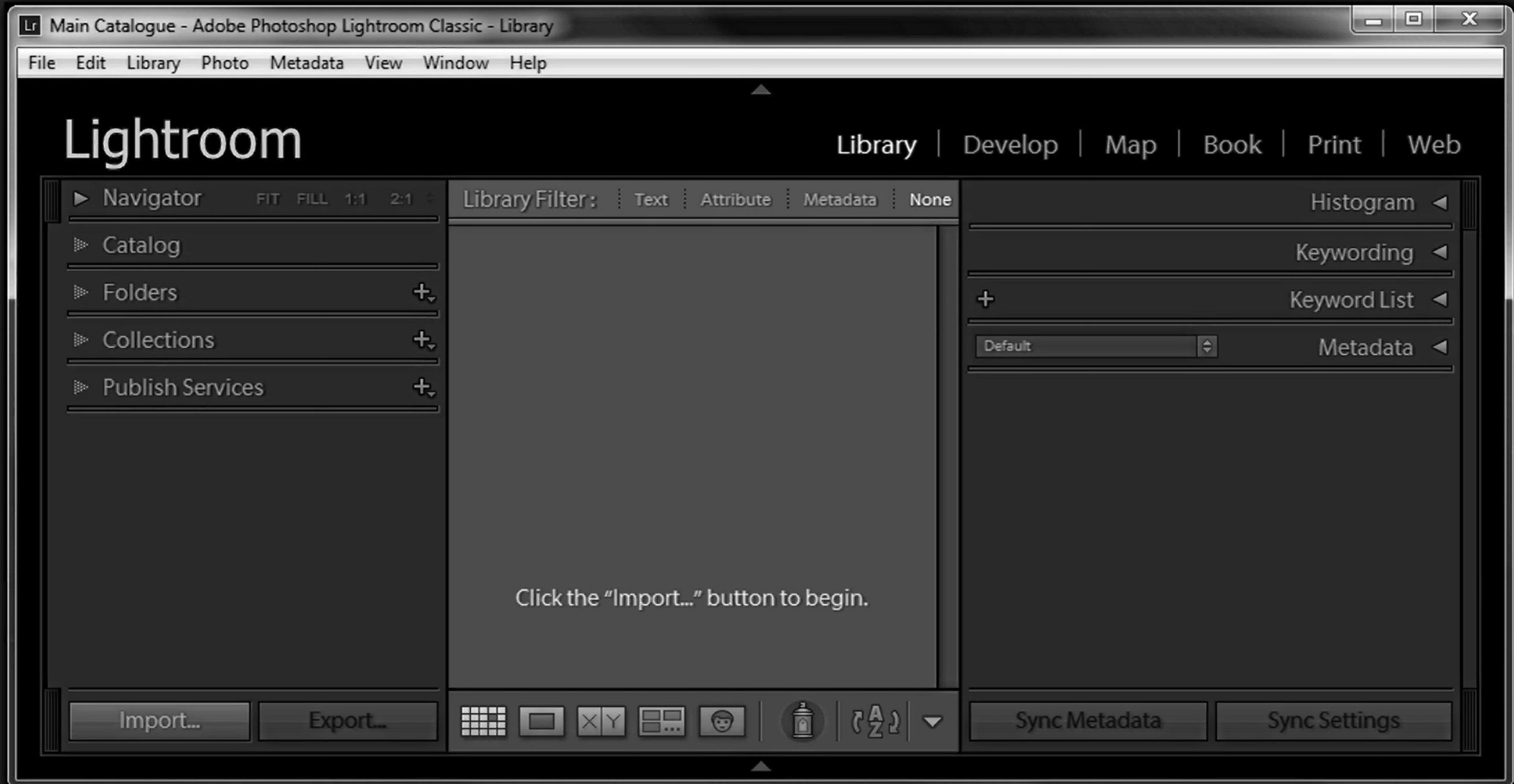


# STRATEGIES FOR SETTING UP LIGHTROOM

Quick Guide  
Written by Rob Evers



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Luckily, the people at Adobe have thought this through. They've supplied systems within Lightroom that make it easy to create a workflow which is both logical and straightforward. This workflow is easy to personalize and leaves lots of room for individual choices. It's important to understand that the decisions made at the very beginning of using Lightroom (LR) will have a huge impact on how easy it is to import, categorize, and find those photos later on.

**After reading this guide, you will know the following:**

- What directory structure works best for storing photographs.
- The ease and importance of backups.
- How to create a Lightroom catalog.
- How to easily import and organize photographs.
- How to easily locate any photo quickly.

 **Recommended Reading:** If you want to learn how to enhance your photos and create better images, grab a copy of Photzy's premium guide: [Ultimate Guide to Fundamental Editing](#).

## ONE DIRECTORY

Storing photographs in multiple directories under multiple topics is a possible approach; however, in my experience, that only results in total chaos. With multiple directories it becomes very difficult to find the photo you're looking for. Importing photos under a multiple directory system is also difficult because a decision about where to put it needs to be made for each and every photo on import. It then becomes challenging to remember where any individual image was saved. Instead of saving to multiple locations, I'm suggesting that all photographs be placed in a single directory.

When looking at the many opinions of how to organize photos in Lightroom, the most efficient ones all have the same common approach. That approach is to put all photographs in a single directory. It may seem counterintuitive; however, it does facilitate a

more comprehensive searching system which will be discussed further on in this guide. First, let's look at some things to consider when creating that single directory.

