



CSV Connector v2.0  
User Guide

A large, light green circular graphic with a white border, containing the letters "CSV" in a bold, white, sans-serif font. The graphic is centered on the page and is surrounded by a faint, light grey background pattern of interconnected lines and dots, resembling a network or data flow diagram.

CSV

## CSV Connector Introduction

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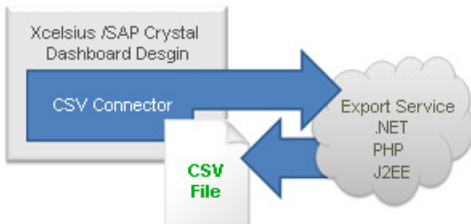
CSV Connector v2.0 for Xcelsius and SAP Crystal Dashboard Design provides direct connectivity to any CSV file with point and click simplicity. CSV connector is the perfect solution for data integration when information originates from Excel or legacy applications.

CSV Connector is configured as an Xcelsius data connection allowing you to connect directly to CSV (comma separated), tab delimited or semi-colon delimited data. Load CSV data from a web server or local file system without dependencies on web services or server-side scripts. Generate a preview of the data within the property sheet and bind your data with point and click ease. See how CSV Connector works

Export Data: New to CSV Connector 2.0 is an ability to export streaming data. This new feature provides dashboard designers with flexibility to export and open CSV files or persist data remotely where it can be easily recalled by CSV Connector. [Learn More](#)

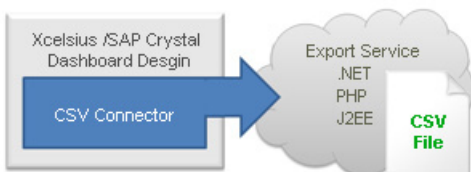
### Exporting CSV files

Stream any data range from your dashboard directly to a service that will automatically generate and open on an dashboard user's computer. With one single click, CSV Connector facilitates a transparent export scenario for business users users to extract data from their dashboards.



### Persisting CSV files remotely

Store CSV files on any web server using an export service and then load the data back into your dashboard using the same CSV Connector instance. Whether you need to quickly archive dashboard data or store user scenarios, CSV Connector provides a quick and easy method to save data directly from Xcelsius dashboards.



## Install Requirements

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### Client Requirements

Xcelsius 2008 Service Pack 1  
Xcelsius Add on Manager (Included with SP1 Install)  
Adobe Flash player 9 and higher

### Install Disk Space

2 MB

## Install Directions

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### Client Requirements

1. Open Xcelsius 2008  
\*Make sure you have the latest service pack and hotfix installed.
2. Click File>Manage Add-Ons
3. Click on Install Add-On.
4. Navigate and to the downloaded CSV Connector.xlsx file.
5. Close the Add-On Manager
6. Re-open Xcelsius 2008 to access CSV Connector, located in the Data Manager.

## More Information

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If you have any questions about this document please contact Centigon Solutions support at:

[support@centigonsolutions.com](mailto:support@centigonsolutions.com)

For more information, documentation, or templates for Background Builder, visit the website at [www.centigonsolutions.com/components/backgroundbuilder.html](http://www.centigonsolutions.com/components/backgroundbuilder.html)

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# Properties Sheet Overview

## Definition

**CSV Data URL-** CSV URL- Define absolute or relative URL for the CSV file. CSV Connector supports http:// for remote CSV files and file:// for files located on a local or network drive.

**Data Destination-** Bind the data range where the csv data will be loaded into during runtime.

**Start/End Column Index-** Define optional starting and ending index (numeric value) columns that you would like to load into the Xceslsius model. Leaving these properties blank will load all data. A modification to any of these properties can be previewd on the “Data Preview” tab.

**Start/End Row Index-** Define optional starting and ending index (numeric value) rows that you would like to load into the Xceslsius model. Leaving these properties blank will load all data. A modification to any of these properties can be previewd on the “Data Preview” tab.

**Filter Columns-** To refine the CSV data loaded into your Xcelsius model, you can utilize CSV Connector filtering capabilities. The CSV filter will evaluate each column within your data before it is loaded into your Xcelsius dashboard, facilitating a more scalable dashboard solution when large data volume requirements exist.

