

# How do I upload an Excel or CSV file as a source?

## Overview

Lets you upload an Excel (.xlsx) or CSV (.csv) file as a data source for dashboards. Vantage reads the file's columns and rows and makes the data available to widgets. You can upload multiple files and later join them using relationships.

## When to Use

Use this feature when:

- You want to turn spreadsheet data into charts and KPIs
- You have data exported from another system (ERP, HRMS, POS)
- You need a one-time or periodic snapshot instead of a live connection
- You want to prototype a dashboard quickly with real data

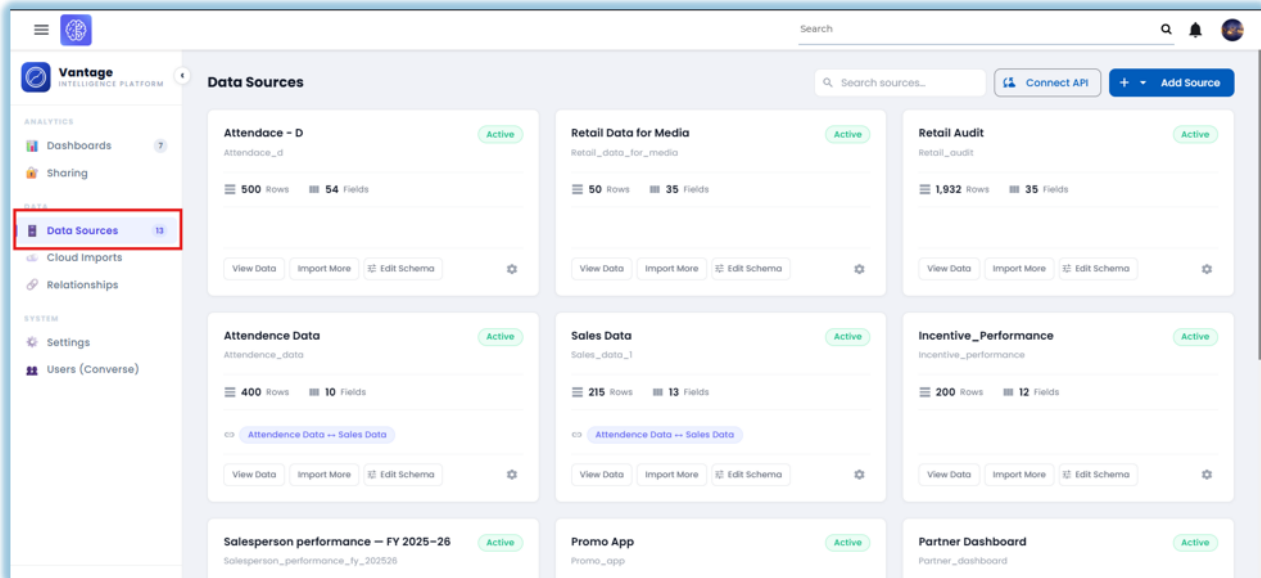
## Concepts

- **Data Source** – A named data set inside Vantage that widgets query
- **Connector** – The method used to bring data in (Excel/CSV, API, or internal forms)
- **Ingest** – Automatic process that loads your file into Vantage's analytics engine
- **Column Mapping** – Vantage's detected name and type for each column; editable before saving
- **Replace vs Append** – Replace overwrites existing rows; Append adds new rows to them
- **Typed Columns** – Each column's data type (String, DateTime, Int64, etc.) for correct filtering and aggregation

