SLIM Applications

Email Manager 2.8 Administrator Guide

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SLIM Applications

1. Introduction

Email Manager is a SharePoint Framework (SPFx) App that extends the standard SharePoint functionality for emails.

Email Manager allows for fast viewing of emails and email attachments such as docx, pdf, jpg, … in the browser. The app also allows for extracting email metadata from emails during uploading and capturing values into SharePoint columns. SharePoint document(s) can also be directly attached to a new email.

Email Manager is supported with SharePoint Online, SharePoint 2019, SharePoint Server SE and Microsoft Teams. The Email Manager functionality can be exposed in Microsoft Teams by adding the SharePoint library as a separate tab using "Website". This way users can drag and drop emails from Outlook, automatically extract email metadata during uploading, view emails + email attachments and attach documents to new emails directly using their Teams app.

The details of the supported browsers, client operating systems are described in the Email Manager release notes (see https://www.slimapplications.com/product/email-manager/).

2. Installation

This section describes the initial installation of the Email Manager App.

The following prerequisites need to be met:
1. The zip file with EmailManager files has been downloaded from our web site.
2. Account with permissions to:
- install Apps into the SharePoint App catalog "Apps for SharePoint"
- permissions to create a new site collection
3. Optional: Microsoft SPO Management Shell, PnP PowerShell or CLI for Microsoft 365 to set properties for the Email Manager app. The properties can also be configured using a text file for testing / evaluation purposes. The latter approach is the recommendation for initial configurations or trials.

2.1 Installation of the SPFx App

Execute the following steps to install the app:

1. Browse to https://admin.microsoft.com/
2. In the "Admin centers" section (under "Show All") select "SharePoint"
3. Select "More features" in the left-hand side navigation and click on "Open" in the Apps section.
4. In the Apps page click on "App Catalog" and select "Apps for SharePoint"
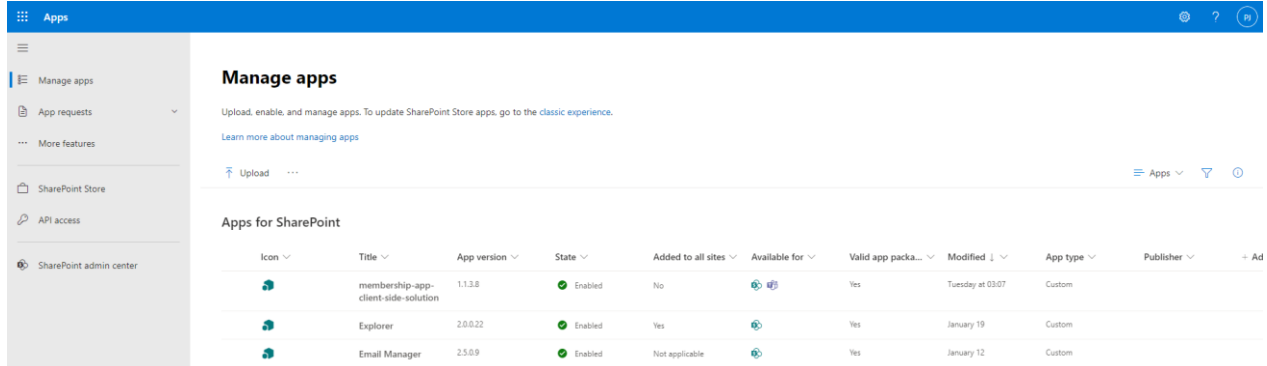
Figure 1a. Apps for SharePoint in SharePoint Online
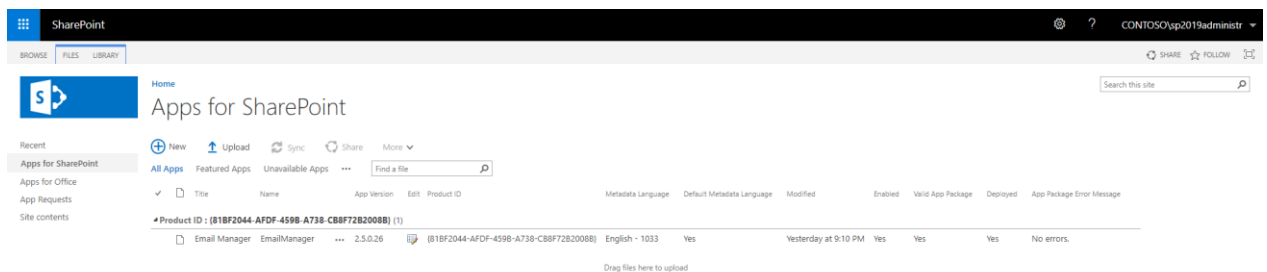
Figure 1b. Apps for SharePoint in SharePoint 2019

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5. Upload the EmailManager.sppkg file using the "Upload" button or use drag and drop. Use "Only enable this app" if the app needs to be added selected sites.

Figure 3a. Email Manager confirmation screen SharePoint Online

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6. The confirmation screen is displayed:

Figure 3b. Email Manager confirmation screen SharePoint 2019

7. Click "Deploy"
   Leave the checkbox unchecked to avoid the *App being automatically to each site in the tenant.*
8. Use the ellipsis (…) to check in the App in case it has been automatically checked out. This may happen on SharePoint 2019.
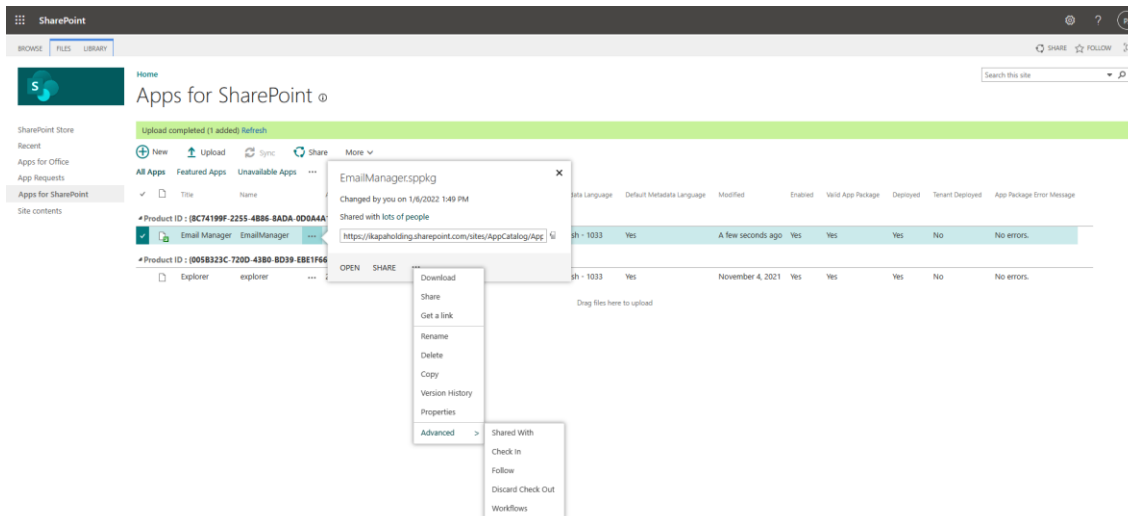
Figure 4. "Check in" option for the Email Manager App

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9. Create a site collection named EmailManager with the following URL /sites/emailmanager
    For example, https://<tenant>.sharepoint.com/sites/emailmanager
    Note: the use of a separate sitecollection to support the EmailManager app was introduced in version 2.6.0.0.

10. Browse to the site collection /sites/emailmanager and open "Site contents".
    Create a document library named SiteAssets (with url /sites/emailmanager/siteassets

11. Browse to the SiteAssets library and upload the js and png files from the package.
    Also upload EmailManagerProperties.txt if the tenant properties have not been set. It is advised during initial install to use the EmailManagerProperties.txt file.

12. Open the "Library settings" for the SiteAssets library

13. Click on "Permissions for this document library"
    - click on "Stop inheriting permissions" and confirm by clicking "OK"
    - select the 3 default groups (Visitors, Members and Owners) and click "Remove User Permissions" and confirm by clicking "OK"
    - select "Grant permissions" and enter every.
    - select "Everyone except external users"
    - under "show options" unselect the check box for sending an email confirmation, select permission level "Read" and click "Share"
    Note: if the use of the EmailManager needs be restricted then only grant the users/groups access to this library.

    The following steps apply to manual deployment of the App to a site. To deploy the App to all (or a large number of sites) using PowerShell see Appendix E.

14. Browse to a SharePoint site

15. Select "Settings" | "Add an app"

16. In the left-hand menu select the link "From Your Organization"
    This shows a list with available apps.

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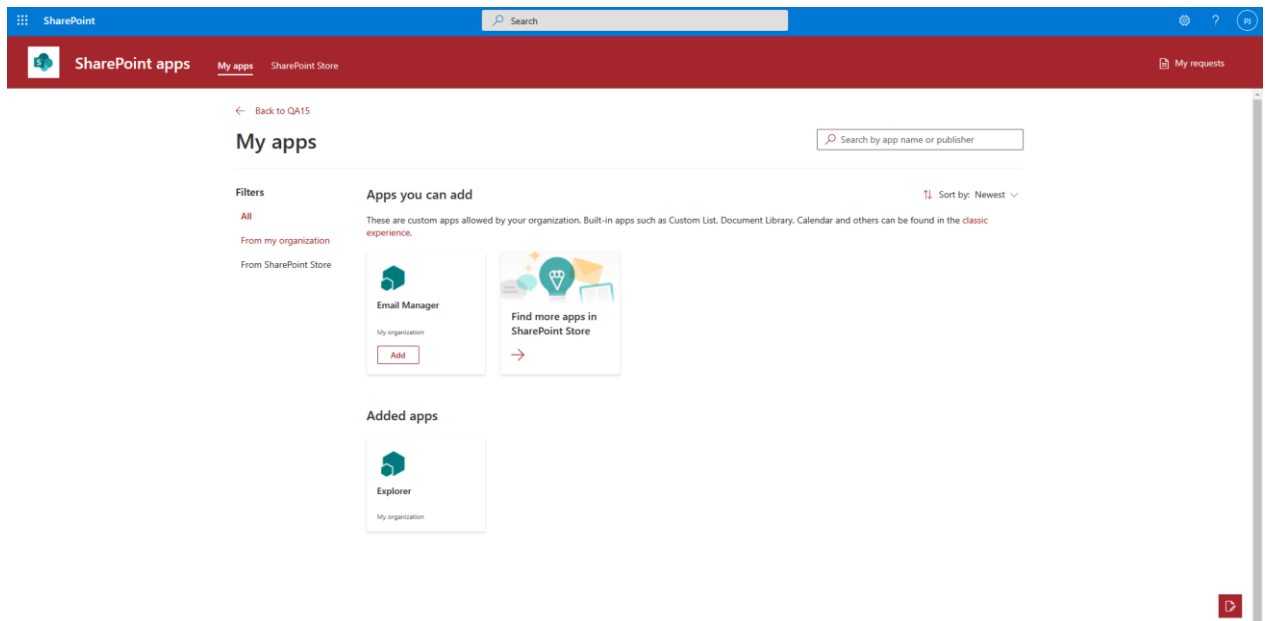
Figure 5. Page with the available Apps

