

BulkMetadataManager 2.0.5 Release Notes

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1. Introduction

This document describes the release notes for BulkMetadataManager 2.0.5 and provides the latest information on the SharePoint application.

2. About BulkMetadataManager

BulkMetadataManager is a Node.js application that uses REST API to interact with SharePoint. The application 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. It also allows for properly managing the document life cycle (records management).

The documents that need to be processed are selected using a CAML query. The application is optimized for performance by using parallel requests, caching, and batch requests. It also caters for SharePoint throttling (429 responses) and the application can handle large list exceeding the list view threshold. The CAML query needs to include a condition to avoid processing the same document multiple times.

The WhatIf option allows for running the application 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 application 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 Client Id and Client Secret at site or tenant level

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 Feature release (2.0.5)

1. Support for extracting Create and Modify dates from email, Office and PDF files and using the values as SharePoint creation and modification dates.

4.2 Bug release (2.0.4)

1. Fix bug affecting the metadata extraction from multiple document properties into a single common SharePoint column where one or more of the document properties are empty. For example, when both the email's From and FromAddress properties are mapped to a single SharePoint column named Sender and the From property has a value and the FromAddress is empty the resulting value for the Sender was empty.

4.3 Feature and bug fix release (2.0.3)

1. Allow trimming of X500 addresses by using the optional parameter `TruncateX500Address=true`. For example, instead of using the X500 value `/O=OEXCH082/OU=EXCHANGE ADMINISTRATIVE GROUP (FYDIBOHF23SPDLT)/CN=RECIPIENTS/CN=6C83EA5270B446858D39D8713DE2D5A1-someuser` the value `someuser` is extracted.
2. Fix bug preventing the use of sp-request module 3.0.0

4.4 Bug fix release (2.0.2)

1. Same logic as 2.0.1 with the exception that the Office and PDF metadata extraction is not supported. The 2.0.2 version can only be used for extracting properties from msg and eml emails. This allows for using existing configurations working with BulkMetadataManager 1.x. The following modules are therefore not required:
 - npm install xml2js
 - npm install adm-zip
 - npm install dom-parser

4.5 Bug fix release (2.0.1)

1. Use separate credentials for root and tenant credentials. See section 3.1.4 in the Administrator Guide.
2. Extract sent date and received date from emails accepting a meeting.
3. Fix bug affecting the use of `Sites=*` that depends on search to list all sites present in the tenant.

4.6 Feature release (2.0.0)

1. Support for using a single set of Client Id and Client Secret at tenant level.
2. Support for granular control of sites and libraries via wild cards, using specific site/library names and exclusions.

3. Support for extracting metadata from additional document formats:
 - Office files (docx, xlsx, pptx and vsdx)
 - PDF
4. Support for specifying parameters via an .ini file.

4.7 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.

4.8 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.

4.9 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”.

4.10 Bug fix release (1.0.9)

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

4.11 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.

4.12 Bug fix release (1.0.7)

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

4.13 Feature release (1.0.6)

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

4.14 Feature release (1.0.5)

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

4.15 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.

4.15 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 application 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 application with 3 download and 3 metadata threads and adjust these values (upwards or downwards) based on the findings.

2. Extracting metadata from PDF files using encryption is not supported.
3. The application works with a single content type (configured via the properties file or tenant properties). The application needs to run multiple times if multiple content types need to be used.

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