

Kinsmen Group

Bulk Loading Procedure



— BUREAU OF —
RECLAMATION

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Document Control				
Revision	Name	Date	Reason	Changes
1	Gordon Cleary	April 12, 2023	Issued	Initial Version
2	Simon Smart	April 18, 2023	Reviewed	
3	Simon Smart	August 3, 2023	Updated	Included extra detail and MARS profiles
4	Gordon Cleary	August 23, 2023	Reviewed	
5	Simon Smart	March 20, 2024	Updated	Added reference sheet detail



Introduction

This document outlines the features of the new bulk loading approach, with instructions of how to create and progress an import package through the approval workflow and import into the system.

An import package is a set of documents or asset information and an accompanying MS Excel workbook that contains metadata about the items in the package. Import packages support external references, hybrid documents, multiple revisions of the same document, and drawing title block extraction. You import packages into eDRAWS according to a set of rules called an import profile that is created by a System Administrator. Different import profiles can be configured for different sources, destinations, or purposes for the packages.

This changes introduced in the Bulk Loading RFC are focused on allowing users to import Contractor drawings into the eDRAWS Work In Progress area, Legacy drawings to either the eDRAWS Official Records or Storage, and media into the MARS vault.

Import Guide

With the introduction of Import Packages, the process for loading data into eDRAWS has changed significantly compared to the old Document Import Tool. These changes are primarily to make the process more useable in a web-based environment but also to provide better control over data quality and make it easier to process larger batches of documents.

- eDRAWS now lets you see how documents will be imported before the import is actually performed. You do this by scanning the package. This lets you verify the import configuration before any changes are made in the destination vault.
- eDRAWS scans and imports packages in the background, which lets you continue working. You can monitor the progress of an import at any time.

The following table lists the minimum steps for importing a package, listed in the order that they should be performed. Each topic is broken down into more detail in the following sections.

Step	Action
1	Collate the documents into a folder or an archive (ZIP) file that you want to import.
2	Create an MS Excel Import Sheet using a defined template, which contains the metadata that you want to import.
3	Create a new, open package to associate the source documents, metadata, and import profile together for import.
4	Start the scanning process.
5	Review the scan results and adjust the import actions as necessary.
6	Start the package import process.
7	Close the package to indicate that it has been completed.



Collate Documents to Import

All documents that are to be imported should be copied to a single folder or added to a single zip file. This folder or zip file can either be created in a temporary staging area, or directly on the server if desired. If creating on the server then you should place the folder or zip file in a uniquely named subfolder under the Import Share location:

Production Servers: \\BOR\DO\Workspace\Import\<Import Name>

Test Server: \\IBRSACEDM001\Workspace\Import\<Import Name>

For example on the test server this could be:

\\IBRSACEDM001\Workspace\Import\LegacyDocs20230803\

Create Import Sheet

This section describes the steps to create an import sheet.

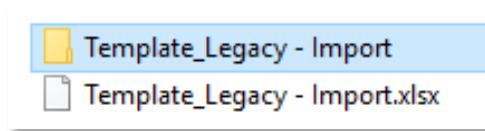
1. Create a new import sheet using the appropriate template.
 - a. **Template_Legacy.xlsx**
 - b. **Template_ContractorDrawings.xlsx**
 - c. **Template_Media.xlsx**

If you do not have access to these templates then please contact an eDRAWS administrator.

Each template is comprised of two sheets:

Sheet	Purpose
Load	Defines the documents to be imported, one row per document revision. All columns with Red headings must be populated.
References	Lists any references that should be created between documents when importing. For each reference you must enter the source and destination document number and revision, as well as the name and type of the reference. The document number should correspond to an existing row or record with matching values in the "Drawing Number" and "Revision Number" columns. The default value for the Reference Type column is "AutoCAD External Reference".

2. Fill out all necessary information (the column headers marked in red are mandatory) on the import sheet. Note that you can also fill out the additional fields if required.
3. Save the import sheet with a unique name.
4. Copy the import sheet to the same folder as the collated documents.
 - a. It is advised to save the documents in a sub-folder with the same name as the Import Sheet. E.g.

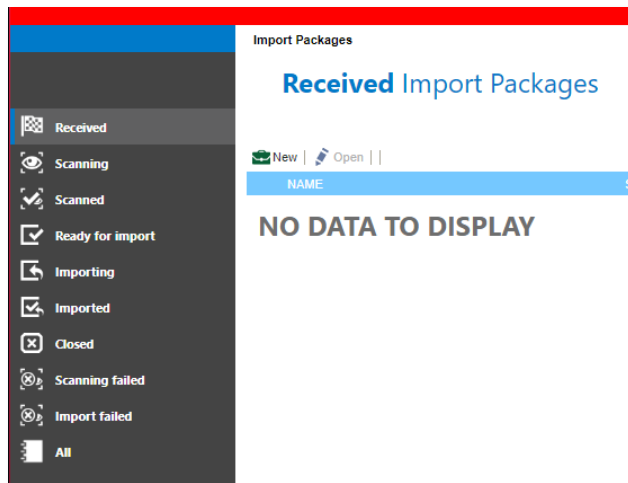


5. Copy the complete folder to the Import Share location (see previous section).

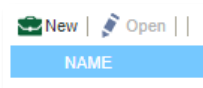


Create an Import Package

1. Open BlueCielo Meridian Enterprise Administrator or BlueCielo Explorer on the required server:
<https://ibrdenentedm201.bor.doi.net/BCEnterprise>
<https://ibrsacedm201.bor.doi.net/BCEnterprise>
2. Navigate to **Import Packages** (Right side of screen).



