



Dynamic Views v2.1

User Guide

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1 INTRODUCTION

Dynamic Views is a listing and reporting module that offers search capability and customized display from Dynamic Forms or any data source like a table, view or custom query.

Module Features:

- View can be based on a table, a Dynamic Forms Instance, or a custom SQL query.
- View / query or table can use an external database connection.
- WYSIWYG Editor for all columns for both an item and a detail view (similar to our Dynamic User Directory)
- Add both a filter against query and also a search
- Optionally enable MAXIMUM number of results to display
- Optionally enable 'No records displayed until search'
- Optionally modify search options such as button type (link/image), button location, and other search specific features.
- Optionally allow users to control the page size. The administrator can specify the page size location dropdownlist and also the page size available options.
- Optionally configure Detail View SEO parameters to include query/detail content within the page title, page keywords, and page description for each detailed record
- Setup reports and views with optional configuration options such as records per page, columns
- Unlimited Search Fields with many options for search validation, search textbox or combo, and many search criteria such as begins with, ends with, contains etc...
- Easy to user interface similar to all of our other components with familiar control panels

1.1 What's new in 2.1

1. **Now include custom style sheet per Dynamic Views instance** allowing you to easily modify styles and the layout within your views item and detail template
2. **Now include custom JavaScript file per Dynamic Views instance** – use this new feature to build more dynamic content when you are retrieving data; You could utilize this feature via jQuery/JavaScript calls to:
 - Utilize JavaScript alerts, functions, and plug ins within your template!
 - Hide/Show specific areas of your template per individual record/row along with other built in logic
 - Format items and tokens in your template
 - Any other jQuery or JavaScript routine!
3. **Now include initial JavaScript** that can be executed upon load time

2 INSTALLATION PROCEDURE

Included in your download are either one (If you only purchased the PA) or two (If you purchased the PA and Source Code) zip files. One zip file is the source code to the application, and the other zip file is the module which you can upload to your site.

When you extract the files, you will notice that it extracts two zip files (**note:** only one if you just purchased the PA).

- **DataSprings_DynamicViews_Module.zip** - file for installing “Dynamic Views” with your DNN
- **DataSprings_DynamicViews_Source.zip** - source zip file you can use in order to make any changes to the application (**note:** meant for advanced users)

In order to install your “Dynamic Views” module, login with an account to your DNN site as a host or administrator account. Once logged in, click Extensions.



Figure 1: Installation procedure (step 1/9)

The following screen will be displayed.

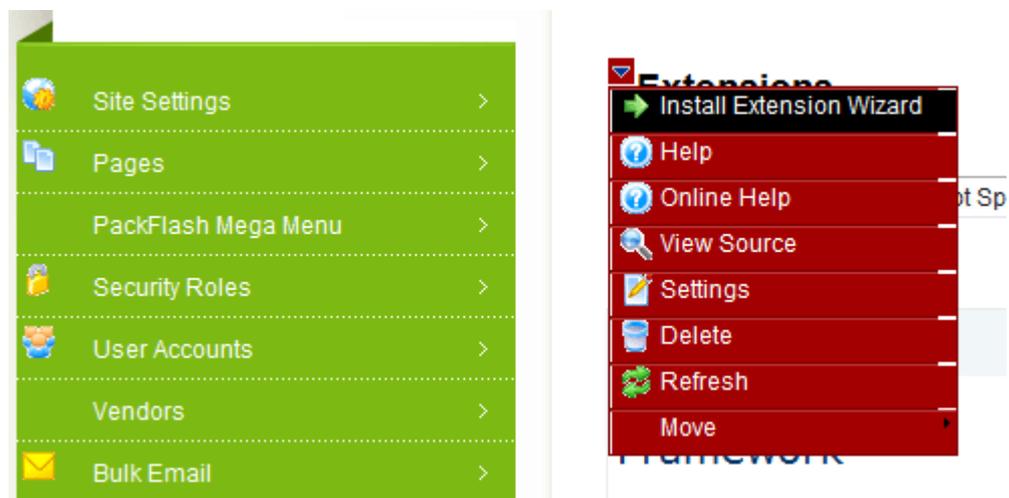


Figure 2: Installation procedure (step 2/9)

Choose option “Install Extension Wizard” from the “Extensions” main menu and the following screen will be displayed.

Upload New Extension Package

DotNetNuke can be extended in many ways. This wizard helps you upload and install Dc packages.

Use the Browse button to browse your local file system to find the extension package then click Next to continue.



