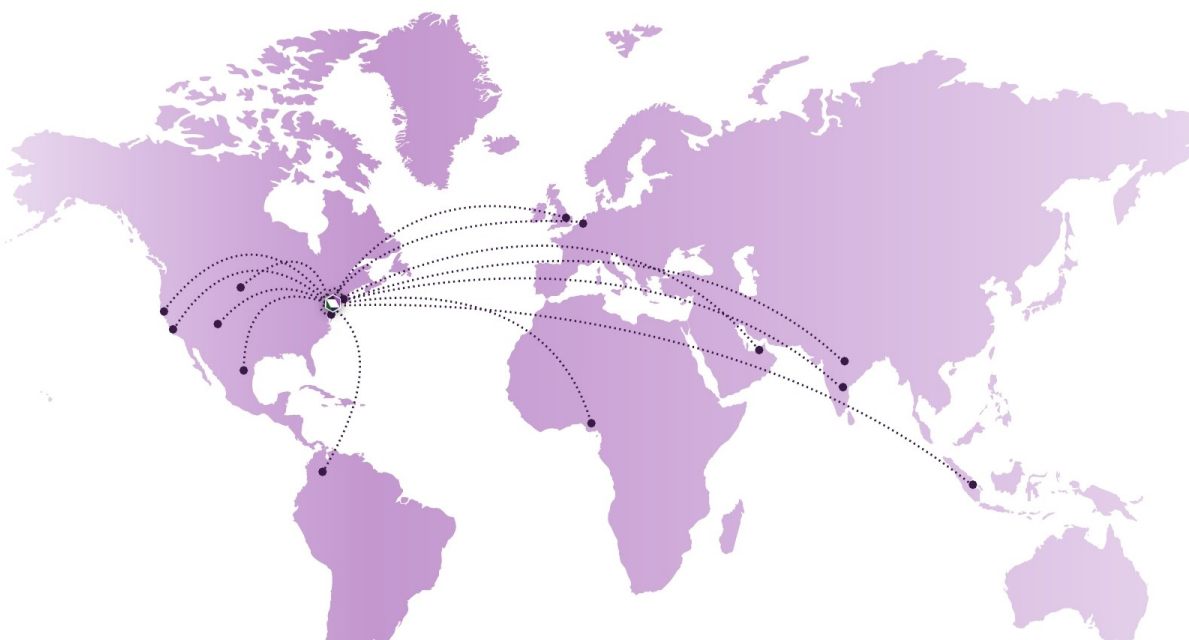




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Global Knowledge & Information Management Services

The Benefits of Choosing Metadata v. Folders in SharePoint Document Libraries





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Clients often ask us why we recommend using metadata over managing folders and subfolders in a SharePoint document library. This white paper offers our view on the advantages of tagging documents with metadata versus simply using folders to organize and navigate through documents in SharePoint document libraries.

The Importance of Metadata

Before moving forward, let's first define what "metadata" means. In the context of this white paper, metadata means "descriptive data about a document," or in other words, characteristics of a document that allow you to categorize it. A document's author, date created, and topic are typical examples of metadata. For corporate documents, additional common metadata can include topic, business area

(department or division), location, and document status, just to mention a few. When you tag documents with metadata, you then have the flexibility to organize and display documents in multiple ways according to how you have categorized the content. You also have the ability to search for content and find it more easily. The image below highlights the document type and business area columns in a sample SharePoint document library.

The Old Habit of Using Folders in Document Libraries

People are used to storing and managing electronic documents in a folder structure because it is a close representation of the old-fashioned paper folders that we all used at some point of time (or still use). Additionally, you

