

? Why



Easier Online Searches and Filtering files to find your documents based on a specific field property.



Convenient for people to see relevant items from a SharePoint library.



Convenient options to tag documents and edit document metadata in SharePoint

📖 Scenario



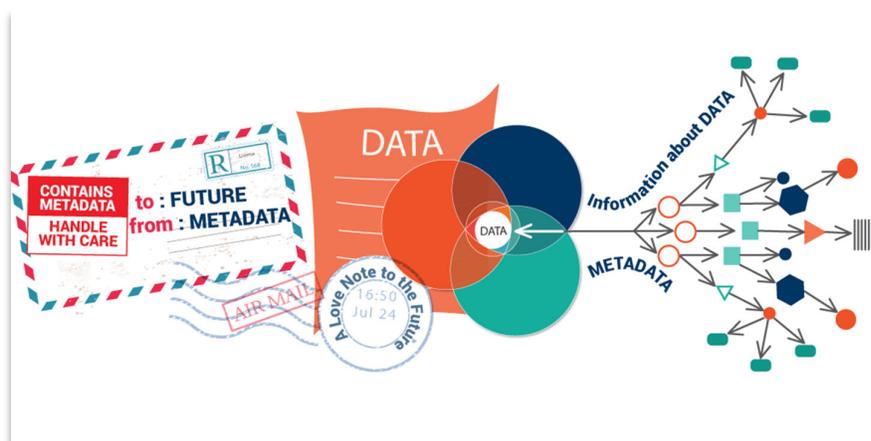
1 You want edit document metadata to see more details about a particular document – like author, subject etc..



2 There are 4 ways to edit document metadata in SharePoint - Document Information Panel, Bulk Edit Properties, Quick Edit or Office Applications Document Information Panel



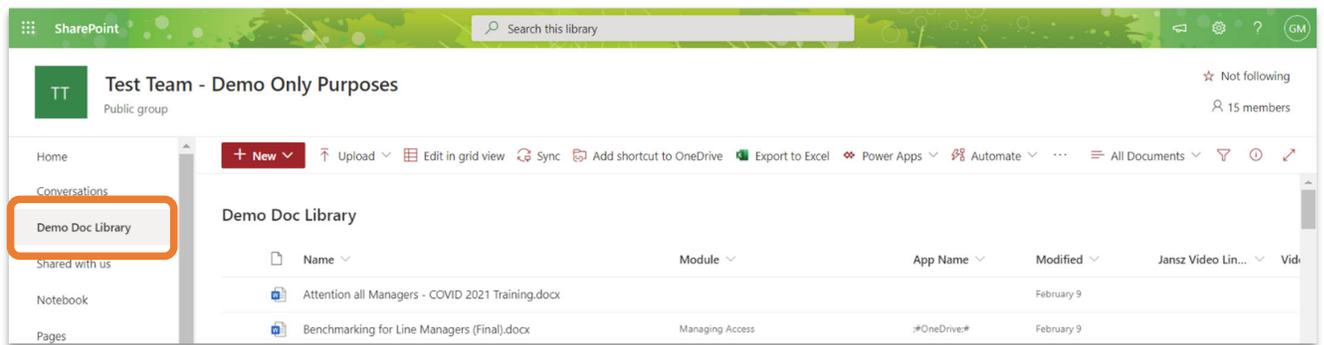
3 The Name property is automatically assigned once uploaded in library. It's important to check the files properties and add values to any empty fields.





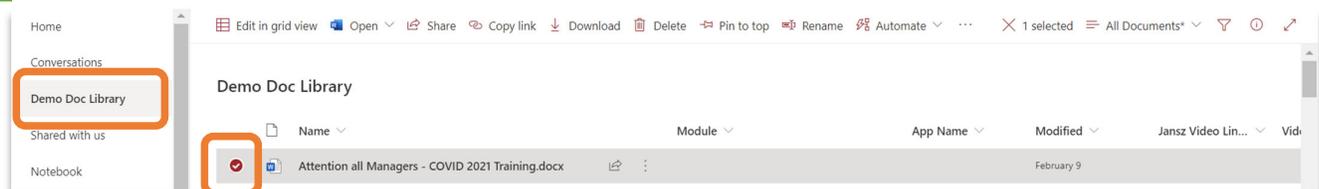
How?