17. Select the Email Manager App and use the link at the top of the screen to return to the "Site 1. contents page".
18. Wait a short while until the App is installed and available
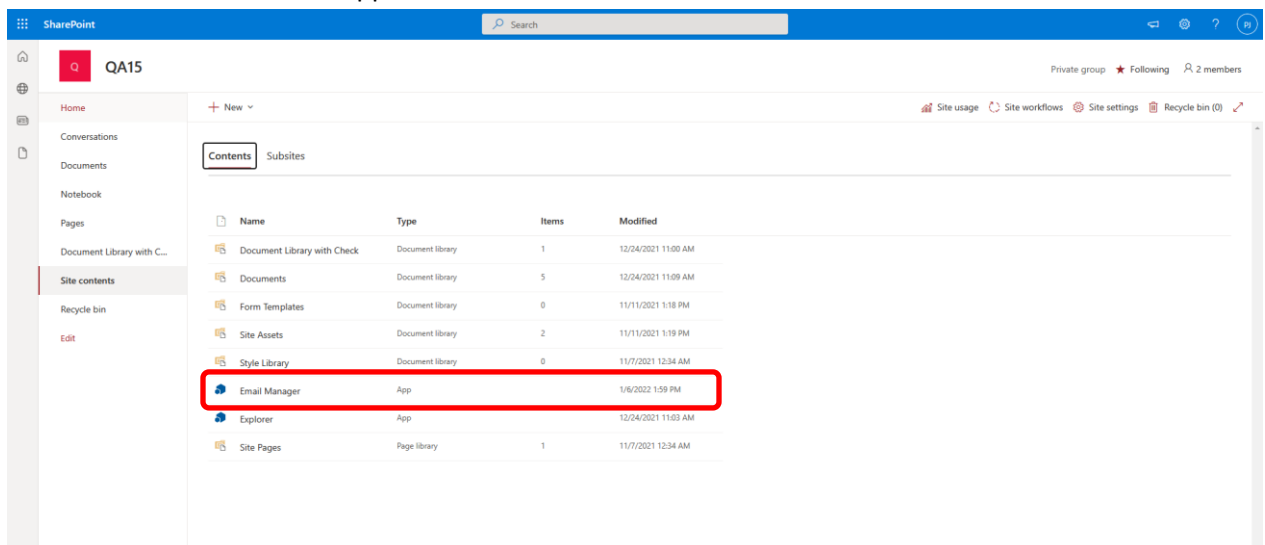
Figure 6. Site Contents with the available "Email Manager" App.

2.2 Testing

1. Browse to a Document library in your SharePoint site

2. Check if the button "View email(s)" is shown in the ribbon (for Modern View).
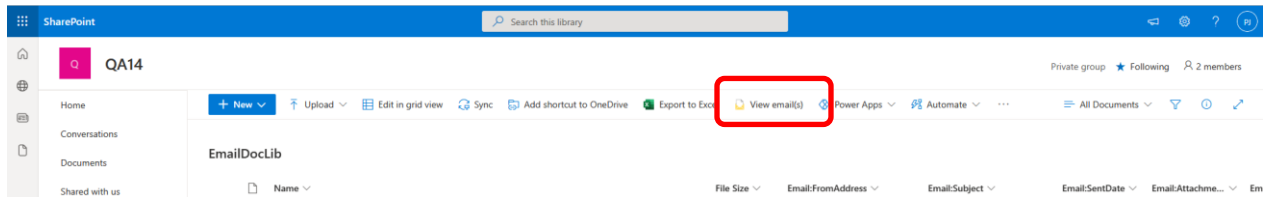
Figure 7. Document library (modern view) with the "Email view(s)" button.

Note: in case the "Email view(s)" button is not displayed refresh the page by simultaneously clicking CTRL and your browser's refresh button.

3. Select an email or document to view the email using Email Manager.

2.3 Deploying a new version

Deploying a new version of the App is in most cases as simple as adding a new js file to the SiteAssets library in the /sites/emailmanager site collection.

1. Browse to the /sites/emailmanager/siteassets library
2. Upload the updated js file
   Overwrite the existing file.
3. Browse to a document library where the app is available and reload the page
4. View an email

   In case the sppkg file has also changed execute the following steps:
   (only execute these steps if explicitly requested by SLIM Applications).
1. Upload the latest sppkg file to "Apps for SharePoint"
2. When the following dialog is shown click "Replace it".
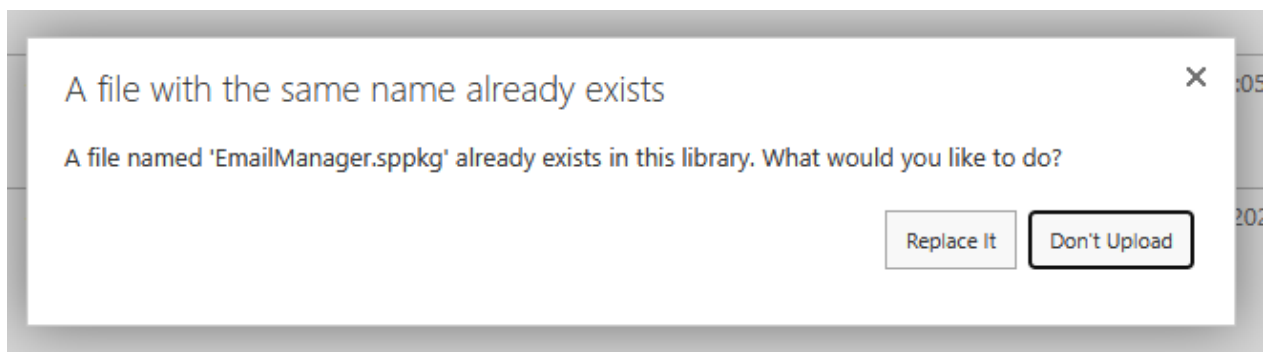
Figure 8. Dialog window when uploading a new version of the App.

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3. Browse to the site where the App has been installed and open "Site contents".
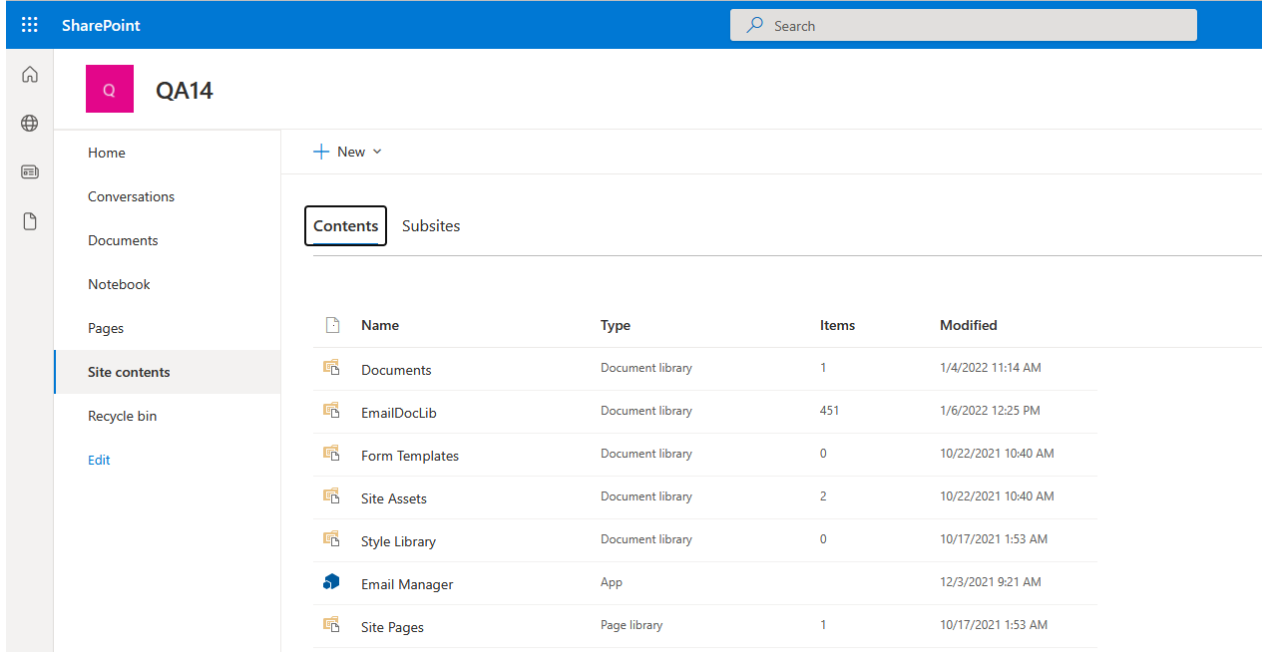
Figure 9. Site contents for a site with the Email Manager installed.

