SLIM Applications

Email Manager

User Guide

This document provides an overview of the functionality provided by Email Manager 2.8

2024/02/04

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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, zip, … 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 or added as a links.

This document describes the key features for using the App. More detailed information about the functionality offered and the technical specifications is available via our web site https://www.slimapplications.com/product/email-manager/

The assumptions are made that the App has already been installed and configured by a SharePoint Administrator or a user with sufficient permissions.

Email Manager supports emails in msg and eml format.

2. Getting started

The Email Manager preview can be opened using different methods.

2.1 "View email(s)" button

This method is always available. The "View email(s)" button is visible in the library's ribbon and through the ellipsis menu.

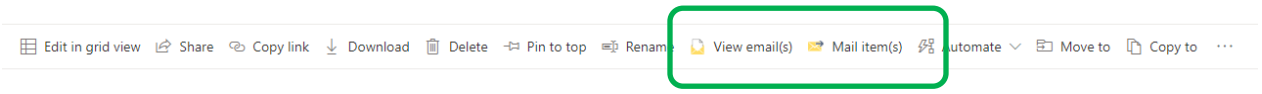

Figure 1. Ribbon in a document library using the Modern view. The Email Manager section in the ribbon is marked in green.

The "View email(s)" button is always visible whereas the "Mail item(s)" is only visible when one or more items have been selected.

2.2 Ellipsis menu

The ellipsis menu (…) for emails contains the options to "View email(s)".

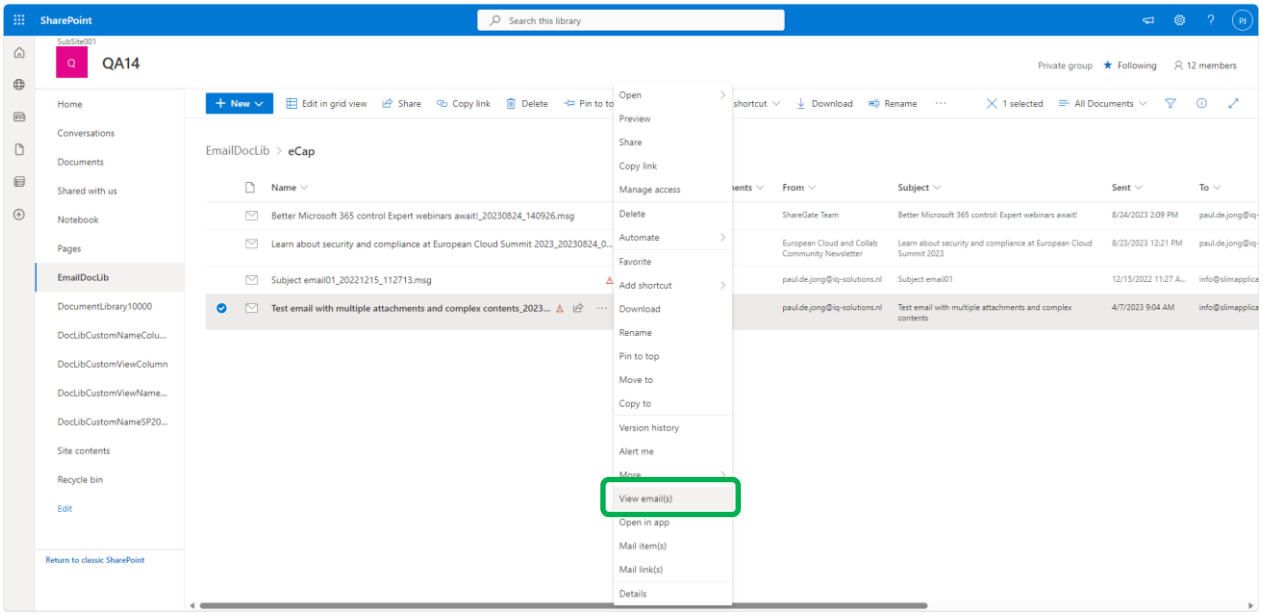

Figure 2. Email Manager "View email(s)" option in the ellipsis menu of an email.

2.3 Click on the email name

This method is only available when it has been configured by your Administrator. This method allows users to simply click on an email name to open the Email Manager Viewer.

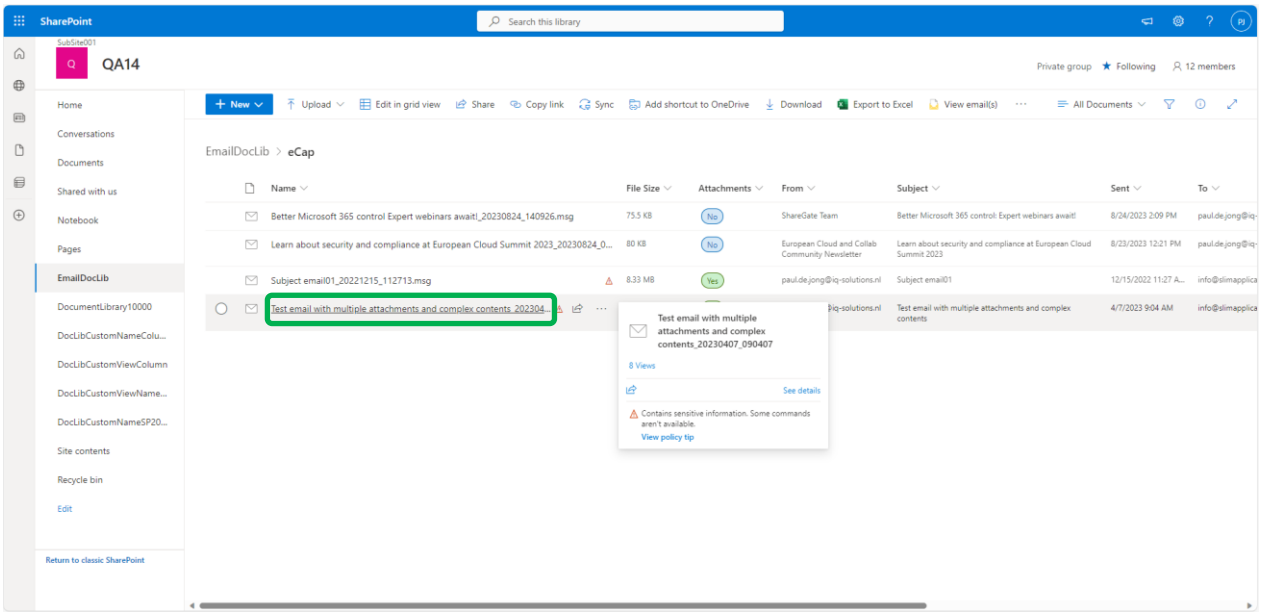

Figure 3. Email Manager where clicking on the email name opens the Email Manager Viewer.

