



SLIM Companion™ Email Manager

User Guide

This document provides an overview of the functionality provided by SLIM Companion Email Manager 2.3

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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, ... 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.

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

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

2. Getting started

2.1 Open SLIM Companion Email Manager

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

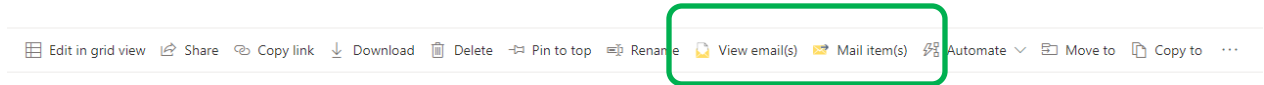


Figure 1. SLIM Companion Email Manager in a document library using the Modern view. The SLIM Companion Email Manager section in the ribbon is marked in green.

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

The SLIM Companion Email Manager functionalities are also available under the ellipsis menu. For example, for a document the options “Mail item(s)” is added.

Documents

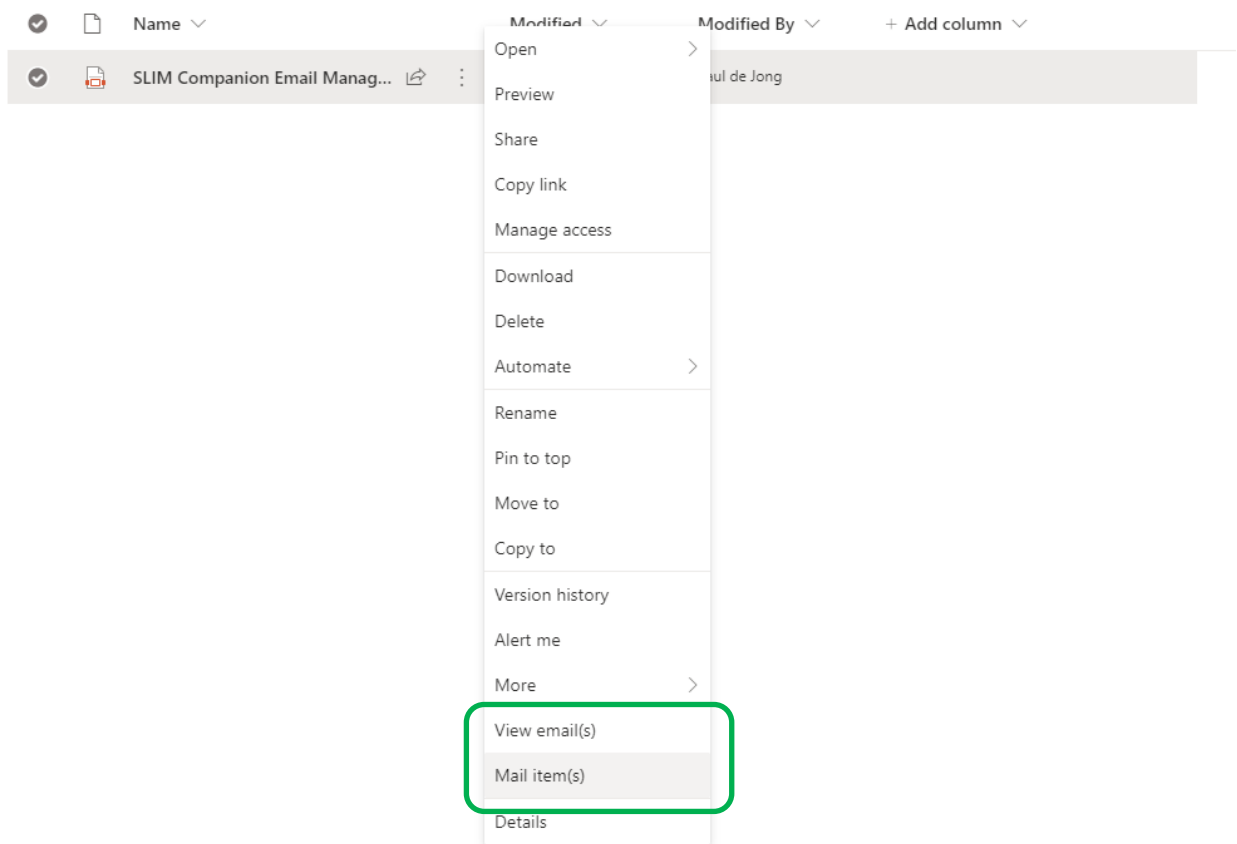


Figure 2. SLIM Companion Email Manager additional options (marked in green) in the ellipsis menu of a document.