4. Select the "Details" option for the Email Manager (under …). This shows the following screen.
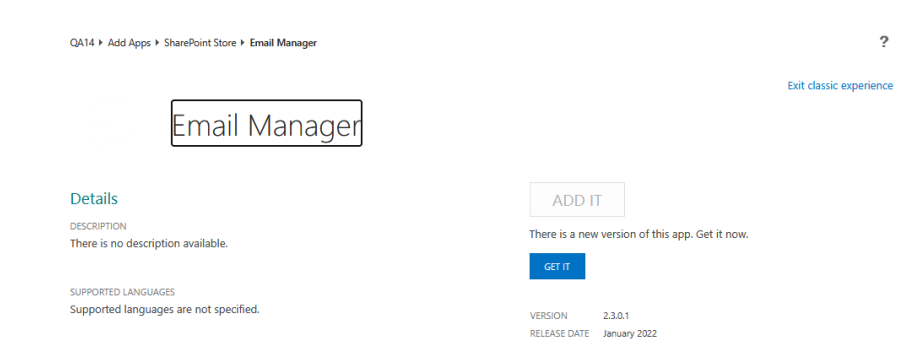
Figure 10. Update window for Email Manager

5. Click "GET IT".
6. Browse to the document library
7. Click CTRL + your browser's refresh button to avoid caching problems
8. View an email and click "About" in the top right corner to check that the correct version is used.

2.4 Removal of the App

The steps below apply to sites where the Email Manager App has "manually" been deployed. In case the App has been deployed using PowerShell see instructions in Appendix E.

Browse to the site where the App has been deployed and open the "Site contents" page

1. Click on the ellipsis (…) of the Email Manager App and select the option "Remove".
2. You may be asked to switch to the classic view

Action isn't supported in this view

We are working to add that functionality to this page. In the meantime, please go to classic SharePoint to complete this task.

> **Return to classic SharePoint**   **Close**
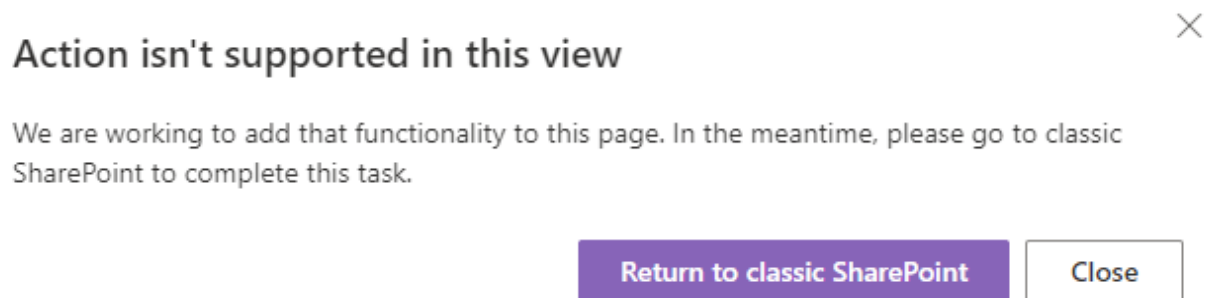
Figure 11. Dialog about removing apps using modern view.

3. Click "Return to classic SharePoint"
4. Click on "Email Manager" and select the option "REMOVE"
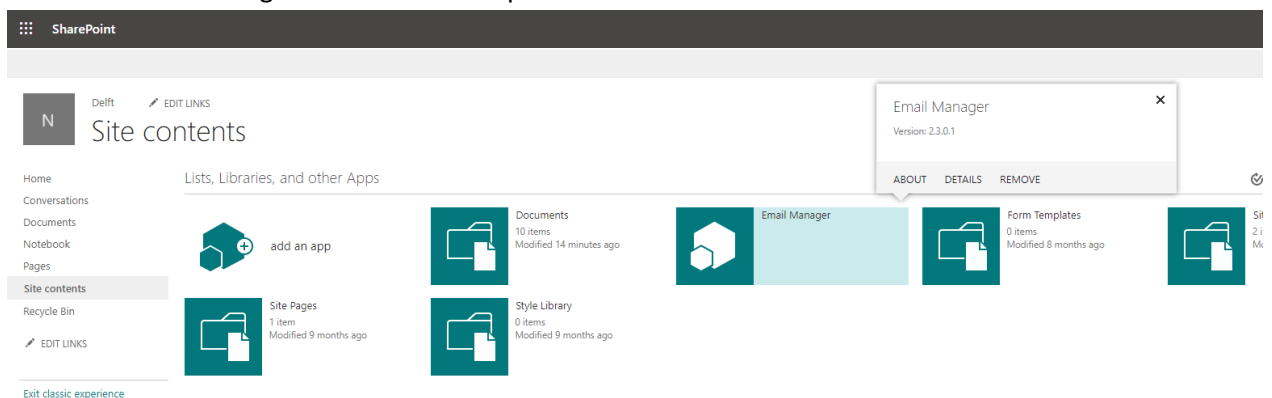
Figure 12. Classic view of "Site contents".

5. Click "OK" to confirm.
6. Repeat steps 1 through 6 for each site where the app has been "manually" deployed.

The following steps are necessary to remove the App from the App catalog
1. Open "Apps for SharePoint"

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2. Click on the ellipsis (…) for the Email Manager App
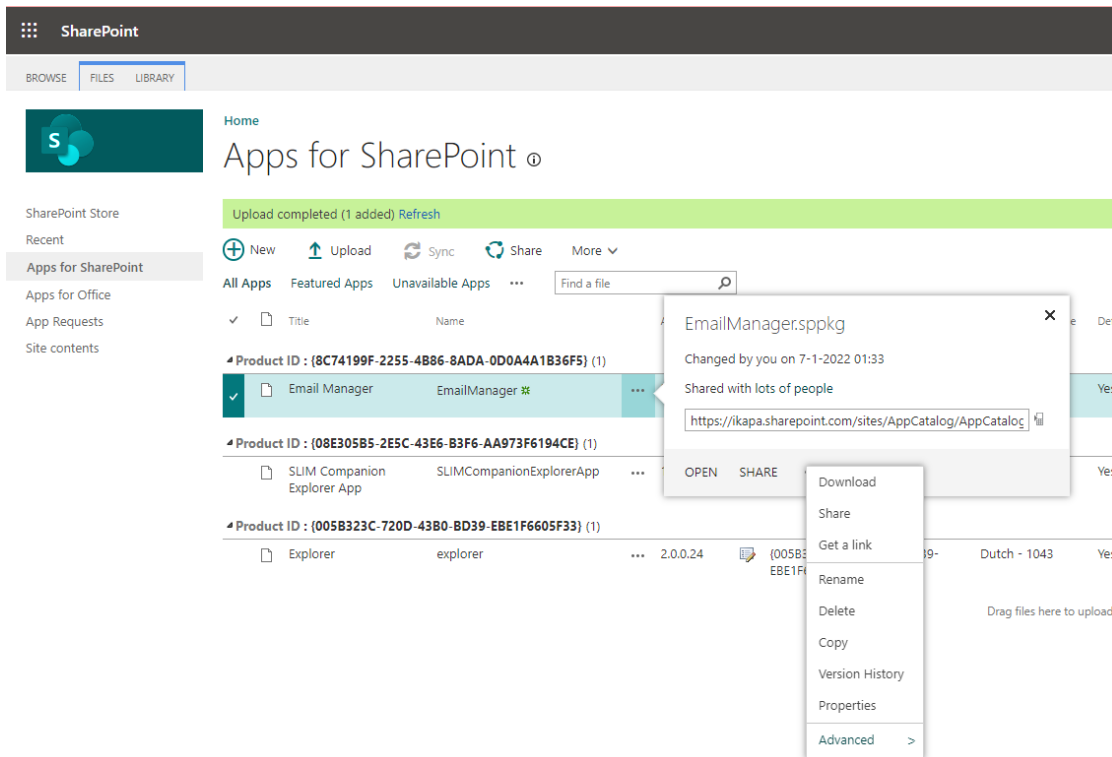
Figure 13. Deleting an app from "Apps for SharePoint".

3. Select the option "Delete"
4. Confirm by clicking "OK"
5. Browse to "Site contents" and click "RECYCLE BIN" (top right)
6. Delete the EmailManager.sppkg file from the recycle bin
7. Exit the classic experience and at the bottom of the page click "Second-stage recycle bin"
8. Delete the EmailManager.sppkg file from the second stage recycle bin
9. Confirm by clicking "Delete"

The steps below are necessary to delete the supporting files in the EmailManager site collection

For SharePoint Online:
1. Browse to the SharePoint admin center and delete the EmailManager site collection.

For SharePoint 2019 or SharePoint Server SE:
1. Browse to Central Admin and under the section "Application Management" select "Delete Site Collection".

3. Configuration

In this section additional instructions are provided to configure the Office cache library and to configure metadata mapping. Both features are optional and without configuration the optional functionalities will not be available in the app.

3.1 Office Cache library

Email Manager 2.2.0.94 and later versions support viewing of Office email attachments directly in the browser.

This feature uses a library as a cache location in the SharePoint environment. This feature increases the adoption of SharePoint and increases user productivity. It also eliminates the need to have Office apps installed on the end users' computer (e.g., macOS) and reduces exposure of sensitive content via the local computer (compliance) because the Office files do not need to be downloaded to the end users' local machine.

The central library needs to be configured to ensure users can only view their own files. Execute the following steps to configure this central cache location in a separate site:

1. Login as site collection admin (or other role with permissions to create a new site)
2. Browse to the EmailManager site and create a new library. For example: Cache
3. Browse to the Settings page of the library and click "Permissions for this document library"
   - stop inheriting permissions
   - remove existing groups (3x)
   - grant access to "everyone except external users" with permission level = Contribute
4. Browse to the Settings page of the library and select "Versioning Settings"
   - Require content approval: checked
   - Draft Item Security = Only users who can approve items (and the author of the item)
   - click "OK"
5. Browse to the Settings page of the library and select "Advanced settings":
   - "Allow items from this document library to appear in search results?" No
   - Change the "Offline Client Availability" to No
   - click "OK"

The final step is to configure the Email Manager app to use the cache library. The configuration settings are made using so-called tenant properties (see https://docs.microsoft.com/en-us/sharepoint/dev/spfx/tenant-properties?tabs=sprest) or using the EmailManagerProperties.txt file for testing/evaluation purposes.