1. Go to **Document Library** in SharePoint



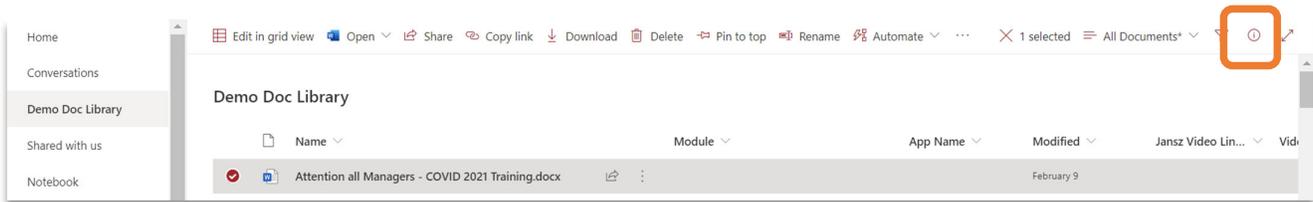
Document Information Panel

2. In the Document Library, Select a **file**

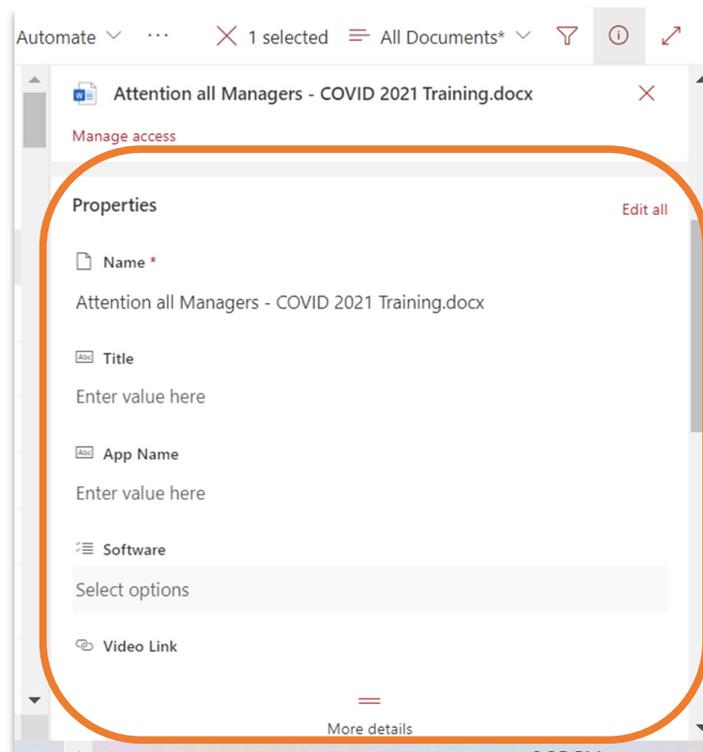


Editing the Properties of a File

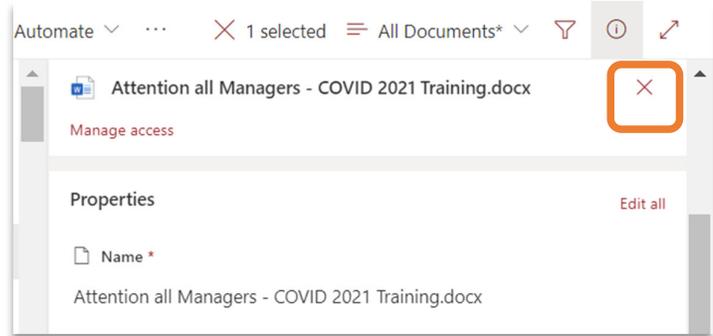
- Click on the **Document Information Panel** looks like this (accessible when you click “i” in the upper-right-hand-corner of a document library)



- Fill in the information (meta data) for the document in the Document Information Panel window.

