THE ULTIMATE GUIDE TO SHAREPOINT® METADATA

BY BAMBOO SOLUTIONS

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SO WHAT'S THE DEAL WITH METADATA?

1

Metadata is everywhere. Well, not in a physical sense, but it can be found anywhere information is stored. Metadata can be many kinds of information, whether it's a location, a date, or a catalog item number. When it comes to document management, adding metadata allows users to easily find

what they are looking for. When it comes to metadata in SharePoint, it is the data about the documents. These can be any properties that describe the attributes of the document. That may seem a little broad, but it's the easiest way to explain metadata in SharePoint.

When you use SharePoint products, you're able to manage the metadata centrally, as well as organize it in a way that makes sense for your business. As for why you need metadata within SharePoint, it's pretty simple. One aspect of SharePoint allows you to define the metadata you want to maintain and then SharePoint provides tools which use the metadata so you can organize and find the information you're looking for.

2 REASONS TO USE METADATA WITHIN SHAREPOINT

As a SharePoint user, one thing you'll constantly look to improve and maintain is your organization. Simply put, you want to be able to find the data and/or information that you're looking for within SharePoint in a timely manner. The importance of metadata in SharePoint is not a one-dimensional, linear explanation, but that's because there are so many reasons why it's beneficial. You already know that metadata allows an end user to create views and pull together a list of customized documents. Consistent usage of metadata across documents within a library will also help improve your search results, thanks to SharePoint's ability to sort and filter data specific to an end user's needs.

There is a security benefit to all of this as well, because metadata usage in SharePoint allows you to block certain users from having access to sensitive data. This allows you to store regular content alongside sensitive content. Metadata security for SharePoint allows you to easily set up one document library, accessed by thousands of users, but apply different user permissions throughout.

# HOW TO CREATE METADATA IN SHAREPOINT 2013: 101

Since its introduction into SharePoint, metadata has played a pivotal role in customized documentation, and helping users easily tag and structure content. However, there are still plenty of users that have been hesitant to incorporate it into their daily SharePoint lives. If that sounds like you, here's an easy-to-follow guide to get you started.

Here's how to set up metadata navigation:

Locate the list or library you wish to configure for metadata navigation.

Select the list or library tab – Select **List Settings** or **Library Settings**.

In **General Settings**, select **Metadata navigation settings**.
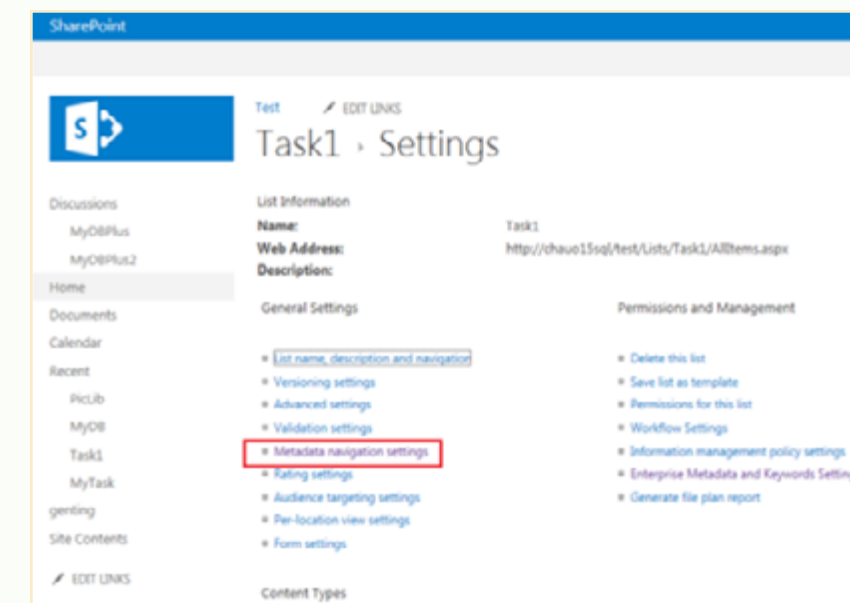
Within the **Configure Navigation Hierarchies** section, select which fields you want displayed in the navigation hierarchy.

Select **Add**.

If you want to remove folders from the display, select **Folders** and select **Remove**.

In **Configure Key Filters** section, choose which fields you want added as Key Filters and select **Add**.

Configure Key Filters

Select from the list of available fields to use them as key filters for this list. Selected fields will appear underneath the Site Hierarchy tree when viewing items in this list. You can use these fields to filter your current view to show only items matching that value.

Fields that are available for use as navigation hierarchies include columns on this list that are one of the following types:
- Content Type
- Choice Field
- Managed Metadata Field

Available Key Filter Fields:
Checked Out To
Content Type
Created
Created By
Managed Metadata1
Modified

Selected Key Filter Fields:
Modified By

Add >

< Remove

Description:
Person or Group - No Description

Choose in the **Configure automatic column indexing for this list** whether you want to create indexes automatically on this list or not. This is highly recommended because it helps get better results when users use the navigation tree and columns. To do so, select **Automatically manage column indexes on this list**.

Select **OK**.

Your metadata navigation is now ready to use. But before we wrap up this section, here are some additional tips to keep in mind when creating metadata in SharePoint:

• First, always double check the spelling. This may sound very simple, but it is very important to create accurate, typo-free metadata. Incorrect spelling of metadata will result in your document not being recognized when searched for and ultimately hidden from the search procedure.

• Use as many descriptive words as you can in the Description field when you create a new column. The more descriptive you are about the information you require, the more likely co-workers will enter the correct and relevant metadata.

• Be clear when creating questions for metadata by ensuring there are definite separations to help prevent metadata tags being linked to the wrong document or image. Mistakes like that can be very frustrating when searches are bringing up numerous irrelevant documents.

• Search lists should be kept as short as possible to help the user and to minimize their need to troll through long lists to find what they need.

4
WHERE CAN YOU GO FROM HERE?

As the National Information Standards Organization Press points out, "metadata makes it easier to retrieve, use, or manage an information resource." When metadata is utilized in SharePoint, what you get is a resource that makes searching for items much easier. Metadata in SharePoint also allows for better organization with projects, because you can track the progress by users, by status, and by percent completion.

Metadata helps you get more out of your SharePoint experience, and it's steadily getting refined improvements to its functionality in SharePoint. As the evolution of SharePoint continues, so do the metadata algorithms for data tracking.

Plain and simple, not taking the time to attach metadata when creating, uploading, or editing documents in SharePoint means you're not getting the full benefit of accrued data in SharePoint. Be a smarter SharePoint user. The metadata awaits. ■

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