

The Import Process

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Overview

You can use the import feature to transfer content into a Yellowfin instance. This could be one of the files that were created during the export process.



Folders that have restrictions on them and require expert approval for their content to be made available to the users, will have this restriction removed during the import process. The status of the contents within these folders will be changed to *active*.

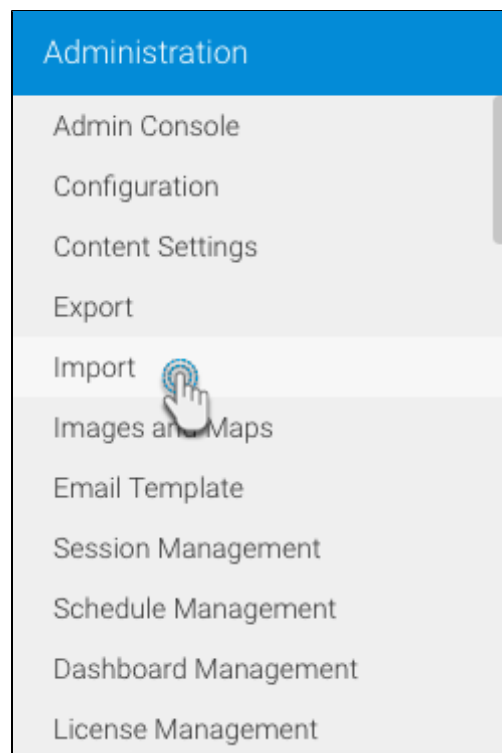
How to import content into Yellowfin

To import a content file into a Yellowfin instance, follow the procedure on this page.

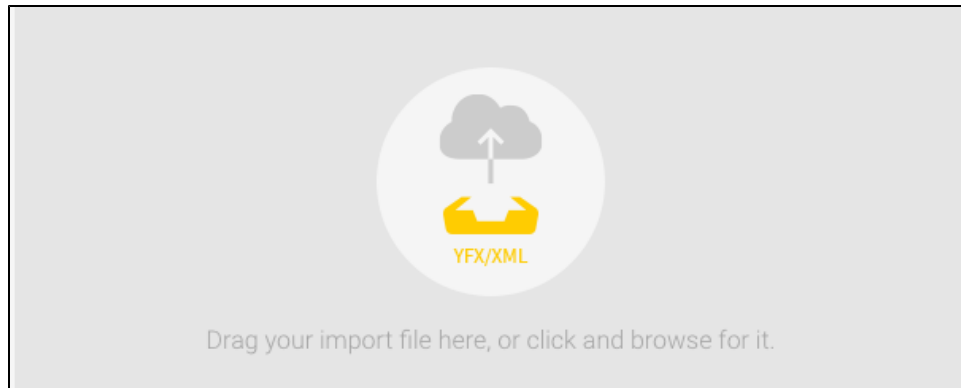
1. Through the main menu on the left, navigate to **Administration > Import**



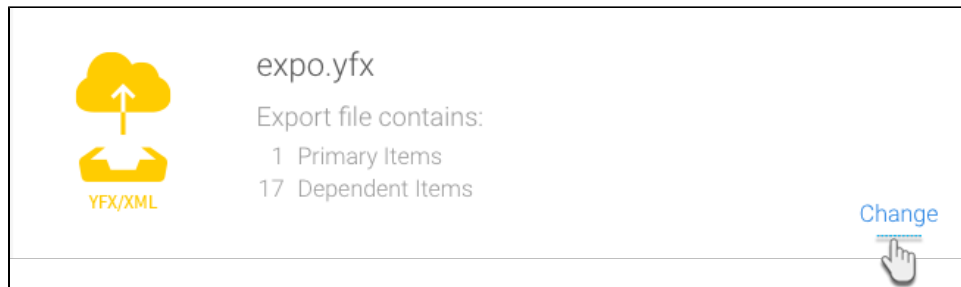
You could also get to the import screen by following the path below:
Administration > Admin Console > Import



2. You will now see a drop box panel where you can either drag and drop your file directly, or use it to browse and search for your file by clicking on it