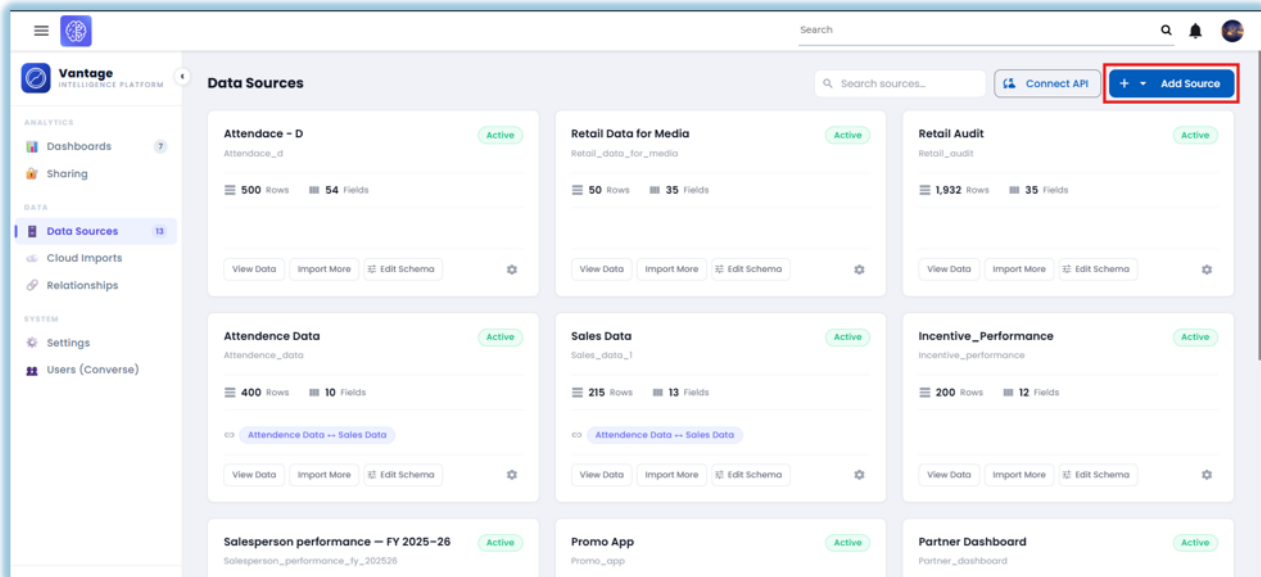
## Set Up Guide

From the Home Page, click the **Vantage Dashboard** widget to open Vantage. If you have not added this widget yet, follow the [Custom Widget help doc](#) to set it up.