*Define your filter range-* CSV Filters should be bound to a cell range (row) with the same number of columns as the destination range.

*Display all rows (wildcard)-* If you do NOT want to filter a specific column within your range, you can simply enter an asterisk (“\*”) which notifies the filter property

<b>Filters</b>	*	*	*	*	North
<b>Data Destination</b>	34	33	44	32	North
	64	23	66	22	North
	12	18	33	31	North

The screenshot shows the 'Definition' tab of the CSV Connector Properties Sheet. It features a top navigation bar with icons for Definition, Data Preview, Usage, and Export. The main content area includes the following fields:

- Name:** Connection 2
- CSV Data URL:** [Empty text box with a selection icon]
- Data Destination:** [Empty text box with a selection icon]
- Data Output Definition:**
  - Start Column Index:** [Empty text box with a selection icon]
  - End Column Index:** [Empty text box with a selection icon]
  - Start Row Index:** [Empty text box with a selection icon]
  - End Row Index:** [Empty text box with a selection icon]
- Filter Columns:** [Empty text box with a selection icon]
- Column Calculations:** [Empty text box with a selection icon]
- Column Calculation Index:** [Empty text box with a selection icon]
- Delimiter:** Comma (dropdown menu)

# Properties Sheet Overview

## Definition (continued)

**Column Calculations-** CSV Connector can dynamically aggregate data contained in a CSV file before it is loaded into the dashboard. Column Calculations identifies how each column of data in the destination range is aggregated. Each column requires a column calculation key listed below.

**Define column calculations range-** CSV column calculations should be bound to a cell range (row) with the same number of columns as the destination range

### Define calculation values

- 1= **List**- Comma separated
- 2= **Count**- # Rows
- 3= **Sum**- Sum of values
- 4= **Average**- Average of values

Column Calcs	1	List	Count	Sum	Average
Destination	1	1	2	3	4
North		LA,NY	2	550	6%
South		FL,GA,TN	3	1220	4%
West		CA	1	340	3%

Source Data	Region	Office	ID	Employee	Turnover
	North	LA	43465767	120	9%
	North	NY	23423534	430	3%
	South	FL	63234534	650	2%
	South	GA	73234111	130	4%
	South	TN	43654765	540	6%
	West	CA	34578882	340	3%

**Column Calculations Index-** Single value index that identifies the column where calculations are applied. CSV Connector will locate all distinct values within the column and then run calculations for all other columns based on column calculation definitions.

**Delimiter-** CSV Connector can use one of 3 popular delimiters including Comma “,” Semicolon “;” and Tab “\t”.

The screenshot shows the configuration interface for a CSV Connector. It features a top navigation bar with icons for Definition, Data Preview, Usage, and Export. The main configuration area includes the following fields:

- Name:** Connection 2
- CSV Data URL:** [Empty text box]
- Data Destination:** [Empty text box]
- Data Output Definition:**
  - Start Column Index: [Empty text box]
  - End Column Index: [Empty text box]
  - Start Row Index: [Empty text box]
  - End Row Index: [Empty text box]
- Filter Columns:** [Empty text box]
- Column Calculations:** [Empty text box]
- Column Calculation Index:** [Empty text box]
- Delimiter:** Comma (selected from a dropdown menu)

