



SLIM Companion™ Email Manager

User Guide

This document provides an overview of the functionality provided by SLIM Companion Email Manager 1.2

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1. Introduction

SLIM Companion™ Email Manager increases user productivity and provides unique functionality to simplify your work. Upload emails using drag and drop, preview emails, attach SharePoint documents to emails and more...

This document describes the key features for using the add-in. More detailed information about the functionality offered and the technical specifications is available on <http://www.slimapplications.com/>.

Throughout this document SharePoint is used to refer to SharePoint Online (Office 365), SharePoint 2013 and SharePoint 2016. The assumption is made that the add-in has already been installed by a SharePoint Administrator or user with permissions to install add-ins.

2. Getting started

2.1 Open SLIM Companion Email Manager

The SLIM Companion Email Manager add-in is accessible through the ribbon and through the ellipsis menu. In the modern view the SLIM Companion Email Manager section is directly visible.

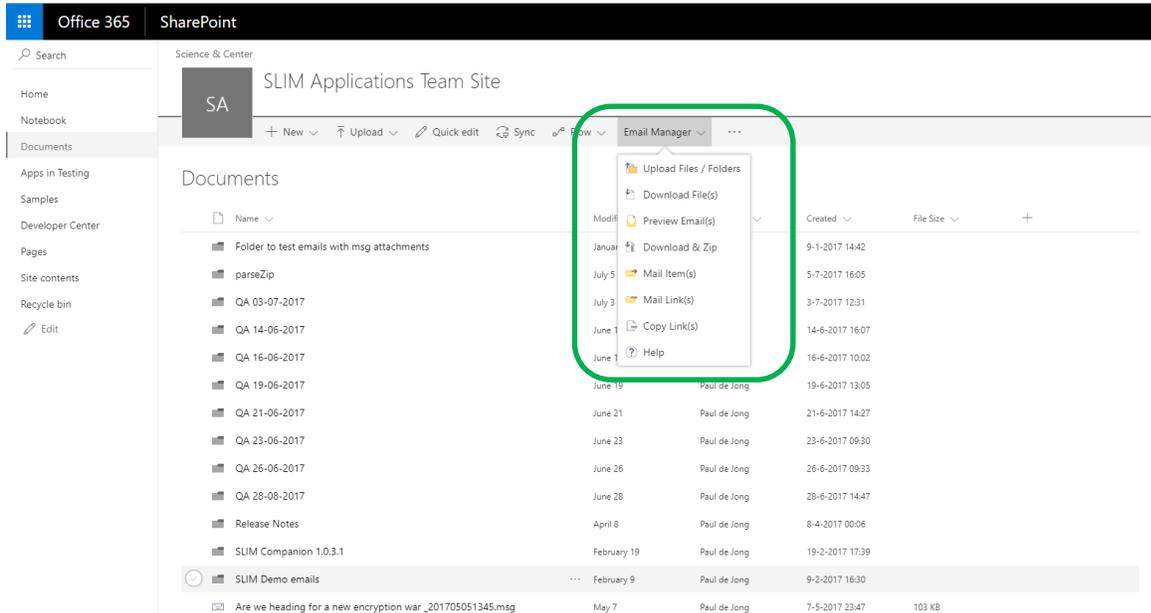


Figure 1. SLIM Companion Email Manager in a document library using the Modern view. The SLIM Companion Email Manager section in the ribbon is marked in green.

In the classic view the SLIM Companion Email Manager section is present under the Library tab.

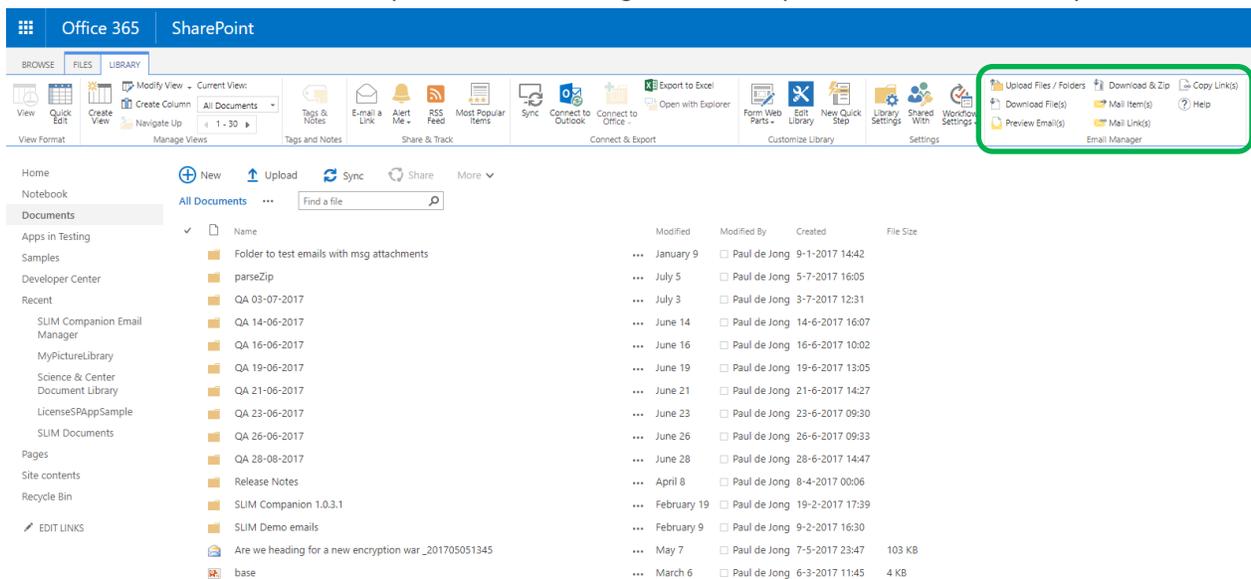


Figure 2. SLIM Companion Email Manager in a document library using the Classic view. The SLIM Companion Email Manager section in the ribbon is marked in green.

Part of the SLIM Companion Email Manager functionalities are also available under the ellipsis menu. For example, for a document the options (Mail Item, Copy Link and Mail Link) are shown.

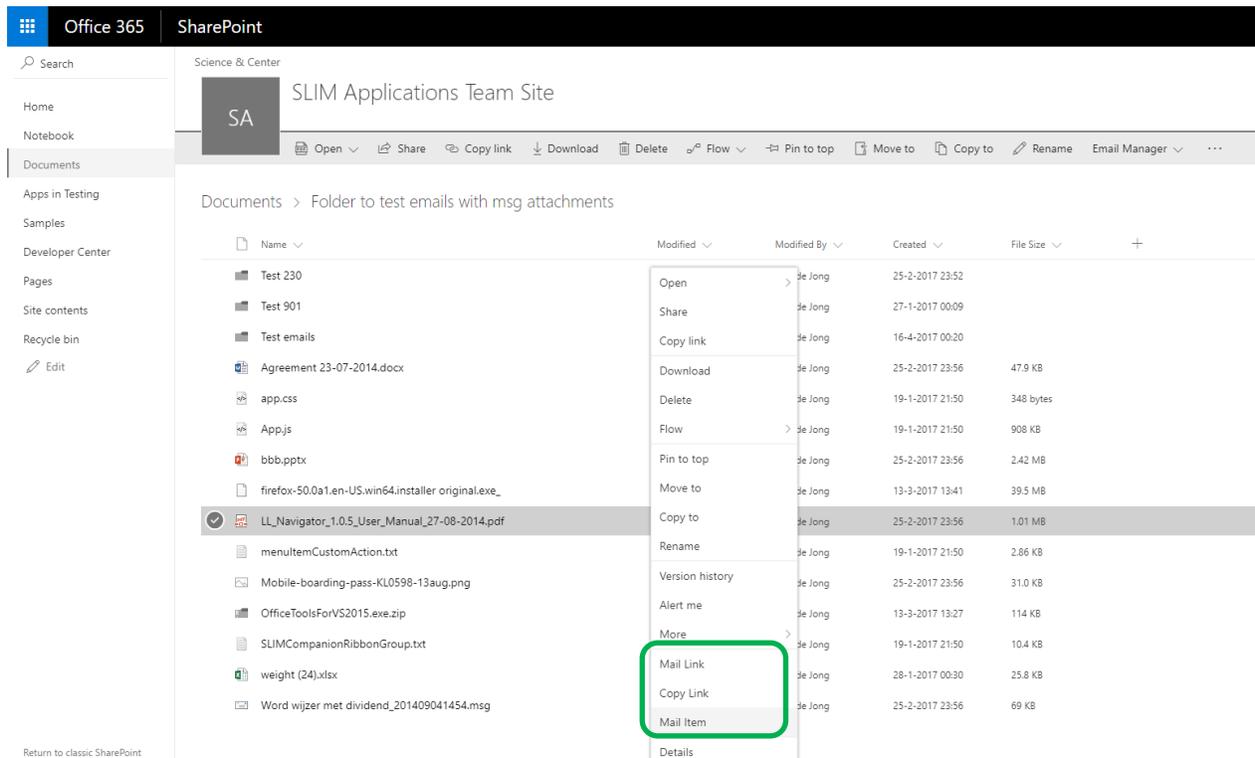


Figure 3. SLIM Companion Email Manager additional options (marked in green) in the ellipsis menu of a document.