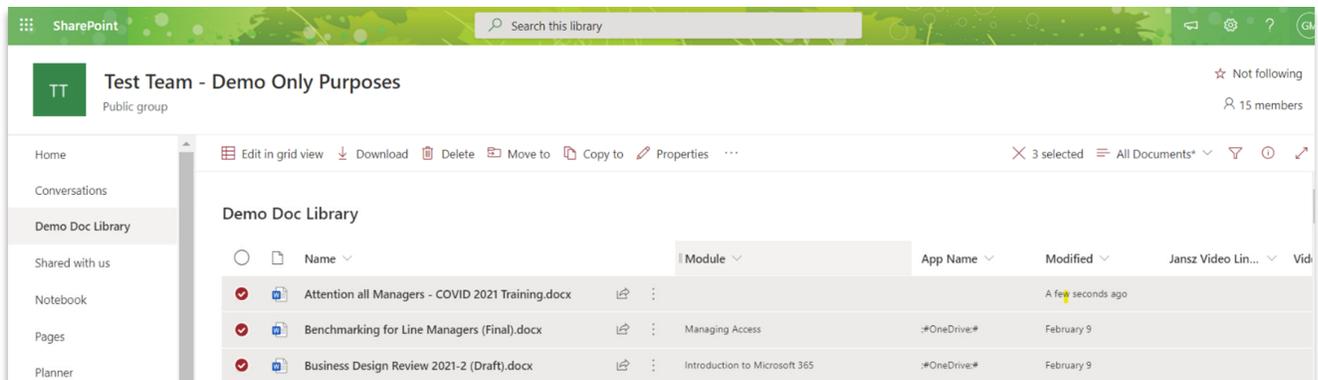


5. Click on **Close**



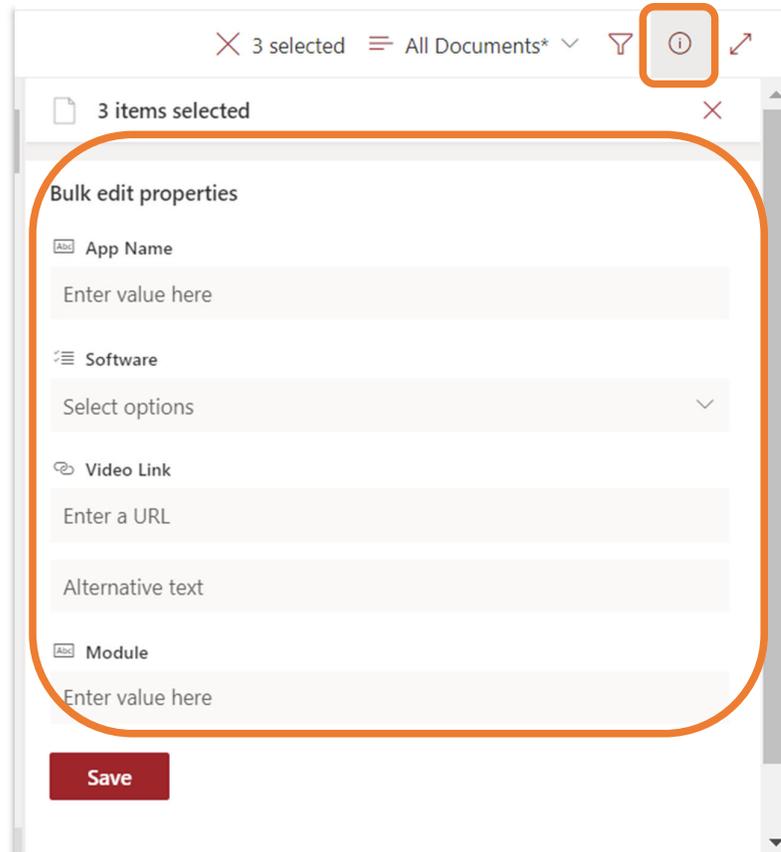
Bulk Edit Properties

6. What if you want to tag multiple documents at once? Select **Multiple Files**



Editing the Properties of a File

7. Choose **Document Information Panel**, just like above, and you can then apply properties to many documents at once.

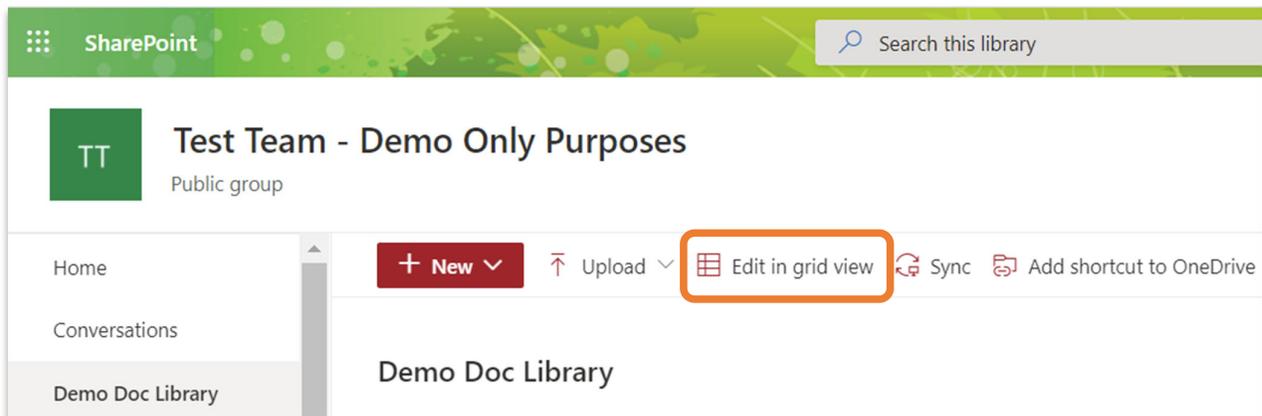


