

## Work Sample: Process documentation

This sample shows the process documentation for a fictitious ProductX. Assume that this product allows its users to create and manage:

- Entities
- Sample data for the entities
- Data sets combining the sample data of various entities
- Simulations run with entities and data sets in ProductX

For the sake of brevity, this sample describes only the concept of the sample data and the following processes used to manage the sample data:

- Viewing the sample data
- Creating the sample data
- Importing the sample data

This sample also includes brief references to the related topics about Entity Templates and Troubleshooting Import Failure.

# Managing Sample Data

The sample data for an entity is one or more records containing values for the entity's attributes. You must create sample data for every entity that you want to include in a simulation to run in ProductX.

Sample data for various entities can be combined into a data set to be used in a simulation.

For more information, see:

- Managing Entities
- [Viewing Sample Data](#)
- [Creating Sample Data](#)
- [Importing Sample Data](#)
- Exporting Sample Data
- Sample Data Examples
- Managing Data Sets
- Managing Simulations

## Viewing Sample Data

To view the sample data for an entity, perform the following steps:

1. From the ProductX sidebar menu, select **Data Model > Entities**.

The Entities workspace is displayed. Its left pane displays a list of entities. A search field is also available to filter the list by entity name or description.

The workspace's right pane displays the details and attributes of one of the entities selected from the list.

The screenshot shows the 'Entities' workspace in ProductX. On the left, a sidebar lists entities: Service Request Type, Service Request Severity, Service Request Priority (selected), Interaction Channel, and Customer Service Activity State. The main area displays details for 'Service Request Priority'. It includes a search field, a description, and a table of attributes.

Service Request Priority

Reference

Creation Date: 10/14/2019

Service Request Priority entity maintains the valid values to represent the priority of a service request. Below are few examples of service request priorities: No Rush, Low, Medium, High, Urgent

Extended Information

Attribute Name	Data Type	Description	Primary Key	Foreign Keys	Physical Implementa...
Service Request Pri...	STRING	An unique identifier...	✓		DATA_CHANNEL
Service Request Pri...	STRING	Description of the s...			DATA_CHANNEL
Service Request Pri...	STRING	Internal object id of ...			DATA_CHANNEL
Service Request Pri...	STRING	An identifier to repre...			DATA_CHANNEL

2. Optionally, enter a search string in the search field and click

Else, skip to step 3.

3. Select the desired entity from the list.

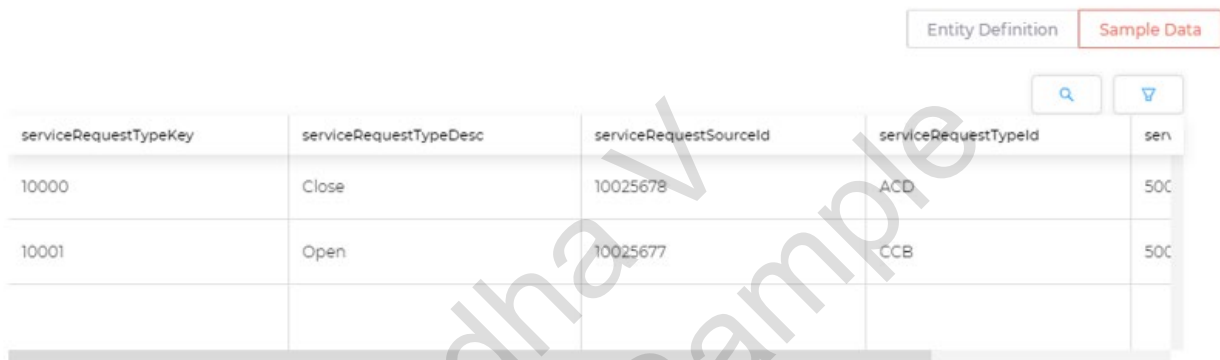
The entity's description, type, creation date, and attributes are displayed in the right pane.

4. In the right pane, select the **Sample Data** tab.

The sample data for the selected entity is displayed in tabular format.

The 🔍 option is available to search for sample data records matching a search string.

The ▾ option is available to filter the displayed sample data records by specified filter criteria.



serviceRequestTypeKey	serviceRequestTypeDesc	serviceRequestSourceId	serviceRequestTypeId	sen
10000	Close	10025678	ACD	500
10001	Open	10025677	CCB	500

5. Optionally, click 🔍 and specify the desired search string in the displayed search field.

Else, skip to step 6.