Demo Document Library

		Document Type	Business Area	Author	Modified	Modified By
✓	Name					
	Count= 12					
	Annual Plan and Schedule	Law and Legislation	Compensation	Tatiana Baquero	45 minutes ago	Zach Wahl
	Board meeting agenda	Board material	Legal Services	Tatiana Baquero	5 days ago	Zach Wahl
	Contract with AAB	Contract	Strategic Policy	Tatiana Baquero	About a minute ago	Zach Wahl
	Contract with XYY	Contract	Compensation	Tatiana Baquero	About a minute ago	Zach Wahl
	Data Entry Worksheet	Form	Member Services	Tatiana Baquero	About an hour ago	Zach Wahl
	Department Terms and Conditions	Contract	Budget and Procurement	Tatiana Baquero	A few seconds ago	Zach Wahl
	Disability Medical Report	Form	Accounting	Tatiana Baquero	About an hour ago	Zach Wahl
	Guide to Retirement	Brochure	Member Services	Tatiana Baquero	23 minutes ago	Zach Wahl
	Notice of Final Calculation	Form	Benefits Programs	Tatiana Baquero	About an hour ago	Zach Wahl
	Statement of Identity - SI	Form	Member Services	Tatiana Baquero	About an hour ago	Zach Wahl
	Tax Benefits	Memo	Policy and Compliance	Tatiana Baquero	About an hour ago	Zach Wahl
	Use of PII in External Communications	Policy	Policy and Compliance	Tatiana Baquero	About an hour ago	Zach Wahl



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may be familiar with File Explorer (previously known as Windows Explorer). Pretty much everyone using a computer uses File Explorer. Its graphical user interface offers a simple file system navigation tool that allows people to manage their files within folders and subfolders. People have been using this tool for years, at least since the release of Windows 95, and it seems very intuitive. Likewise, SharePoint offers a similar folder functionality for document libraries. Therefore, it is not uncommon that users creating a document library in SharePoint for the first time start using folders right away instead of creating columns to tag documents with metadata and library views.

Using Folders in SharePoint Document Libraries is Not Ideal

Folders and subfolders offer a very limited way to store

documents. Folders present only one way of document grouping, which may not work for everyone. People have different approaches to organizing information; they may vary based on their professional background, search preferences, and primarily, their role in the organization. Some people prefer to see documents grouped by business area, while others may prefer to see them by document type or by year.

Last year, at a client site, we created a SharePoint document library to store documents that would later be published in their Intranet. Some employees suggested organizing the new document library by folders representing their business areas and sub-folders representing their divisions within. We explained to our client that the structure they suggested would not be intuitive for an employee who wanted to see the documents by document type or by any other metadata field. The image below shows an example of how that SharePoint Document Library would have looked like if the client had

The screenshot shows a SharePoint interface for a 'Demo Document Library'. On the left, a navigation pane displays a hierarchical folder structure: 'Folders' > 'Communications' > 'Finance' > 'Accounting', 'Compliance', 'Internal Audit', 'Legal Services', 'Management Services' > 'Budget and Procurement', 'Facilities', 'HR', 'IT' > 'Quality Management', 'Security', 'Records Management', 'Office of the President', 'PMO', 'Retirement Services', and 'Strategic Policy'. The main area on the right is titled 'Demo Document Library' and features a top bar with 'New', 'Upload', 'Sync', 'Share', and 'More' options. Below this, there are tabs for 'All Documents', 'By Business Area', and 'In Folders (All Docs)'. A search bar labeled 'Find a file' is also present. The document list below has columns for 'Name', 'Document Type', 'Business Area', 'Author', 'Modified', and 'Modified By'. It shows a 'Count= 9' and lists documents such as 'Communications', 'Finance', 'Internal Audit', 'Legal Services', 'Management Services', 'Office of the President', 'PMO', 'Retirement Services', and 'Strategic Policy', each with a 'Document Type' of '...' and a 'Modified' date of 'About an hour ago' by 'Zach Wahl'.

Name	Document Type	Business Area	Author	Modified	Modified By
Count= 9					
Communications	...			About an hour ago	Zach Wahl
Finance	...			About an hour ago	Zach Wahl
Internal Audit	...			About an hour ago	Zach Wahl
Legal Services	...			About an hour ago	Zach Wahl
Management Services	...			About an hour ago	Zach Wahl
Office of the President	...			About an hour ago	Zach Wahl
PMO	...			About an hour ago	Zach Wahl
Retirement Services	...			About an hour ago	Zach Wahl
Strategic Policy	...			About an hour ago	Zach Wahl



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organized it in folders and subfolders by business area.

That folder structure would have offered a very limited way to access information, which may have been intuitive for only a few people. In the end, our client understood that a folder-based document library was not going to work for them because it offered a very narrow structure and was not scalable.