The options differ by type and the details are listed in table 1.

Type	Additional options available in the ellipsis menu
Document	Mail Item, Mail Link and Copy Link
Email ¹	Mail Item, Mail Link, Copy Link and Preview Email
Folder	Upload Files / Folders, Download & Zip, Mail Link and Copy Link
Document Set	Upload Files / Folders, Download & Zip, Mail Link and Copy Link

Table 1. SLIM Companion Email Manager options in the ellipsis menu for several types.

¹ An email is a document with the extension msg or eml.

3. SLIM Companion Email Manager features

In this section the options offered by the add-in are presented. The examples shown use buttons in the ribbon but the option in the ellipsis menu behaves in the same way. Both open a separate page because the SharePoint add-in model does not allow the use of JavaScript in native SharePoint pages. The opened SLIM Companion Email Manager page contains a link to return to the previous page.

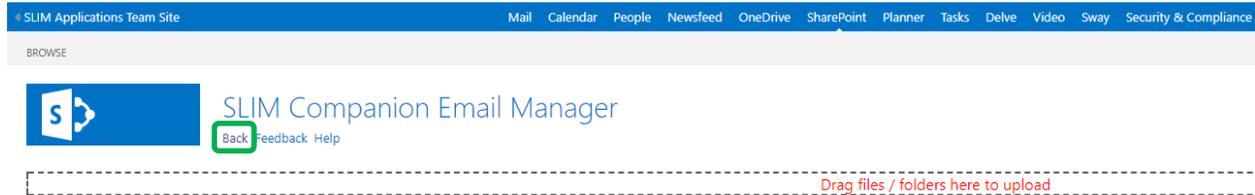


Figure 4. SLIM Companion Email Manager. The back button is marked in green.

3.1 Upload Files / Folders

Chrome, Opera and Edge support uploading folder structures. To upload multiple files or folders click on the “Upload Files / Folders” button in the ribbon to open the SLIM Companion Email Manager page.

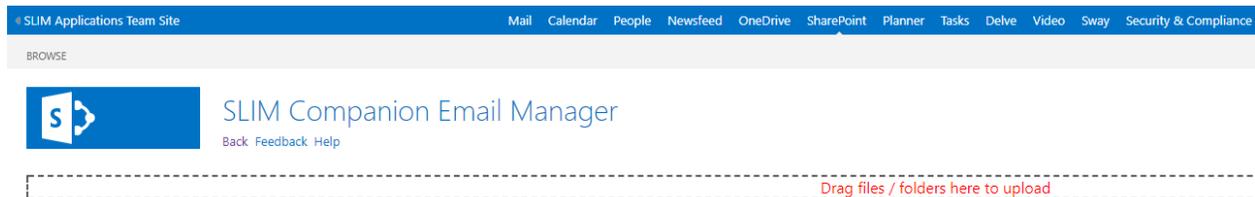


Figure 5. SLIM Companion Email Manager add-in after clicking “Upload Files / Folders” in the ribbon.

Open Windows Explorer (or Finder on OS X) and drag multiple documents and / or folders into the area marked “Drop files / folders to upload”. This then shows the selected items in a tree like structure.

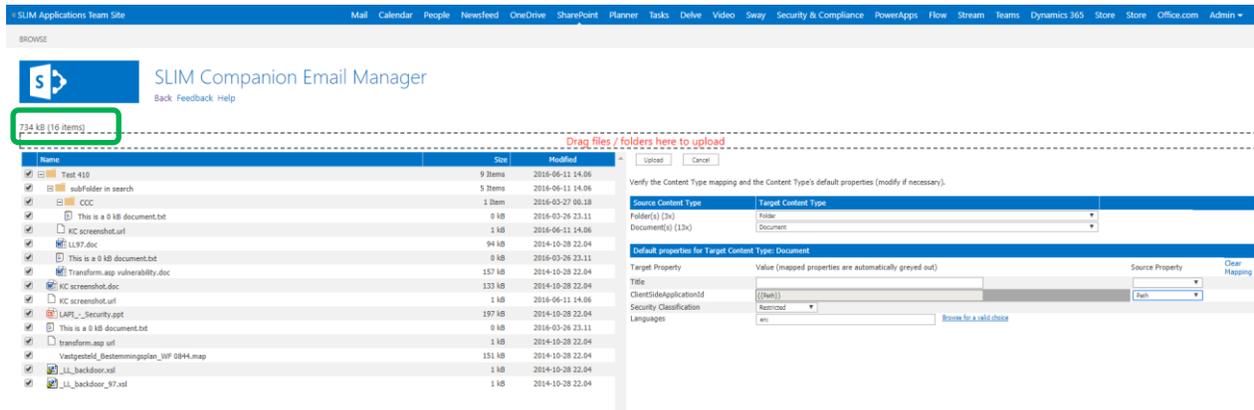


Figure 6. SLIM Companion Email Manager after selecting a folder structure using drag and drop. The number of selected items and data volume are marked in green.

The add-in will automatically map documents to the content type “Documents” and folders to the content type “Folders”.

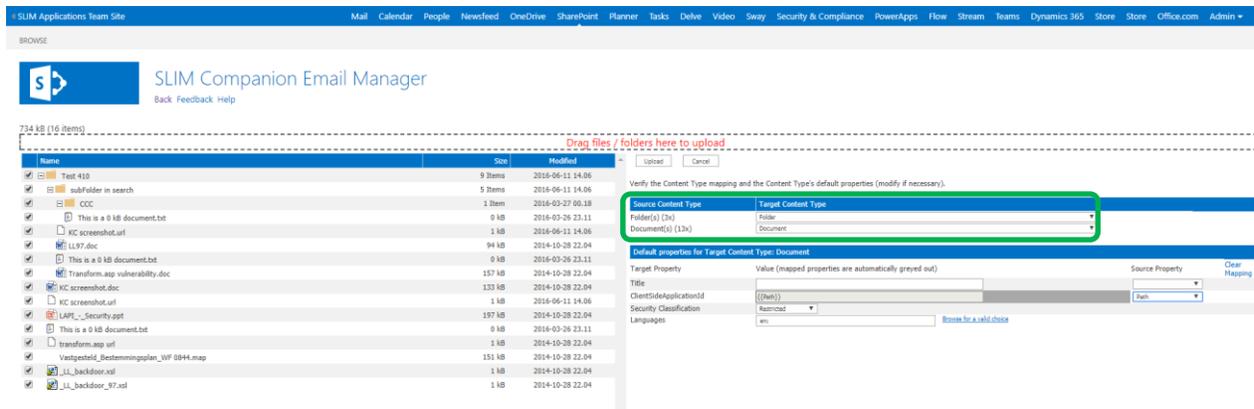


Figure 8. SLIM Companion Email Manager after selecting a folder structure. The default mapping is marked in green.

When the user browser is Internet Explorer or FireFox there is no support for uploading folders. The SLIM Companion Email Manager page indicates that only files can be uploaded.

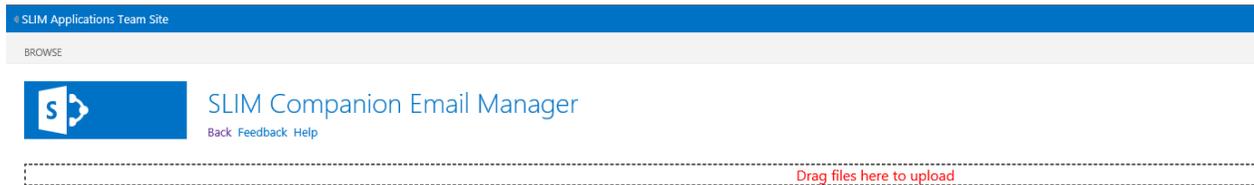


Figure 7. SLIM Companion Email Manager in Internet Explorer 11. The drag area shows the text “Drag files here to upload”.