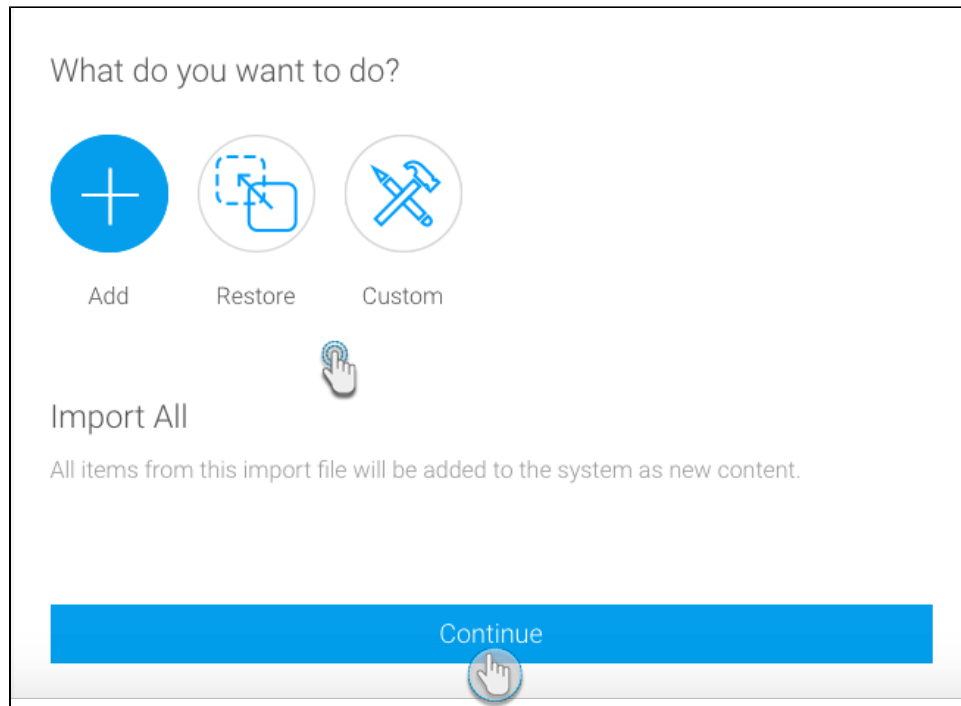
3. Once the file is uploaded, you will be able to see a quick overview of the contents it contains
4. If you want to remove this uploaded file, just select the change link



Yellowfin will scan the data from your file to see if any of it is already present in the system, and if so, it will display an error message alerting you of this. This helps you to not store double copies of your data and reports, even if they have a different name. (Yellowfin can match the universally unique identifiers/UUID of each file regardless of what their current name may be.)

5. Next, choose how to proceed with the import; Yellowfin gives you three options as explained below:
 - Add:** Select this option to import all the data from the file; this includes the primary and secondary content. (Note: If any of the data already exists in your new file, it will be added again anyway).
 - Restore:** This type of partial import lets you choose which of the primary content to import. You cannot choose between the secondary content, but the entire secondary content related to your chosen primary data will be imported as well.
 - Custom:** If you proceed with this selection, you can choose the primary *and* secondary content to import. This way you can customise the content that you want to import, any way you like, giving you full control

6. After selecting one of these buttons, click on the continue button



7. The following few steps differ according to your previous selection. You can view them by clicking on [All](#), [Restore](#) or [Custom](#)



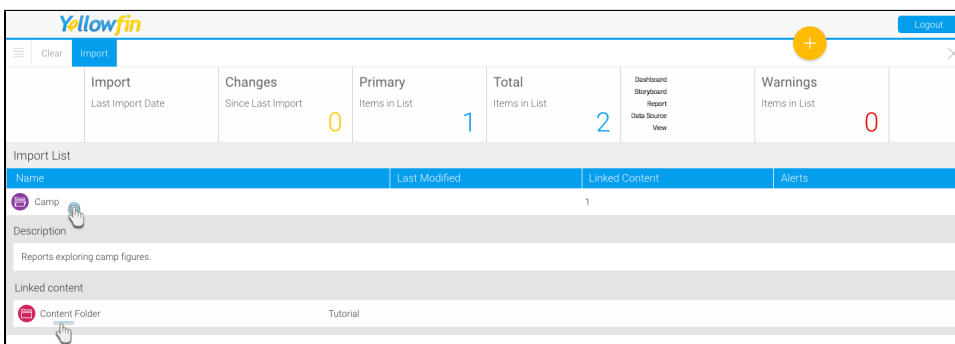
Note

For a more detailed understanding of the status bar at the top of the import screen, click [here](#).

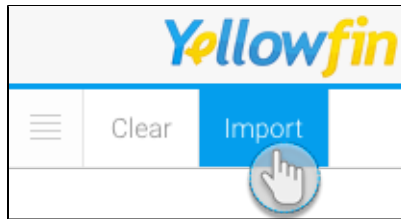
Importing the entire content list

Since you have selected to import the entire contents of the import file, you will not need to sift through the search panel contents.

