SLIM Applications

BulkMetadataManager 1.0.13 Release Notes

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1. Introduction

This document describes the release notes for BulkMetadataManager 1.0.12 and provides the latest information on the SharePoint tool.

2. About BulkMetadataManager

BulkMetadataManager is a node.js application that uses REST API to interact with SharePoint. The tool can extract properties from documents stored in SharePoint and capture the values into SharePoint columns. This allows for optimal use of the metadata for searching, filtering, sorting etc… and this results in increased user productivity and adoption.

The documents that need to be processed are selected using a CAML query. The tool is optimized for performance by using parallel requests, caching, and batch requests. It also caters for SharePoint throttling (429 responses) and the tool can handle large list exceeding the list view threshold.

The WhatIf option allows for running the tool without the final step to add the metadata into SharePoint columns. The extracted metadata is saved into a csv for further review and analysis.

The target audience for this document comprises SharePoint architects, SharePoint administrators and site collection administrators.

3. Supported Environments

This section provides information on the supported environments. The tool is a node.js application and runs on a separate system, it does not require installation of software on SharePoint. The installation instructions are described in "BulkMetadataManager 1.0. Administrator Guide".

3.1 Supported Operating Systems

BulkMetadataManager is supported on the following operating systems.

Operating system	Supported	Notes
Windows 10	✓	
Windows 11	✓	
Windows Server 2016	✓	
Windows Server 2019	✓	
Windows Server 2022		

Operating systems not listed are not supported.

3.2 Supported SharePoint Versions

The following SharePoint versions are supported.

Versions	Supported	Notes
SharePoint Online (Office 365)	✓	

SharePoint versions not listed have not been tested and are not supported.

3.3 Supported Authentication methods

The following authentication methods are supported.

Method	Supported	Notes
SharePoint App-Only* authentication	✓	

*Using clientID and clientSecret

Other authentication methods not listed are not supported.

4. Releases

This section provides an overview of the new features and bug fixes per release.

4.1 Bug fix release (1.0.13)

1. Change in parameter naming convention to circumvent conflicts with Email Manager.
    The optional field EmailNameSyntax containing the email naming syntax needs to be changed to EmailNameSyntaxBulkMetadataManager.

4.2 Feature and bug fix release (1.0.11)

1. Support for using a default user account as "Modified By" when the item's existing "Modified By" value is "SharePoint App".
    This feature also circumvents errors when updating the "Modified" and "Modified By" columns using the "Modified By" value app@sharepoint. This username cannot be resolved by SharePoint and will result in an error for both columns.
    The default user account needs to be specified via the tenant properties or the static properties.txt file and the key is named "ModifiedByDefault".
2. Fix bug preventing the extraction of email metadata in emails with attached msg files.

4.3 Bug fix release (1.0.10)

1. Circumvent bug in SharePoint's $batch requests where URL's are case sensitive. This avoids http 401 responses with "invalid request".

4.4 Bug fix release (1.0.9)

1. Fix bug affecting msg files where metadata is present as non-Unicode characters.

4.5 Feature and bug fix release (1.0.8)

1. Use the tenant properties (via StorageEntity) as primary source for configuration settings. If the tenant properties are not available, the application will then try to open the static BulkMetadataManagerProperties.txt file in the SiteAssets library in the root of the tenant.
2. Improved error handling when the specified Content Type is not available.
3. Omit the Client Id's and Client Secrets from the summary log file.

4.6 Bug fix release (1.0.7)

1. Fix bug with processing large number of emails (5000+) in large lists.

4.7 Feature release (1.0.6)

1. Increase the maximum file size for msg file from 50 MB to 75 MB.

4.8 Feature release (1.0.5)

1. Increase the maximum file size for msg file from 25 MB to 50 MB.

4.9 Feature release (1.0.4)

1. Support for keeping the original "Modified" and original "Modified By" details.
   Note: this requires an extra request per item and negatively impacts end-to-end throughput. It should only be used when it adds value.
   Include "Modified", "Modified By" and size details of the original items in the log file.

4.10 Initial release (1.0.0)

1. Support for SharePoint Online with App Only authentication (using ClientID and ClientSecret).
2. Support for extracting email properties (From, Subject, Sent, …) from emails (msg and eml) stored in SharePoint Online and capturing the values into SharePoint columns.
3. WhatIf functionality to test the tool without updating the email metadata in SharePoint.
   The extracted email metadata is written to a csv file for further review and analysis.
4. Select documents for processing using CAML.
5. Optimized performance by using parallel processes, caching, and batch requests.
6. Control performance by setting the number of download and metadata threads.
7. Support for large lists (exceeding list view threshold).
8. Support for continuing after being throttled by SharePoint.
   The requests will automatically start after the specified retry period has expired.
9. Logging.
10. Support for Windows Server 2016 and Windows Server 2019.

5. Known Issues

This section lists known issues.

1. The optimum number of parallel threads for downloads and setting metadata depends on several factors:
   - sizes of the documents involved
   - latency between the system running node.js and SharePoint
   - available bandwidth to the SharePoint system
   - time of the run.
   The throttling limits seems to depend on the load on SharePoint. During non-Office hours the limits seem to be less strict.

   It is recommended to start the tool with 3 download and 3 metadata threads and adjust these values (upwards or downwards) based on the findings.

2. Running the tool multiple times with the flag to update the "Modified By" may result in items showing "SharePoint-app" as the user that has modified the items.

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