3. Email Manager features

3.1 View emails

Select one or more emails in the document library and click the “View email(s)” button. This opens a dialog window with the preview of the 1st email.

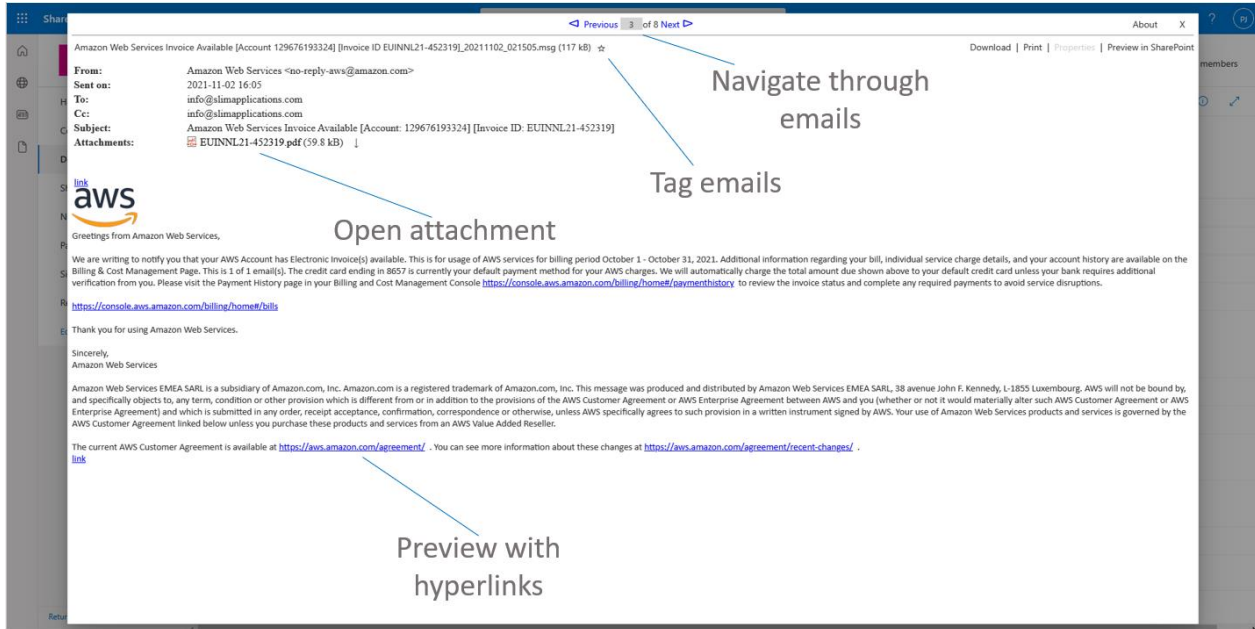


Figure 3. Email Manager with a preview of an email.

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. This may be useful in cases when the email formatting is complex (e.g., tables, lots of images, ...) and the Email Manager preview is not sufficient. Hyperlinks in the emails are shown and open in a different tab.

The preview window can be closed by clicking the X at the top right corner or using the ESC key on your keyboard.

3.2 View email attachments

Unlike standard SharePoint preview the email attachments can be opened directly. Clicking on the attachment will show the attachment in the browser.