➔ Next ⬅ Cancel

Figure 3: Installation procedure (step 3/9)

Click "Browse" and the dialog window for locating the installation file will be displayed.

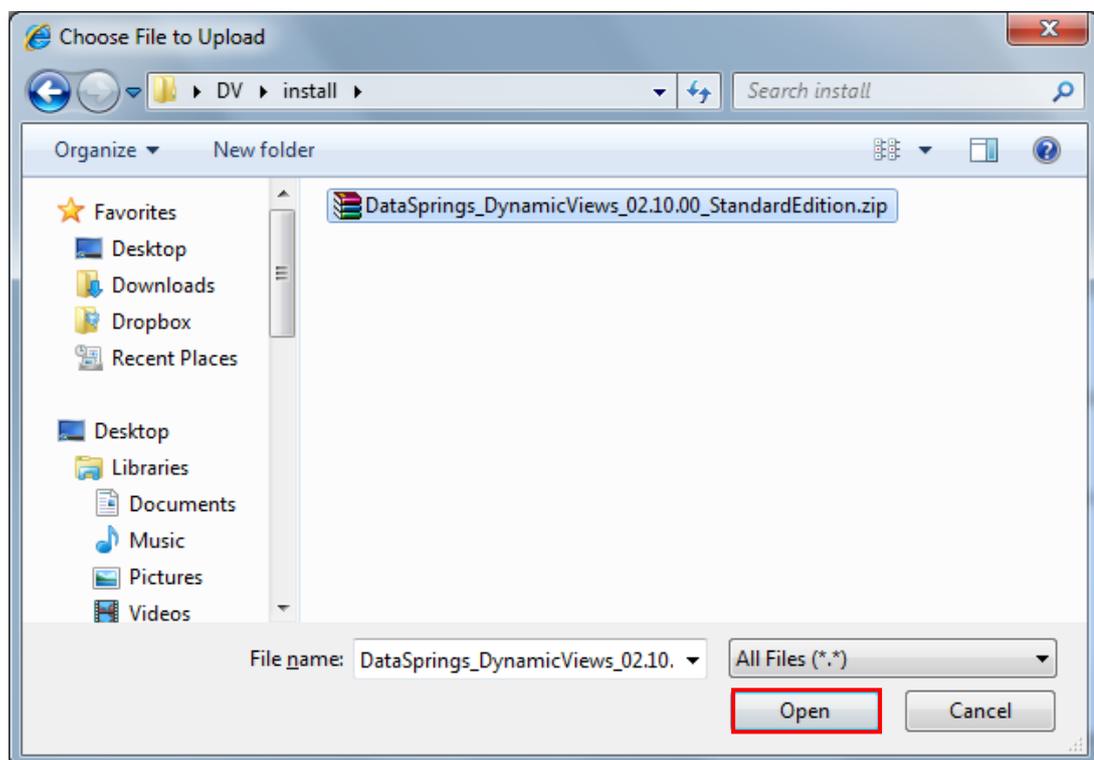


Figure 4: Installation procedure (step 4/9)

Locate the "**DataSprings_DynamicViews_02.10.00_StandardEdition.zip**" and click on the "Open" button. The following screen will be displayed.

Upload New Extension Package

DotNetNuke can be extended in many ways. This wizard helps you upload and install packages.

Use the Browse button to browse your local file system to find the extension package, then click Next to continue.

C:\Users\lgaza\Desktop\DV\install\DataSprings_Dynamic'



Figure 5: Installation procedure (step 5/9)

Click "Next" link and the following page will be displayed.

Package Information

The following information was found in the package manifest.

Name:	Dynamic Views
Type:	Module
Friendly Name:	Dynamic Views
Description:	Dynamic Views is a listing and reporting display of any data source from a table
Version:	2.10.1
Owner:	Data Springs, Inc
Organization:	Data Springs, Inc
Url:	www.datasprings.com
Email Address:	dnnsupport@datasprings.com



Figure 6: Installation procedure (step 6/9)

After reviewing the package information, click "Next" once again and the following page will be displayed.

Release Notes

You can review the Release Notes for this package.

-  **Release Notes:** Enhancements were added to the 2.1 release stylesheet and custom JavaScript file per the enhancements were added for performance.



Figure 7: Installation procedure (step 7/9)

Review the release notes and click “Next” to continue. The following page will be displayed.