3. Select **New**.



4. For **Source Metadata** open the import sheet.



NEW IMPORT PACKAGE

Identification
The workbook file that contains the document metadata to import.

Source metadata (.xlsx)

Package name

Description

Import profile
The import profile specifies the destination vault and the settings for the import.

Import profile

Source files
Please specify the name of the archive (.zip) file that contains the source files for the package.

Source archive (ZIP)

☐ Use content from a folder.

☐ Process the package without document files.

HELP ? OK CANCEL

The Package name and source archive/folder name will be automatically updated to match the name of the spreadsheet.

- For the **Import Profile** drop down select the required Profile.

eDRAWS Profiles:

- Contractor
- Legacy (Official Records)
- Legacy (Storage)

MARS Profiles:

- Import Media

Each profile will have a suffix indicating the vault that the documents will be imported into, ensure you pick the correct profile for the desired destination.

Import profile
The import profile specifies the destination vault and the settings for the import.

Import profile


Contract Drawings - LCB
Legacy (Official Records) - LCB
Legacy (Storage) - LCB
Import Media - MARS

- Select **Use content from a folder** (or leave unchecked if you are using a zip file).



Source files

Please specify the name of the archive (.zip) file that contains the source files for the package.

Source folder: 

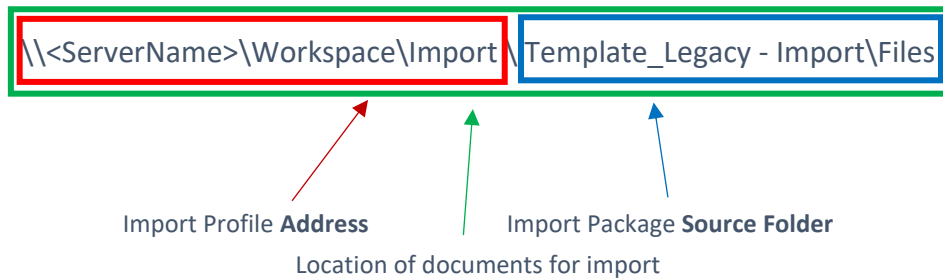
☒ Use content from a folder.

☐ Process the package without document files.

Content will be downloaded from: \\Agnosthesia\D\$\Import\Template_Legacy - Import

7. Select the green arrow to verify the path is correct. Note, If a red cross is displayed please verify the path to the content is correct and retry.

At the bottom of the section a text field will display the full path of both the pre-set import profile location and the source folder address. If files are contained in a subfolder then this needs to be reflected here. E.g. For documents saved under \\<ServerName>\Workspace\Import\Template_Legacy - **Import**\Files will need the **Source folder** set to **Template_Legacy - Import\Files**. This method also applies to ZIP files therefore documents compressed in **Load.zip** will behave the same.





NEW IMPORT PACKAGE

Identification

The workbook file that contains the document metadata to import.

Source metadata (.xlsx)

Package name

Description

Import profile

The import profile specifies the destination vault and the settings for the import.

Import profile

Destination vault

Source files

Please specify the name of the archive (.zip) file that contains the source files for the package.

Source folder

☒ Use content from a folder.

☐ Process the package without document files.

Content will be downloaded from: \\IBRSACEDM001\Workspace\Import\Template_Legacy - Import

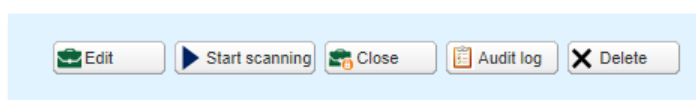
Start Scanning

Once the import package has been created you must start the scan process. This checks the import package for the following:

- Columns in the sheet match the import profile definition and vault requirements.
- Identifies items that already exist in the destination vault.
- Identifies and sorts multiple revisions of the same source item in ascending order using the Revision Sort column.
- Identifies Title blocks that match link configurations in the vault.
- Checks all references that are specified in the References table of the metadata resolve to items in the import package.
- All references in the source items resolve to other items in the import package.

