

## “Manage your SharePoint document metadata in bulk”

BulkMetadataManager extracts properties present within SharePoint documents (e.g., sent date from emails, last modified date from Office files, ...) 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 archiving regulations by using the actual create/modify dates and not the date when documents were migrated. The ability to add the contents of email attachments to the search index improves user productivity and enhance compliance with privacy and other regulations.

### How does it work?

Basically, the application runs on a separate system and:

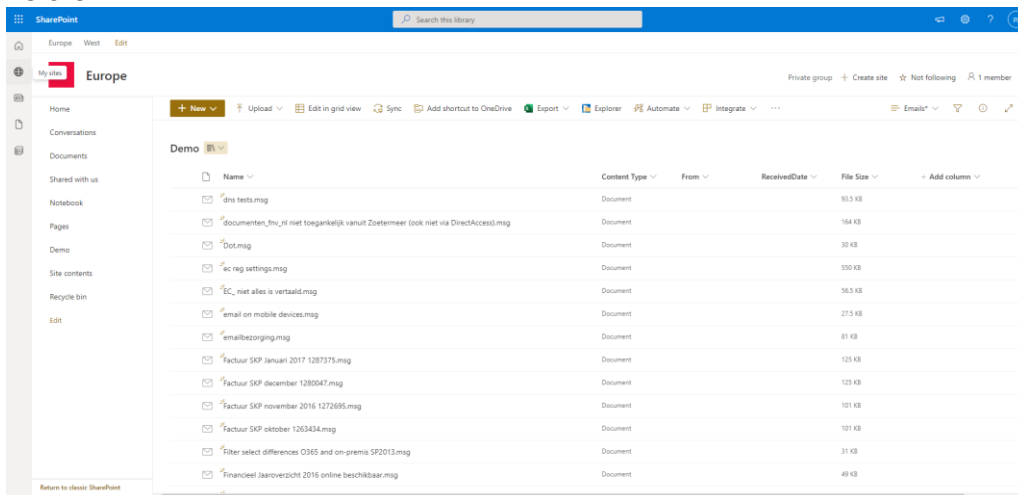
- downloads documents based on a CAML query
- extracts the document properties
- uploads the extracted metadata to SharePoint columns.

### Metadata

BulkMetadataManager support extraction of 20 properties from emails (e.g., Subject, From, Sent date, attachment names, ...). 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, ...).

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

Before:



Name	Content Type	From	ReceivedDate	File Size
ema tests.msg	Document			93.5 KB
documenten_fm_r1 niet toegankelijk vanuit Zoetermeer look niet via DirectAccess.msg	Document			164 KB
Doc.msg	Document			30 KB
ec reg settings.msg	Document			350 KB
EC_niet alles is vertaald.msg	Document			56.5 KB
email on mobile devices.msg	Document			27.5 KB
emailbezorging.msg	Document			81 KB
factuur SKP Januari 2017 1287375.msg	Document			125 KB
factuur SKP december 1280047.msg	Document			125 KB
factuur SKP november 2016 1272695.msg	Document			101 KB
factuur SKP oktober 1263434.msg	Document			101 KB
filter select differences O365 and on-premises SP2013.msg	Document			31 KB
financieel Jaaroverzicht 2016 online beschikbaar.msg	Document			49 KB

## BulkMetadataManager features

### Functionality

Extract properties from SharePoint documents (msg, eml, pdf, docx, xlsx, pptx, vsdx) 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. Make email attachments searchable.

