



V1
Document
Management

Document Automation for CloudHR

Bulk Import Add-on

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Information

Q: What is Bulk Import?

A: Where a customer has a requirement to upload several files 'in one go' against pre existing CloudHR document types, they use the Bulk Import Add-on.

All the files they wish to upload are zipped up into 1 file, let's assume 300 Contracts, so 300 PDF's, 1 PDF per contract and a zip file called LegacyContracts.zip which contains them.

They open SmartDeposit, are prompted for the Document Category and Type against which they want to upload the files.

Deposit the zip file into DbArchive.

A background file watcher is watching the table, where it finds a new ZIP file, extracts it from the archive to disk, un-compresses the zip file and archives each PDF against the associated document type automatically as well as pushing the link into CloudHR.

Pre-Requisites

Before you implement the Bulk Import Add-on, you must have already fully installed and implemented the standard solution.

It has been tested sufficiently that lookups and deposits from SmartDeposit, and deposits using MailMerge are successfully deposited with their links in CloudHR created.

DO NOT CONTINUE UNLESS THIS HAS HAPPENED.

The files within the zip file must be named ending with an underscore and the ParentKey field to which Document Category they relate.

An example:

Contract Category
Job Specification Document Type
ParentKey field is the Staff Number

ZIP file is called alljobspecs.zip

It contains 50 PDF's:

.
.
.

jobspecABC_00000072.pdf
jobspecDEF_00000102.pdf
jobspecforjenny_00000110.pdf

And so on.

The name of the zip file can be anything you like.

Assumptions

For the purposes of this document, the following assumptions are made:

- ▶ You have direct remote desktop dial in access to the V1 Server where the standard solution is installed
- ▶ The software has been installed to C:\V1Home
 - ▶ Change as appropriate to the actual customer installation path
- ▶ You have the necessary route token ID to access Vault
- ▶ CloudHR has at least one document type and one document category available to archive against

Download the V1CloudHRBulkImport Addon

Navigate to the [V1 Cloud HR Portal](#) and Click Downloads > Add-ons
Click on V1CloudHRBulkImport<VERSION>.zip

Un-compress the V1CloudHRBulkImport Addon

Un-compress the files into the C:\V1Home directory at the top level, so you end up with:

C:\V1Home\V1CloudHRBulkImport

Which contains the files therein.

Download the V1DbArchiveCleanUp Addon

Navigate to the [V1 Cloud HR Portal](#) and Click Downloads > Add-ons
Click on V1DbArchiveCleanUp<VERSION>.zip

Un-compress the V1DbArchiveCleanUp Addon

Un-compress the files into the C:\V1Home directory at the top level, so you end up with:

C:\V1Home\V1DbArchiveCleanUp

Which contains the files therein.

Import the Bulk Upload DbArchive Table

A new table has been created to house the zip files, the files therein to be uploaded, an XML file has been provided that you can simply import.

NOTE: Importing this new table can be done safely with existing tables already present and not have any adverse impact on them.

1. Open the DbLogin Admin Console and login as an administrative user
2. Click the DbArchive Table Editor (top right icon)
3. Click the icon Import from XML (second from left)
4. Where prompted, browse to the C:\V1Home\V1CloudHRBulkImport directory and select the v1dm_chrbulkupload_tables.xml
5. After a brief pause, the table should appear
6. Click the Reorder tables icon and move the table so it's in alphabetical order amongst the others already present, click OK
7. Close the DbArchive Table Editor

Copy the Bulk Import DbArchive Definition file and BLOB.mim

A single .def file handles the lookups and interface messages in SmartDeposit to necessitate archiving the initial zip file.

1. Using file explorer, browse to the C:\V1Home\V1CloudHRBulkImport directory
2. Take a copy of the BULK_IMPORT.def
3. Paste it in to the C:\V1Home\DbArchive directory

The BLOB.mim contains 20 common file types (including .zip) not present in the standard solution that can potentially be uploaded into DbArchive.

4. Using file explorer, browse to the C:\V1Home\V1CloudHRBulkImport directory
5. Take a copy of the BLOB.mim
6. Paste it in to the C:\V1Home\DbArchive directory
7. Open services.msc and restart both the DbArchive services

Install the V1CloudHRBulkImport Service

The V1CloudHRBulkImport service is watching for uploads to the Bulk Import DbArchive table.

1. Using file explorer, browse to the C:\V1Home\V1CloudHRBulkImport directory
2. Right click / run as administrator !!RUNMEFIRST
 - a. This sets all paths in all files in your current directory, so you don't have to set them manually
3. Right click / run as administrator !Install_V1CloudHRBulkImport.bat
4. Right click / run as administrator !Start_V1CloudHRBulkImport.bat
5. Open services.msc and check the service "V1 - CloudHRBulkImport" is both installed and started

The default tick frequency to check for zip files is every 5 minutes.

To change this, edit the V1CloudHRBulkImport.ini and increase / decrease this value (in seconds)

```
cmdl-wait-time=300
```

Restart the service for it to take effect.

Each tick will generate a log file, C:\V1Home\logs\V1CloudHRBulkImport.log overwritten each tick with evidence of all activity.

Install the V1DbArchiveCleanUp Service

The V1DbArchiveCleanUp service is watching for orphaned DbArchive entries (where archiving has worked but uploads to CloudHR have failed) and cleans them out *without* the need to re-index NIS.

1. Using file explorer, browse to the C:\V1Home\V1DbArchiveCleanUp directory
2. Right click / run as administrator !!RUNMEFIRST
 - a. This sets all paths in all files in your current directory, so you don't have to set them manually
3. Right click / run as administrator !Install_V1DbArchiveCleanUp.bat
4. Right click / run as administrator !Start_V1DbArchiveCleanUp.bat
5. Open services.msc and check the service "V1 - DbArchive - CleanUp" is both installed and started

The default tick frequency to check for files to cleanse is once an hour.

To change this, edit the V1DbArchiveCleanUp.ini and increase / decrease this value (in seconds)

```
cmdl-wait-time=3600
```

Restart the service for it to take effect.

Each tick will generate a log file, C:\V1Home\logs\V1DbArchiveCleanUp.log overwritten each tick with evidence of all activity.