To initiate the uploading click the “Upload” button.

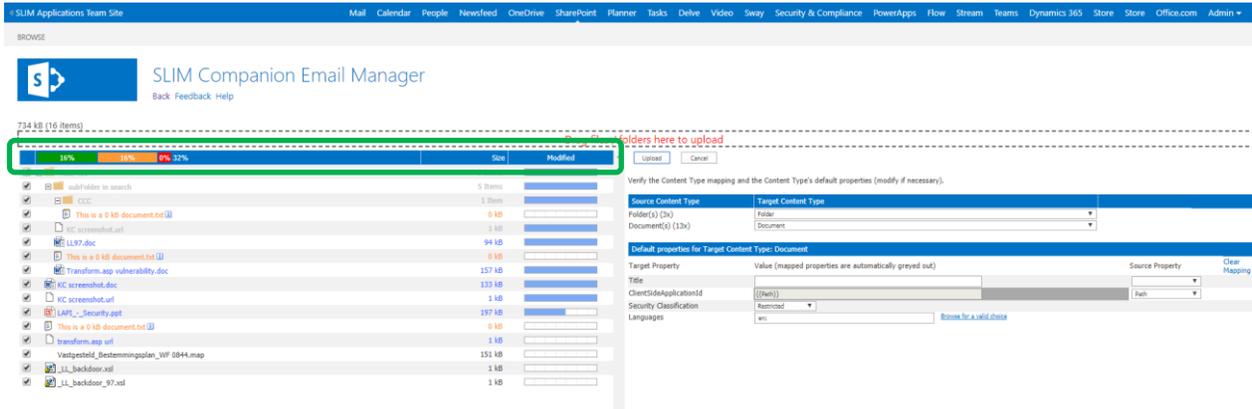


Figure 9. SLIM Companion Email Manager during uploading of a folder structure. The overall progress bar is marked in green.

The completed items are greyed out and the individual progress bar indicates the item has been uploaded. The red-amber-green progress displays the overall progress:

- green stands for successful
- amber indicates the upload was skipped
- red indicates the upload has failed.

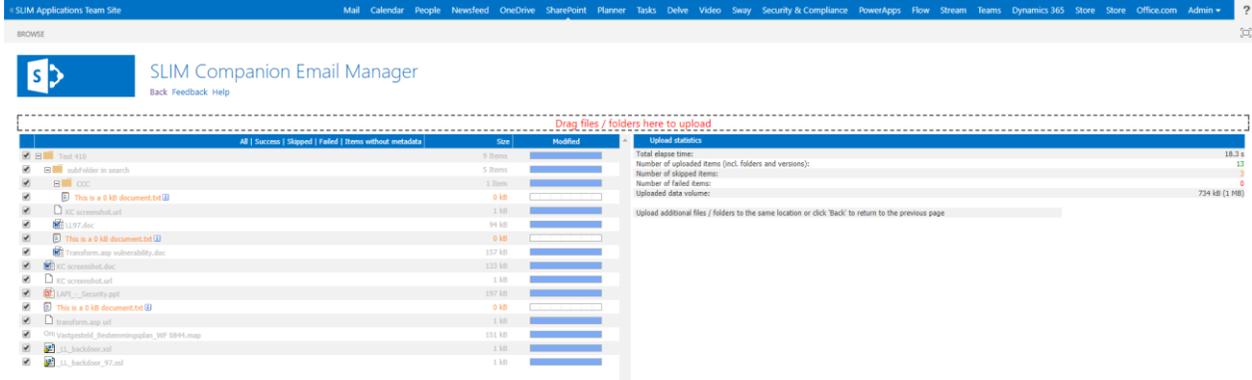


Figure 10. SLIM Companion Email Manager after uploading a folder structure. The upload statistics are shown in the right hand pane.

In the above example there are 3 items marked in amber. The  icon adjacent to the item name provides detailed information why the item was skipped.

All Success Skipped Failed Items without metadata			Size	Modified
<input checked="" type="checkbox"/>	Test 410		9 Items	
<input checked="" type="checkbox"/>	subFolder in search		5 Items	
<input checked="" type="checkbox"/>	CCC		1 Item	
<input checked="" type="checkbox"/>	This is a 0 kB document.txt		0 kB	
<input checked="" type="checkbox"/>	KC screenshot.url	The file has size 0 kB. This file will be skipped.	1 kB	
<input checked="" type="checkbox"/>	LL97.doc		94 kB	
<input checked="" type="checkbox"/>	This is a 0 kB document.txt		0 kB	
<input checked="" type="checkbox"/>	Transform.asp vulnerability.doc		157 kB	

Figure 11. SLIM Companion Email Manager with a skipped item because of the 0 kB size.

Note: by hovering the mouse over an icon the original document size and the document size after uploading are shown.

All Success Skipped Failed Items without metadata			Size	Modified
<input checked="" type="checkbox"/>	Test 410		9 Items	
<input checked="" type="checkbox"/>	subFolder in search		5 Items	
<input checked="" type="checkbox"/>	CCC		1 Item	
<input checked="" type="checkbox"/>	This is a 0 kB document.txt		0 kB	
<input checked="" type="checkbox"/>	KC screenshot.url		1 kB	
<input checked="" type="checkbox"/>	LL97.doc		94 kB	
<input checked="" type="checkbox"/>	Original size: 95744 B / SharePoint size: 110080 B		0 kB	
<input checked="" type="checkbox"/>	Transform.asp vulnerability.doc		157 kB	
<input checked="" type="checkbox"/>	KC screenshot.doc		133 kB	

Figure 12. Original and uploaded file sizes

Please note that Microsoft Office and msg files will increase in size (typically 7-14 kB) after uploading to SharePoint. This is standard SharePoint behavior and is not caused by SLIM Companion Email Manager.

3.1.1 Automatically fix potential upload problems

SharePoint imposes restrictions on the use of special characters, item names, URL lengths and specific file types. SLIM Companion Email Manager automatically caters for the following potential upload problems:

Potential problem	SLIM Companion Email Manager behavior	Example
Illegal characters	Replace by Unicode character	# is replaced by \u0023
Blocked files	Places the blocked file in a zip file	Test.bat becomes Test.bat.zip
Long item name	Truncate the name	Long..namexyz.docx becomes Long..name.docx (i.e. keep the extension)
Long URLs	Warn user prior to uploading about URLs exceeding 260 characters	
0 kB files	Inform the user that 0 kB files are skipped	
Very large files (GBs)	SharePoint Online + SharePoint 2016: upload files in chunks SharePoint 2013: only upload files if the size is less than the browser's threshold	

Table 2. Overview of SLIM Companion Email Manager capabilities to fix potential problems.

3.1.2 Custom metadata

Users can also map the documents and folders to custom content types containing custom metadata. In the example below documents are mapped to a custom content type named SLIM Document.

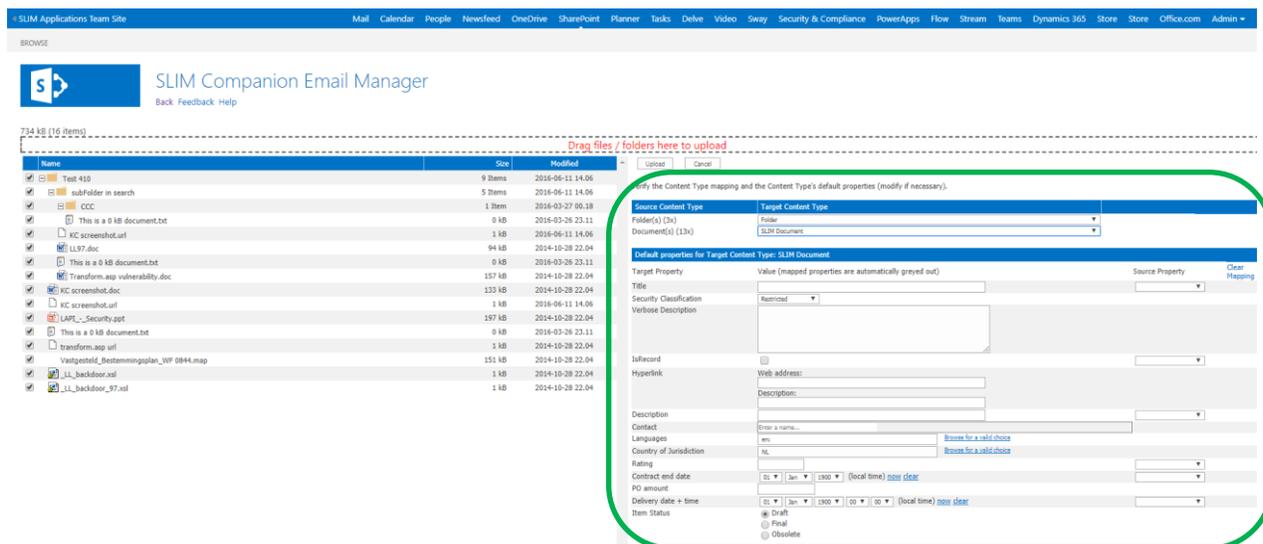


Figure 13. SLIM Companion Email Manager with a mapped content type (marked in green).