3. Email Manager features

Email Manager can be configured by your administrator to display the email header in a SharePoint Online presentation mode and in an Outlook presentation mode. This is shown in the figures below:

Figure 4. Email Manager configured with the SharePoint Online presentation mode.

The SharePoint Online presentation mode in Email Manager mimics the SharePoint Online preview. The key differences with the standard SharePoint preview are the ability to directly open attachments and the correct time zone of the sent date.

Figure 5. Standard SharePoint Online preview with only attachment names.

The figure below shows the Email Manager using the Outlook presentation mode. In the remainder of this section the screenshots will use the Outlook presentation mode.

Figure 6. Email Manager configured with the Outlook presentation mode.

3.1 View emails

Open an email using one of the methods described in the previous section. This opens a dialog window with the preview of the 1st email.

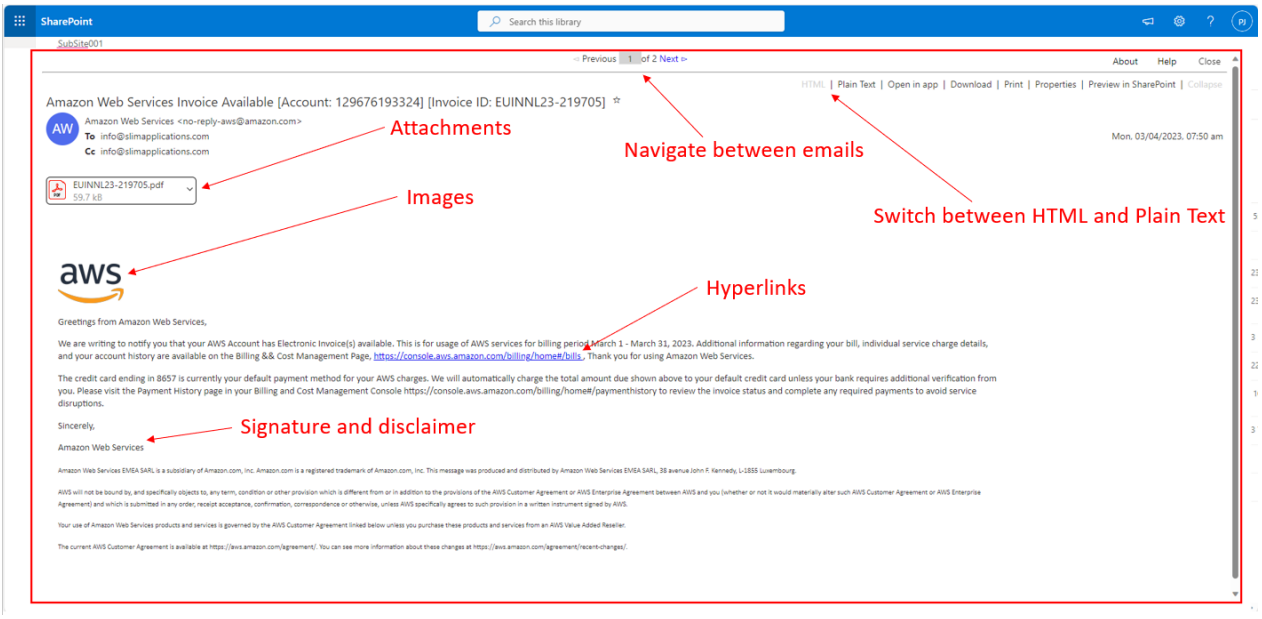

Figure 7. Email Manager with a preview of an email.

The view shows the email's metadata such as To, From, ... and lists the details of the attachments.

The "previous" and "next" buttons at the top of the window provide easy access to the adjacent emails. This right arrow and left arrow buttons on the keyboard also allowing moving to the next or previous emails. Enter the number of an email to jump to that email.

The ☆ icon at the top of the page allows tagging of emails of interest. Upon closing the dialog window these emails are selected for further processing. For example, move to a different location, change properties for these emails, download, …

The "Preview in SharePoint" allows previewing of the current email using standard SharePoint preview. The preview window can be closed by clicking the "Close" at the top right corner or using the ESC key on your keyboard.

3.2 View email attachments

Unlike the standard SharePoint preview the Email Manager allows for direct viewing of email attachments.