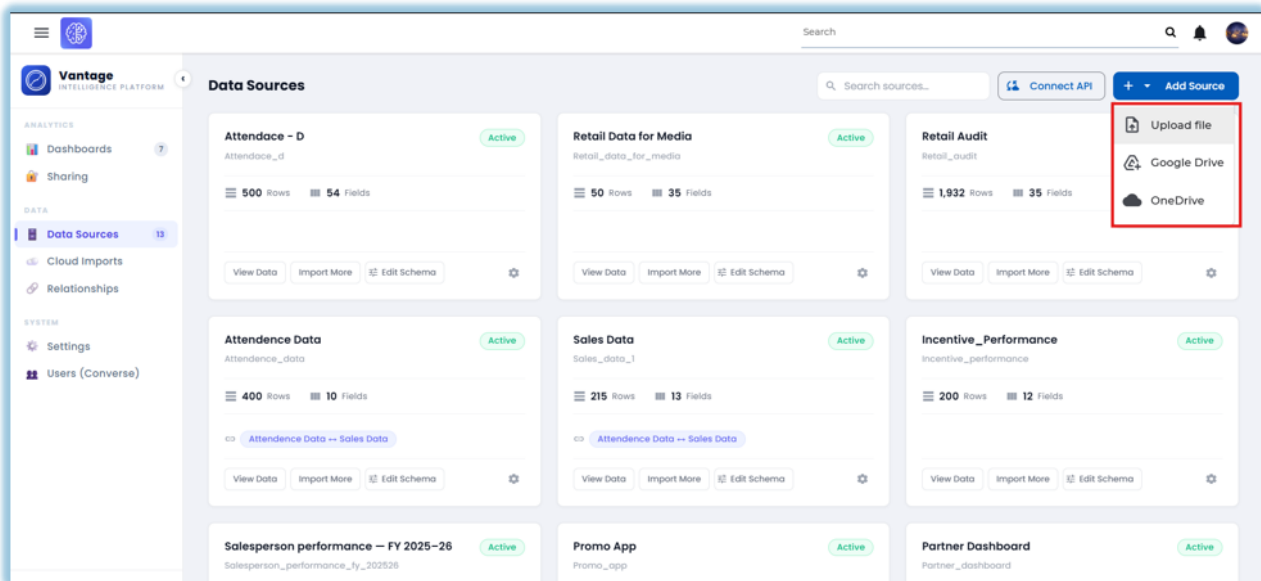
## 1. Go to **Data Sources**



## 2. Click **+ Add Source** → select **Excel / CSV**

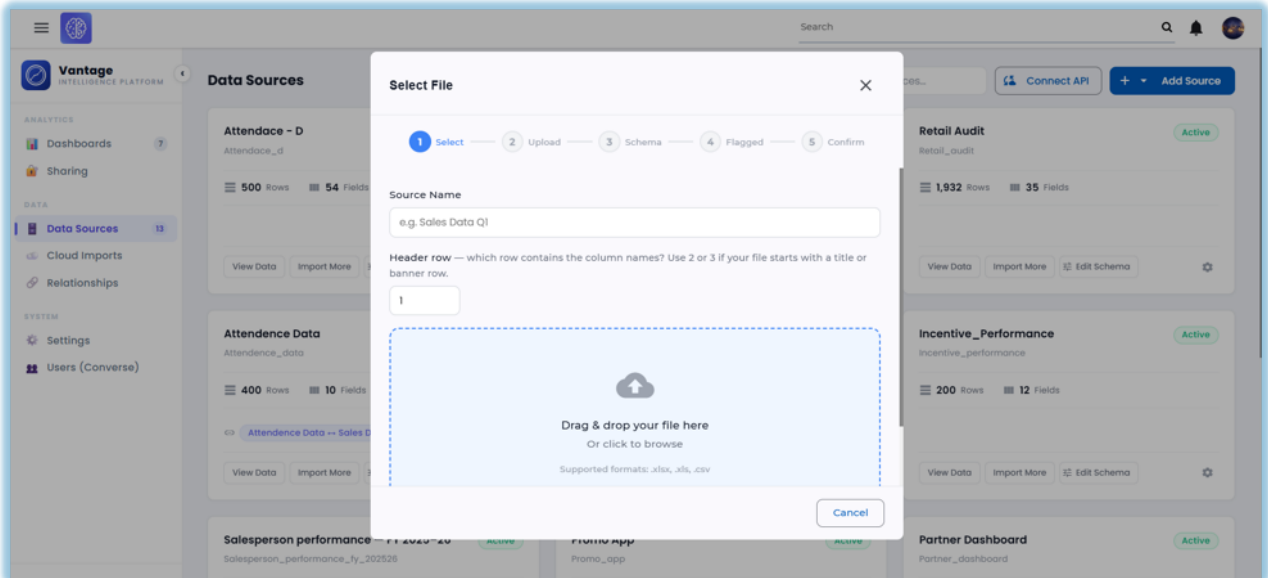


## 3. Choose your Source

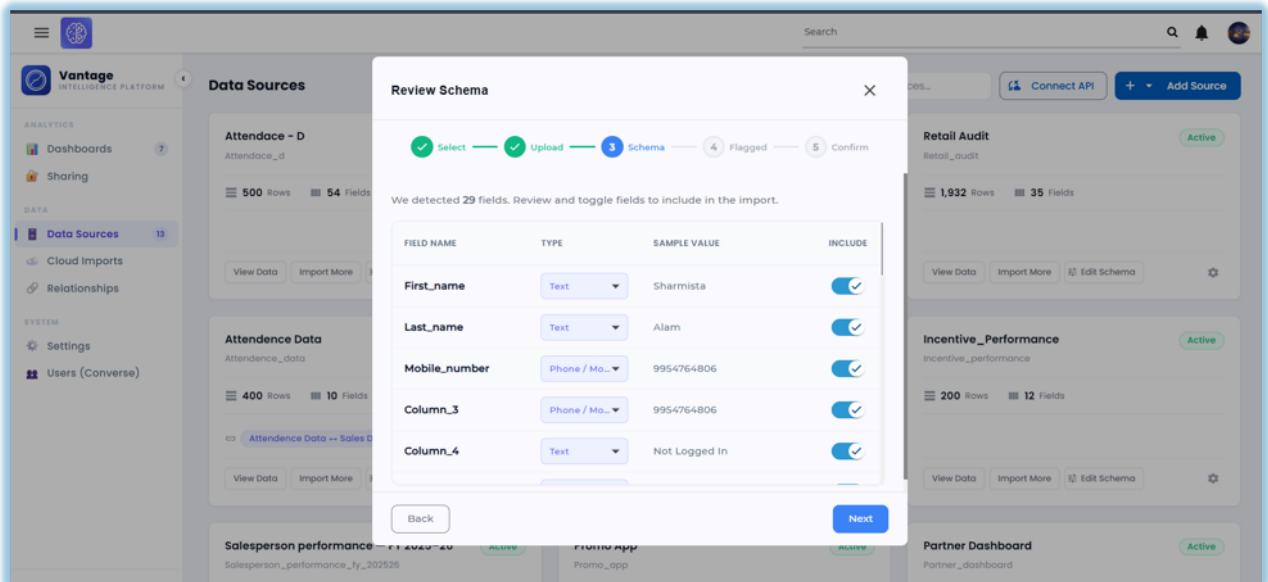


## 4. Name the data source

## 5. Choose your .xlsx or .csv file

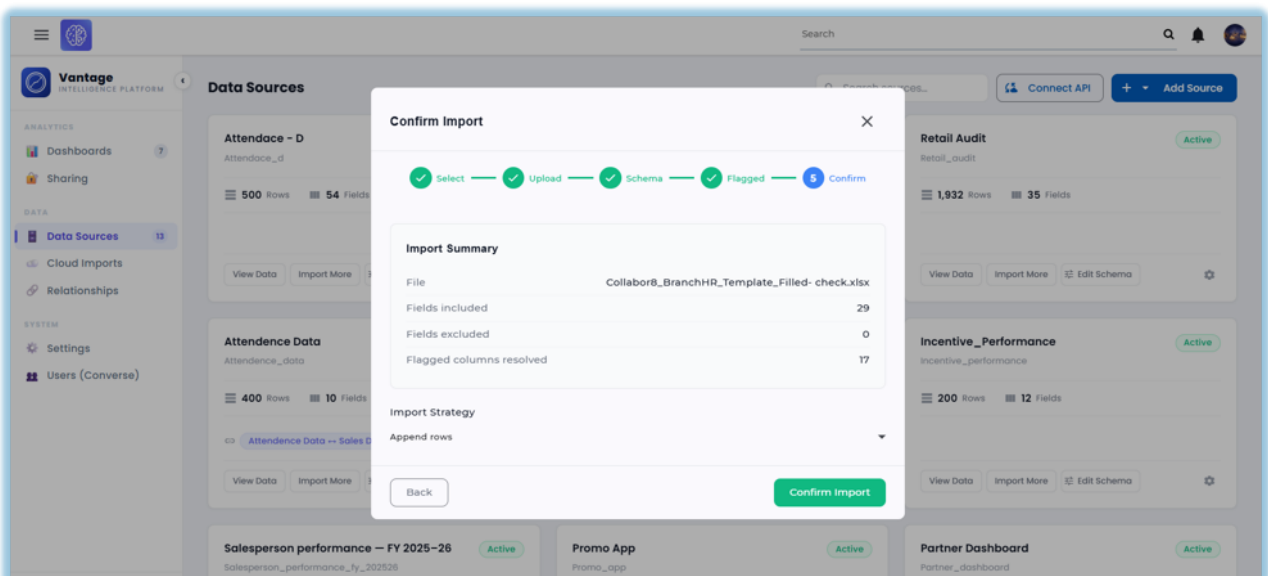


## 6. Review the column mapping



## 7. Click **Next** and **Review the Data**.

## 8. Click **Confirm Import**



# Best Practices

- Use a header row — Vantage names columns from it
- Remove blank rows and columns before uploading
- Keep dates in a consistent format
- Avoid merged cells in Excel files
- Re-upload and choose Replace to keep data current
- Use one sheet per file — Vantage reads the first sheet
- Keep file sizes manageable

## Related Links / FAQs

Related pages in this book:

- [How do I connect a REST API as a data source?](#)
- [How do I connect internal Converse forms as a data source?](#)
- [How do I view and edit data in a source?](#)
- [How do I create a relationship between data sources?](#)

### FAQs

#### **Can I upload more than one file?**

Yes, each file becomes its own data source.

#### **What file formats are supported?**

Excel (.xlsx) and CSV (.csv).

#### **Can I update the data after uploading?**

Yes — re-upload and choose Replace or Append.

#### **What if my column names change between uploads?**

Vantage may create new columns; keep names consistent.

## Version Notes

Last Updated: Oct 2026

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Revision #8

Created 4 September 2026 05:35:10 by Manjula Jagadish

Updated 15 October 2026 09:28:06 by Manjula Jagadish