### 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.

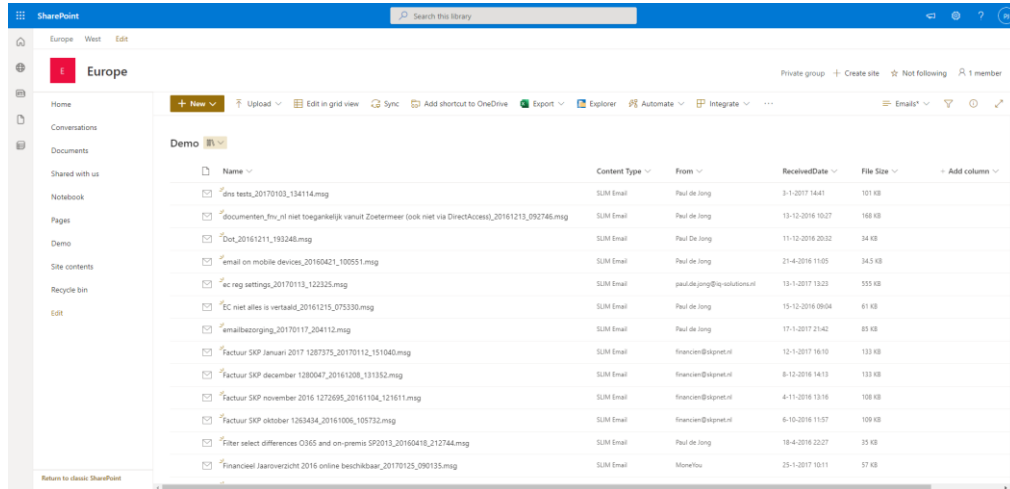
### Deployment

Install the BulkMetadataManager application on a separate computer. Configure the metadata mapping using static properties file (or using tenant properties).

### Supported environments

BulkMetadataManager supports emails (msg and eml), Office files (docx, xlsx,

## After:



Name	Content Type	From	ReceivedDate	File Size
ims test_20170103_13414.msg	SLIM Email	Paul de Jong	3-1-2017 14:41	101 KB
documenten_fru_ni niet toegankelijk vanuit Zoelmeer (ook niet via DirectAccess)_20161213_092746.msg	SLIM Email	Paul de Jong	13-12-2016 10:27	168 KB
Doc_20161211_193248.msg	SLIM Email	Paul De Jong	11-12-2016 20:32	34 KB
email on mobile devices_20160421_100551.msg	SLIM Email	Paul de Jong	21-4-2016 11:05	145 KB
ec reg settings_20170113_122325.msg	SLIM Email	paal.dejong@q-solutions.nl	13-1-2017 13:23	555 KB
EC niet alles is vertaald_20161215_075550.msg	SLIM Email	Paul de Jong	15-12-2016 09:04	61 KB
emailbezorging_20170117_204112.msg	SLIM Email	Paul de Jong	17-1-2017 21:42	83 KB
Factuur SKP Januari 2017 1287375_20170112_191040.msg	SLIM Email	francesca@qprnet.nl	12-1-2017 16:10	133 KB
Factuur SKP december 1280047_20161208_131352.msg	SLIM Email	francesca@qprnet.nl	8-12-2016 14:13	133 KB
Factuur SKP november 2016 1272695_20161104_121611.msg	SLIM Email	francesca@qprnet.nl	4-11-2016 13:16	108 KB
Factuur SKP oktober 1263434_20161006_105732.msg	SLIM Email	francesca@qprnet.nl	6-10-2016 11:57	109 KB
Filter select differences D365 and on-premises SP2013_20160418_121744.msg	SLIM Email	Paul de Jong	18-4-2016 22:27	35 KB
Financieel Jaaroverzicht 2016 online beschikbaar_20170125_090135.msg	SLIM Email	Monevbu	25-1-2017 10:11	57 KB

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

## Make email attachments searchable

Email attachments are not always included into the SharePoint Search index. This results in blind spots in the search index that affects users and compliance officers. BulkMetadataManager can extract the contents of email attachments (pdf, docx, xlsx, pptx, vsdx, xml, csv, txt and zip) and include the contents into the search index. This is a unique feature that helps organizations comply with privacy and other regulations.

## 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

pptx and vsdx) and PDF files stored in SharePoint Online.

## Demo

Contact us for a demo of the application.

## Licensing

Price per tenant.

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<https://www.slimapplications.com/>

uploaded to SharePoint (web, OneDrive for Business, mobile client, external applications, ...). The bulkMetadataManager.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, heic, mp4, mov, ...
- support for importing metadata from csv files
- support for labelling documents (retention/sensitivity)

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