The supported column types are listed in section 4.5. The date fields contain a link “now” to set the date/time. The link “clear” resets the date to the original value.

3.1.3 Map source properties

It is possible to capture the original source properties into SharePoint columns. SLIM Companion Email Manager supports the following source properties:

- modification date
- path
- name

The modification date can only be mapped to a column of type “date”. The path and name properties can only be mapped to a column of type “single line of text”. The size of the original item, the original item’s creation date and creator are not available.

The link “Clear Mapping” clears the mappings for the source properties that have been set by the user.

3.1.4 Flatten folder structures

The tool allows users to upload content and flatten the folder structure. Simply map folders to the option “Skip folders and flatten folder structure”.

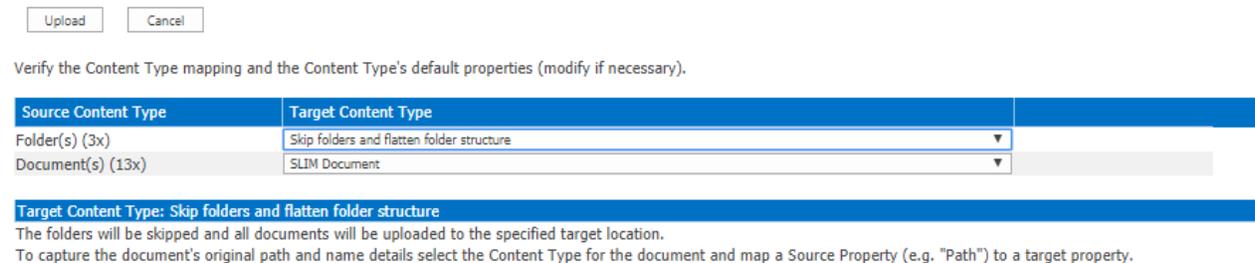


Figure 14. Dialog window where folders are skipped.

Documents are uploaded by appending a unique string into the original name. For example, document.docx is uploaded as document_0123456789.docx to avoid overwriting this document by a document from a different folder that has the same source name.

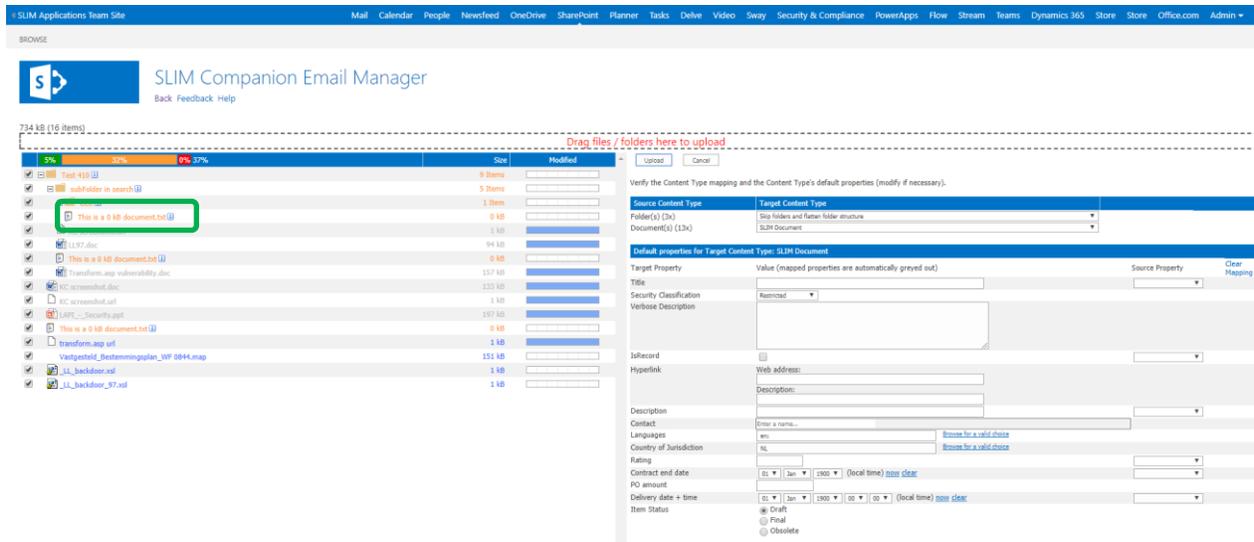


Figure 15. Folders are marked as skipped when using the option to flatten folder structures.

Name	Modified	Modified By	Created	File Size
KC screenshot_2122714105	May 7	Paul de Jong	7-5-2017 23:40	148 KB

Figure 16. Modified document name after flattening a folder structure. The modified part in the document name is marked in green.

Note: it is possible to capture the original path into a SharePoint column by mapping the source property. This then allows for using the original path information for views or filtering. For example,

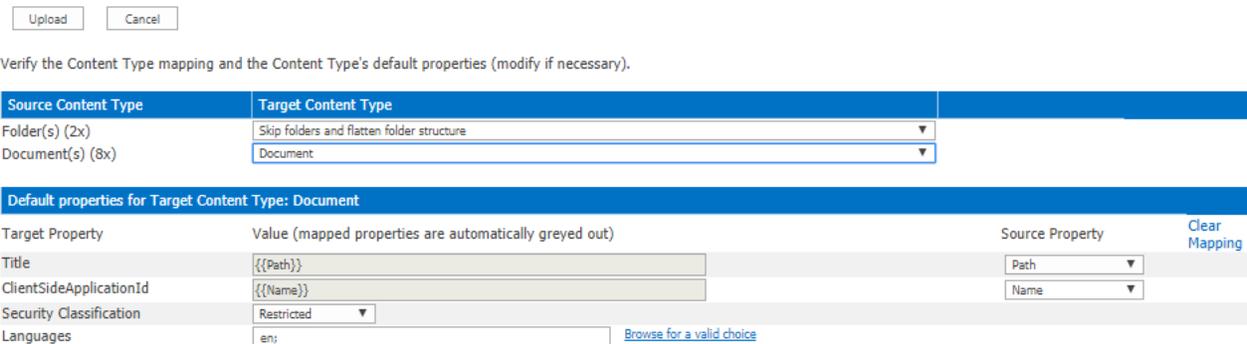


Figure 17. Example of using SLIM Companion Email Manager to flatten a folder structure and map the source path property to the title column in SharePoint.

3.1.5 Uploading emails

In case the upload content contains emails (i.e. documents with extension msg or eml) the user needs to select a content type from the drop-down list. This can be the standard content type “Documents” but it can also be a content type that contains email specific columns. In the example below emails are mapped to a custom content type name “SLIM Email” that contains email specific metadata fields.