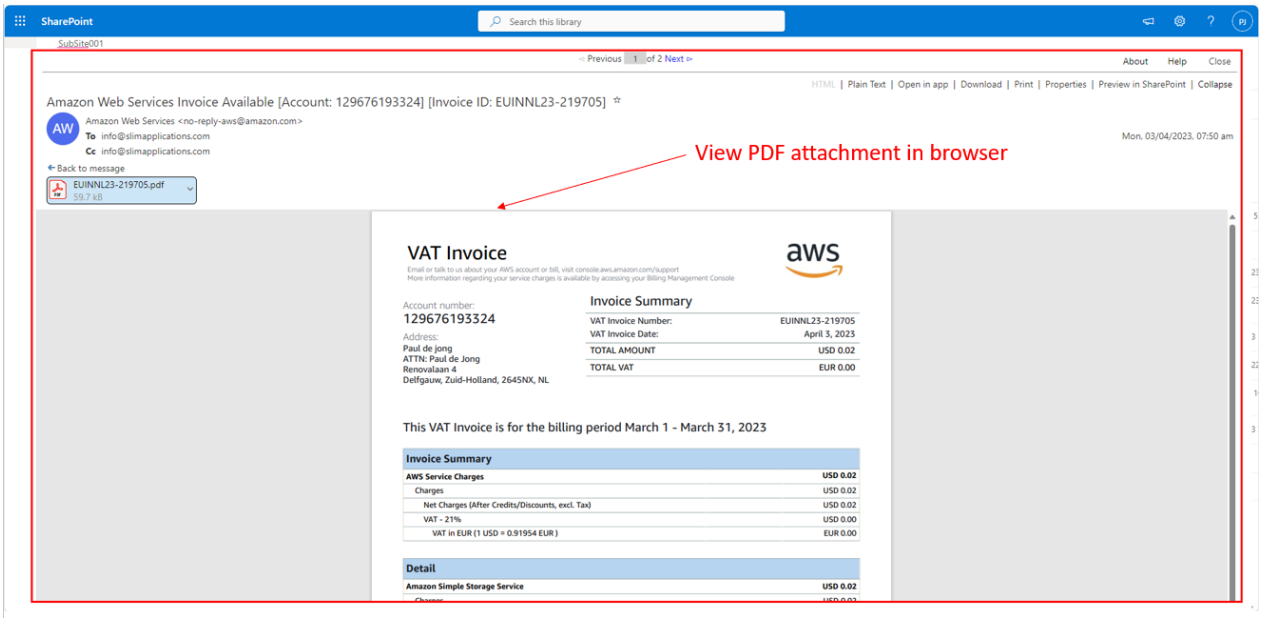

Figure 8. Email Manager with a view of a PDF attachment.

The attachment(s) can also be downloaded individually using the ↓ icon adjacent to the attachment name. The following file formats can be directly shown in the preview window: pdf, png, jpg, bmp, gif, msg. eml, xml and svg. Office file formats (docx, xlsx, pptx, vsdx, doc, xls and ppt) can also be directly shown if the administrator has configured the Office cache.

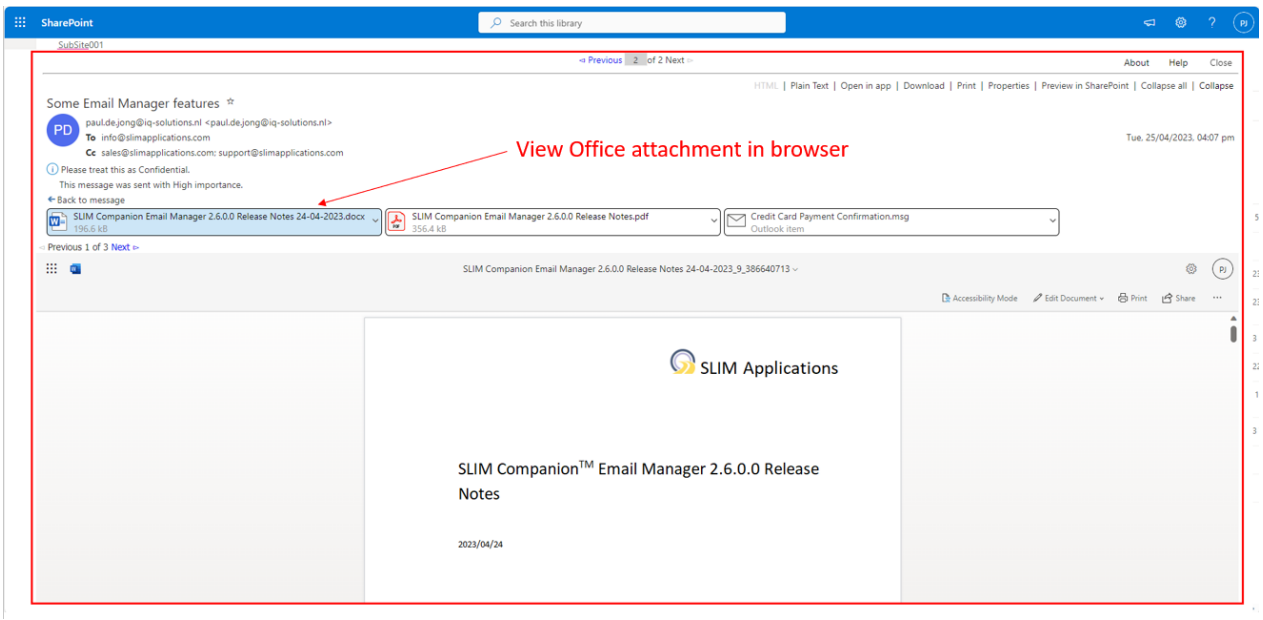

Figure 9. Email Manager with a view of a Word attachment.

In case the file type cannot be directly viewed (tiff, zip, dwg, ...) an option to download the file is shown.

Email Manager also support previewing emails with msg attachments (and their attachments).

