

## Effortlessly Manage SharePoint Document Metadata in Bulk

**BulkMetadataManager** streamlines the process of extracting and managing metadata from SharePoint documents. It automatically retrieves embedded properties—such as the sent date from emails or the last modified date from Office files—and maps them to corresponding SharePoint columns.

This powerful tool helps organizations unlock the full potential of the SharePoint platform by enhancing productivity, improving user adoption, and enabling smarter document management. Leveraging metadata in SharePoint allows for advanced filtering, sorting, grouping, and search capabilities.

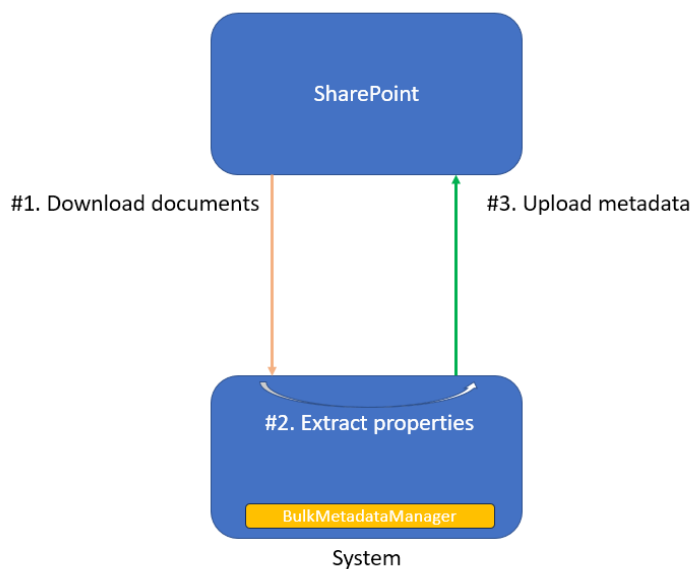
### Key Benefits:

- **Regulatory Compliance:** Ensure accurate archiving by capturing original creation and modification dates, rather than migration timestamps.
- **Enhanced Searchability:** Index the contents of email attachments to boost discoverability and support compliance with privacy and data governance standards.

### How It Works

BulkMetadataManager operates externally from SharePoint and performs the following steps:

1. **Retrieves documents** using a CAML query
2. **Extracts metadata** from document properties.
3. **Updates SharePoint** by writing the extracted values into designated columns.



## BulkMetadataManager features

### Functionality

- Select documents using **CAML queries**
- Extract metadata from:
  - Emails: .msg, .eml
  - Office files: .docx, .xlsx, .pptx, .vsdx
  - PDFs
  - Images: .jpg, .png, .dng, .heic, .heif, .tiff, .jif, .cr2
  - Videos: .mp4, .mov, .wmv
- Populate SharePoint columns with extracted values
- Optionally rename documents using metadata
- Optionally change content types
- Use **WhatIf mode** to export metadata to CSV without updating SharePoint
- Make **email attachments searchable** by indexing their contents

### Technical Capabilities

- High performance via **parallel processing** and optimization techniques
- Supports **horizontal and vertical scaling**
- Automatic handling of **SharePoint Online throttling**
- Works with **large lists** exceeding the 5,000-item threshold

## Metadata Extraction Capabilities

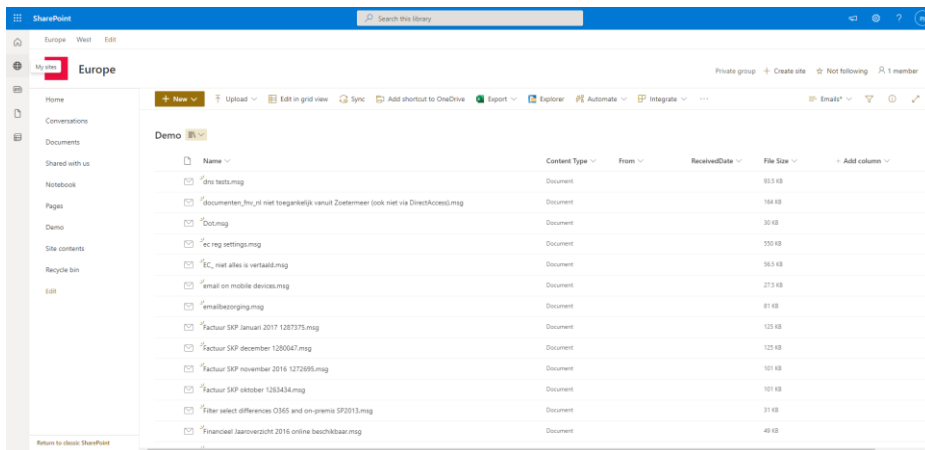
BulkMetadataManager supports comprehensive metadata extraction across a wide range of file types:

- **Emails:** Extracts up to **20 properties**, including *Subject, From, Sent Date, Attachment Names*, and more.
- **Office Documents:** Supports extraction of **29 properties**, such as *Title, Subject, Company, Last Modified*, etc.
- **PDF Files:** Retrieves **19 metadata fields**, including *Title, Keywords, Modified Date*, and others.
- **Images and Videos:** Extracts properties like *Date Taken, GPS Coordinates*, and other embedded metadata.

