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Simple Bulk Loader

User Manual and Guide, version 1.1
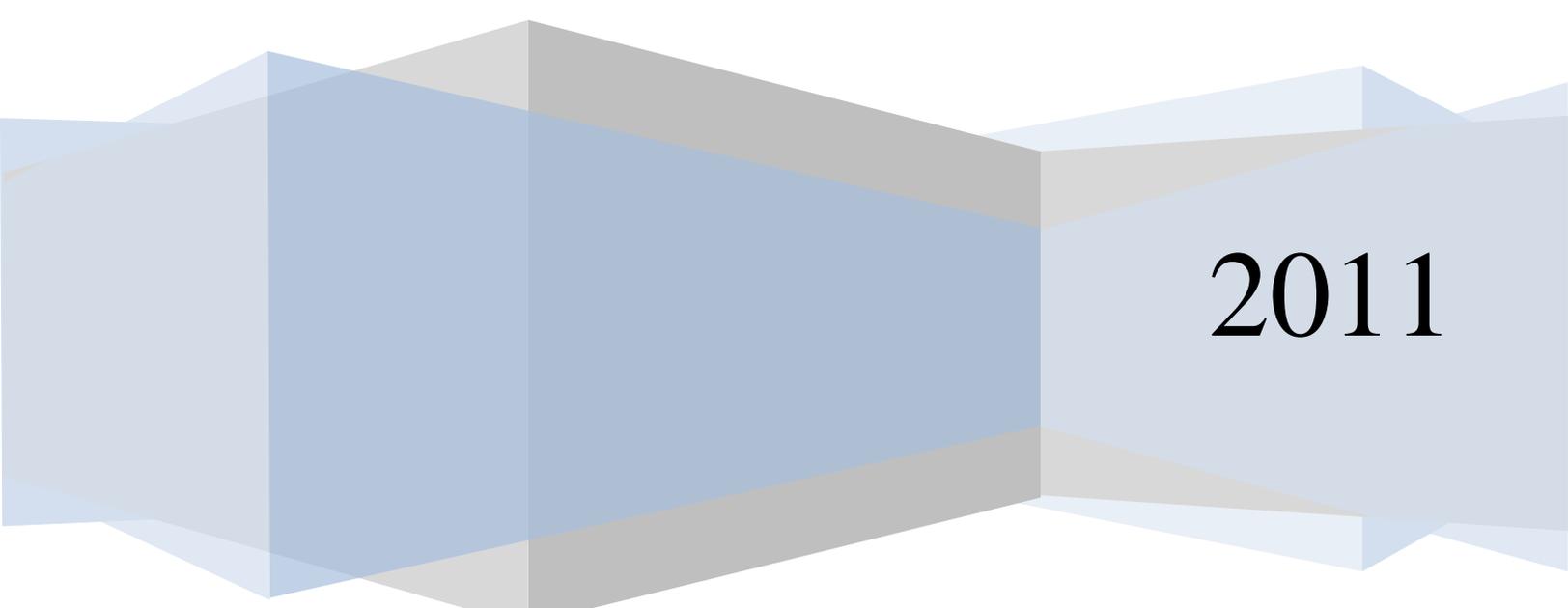
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Contents

Simple Bulk Loader Introduction

Simple Bulk Loader is a bulk document import program for FileNet P8 content management systems with optional versioning features. The user provides an excel file (workbook) that may contain multiple tabs (worksheets). The user then selects the desired worksheet and the program will validate all metadata prior to allowing the user to import the documents. Each field is validated to P8 properties including data type, length and values as applicable for choice list enabled properties. After bulk importing the user can optionally file documents into an object store folder they have 'file in' access rights to.

The program is multi-threaded, installs easily and quickly on any computer or server with .Net framework installed.

Data Validation Features

- Required property validation
- Maximum length
- Conflicting data type, ie date value in Boolean fields
- Conflicting choice list values where user has mismatched letter case or values
- Whitespace removal where cell value is empty but not null, occurs when user deletes values from cells

File Validation Features

- Path to documents is validated
- Content size must be >0 bytes
- Auto-populated document title from the file name if document title in provided spreadsheet is null value

Import Features

- Multi-threaded imports provides high speed ingestion without overwhelming P8 content engine
- Optionally version documents on a repeating key field that is user selectable per batch
- Job restart and pause feature resumes from last item loaded in batch

Ease of Use

- User guided import process with controls in place to prevent common user errors
- Robust and highly reliable, used in five countries to import data
- Save bulk import results with the P8 document ID for auditing purposes.
- Accepts display, symbolic and fuzzy logic match for P8 property to excel column naming

Installation & Configuration

Conflicting software
1. The local machine or server should not have the FileNet API dll installed in the .Net global assembly cache (GAC).

