
Blowing Up Your Folders – The SharePoint Paradigm Shift

...how to get more value from your SharePoint document libraries

But I really like my folders ...

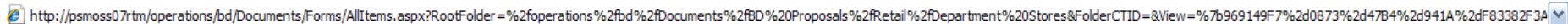
- Content in files shares is typically stored in a collection of nested folders organized in a way that probably made sense to the person who set them up, but may or may not make sense to others.
 - ➔ For example, on an IT Department Shared Drive there might be a folder for every project.
 - Within each project, there might be a folder for Status Reports, another folder for Deliverables, another folder for Project Plans.
 - Within the Deliverables folder, there might be a folder for January, and another for February, and another for March
 - Within the January folder, there might be a folder for Drafts and another for Final documents.
- If you try to find information in a series of nested folders, you have to do a lot of clicking to find what you are looking for.
- But what if you are the program manager responsible for multiple projects and you want to see the most recent Status Report for each of the projects you manage?
- And what if tomorrow, you want to see all deliverables created by John Smith, for any project he is working on?

The trouble with folders ... sort of like the trouble with tribbles – they just keep multiplying!

- Many clicks to get to the content you are looking for
- Inflexible – once the organizational framework is established, it's hard to change
- Content in files shares is typically stored in a collection of nested folders organized in a way that probably made sense to the person who set them up, but may or may not make sense to others
- Doesn't let you easily sort, filter, and create ad hoc views of your content – assumes you know today how you might want to see your content tomorrow

Design with Folders: So, what's the problem?

- While the folder names may be clear in some cases, that's not always true.
- Moreover, people often create folders that are not mutually exclusive so it's hard to tell where to place a document when you are saving.
- Also, take a look at the URL for a sample folder from a MOSS library:

 <http://psmoss07rtn/operations/bd/Documents/Forms/AllItems.aspx?RootFolder=%2foperations%2fd%2fDocuments%2fBD%20Proposals%2fRetail%2fDepartment%20Stores&FolderCTID=&View=%7b969149f7%2d0873%2d47b4%2d941a%2df83382f3a>

- ➔ The entire image isn't even visible in the URL in the browser.
 - ➔ The URL is 220 characters long leaving a maximum of 35 characters available for files stored within the folder.
 - ➔ If there were one more layer of folders (this example shows just 3 nested layers), there would be very few characters available for a meaningful file name.
- In addition, the folder view doesn't actually tell you if there is any content in any of the folders, just that the folder exists – lot's of clicking is required to navigate!

Design without Folders: Easily See What Content is Available

- We can create a view that groups by Content Type, essentially providing the same information as the Folder by type of content. But, the Group By view automatically lets us know how much content is in each category.
- Clicking on the “group by” field expands the view without going to a new screen.

Intranet Home > Operations > Business Development > Team Documents

Team Documents - No Folders

New | Upload | Actions | Settings

Type	Name	Content Type
Content Type : BD Proposal (3)		
Content Type : Brochure (2)		
Content Type : Marketing Presentation (5)		

Intranet Home > Operations > Business Development > Team Documents - No Folders

Team Documents - No Folders

New | Upload | Actions | Settings

Type	Name	Content Type	Company Name	Date Delivered	Target Industry Category
Content Type : BD Proposal (3)					
PDF	Retail Proposal 1 NEW	BD Proposal	Nordstrom	11/1/2007	Retail-Department Store
PDF	Retail Proposal 2 NEW	BD Proposal	Macys	10/4/2007	Retail-Department Store
PDF	Retail Proposal 3 NEW	BD Proposal	Sports Authority	11/15/2007	Retail-Specialty Stores
Content Type : Brochure (2)					
Content Type : Marketing Presentation (5)					

Design without Folders: Easier to Upload

Instead of expecting each contributor to navigate the folder hierarchy or have to make choices to put a document in one folder versus another, content contributors can be guided with drop down and check box metadata choices.