To change the cache details in the EmailManagerProperties.txt file execute the following steps:
1. Browse to the /sites/emailmanager/siteassets library
2. Edit the EmailManagerProperties.txt file and change the OfficeCacheLocation
3. Save the file

The tenant properties can only be set using Microsoft SPO Management Shell, PnP PowerShell or CLI for Microsoft 365.

The instructions below are for PnP PowerShell:
1. Open a PowerShell window with Run as Administrator
2. Enter the following commands (after replacing <tenant>)

> *$tenant = "https://<tenant>.sharepoint.com/"*
> *$cred = Get-Credential*
> *Connect-PnPOnline -Url $tenant -Credentials $cred*
> *Set-PnPStorageEntity -Key OfficeCacheLocation -Value "https://<tenant>.sharepoint.com/sites/EmailManager/Cache" -Description "Absolute url to the cache library (excl. /forms part)"*

Note #1: if the tenant uses multiple factor authentication (MFA) use
Connect-PnPOnline -UseWebLogin -Url $tenant

Note #2: To check the value of the field, use the following command
Get-PnPStorageEntity -Key OfficeCacheLocation

Note #3: To remove the field use
Remove-PnPStorageEntity -Key OfficeCacheLocation

Testing
Upload an email with one or more Office attachments (e.g., docx, xlsx, pptx or vsdx) and use the Email Manager's "View email(s)" button to view the email in the browser. Verify that clicking the email Office attachment results in the opening of the Office attachment in the browser.

Characteristics
The cache library has the following characteristics:

1. The site is not directly accessible for users.
2. Users can only open the cache library.
3. Users will only see their **own** document(s) because of the configuration of the library with content approval.
   Documents from other users are not visible.
4. The documents in the cache library are not indexed by the search engine.
5. Cached documents are automatically purged when the user views a different Office attachment, and the cached document(s) exceeds the threshold (1 hour).
6. Purged Office documents are not placed in the site's recycle bin; they are permanently deleted.
7. The site collection administrator who created the site can view all documents present in the Cache library.

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3.2 Configuring email metadata mapping

Email Manager 2.3 and later support extraction of metadata from emails during uploading and capturing the values into SharePoint columns. This allows for improved sorting, viewing, and searching for emails.

The table below lists the email metadata that can be extracted from emails and captured into SharePoint columns:

Email metadata name	Example
From	Info
From address	info@slimapplications.com
To	Paul de Jong
To address	paul.de.jong@slimapplications.com
CC	Support
CC address	support@slimapplications.com
BCC	Sales
BCC address	sales@slimapplications.com
Message ID	<020f01d7dd7a$fc86f2d0$f50$@slimapplications.com>
Subject	Example message
Conversation	Example message
Sent Date	Fri, 19 Nov 2021 19:23:50 GMT
Received Date	Fri, 19 Nov 2021 19:23:51 GMT
hasAttachment	Yes
HasAttachmentYesNo	Yes
Importance	High
Sensitivity	Personal
Categories	Green

Table 1. List with supported email metadata fields.

Note: extracting the email attachments (actual files) into separate SharePoint columns is not supported. The files can be accessed via the "View email(s)" in the browser.

Organizations can choose to extract all of the above email metadata fields or a subset or nothing. The Email Manager tool needs to be configured which email metadata field needs to be captured into which SharePoint column. The mapping between email metadata name and the corresponding SharePoint column is made using tenant properties. Like the configuration of the cache library in the preceding section.

The mapping is best demonstrated using an example. In the following table a subset with 10 of the available metadata columns are mapped against SharePoint columns.

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Email metadata name	EmailManager App name	SharePoint column name* (example)	Type**
From	From	Email_From	Single line of text
From address	FromAddress	Email_FromAddress	Single line of text
To	To		Single line of text / Multiple lines of text
To address	ToAddress	Email_ToAddress	Single line of text / Multiple lines of text
CC	CC		Single line of text / Multiple lines of text
CC address	CCAddress	Email_CCAddress	Single line of text / Multiple lines of text
BCC	BCC		Single line of text / Multiple lines of text
BCC address	BCCAddress		Single line of text / Multiple lines of text
Message ID	MessageID		Single line of text
Subject	Subject	Email_Subject	Single line of text
Conversation	Conversation	Email_Conversation	Single line of text
Sent Date	SentDate	Email_SentDate	DateTime
Received Date	ReceivedDate	Email_ReceivedDate	DateTime
hasAttachment	hasAttachment	Email_Attachments	Choice* (0,1)
hasAttachmentYesNo	hasAttachmentYesNo	Email_Attachments	Yes/No
Importance	Importance	Email_Importance	Choice (0,1,2)
Sensitivity	Sensitivity		Choice (0,1,2,3)
Categories	Categories		String

Table 2. Details of supported email metadata fields

*this is the internal SharePoint column name shown as an **example**.
** single line of text fields can hold up to 255 characters. Email Manager will truncate values exceeding 255 characters. Use multiple lines of text to cater for values exceeding 255 characters.

Important: The Administrator has full control on the naming of the SharePoint columns.

The Administrator or the site collection administrator needs to create the 10 SharePoint columns on the libraries or at a site level. The internal SharePoint column names can be found by browsing to the library and then opening the "Library Settings" under the cog at the top right corner. In the section "Columns" click on a name and read the internal name from the URL. For example, https://ikapa.sharepoint.com/sites/NL/_layouts/15/FldEdit.aspx?List=%7B59E8281F-667C-4399-A124-1BFE83E77E1D%7D&Field=Email_From

The values in the tenant properties can be set using the following PowerShell script:

```
Set-PnPStorageEntity -Key From -Value "Email_From"
Set-PnPStorageEntity -Key FromAddress -Value "Email_FromAddress"
```