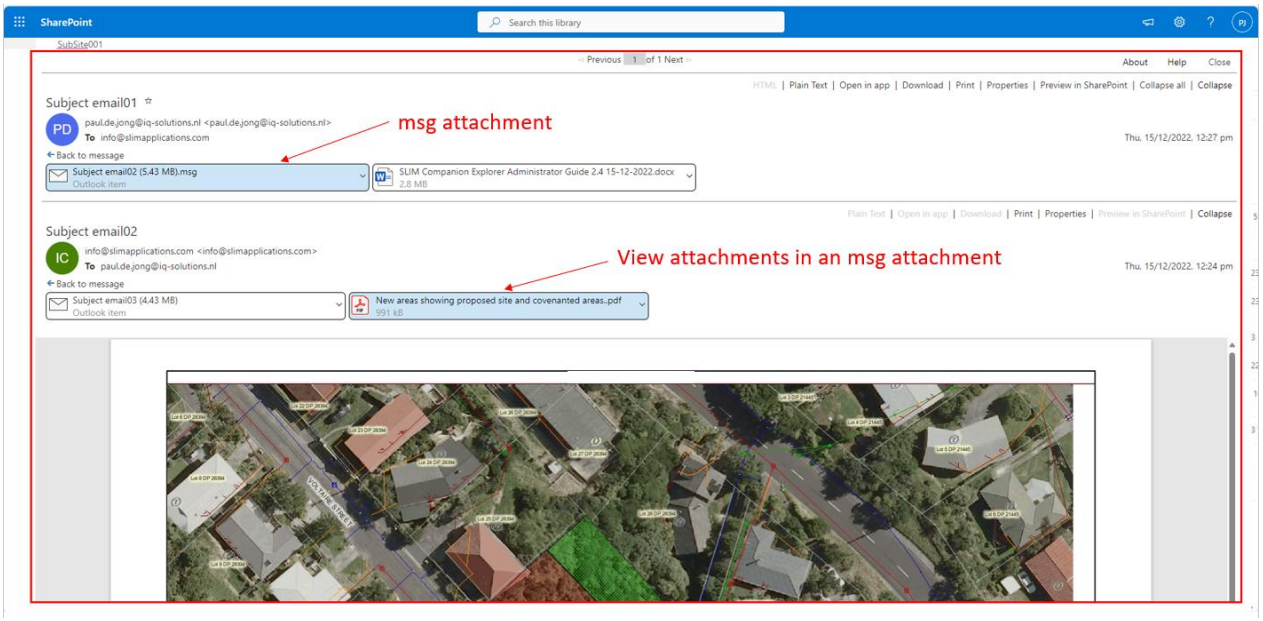

Figure 10. Preview email with an msg attachment containing a PDF attachment.

The contents of zip attachments can also be viewed in the browser.

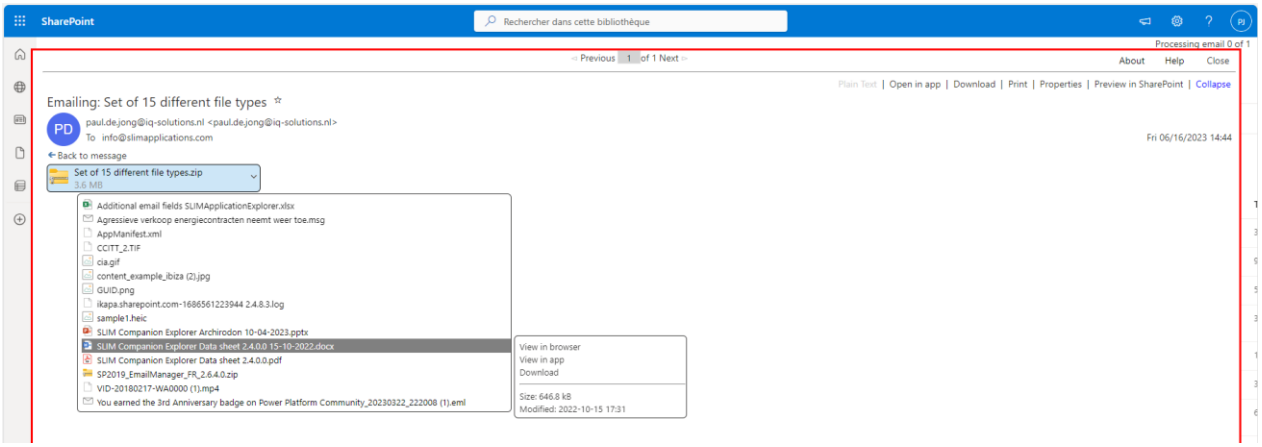

Figure 11. Preview email with a zip attachment.

3.3 Mail item(s) (optional)

SharePoint document(s) can be directly attached to a new email. Select one or more documents and click the “Mail item(s)” button to generate a new email with the selected items attached.

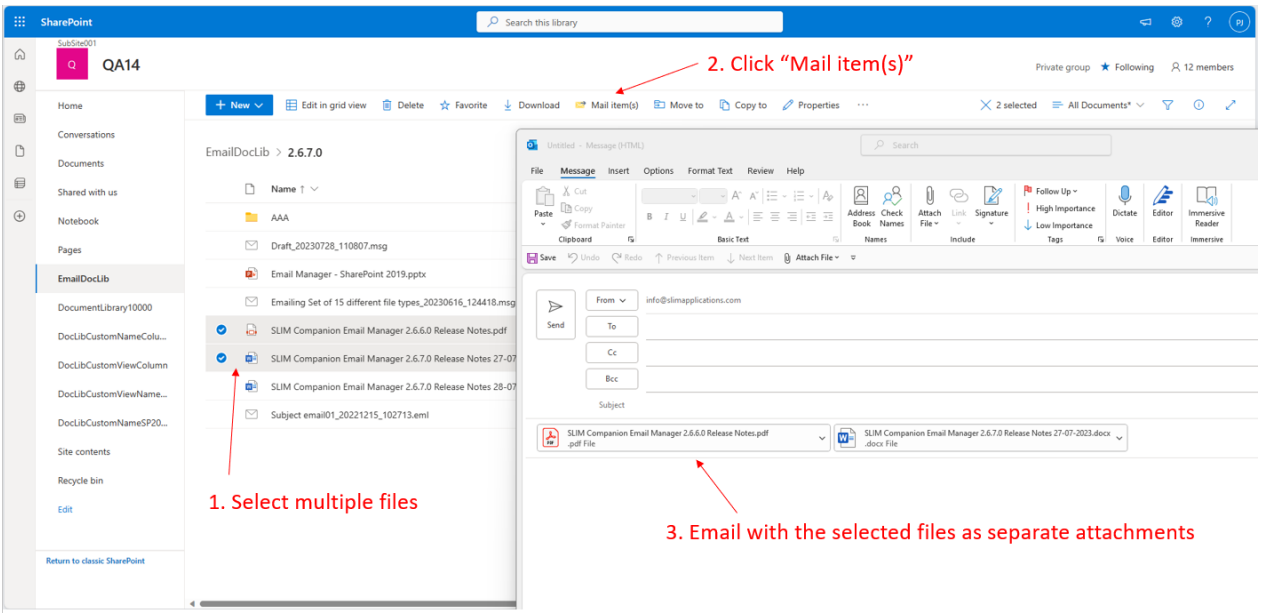

Figure 12. An email with the selected SharePoint document.

Selecting a folder and then clicking “Mail item(s)” will generate a new email with a zip file as attachment with the folder structure. The “Mail item(s)” functionality is limited to 5 documents and a maximum total size of 25 MB.

3.4 Mail link(s) (optional)

Select one or more documents/folders and click the “Mail link(s)” button to generate a new email with links to the selected items. This feature is useful when the recipients have access to the items in SharePoint.

