Report Builder CSV Import

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Load CSV

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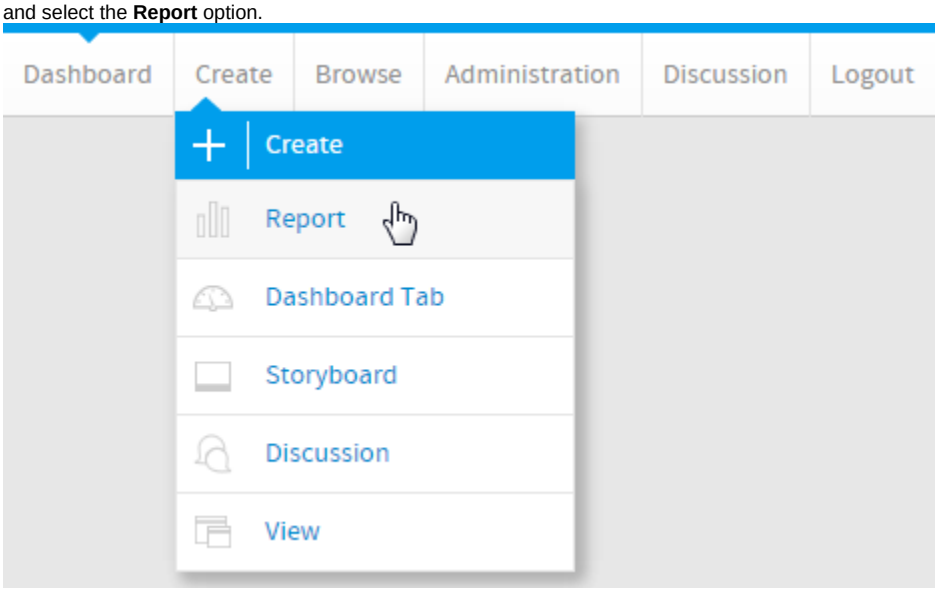
Before importing a CSV file you will need to ensure the functionality is enabled and your CSV file is ready.

> *See CSV Data Imports for more information.*

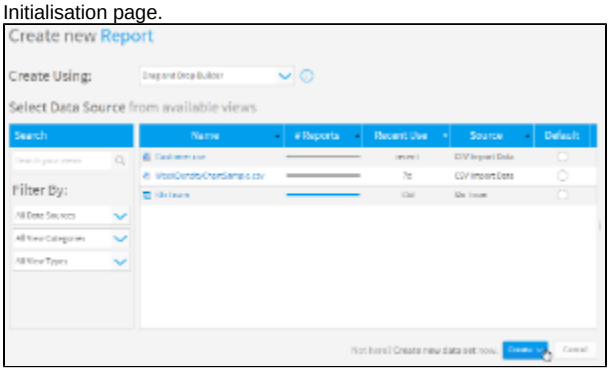
Create

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

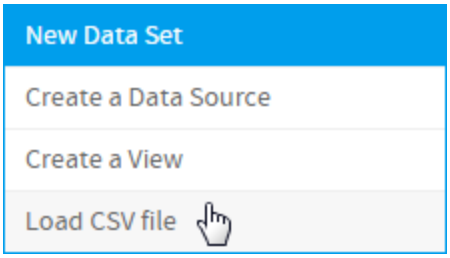
1. Click **Create** in the main navigation menu,
and select the **Report** option.



2. Click the **Create** button on the Report
Initialisation page.



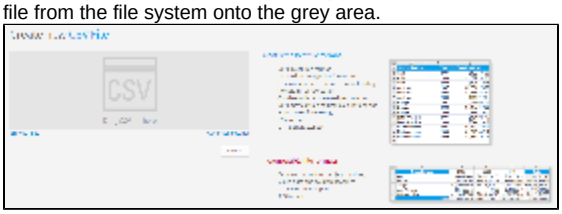
3. Select the **Load CSV file** option.