These capabilities allow organizations to enrich their SharePoint libraries with meaningful, searchable metadata—automatically and at scale.

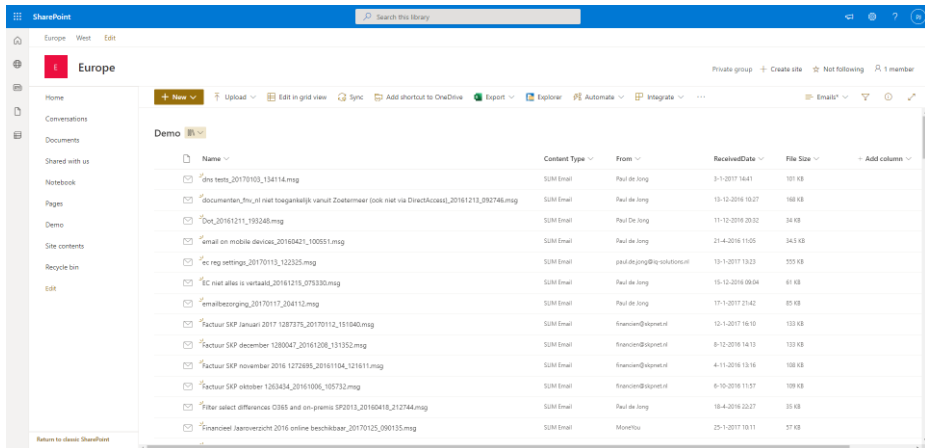
## Before and After: Email Metadata Example

The following figures illustrate the metadata of an email document **before** and **after** processing with BulkMetadataManager:



Name	Content Type	From	ReceivedDate	File Size
demo_testing.msg	Document			923 KB
documenten_fnc_nl niet toegankelijk vanuit Ziekenkamer (ook niet via DirectAccess).msg	Document			184 KB
Docum.msg	Document			30 KB
ec-reg settings.msg	Document			330 KB
EC_met alias is vertaald.msg	Document			963 KB
email on mobile devices.msg	Document			273 KB
emailbeoordeling.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 1272695.msg	Document			101 KB
Factuur SKP oktober 1263434.msg	Document			101 KB
Titler select differences C365 and on-premises SP2013.msg	Document			31 KB
Financieel Jaaroverzicht 2016 online beschikbaar.msg	Document			49 KB

## After:



Name	Content Type	From	ReceivedDate	File Size
demo_testing_20170103_134114.msg	SLIM Email	Paul de Jong	3-1-2017 14:41	101 KB
documenten_fnc_nl niet toegankelijk vanuit Ziekenkamer (ook niet via DirectAccess)_20161213_092746.msg	SLIM Email	Paul de Jong	13-12-2016 10:27	188 KB
Doc_20161211_193246.msg	SLIM Email	Paul de Jong	11-12-2016 09:02	34 KB
email on mobile devices_20160421_100551.msg	SLIM Email	Paul de Jong	21-4-2016 11:05	343 KB
ec-reg settings_20170113_122325.msg	SLIM Email	paul.dejong@spine.nl	13-1-2017 10:23	330 KB
EC_met alias is vertaald_20161219_073330.msg	SLIM Email	Paul de Jong	19-12-2016 09:04	81 KB
emailbeoordeling_20170117_204112.msg	SLIM Email	Paul de Jong	17-1-2017 21:42	85 KB
Factuur SKP januari 2017 1287375_20170112_151040.msg	SLIM Email	francesca@spine.nl	12-1-2017 16:10	103 KB
Factuur SKP december 1280047_20161208_131352.msg	SLIM Email	francesca@spine.nl	8-12-2016 14:33	103 KB
Factuur SKP november 2016 1272695_20161104_121611.msg	SLIM Email	francesca@spine.nl	4-11-2016 15:16	108 KB
Factuur SKP oktober 1263434_20161006_105732.msg	SLIM Email	francesca@spine.nl	6-10-2016 11:37	108 KB
Titler select differences C365 and on-premises SP2013_20160418_212744.msg	SLIM Email	Paul de Jong	18-4-2016 20:27	35 KB
Financieel Jaaroverzicht 2016 online beschikbaar_20170125_090135.msg	SLIM Email	Mikaela	25-1-2017 10:11	57 KB

## Deployment

- Install the executable on a separate machine
- Configure metadata mapping
- Run via **command line** or schedule as a **task**

## Supported Environments

- Compatible with **SharePoint Online**, **SharePoint Server SE** and **SharePoint 2019**
- Works with documents uploaded via web, OneDrive, mobile, or external apps

## Demo

Interested in seeing it in action? **Contact us to request a live demo of BulkMetadataManager.**

## Licensing

Licensed per tenant.