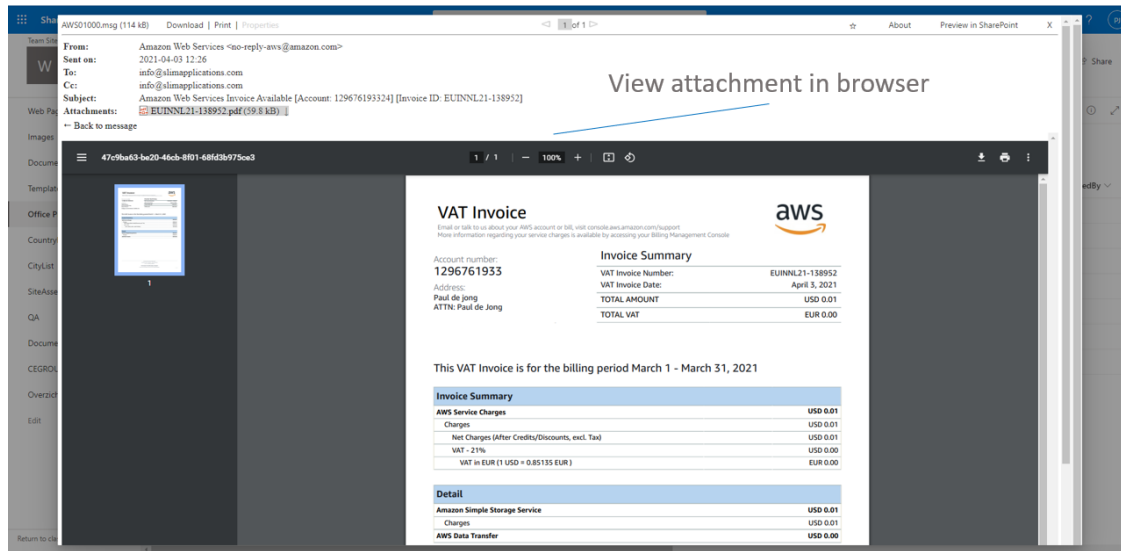



Figure 4. Email Manager with a view of a pdf attachment.

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.

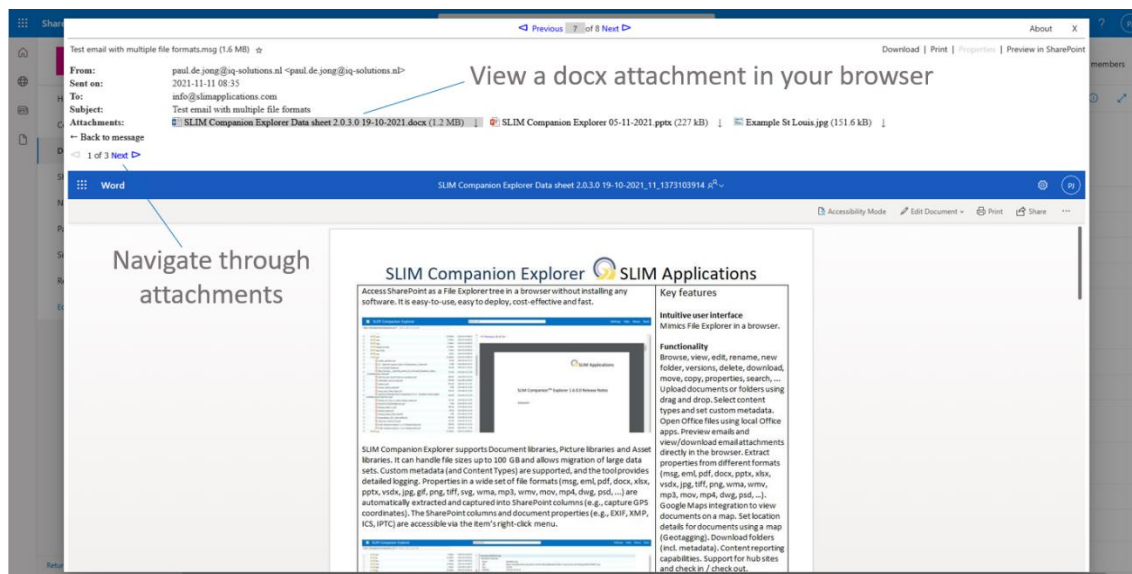


Figure 5. Email Manager with a view of a Word attachment.