Review License

Before proceeding you must accept the terms of the license for this extension. Please review the license and check the checkbox marked “Accept Terms”

-  **License:** **Data Springs Inc.**
DYNAMIC VIEWS / HTML LICENSE AGREEMENT PROVISIONS
- <3>Software License Agreement
1. This is an agreement between Licensor (Data Springs Inc.) and Licensee, who is being licensed to use the named Software (“Dynamic Views”).
 2. Licensee acknowledges that this is only a limited nonexclusive license. Licensor is and remains the owner of all titles, rights, and interests in the Software. Licensee may not sell, distribute, or package for sale named Software.
 3. This License permits Licensee to install the Software on one installation of



Figure 8: Installation procedure (step 8/9)

Review the license information, select the “Accept License” and click “Next” to continue and the installation will begin.

```
Info    Created - _ControlPanel.ascx
Info    Component installed successfully - File
Info    Installation committed
Info    Installation successful. - Dynamic Views
Info    Deleted temporary install folder
EndJob  Installation successful.
```

 **Return**

Figure 9: Installation procedure (step 9/9)

After a couple of moments the installation will be completed. The last line of text inform you on the status of the installation i.e. that the installation has been successful.

Note: please keep track of any errors that appear during the installation. These errors can be helpful if your module has problems.

3 ADDING DYNAMIC VIEWS MODULE TO A PAGE

In order to add “Dynamic Views” module to a desired page follow these steps:

1. Select the “Add New Module” radio button
2. Choose “Dynamic Views” from the “Module” pull down menu
3. Click on the “Add Module to Page” link (or plus icon .

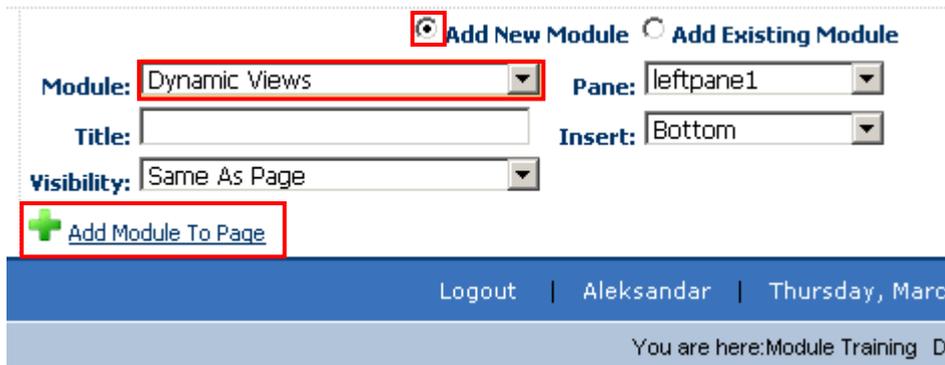


Figure 10: Adding a module to a page

The “Dynamic Views” module will be added to the page. Click on the arrow next to the title of the module in order to open the main menu.



Control Panel



2.1.0.20881 / 5.5.1



Welcome to the Data Springs Dynamic Views module, you have just taken your first step in setting up a custom view or report. Please refer to the user guide at www.datasprings.com for full installation and implementation instructions. To get started, we suggest that you setup initial settings within the module to define the Views template.

[Setup Initial Settings](#)

[Setup Template](#)

←— This product is not currently licensed. Please license this product by clicking here. —→

Figure 11: Opening the module main menu

Note: see section 4 for further information on main menu options.

4 DYNAMIC VIEWS MAIN MENU

This section of the document will describe the “Dynamic Views” main menu options. Click the arrow next to the title “Dynamic Views” to open the main menu.

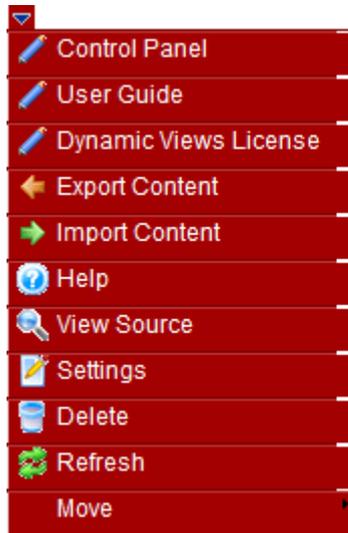


Figure 12: Opening the main menu

The following options are available inside this screen:

- **Control Panel** – the option for managing all main program options (see section 5)
 - **Note:** the main control panel options are also accessible via icons shown in the main module page – see the area denoted with the red rectangle in the image above
- **User Guide** – the option for accessing this guide
- **Dynamic Views License** – the option for entering the license (received in an email after purchasing the product) and registering the module
- **Export Content** - the option for exporting the content so it could be imported into another Dynamic Views module (see section 9)
- **Import Content** – the option for importing content from another Dynamic Views module (see section 9)
- **View Source** – default DotNetNuke function which allows you to view the HTML source of that component.
- **Settings** – option for managing the usual DNN module settings
- **Delete** – option for deleting a module (see section 10)
- **Move** – option for placing the module in the desired part of the page:
 - Move To leftpane
 - Move To bannerpane
 - Move To contentpane
 - Move To rightpane
 - Move To bottompane
 - Move To bottompane1
 - Move To bottompane2

- **Setup Initial Settings** – this is a shortcut to the option for managing the initial application settings (see section 5)
- **Setup Template** – option for managing the setup template (see section 7)

5 USING THE CONTROL PANEL

In order to start managing the main module options, choose “Control Panel” from the main menu.

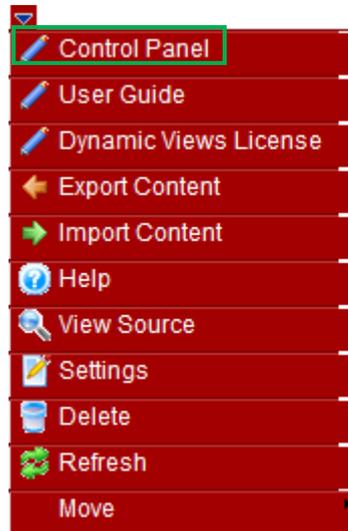


Figure 13: Using the control panel

The following page will be displayed.

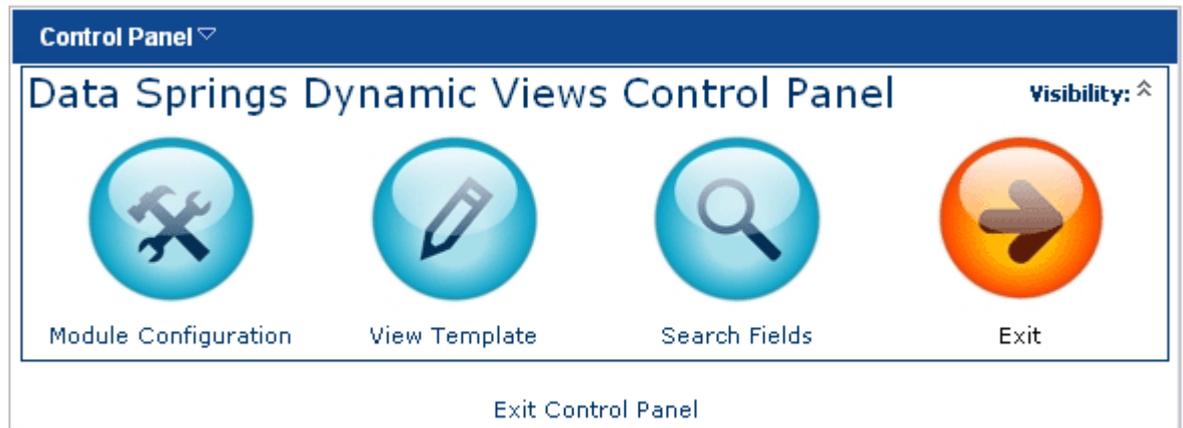


Figure 14: The options within the Dynamic Views control panel

The following options and parameters are available:

- **Module Configuration** – the option for configuring the module (see section 6)
- **View Template** – the option for managing the template (see section 7)
- **Search Fields** – the option for searching for the fields (see section 8)
- **Exit** – the option for closing the control panel

6 CONFIGURING THE MODULE

In order to start configuring the module, choose option “Control Panel” from the main menu and then select “Module Configuration”.

- ⊕ **Data Source Properties**
- ⊕ **General Settings**
- ⊕ **Page Size / Paging**
- ⊕ **Actions**
- ⊕ **Search**
- ⊕ **Detail View / SEO Settings**
- ⊕ **Filter**
- ⊕ **Style Sheet**
- ⊕ **Custom JavaScript File**

Figure 15: Configuring the module

The following options and parameters are available:

- **Data Source Properties** – see section 6.1
- **General Settings** – see section 6.2
- **Page Size/Paging** – see section 6.3
- **Actions** – see section 6.4
- **Search** – see section 6.5
- **Detail View / SEO Settings** – see section 6.6
- **Filter** – see section 6.7
- **Style Sheet** – see section 6.8
- **Custom JavaScript File** - see section 6.9

6.1 Managing the Data Source Properties

The “Dynamic Views” module allows each instance of the module to be setup with its own unique Data Source. The data source controls the specific data that is retrieved for both the item and the detailed display listings.