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```
Set-PnPStorageEntity -Key ToAddress -Value "Email_ToAddress
Set-PnPStorageEntity -Key CCAddress -Value "Email_CCAddress"
Set-PnPStorageEntity -Key Subject -Value "Email_Subject"
Set-PnPStorageEntity -Key Conversation -Value "Email_Conversation"
Set-PnPStorageEntity -Key SentDate -Value "Email_SentDate"
Set-PnPStorageEntity -Key ReceivedDate -Value "Email_ReceivedDate"
Set-PnPStorageEntity -Key hasAttachment -Value "Email_Attachments"
Set-PnPStorageEntity -Key Importance -Value "Email_Importance"
```

The -Key is the EmailManager App name (fixed) and the -Value is the SharePoint column name (free for the Administrator to choose).

Appendices A, B and C contain PowerShell scripts to set values, show values (for QA-ing) and remove fields respectively.
Configuring the app via tenant properties is the recommended solution for production use. For testing and acceptance environments where making changes efficiently is important it is also possible to use a text file. This file needs to be named "EmailManagerProperties.txt" and must be placed in the SiteAssets library in the root of the tenant. For example,
https://<tenant>.sharepoint.com>/sites/emailmanager/siteassets/EmailManagerProperties.txt

This text file contains name value pairs separated by an equal sign. See Appendix D.

From=Email_From
FromAddress=Email_FromAddress

Note: when both the tenant properties and the EmailManagerproperties.txt file are present the tenant properties take precedence.

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3.3 Special configuration options

This section describes special configuration options. These are optional and not required.

3.3.1 Rename email using email metadata

Typically when uploading an email from Outlook to SharePoint the email is created with the name
<subject>.msg
If that name is already present a sequence number will be automatically added like <subject>(2).msg

EmailManager allows creation of unique names by combining email metadata specified in the field
EmailNameSyntax. For example, by combining the subject with the sent date the email name becomes
<subject>_20220101_165800.msg

This has the additional advantage that sorting emails by name groups the emails by subject **and**
automatically places them in a chronological (or reverse chronological) order.

The email naming syntax uses the email metadata field names from the preceding table. For example, to
combine the subject and sent date use the following script to set the value for the *EmailNameSyntax*
field.

Set-PnPStorageEntity -Key EmailNameSyntax -Value "<Subject>_<SentDate>" -Description "Name
convention for emails"

3.3.2 Specifying email content type

Email Manager 2.3.0.20 and later support assigning an email content type. The email content type needs
to be specified via the tenant properties.

Set-PnPStorageEntity -Key EmailContentTypeName -Value "SLIM Email" -Description "Name of the
content type for emails. (optional)"

3.3.3 Mail item(*s*)

This optional feature allows users to selected multiple documents and attach them as separate
attachments to a new email. The feature can also be used to attach a folder (plus nested content) as a
single zip attachment to a new email. The visibility of the "Mail item(s)" button is controlled by a tenant
property

Set-PnPStorageEntity -Key ShowMailItems -Value "true" -Description "Show Mail item(s) button in the
ribbon. (optional)"

or by adding an extra parameter into the static EmailManagerProperties.txt file
ShowMailItems=true

3.3.4 Mail link(s)

This optional feature allows users to selected multiple documents (or folders) and generate a new email with links to the selected items. The visibility of the "Mail link(s)" button is controlled by a tenant property:

Set-PnPStorageEntity -Key ShowMailLinks -Value "true" -Description "Show Mail link(s) button in the ribbon. (optional)"

or by adding an extra parameter into the static EmailManagerProperties.txt file
ShowMailLinks=true

The format of the link can be controlled by the tenant property
Set-PnPStorageEntity -Key LinkFormat -Value "namelink" -Description "Link format for links"

or by adding an extra parameter into the static EmailManagerProperties.txt file
LinkFormat=namelink

The supported values are:
- link
- namelink
- namelinklocation
- linklocation

Note: location is the folder or library where the selected item is located. This is similar to the "Open file location" in File Explorer when using search.

3.3.5 Open in app

This optional feature has been introduced in Email Manager 2.0.3.37 and allows for improved integration of SharePoint and the local mail client (e.g., Outlook).

The feature is available from the ribbon, the context menu of emails and in the email preview window. It downloads the selected email(s) and uses the configuration of the local client to directly open the local mail client.

Note #1: this feature depends on the configuration of the local client. This needs to be done independent from the installation of the Email Manager App.
Note #2: Changing the client configuration to directly open emails in the local email client leads to organizations deploying the Email Manager App to all sites in order to offer a consistent behavior.

The feature is disabled by default and can be enabled by adding a property into the tenant properties:

Set-PnPStorageEntity -Key ShowOpenInApp -Value "true" -Description "Show 'Open in app' button to provide integration with local email client. Values true|false. Default behavior is false."

or by adding an extra parameter into the static EmailManagerProperties.txt file
ShowOpenInApp=true

3.3.6 Values used in choice fields

The following email metadata fields are of type choice:

- hasAttachment with values No, Yes
- Importance with values Low, Normal, High
- Sensitivity with values Normal, Personal, Private, Confidential

These default values can be overwritten using the fields
AttachmentLabels
ImportanceLabels
SensitivityLabels

Set-PnPStorageEntity -Key AttachmentLabels -Value "false,true" -Description "Comma separated list with display values for the presence of attachments"

For example, if an email is uploaded with an attachment and the hasAttachment field has been mapped to a SharePoint column via the tenant properties the value of the column will be set to true.
In the EmailManagerProperties.txt file add the following parameter
AttachmentLabels=No,Yes

3.3.7 Automatic correction for time zone

The date fields extracted from emails like date sent are in UTC. Capturing the values into SharePoint columns may confuse users because the values correspond with a different time zone.

Email Manager provides a way to automatically convert the email date values captured into SharePoint columns to the local time zone. This is done by the optional field UTCOffset. This field uses the format hh:mm.

For example, for New Zealand (NZDT) use 13:00 and India (IST) use 05:30.

Note: this setting only applies to the extracted date fields captured into SharePoint columns. The date shown in the email preview uses the local browser's time zone.

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3.3.8 Automatic metadata extraction

The automatic extraction of email metadata during uploading is controlled by the parameter "AutomaticMetadataExtraction". For example, to disable automatic metadata extraction add the following line:

AutomaticMetadataExtraction=false

The default value is true and the allowed values are true and false.

3.3.9 View Office attachments in the browser

Office attachments can be viewed in the browser using the following methods:

SharePoint Online	
Office Online	OfficeOnline
Office URI	OfficeURI
SharePoint 2019 or SharePoint Server SE	
Office Online Server	OfficeOnlineServer
Office URI	OfficeURI

For example, to use Office Online Server on a SharePoint 2019 system use
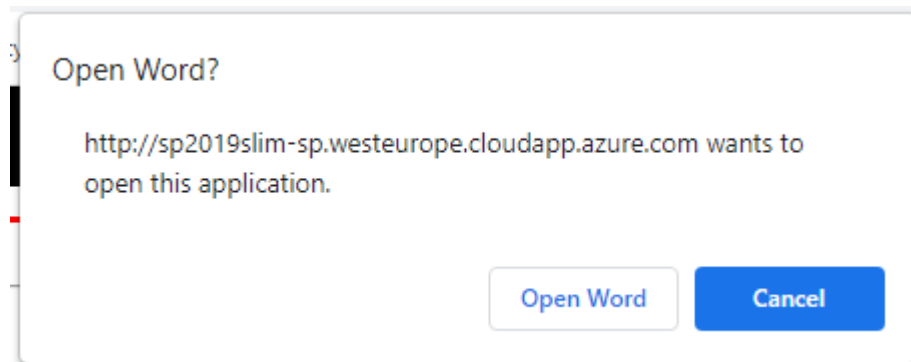
OfficeAttachmentMode= OfficeOnlineServer

Figure 14. "Office URI" popup that is shown before opening the Office file using the local Office application.

The default value is "OfficeOnline".

3.3.10 Show About link

The property ShowAboutLink (true or false) can be used to show or hide the About link.

About   Close

HTML | Plain Text | Open in app | Download | Print | Properties | Preview in SharePoint | Collapse
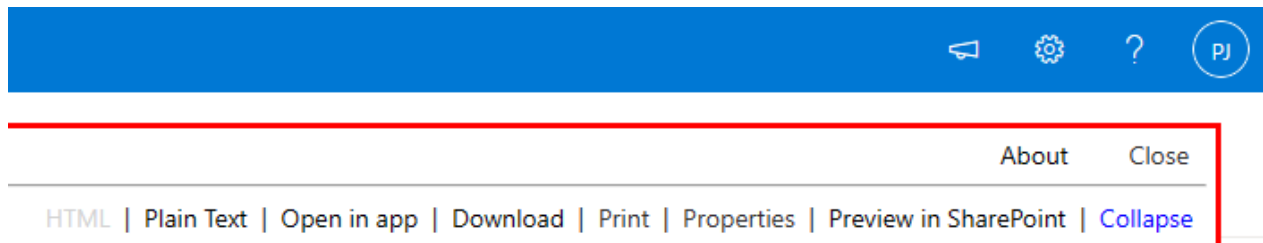
Figure 15. Email Manager configured with the About link.

The default value is false.

3.3.11 Show Help link

The property ShowHelpLink (true or false) can be used to show or hide the Help link.
If the value is set to true it will display the contents of the HelpContents parameter. For example,
HelpContents=Visit the Help page for instructions

Clicking on the Help links shows a dialog with the contents from the "HelpContents" parameter.

About   Help   Close

Close

Visit the Help page for instructions
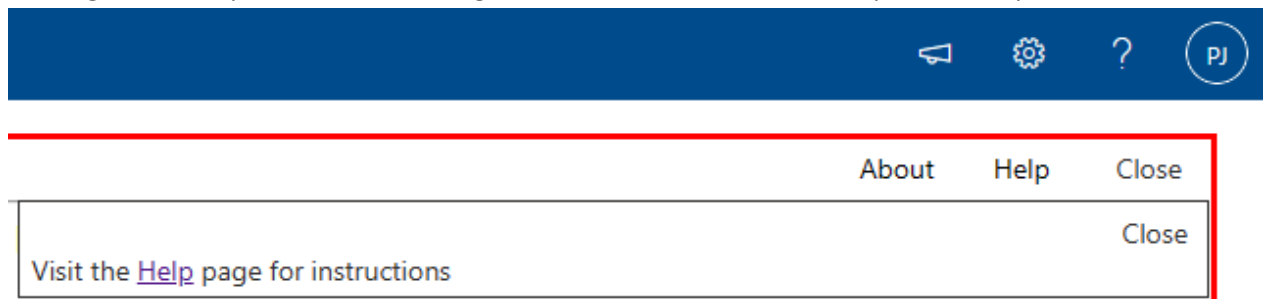
Figure 16. Email Manager configured with the Help link.

If the HelpContents only contains a link then clicking on "Help" will directly open the link in a new tab.
For example,
HelpContents=https://www.slimapplications.com/

The default value for showing the Help link is false.

3.3.12 Show Bcc field

This is controlled by the parameter "ShowBcc" with possible values true or false. For example,
ShowBcc=true

The default value is false.

3.3.13 Draft emails

Draft emails may not have a subject and/or sent date. Email Manager can be configured to use the upload date as sent date and "Draft" as subject by using the property AutoCompleteDraftEmails. For example,

AutoCompleteDraftEmails=true

Note: this parameter is only relevant when the AutomaticMetadataExtraction=true.

The default value is false.

3.3.14 Email header

The email header can be displayed in a similar way to the standard SharePoint preview in SharePoint Online.

Figure 17. Email Header presentation set to "SharePointOnline".

The header can also be shown in a similar way as the Outlook client.

Figure 18. Email Header presentation set to "Outlook".

This is controlled by the parameter "EmailHeaderPresentation" with possible value "SharePointOnline" or "Outlook". For example, the use the Outlook presentation for the header use

EmailHeaderPresentation=Outlook

or via PnP PowerShell use

Set-PnPStorageEntity -Key EmailHeaderPresentation -Value "Outlook" -Description "Presentation email header"

The default value is "Outlook" and the supported values are "Outlook" and "SharePointOnline".

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3.3.15 Email presentation

Email Manager 2.5 supports presenting emails in HTML. This allows for displaying tables, fonts, colors and images. The result is very similar to the presentation of the email in Outlook.

The behavior is controlled using the parameter EmailBodyPresentation. For example, to show the HTML presentation as preferred option add the following line to the EmailManagerProperties.txt file

EmailBodyPresentation=HTML,Plain Text

The same behavior can be set using PowerShell (see Appendix A):

Set-PnPStorageEntity -Key EmailBodyPresentation -Value "HTML,Plain Text" -Description "Presentation email body preference"

The default value is "HTML" and the supported values are "HTML", "Rich Text", "Plain Text".

3.3.16 Override default action for Office attachments

It is possible to control the opening of Office attachments per type. In most cases organizations will open Office files in the browser. In some organizations they may want to directly open Excel attachments in the local application. This can be controlled by the following parameters:

OpenBehaviourWord
OpenBehaviourExcel
OpenBehaviourPowerPoint
OpenBehaviourVisio

For example, to open Excel files using the local Excel application use the following parameter in the EmailManagerProperties.txt file:

OpenBehaviourExcel=View in app

The default value is "View in browser" and the supported values are "View in browser" and "View in app".

3.3.17 Email format

The email format used by "Mail item(s)" and/or "Mail link(s)" can be set to msg or eml using the parameter EmailFormat.

For example, to generate emails in eml use

Set-PnPStorageEntity -Key EmailFormat -Value "eml" -Description "Email format for generated emails"

or use the following parameter in the EmailManagerProperties.txt file:

EmailFormat=eml

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The default value is "msg" and the allowed values are "msg" and "eml".

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Appendix A PnP script to set properties