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

3.3 Mail item(s)

SharePoint document(s) or folders can be directly attached to a new email.

Select one or more documents and click the “Mail item(s)” button. This generates a new email with the selected items attached.

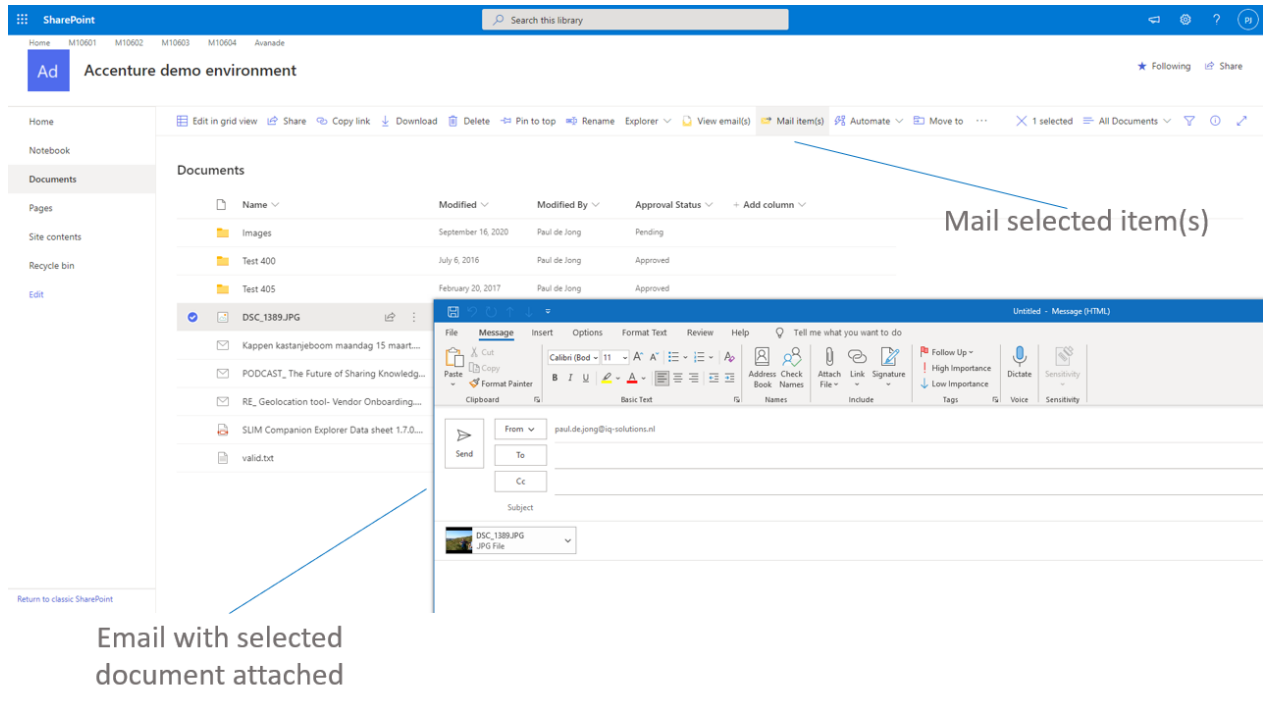


Figure 6. An email with a zip file as attachment is generated In case multiple documents are selected.

3.4 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.