8. Click on **Save** once you have filled in the information (meta data) for the document.

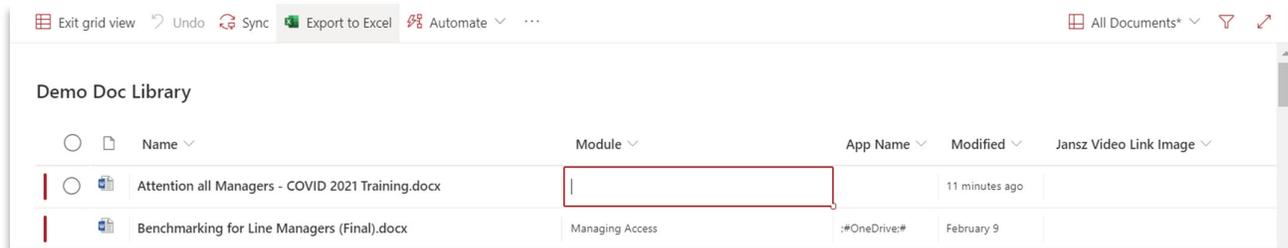


Quick Edit

9. In the Document Library, Click on **Edit in grid view**

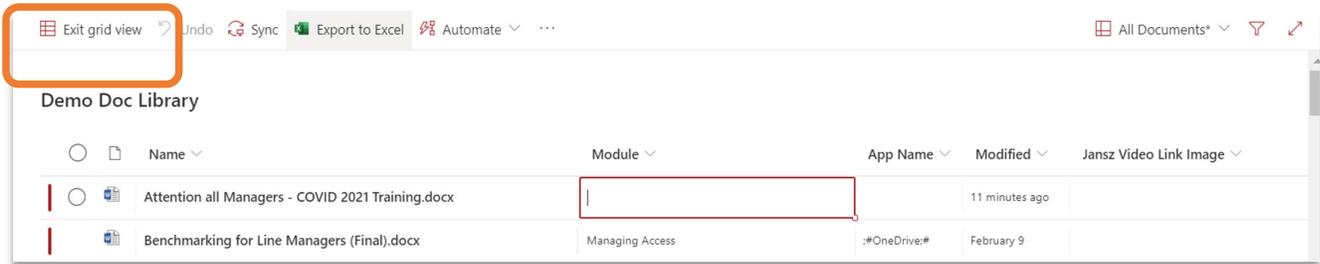


10. Click in Column Cell and Enter data





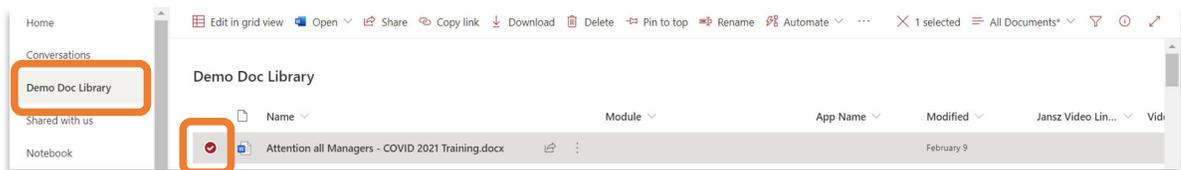
11. Click on **Exit grid view** to apply changes