# Properties Sheet Overview

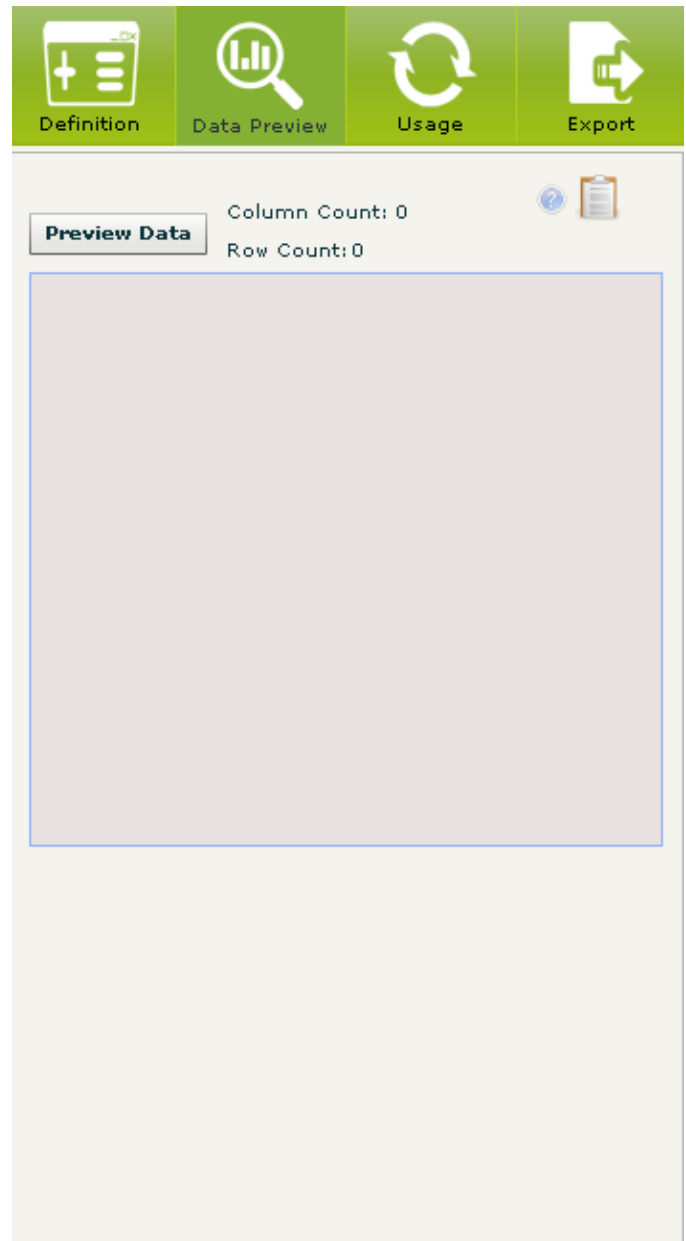
## Data Preview

**Preview Data-** Load the entire CSV file into the preview window. Preview data will recognize Start/End Row & Column Index and filter row properties to provide a true representation of the exact data that will be loaded into your Xcelsius dashboard.

**Copy to Clipboard-** Simplify the dashboard development process by copying the CSV data to your system clipboard. With the data available in your system's clipboard you can paste it directly into your Excel worksheet within the Xcelsius development environment, thus making it easier to mockup your data and build visualization.



**Column/Row Count-** View the total number of rows and columns within your CSV file.



# Properties Sheet Overview

## Usage Tab

**Refresh on load-** Load CSV data when the SWF file is first loaded and initialized

**Refresh on interval-** Load CSV data on a interval in seconds or minutes

**Refresh trigger cell-** Define a trigger cell that serves as a listener for an event within your dashboard.

**When value change-** When the trigger cell value changes, the CSV connection will refresh.

**When value becomes-** When the trigger cell equals this value, the CSV connection will refresh

The screenshot shows the 'Usage' tab of a Properties Sheet. The tab bar at the top has four buttons: 'Definition', 'Data Preview', 'Usage' (which is active and highlighted in green), and 'Export'. Below the tab bar, the 'Usage' section is visible. It starts with a 'Refresh Options' section, which includes a checked radio button for 'Refresh Options', an unchecked checkbox for 'Refresh On Load', and an unchecked checkbox for 'Refresh Every' with a value of '1' and a unit dropdown set to 'Seconds'. Below this is the 'Refresh on Trigger' section, which has a 'Trigger Cell' input field with a selection icon. There are two radio button options: 'When Value Changes' (which is selected) and 'When Value Becomes'.

# Properties Sheet Overview

## Export Tab

**CSV Export Service URL-** The service that will consume exported CSV data and then generate the output file. The export service URL will always start with HTTP(S) and connect to a service located on a web/application server. The

\*The CSV Export service is NOT a URL to the CSV file that you save to but rather a service that will create the CSV file(s).

**URL is WSDL-** For advanced services, CSV Connector can utilize a WSDL to simplify the development process. Reference documentation or contact your service administrator to indicate if the service URL is a WSDL.**Open CSV After Save-** Following the successful CSV data export and creation of a file, the connector will open the file in a new browser window automatically.