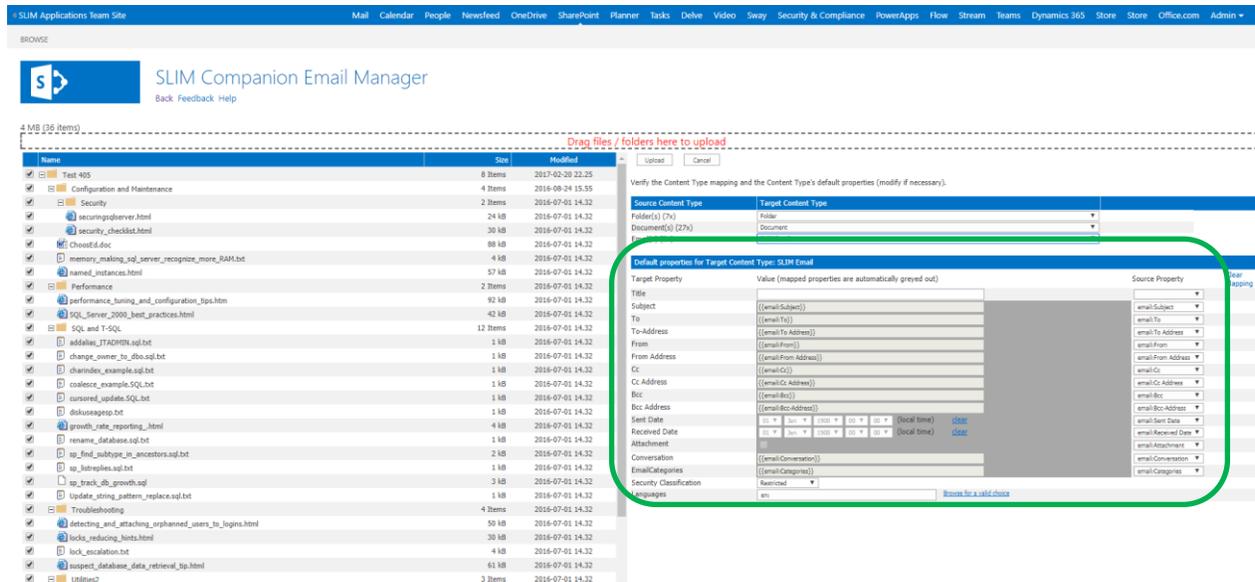


Figure 18. SLIM Companion Email Manager with emails mapped to a custom content type with email specific fields (marked in green).

The fields (e.g. Subject of the email is mapped to the column named “Subject”) are automatically mapped using the details from the SLIM Companion Email Manager configuration list. This is configured by the SharePoint Administrator who has installed the add-in.

Emails are uploaded using unique names. For example, the email mydocument.msg is uploaded as mydocument_0123456789.msg. The unique string is calculated using the subject and the email’s sent date.

To upload emails from Outlook to SharePoint using SLIM Companion Email Manager use the following procedure:

Step 1. Drag emails from your mail client (e.g. Outlook) to the desktop (or any other location on the user’s computer)

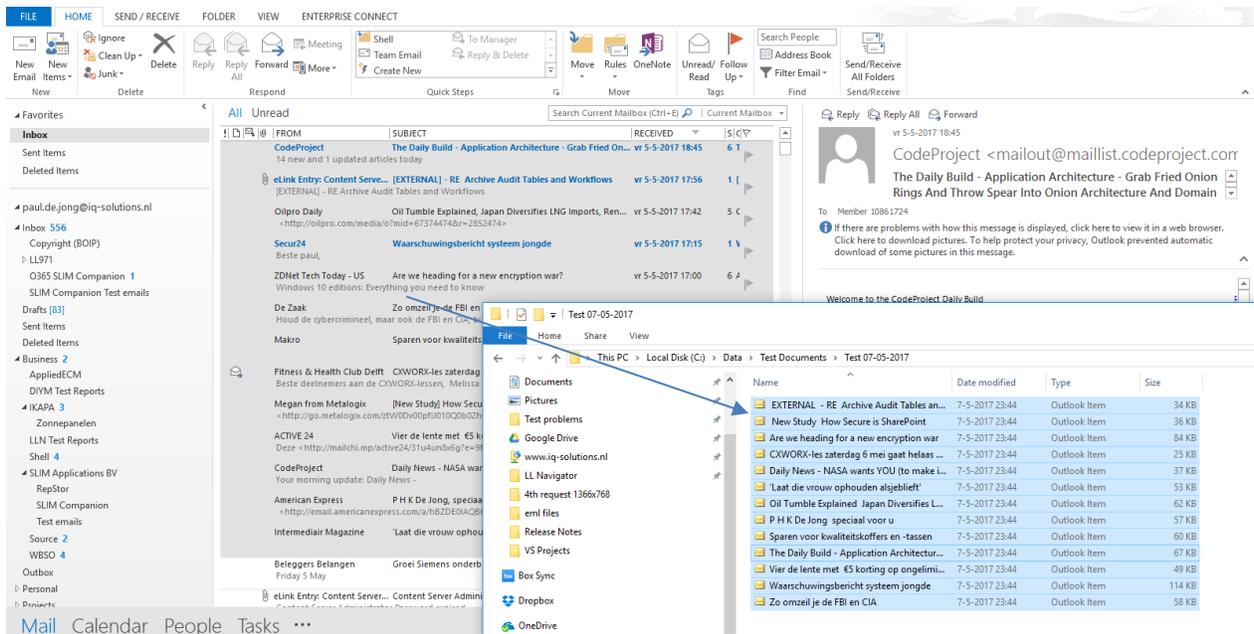


Figure 19. Select one or more emails in Microsoft Outlook and drag the emails to the desktop (or a location on a desktop).

b) Open SLIM Companion Email Manager with the option “Upload Files / Folders” and drag emails from the desktop to the add-in.

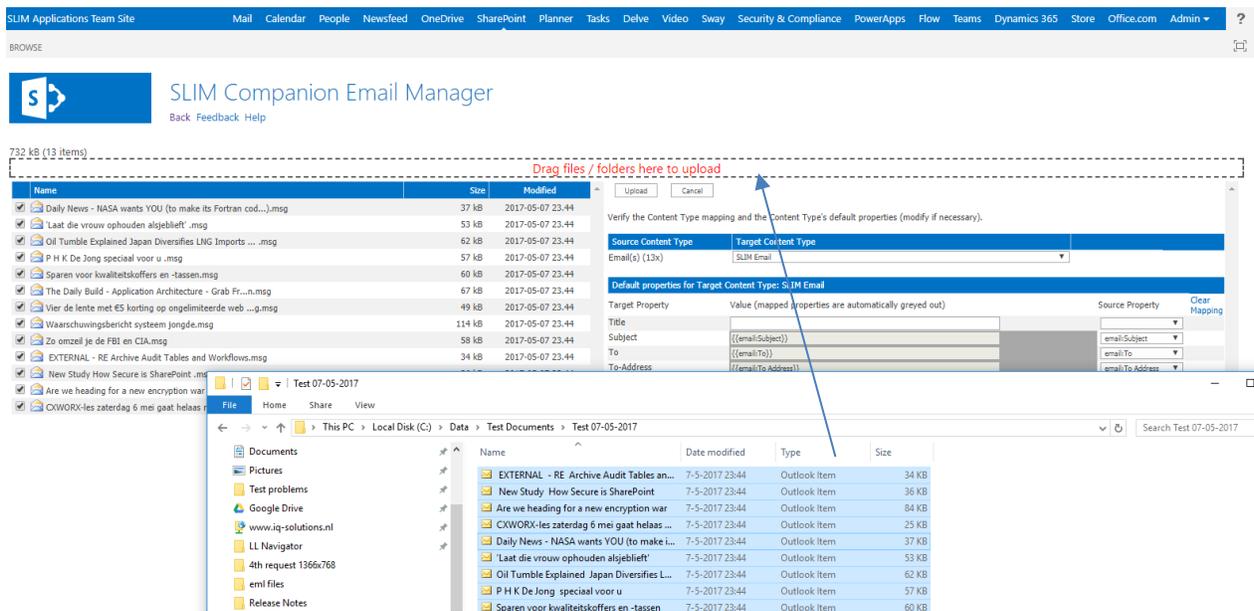


Figure 20. Drag the email from the desktop to SLIM Companion Email Manager.

Select a content type that contains email metadata and click Upload. The tool automatically extracts email metadata and populates the mapped columns. The properties of an uploaded email are shown in the figure below.

The screenshot shows a form for email properties. A green rounded rectangle highlights the following fields: Subject, To, To-Address, From, From Address, Cc, Cc Address, Bcc, Bcc Address, Sent Date, Received Date, Attachment, Conversation, and EmailCategories. Below the highlighted area are fields for Security Classification (set to 'Restricted') and Languages (set to 'en').

Subject	Daily News - NASA wants YOU (to make its Fortran code run faster)
To	Member 10861724
To-Address	paul.de.jong@iq-solutions.nl
From	CodeProject
From Address	mailout@maillist.codeproject.com
Cc	
Cc Address	
Bcc	
Bcc Address	
Sent Date	5-5-2017 10:30
Received Date	5-5-2017 10:30
Attachment	<input type="checkbox"/>
Conversation	Daily News - NASA wants YOU (to make its Fortran code run faster)
EmailCategories	
Security Classification	Restricted
Languages	en

Figure 21. Properties of an email uploaded using SLIM Companion Email Manager. The email metadata fields are marked in green.

