Columns & Metadata

The creation of columns and the addition of metadata improves searchability of content making it easier than ever to find content across SharePoint!

Create a column

1. From the site page, locate and select the appropriate list or library.
2. Click the List or Library tab.
3. In the Manage Views group, click Create Column.
4. In the Column Name field, enter the appropriate name.
5. In the The Type Of Information In This Column Is area, select the appropriate radio button.
6. In the Description field, enter the appropriate description for the column.
7. Select the appropriate options.
8. Click OK.

Add metadata to a library

1. To limit the number of folders added to a library and to extend the search scope inside a library, add metadata that can be used as sorting and search criteria.
2. In the left navigation pane, select the library you want to modify.
3. Click the Library tab.
4. In the Settings group, click Library Settings.
5. Under Columns, click Create Column.
6. In the Column Name field, enter a name for the new column.
7. Under The Type Of Information In This Column Is, select the appropriate type of information.
8. If needed, specify any additional column settings and click OK.
9. Return to the library.
10. The new column has been added to the library.
11. To enter the required metadata for an existing document, click the Open menu icon located to the right of the document.
12. Click the More Actions icon.
13. Select Properties.
14. In the added metadata field, enter the appropriate information.

Change the columns in a document library view

1. In the left navigation pane, click Site Contents.
2. Locate the appropriate list or library.
3. Next to the appropriate app, select the Click For More Information icon.
4. Click Settings.

If you need more help, please reach out to your division's FSSA Super User or send an email to SharepointRequests@fssa.in.gov with a description of your issue.

5. Locate the Views area.
6. Under View, select the appropriate view name.
7. In the Edit View area, expand Columns.
8. Next to the appropriate column, select the Display checkbox.
9. To change the column order, select the Position From Left dropdown.
10. Click OK.

Add a choice column to a list

1. Before you can add a workflow to a list or library you will need to add a Choice column with three or more values.
2. The values in the Choice column are then used as the states that the workflow tracks.
3. Lists can have multiple Choice columns, however only 3 values in one Choice column can be entered.
4. Click the List tab.
5. In the Manage Views group, click Create Column.
6. In the Column Name field, enter the appropriate name.
7. In the The Type Of Information In This Column Is area, select the Choice radio button.
8. In the Description field, enter the appropriate description for the column.
9. Under Require That This Column Contains Information, select Yes.
10. To make sure each item in the list has a different value, under Enforce Unique Values, select the Yes radio button.
11. In the Type Each Choice On A Separate Line field, enter the choice names to use.
12. In the Display Choices Using area, select the radio button of the appropriate choice.
13. Under Allow 'Fill-In' Choices, select No.
14. Under Default Value, select the appropriate value.
15. Click OK.

Create a new column

1. In the left navigation pane, click Site Contents.
2. Locate and select the appropriate list or library.
3. Click the List or Library tab.
4. In the Manage Views group, click Create Column.
5. In the Column Name field, enter the appropriate name.
6. In the The Type Of Information In This Column Is area, select the appropriate radio button.
7. Note that your selection from this area will alter the remainder of the column settings. For example, the choices for Person Or Group will differ from the choices for Single Line Of Text.
8. This example will demonstrate the settings for a column in which the information contains a single line of text.

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9. In the Description field, enter the appropriate description.
10. In the Require That This Column Contains Information area, select the appropriate radio button.
11. In the Enforce Unique Values area, select the appropriate radio button.
12. In the Maximum Number Of Characters field, enter the appropriate number.
13. In the Default Value area, select the appropriate radio button.
14. In the Default Value field, enter the appropriate information.
15. Click OK.

Create a column in a list

1. In the left navigation pane, select the appropriate list.
2. In the list area, click the Add icon.
3. Select the appropriate column option.
4. To view additional column options, click More.
5. In the Column Name field, enter the appropriate name.
6. In the The Type Of Information In This Column Is area, select the appropriate radio button.
7. In the Description field, enter the appropriate description.
8. In the Additional Column Settings area, select the appropriate options.
9. When finished, click OK.

Add a column in a list

1. In the left navigation pane, select the appropriate list.
2. In the list area, click Quick Edit.
3. In the list area, select the Add Column icon.
4. From the Add Column dropdown, select the appropriate column type.
5. In the Column Name field, enter the appropriate name.
6. In the The Type Of Information In This Column Is area, select the appropriate radio button.
7. In the Additional Column Settings area, enter the appropriate information.
8. Click OK.
9. Click Done.

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