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The Information Company™

User Guide

Process Suite Bulk Load Tool v1

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This utility and corresponding documentation has been created for Process Suite version 16.3. It is also valid for subsequent software versions as long as no new document version is released.

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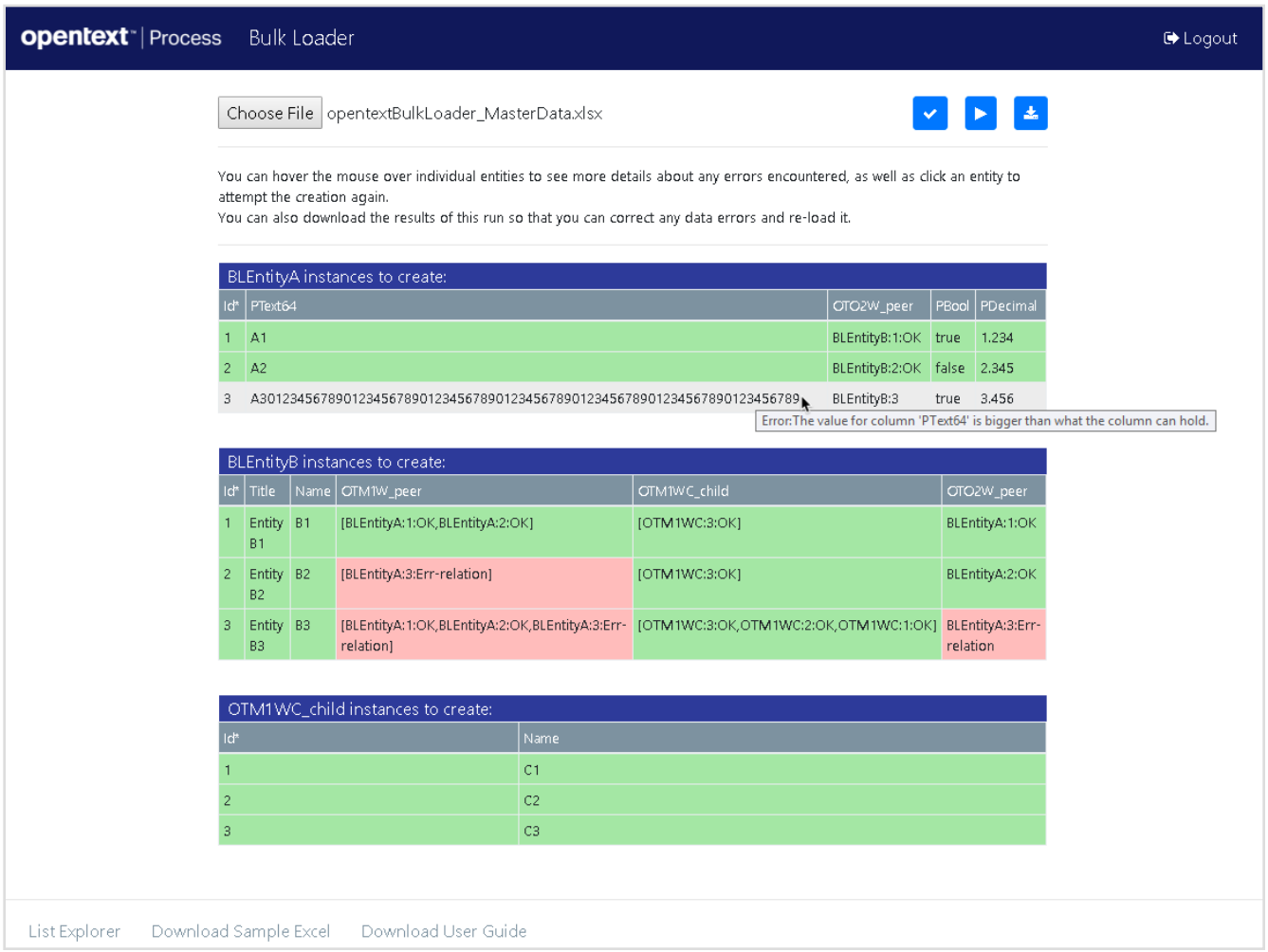
Document History

Last updated: 7th February 2018

Introduction

Overview

This document outlines the installation and configuration of the Bulk Load utility for Process Suite.



The utility allows you to load the property and relationship definitions of multiple entity instances from an Excel spreadsheet, and then create those instances using the entity Create web services. The typical use cases for this tool are the bulk loading of demonstration data, or master data.

In order for the utility to work, the Web Service building block must have been added to each entity model, and the Create web service enabled.

Installation

1. Unzip the file BulkLoader, and copy the BulkLoader folder to the webapps folder of a Tomcat instance. The folder path should be something like this:

   `C:\Program Files\Apache Software Foundation\Tomcat 8.0_AWG\webapps\BulkLoader`

2. Restart the application server where the application is deployed and check that you can access the page `login.html`. You will not be able to login use the tool (and may see errors) until you have made the changes to the configuration file outlined later in this guide.

Configuration

The main configuration file is called `config.js` in the folder `BulkLoader/config`. This configuration file uses a JSON format to define the basic aspects of the application such as the title of the portal, as well the services that can be accessed through the portal.