3.2 Download Files

Select the checkboxes for one or more files and click the button “Download Files” in the SLIM Companion section. This opens the SLIM Companion Email Manager page which then starts with an inventory of the selected items.

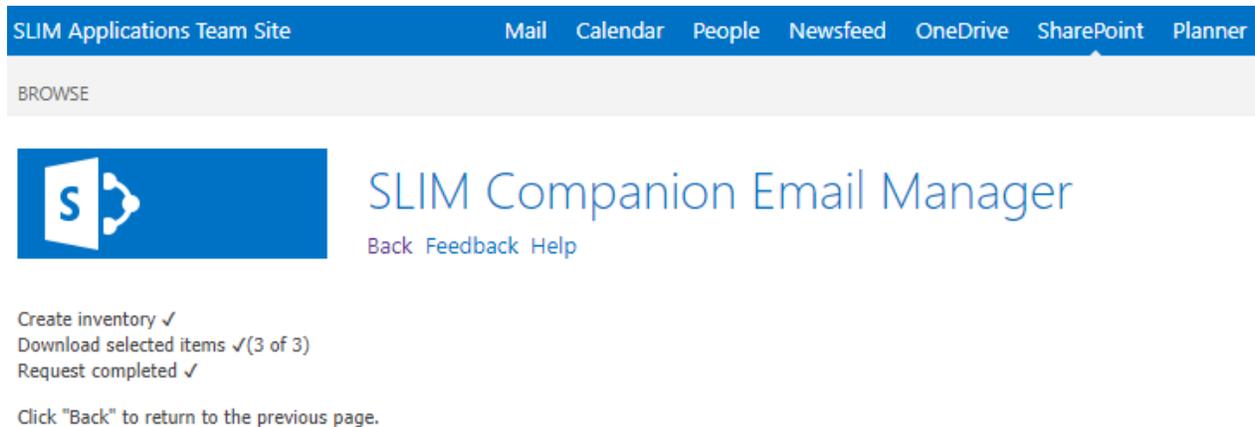


Figure 22. SLIM Companion Email Manager with the option “Download Files”. The files are retrieved using parallel processes and placed in the browser’s download folder. The download folder can be opened using CTRL J.

Note: Chrome and Opera users may see a warning message about downloading multiple files. Click Yes or enable to proceed.

In the SharePoint Modern view the standard SharePoint download automatically places multiple files into a zip. There is no multiple file download capability in the classic view.

SLIM Companion Email Manager add-in allows the user to download the files as individual items. This functionality is available in both the classic and modern view.

3.3 Preview Email(s)

The option to preview emails can be started from the ribbon or an item’s ellipsis. In case the user has selected on or more emails the selected emails will be available for previewing. In case the user has not selected any item then all the emails present in the current folder will be available for previewing.

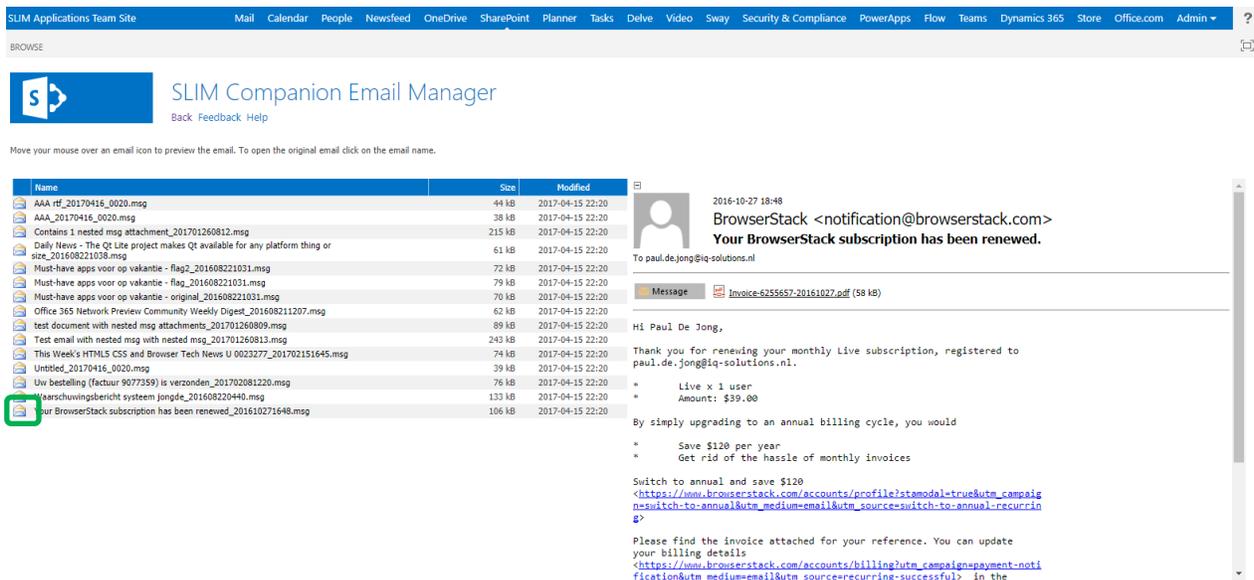


Figure 23. SLIM Companion Email Manager with the Preview Email option.

Hover the mouse over the msg (or eml) icon to display the email in the right hand pane. Attachments in the email preview are shown and are clickable. Links in the emails are shown as hyperlinks to allow users to directly open them. To open the email in your mail client (e.g. Outlook) simply click the item name in the left hand pane.

Note: the previewing does not depend on the presence of Outlook. Hence this can be used to view emails and open attachments on systems without Outlook (e.g. OS X client).

Note: the current version of SLIM Companion Email Manager supports emails in the msg and eml formats.

SLIM Companion Email Manager also caters for emails containing email attachments. The nested email attachments are shown below the original email and only the header of the original email remains visible. Use the + icons to expand an email.

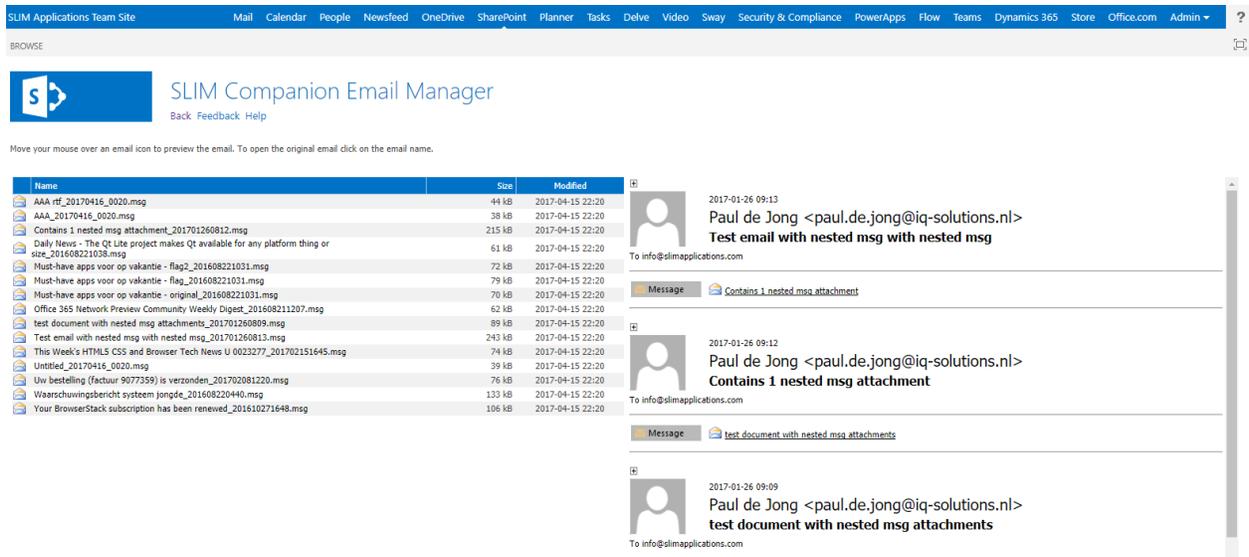


Figure 24. Preview email containing email attachments.

3.4 Download & Zip

The Download & Zip functionality can be used to download multiple documents into a single zip file but it can also be used to download complete folder structures.