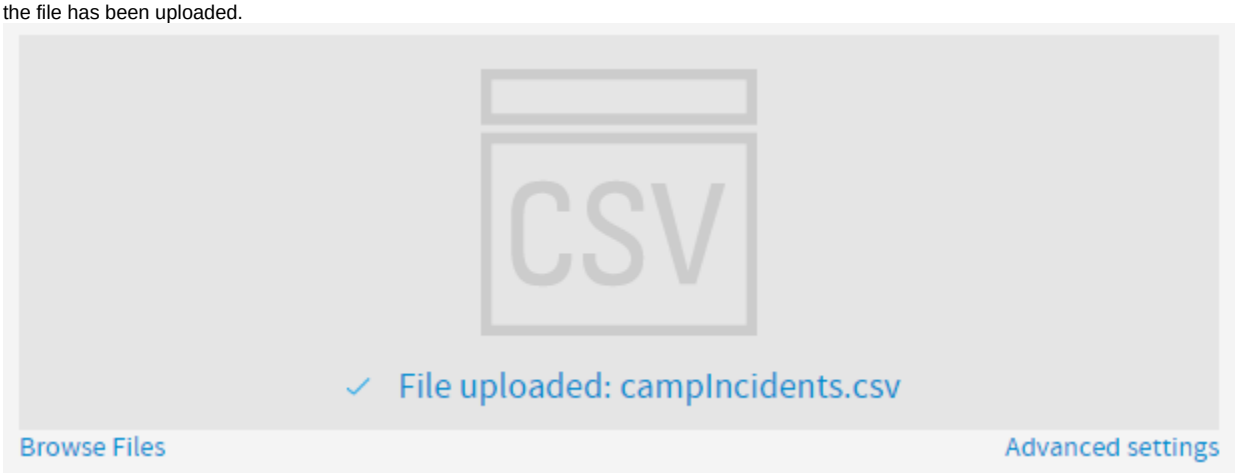
Load

From here you will be taken to the CSV File page, 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.

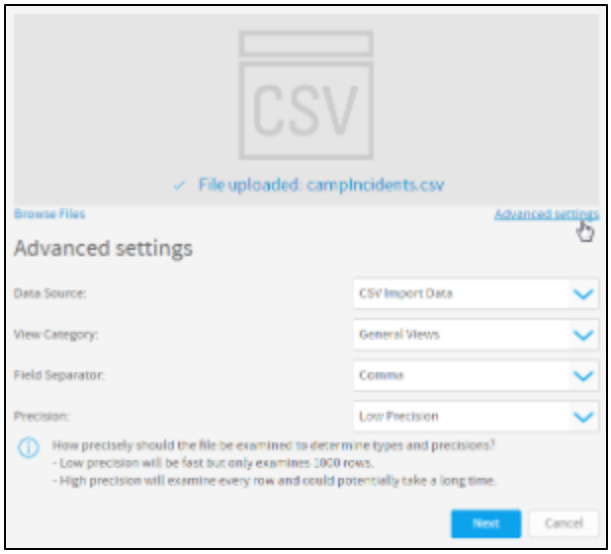


2. Once selected, Yellowfin will confirm that the file has been uploaded.



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:

- **Data Source** - this allows you to select the writable data source you wish to import the CSV data into.
- **View Category** - this allows you to select the view category to store the CSV view, Yellowfin will create, into.
- **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 formatting step.

Format & Configure Data

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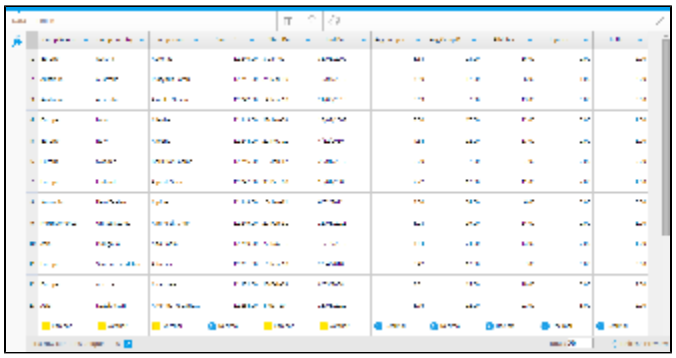
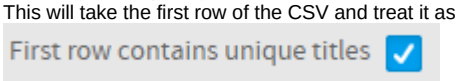
Once you've selected your file, and defined any settings required, you will be taken to the CSV Data step of the process. This is where you will be able to define several things, including Column Titles, Column Default Formatting Settings, CSV View Security, CSV View Settings, Additional Fields, and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