Please note that SharePoint views may only display a subset of the metadata added by **BulkMetadataManager**. In addition to enriching metadata, the application also **renames email files** and **updates their content type** to ensure consistency and better classification.

#### **Make Email Attachments Searchable**

By default, **email attachments** are not always indexed by SharePoint Search, creating blind spots that hinder both user productivity and regulatory compliance.

**BulkMetadataManager** addresses this limitation by extracting the contents of common attachment formats—including **PDF, DOCX, XLSX, PPTX, VSDX, XML, CSV, TXT, and ZIP**—and making them searchable within SharePoint.

This **unique capability** enhances the discoverability of critical information and supports compliance with **privacy, legal, and data governance regulations**

#### **Logging and Traceability**

**BulkMetadataManager** generates multiple log files to support transparency, troubleshooting, and auditing:

- **Summary Log:** Provides a high-level overview of the processing results, including the number of documents processed, success/failure counts, and key actions taken.
- **Detailed Log:** Captures granular information for each individual document, including extracted metadata, processing status, and any encountered issues.

These logs help administrators monitor operations, verify outcomes, and ensure accountability in large-scale metadata management tasks.

#### **Performance and Scalability**

**BulkMetadataManager** is engineered for high performance and efficiency, even in large-scale environments:

- **Parallel Processing:** Utilizes multiple parallel threads to download documents and apply metadata updates, significantly reducing processing time.
- **Smart File Handling:** For large video files, only a small portion (e.g., 4 MB of an 800 MB file) is downloaded to extract metadata, minimizing bandwidth usage.
- **Caching and Optimization:** Implements intelligent caching and other performance enhancements to streamline operations.

### Scalability and Resilience

Horizontal and Vertical Scaling: Supports both scaling out (adding more instances) and scaling up (increasing resources) to boost throughput while avoiding SharePoint throttling.

- **Throttling Management:** Automatically detects and handles SharePoint Online throttling. The application pauses and resumes operations based on the Retry-After period, ensuring uninterrupted processing.
- **Large List Support:** Fully compatible with SharePoint lists that exceed the 5,000-item view threshold, enabling reliable operation in enterprise-scale environments.

### Data Integrity and Preservation

BulkMetadataManager ensures that your document history remains intact during metadata updates:

- **No Version Changes:** Metadata is applied without creating a new document version.
- **Preserves Audit Fields:** The original “**Modified**” and “**Modified By**” fields in SharePoint are left unchanged, maintaining the authenticity of document timelines.

This approach guarantees that metadata enrichment does not interfere with existing audit trails or version control policies.

### WhatIf Mode: Safe Testing Without Impact

The **WhatIf** option in **BulkMetadataManager** allows you to test your configuration and validate metadata extraction—**without making any changes to SharePoint**.

- **No Metadata Written:** SharePoint columns remain untouched during the test run.
- **CSV Output for Review:** All extracted document properties are logged in a separate **CSV file**, enabling detailed analysis and verification before going live.

This feature is ideal for trial runs, audits, and configuration tuning, ensuring confidence and control before applying changes in production.

### Deployment and Automation

BulkMetadataManager can be executed via the **command line** or configured as a **scheduled task**, enabling seamless integration into automated workflows.

This flexibility allows metadata to be added to documents **regardless of how they were uploaded**—whether through the SharePoint web interface, OneDrive for Business, mobile clients, or external applications.

- The configuration is controlled via the BulkMetadataManager.ini file.
- A **CAML query** provides fine-grained control over which **sites, libraries, or documents** are processed.

### Upcoming Enhancements

Future releases of BulkMetadataManager will include:

- **Importing metadata from CSV files**
- **Document labelling** for retention and sensitivity policies

These enhancements aim to further expand the tool's capabilities and compliance support.

### Target Audience

BulkMetadataManager is designed for use by:

- **SharePoint Administrators**
- **Site Collection Administrators**

It is **not intended for end-users**, ensuring that only authorized personnel manage metadata operations at scale.



