Working with CSV file

What is a CSV file?

A Comma Separated Values (CSV) file is a plain text file that contains a list of data. These files are often used for exchanging data between different applications. It's a standard text format that does not require a specific application to open or manipulate it. The idea is that you can export complex data from one application to a CSV file, and then import the data in that CSV file into another application such as Claromentis or an external spreadsheet program for your own further analysis.

Working with CSV file

Most spreadsheet applications can open the CSV file but Microsoft Excel is known for automatically applying some formatting that may invalidate data back when it comes to re-import. Here is the most common problem.

1. Character encoding

Most modern web applications and databases are encoded in UTF-8 but Excel often uses default machine encoding such as Western Europe or CP-1252 depending on the regional settings. Learn more about character encoding.

2. Data Auto formatting

When it comes to the date or financial value, Excel is trying to be helpful and recognise these types and convert them, it may be useful for viewing but may not be the best when it comes to reimporting data back.

3. Inclusion of extra rows

When saving an Excel spreadsheet as a CSV we have seen instances where Excel recognises the true 'end' of the sheet as far larger than the actual dataset, which results in thousands or millions of empty rows being included in the export.

When this file is attempted to upload to Claromentis it fails as the file is far too big. To avoid this, when saving Excel content as a CSV first select and delete all the rows below the data range that you want. (use Shift^Ctrl^Down from the first row below your active data range, and then select Edit / Delete / Entire Row from the menu bar)

Note: You may also want to delete unused columns to the right of the active data range if they are empty to optimise the file.

Tips for working with CSV file

Generally, avoid Excel when it comes to manipulating data in CSV format unless your settings can be tweaked to ensure appropriate formatting consistently.
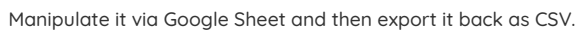
Here are some alternative tools we use which you may want to consider:

1. LibreOffice

https://www.libreoffice.org

LibreOffice is an open-source alternative to Microsoft Excel, you can download it free and it handles Character set and CSV import pretty well.

2. Google Drive

https://docs.google.com/

Did you know you can upload CSV to Google Drive,

Manipulate it via Google Sheet and then export it back as CSV.

3. Notepad or Notepad+

You can use a standard text editor to open a CSV file because it is simply just a text file, the problem is the data is not easy to read. Here is an example:

```
InfoCapture Issues - All Kind of Fields (6 September 2021) (Libre).csv    ×

1   id,id_in_project,short_string,medium_text,bbcode,checkbox,multiple_checkbox,radio
    _button,single_select,multiple_select,date,date_and_time,date_dropdown,select_use
    r_list,multiple_user_select,html_field,group,role,document_select,file_upload,lab
    el,signature_pad,financial_value_1,financial_value_2,creator-user-id,handler-user
    -id,status-code,date-of-report,input-delete
2   99339,A0001,Bobby,Some bob,[b] super bold [/b] or normal,1,v001,v001,v002,"v001,v
    002",20210904,20210904000000,20040502,1007,10071406,<strong>Some html field<
    /strong>,142,,24604,1802,,"Signed with text
    ""Michael""",35025,27056,1007,,,20210904073820,0
3   99342,A0002,Charlie,This is what charlie works,"or this is BBCode with image[
    url=""/intranet/common/metadata_file.php?id=1803&key=dbee01b31e5389b3""][
    img=""brigton-b.png""]/intranet/common/metadata_file.
    php?id=1803&key=dbee01b31e5389b3[/img]
4   brigton-b.png[/url]
    ",1,v002,v002,"v001,v004",20210908,0,20020102,1406,"1007,1406","<p><strong>
    Lorem ipsum dolor sit amet,</strong></p>
5
6   <p>consectetur adipiscing elit. Morbi et ullamcorper ex. Pellentesque a
    fringilla neque. Praesent semper vitae nulla sit amet interdum.</p>
7
8▾  <ul>
9       <li>Nunc feugiat scelerisque nulla vitae accumsan.</li>
10      <li>Proin suscipit venenatis tristique. Integer sed feugiat risus.</li>
11  </ul>
12
13  <p>Aenean nisi nibh, tempor vitae venenatis sit amet, porta eu tellus. Fusce
    maximus nisi id suscipit vestibulum. Donec vulputate massa quis felis suscipit
    pretium. Morbi nisi magna, accumsan convallis sollicitudin quis, dapibus et eros.
    Ut ac lorem feugiat, hendrerit leo eu, vestibulum velit. Proin tristique
    eleifend auctor.</p>",,,,0,,Signed with
    signature,22250,18012,1007,,,20210906074322,0
14
```

4. CSV Manipulating Apps

Here is list of dedicated apps that can help you working with CSV like a pro, sometimes they are also paid apps:

- Modern CSV
- Online CSV Editor and Viewer
- Tablecruncher (mac)

Last modified on 30 November 2023 by Hannah Door

Created on 6 September 2021 by Michael Christian

Tags: CSV, export, people, data, analysis, encoding, excel, import