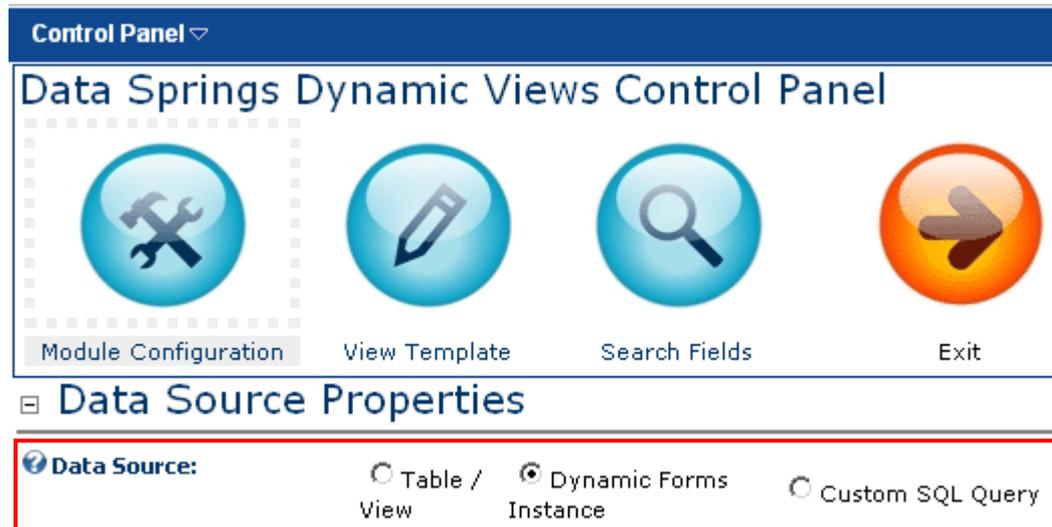


Figure 16: Managing the Data Source Properties

The following options are available:

- **Table/View** – see section 6.1.1
- **Dynamic Forms Instance** - see section 6.1.2
- **Custom SQL Query** – see section 6.1.3
- **External Connection** - If this table or query is on a separate database, enter the name of that connection string here.
 - **Note:** If you do not choose the free form query option, then you must be running SQL Server on the external connection and you must create a stored procedure that the module uses. Please refer to the blog post for more information. <https://www.datasprings.com/news/blog/postid/22>
- **Generate Column Names** – clicking this option will automatically create columns based on the fields available from the table/view, Dynamic Forms Instance, or SQL Query.
 - Note: Please see the underlined tip below... It is recommended that you generate columns so that you do not have to add them individually for your view or query.
- **Clear/Delete All Columns** – click this option to delete all defined columns
- **Available Columns** – this part of the page displays the available columns; the following options are available
 - **X** - to **delete the column** click this icon next to the desired column
 - **+** - to **add a new column**, enter the name of the column and click this icon

Important Tip: This step is critical for the module to function properly. You do not have to generate columns automatically; however only columns that exist will be available for features such as the item/detail template, search fields, filter fields, sort fields, etc.

6.1.1 Using Table/View as a data source

In order to view “Table/View” option as a data source, click this radio button under “Data Source”.

Data Source: Table / View Dynamic Forms Instance Custom SQL Query

Table / View Name:

External Connection:

[Generate Column Names](#) [Clear / Delete All Columns](#)

Available Columns:

Column Name	Sort Order		Exportable
UniqueID	↑ ↓	×	☑
UserID	↑ ↓	×	☑
first name:	↑ ↓	×	☑
last name:	↑ ↓	×	☑
email address:	↑ ↓	×	☑
company name:	↑ ↓	×	☑
phone:	↑ ↓	×	☑
do you require a new design, redesign or minor updates?	↑ ↓	×	☑
if new design, please select which type of site would best describe what you are in need of:	↑ ↓	×	☑
will you need a domain name registered for your website?	↑ ↓	×	☑
please provide your existing website(s)	↑ ↓	×	☑
briefly describe what services and/or products you or your organization provides	↑ ↓	×	☑
what is your projected budget for this project?	↑ ↓	×	☑
do you know approximately how many pages you will need developed for your website?	↑ ↓	×	☑
if you have any additional comments that you feel may be important, please enter them here.	↑ ↓	×	☑
how did you hear about data springs?	↑ ↓	×	☑
hidden field	↑ ↓	×	☑
		+	

Figure 17: Using Table/View

Enter the table name or a view name from your database. For example, you could enter 'Portals' to setup the portals name as your table name.