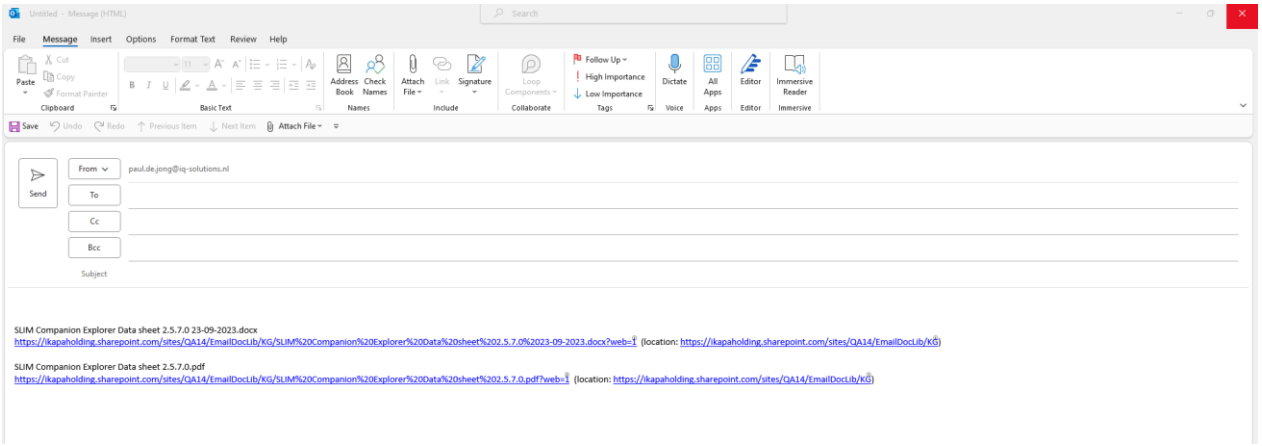

Figure 13. An email with links to the selected SharePoint documents/folders.

3.5 Filtering and sorting columns

The tool can handle filters on column values and sorting orders on columns. The tool will show the same items in the same sort order in the preview window.

3.5 Extracting email metadata (optional)

An optional feature of the tool is the ability to extract email metadata from emails during uploading.

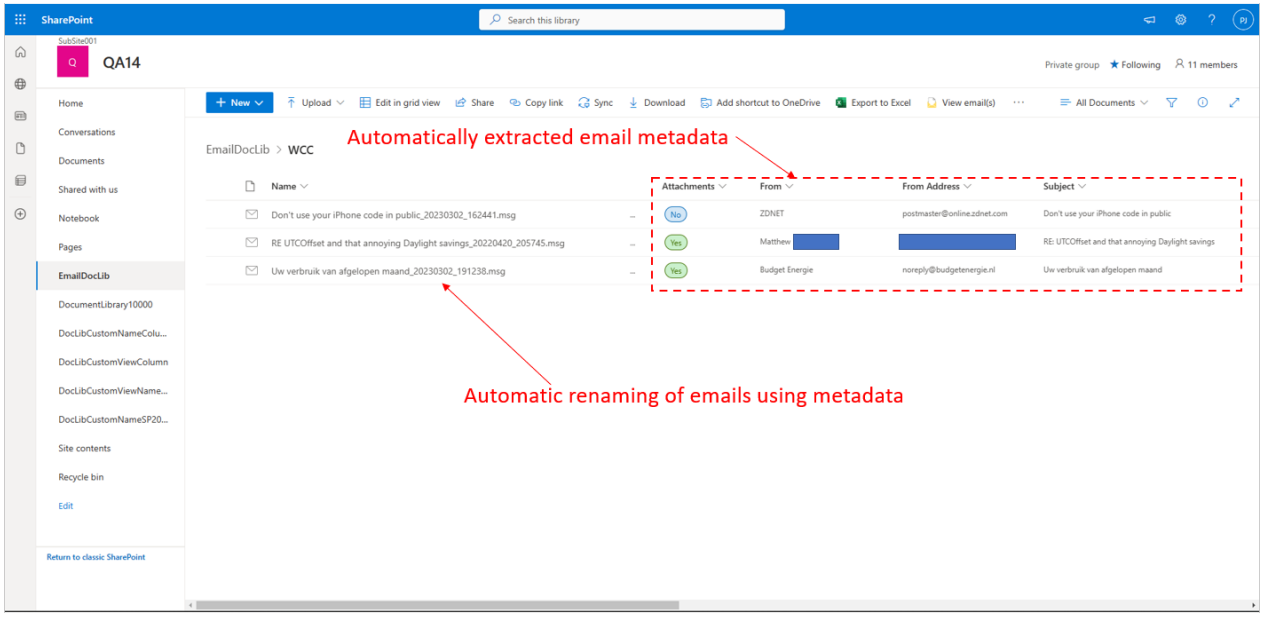

Figure 14. SharePoint modern page with automatically extracted email metadata.

The App can extract commonly used email metadata fields like To, From, Subject, Sent date, … and store the values in SharePoint columns. The Email Manager Administrator Guide (see Resources section in link) provides full details about the capabilities.

Note: the extraction will only be present if this has been explicitly configured by the Administrator. This involves creation of the SharePoint columns and configuration of the mapping.

The metadata will be extracted from emails if they are added to SharePoint using drag and drop (e.g., from Outlook) or using the browser's "Upload" button.

Note: metadata is not automatically extracted from emails added via OneDrive for Business Sync, mobile devices or other tools.

3.6 View email metadata properties

The email metadata present in the email itself can be accessed using “Properties” when viewing an email.