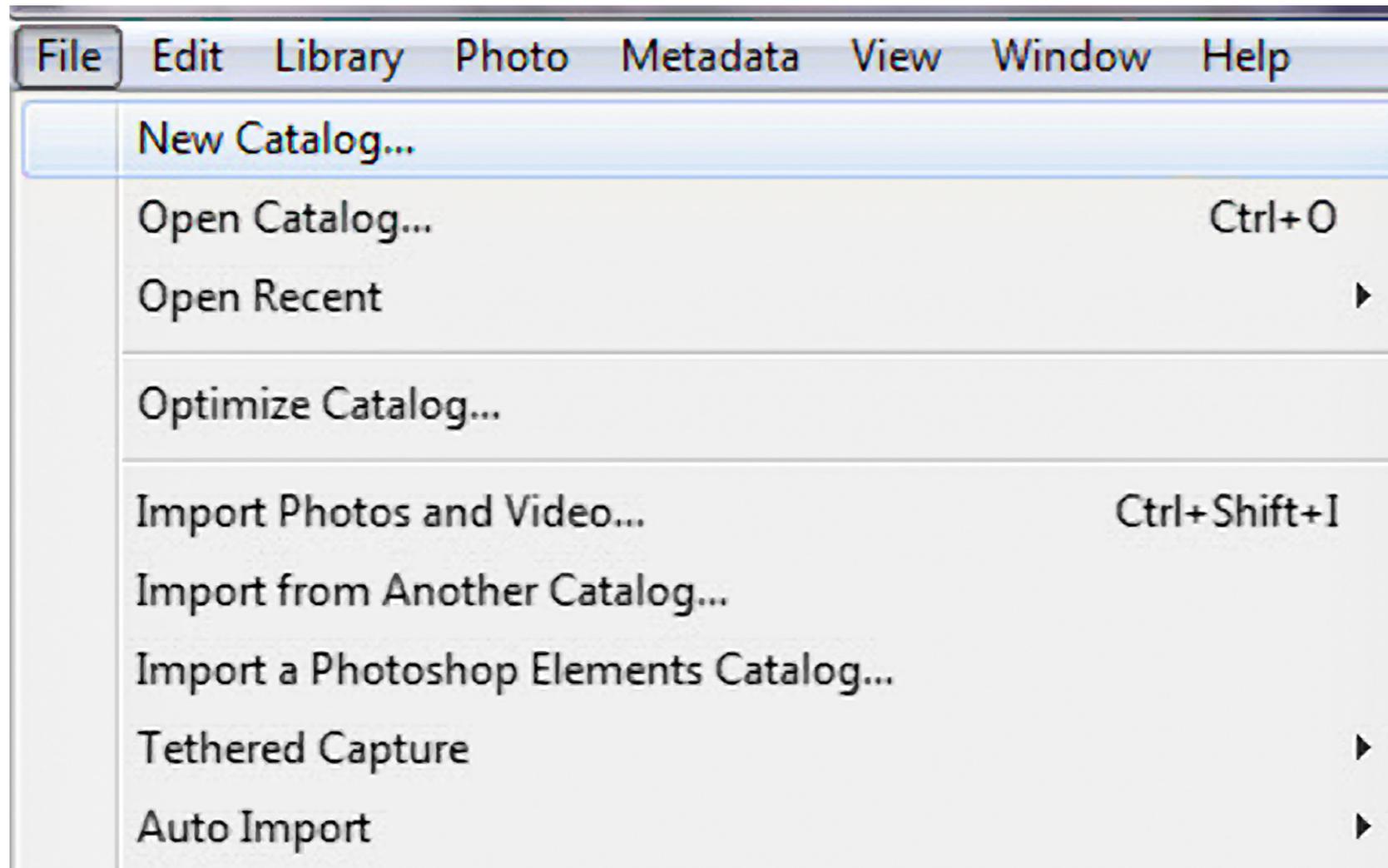
The single directory should be created on a drive that has a lot of free space. That drive needs to be large in order for there to be adequate space for your current images as well as those to come. Use a logical name for the directory like "ALL PHOTOGRAPHS" or anything else that makes sense to you.

This main photo directory should not be on a drive that contains your program files. The drive should be a large internal one or an external USB drive. Fortunately, large drives have become very affordable. At the time of this writing, an external 4TB drive can be purchased for just over \$100 CAD.

## BACKUPS

Talking about drives, now would be a good time to think about the backup of your photographs. With only one directory requiring backup, the process will be simple. Putting that backup directory on an external drive is a good idea. Of course, there are other options like storing a backup in the cloud.

Online backups can be good if there's high speed internet uploading available. If not, it can be an expensive and time-consuming proposition. In either case, backups need to be stored off-site to protect against fire or theft.



Screenshot by Rob Eyers

## THE CATALOG

Lightroom knows where photos are kept by the use of a catalog. This catalog holds all the data pertaining to the location (on your computer or external drive) of every photograph. In order to start with a clean slate, a new catalog needs to be created.

To create a new catalog, go to **File/New Catalog**, select a location and name it something like "My Catalog." This catalog will be the only one for all your photos.