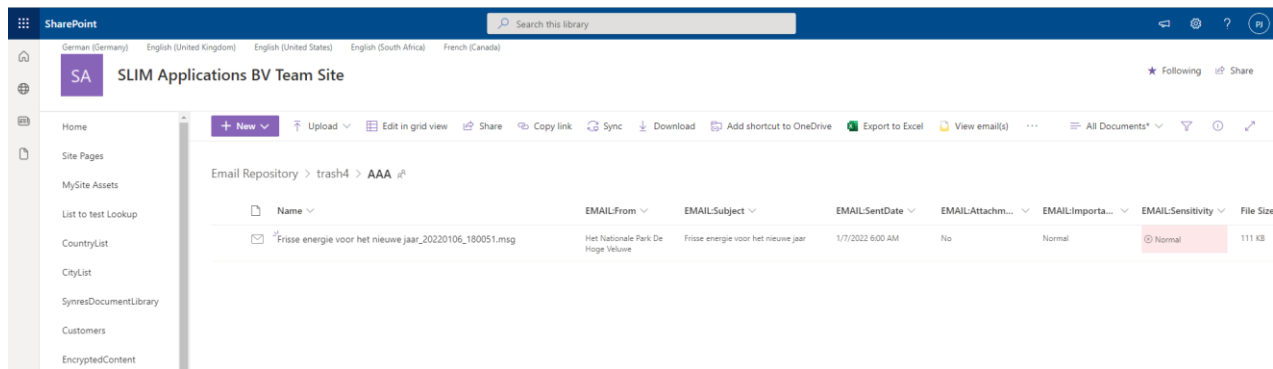


Figure 7. SharePoint modern page with automatically extracted email metadata.

The App can extract commonly used email metadata fields like To, From, Subject, Sent date, ... and store the values in SharePoint columns. The SLIM Companion Email Manager Administrator Guide ([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 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 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.

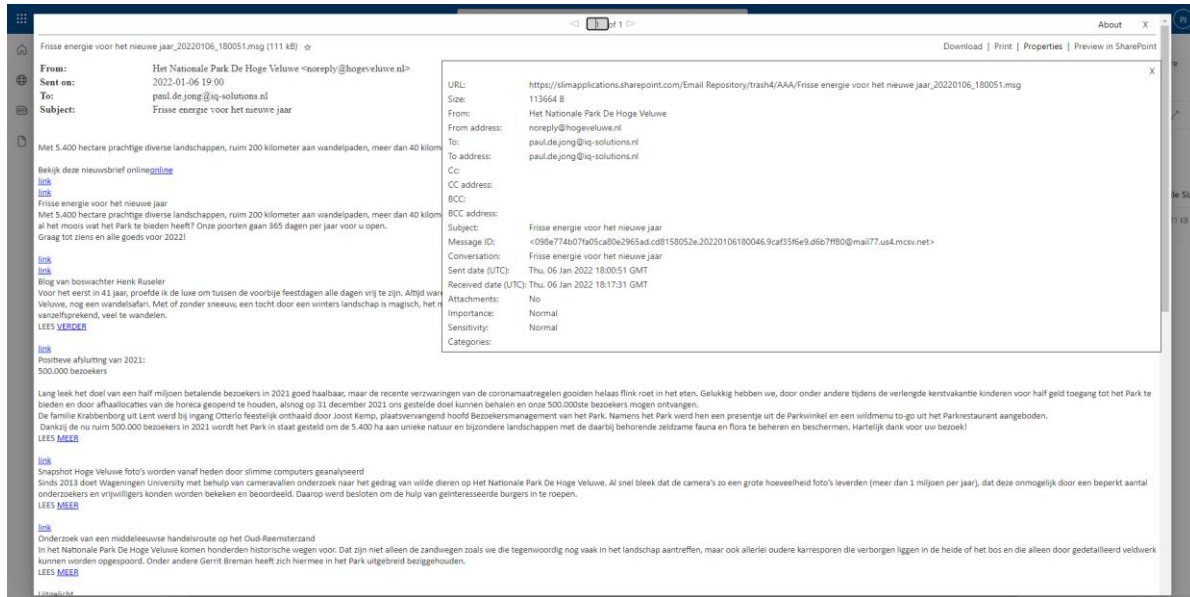


Figure 8. Properties of an email.

Use the X at the top right of the section to close the dialog window.

4. Other information sources

FAQ's <https://www.slimapplications.com/support/>

Knowledge Base: <https://slimapplications.zendesk.com/hc/en-us/categories/115000050605-SLIM-Companion-Email-Manager>

Other enquiries: info@slimapplications.com

SLIM Applications
Mijnbouwstraat 120
2628 RX Delft, The Netherlands
www.slimapplications.com
info@slimapplications.com