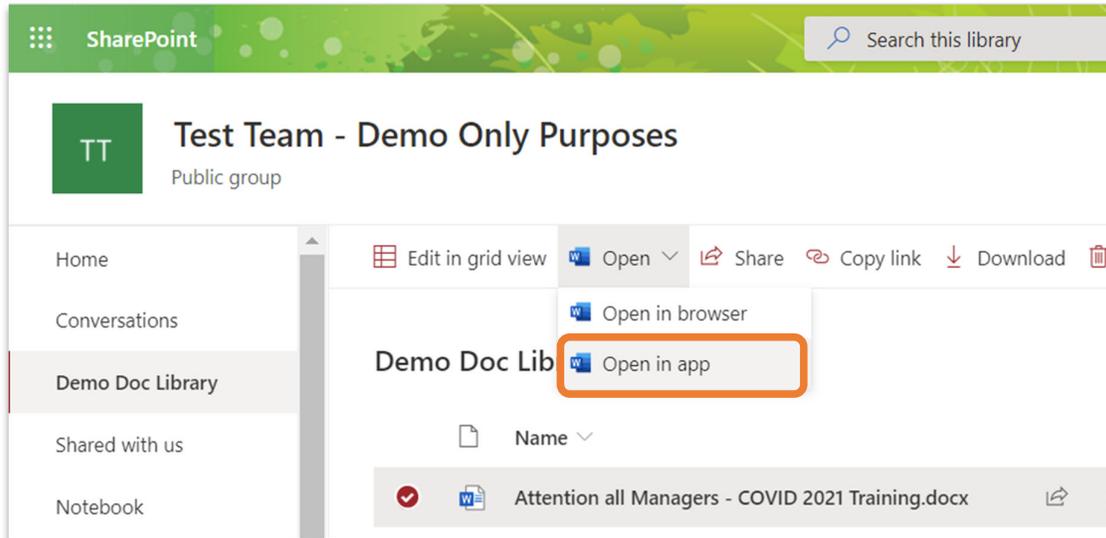
Office Applications Document Information Panel

12. You can tag them right inside of the Office documents (Word, Excel, PowerPoint). To be able to edit SharePoint metadata inside of the Office documents, the document has to exist in the SharePoint document library.

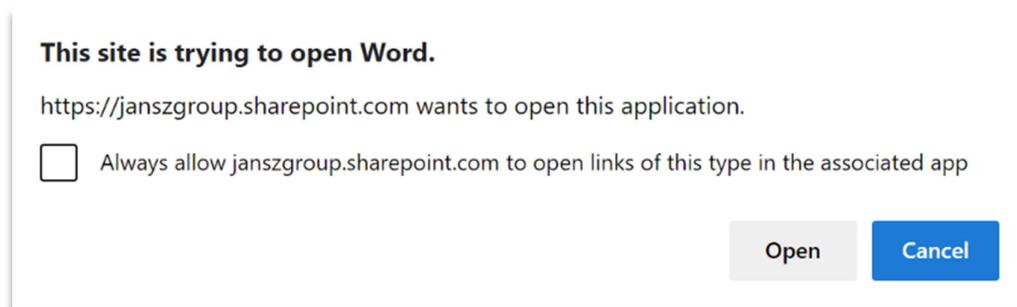
13. In the Document Library, Select a **file**