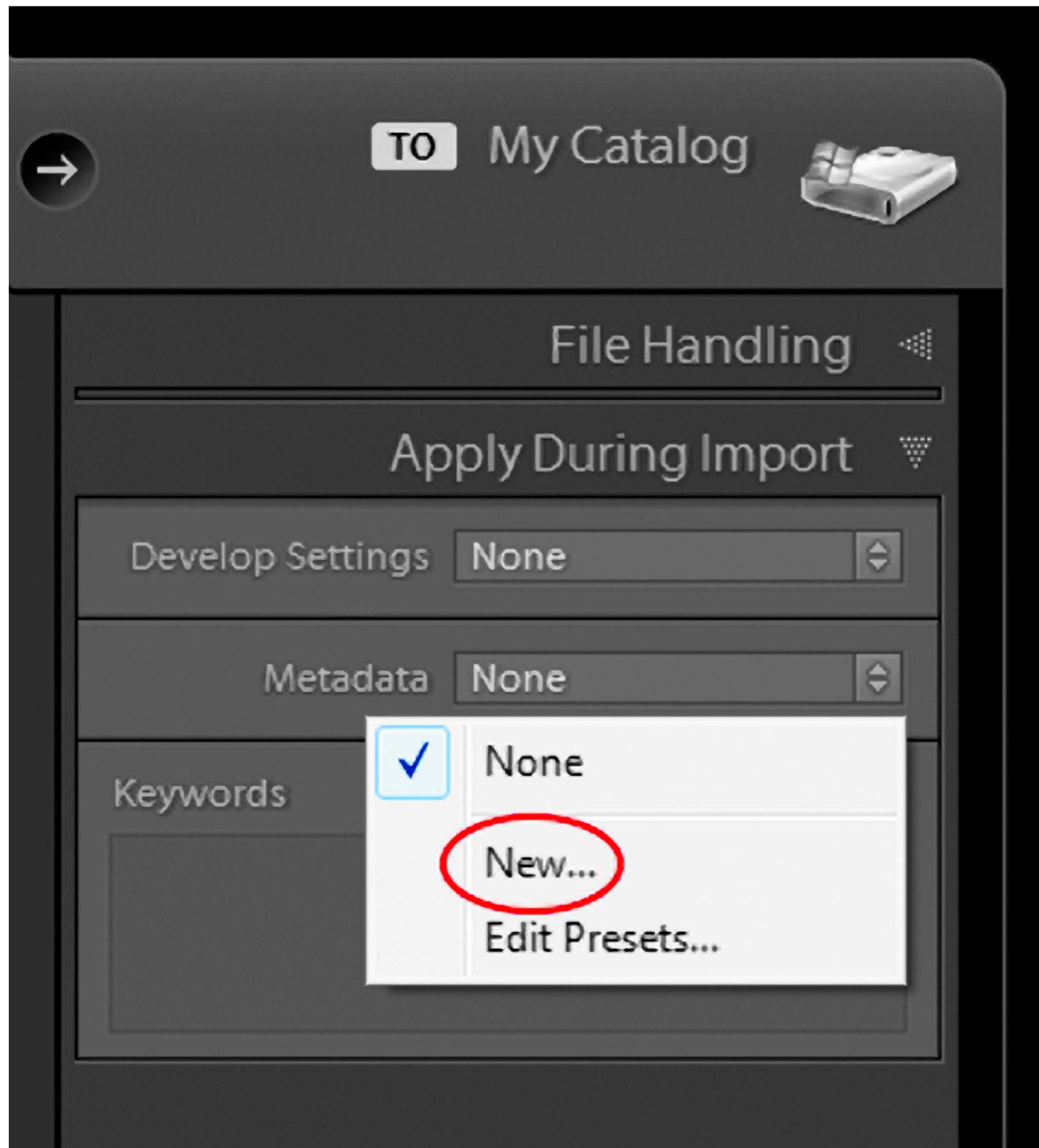


Screenshot by Rob Eyers

## IMPORTING PHOTOGRAPHS

With a new catalog and directory created, it's now time to import some photos. Before that, there are a few things to set up which will streamline the import process.

To avoid duplicates while importing, select 'Import' and then on the right side choose **'File Handling'** and check **'Don't Import Suspected Duplicates.'** Lightroom will now prevent any duplicate images from being imported into the ALL PHOTOGRAPHS directory.



While importing photos to the main photo directory, it's a good idea to include some metadata to state who owns them, what the copyrights are, and how to contact you. To do this, click on 'Import' and then on the right side choose 'Apply During Import/Metadata/New' as in the image on the left.

Screenshot by Rob Eyers

New Metadata Preset

Preset Name:

Preset:

**▼ IPTC Copyright**

Copyright

Copyright Status

Rights Usage Terms

Copyright Info URL

**▼ IPTC Creator**

Creator

Creator Address

Creator City

Creator State / Province

Creator Postal Code

Creator Country

Creator Phone

Creator E-Mail

Creator Website

Creator Job Title

**▼ IPTC Image**

Date Created

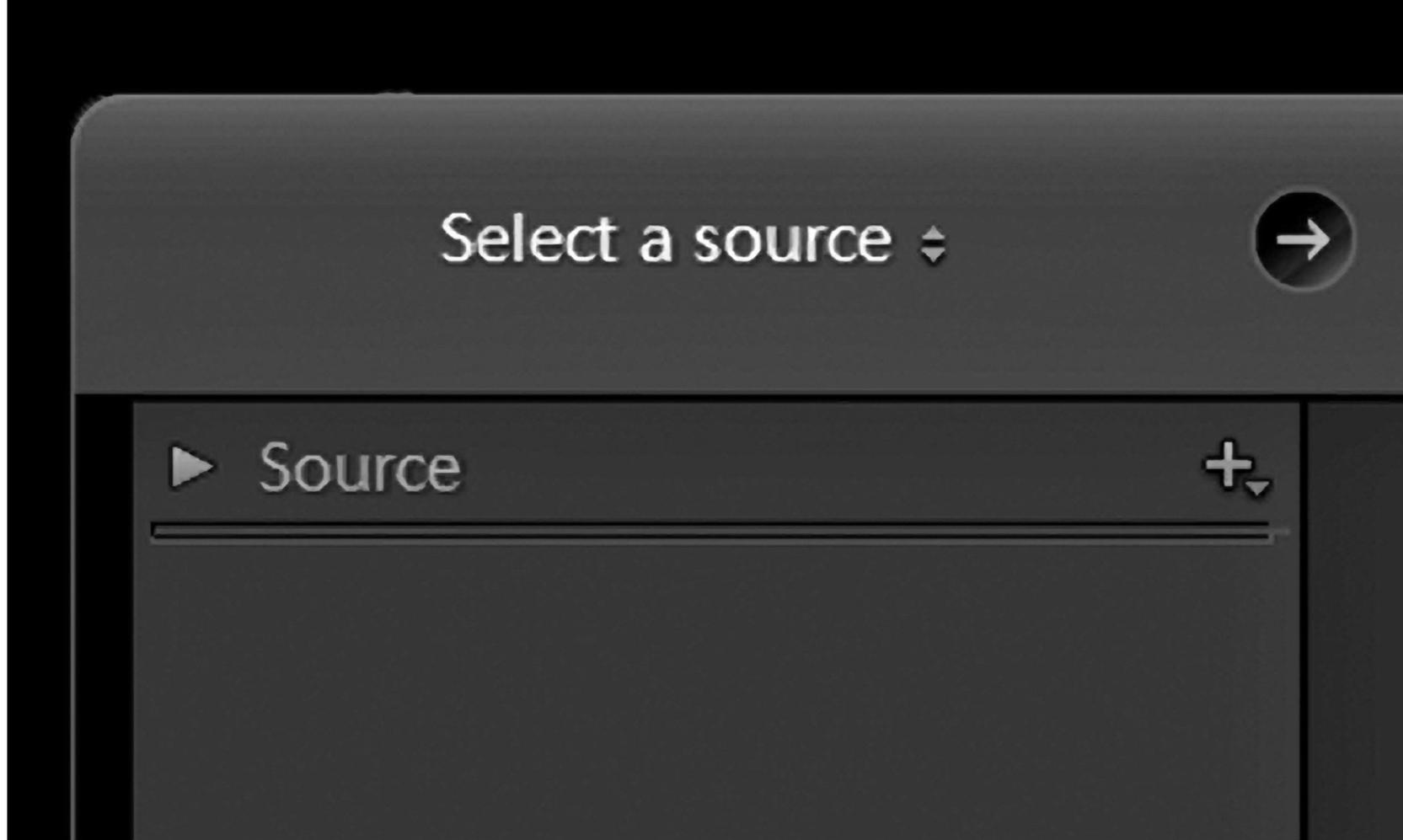
Intellectual Genre

IPTC Scene Code

Sublocation

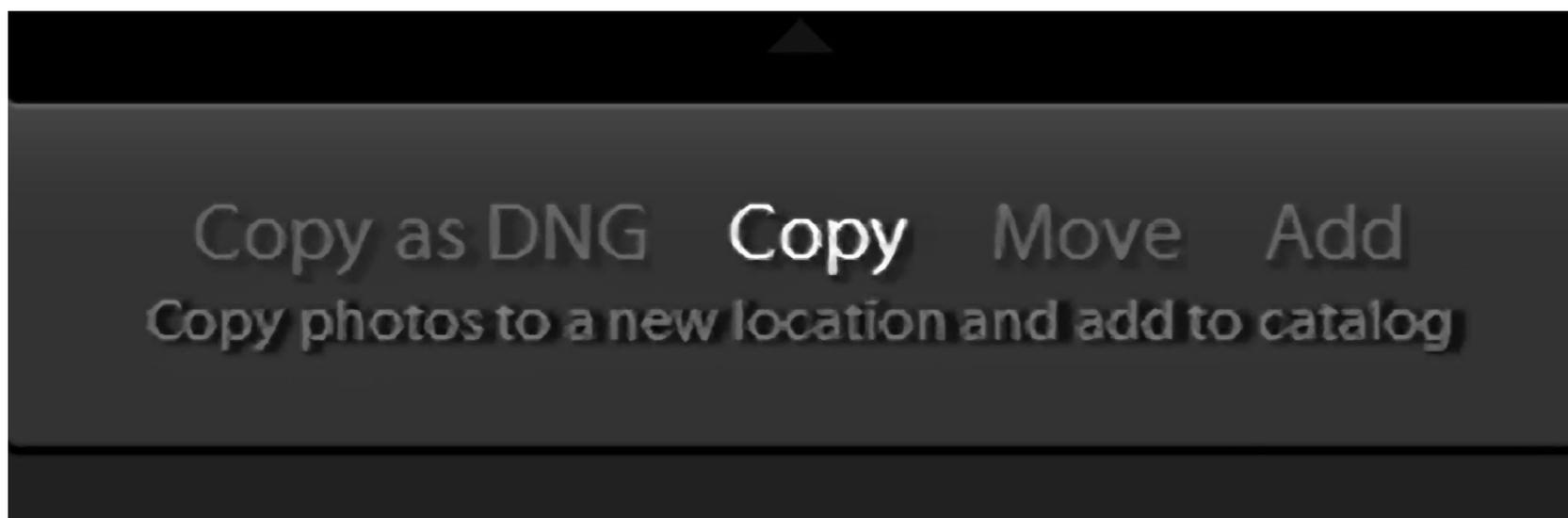
Name the preset appropriately, enter your information as shown in the image on the left, and select 'Create.' Select your new preset in the 'Apply During Import' tab.

Screenshot by Rob Eyers



Screenshot by Rob Eyers

It's now time to import any existing photographs into the new ALL PHOTOGRAPHS directory. Select 'Import' and in the left panel select the location where they're stored.