**Source Data-** CSV Connector export uses a separate Source Data property than the “Definition” tab to enable you to export independent data. This property defines the data that you will export.

**NUMBER FORMATTING-** CSV Connector will NOT inherit cell number formatting.

**Export File Name-** The name of the CSV File that is generated after exporting data. When defining the file name you will need to include the .CSV extension.

*Example: yourfilename.csv*

**Export File Path-** The path where the CSV file will be saved. The file path is ALWAYS relative to the service URL unless your developer have customized the export services.

*Example: “subdirectory/”*

**Returned URL-** CSV will wait for a response from the export service to return the absolute URL for the CSV file that was generated.

**Open File After Save-** Enabling “Open After Save” will trigger CSV Connector will automatically open the exported file in a browser upon successful export.

**Refresh trigger cell-** Define a trigger cell that serves as a listener for an event within your dashboard.

**When value change-** When the trigger cell value changes, the CSV connection will refresh.

**When value becomes-** When the trigger cell equals this value, the CSV connection will refresh.

CSV Connector by itself is NOT capable of physically generating files on your desktop or on a server. This is due to Flash restrictions that actually protect your computers from malware. CSV Connector relies on basic web services to transact data from the Flash runtime to generate output files. In an effort to facilitate rapid innovation and adoption, Centigon Solutions has released these services as open source projects independent from CSV Connector. Regardless of platform, browser, or scripting language CSV Connector can communicate with any export services written in .NET, PHP, and J2EE.

<http://code.google.com/p/csv-export-webservice>

The screenshot displays the 'Export' tab of the CSV Connector configuration interface. It features a navigation bar with four icons: 'Definition' (a plus sign in a box), 'Data Preview' (a magnifying glass over a bar chart), 'Usage' (a circular refresh icon), and 'Export' (a document with an arrow). Below the navigation bar, the 'Export Options' section contains several fields: 'CSV Export URL' with a text input and a file selection icon; 'URL Is WSDL' with an unchecked checkbox; 'Source Data' with a text input and a file selection icon; 'Export Service Input Values' section with 'File Name' and 'File Path' fields, each with a text input and a file selection icon. Below these are 'Returned URL' with a text input and a file selection icon, 'Open File After Save' with an unchecked checkbox, 'Refresh on Trigger' with a checked radio button, and 'Trigger Cell' with a text input and a file selection icon. Two radio buttons are present: 'When Value Changes' (selected) and 'When Value Becomes' (unselected). At the bottom, there is a checkbox for 'Show Advanced Web Service Options' which is unchecked.

# Properties Sheet Overview

## Export- Advanced Properties

### Advanced Web Service Options:

The advanced web service options are designed to give developers flexibility and control over the parameter values that are passed to their custom export service during export operations.

**File Parameter Name-** The File Parameter Name property may be changed if you are using an HTTP Service, to change the name of the File Parameter from its default, which is currently fileName as shown in the URL example below. This will change the value of the parameter name that is appended to the URL, enabling you to use a custom parameter name for this particular parameter in your custom HTTP Service.