To scan the import package:

1. From the new Import Package, select **Start Scanning**.

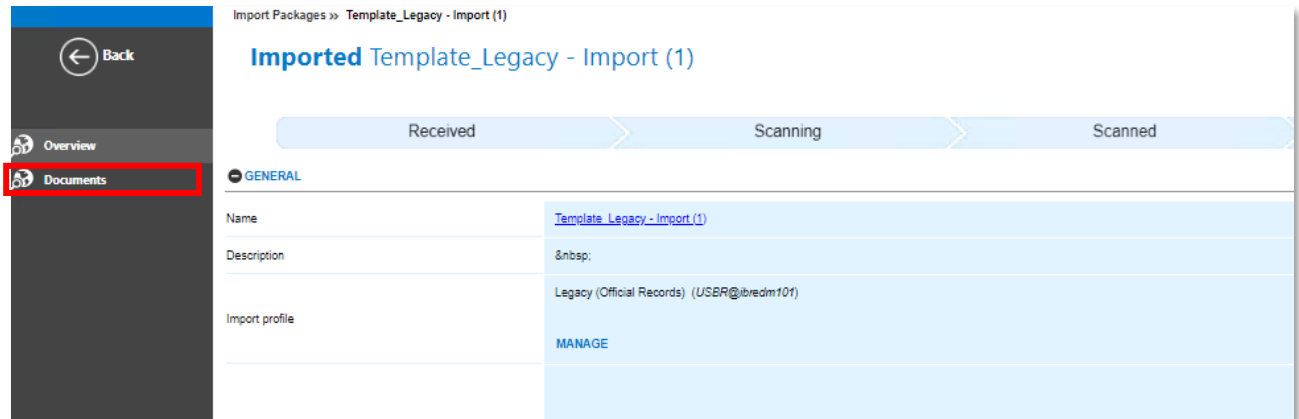




Review Results

After the scan has been completed, it is important to verify that no documents have been skipped and that the scan of the load sheet has populated properties with the correct metadata.

1. Select **Documents** from the left hand navigation.



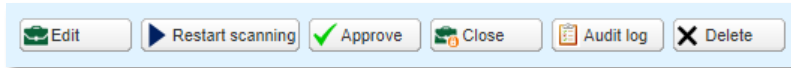
2. Verify that all drawings in the table have the correct metadata and don't have a status of skip.

ORDER	STATUS	SKIPPED REASON	DOCUMENT NUMBER	REVISION	DOCUMENT NAME	COMMENT
0	<input type="radio"/> New document	None	Test(1)	1.1	Test(1).pdf	\\Work-In-Progress\Design\X11-Stand
1	<input type="radio"/> New document	None	Test(2)	1.1	Test(2).pdf	\\Work-In-Progress\Design\X11-Stand
2	<input type="radio"/> New document	None	Test(3)	1.2	Test(3).pdf	\\Work-In-Progress\Design\X11-Stand
3	<input type="radio"/> New document	None	Test(4)	1.8	Test(4).pdf	\\Work-In-Progress\Design\X11-Stand
4	<input type="radio"/> New document	None	Test(5)	900.254	Test(5).pdf	\\Work-In-Progress\Design\X11-Stand

The status column indicates the action that will be taken for each document in the import package, this can be changed if desired by clicking on the document in the table and changing the "Take this Action" setting to one of the following values:

Action	Purpose
Update	Updates an existing document.
New Revision	Create a new revision of an existing document with the same number.
Derive	Imports a new document as a derivation of an existing document. Derived documents are linked to the existing "source" documents. Both documents remain editable.
Replace	"Replaces" a document by marking the existing document as retired and importing the new document. A reference is created between the retired and new documents.
Reference	Indicates a document from the references tab that will be imported as a reference to another document. Selecting this action for a non-reference document will have no effect.
Skip	Do not import this document

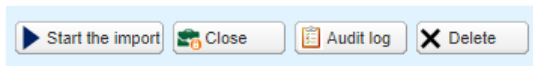
3. Once you are happy with the proposed result, return to **Overview** and select **Approve**.



Start the Import

After you have scanned an import package and approved the result, it is ready to import.

1. Select **Start the import**.



A background task is started, the status of the import package changes to **Importing**, and the icon of the import package changes to reflect its status.

When the process has completed, the status of the import package will change to either **Import** (successful) or **Failed** (failure) and a confirmation dialog box will appear. Click **OK**.

To determine why a particular item failed to import, see the text shown next to **Action taken** and **Comment** in the detail pane of the item in the import package. Also review the audit log for the package.

DETAILS	
Name	3766-208-60026-MF-1.dwg
Document number	3766-208-60026
Revision	0
File path	214-206-14879-RD-1 Edraws 031320.dwg
Rendition path	
Matching vault document	
Destination folder	
Import folder	-
Action taken	Skip (Validation failed)
Selected action	Skip
Comment	Property validation failed for: - 'SYSDOC.DocType' with value "" (The property 'Document Type (SYSDOC)' requires a value.)

2. Open **PowerWeb** and verify documents have been created in the correct location, content is not missing, and all metadata fields have the correct value.



Close the Import Package

Completed import packages may be closed to indicate that they are no longer required and may be removed from the system.

1. Locate the completed package and click **Close**. When prompted to confirm, click **Yes**.