14. Click on **Open in app**



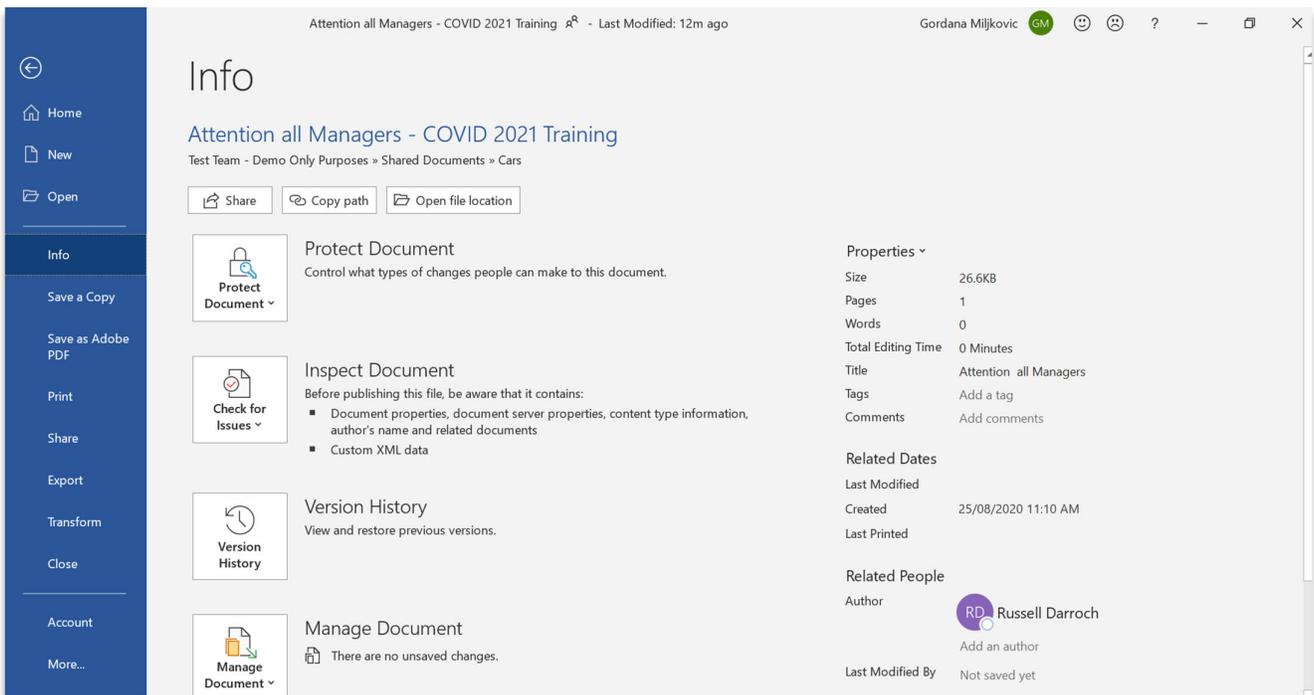
15. If you are using Microsoft Edge you will be asked if you want to **Open Word**



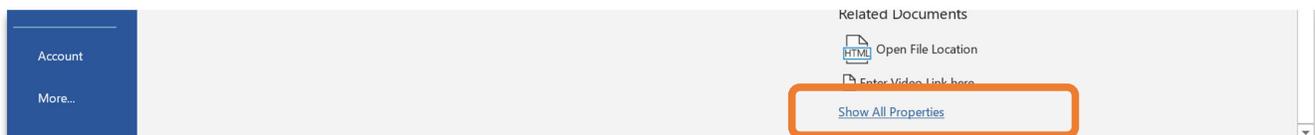
Editing the Properties of a File

16. Click on **Open**

17. Once in Word/Excel/PowerPoint, click on **Info Tab**



18. Click on **Show All Properties**



Editing the Properties of a File

19. All of the SharePoint document library metadata exists in your document as well. All the choice, drop-down fields, date fields, text fields, whatever metadata you had in SharePoint document library exists in the document as well!
20. As you click on the fields, you will see the same metadata choices as within a SharePoint document library. Fill in the information (meta data) for the document
21. Back in SharePoint, checking the Document Information Panel shows revised metadata