```
Set-PnPStorageEntity -Key From -Value "Email_From" -Description "Internal SharePoint column name
with the 'From' details"
Set-PnPStorageEntity -Key FromAddress -Value "Email_FromAddress" -Description "Internal
SharePoint column name with the 'From address' details"
Set-PnPStorageEntity -Key To -Value "Email_To" -Description "Internal SharePoint column name with
the 'To' details"
Set-PnPStorageEntity -Key ToAddress -Value "Email_ToAddress" -Description "Internal SharePoint
column name with the 'To address' details"
Set-PnPStorageEntity -Key CC -Value "Email_CC" -Description "Internal SharePoint column name with
the 'CC' details"
Set-PnPStorageEntity -Key CCAddress -Value "Email_CCAddress" -Description "Internal SharePoint
column name with the 'CC address' details"
Set-PnPStorageEntity -Key BCC -Value "Email_BCC" -Description "Internal SharePoint column name
with the 'BCC' details"
Set-PnPStorageEntity -Key BCCAddress -Value "Email_BCCAddress" -Description "Internal SharePoint
column name with the 'BCC address' details"
Set-PnPStorageEntity -Key MessageID -Value "Email_MessageID" -Description "Internal SharePoint
column name with the 'Message ID' details"
Set-PnPStorageEntity -Key Subject -Value "Email_Subject" -Description "Internal SharePoint column
name with the 'Subject'"
Set-PnPStorageEntity -Key Conversation -Value "Email_Conversation" -Description "Internal
SharePoint column name with the 'Conversation'"
Set-PnPStorageEntity -Key SentDate -Value "Email_SentDate" -Description "Internal SharePoint
column name with the 'Sent date' details"
Set-PnPStorageEntity -Key ReceivedDate -Value "Email_ReceivedDate" -Description "Internal
SharePoint column name with the 'Received date' details"
Set-PnPStorageEntity -Key hasAttachment -Value "Email_Attachments" -Description "Internal
SharePoint column name for 'Attachment' details"
Set-PnPStorageEntity -Key Importance -Value "Email_Importance" -Description "Internal SharePoint
column name with the 'Importance' details"
Set-PnPStorageEntity -Key Sensitivity -Value "Email_Sensitivity" -Description "Internal SharePoint
column name with the 'Sensitivity' details"
Set-PnPStorageEntity -Key Categories -Value "Email_Categories" -Description "Internal SharePoint
column name with the 'Categories' details"
Set-PnPStorageEntity -Key EmailNameSyntax -Value "<Subject>_<SentDate>" -Description "Name
convention for emails"
Set-PnPStorageEntity -Key UTCOffset -Value "12:00" -Description "UTC offset is the difference in hours
and minutes between Coordinated Universal Time and local time in the format hh:mm"
Set-PnPStorageEntity -Key OfficeCacheLocation -Value
"https://slimapplications.sharepoint.com/sites/emailmanager/Cache" -Description "Absolute url to
the cache library (excl. /forms part)"
Set-PnPStorageEntity -Key AttachmentLabels -Value "No,Yes" -Description "Comma separated list with
display values for the present of attachments"
Set-PnPStorageEntity -Key ImportanceLabels -Value "Low,Normal,High" -Description "Comma
separated list with display values for the email's importance"
```

Set-PnPStorageEntity -Key SensitivityLabels -Value "Normal,Personal,Private,Confidential" -Description "Comma separated list with display values for the email's sensitivity"
Set-PnPStorageEntity -Key EmailContentTypeName -Value "SLIM Email" -Description "Name of the content type for emails. (optional)"
Set-PnPStorageEntity -Key ShowOpenInApp -Value "true" -Description "Show 'Open in app' button to provide integration with local email client. Values true|false. Default behaviour is false."
Set-PnPStorageEntity -Key AutomaticMetadataExtraction -Value "true" -Description "Enable/disable extraction of email metadata"
Set-PnPStorageEntity -Key ShowViewEmailIcons -Value "true" -Description "Show View email icon"
Set-PnPStorageEntity -Key EmailHeaderPresentation -Value "SharePointOnline" -Description "Presentation email header"
Set-PnPStorageEntity -Key EmailBodyPresentation -Value "HTML,Plain Text" -Description "Presentation email body preference"
Set-PnPStorageEntity -Key ShowAboutLink -Value "true" -Description "Display About link"
Set-PnPStorageEntity -Key ShowHelpLink -Value "true" -Description "Display Help link"
Set-PnPStorageEntity -Key HelpContents -Value "Visit the Help page for instructions"
Set-PnPStorageEntity -Key AutoCompleteDraftEmails -Value "true" -Description "Autocomplete using draft as subject and upload date as sent date" -Description "Show help instructions or a link"
Set-PnPStorageEntity -Key ShowBcc -Value "true" -Description "Show Bcc field"

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Appendix B PnP script to show email properties

```
Get-PnPStorageEntity -Key From
Get-PnPStorageEntity -Key FromAddress
Get-PnPStorageEntity -Key To
Get-PnPStorageEntity -Key ToAddress
Get-PnPStorageEntity -Key CC
Get-PnPStorageEntity -Key CCAddress
Get-PnPStorageEntity -Key BCC
Get-PnPStorageEntity -Key BCCAddress
Get-PnPStorageEntity -Key MessageID
Get-PnPStorageEntity -Key Subject
Get-PnPStorageEntity -Key Conversation
Get-PnPStorageEntity -Key SentDate
Get-PnPStorageEntity -Key ReceivedDate
Get-PnPStorageEntity -Key hasAttachment
Get-PnPStorageEntity -Key Importance
Get-PnPStorageEntity -Key Sensitivity
Get-PnPStorageEntity -Key Categories
Get-PnPStorageEntity -Key EmailNameSyntax
Get-PnPStorageEntity -Key UTCOffset
Get-PnPStorageEntity -Key OfficeCacheLocation
Get-PnPStorageEntity -Key AttachmentLabels
Get-PnPStorageEntity -Key ImportanceLabels
Get-PnPStorageEntity -Key SensitivityLabels
Get-PnPStorageEntity -Key EmailContentTypeName
Get-PnPStorageEntity -Key ShowOpenInApp
Get-PnPStorageEntity -Key AutomaticMetadataExtraction
Get-PnPStorageEntity -Key ShowViewEmailIcons
Get-PnPStorageEntity -Key EmailHeaderPresentation
Get-PnPStorageEntity -Key EmailBodyPresentation
Get-PnPStorageEntity -Key ShowAboutLink
Get-PnPStorageEntity -Key ShowHelpLink
Get-PnPStorageEntity -Key HelpContents
Get-PnPStorageEntity -Key AutoCompleteDraftEmails
Get-PnPStorageEntity -Key ShowBcc
```

Appendix C PnP script to remove email properties

```
Remove-PnPStorageEntity -Key From
Remove-PnPStorageEntity -Key FromAddress
Remove-PnPStorageEntity -Key To
Remove-PnPStorageEntity -Key ToAddress
Remove-PnPStorageEntity -Key CC
Remove-PnPStorageEntity -Key CCAddress
Remove-PnPStorageEntity -Key BCC
Remove-PnPStorageEntity -Key BCCAddress
Remove-PnPStorageEntity -Key MessageID
Remove-PnPStorageEntity -Key Subject
Remove-PnPStorageEntity -Key Conversation
Remove-PnPStorageEntity -Key SentDate
Remove-PnPStorageEntity -Key ReceivedDate
Remove-PnPStorageEntity -Key hasAttachment
Remove-PnPStorageEntity -Key Importance
Remove-PnPStorageEntity -Key Sensitivity
Remove-PnPStorageEntity -Key Categories
Remove-PnPStorageEntity -Key EmailNameSyntax
Remove-PnPStorageEntity -Key UTCOffset
Remove-PnPStorageEntity -Key OfficeCacheLocation
Remove-PnPStorageEntity -Key AttachmentLabels
Remove-PnPStorageEntity -Key ImportanceLabels
Remove-PnPStorageEntity -Key SensitivityLabels
Remove-PnPStorageEntity -Key EmailContentTypeName
Remove-PnPStorageEntity -Key ShowOpenInApp
Remove-PnPStorageEntity -Key AutomaticMetadataExtraction
Remove-PnPStorageEntity -Key ShowViewEmailIcons
Remove-PnPStorageEntity -Key EmailHeaderPresentation
Remove-PnPStorageEntity -Key EmailBodyPresentation
Remove-PnPStorageEntity -Key ShowAboutLink
Remove-PnPStorageEntity -Key ShowHelpLink
Remove-PnPStorageEntity -Key HelpContents
Remove-PnPStorageEntity -Key AutoCompleteDraftEmails
Remove-PnPStorageEntity -Key ShowBcc
```

Appendix D Configuring properties using a txt file

This section contains instructions to use a txt file to configure the Email Manager App.

Create a text file name EmailManagerProperties.txt and upload this file to the SiteAssets library in the EmailManager site in your tenant. For example,

https://<tenant>.sharepoint.com/sites/emailmanager/siteassets/EmailManagerProperties.txt

```
# Configuration settings for Email Manager 2.6
# Only modify the part after the = character
From=Email_From
FromAddress=Email_FromAddress
To=Email_To
ToAddress=Email_ToAddress
CC=Email_CC
CCAddress=Email_CCAddress
BCC=Email_BCC
BCCAddress=Email_BCCAddress
MessageID=Email_MessageID
Subject=Email_Subject
Conversation=Email_Conversation
SentDate=Email_SentDate
ReceivedDate=Email_ReceivedDate
hasAttachment=Email_Attachments
Importance=Email_Importance
Sensitivity=Email_Sensitivity
Categories=Email_Categories
EmailNameSyntax=<Subject>_<SentDate>
UTCOffset=12:00
OfficeCacheLocation=https://ikapa.sharepoint.com/sites/EmailManager/Cache
AttachmentLabels=No,Yes
ImportanceLabels=Low,Normal,High
SensitivityLabels=Normal,Personal,Private,Confidential
EmailContentTypeName=SLIM Email
ShowOpenInApp=true
AutomaticMetadataExtraction=true
# keep as last line
```

The values in this file are optional. For example, if the email metadata extraction is not required and only the Office cache needs to be set and automatic metadata extraction disabled use the following lines:

```
# Configuration settings for Email Manager 2.6
# Only modify the part after the = character
OfficeCacheLocation=https://<tenant>.sharepoint.com/sites/OfficeCache/Cache
AutomaticMetadataExtraction=false
# keep as last line
```

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Appendix E Using PowerShell to deploy and remove the Email Manager App

This section provides instructions to use PnP PowerShell to deploy the Email Manager SPFx App to all sites in a tenant. Instructions to remove the app from all sites are also included.

The scripts are based on PnP-PowerShell (See https://docs.microsoft.com/en-us/powershell/sharepoint/sharepoint-pnp/sharepoint-pnpcmdlets?view=sharepoint-ps).
First execute the script in a test environment if possible.

Note: if the SharePoint environment uses MFA contact us via info@slimapplications.com for scripts that can handle MFA.

Prerequisites:

1. The Email Manager App has been installed to the tenant App catalog with the checkbox selected for "Make this solution available to all sites in the organization"
2. Account with "Global Administrator" role

Open a PowerShell window with "Run as Administrator" and login as user with global administrator role.

Deploying the App to all sites

```
$tenant = "https://<tenant>.sharepoint.com/"
$cred = Get-Credential
Connect-PnPOnline -Url $tenant -Credentials $cred
$identity = "8c74199f-2255-4b86-8ada-0d0a4a1b36f5"
$sitecols = Get-PnPSiteSearchQueryResults -All foreach($sitecol in $sitecols) {
  Write-Host $sitecol.Title $sitecol.url $sitecol.id
  Connect-PnPOnline -Url $sitecol.url -Credentials $cred
  Install-PnPApp -Identity $identity
}
$sites = Get-PnPSubWeb -Recurse foreach($site in $sites) {
  Write-Host $site.Title $site.url $site.id
  Connect-PnPOnline -Url $site.url -Credentials $cred
  Install-PnPApp -Identity $identity
}
```

Replace <tenant> by your tenant's name

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Removal of the App

Use the below script to remove the App from all sites.

```
$tenant = "https://<tenant>.sharepoint.com/"
$cred = Get-Credential
Connect-PnPOnline -Url $tenant -Credentials $cred
$identity = "8c74199f-2255-4b86-8ada-0d0a4a1b36f5"

$sitecols = Get-PnPSiteSearchQueryResults -All foreach($sitecol in $sitecols) {
  Write-Host $sitecol.Title $sitecol.url $sitecol.id
  Connect-PnPOnline -Url $sitecol.url -Credentials $cred
  Uninstall-PnPApp -Identity $identity
}

$sites = Get-PnPSubWeb -Recurse foreach($site in $sites) {
  Write-Host $site.Title $site.url $site.id
  Connect-PnPOnline -Url $site.url -Credentials $cred
  Uninstall-PnPApp -Identity $identity
}
```

Note: if the SharePoint environment uses MFA contact us via info@slimapplications.com for scripts that can handle MFA.

Appendix F Configuring managed properties

This section describes the configuration of the managed properties to provide users with an Outlook-like search capabilities for email metadata.

Prerequisites:

1. The SharePoint columns to hold the email metadata have been created. See section 3.2.
2. The tenant properties have been configured.
3. Account with permission to modify the SharePoint search configuration.

Instructions:

1. Browse to https://admin.microsoft.com/
2. In the "Admin centers" section (under "Show All") select the "SharePoint" link
3. Select "More features" in the left-hand side navigation and click on "Search" in the Apps section.
4. Click on "Manage search schema"
5. Click "New Managed property"
6. Create a property with the following characteristics
   - in the field property name enter: From
   - type = text
   - searchable: enable checkbox
   - retrievable: enable checkbox
   - queryable: enable checkbox
   At the bottom of the page click "Add a Mapping"
   Search for the crawled property containing the from details, e.g., Email_From
7. Click "Add a Mapping" for the 2nd time
   Search for the crawled property containing the fromaddress details, e.g., Email_FromAddress
8. Click "OK"
9. Repeat steps 5 through 8 for other fields such as:
   - To
   - Subject
   - CC
   - Sent
   - Received
   - hasattachment
   Note: use type = text for all cases

Testing:

1. Upload multiple emails and wait a short while for the emails to get indexed.
2. Test the various search queries

Appendix G Configuring View icon (additional icon column)

This section describes the configuration of libraries with view icons adjacent to emails.

This enables user to open an email using Email Manager with a single click.

The configuration comprises of 2 parts.

Part 1. Create and configure column
Instructions:

1. Download the json for formatting the custom column:
   https://www.slimapplications.com/wp-content/uploads/2023/01/ViewColumnFormattingAdditionalSPO.zip
2. Unpack the zip file and open the downloaded file in an editor.
3. Create a new column named "View"
   Create a column named "View" of type "Single Line of Text" and under "Column Formatting" paste the contents of the downloaded file.
4. Click "OK"
   Choose the option to add the column to all views (SharePoint Online only).
5. Edit the different views to place the new column "View" as position 3 (after the Name).
   It is also possible to select 2 in order to show the icon in the 2nd column.
6. Add the custom json to the "View" column
   - Expand View header
   - Select Format this column
   - Click Advanced Mode
   - Replace the existing json by the following json code

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Part 2. Configure Email Manager to use the "View" icons to open the Email Manager Views

The change can be made to the static EmailManagerProperties.txt file by adding the parameter ShowViewEmailIcons=true

The change can also be made using PowerShell:

Set-PnPStorageEntity -Key ShowViewEmailIcons -Value "true" -Description "Show View email icon"

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Appendix H Configuring View column (integrated column)

This section describes the configuration of libraries with view icons and regular icons in a single column. This feature allows a user to view an email by simply clicking the email icon. The feature is supported with SharePoint Online and SharePoint 2019.
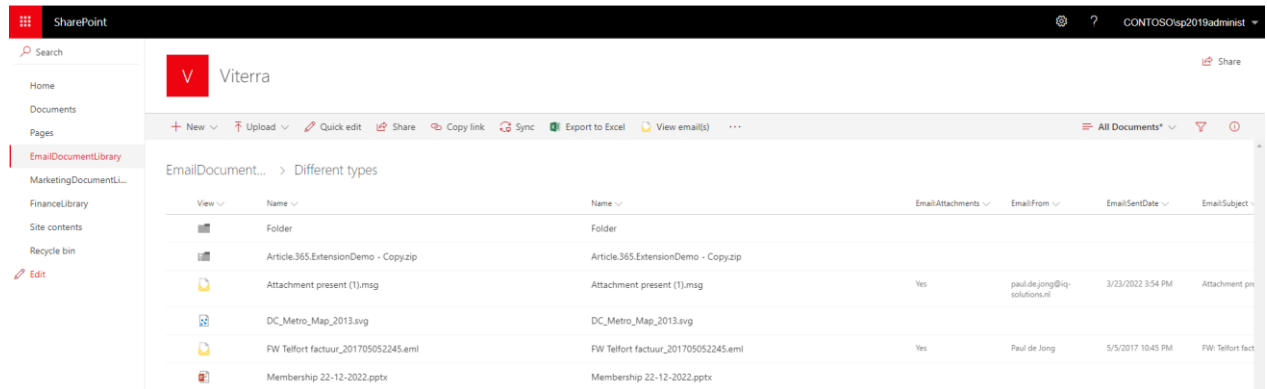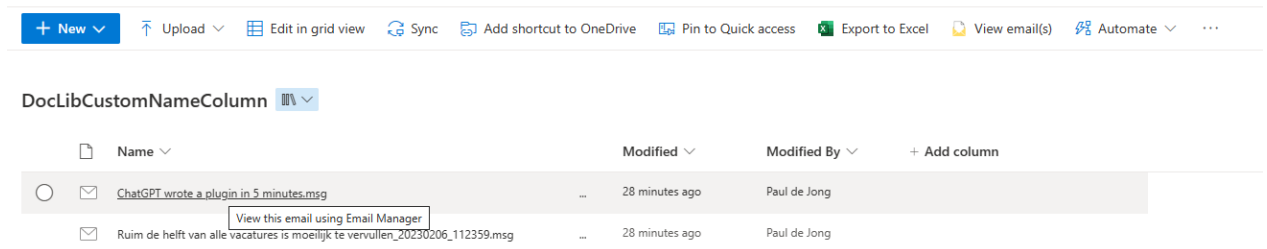

Instructions

1. Download the json for formatting the custom column:
   https://www.slimapplications.com/wp-content/uploads/2023/02/ViewColumnFormatting_1.0.0.zip
2. Unpack the file and open the downloaded file in an editor.
3. Browse to a document library
4. Open the "Library Settings" (via the cog at the top right of the page)
5. In the "Column" section select "Create Column"
6. Create a column named "View" of type "Single Line of Text" and under "Column Formatting" paste the contents of the downloaded file.
7. Click "OK"
8. In the section "Views" click on the "Documents" view
9. Uncheck "Type" and set the position for the "View" column to 1
10. Click "OK"

Note: the custom View column can be used standalone or combined with the Name column. See appendix I.

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Appendix I Configuring Name column (integrated column)

This section describes the configuration of libraries with a custom name column. This feature allows a user to view an email using Email Manager by simply clicking the email name. The other file types are not affected and show the default behavior.

The feature is supported with SharePoint Online and SharePoint 2019. SharePoint 2019 uses an older version of the json schema. As a result it is not possible to show the … to open the context menu for SharePoint 2019. The options from the context menu are also available via the ribbon.

Instructions

1. Download the json for formatting the custom column:
   SharePoint Online: https://www.slimapplications.com/wp-content/uploads/2023/06/SPO_NameColumnFormatting_1.0.3.zip
   SharePoint 2019: https://www.slimapplications.com/wp-content/uploads/2023/02/NameColumnFormattingSP2019_1.0.2.zip
2. Unpack the file and open the downloaded file in an editor.
3. Browse to a document library
4. Expand "Name", select "Column Settings" and "Format this Column"
   Select Advanced and paste the contents of the downloaded file.
5. Close the "Format Name Column" pane
6. Click on an email to check that the Email Manager view opens
7. Click on a non-email to verify that the default behavior is working.

   Note: the custom Name column can be used standalone or combined with the View column. See Appendix H.

Appendix J Localization

Email Manager 2.6.4 and up support localization. The interface can be changed into another language (e.g. French). The default locale is "en-US".

The parameter LocaleValues controls the localization. For example,
LocaleValues=fr-CH
changes the interface for the users to the locale French / Switzerland.

Using a locale requires that a language file is present in the
<tenant>.sharepoint.com/sites/emailmanager/siteassets library with the name <locale>.txt
For example,

