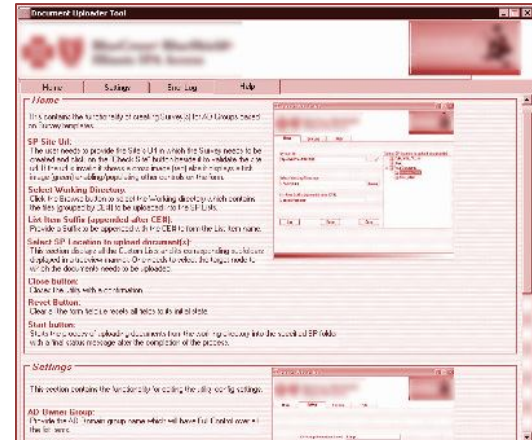# Bulk Data Uploading Tool
A SharePoint-Healthcare Case Study

Executive summary

The project involved the creation of a tool for easy document uploading to Sharepoint List from a physical working directory.

About our client

Client : Software Services and Solutions
Location : Chicago, IL, USA
Industry : Health Care

Business situation

The business requirement was to develop a tool that can be used by the customer to upload multiple documents into the SharePoint List. These documents were to be placed within different sub-directories of a root folder (working directory) and the sub-directory names were to be based on a specific identifier. On uploading these documents into Sharepoint List each document was required to get attached to the permissions as per the sub-directory name i.e. the identifier.

Solution details

The Mindfire Solution

After the analysis of the client requirements the team at Mindfire came up with a solution for building a Windows Application which would help facilitate the bulk document uploading / migration process. The interface was decided to have an option to browse for the working directory (under the physical path) and select a Sharepoint list from within a website to which the document was to get uploaded. Within a list one could also go for creating a folder to which the documents could get uploaded. A new list item was supposed to get created for each sub-directory name (present within the working directory) and all the documents present within the same sub-directory to be uploaded as an attachment against the list item. It was also decided to have some kind of error logging mechanism which would allow easy tracking of the generated errors / warnings.

Final Results

Software system

A windows application with its corresponding installer was developed and delivered to the customer. The installer helped with an easy installation of the solution on the customer's server. The application could be launched using the shortcut icon present on the desktop and it consisted of 4 different tabs (details outlined below).

Home

This tab is used for the document migration/ uploading process. From here one needs to specify a Sharepoint website url, the working directory physical path and then needs to choose a destination within Sharepoint for the document migration. The destination can be a List or any sub-folder within a List. Once the process gets started, the progress is notified using a progress bar and a status message gets displayed on completion of the process.

Settings

This tab consists of some vital information stored within the configuration file which is used during the actual document migration process. The information mainly includes the Security permission settings which get tied up with the document.
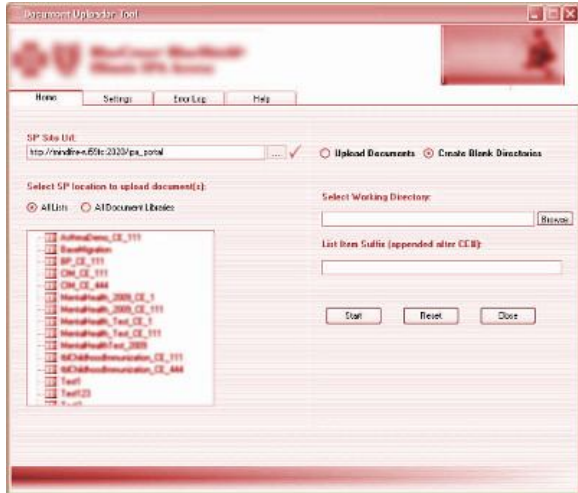
Error Log

This tab is basically meant for providing the customer with a flexibility to view the application related errors generated during the migration process. The error logs can be further filtered by Error Type and Error Date.
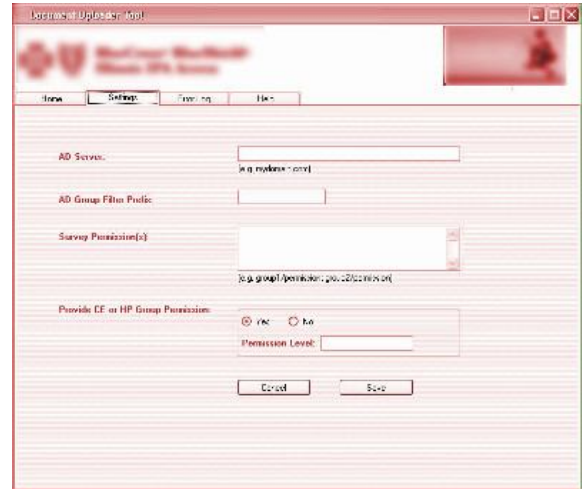
Help

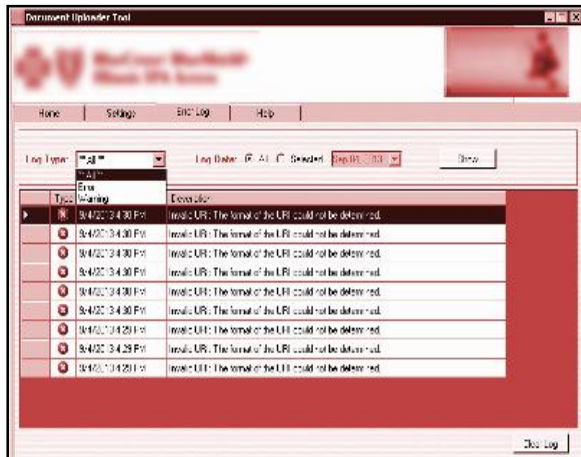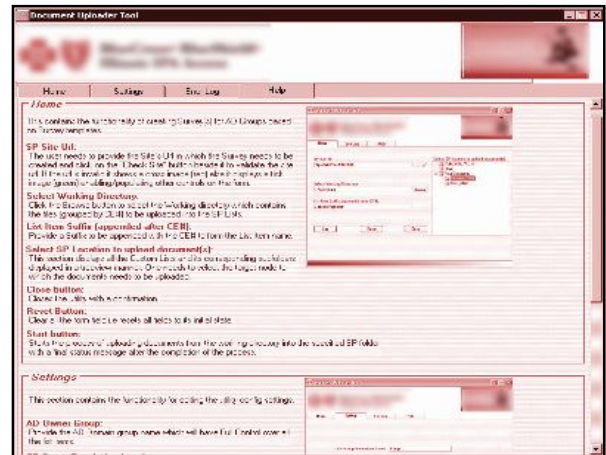This tab helps provide an overview for using the document migration tool.

Screenshots

Home Screen

Settings Screen

Error Log Screen

Help Screen

Technologies

WSS 3.0, C#.Net 3.5

Customer benefits

This automated migration tool helped the customer achieve bulk migration of files / documents in to Sharepoint List and thus avoiding the manual document upload and permission tie-up process for each.

Future relationship

Since this automated tool helped fastening the migration process, the customer was quite happy about the usage of this tool; and wanted to retain us for any future automation or integration work with Sharepoint.