Prerequisites
1. All Microsoft based operating systems are supported.
2. .Net framework 4.0.
3. Microsoft Web services extensions 3.0 (WSE 3.0)
4. Network connectivity to P8 system.
5. Administrative rights to install the program.
6. 2.4Ghz CPU or faster (recommended).
7. 2 gigabytes of memory (minimum).

Installation Instructions
1. Download the latest installer from the web site or use your own automated installer.
2. If present, uninstall the existing version using Add/Remove programs.
3. Accept all defaults on installation or optionally choose installation directory of your choice.
4. If desktop prerequisites are missing the installer will prompt the user for installation from the vendors website.
5. The desktop Installation complete and shortcuts will be placed on the user's desktop and programs menu.
6. Enter the P8 web service interface endpoint into the application's configuration file by editing the configuration file in notepad and locate the P8WSURL setting.
   <setting name="P8WSURL" serializeAs="String">
           <value>http://yourCEHostName:port/wsi/FNCEWS40MTOM/</value>
     </setting>
7. Copy the license file provided to you into the application folder.

Bulk Document Import

Importing Data

1. Launch the application and enter your credentials. By default the User Name text box will be populated with the current users logon name obtained from the operating system, you may change this value if you desire. Enter your password then click LOGON.	
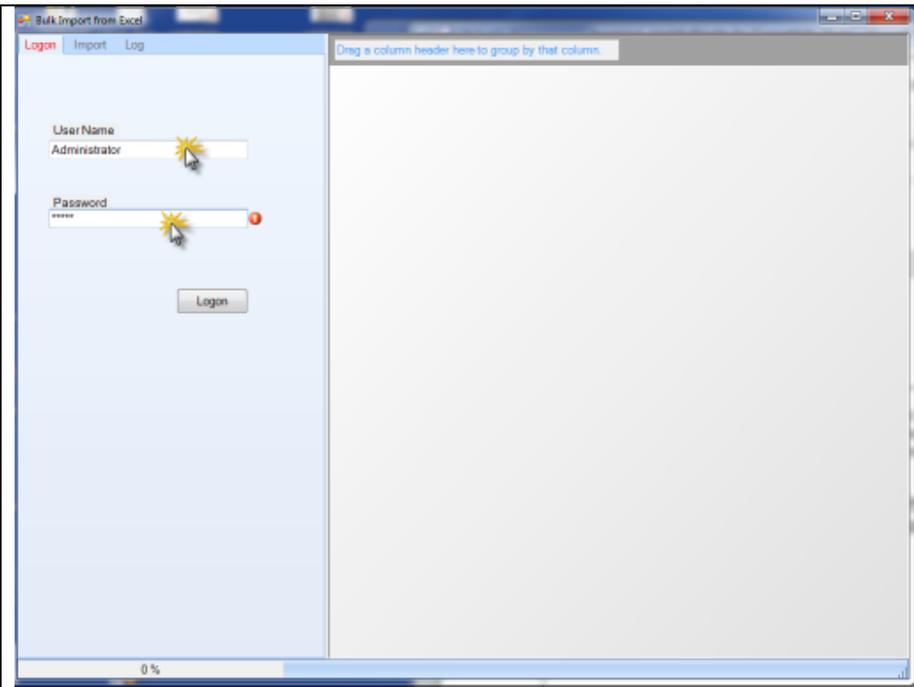
2. After the successful logon the program will automatically select the IMPORT tab for you. Click the OBJECT store drop down and then the document class drop down. The program will read the class definitions you have access to which may require a minute or two to load depending upon performance and size of your P8 system.
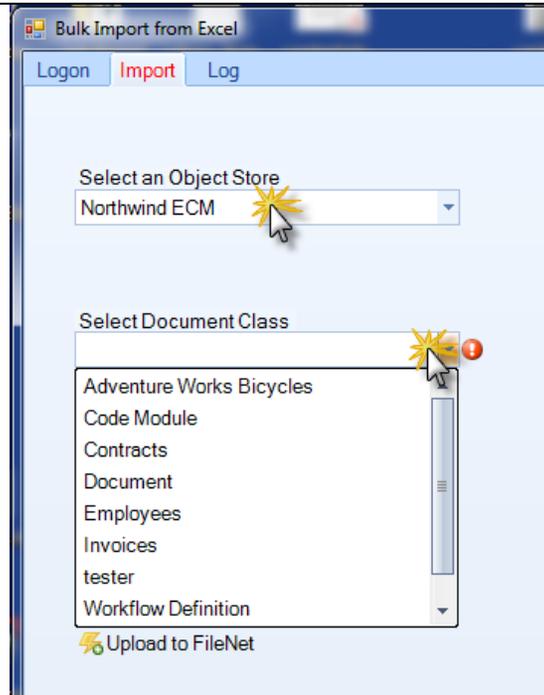
3. TIP: If you need to create a template excel file click SHOW EXAMPLE worksheet which will export a template excel file containing the columns that correspond to P8 properties (fields). 4. Click BROWSE TO EXCEL FILE to select an excel workbook.	
5. After selecting the excel file the available worksheets will appear in the drop down, select your desired worksheet from the workbook.	
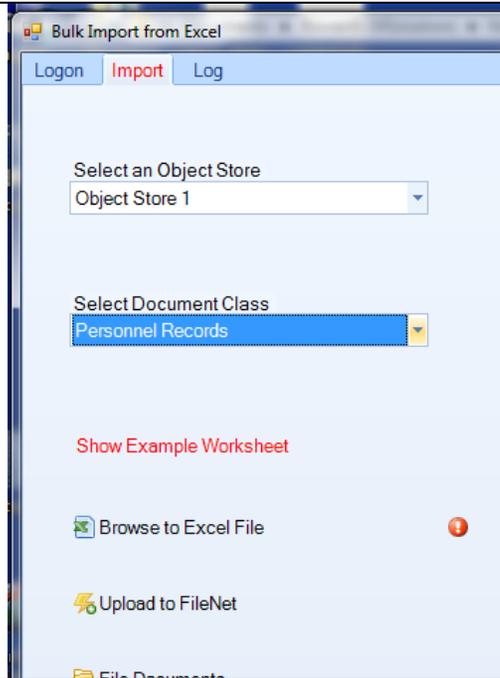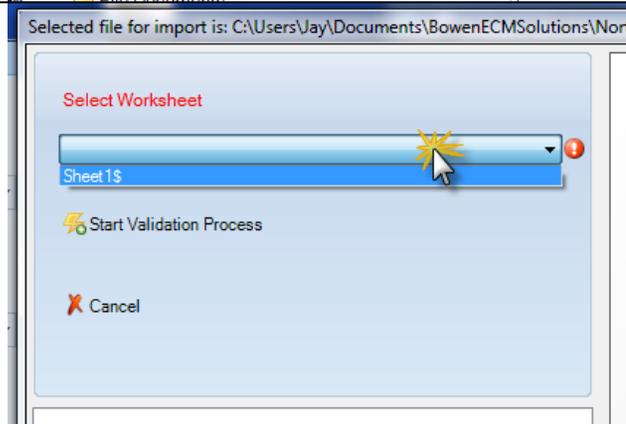
6. After selecting the worksheet the data will be imported from excel into the grid