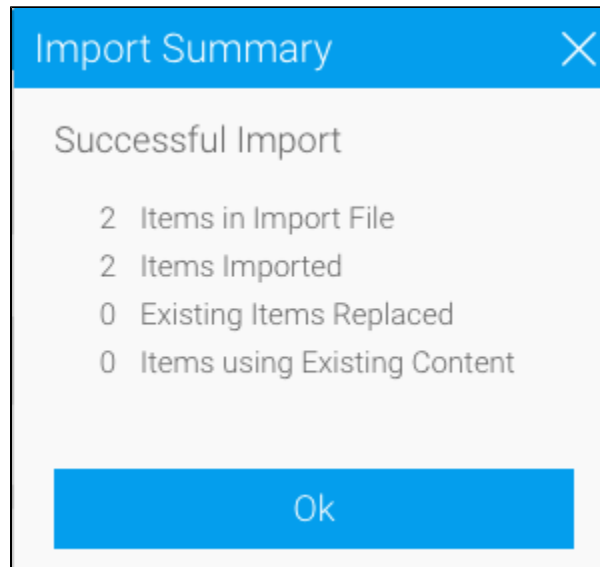
1. Click on the name of the content in the import list to view its descriptions and secondary content list



2. Once satisfied, use the Import button to import this data into your system



3. If you're successful, you will see a summary of the data that was imported



Or [go back](#) to select another option.

Restoring the primary content

If you selected the restore option to include only the primary content, then that's the only type of content you will be able to see in the search panel of this import screen

1. Drag and drop the primary content into the import list
2. Click on the settings icon next to a content record

Import List				
Name		Last Modified	Linked Content	Alerts
 Analysis		14/12/2013 2:57 PM	20	

3. Now you can choose to do either of the following:
 - a. Add this content (regardless of whether it already exists in your system, this data will be imported anyway, which could at times lead to double copies). Then click on the Import button
 - b. Or click on the replace existing option to substitute any existing content in your system with this one
 - Then select which existing material you want to replace with the new data from the list

☐ Add
☒ Replace Existing

Admin

The current and import items don't have the same UUID so they may not match.

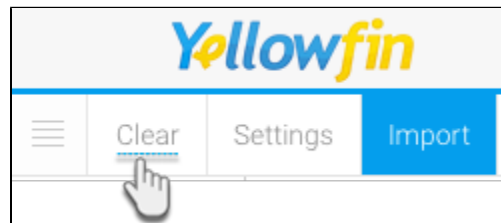
Match Linked Content

- Yellowfin will run a check for you to see if any existing file has the same UUID as the one you have selected, and warn you accordingly
 - If you don't feel like examining the entire content list to find the matching content to replace, just click on the Match Linked Content button and Yellowfin will find the corresponding content for you
 - Click on the Import button on the top left side of the screen
4. After the data is imported, a quick summary of it will be displayed

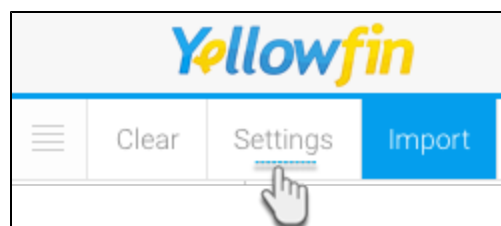
Or [go back](#) to select another option.

Importing customised content

1. Since you have chosen the *custom* option, you can see a list of the primary and secondary content in the import screen's search panel
2. Drag and drop any or all of content into the import list, that you want imported into your system
3. If there is something broken or missing from the content, Yellowfin will alert you with a warning message. (Click [here](#) for more information on this.)
4. To remove the entire content list selection, click on the clear button on the top left of the screen



5. You can also map major items like data sources and content folders that you're trying to import with the material already existing in your system, to make sure the content isn't being repeated (if you don't want to import the folders from the export file). Use the settings button in the top left corner for this



