

CSV Data Imports

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Overview

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Yellowfin's CSV functionality allows business users to transform their existing spreadsheets into reports. This means that any of Yellowfin's reporting capabilities can be quickly applied to spreadsheet contents, including the ability to drill down and categorise data. Yellowfin allows spreadsheet data (stored as CSVs) to be imported into a specified data source and used for reporting.

There are two methods for importing CSV data to use for report building:

1. [Create a Data Source](#) and follow the instructions for [CSV](#).
2. [Report Builder](#) process

Import Methods

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When importing a CSV file for reporting use, it's important to consider what the data will be used for, and which import method would best suit that use.

Report Builder Import

If the CSV has been developed for stand-alone use, or the CSV data needs to be stored in a separate data source from other reporting data, and the desired reporting results can easily be achieved with advanced sub query functionality, then the Report Builder import method should be used.

When the Report Builder import process is used, the following happens:

1. The user defines any calculations or converters to be applied to the data, creating additional fields in the final table.
2. The user defines all default formatting and relationships between fields, such as drill down, through the CSV step. These will be reused whenever someone selects this CSV for report building.
3. Yellowfin creates a View with all of the above fields, formatting, and relationships for reuse by other report writers. This View will be available during the report writing process, and the View itself can be edited by users with permission in order to adjust the default settings defined.

Setup

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Writable Data Source

Yellowfin requires a Data Source connection to be defined as writable in order to write the contents of the CSV file to a table in the database. Often the writable connection will be pointing to an empty database, created solely for the purpose of importing CSVs or caching views. This is to ensure that any imports are kept separate from the main data sources.

In order to define a writable connection, complete the following:

1. Navigate to **Administration > Admin Console**.
2. Expand the **Data Sources** section of the Admin Console main panel.
3. If you already have a connection defined that you wish to set to writable, simply click on the connection name, otherwise create a new connection by clicking the **Add** button.

4. Enable the **Writable** option under the **Usage Parameters** section in the **Data Source Settings**.

USAGE PARAMETERS

Max Rows Returned ⓘ ☒ Enable
10,000

Analysis Max Rows Returned ⓘ ☐ Enable

Writable ⓘ ☒ Enable

CSV Default ⓘ ☐ Enable

5. In the case that a user has permission to import a CSV, but not permission to access the advanced options, they will need there to be a writable source connection that has been set to the **CSV Default** so Yellowfin knows which connection to select for them. If this is the case for some of the users in the system, set the **CSV default** to **Yes**.

USAGE PARAMETERS

Max Rows Returned ⓘ ☒ Enable
10,000

Analysis Max Rows Returned ⓘ ☐ Enable

Writable ⓘ ☒ Enable

CSV Default ⓘ ☒ Enable

6. Complete the process by clicking the **Save** button at the bottom of the page.

Writable HSQL Data Source

Often when working outside of a Development, QA, or Production instance of Yellowfin, you may have a need to import CSV files on a temporary or trial basis. An example of this would be trialling CSV file formats on a temporary setup, or perhaps creating sample content in a Proof Of Concept (POC) type scenario. In this situation you may not want, or be able, to set up a stable database for the purpose of storing CSV data. A temporary solution to this would be to create a writable HSQL database, similar to the one you can install Yellowfin into. In order to do this, follow these steps:

Note: HSQL databases are not stable and should never be used as part of a long term solution.

1. Create a directory, within your Yellowfin installation directory, to store the HSQL database. For example:
C:\Yellowfin\HSQLdatabase
2. In Yellowfin, navigate to **Administration > Admin Console**.
3. Expand the **Data Sources** section of the Admin Console main panel.
4. Click the **Add** button.
5. Give your data source a **Name**, **Description**, and set the **Writable** option to **Yes**. You can also set it to **CSV Default**, this is optional.
6. Now provide the connection details:

Add A Data Source

PostgreSQL Database

You selected your Data Source, now lets add the connection settings to start pulling in your data. Nickname and Description are for your own benefit to help manage this connection later.

