

“Manage your SharePoint document metadata in bulk”

BulkMetadataManager extracts properties present within SharePoint documents (e.g., extract subject, sent date, ... from emails) and captures the extracted values into SharePoint columns.

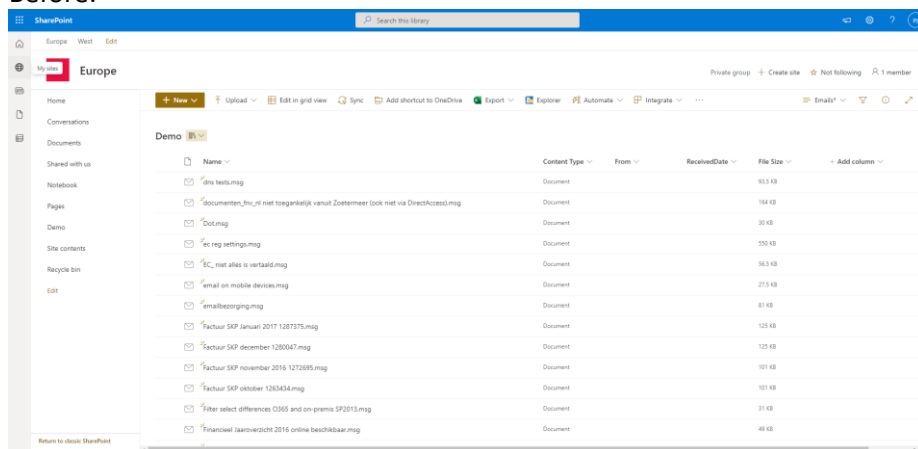
The application enables organizations to get optimum value out of the SharePoint platform and improve productivity and user adoption. Using metadata in SharePoint columns allows for filtering, sorting, grouping and powerful searches.

BulkMetadataManager enables organization to comply with legal conditions by using the actual create/modify dates and not the date when documents were migrated.

Basically, the application:

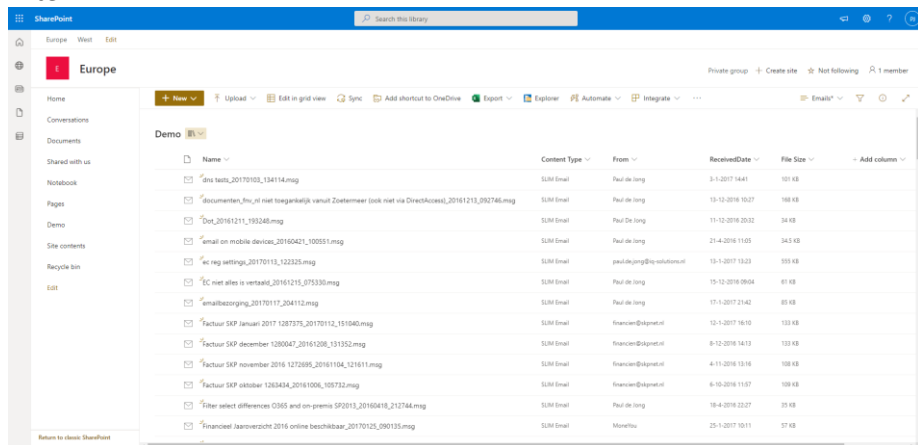
- downloads documents based on a CAML query
- extracts the document properties
- uploads the metadata to SharePoint columns.

The following figures show the email details before and after running the application. Before:



Name	Content Type	From	ReceivedDate	File Size
ins tests.msg	Document			933 KB
documenten_fm_ri niet toegankelijk vanuit Zostermeer (ook niet via DirectAccess).msg	Document			184 KB
Dot.msg	Document			30 KB
ic reg settings.msg	Document			330 KB
ic niet alles is vertaald.msg	Document			363 KB
email on mobile devices.msg	Document			273 KB
emailbezoeking.msg	Document			81 KB
factuur SKP Januari 2017 1287375.msg	Document			123 KB
factuur SKP december 1280047.msg	Document			123 KB
factuur SKP november 2016 1272385.msg	Document			103 KB
factuur SKP oktober 1263434.msg	Document			101 KB
filter select differences OS&S and on-prems SP2013.msg	Document			31 KB
Financieel Jaarversicht 2016 online beschikbaar.msg	Document			49 KB

After:



Name	Content Type	From	ReceivedDate	File Size
ins tests_20170103_13414.msg	SLIM Email	Paul de Jong	3-1-2017 1441	101 KB
documenten_fm_ri niet toegankelijk vanuit Zostermeer (ook niet via DirectAccess)_20161213_092746.msg	SLIM Email	Paul de Jong	13-12-2016 1027	188 KB
Dot_20161211_193248.msg	SLIM Email	Paul De Jong	11-12-2016 2032	34 KB
email on mobile device_20160421_100551.msg	SLIM Email	Paul de Jong	21-4-2016 1103	343 KB
ic reg settings_20170113_122325.msg	SLIM Email	paul.dejong@zostermeer.nl	13-1-2017 1323	333 KB
ic niet alles is vertaald_20161215_075330.msg	SLIM Email	Paul de Jong	15-12-2016 0904	81 KB
emailbezoeking_20170117_204112.msg	SLIM Email	Paul de Jong	17-1-2017 2142	83 KB
factuur SKP Januari 2017 1287375_20170112_151040.msg	SLIM Email	francesca@zoster.nl	12-1-2017 1610	103 KB
factuur SKP december 1280047_20161208_131352.msg	SLIM Email	francesca@zoster.nl	8-12-2016 1413	133 KB
factuur SKP november 2016 1272385_20161104_121611.msg	SLIM Email	francesca@zoster.nl	4-11-2016 1316	108 KB
factuur SKP oktober 1263434_20161006_103732.msg	SLIM Email	francesca@zoster.nl	6-10-2016 1137	108 KB
filter select differences OS&S and on-prems SP2013_20160418_212744.msg	SLIM Email	Paul de Jong	18-4-2016 2227	29 KB
Financieel Jaarversicht 2016 online beschikbaar_20170125_090135.msg	SLIM Email	Manthou	25-1-2017 1011	57 KB

The view only shows part of the added metadata. The application has renamed the emails and has also modified the content type.

BulkMetadataManager features

Functionality

Extract properties from SharePoint documents and capture extracted values into SharePoint columns. Select documents for processing using CAML. Rename documents using extracted metadata (optional) and/or change the content type (optional). Use the application in Whatif mode to extract properties into a local csv without adding the metadata to SharePoint.

Technical

High end-to-end performance by using parallel processes and other optimization techniques. Typical throughput is 10 documents per second. Support for throttling and suitable for use with large lists exceeding list view threshold. Scale out by using additional systems.

Deployment

Install Node.js and the BulkMetadataManager application on a separate computer. Configure the metadata mapping using tenant properties or static properties file.

Supported environments

BulkMetadataManager supports emails, Office files and PDF files stored in SharePoint Online.

Metadata

BulkMetadataManager support extraction of 17 properties from emails (e.g., Subject, From, Sent date, attachments, ...). There are 29 properties that can be extracted from Office files (e.g., Title, Subject, Company, Last Modified ,...). For PDF files the application supports extracting 19 properties (e.g., Title, keywords, Modified, ...).

Logging

The application generates multiple log files: the summary log file contains high level details and there is a detailed log file with the results for the individual documents.

Performance

The application is optimized for performance by using parallel processes for downloading documents and setting metadata, caching and other optimization techniques. Under optimal conditions the application can handle 10 documents per second. The architecture allows for scaling out by using separate computer systems.

BulkMetadataManager can handle throttling by SharePoint Online and will automatically resume after the retry-after period has expired. BulkMetadataManager also supports large lists exceeding the list view threshold (5000 items).

WhatIf

The WhatIf option allows for testing the application and the configuration without adding the metadata to SharePoint. The extracted document properties are logged in a separate csv file for further analysis.

Deployment

BulkMetadataManager can be used via the cmd line and as a scheduled task. This allows for adding metadata to documents independent on the way there were uploaded to SharePoint (web, OneDrive for Business, mobile client, external applications, ...). The ini file provides granular control which sites/libraries need to be processed.

Coming releases

The following enhancements will be implemented in future releases:

- support for other file formats such as jpg, png, ...
- support for importing metadata from csv files

The target audience for running the application is SharePoint administrators and site collection administrators. It is not intended for use by end-users.

Demo

Contact us for a demo of the application.

Licensing

Price per tenant.

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*"Light-weight applications
with rich functionality"*
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