Select one or more items and click the Download & Zip button. This opens the SLIM Companion Email Manager page. First an inventory is made to avoid exceeding the browser's limit. If the volume and maximum file size are below the limit the add-in starts downloading the selected items and generates a single zip file named SLIM_Companion_yyyymmddThhmms.zip

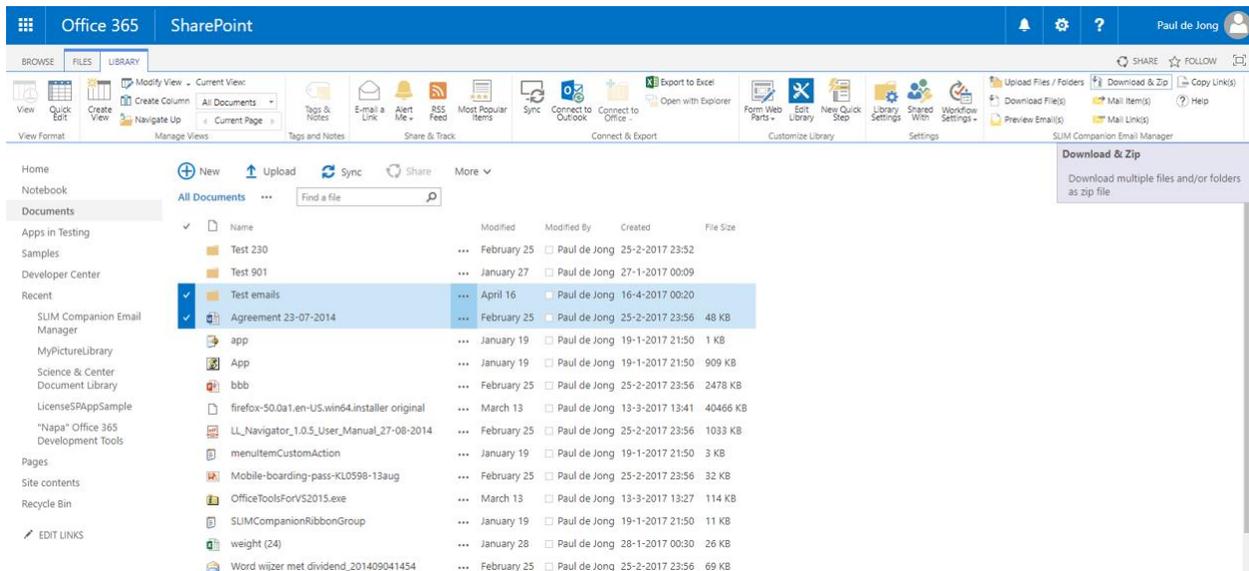


Figure 25. Initiate Download & Zip for a folder plus a document using the classic view.



SLIM Companion Email Manager

[Back](#) [Feedback](#) [Help](#)

Create inventory ✓ (17 items, 1 MB)
Download selected items ✓
Save zip file ✓
Request completed ✓

Click "Back" to return to the previous page.



Figure 26. SLIM Companion Email Manager “Download & Zip” page when using Chrome. The downloaded file at the bottom of the page is marked in green.

The generated zip file does not use compression or encryption. For example, after opening the file using Windows Explorer it shows:

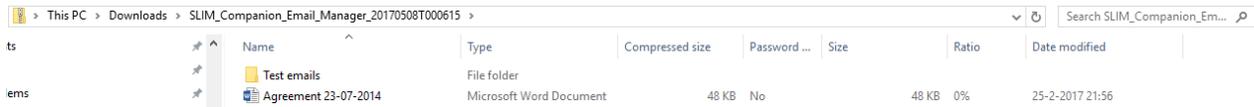


Figure 27. Zip file with content downloaded from SharePoint through SLIM Companion Email Manager.

Note: the zip file contains the SharePoint modification date.

The maximum volume and maximum file size are browser dependent. At the time of writing the maximum file size is 250 MB and the maximum size for the entire zip file is 500 MB. See section 4.4 for the limits for other browsers.

3.5 Mail Item(s)

SLIM Companion Email Manager allows users to select one or more item(s) in SharePoint and directly attach the selected item(s) to an email.

Select an item (e.g. document) and click the “Mail Item(s)” button. This opens the SLIM Companion Email Manager page with the “Mail Item(s)” option. The selected item is downloaded and a new email opens with the selected file attached.

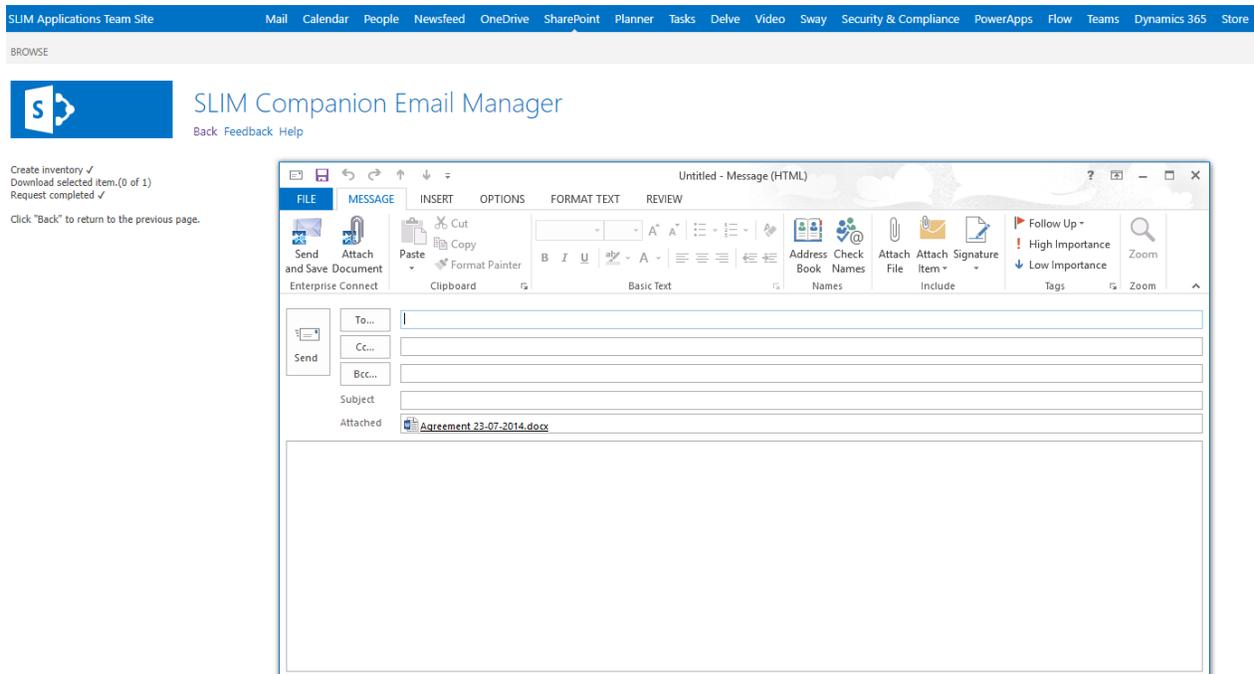


Figure 28. Mail items functionality in SLIM Companion Email Manager for a single document.

In case a single document is selected the SharePoint file is attached to an email message. If multiple files and/or folders are selected the content is placed in a zip file and the zip file is attached to the email.

The email format (msg or eml) is managed centrally. Users can set their personal preference by opening the Help page and then under “Email settings” change the output email format.

3.6 Mail Link(s)

In case the recipients have access to the SharePoint system it is preferred to mail a link rather than one or more documents.

Select on or more items and click the “Mail Link(s)” button. This opens the SLIM Companion Email Manager page with the option “Mail Link(s)” and a new email message opens with the selected links.