Connection Nickname

Connection Description (optional)

How To Connect ☒ Details ☐ Connection String

You may need to speak to your Database Admin in order to get the connection settings to set this up.

Authentication Adapter Standard Authentication

☒ Include Schema in SQL

Database Host

Database Port 5432

Back Save Test Connection Cancel

- 7.

- a. **Connection Method:** JDBC
 - b. **Authentication:** Standard Authentication
 - c. **Database:** HSQLDB Server
 - d. **Database Mode:** Embedded Mode
 - e. **Database:** C:\Yellowfin\HSQLdatabase\CSVdata
The value of this should be the directory you wish to store the HSQL database in, created in step 1, followed by the name of your database (Yellowfin will create this) - in this example we used **CSVdata** as the name.
 - f. **Username:** *leave this blank*
 - g. **Password:** *leave this blank*
 - h. **Schema:** None
 - i. **Isolation Level:** Read Uncommitted
8. Click on **Test Connection** to ensure a successful connection.

Add a Data Source

How To Connect: ☒ Details ☐ Connection String

You may need to speak to your Database Admin in order to get the connection settings to set this up.

Authentication Adapter: Standard Authentication

☒ Include Schema in SQL

Database Host: 172.24.16.47

Database Port: 5432

Database Name: yellowfin_csv

JDBC Driver: org.postgresql.Driver

User Name: peter

Password:

Advanced settings

Buttons: Back, Save, Test Connection, Cancel

9. Complete the process by clicking the **Save** button at the bottom of the page.

Role Permissions

In order for a user to import CSVs in Yellowfin they must have the appropriate role permissions defined. As there are two methods of importing CSVs, there are also two sets of role permissions available.

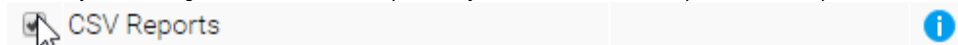
Report Builder

A user may be granted permission to import CSV files through the Report Builder. This is the less advanced import method of the two available. If the user needs to import CSV data through the Report Builder, they will require the following Role Permissions.

1. Navigate to **Administration > Admin Console**.
2. Open the **Roles** section and click on the role you wish to enable CSV access for.
3. Enable the following:
 - a. **Report Types** - this provides the user with access to advanced report authoring options, such as CSV Import.



- b. **CSV Reports** - this gives the user access specifically to the Load CSV File option on the Report Builder's initialisation step.



- c. **Advanced CSV Functionality** - this allows users to select advanced options, including which writable data source to use, rather than relying on the default option.



Note: this is an *optional* role permission.

4. Save the role.

Prepare CSV File

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Before the import process can begin, you will need to obtain or create your CSV file. There are some guidelines in place to ensure a compatible file.

Do

1. **Column Based** - ensure the data in your CSV is stored as columns, with no empty columns or rows at the start of the file (if examining through a spreadsheet tool).
2. **Date Format** - the date format recognised by Yellowfin is **yyyy/MM/dd**, so for example: **2014/08/31**. If possible, it's a good idea to ensure your dates are stored in this format. Yellowfin does have converters available as part of the import process, but ensuring your dates are in the correct format to start will avoid extra work during import.
3. **No Totals** - the CSV columns should not have any column or row totals applied, or other calculations and formats that may be lost during import, or mistaken for data values (rather than totals).
4. **Consistent Data per Column** - ensure that the data contained in each column is the same type throughout the file. This will ensure that Yellowfin can correctly identify and assign the field type for each column. For example, if you have a date column, and all the data is dates, except a few records that have the text "N/A", remove the text and leave that empty. This will mean Yellowfin recognises the field as a date, rather than text.
5. **File Format** - Yellowfin will only accept CSV files, no XLS, XLSX, or other formats will be accepted.

Don't

1. **Crosstab/Pivot** - do not attempt to import data that is in crosstab/pivot format as Yellowfin will examine the file as though it was in column format and as such will store the data in an unintended and unusable structure.
2. **Totals** - do not apply totals to your fields, as Yellowfin will not differentiate them from the rest of your data.
3. **XLS** - do not store your data in XLS or XLSX formats as Yellowfin will only read CSVs.

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