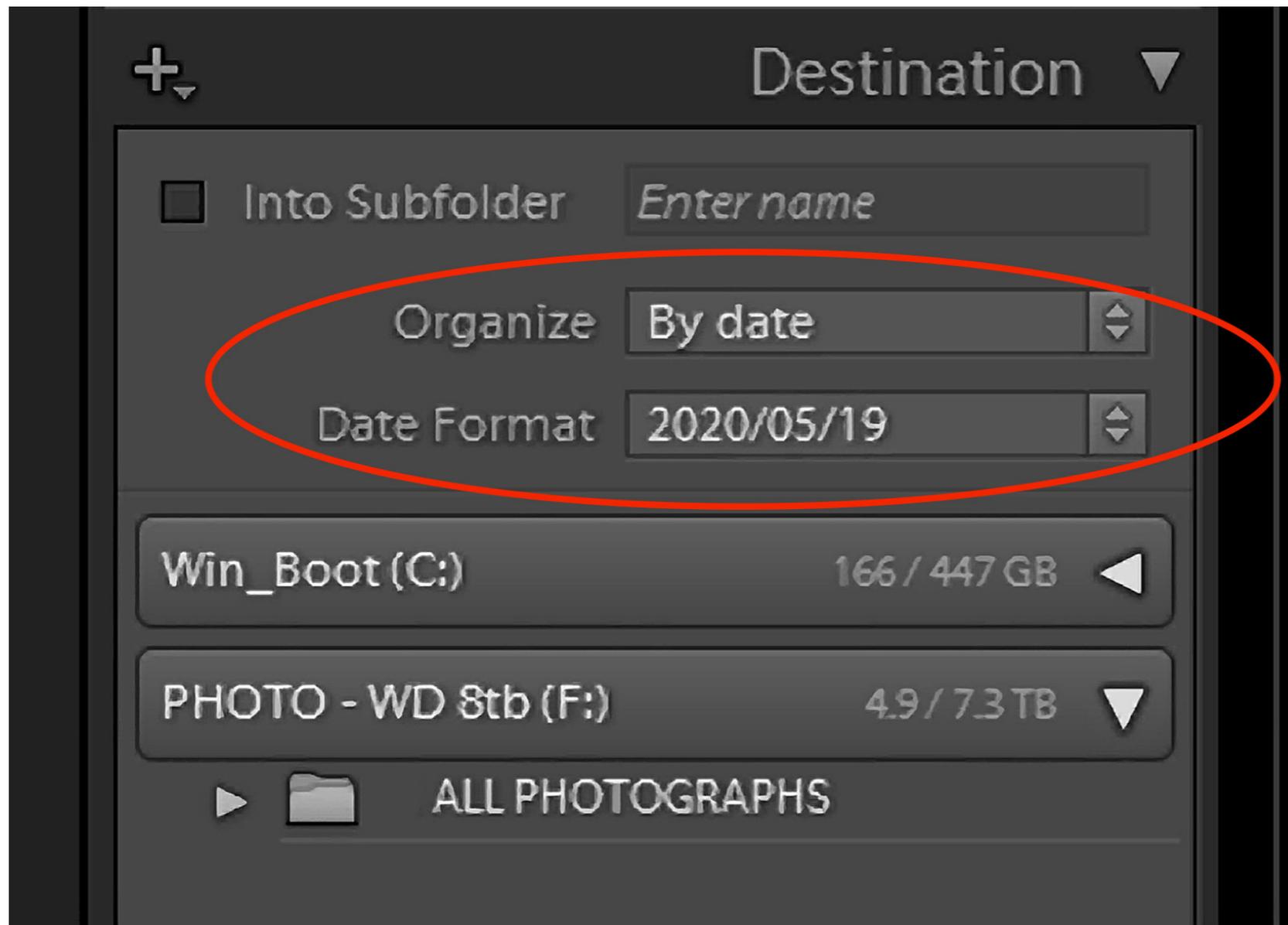
Screenshot by Rob Eyers

In the center top panel, confirm that 'Copy' is highlighted.



Screenshot by Rob Evers

There will now be a 'Destination' panel on the right side. This panel is where the location of the new directory is specified as well as how to organize the photos. Now would also be a good time to confirm that your copyright metadata is selected.



