View Builder CSV Import

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Overview

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Load CSV

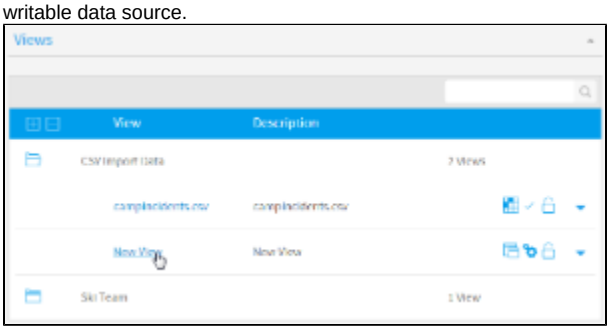
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Before importing a CSV file you will need to ensure the functionality is enabled and your CSV file is ready.

> *See CSV Data Imports for more information.*

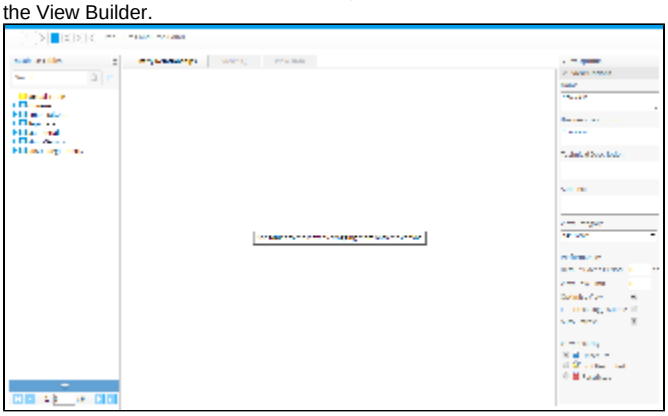
Create

To import a CSV file through the View Builder you will first need to open the builder:

1. Navigate to **Administration** > **Admin Console**, expand the **Views** section and click on the view you wish to import the CSV in.
Note: the selected view must be based on a writable data source.



2. Edit the view and access the first step of the View Builder.



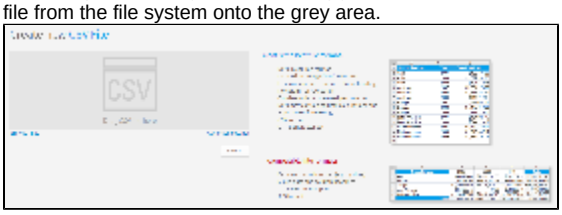
3. Click on the **Add CSV Table** button at the bottom of the Database Tables list on the left.



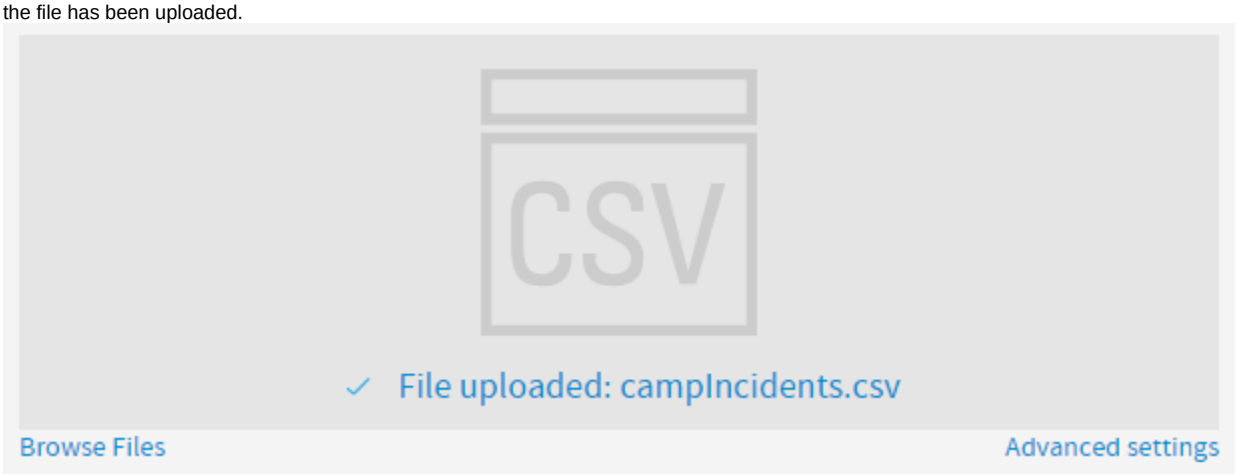
Load

From here you will be taken to the CSV File step where you will need to locate and load the CSV file.

1. Either click on the **Browse Files** link, or the CSV image to locate your file, or drag your file from the file system onto the grey area.

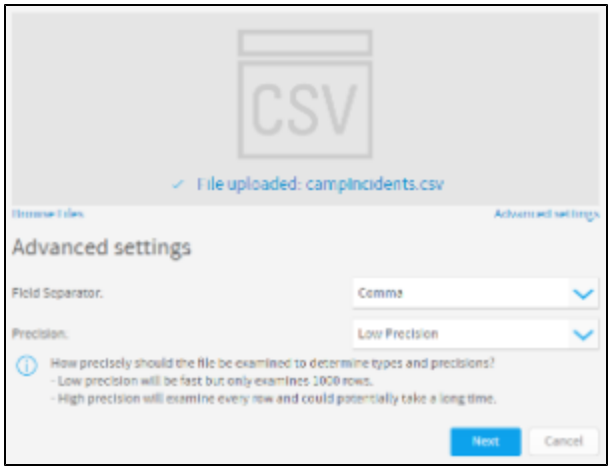


2. Once selected, Yellowfin will confirm that the file has been uploaded.



3. From here, if you have Advanced CSV Settings permissions, you can click on the **Advanced Settings** link, otherwise progress to step 4.
Advanced Settings include:

- **Field Separator** - this allows you to specify which character is used in the CSV to separate values in the case that it's not a comma. If **Other** is selected, you can type your own character.
- **Precision** - this allows you to define how many rows of the CSV Yellowfin will examine in order to define the field types and size.
    - **Low Precision** is fast, and only examines the first 1000 rows of the file.
    - **High Precision** is slower, depending on the size of the file, as it examines all rows.