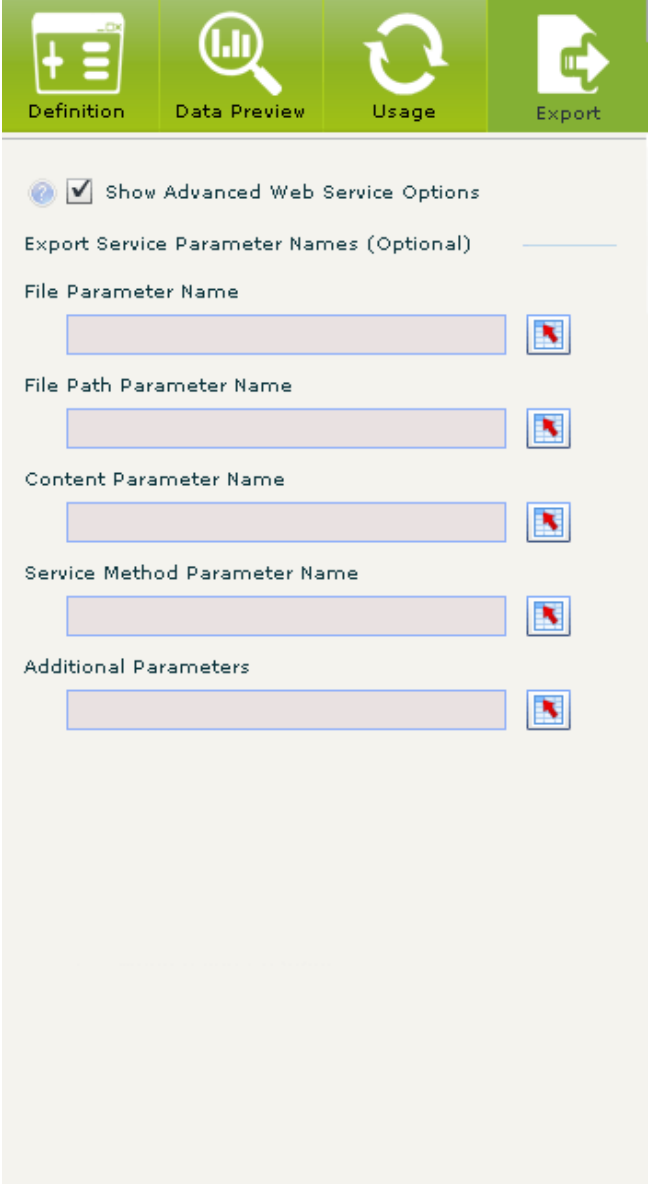
i.e. `http://...&fileName=exportFileNameValue;`

**File Path Parameter Name-** The File Path Parameter Name property may be changed if you are using an HTTP Service, to change the name of the File Path Parameter from its default, which is currently filePath as shown in the URL example below. This will change the value of the parameter name that is appended to the URL, enabling you to use a custom parameter name for this particular parameter in your custom HTTP Service.

i.e. `http://...&filePath=exportFilePathValue;`

**Content Parameter Name-** The Content Parameter Name property may be changed if you are using an HTTP Service, to change the name of the Content Parameter from its default, which is currently content as shown in the URL example below. This will change the value of the parameter name that is appended to the URL, enabling you to use a custom parameter name for this particular parameter in your custom HTTP Service.

i.e. `http://...& content=exportContent;`



The screenshot shows the 'Export' tab of the Properties Sheet. At the top, there are four icons: 'Definition', 'Data Preview', 'Usage', and 'Export'. The 'Export' tab is selected. Below the icons, there is a section titled 'Show Advanced Web Service Options' with a checked checkbox. Underneath, there is a section titled 'Export Service Parameter Names (Optional)'. This section contains five input fields, each with a small icon to its right: 'File Parameter Name', 'File Path Parameter Name', 'Content Parameter Name', 'Service Method Parameter Name', and 'Additional Parameters'.

# Properties Sheet Overview

## Export Tab- Advanced Properties (Continued)

**Service Method Parameter Name-** The Service Method Parameter Name property may be changed if you are using a Web Service (NOT an HTTP Service), to change the name of the Web Service Method being called from its default, which is currently SaveCsv. If a custom web service method is being used, ensure that the 3 default properties mentioned in the Additional Parameters section below are being implemented in the order they have been specified.

**Additional Parameters-** The Additional Parameters property enables developers to append additional parameters and/or values for both HTTP and Web Service calls.

- For HTTP Services, you may bind to a range of cells where each cell contains a comma-separated value equal to a parameter name and corresponding parameter value (name,value). These additional parameters will be appended to the URL used in the HTTP Service call using the name,value pairs assigned. Any number of additional parameters can be used.
- For Web Services, you may bind to a range of cells where each cell contains an additional parameter value to be passed to the web service. The following 3 values will ALWAYS be sent as the first 3 parameter values and must be implemented for any Web Service being used. All additional parameters will follow the first 3 and will be sent in the order that they have been specified.