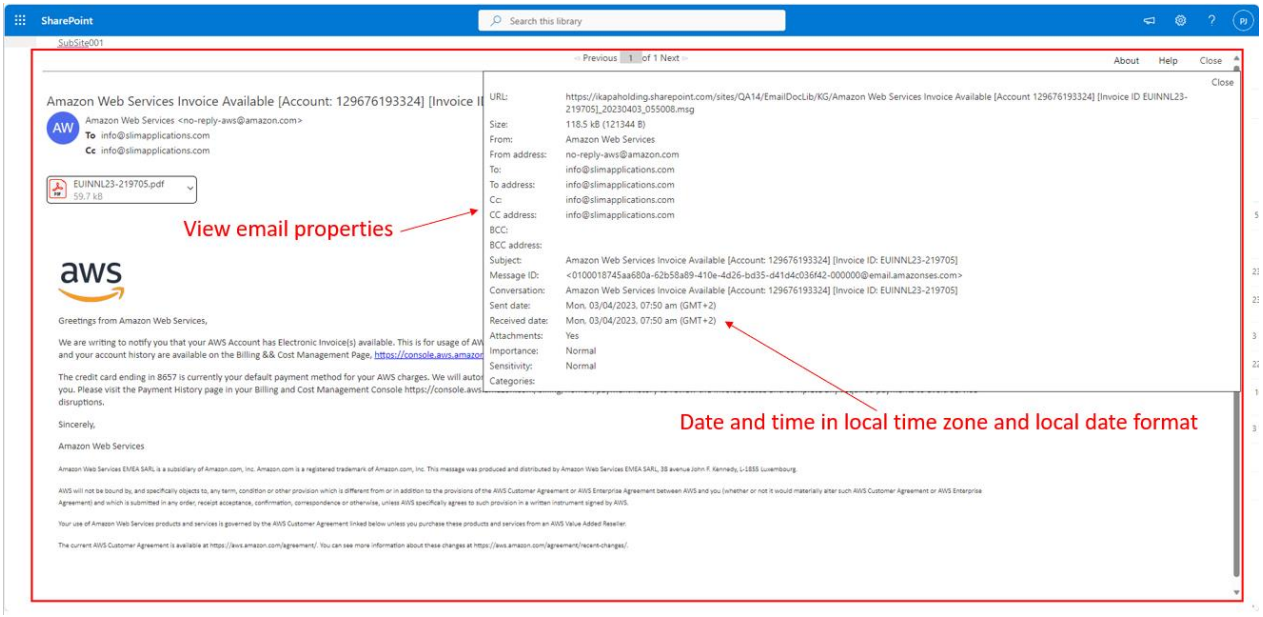

Figure 15. Properties of an email.

Use the “Close” at the top right of the section to close the dialog window.

3.7 Collapse/Expand the email header section

The email header (with the From, Subject details) can be collapsed for an individual email by clicking “Collapse”. The “Collapse all” collapses all emails.

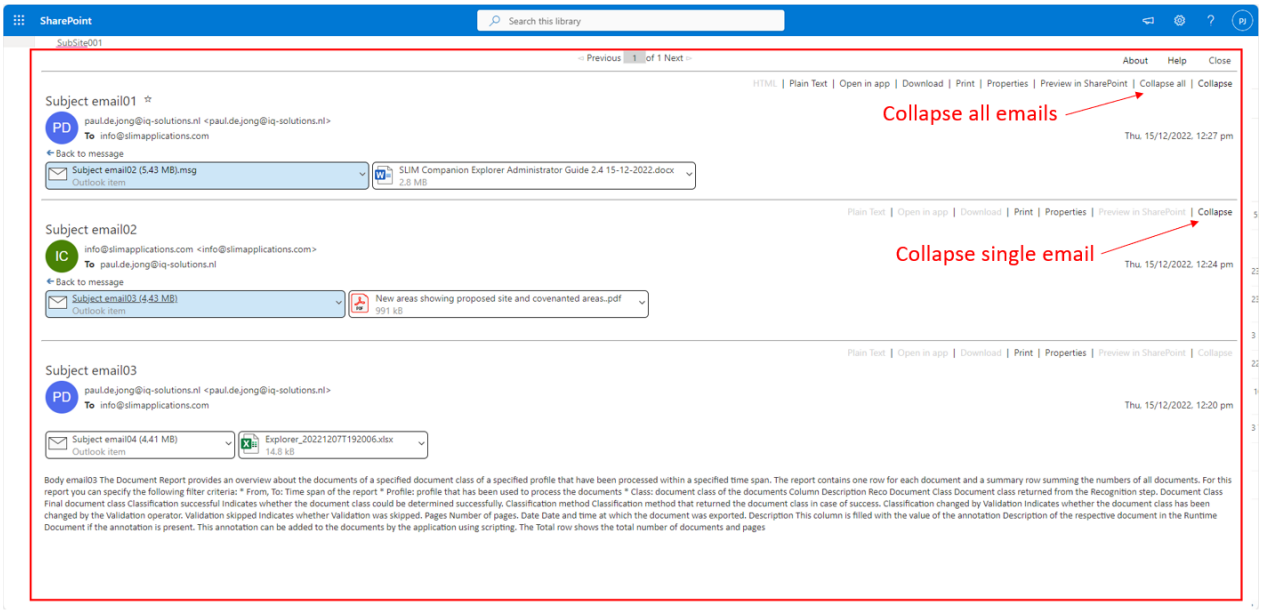

Figure 16. Collapse email header(s) to increase the space available for the email text.

3.8 Open in app (optional)

The “Open in app” button is only visible when this has been configured by your SharePoint Administrator. It is useful when the user computer are configured to directly open emails from the organization’s SharePoint tenant using the local Outlook client.

The button is visible in the ribbon, the ellipsis menu, and the preview dialog and allows opening of the SharePoint email using the local mail client (e.g., Outlook).

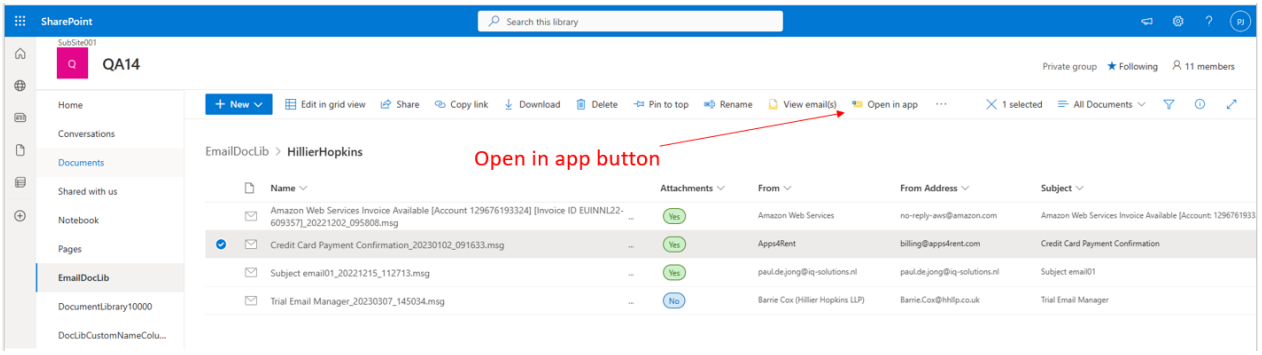

Figure 17. “Open in app” button in the ribbon.