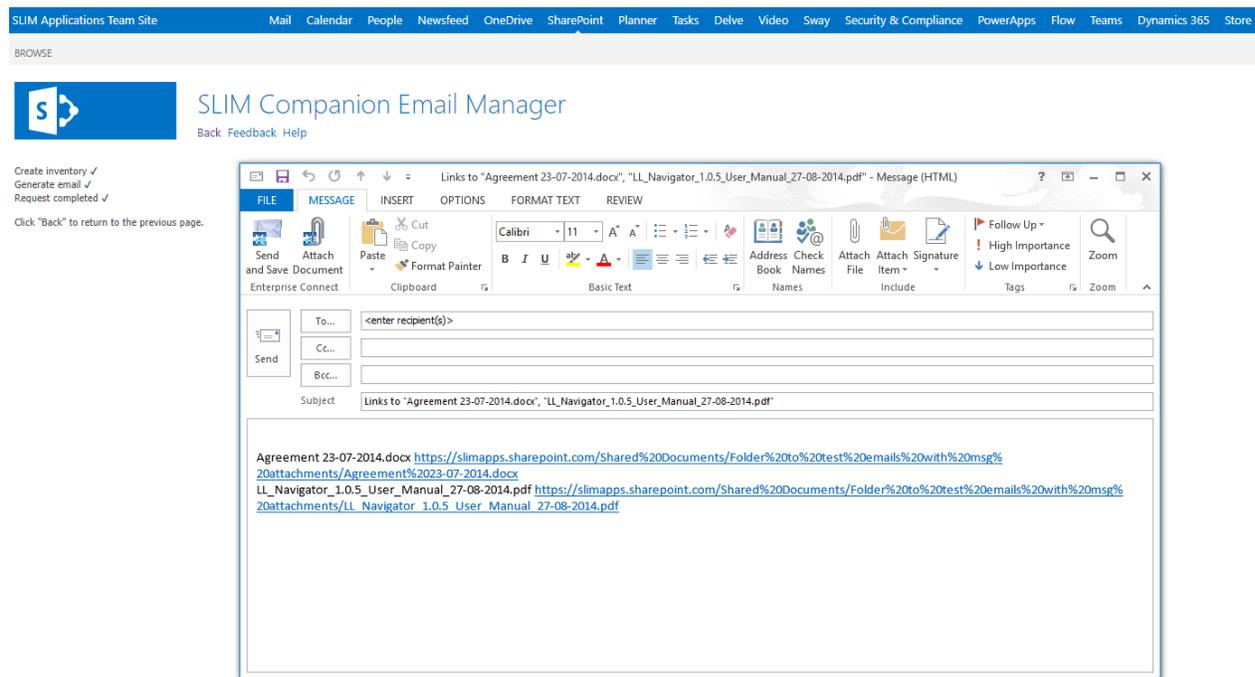


Figure 29. Mail Link(s) functionality in SLIM Companion Email Manager.

The generated email contains the name of each of the selected items plus the URL containing the full path.

3.7 Copy Link(s)

The “Copy Link(s)” option allows a user to copy the link to one or more items.

Select one or more items and click “Copy Link(s)” button. This opens the SLIM Companion Email Manager page with an inventory of the selected items. Click on the link “here” to copy the links to the clipboard.

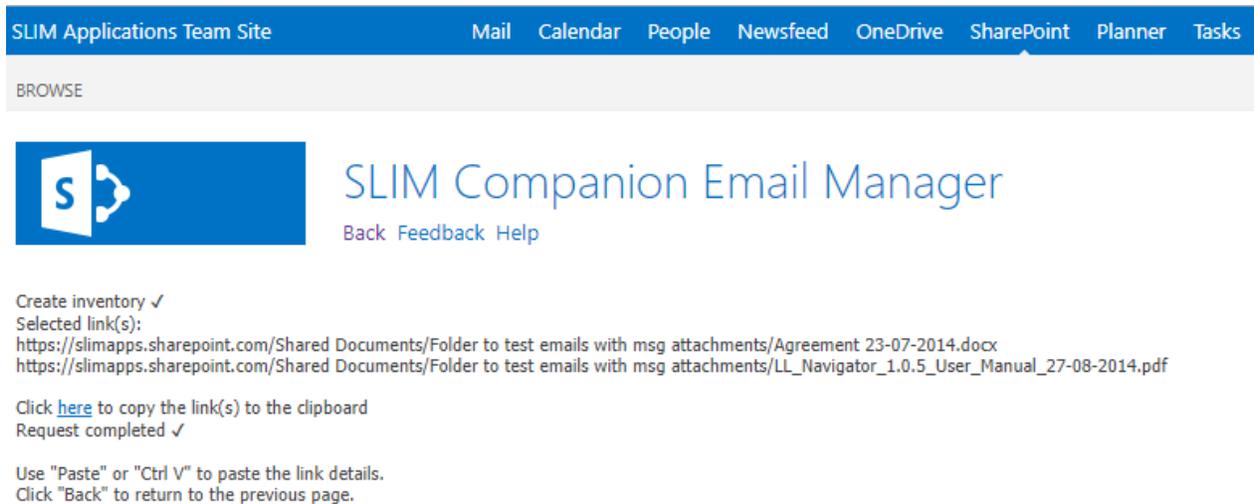


Figure 30. SLIM Companion Email Manager after copying the links to the clipboard

3.8 Help

The Help page is accessible from the ribbon and the SLIM Companion Email Manager page. The Help page provides common FAQs. Expand a section by clicking the + icon.

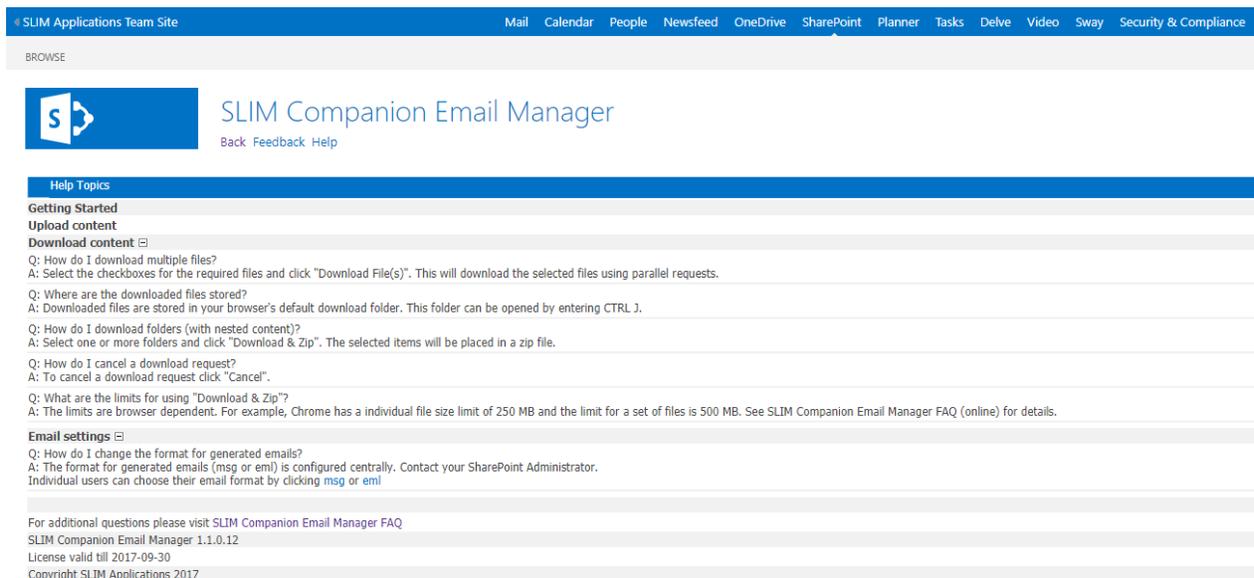


Figure 31. SLIM Companion Email Manager Help page.

At the bottom of the page there is also a link to the online FAQs.

4. Miscellaneous

4.1 Supported browsers

SLIM Companion Email Manager is supported with Chrome, Opera, FireFox, Internet Explorer 11 and Edge. The main benefit of using Chrome, Opera or Edge is that these browsers allows uploading of complete folder structures.

4.2 Supported clients

The add-in is supported with Windows 7 or higher and OS X 10.10 or higher.

4.3 Maximum upload file size

The maximum upload file size on SharePoint Online is determined by SharePoint Online. At the time of writing the limit is 15 GB for SharePoint Online and 10 GB for SharePoint 2016.

The maximum upload file size on SharePoint 2013 is browser dependent. The limits are listed below.

Browser	Maximum upload file size for SharePoint 2013 (in MB)
Chrome	125
Opera	125
FireFox	600
Internet Explorer 11	250
Edge	1000

4.4 Download & Zip limits

The maximum file size and maximum data volume for “Download & Zip” are browser dependent. This applies to both SharePoint Online, SharePoint 2013 and SharePoint 2016.

Browser	Maximum file size (in MB)	Maximum data volume (in MB)
Chrome	250	500
Opera	250	500
FireFox	250	300
Internet Explorer 11	100	300
Edge	500	800

4.5 Supported column types

SLIM Companion Email Manager supports content types with the following column types:

- Single line of text
- Multiple lines of text
- Date and Time
- Choice
- Yes/No
- Person or Group
- Hyperlink or Picture
- Managed metadata
- Number

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