Data Step Options

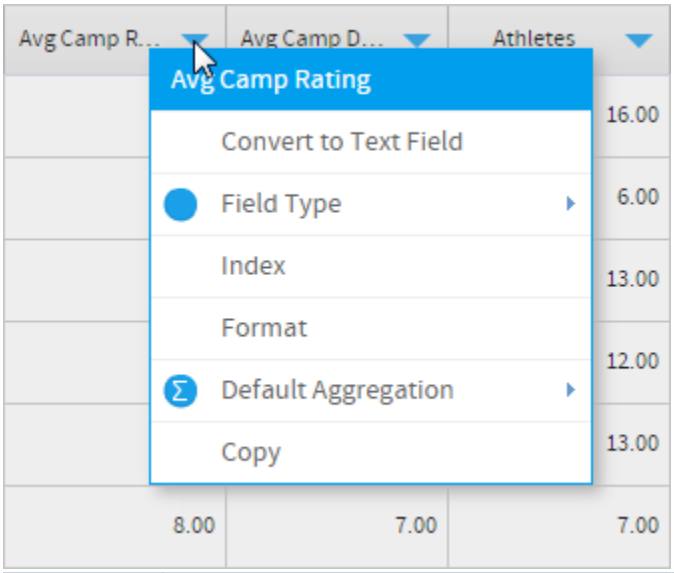
These options are available outside of the Data Step menus.

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.  If you wish to change some or all of the column titles displayed, there are two methods you can use. 1. You can click on the title, which will select it and allow you to enter new text, or 2. You can access the Column Formatting menu and change the Title there.

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 allows you to change the field from a Metric to a Dimension or Geography, or from a Dimension to Geography.
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.
Drill To	This allows you to define a Dimension field to Drill Down to.
Format	This opens the Column Formatting menu, allowing you to apply default formatting options and apply meta data to the field.
Default Aggregation	This allows you to assign a default aggregation to be applied to the Metric field when added to reports. This can be overridden in the Report Builder.
Copy	This allows you to create a duplicate copy of the field, which can then be formatted, converted, or changed separately to the original.

Column Formatting

Defining field meta data and formatting is an important part of View creation and as such, an important part of the CSV import process. The Column Formatting menu provides you with a range of options depending on the field type.

> *See Field Format for more information.*

Security

The CSV needs to have security defined in order to specify who can/cannot access and create reports based on the import. The security options defined here will be applied to the View that Yellowfin creates based on the CSV import. This will effect who can see the View listed on the Create Report page.

Unsecure	All users with functional access to data source the CSV is imported into can write reports against this CSV table.
Edit Restricted	Only specified users will be able to create reports using this CSV table. All other users will be able to read the reports created by other users on this table, as long as they have the correct report and category access permissions. Users will need to be specified either by their name or User Group, along with assigning Read, Edit, or Delete access levels to them.
Restricted	Only specified users will be able to read and/or write reports using this CSV table. Users will need to be specified either by their name or User Group, along with assigning Read, Edit, or Delete access levels to them.

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 View that Yellowfin will create at the end of the import process. This is how report writers will identify it in the list of views on the Create Report step.
Description	This will be the description of the CSV View that Yellowfin will create at the end of the import process. This should contain information about what's contained in the CSV, which report writers will have access to in the list of views on the Create Report step.
Default Cache Period	This will allow you to define the number of hours queried data based on this CSV should be stored in cache for reuse by other users. 0 will result in no queries being cached.
View Row Limit	This will allow you to define the maximum number of rows to be returned in reports based on this 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 the calculation or conversion.

Formula Builder	This allows you to create calculations using either the Calculated Field option, or the Grouped Values option.
Formula Templates	This allows you to create advanced calculations based on Pre-Defined Formulas.
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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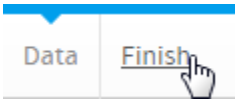
Once the formatting and configuration of the CSV data is complete, you will need to do one of the following:

Finish

Clicking on the **Finish** link will complete the CSV import process, creating the CSV View in the background, and will progress you to the Report Builder Data step. From here you can start creating your first report based on the CSV.



Cancel

Clicking on the **X** button in the top-right corner of the screen will cancel the import process. The CSV View 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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