3.9 Search for email metadata (optional)

It is possible to execute Outlook-like searches (from: john) in the regular search bar if Email Manager is configured to extract email metadata and the Administrator has also configured the search.

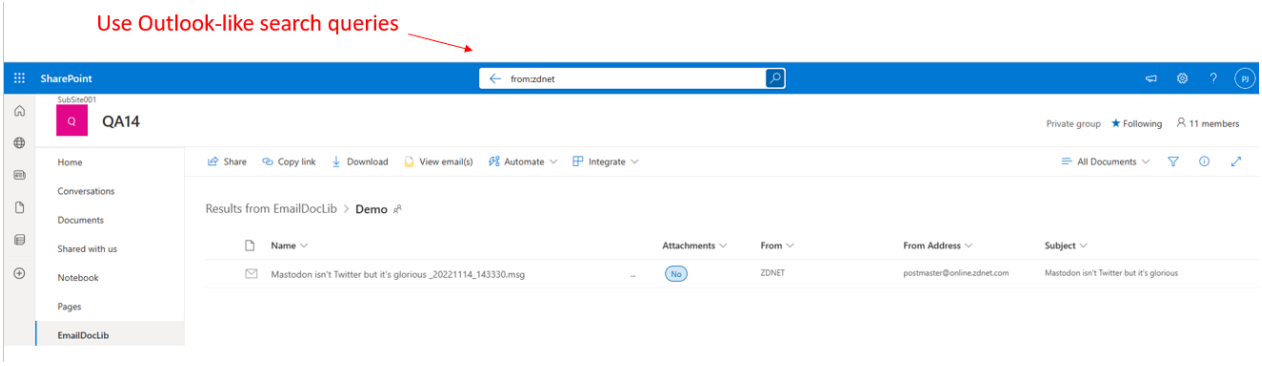

Figure 18. Search for emails using Outlook-like searches.

Other examples are:
Subject: Twitter
Sent:15/11/2022 (change the date syntax to reflect your system)

3.10 Localisation (optional)

Email Manager supports localisation. The buttons and instructions of Email Manager are shown in the selected locale (e.g., fr-CH). This is configured by your SharePoint Administrator.

Note: the format of the date in the Email Manager preview is controlled by the SharePoint Administrator. It can be set to use the format for the site or use the user's browser locale settings.

3.11 Date and time formatting

The dates shown by Email Manager (e.g., Sent Date) can be shown in the format of the site (default) or the user's browser. This setting is controlled by your Administrator.

Note: the Sent Date shown in the email preview is shown in the user's local time zone. This may differ from the Sent Date shown in the standard SharePoint preview which show the time in UTC.

3.12 Supported languages

Email Manager supports viewing msg emails with different languages using HTML.

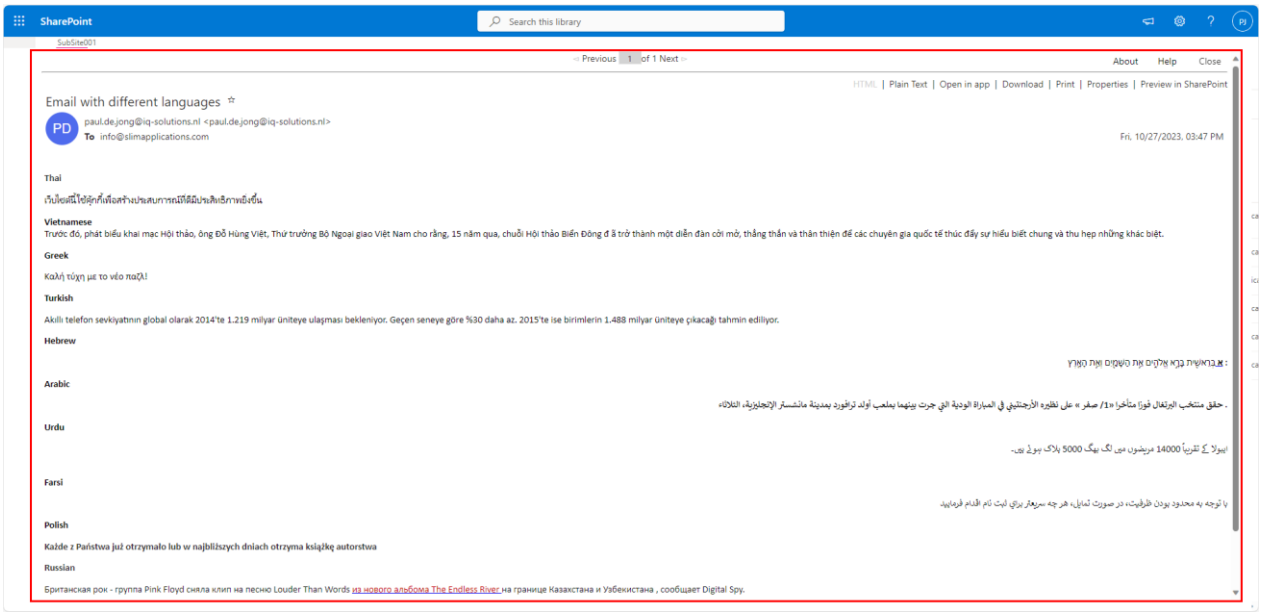

Figure 19. Example of an msg email with different languages.

Using Email Manager to preview emails with different languages avoids the encoding issues that sometimes occur in standard SharePoint preview.