6. Optionally, click ▾ and specify the desired filter criteria in the filter field that appears.

## Creating Sample Data

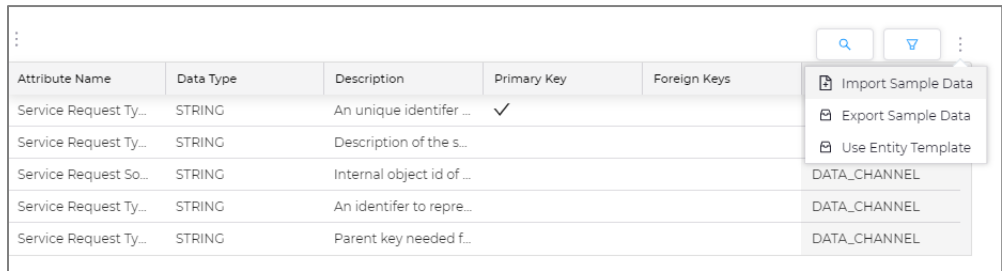
You can create sample data for an entity by downloading the template for that entity and populating the template with appropriate sample data. Then you must import this template containing the sample data into ProductX.

An entity template is a CSV file containing the given entity's schema (the entity's attributes, attribute data types, and attribute properties).

To create sample data for an entity, perform the following steps:

1. For the desired entity, perform the steps 1 to 3 of [Viewing Sample Data](#).
2. In the right pane of the Entities workspace, select the **Entity Definition** tab.

3. Click  and select **Use Entity Template** from the displayed menu.



Attribute Name	Data Type	Description	Primary Key	Foreign Keys
Service Request Ty...	STRING	An unique identifier ...	✓	
Service Request Ty...	STRING	Description of the s...		
Service Request So...	STRING	Internal object id of ...		
Service Request Ty...	STRING	An identifier to repre...		
Service Request Ty...	STRING	Parent key needed f...		

The entity template, named *<entity name>.csv*, is downloaded to the default download folder on your local drive.

4. Open the downloaded file and add new rows with values for entity attributes.

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**CAUTION:** Ensure that:

- Each specified value must be of the corresponding attribute data type displayed in the Entity Definition tab.
  - The updated file's size must not exceed 1 MB.
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5. Save the updated file.
6. Import the updated file as described in [Importing Sample Data](#).

## Importing Sample Data

You can import the sample data for an entity from a CSV file.


- The CSV file size must not exceed 5 MB.
- The CSV file must be one of the following:
  - An entity template that you downloaded and populated with data, as described in [Creating Sample Data](#).
  - A CSV file generated by an external system, containing the following:
    - An entity schema matching that of the given entity
    - Sample data confirming to the data types of the given entity's attributes

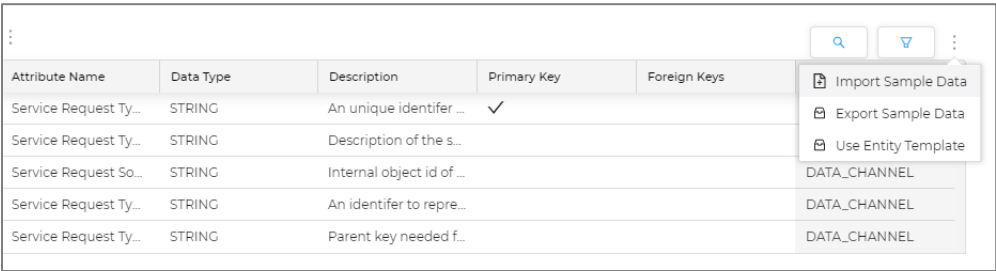
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**CAUTION:** Attempt to import sample data from a CSV file not meeting these conditions results in the failure of import. For more information, see [Troubleshooting Sample Data Import Failure](#).