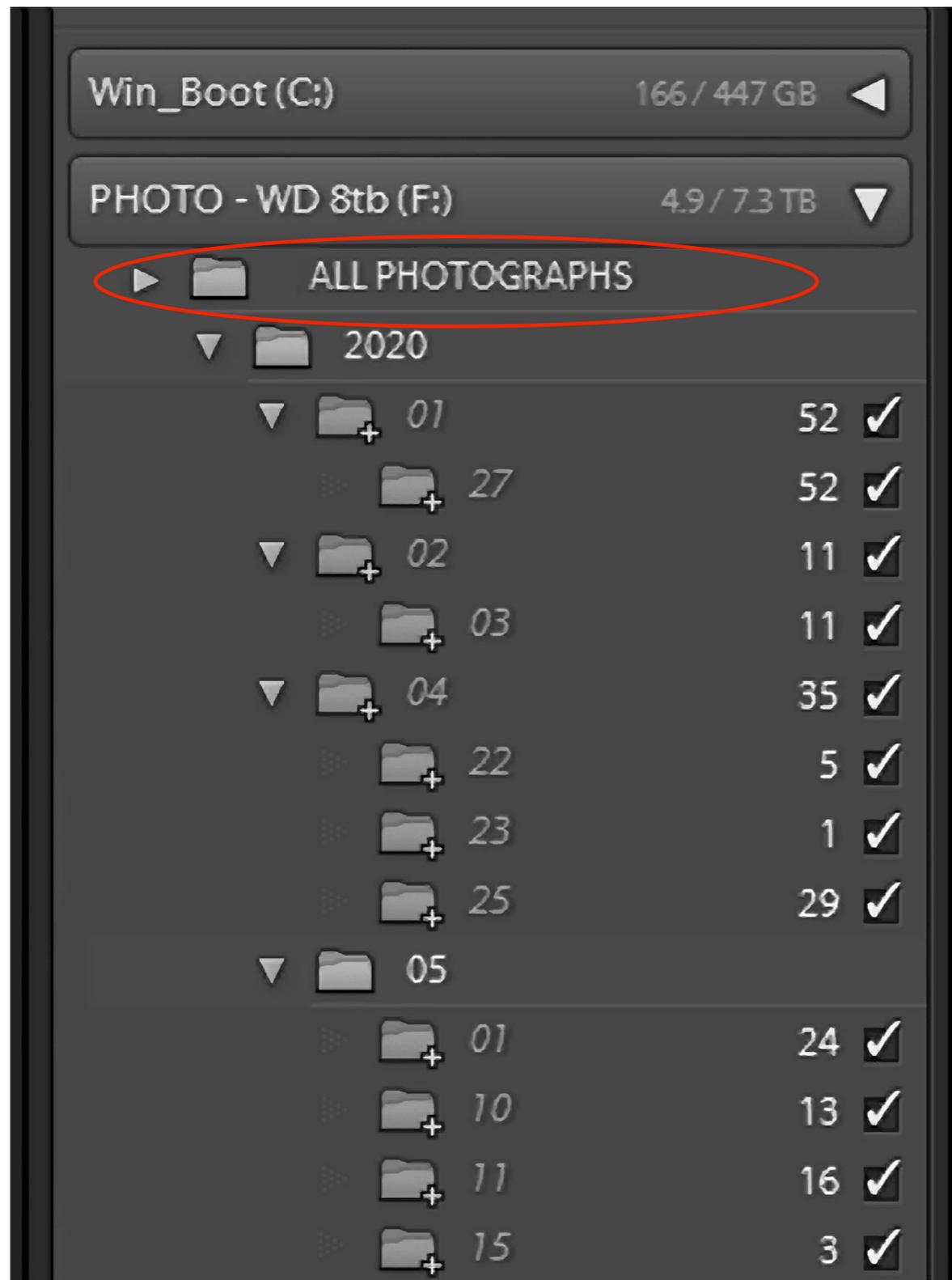
Screenshot by Rob Evers

At the top of the 'Destination' tab, select 'Organize: By Date' and then choose 'Date Format: Year/Month/Day.' All of the photos to be imported have one thing in common, which is that they all have a time stamp. The subject matter or location may be different for each and every one, but they all have time data.

If the import process is going to be simple and repeatable, there has to be a common denominator. The goal is to eliminate decision-making during import. Since the import settings will remain the same if they're not changed, all future imports will be quick and easy.

 **Key Lesson:** Check your camera's clock to make sure it's set correctly because each photo's date and time is the best way to organize them.

 **Recommended Reading:** If you want to learn how to enhance your photos and create better images, grab a copy of Photzy's premium guide: [Ultimate Guide to Fundamental Editing](#).



Screenshot by Rob Evers

Next, choose the 'ALL PHOTOGRAPHS' directory in the 'Destination' tab. The 'ALL PHOTOGRAPHS' directory will now show the year, month, and day for each image being imported. From this point on, all photos will be imported in the same manner. To finish the procedure, click on 'Import.'

Continue importing the rest of your photographs. It doesn't matter if they are scattered over many directories on multiple drives. They will all be imported into the one catalog and saved by the date they were taken. After they're all imported, they'll show up under the 'Folders' tab on the left side in the 'ALL PHOTOGRAPHS' directory.

So, how can a specific image be found if there's only one directory and catalog?

## FINDING A PHOTO

When thinking about any particular subject, the 4 Ws (Who, What, Where, When) can pretty much describe it. The 4 Ws can be used to describe photos, too. The When has already been taken care of during import, so that leaves Who, What, and Where.

In thinking about any given photo, it usually contains one main thing that's significant about it. That might be where it was taken, what it's about, or who is in it. In some cases, there may be more than one thing that describes an image; however, it can only be imported to one directory.

Photos of a trip would have to be imported into a different directory than ones of a given person. The result would be multiple directories for different locations, people, or events. As a result, importing photos would be an arduous decision-making process. Trying to remember where a given photo

was imported at a later date would also be difficult, especially if it contained more than one thing of significance. This scheme would make it difficult to remember where it was imported.

This is where keywords have a major advantage. Any given photo can have several keywords that describe it. An image could have a keyword for its location, and one for the event, or another for who is in it. This versatility is one of the most powerful aspects of the keyword function. Once keywords are assigned, any or all of them can be used to locate a photograph which resides in a single organized directory and catalog.

 **Key Lesson:** Keywords make it easy to locate any photograph in a Catalog.

## SETTING UP KEYWORDS

The general concept of keywords is to create main and subcategories to refine the subject. An example of the keyword “Ice Fields Parkway” could look like this:

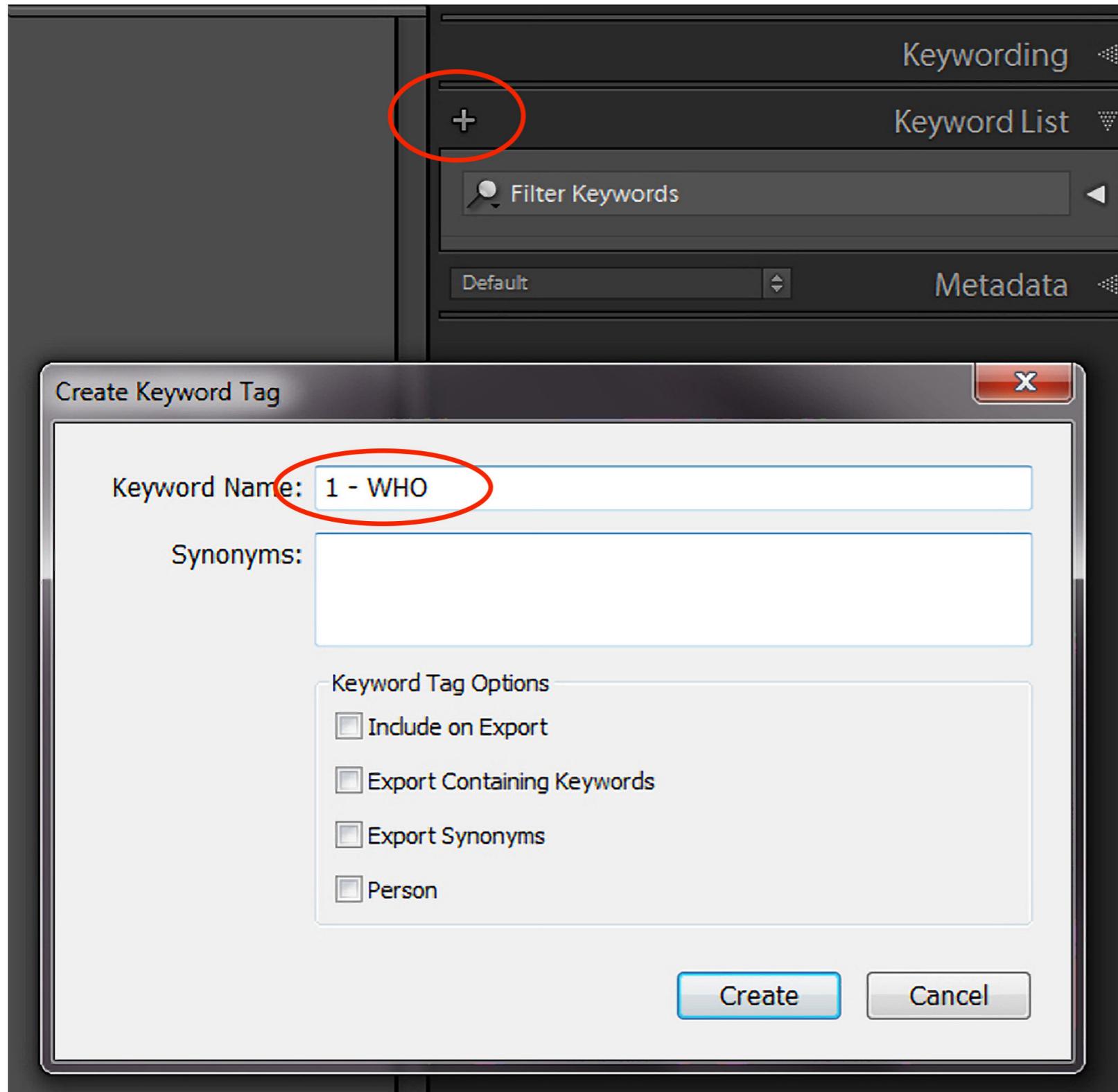
### WHERE

- North America
  - Canada
    - Alberta
      - The Rockies
        - Ice Fields Parkway

In this example, the photo assigned the “Ice Fields Parkway” keyword would also show up in a search for any of the other keywords preceding it, like Alberta or North America.

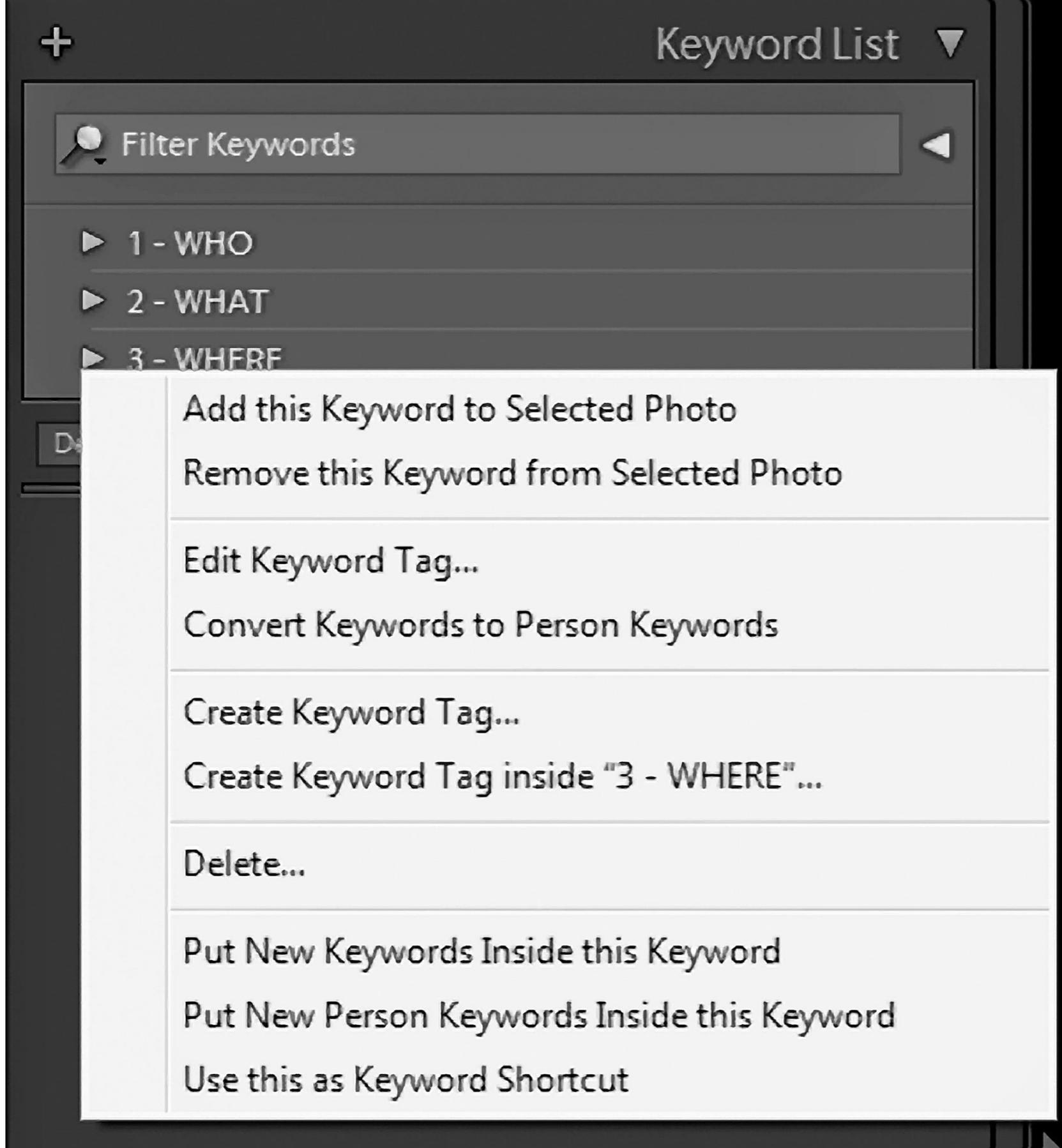
Let’s say there was a Canadian Goose in the photo too. The photo could also be assigned a keyword under WHAT - Wildlife - Bird - Canadian Goose. There could also be people in the photo and they, too, could be assigned keywords. The possibilities are many and totally your decision.