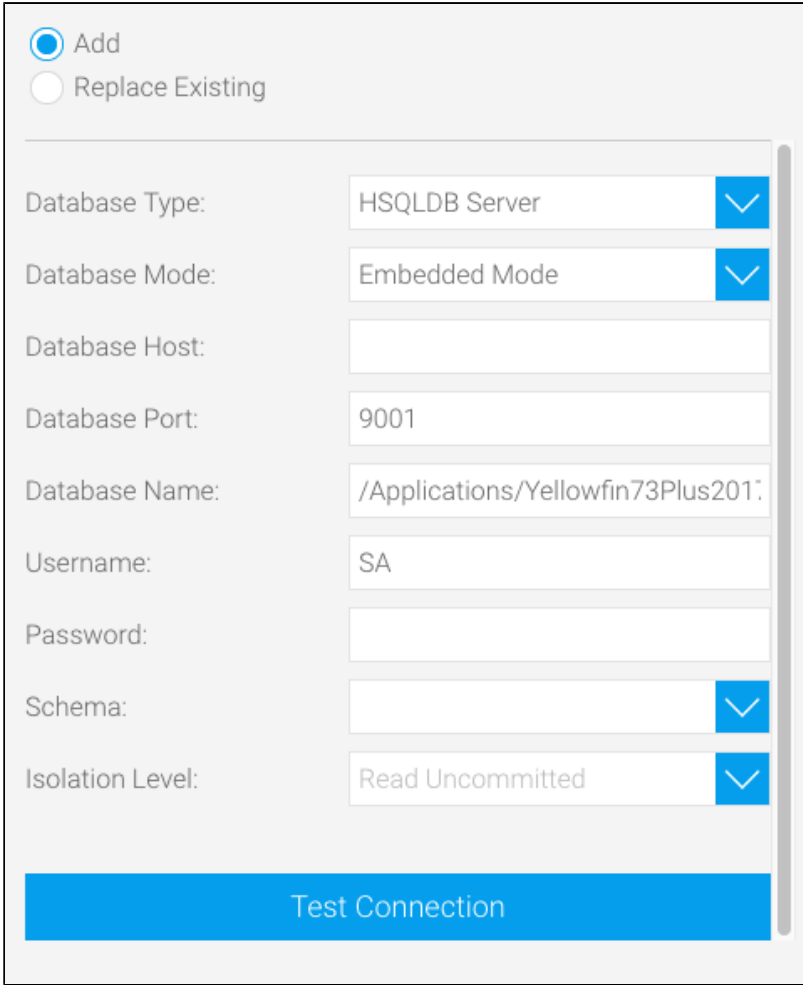
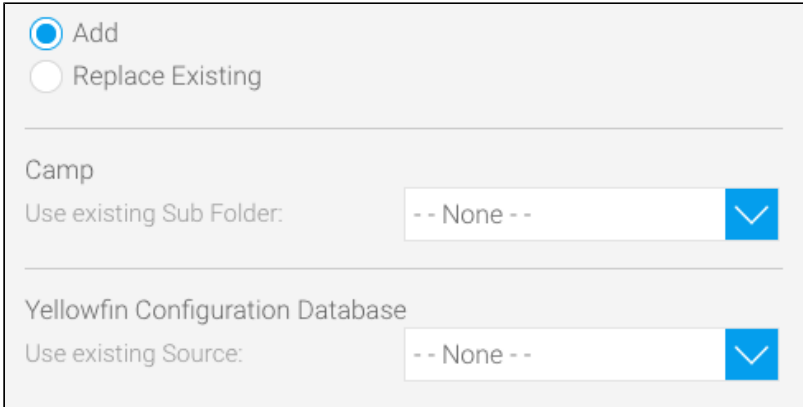
6. Now you can link any existing data source and/or folders where your content will be moved to
 - a. Enable the button that says *use existing sources*, then select a pre-existing data source to link to your import content

Use Existing Sources

Ski Team -- None --

Yellowfin Configuration Database -- None --

- b. Similarly perform the same steps for the *use existing sub folders* feature to map to any pre-existing folders
7. Once you have included content to the import list, click on the settings icon next to a content record
8. Then either add this content in its entirety as new material or replace it with any existing data
- a. Add New: Depending on what type of content it is, the add screen's form will differ. (For a quick insight into the varying fields of the different forms, view the table below.)

Icon	Content type	Screenshot	Fields
	Data source		When importing a data source, you could add/modify the following connection details from the export file. Database type: Select the type of database you're adding. Database mode: Choose your preferred database mode from this list. Database host: Link your database host here. Database port: Enter your database port number. Database name: The name of your database. Username: Your database's administrator's username. Password: Password to the above account. Schema: Select the schema. Isolation level: Choose the isolation level. Test connection: Click on this button to test out the database connection. Note: When importing data sources with access filters created with SQL queries or reports, you can specify the exact data source and reports for the access filters.
	Views		Note: These fields appear depending on what other content is added to the list. For example, if a data source is also included, the source field will not appear in this window. Use existing sub folder: Select a sub-folder for your view content (if no such selection has been included already). Use existing source: Select a data course from your already existing data.