```
fr-CH.txt
1   label[0]=Erreur
2   label[1]=Fermer (ou utiliser la touche ESC)
3   label[2]=x
4   label[3]=x
5   label[4]=Impossible de déterminer le jeton d'authentification de sécurité pour le site
6   label[5]=Télécharger
7   label[6]=<br />Contactez le helpdesk.
```

The language file contains about 200x lines that need to be translated.

Note: the buttons in the ribbon such as "View email(s)" are not automatically updated when a locale is used. This requires use of localized version of the sppkg file. This sppkg file will be provided by SLIM Applications on request.

Appendix K Configure Help

The "Help" link can be configured.

The visibility is controlled by the parameter ShowHelpLink. For example, the show the "Help"
add the following line to the EmailManagerProperties.txt or tenant properties
ShowHelpLink=true

The contents of the Help is controlled by the parameter HelpContents.
To show a short description with a link use the following value:
HelpContents=Visit the <a target="_blank"
href="https://www.slimapplications.com/support/">Help page for instructions
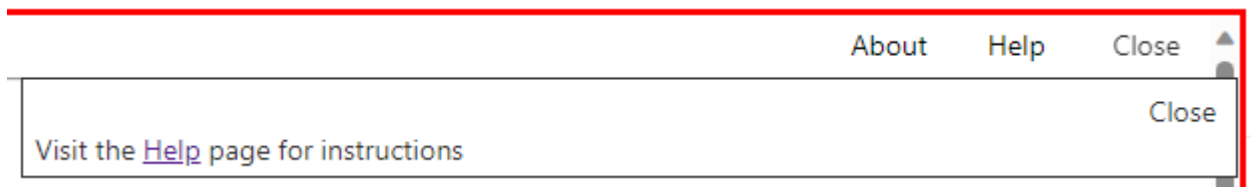
It is also possible to only specify a link. For example,
HelpContents=https://www.slimapplications.com/support/

This will directly open the URL after clicking on the "Help" link.

Appendix L Upload emails to SharePoint 2019 or SharePoint Server SE

Email Manager 2.7.0.0 and up allows users to upload emails directly from Outlook to SharePoint 2019 or SharePoint Server SE.

The following requirements need to be met:
- use of a SP2019 / SharePoint Server SE specific sppkg file
- the following parameters need to be present in the EmailManagerProperties.txt file (or defined as tenant properties):

  ShowUploadEmails=true
  NameColumnFormatting=auto

The Upload button is only shown when 0 items have been selected. Below a screenshot for a French instance where the "Upload email(s)" is named "Télécharger des e-mails".
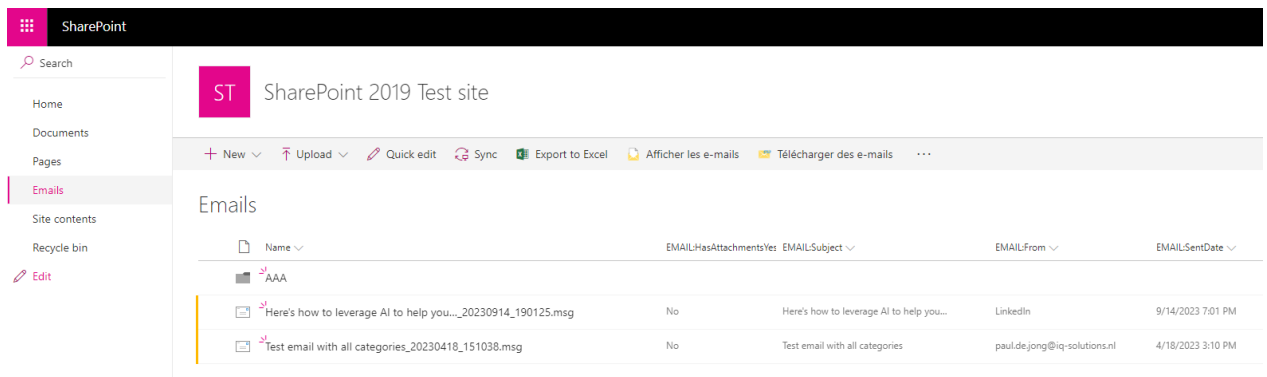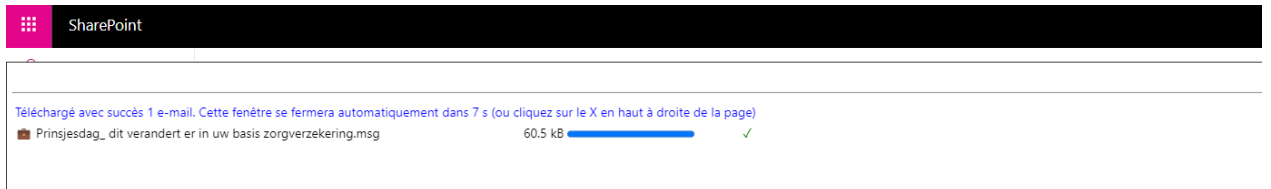
Clicking on the button shows the upload area:

Drag one or more emails.

Upon completion the status is shown

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The dialog will automatically close after 7 seconds.

Appendix M Combine user name + user email

Email Manager 2.8.2.0 and up allows users to capture the user name + user email for From, To, CC and BCC fields. The combined value uses the following syntax:

username A <emailaddressA@company.com>; username B <emailaddressB@company.com>

For example,

To use the feature add the following lines (or a selected lines) to the emailManagerProperties.txt file (or the tenant properties):

AppendAddressFrom=FromAddress

AppendAddressTo=ToAddress

AppendAddressCC=CCAddress

AppendAddressBCC=BCCAddress

Note: copy the lines as is. The values refer to the Email Manager extracted fields and do NOT refer to SharePoint internal columns names.

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Appendix N Improved support for renaming emails

Email Manager 2.8.2.0 and up allows users to rename emails using the following tags:

<CurrentDate>

<CurrentTime>

<UserName>

In the above example emails are renamed based on subject, current date and the user name.

The property in the emailManagerProperties.txt file (or tenant properties) needs to be set to:

EmailNameSyntax=<Subject>_<CurrentDate>_<UserName>

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Appendix O Format date in Email Manager preview

Email Manager 2.8.2.0 and up allows administrators to control the format of the sent date in the preview.

This is controlled by the property "DateTimeFormat". For example, to use the format from the browser add the following line to the EmailManagerProperties.txt file (or tenant properties):

DateTimeFormat=browser

The supported values are:

browser

site

where site is the default value.

Appendix P Improved support for renaming emails

Email Manager 2.8.3.0 and up allows administrators to control the date formatting when renaming emails using email metadata or the <CurrentDate> or <CurrentTime> tags.

This is controlled by the property EmailNameDateFormatting. For example, to use the same format as Harmon.ie add the following line to the EmailManagerProperties.txt file (or tenant properties):
EmailNameDateFormatting=YYYY-MM-DD_hh-mm-ss

where
YYYY denotes the year
MM denotes the month
DD denotes the day
hh denotes the hours
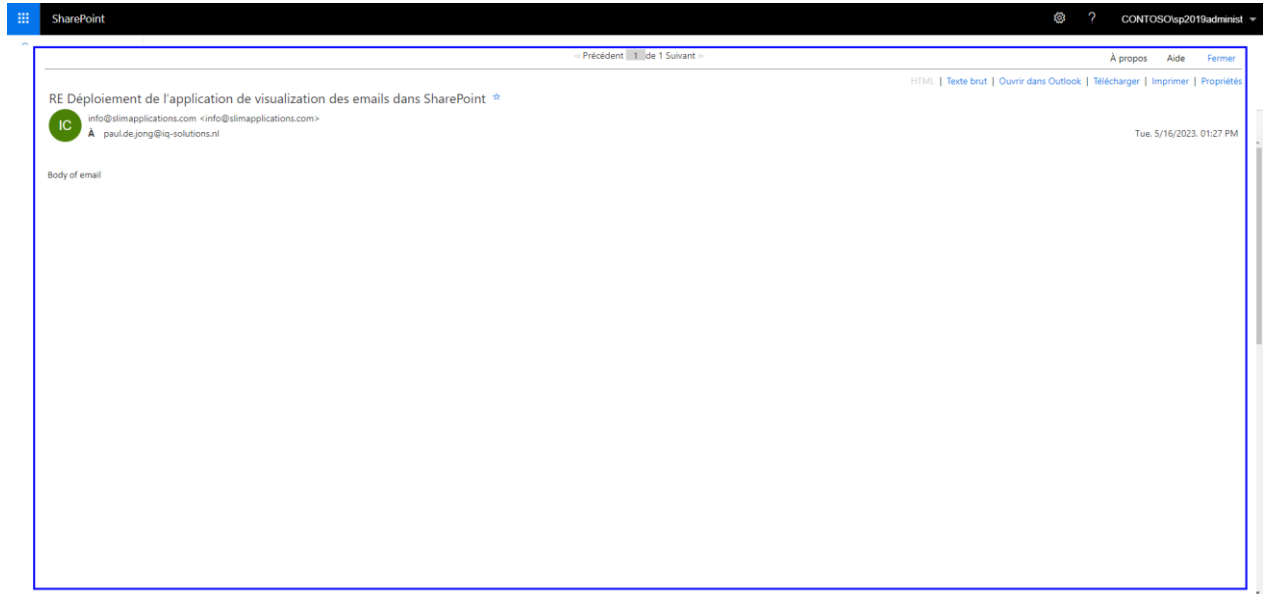mm denotes the minutes
ss denotes the seconds.

The default value is YYYYMMDD_hhmmss

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Appendix Q Control the color of the border in the preview

Email Manager 2.8.3.0 and up allows administrators to control the color of the border in the preview. Below an example where the preview border color has been set to blue.

The color of the border is controlled by the property PreviewBorderColor. For example, to use a blue border add the following line to the EmailManagerProperties.txt file (or tenant properties): PreviewBorderColor=blue

It is also possible to specify a color using a hex notation (e.g., #0000ff). The default value is red.

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