 **Key Lesson:** Any photo can be assigned one or more keywords.



To begin setting up keywords, my suggestion is to start with three main categories: Who, What, and Where. To create them, click on the plus sign in the 'Keyword List' tab, enter the title, clear all the check marks as in the image on the left, and then click on 'Create.'

Screenshot by Rob Evers



To create sub-keywords, right-click on the main keyword and choose to 'Create a Keyword Tag' inside that specific keyword heading. This time don't clear the check marks. Make as many sub-keywords as required.

Screenshot by Rob Eyers

## ASSIGNING KEYWORDS

Once keywords are created, they can be assigned to an image in any of the following ways:

- Select one or more images and then click on the small box that appears to the left of the appropriate keyword when it's hovered over.
- Select one or more images and drag one of them to the keyword.
- Select one or more images and drag the keyword to one of them.
- Type Ctrl (Cmd on Mac) and the K key to access the keyword entry box. Begin typing the keyword of choice and then select the correct one from the drop-down menu.

 **Key Lesson:** When assigning a keyword, all of the keywords above it are also assigned. For example, assigning the keyword 'Alberta' to an image as in the previous example would also assign the keywords WHERE, 'North America,' and 'Canada' to it as well.

 **Recommended Reading:** If you want to learn how to enhance your photos and create better images, grab a copy of Photzy's premium guide: [Ultimate Guide to Fundamental Editing](#).

# Lightroom



Screenshot by Rob Eyers

## HOW TO SEARCH WITH KEYWORDS

In order to search through the catalog, it must first be selected as in the image on the left.



Screenshot by Rob Eyers

Then select 'Metadata' in the center panel at the top.

Library Filter :				Text	Attribute	Metadata	None	Custom Filter ↕	
Keyword		Date		Camera		ISO Speed			
All (3 Keywords)	82436	▷ 2012	608	All (10 Cameras)	21169	ISO 101		40	
None	52483	▷ 2013	279	Canon EOS 5D Mark IV	10366	ISO 102		1	
▷ 01 - WHO		▷ 2014	4739	Canon EOS 6D	3876	ISO 103		2	
▷ 02 - WHAT		▷ 2015	1309	Canon EOS 7D	3038	ISO 104		1	
▶ 03 - WHERE		▷ 2016	2734			ISO 106		39	

Screenshot by Rob Eyers

A drop-down menu appears with four search fields. Each of the fields has a drop-down menu with multiple search criteria. Choose 'Keyword' as one of the sorting criteria. All of the keywords that have been assigned will be available in the drop-down menu. Choose a keyword and the grid will populate with all of the photos that have that keyword assigned to them.

By choosing additional search criteria in any of the other fields, the search can be refined. However, if the search needs to be narrowed down by more than one keyword, then an additional method must be employed. To do this, select 'Text' to the left of

'Metadata' and type all of the keywords you want to search in the text field.

 **Key Lesson:** A keyword in the drop-down menu can also be used with the Text option. This only works if a keyword is first chosen in the keyword field before selecting the Text option.

Lightroom has one more powerful tool to use for sorting your images, which is called 'Collections.' It enables the user to further narrow their search within keywords plus additional criteria. 'Collections' can be a very useful tool that I would encourage you to explore.

## SUMMING IT UP

It may take a little while to keyword a back catalog of photographs; however, the results are well worth the effort. Once it's done, you'll reap the benefits of finding any image quickly, saving valuable time. Importing photos will now be fast and easy which will leave more time for more important things like taking pictures and editing.



# Hey there!

Let's get real for a minute... Learning photography can be super challenging! But we're here to help you every step of the way! Here are 3 of our most useful (*and FREE!*) photography resources:



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## ABOUT THE AUTHOR



Rob Eyers is a retired Canadian business owner and musician. These days photography, music, and travel keep him busy. His interest in photography began in the 1960's. Rob is certified by the Imaging Science Foundation and as such, he is highly interested in colour accuracy for both video and photo processing.

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