- Export File Path
- Export File Name
- Content

The screenshot shows the 'Export' tab of a software interface. At the top, there are four tabs: 'Definition', 'Data Preview', 'Usage', and 'Export'. The 'Export' tab is active. Below the tabs, there is a section titled 'Show Advanced Web Service Options' with a checked checkbox. Underneath, there is a section titled 'Export Service Parameter Names (Optional)'. This section contains five input fields, each with a label and a small icon to its right:

- File Parameter Name
- File Path Parameter Name
- Content Parameter Name
- Service Method Parameter Name
- Additional Parameters

# Properties Sheet Overview

## Information Tab

\*All elements on the Information tab require an internet connection.


**Help-** Online documentation and support contact information.

**Tutorials-** Online tutorials, articles, and white papers for all available components,.

**Available Components-** A real time list of all available components from Centigon Solutions. Selecting any component from the list box will launch a browser that navigates to component specific information.

**Send this Component to a Friend-** Share information about this component with other colleagues who use Xcelsius. Enter you friend's e-mail address, and Centigon Solutions will send collateral information and trial download instructions to the recipient.

**Information**



**Links**

**Help**

**Tutorials**

**Templates**

**Available Components**

Background Builder

Dynamic Sort

**Send this component to a friend**

Email

## Connect to CSV Files on a Web/ Application Server

### Relative Path example: data/xyz.csv

When connecting your Xcelsius SWF to a CSV file, where the SWF exists on the same server as the CSV, you can utilize a relative URL without any additional configuration. In the example above the “xyz.csv” file is located in a sub-directory called “data.” If the SWF and CSV file were in the same directory, you could use “xyz.csv.”

**\* Relative will NOT work inside of Xcelsius development environment or in Preview mode because preview SWFs are generated in the TEMP directory, which is not relative to the CSV file.**

### Absolute Path example: http://servername/data/xyz.csv

When connecting your Xcelsius SWF to a CSV file, where the SWF exists on the local PC or on a different server, you can utilize an absolute URL. This configuration requires a cross domain policy file, which grants access for the flash player to load data into the SWF. The crossdomain.xml file should be loaded into the root directory of the web/ application server where your CSV file exists.

**Example IIS root: /inetpub/wwwroot**

**Example Tomcat root: /webapps/ROOT**

## Connect to CSV Files on your Desktop or File Share

### Relative Path example: data/xyz.csv

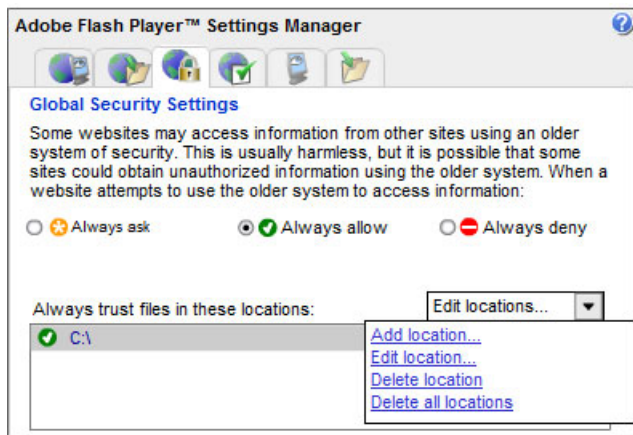
When connecting your Xcelsius SWF to a CSV file, where the SWF exists on the same site or local PC directory structure as the CSV, you can utilize a relative URL without any additional configuration. In the example above the “xyz.csv” file is located in a sub-directory called “data.” If the SWF and CSV file were in the same directory, you could use “xyz.csv.”

### Absolute Path example: file://c:/data/xyz.csv

When connecting your Xcelsius SWF to a CSV file, where the SWF exists on the local PC but in a different directory, you can use a “file://” prefix to define an absolute path to the file.

\*A SWF that is accessed from a web/application server cannot access CSV files on the local file system due to flash security settings.

\*To load CSV data from the local file system using an absolute URL you will first modify your Flash Player Global Security Settings and grant access to the local drive where your CSV data is located. See instructions below for detailed instructions.



### Configure your PC to load CSV data from your local PC file system

1. Open Global Flash Player Security dialogue
2. Upon opening the Flash Player Security settings, you will add the directory or network location where your CSV file is located. In the example shown below, the flash player can access any directory on the C: drive to load data into a SWF.
3. Upon making changes, you can close your browser window and re-launch your Xcelsius generated SWF.