Once you have updated these files with your environment information, restart the application server and test that you can log in to Process Suite via the bulk load utility from the page `login.html`.

System Settings

The first section of the file has the general system settings:

```
// System level settings
system = {
      base_url: 'http://nkproc16.otdemo.net',
      ps_org: 'system',
      ps_instance: 'defaultInst',
      ps_domain: 'otdemo.net'
}
```

`base_url` is the URL used to access both Process Suite. It should contain a port number if you are using a port number to access Process Suite.

`ps_org`, `ps_instance` and `ps_domain` are the Process Suite values where the entities exist.

Application Settings

The next section of this file has the main application settings:

```
// Application wide settings
application = {
      title: 'Bulk Loader',
      desc_long: 'This tool allows you to pre-create entities by uploading Excel
      files with the entity data.  A sample Excel file can be downloaded from
      the link at the bottom of the page.'
};
```

The values for `title` and `desc_long` appear on the home screen, tab title and navigation bar in the UI.

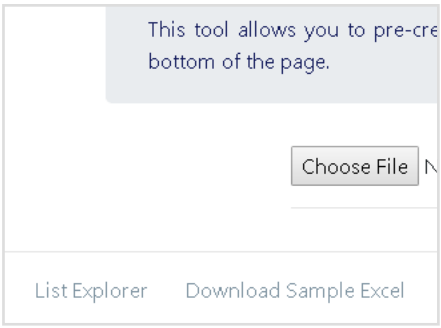
Loading Entity Instances

The steps required to use the tool are as follows:

1. Log in
2. Download and populate template spreadsheet
3. Choose file to load it
4. Validate the spreadsheet and any relationship references
5. Correct the data inline or update the spreadsheet and start again
6. Run the creation of entity instances
7. Review the results
8. Correct the data, either inline or download the spreadsheet to correct offline
9. Repeat until all entities are created

Download Excel Template

Once you have logged in to the application you can download a sample Excel file by clicking the link at the bottom of the page.



The first sheet of the spreadsheet has some notes about how to complete the file, and there are some sample entity instance sheets for reference, although you should replace these with your own information.

Populate Spreadsheet

The name of the file is important. It should be in the format `<projectName>_<description>.xslx`, where `<projectName>` is the name of the project in Explorer (cws). You can find this from the Entity Web Service Building Block configuration. The `<description>` section can be anything, but should not contain spaces or underscores.

Create a sheet for each entity. The name of the sheet must match the entity name (not the display name). The only exception is that a child entity should have the sheet name of `<entityName>_child` to make it clear that it is a child entity.

On each sheet you then add a column for each property that you want to populate in the entity instances. External entities (coming from a database) typically have their own unique ID as well as the Process Suite Id. This column must be included, and have the suffix `_extid` added. To populate the Title building block of an entity you simply need to add a column called `Title`.

Relationships are described with an additional column in the sheet. The column name for a relationship must have the name of the relationship with either `_peer` or `_child` appended to it. The reference to another entity is defined using the notation `<entityName:Id*>` where `Id*` is the `Id*` value in the sheet. One to many relationships are separated by a comma and enclosed in square brackets, such as `[entityName:1,entityName:3]`.

All cells should be formatted as 'Text', including dates. Dates are defined with the format `Year-Month-Day` e.g. `2017-11-23`.

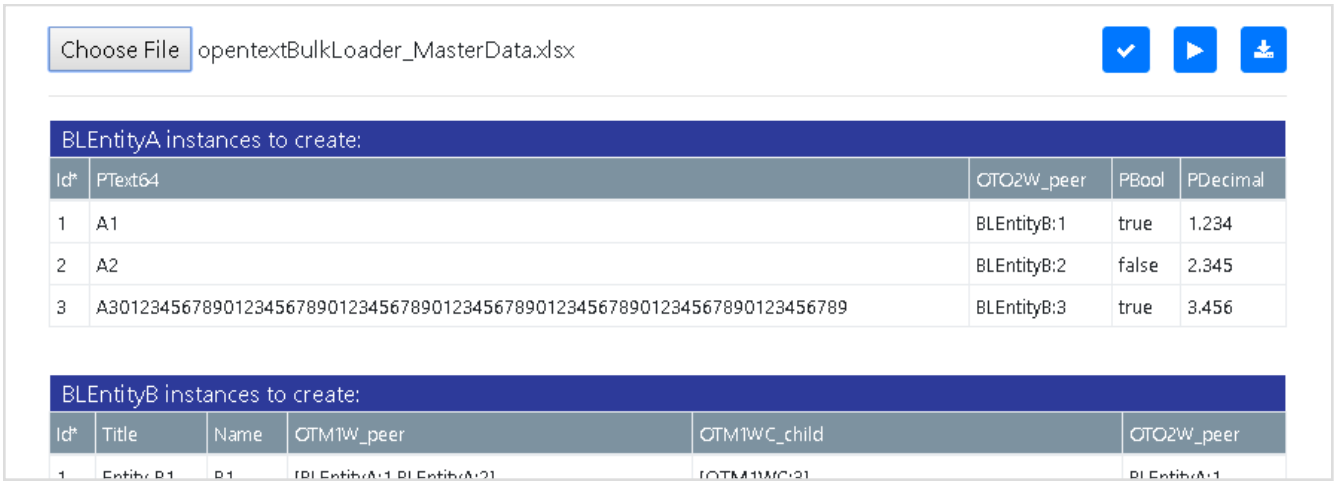
In addition you must add some columns that the tool requires. The first column must be called 'Id*' and the last column must be called 'Result*'. These are distinguished from the other columns, which represent the properties of the entity, by the asterisk. The 'Id*' column is the internal ID of the entity, used when defining relationships between entities and the 'Result*' column is updated with the outcome of the tool when the results of the load operation are exported - either storing the ItemId value of the created entity, or the error message if it could not be created.