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To import sample data for an entity from a CSV file, perform the following steps:

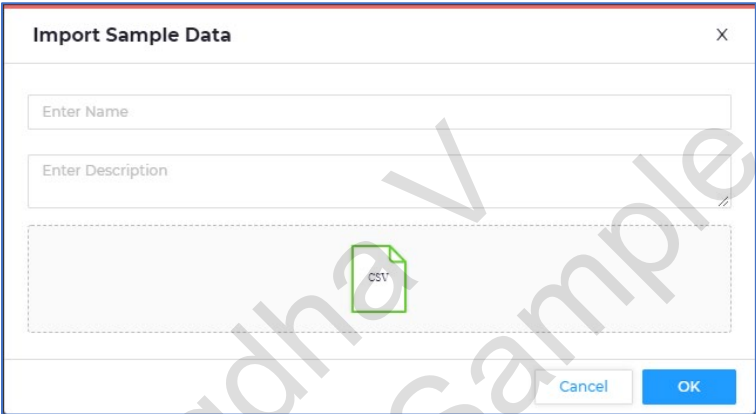
1. For the desired entity, perform the steps 1 to 3 of [Viewing Sample Data](#).
2. Click  and select **Import Sample Data** from the displayed menu.



The screenshot shows a table with five columns: Attribute Name, Data Type, Description, Primary Key, and Foreign Keys. The table contains six rows of data. A dropdown menu is open from the 'More options' icon (three dots) in the top right corner of the table. The menu includes the following options: Import Sample Data (highlighted), Export Sample Data, Use Entity Template, and three instances of DATA\_CHANNEL.

Attribute Name	Data Type	Description	Primary Key	Foreign Keys
Service Request Ty...	STRING	An unique identifier ...	✓	
Service Request Ty...	STRING	Description of the s...		
Service Request So...	STRING	Internal object id of ...		
Service Request Ty...	STRING	An identifier to repre...		
Service Request Ty...	STRING	Parent key needed f...		

The Import Sample Data pop-up window is displayed.



The screenshot shows the 'Import Sample Data' pop-up window. It has a title bar with 'Import Sample Data' and a close button (X). The window contains three input fields: 'Enter Name', 'Enter Description', and a large dashed box for a file upload. A green icon with 'CSV' is shown in the file upload area. At the bottom right, there are 'Cancel' and 'OK' buttons.

3. Optionally, in the **Enter Name** field, enter the name of the sample data.

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**TIP:** In this name, you can include the name of the given entity and its creation date.

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Else, skip to step 4.

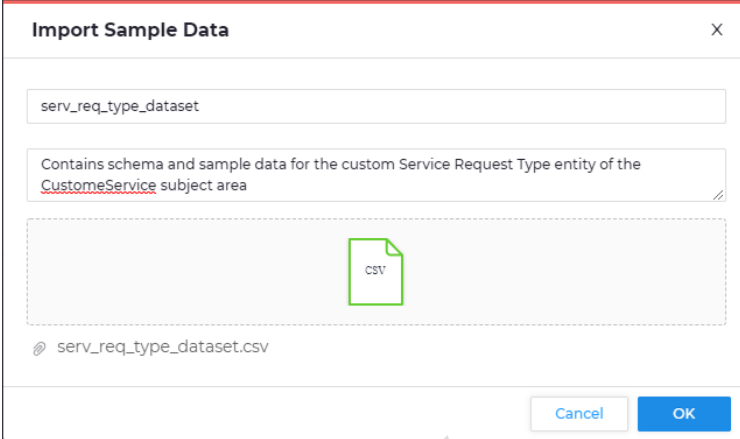
4. Optionally, in the **Enter Description** field, enter a description of the sample data.

5. Click .

The Open dialog box is displayed.

6. Navigate to the location of the CSV file on your local drive, select the file, and click **Open**.

Name of the CSV file to import appears on the pop-up window. If the **Enter Name** field was empty, it is now populated with the CSV file name.



7. Click **OK**.

The sample data import begins.

- If the import fails, a failure notification is displayed indicating the reason of failure. For more information, see [Troubleshooting Sample Data Import Failure](#).
- If the import is successful, the Entities workspace is displayed with the Sample Data tab now containing the imported data. For more information, see [Viewing Sample Data](#).

## Troubleshooting Sample Data Import Failure

The sample data import fails if you attempt to import the sample data for an entity from a CSV file that has one or more of the following issues, indicated by the failure notification:

- File size exceeds 5 MB.  
Distribute the sample data records between multiple CSV files having maximum size of 5MB.
- File contains an entity schema that does not match the schema of the entity the sample data is imported for.

Verify that the entity schema in the CSV file matches the given entity schema.

The CSV file's entity schema must have the same entity attribute names, attribute data types, and attribute properties as those of the given entity.

However, the order of the entity attributes in the CSV file's entity schema can be different from that in the given entity.

- File contains sample data records, which have values of data types different from the data types of the given entity's attributes.

Verify that each record has values of correct data types for all attributes.

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Work Sample