Reasons to Use Metadata Instead of Folders

Tagging documents with metadata in a SharePoint document library provides content managers with the flexibility to display multiple library views to meet information access needs from different users. In the business case provided above, we

suggested our client that instead of creating business area folders in that SharePoint document library, employees should tag documents with “business area” and “document type”, so that the content manager could display a library view of the documents *grouped by* business area and a view of the documents *grouped by* document type. The image below illustrates how a document library view looks like when grouping documents by document type. As an alternative, the image on the following page shows the option to select a different view, such as by business area, to view documents in this library.

Both library views (by document type and by business area) offer the flexibility and scalability that our client needed and that a folder-based structure would not offer.

Demo Document Library

	New		Upload		Sync		Share	More ▾
All Documents	By Business Area	By Document Type	...	Find a file				
✓		Name		Document Type	Business Area	Author	Modified	Modified By
▸ Document Type : Board material (1)								
▸ Document Type : Brochure (1)								
▾ Document Type : Contract (3)								
	Contract with AABB	...	Contract	Strategic Policy	Tatiana Baquero	4 minutes ago	<input type="checkbox"/>	Zach Wahl
	Contract with XYYY	...	Contract	Compensation	Tatiana Baquero	3 minutes ago	<input type="checkbox"/>	Zach Wahl
	Department Terms and Conditions	...	Contract	Budget and Procurement	Tatiana Baquero	2 minutes ago	<input type="checkbox"/>	Zach Wahl
▸ Document Type : Form (4)								
▸ Document Type : Law and Legislation (1)								
▸ Document Type : Memo (1)								



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Demo Document Library

SharePoint interface showing a document library view filtered by Business Area. The view displays a list of documents grouped by Business Area.

Navigation: New, Upload, Sync, Share, More

Filter: All Documents, **By Business Area**, By Document Type, Find a file

Name	Document Type	Business Area	Author	Modified	Modified By
Business Area : Accounting (1)					
Business Area : Benefits Programs (1)					
Business Area : Budget and Procurement (1)					
Business Area : Compensation (2)					
Annual Plan and Schedule	Law and Legislation	Compensation	Tatiana Baquero	49 minutes ago	Zach Wahl
Contract with XXYY	Contract	Compensation	Tatiana Baquero	4 minutes ago	Zach Wahl
Business Area : Legal Services (1)					
Business Area : Member Services (3)					
Business Area : Policy and Compliance (2)					

When to Use Folders in SharePoint Document Libraries

By now, you may be wondering whether it is bad to use folders in SharePoint document libraries. And the answer is: no, it is not bad to use folders in a SharePoint document library. In fact, folders allow content managers to set permissions so that only certain users or user groups can access information that is confidential.

However, if you identify that you need to use folders in a document library because you have to set permissions, do not let that discourage you from still using customized metadata to tag the documents. SharePoint still provides you with the

flexibility to create document library views that allow you to see documents and folders at the same time, and also views that allow you to see all documents outside of folders. With the latter option, you still can benefit from creating views with the flexibility of filtering documents based on metadata. To display all documents in a library without displaying folders, go to the bottom of the “Edit View” page for the view you are creating or want to modify, and select the option “Show all items without folders”, as indicated on the following page.



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⊞ Totals

⊞ Style

⊞ Folders

Specify whether to navigate through folders to view items, or to view all items at once.

Folders or Flat:

- ☐ Show items inside folders
- ☒ Show all items without folders

Show this view:

- ☒ In all folders
- ☐ In the top-level folder
- ☐ In folders of content type: Folder ▾

Closing Remarks

In short, using metadata to tag documents and displaying various library views has additional benefits over managing a structure based exclusively on folders and subfolders. Even though it is not always easy for people to change their mindset from using folders to using tags and library views, it is worth exploring the beauty and flexibility that metadata has to offer when storing and managing documents in SharePoint document libraries.

To learn more about metadata, you can refer to EK's blog [Six Ways to Simplify Metadata Management](#) and EK's white paper [Creating a Managed Metadata Column in SharePoint Online](#).

If your organization needs help with designing metadata for SharePoint document libraries or implementing a SharePoint solution, do not hesitate to [contact Enterprise Knowledge](#). Our taxonomists and SharePoint experts will work with you and your team to meet your needs.

Enterprise Knowledge (EK) is a services firm that integrates Knowledge Management, Information Management, Information Technology, and Agile Approaches to deliver comprehensive solutions. Our mission is to form true partnerships with our clients, listening and collaborating to create tailored, practical, and results-oriented solutions that enable them to thrive and adapt to changing needs.

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