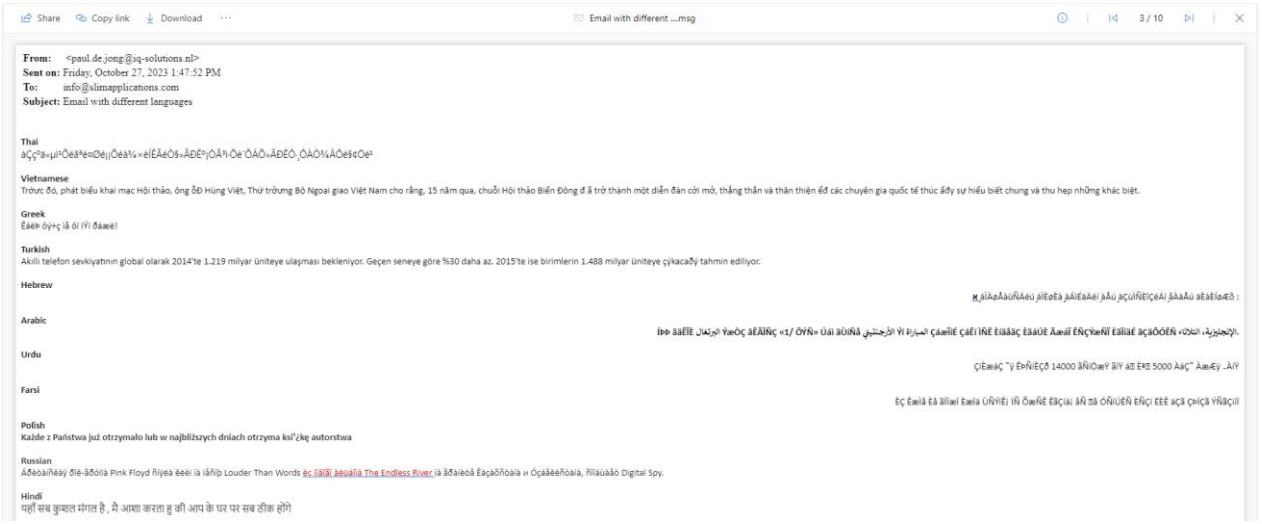

Figure 20. Example of an msg email with different languages using the standard SharePoint preview

3.13 Upload emails to standard SharePoint page and using the Email Manager rename functionality

Uploading emails to the standard SharePoint page (via drag-and-drop or using the “Upload” button) and using the Email Manager renaming functionality may result in conflicts with existing emails.

Email Manager will automatically detect if renaming of an uploaded email will result in a conflict and show a conflict dialog .

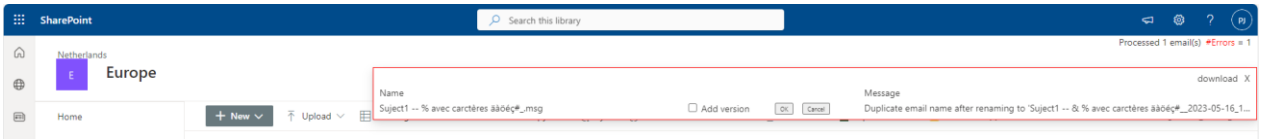

Figure 21. Dialog when an email already exists after renaming.

The user is offered the following options:
a. Add the email as a new version to the existing email: select checkbox + click “OK”
b. Add the email with a unique sequence number like (1): click “OK”
c. Cancel the request and delete the email: click “Cancel”

Note: the uploaded email will not be renamed if the user does not select any of the above options and closes the conflict dialog.

3.14 Upload emails from Outlook to SharePoint 2019

Email Manager allows users to upload emails from Outlook to SharePoint 2019 using drag and drop without an intermediate step to save emails locally. After clicking the “Upload email(s)” button in the ribbon the SharePoint 2019 page allows users to drag and drop emails from Outlook.

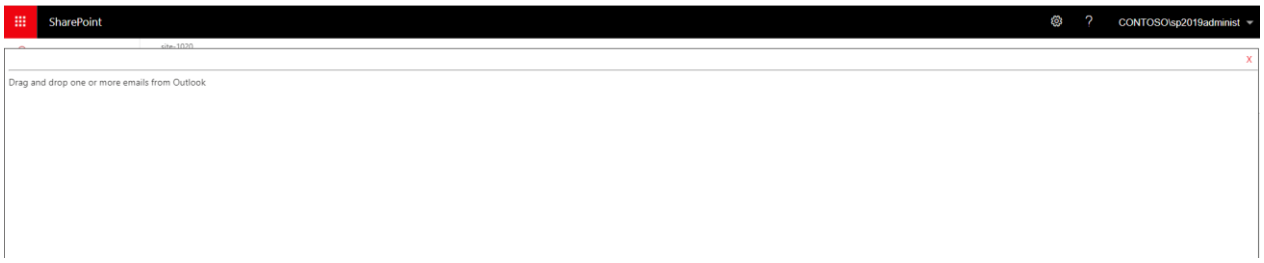

Figure 22. “Drag and drop” area in SharePoint 2019.

Figure 23. Uploading multiple emails using “drag and drop” in SharePoint 2019.

When an email already exists a dialog window is displayed (similar to Harmon.ie) with the options to add the email as a new version, append a unique sequence like (1) or cancel the upload request.

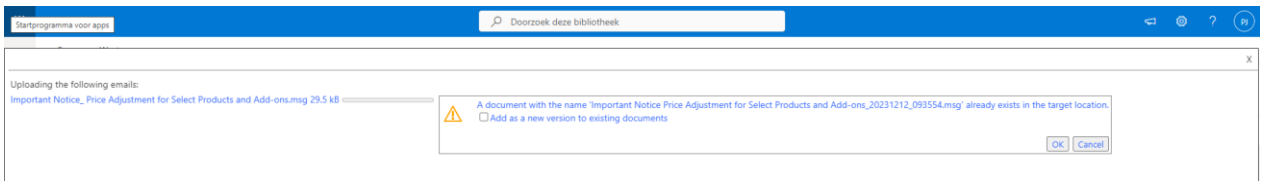

Figure 24. Dialog when an email already exists in SharePoint 2019.

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4. Other information sources

FAQ's: link
Knowledge Base: link
Other enquiries: info@slimapplications.com

SLIM Applications B.V.
Rotterdamseweg 402Y
2629 HH Delft, The Netherlands
www.slimapplications.com
info@slimapplications.com