	Re por ts	☒ Add ☐ Replace Existing Admin Reports Use existing Sub Folder: -- None -- Yellowfin Usage Audit Use existing View: -- None --	Use existing sub folder: Select a sub-folder for your view content (if no such selection has been included already) Use existing view: Select a pre-existing view to link with your report
	Da sh bo ards	☒ Add ☐ Replace Existing Admin Reports Use existing Sub Folder: -- None -- Top N Views by Report Usage Use existing Report: -- None -- Top N Longest Avg Report Rows Use existing Report: -- None -- Top N Data Sources by Report Usage Use existing Report: -- None -- Top N Slowest Avg Report Run Time Use existing Report: -- None --	The example screenshot shows that there are numerous reports and a sub folder that this dashboard depends on that weren't included in the content list; therefore, you will have to select replacement reports and folders in place of them.

Storyboard	This content type is not able to be replaced Use existing Image: -- None -- ▼ Use existing Theme: -- None -- ▼ Training Use existing Sub Folder: -- None -- ▼ YF7 Admin Menu Use existing Image: -- None -- ▼ YF7 Admin Console Use existing Image: -- None -- ▼ YF7 Licence Countdown	The example screenshot shows that there are numerous images that this storyboard depends on that weren't included in the content list; therefore, you will have to select replacement images as substitution.
Themes	☒ Add ☐ Replace Existing Use existing Image: -- None -- ▼ Ski Team Green Title Use existing Image: -- None -- ▼ Ski Team Green Content Use existing Image: -- None -- ▼ Ski Team Orange Title Use existing Image: -- None -- ▼ Ski Team Blue Content Use existing Image: -- None -- ▼ Ski Team Blue Title	The example screenshot shows that there are numerous images that this theme depends on, that weren't included in the content list; therefore, you will have to select substitute images to replace them.

	Images	This content type is not able to be replaced	No specific fields for this type of content.
	Folders	☒ Add ☐ Replace Existing	No specific fields for this type of content.
	Sub folders	☒ Add ☐ Replace Existing Use existing Folder: -- None -- 	Use existing folder: If you haven't included a folder in your import list, then you should select one from the existing content.
	GeoPack	☒ Add ☐ Replace Existing	Note: This content type will only appear if a GeoPack has been included.

b. Replace: Or instead of adding the content as new material, you can just use it to replace any existing data in your system. Follow the steps below to replace content:

- Click on the replace existing option for a content type
- Then select any of the existing material from the list that you want to replace with the new data
- Yellowfin will run a check for you to see if any existing file has the same UUID as the one you have selected, and warn you accordingly

☐ Add
☒ Replace Existing

Ski Team 

The current and import items don't have the same UUID so they may not match.

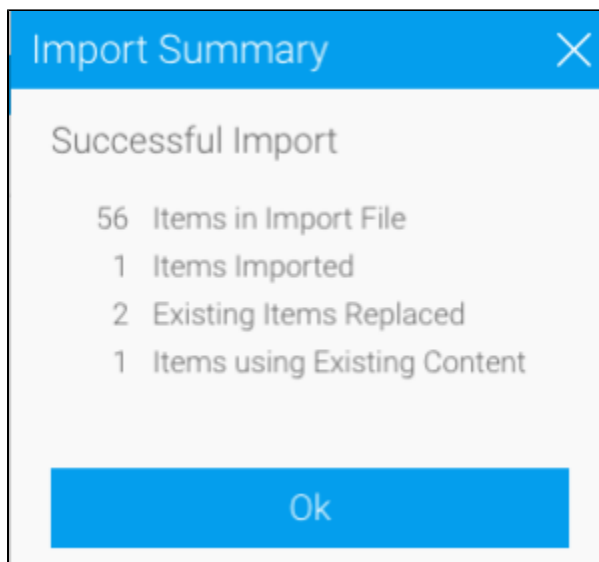
Match Linked Content

- If you don't feel like sorting through the entire content list to find which content to replace, just click on the Match Linked Content button and Yellowfin will find the matching content for you to replace

9. After filling out the add/replace window, click on the Import button on the top left corner of the screen



10. After the data is imported, you will be able to see a summary of it



11. Click Ok and celebrate having successfully imported customised data.

Or [go back](#) to select another option.

Importing charts with default formatting

In Yellowfin version 9, default chart and report formatting had been updated to change the look and feel of charts. This makes charts with the version 9 formatting look different from previous charts which followed a different default formatting.

Imported charts will retain the default formatting of the version the report was exported from. For example, if a report was exported from version 8 or older, and imported into version 9, the previous default formatting will be applied to its charts.

Related links:

[Importing or Exporting Data](#)

[The Export Process](#)

[Searching for Export Content](#)

[Navigating the Status Bar](#)