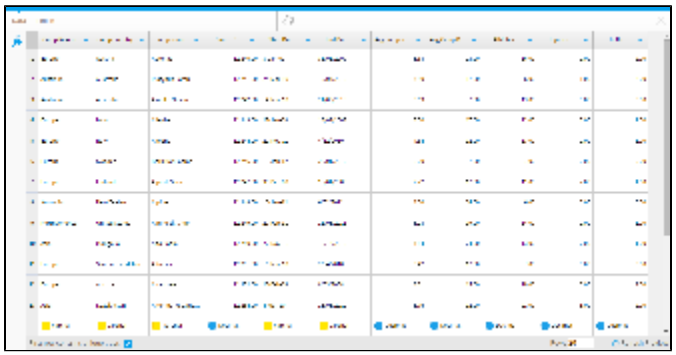


4. Once complete, click the **Next** button to progress to the preview step.

Configure Data

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Once you've selected your file, and defined any settings required, you will be taken to the CSV Data step of the process. This is where you will be able to define several things, including Column Titles, CSV Table Settings, and Converted Fields.



Data Step Options

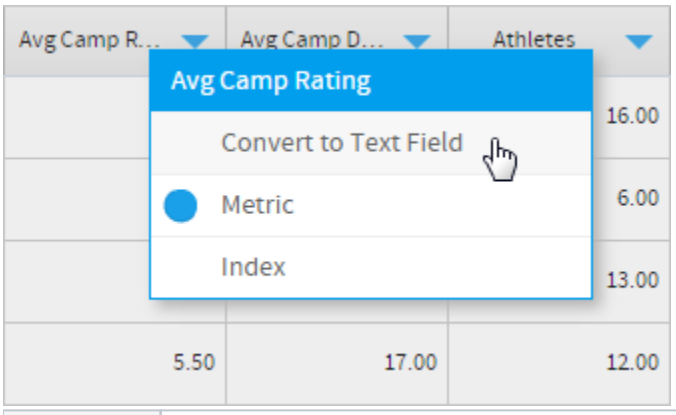
These options are available outside of the Data Step menus.

Column Titles	By default, Yellowfin assumes that the first row of your CSV contains the text to be used as column titles, rather than data itself. To change this option you can uncheck the **First row contains unique titles** option at the bottom-left of the page. This will take the first row of the CSV and treat it as data, allowing you to provide your own labels. First row contains unique titles ☑ If you wish to change some or all of the column titles displayed, you can click on the title, which will select it and allow you to enter new text Camp Region ▼ | Camp Country ▼ | Camp Name ▼ Europe | Austria | Abtenau Australia | Australia | Platypus Camp
Rows	This allows you to change the number of rows previewed. Rows 20

Refresh	This allows you to refresh the data displayed in the preview. Refresh Preview

Field Drop Down Menu

This menu is accessed by clicking on the blue arrow on a Column Title.



Convert to Text Field	This allows the contents of the field to be treated as text, changing the functionality that's available to it from numeric or date to text. This option is only displayed on fields not recognised as text natively.
Field Type	This tells you if Yellowfin recognises the field as a Metric or Dimension. This can be changed through formatting the field in the View Fields step of the builder.
Index	This allows you to add an index to the field in order to increase read performance. Generally, indexes should be added to fields that will be used in joins or filters.

Settings

This menu allows to define meta data and other options relating to the View that Yellowfin will create from the CSV file at the end of the import process.

Name	This will be the name of the CSV Table that Yellowfin will create at the end of the import process. This is how view creators will identify it in the list of database tables in the first step of the view builder.
Description	This will be the description of the CSV Table that Yellowfin will create at the end of the import process. This should contain information about what's contained in the CSV.

Add Fields

This menu allows you to choose from one of the available options in order to create a new field, based on existing fields from the CSV. These functions will not change the existing fields, only create new ones to store the result of a conversion.

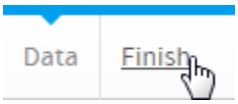
Date Conversion	This allows you to convert a non-standard format date field (one Yellowfin doesn't recognise as a date by default) to a recognised date/time field, by specifying its format. See Date Conversion for more information.
Timestamp Conversion	This allows you to convert values stored in Java time format (milliseconds since midnight January 1, 1970, GMT) to timestamps.
Numeric Conversion	This allows you to convert fields recognised as text by Yellowfin, that contain numeric values, to numeric fields.

Finish or Cancel

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Once the formatting and configuration of the CSV data is complete, you will need to do one of the following:

Finish

Clicking on the **Finish** link will complete the CSV import process, creating the CSV Table in the background, and will return you to the Drag & Drop step of the View Builder. From here you can drag your CSV table into the Entity Relationship Diagram, like any other table.



Cancel

Clicking on the **X** button in the top-right corner of the screen will cancel the import process. The CSV Table based on the file will be deleted. Select this option if you don't wish to go ahead with the import.



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