Intranet Home > Operations > Business Development > Team Documents - No Folders > Retail Proposal 1 > Team Documents - No Folders: Retail Proposal 1

OK Cancel

X Delete Item | ABC Spelling... * indicates a required field

Content Type	BD Proposal
Name *	<input type="text"/> .docx
Title	<input type="text"/>
Company Name	Nordstrom
Date Delivered	11/1/2007
Disposition	Pending
Target Industry Category	<input checked="" type="radio"/> Retail-Department Stores <input type="radio"/> Specify your own value: <input type="text"/>

Created at 12/17/2007 4:31 PM by Sue Hanley
Last modified at 12/17/2007 5:14 PM by Sue Hanley

OK Cancel

Design without Folders: Multiple Filters, Dynamic Queries

- While you can certainly create a view that “ignores” folders, rich metadata provides opportunities for users to create their own view of content:
 - Show me all the content, of any type, that we’ve created for the Retail industry? (pre-defined view)

Intranet Home > Operations > Business Development > Team Documents - No Folders

Team Documents - No Folders

New Upload Actions Settings View: **Retail Industry View**

Type	Name	Content Type	Company Name	Date Delivered	Target Industry Category	Disposition
	Brochure 1 NEW	Brochure			Retail-Department Stores	Pending
	Brochure 2 NEW	Brochure			Retail-Specialty Stores	Pending
	Marketing Presentation 1 NEW	Marketing Presentation			Retail-Sporting Goods Stores	Pending
	Marketing Presentation 2 NEW	Marketing Presentation			Retail-Sporting Goods Stores	Pending
	Marketing Presentation 5 NEW	Marketing Presentation			Retail-Department Stores	Pending
	Retail Proposal 1 NEW	BD Proposal	Nordstrom	11/1/2007	Retail-Department Stores	Pending
	Retail Proposal 2 NEW	BD Proposal	Macys	10/4/2007	Retail-Department Stores	Won
	Retail Proposal 3 NEW	BD Proposal	Sports Authority	11/15/2007	Retail-Specialty Stores	Lost

- Show me all the Proposals to Department Stores? (2 filters)

Team Documents - No Folders

New Upload Actions Settings

Type	Name	Content Type	Company Name	Date Delivered	Target Industry Category
	Retail Proposal 1 NEW	BD Proposal	Nordstrom	11/1/2007	Retail-Department Stores
	Retail Proposal 2 NEW	BD Proposal	Macys	10/4/2007	Retail-Department Stores

Can you use folders in SharePoint? Sometimes, you should ...

Creating a Document Set (a feature not yet supported in MOSS)

- ➔ For example, the Marketing Department wanted to create a way to group a Brochure, instructions for using the brochure with customers, and a template for a cover letter to use to send the brochure to the customer. The department had about 30 different brochures that they published.
- ➔ The solution was to create 30 folders, each named with the brochure name.
- ➔ All three documents related to the brochure were stored in the folder so that it would be easy to ensure that users would know that they should reference all three documents when they want.
- ➔ But, we also created a view of the document library without the folders so that users could use SharePoint's sorting and filtering capabilities

Security

- ➔ You might also want folders for security – you can assign security at the folder level.
- ➔ This is useful when you publish content in a library where some users can only see certain documents. If you assign security at the Folder, anyone with Contributor privileges can add documents (to the secure folders where they have privileges), effectively providing “item level” security without requiring Designer privileges.

Consistent Grouping

- ➔ If you always look at content by a certain category (for example, financial reports for a month/year), then grouping documents in to folders helps user quickly navigate to just what they need.

Large Document Libraries

- ➔ SharePoint document libraries can hold up to 2 million documents, but the interfaces for showing more than 2000 documents do not perform well beyond a thousand entries. You may want to use folders for grouping documents into collections of no more than 1000 documents.

Ways to break the folder paradigm ...

Instead of ...

A folder for each project

A folder for each month

A folder for each person

A folder for each Application

Browsing for content

Try ...

A site column called Project Name

A site column called Report Date

Nothing – SharePoint already has a Created By field so you will always know who created/uploaded a document.

A site column called Application with a standard list of values that you can maintain centrally, ensuring that everyone uses the same standard list and spells the names the same way

Searching using properties or full text search