7. Blue columns represent required data fields.

8. Click the START VALIDATION PROCESS to validate the metadata from the excel spreadsheet to FileNet P8 data fields.

9. If there are metadata or missing file errors a cell error icon will display on the respective cell, another error icon is shown on each ROW SELECTOR to quickly identify which rows have an error by scrolling vertically to locate the row then horizontally to fix the error.

10. Metadata errors can be fixed by editing the grid or by selecting the desired rows and using the keyboard DELETE key.

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11. After the data has validated the dialog returns to the import screen. Click UPLOAD to FILENET to begin the import process.	
12. OPTIONAL: To version documents within the import spreadsheet select a property that contains a repeating value. As the program imports data the current row property value is compared to previous row property value, if the values are equal the document is revised (versioned).	
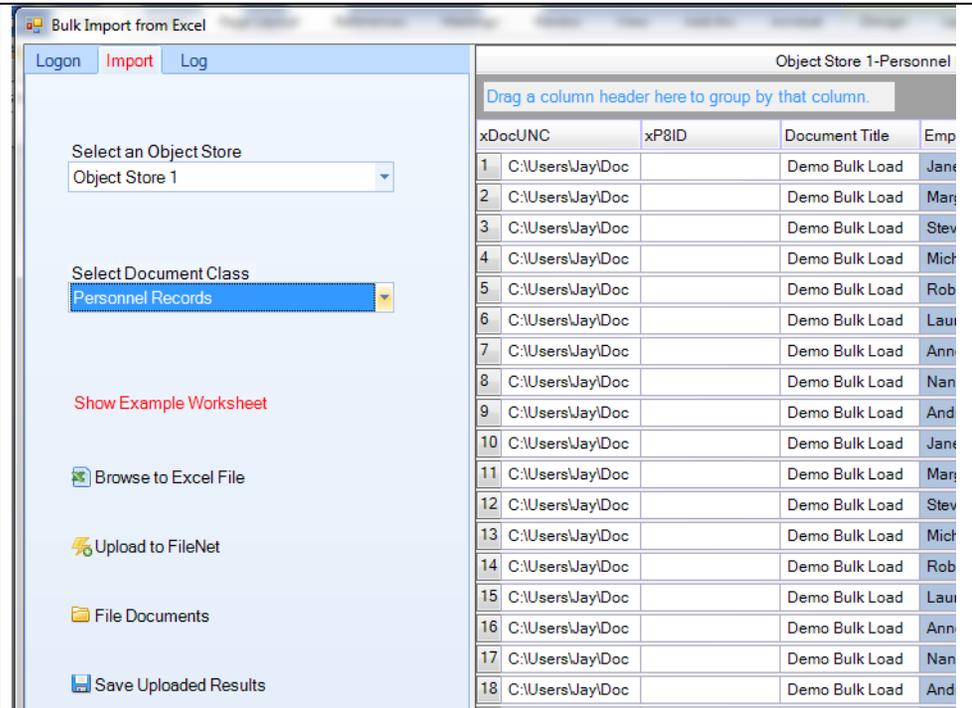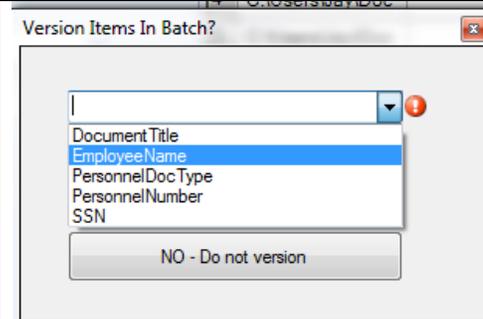
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13. The documents will now begin importing into FileNet. Speed is governed by the size of documents in megabytes, larger files will take longer to import versus smaller files. The xP8ID column will populated with P8 IDs as the import process runs along with the progress bar to show overall import progress.	

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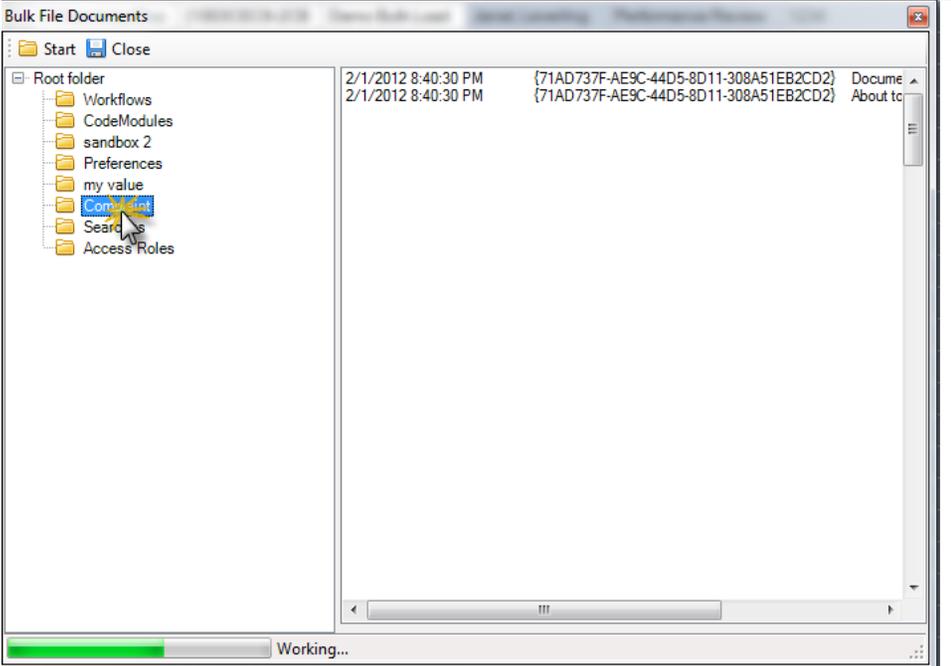
14. Following the import process, the user may optionally file into a P8 folder of their choice where they have file in access rights. 15. IBM does not recommend filing large numbers of documents into folders for performance reasons. Please use this feature only when needed.	
16. Congratulations, you have mastered bulk importing with Simple Bulk Loader!	