It is worth noting that peer and child relationships to entities are treated a little differently. Peer entities are created once, but can be related to multiple entities. Child entities on the other hand are created specifically as a child of the parent. If the same child entity from the spreadsheet s related to more than one parent entity then a separate instance of that entity will be created for each parent.

Load Spreadsheet

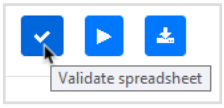
To load a spreadsheet, and review the information on screen, simply click the **Choose File** button.

Once you have a valid file loaded, the entity instance data will display, and you should have additional buttons to validate and run the tool.



Validate Spreadsheet

To check the spreadsheet for any obvious errors, click the **Validate** button.



If there are invalid relationship references (invalid relation name or index value), they will be highlighted in red with an explanation. In the example below, there is no instance of entity BLEntityB with an Id* value of 4.

BLEntityA instances to create:

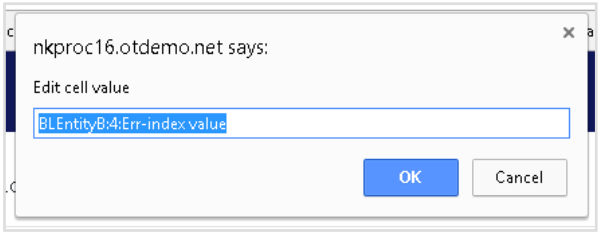
Id*	PText64	OTO2W_peer	P
1	A1	BLEntityB:1	tr
2	A2	BLEntityB:2	fa
3	A3012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789	BLEntityB:4:Err-index value	tr

BLEntityB instances to create:

Id*	Title	Name	OTM1W_peer	OTM1WC_child	OTO
1	Entity B1	B1	BLEntityA:2	[OTM1WC:3:OK]	BLEr
2	Entity B2	B2	BLEntityA:3	[OTM1WC:3:OK]	BLEr
3	Entity B3	B3	BLEntityA:3	[OTM1WC:3:OK,OTM1WC:2:OK,OTM1WC:1:OK]	BLEr

Correct Data Inline

In the example above, it is an obvious error. To correct the reference inline, simply click the highlighted cell to open up an editor.

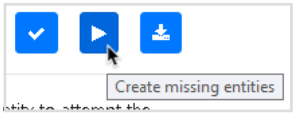


Click **OK** to save the change, or **Cancel** to close the editor without making any changes.

Once you have corrected the mistakes, you can validate the spreadsheet again.

Create Entity Instances

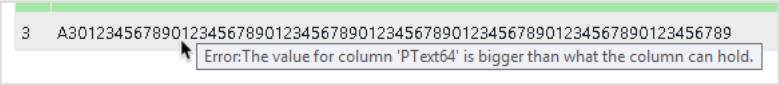
When you are happy with the data, click the Run button. You can run the tool against the same file as many times as you need to. If an entity has already been created, it will not be created again.



As the tool executes, any entity instances that cannot be created are highlighted in red, and any relationships that cannot be created have an explanation added to their reference.

2	A2
3	A3012345678901234567890123456789012345678901234567890123456789012345678901234567890123456789

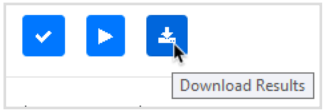
If you hover the mouse over these rows, details of the error are shown in a popup tooltip.



An error such as this one can be corrected inline and the process run again.

Download Results

Once the entities have been created, you are able to download the results as another spreadsheet, by clicking the **Download** button.



This creates and downloads a file with the same name as the original but with `results_` prepended to the name. This file contains the completed results columns as shown here.

	A	B	C	D	E	F
1	Id*	PText64	OTO2W_peer	PBool	PDecimal	Result*
2	1	A1	BLEntityB:1:OK	true	1.234	Created:000C29B1EAB5A1E7B75D530CBE3F94C4.327811105
3	2	A2	BLEntityB:2:OK	false	2.345	Created:000C29B1EAB5A1E7B75D530CBE3F94C4.327811103
4	3	A3012345678901234	BLEntityB:3	true	3.456	Error:The value for column 'PText64' is bigger than what the column can hold.

If there are many errors, you can correct the data in this file offline, and then re-load this file for subsequent processing. So long as you leave the result for created items in the Result* column, these entities will not be created again.

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