This is useful if you have a flat table already created that you know you want to query against. When selecting this option you should select the primary key for this table as the detail view/primary key.

Once you have entered the table/view name, click **Generate Column Names** to generate the columns based on the table/view as data source.

6.1.2 Using the Dynamic Forms Instance

In order to select the Dynamic Forms Instance as a data source, select that radio button within the “Data source properties” page.

Data Source: Table / View **Dynamic Forms Instance** Custom SQL Query

Table / View

Name:

External Connection:

[Generate Column Names](#) [Clear / Delete All Columns](#)

Available Columns:

Column Name	Sort Order		Exportable
UniqueID	↑ ↓	×	☒
UserID	↑ ↓	×	☒
first name:	↑ ↓	×	☒
last name:	↑ ↓	×	☒
email address:	↑ ↓	×	☒
company name:	↑ ↓	×	☒
phone:	↑ ↓	×	☒
do you require a new design, redesign or minor updates?	↑ ↓	×	☒
if new design, please select which type of site would best describe what you are in need of:	↑ ↓	×	☒
will you need a domain name registered for your website?	↑ ↓	×	☒
please provide your existing website(s)	↑ ↓	×	☒
briefly describe what services and/or products you or your organization provides	↑ ↓	×	☒
what is your projected budget for this project?	↑ ↓	×	☒
do you know approximately how many pages you will need developed for your website?	↑ ↓	×	☒
if you have any additional comments that you feel may be important, please enter them here.	↑ ↓	×	☒
how did you hear about data springs?	↑ ↓	×	☒
hidden field	↑ ↓	×	☒
<input type="text"/>		+	

Figure 18: Dynamic Forms Instance

The following options and parameters are available:

- **Dynamic Forms Instance** – choose the desired Dynamic Forms instance from this pull down menu; you can select a Dynamic Forms instance from within your portal to query against records and results from within that modules instance. The form instance will generate column names for you based on the question label. Each question within the form will have its own unique column. When selecting this option you should select 'UniqueCompletionID' as the detail view/primary key
 - **Note:** Dynamic Forms is a separate module from Data Springs; for more information you can visit the product page at <http://www.datasprings.com/DynamicForms>

- **Limits results by UserID?** - if marked, only form submissions by the specific logged in user will be displayed.
 - **Example:** If a user with the ID 400 submitted 3 submissions for the specific module instance that is setup, then only those 3 submissions would be displayed within the Dynamic Views results template.

Once you have selected the desired instance, click **Generate Column Names** to generate the columns based on the Dynamic Forms instance as data source.

6.1.3 Using the Custom SQL Query

In order to use a custom SQL query as a data source, select that radio button within the “Data source properties” page.

The screenshot shows the 'Data Source Properties' configuration page. Under the 'Data Source:' section, three radio buttons are present: 'Table / View', 'Dynamic Forms Instance', and 'Custom SQL Query'. The 'Custom SQL Query' radio button is selected and highlighted with a red box. Below this, the 'SQL Query:' label is followed by a large, empty text area for entering the query. Further down, the 'Allow Free Form Query:' checkbox is unchecked. Below that, the 'External Connection:' label is followed by an empty text area. At the bottom, there are two buttons: 'Generate Column Names' (highlighted with a red box) and 'Clear / Delete All Columns'.

Figure 19: Using a custom SQL query as a data source

This option is meant for advanced users. You can use it to enter the exact query you want to utilize for this Dynamic View.

For example, 'Select * from Portals' would render all of the columns for that specific column. You can always test your SQL query by navigating to host/SQL.

If your query works there, it should also work here. You can also reference specific tokens for your query such as:

- \$(PortalID)
- \$(TabID)
- \$(ModuleID)
- \$(CurrentURL)
- \$(URLReferrer)
- \$(UserID)
- \$(IPAddress)
- \$(CurrentLanguage)

The following other options and parameters are available:

- **Allow Free Query** – Since we allow the External Connection ex: connect to mysql, oracle databases etc.. the allow free form query allows the user to not have to use stored procedures or TSQL, they can be connected to the external database and use the exact

query language for that database. In order to get any search fields to work you will need to use the newly added \$(Search) token which would be placed into your custom SQL query like so: Select column from table where column = '\$(SearchToken)' AND column = '\$(SearchToken_Condition)'

Note: The following functionality is disabled when free form query is enabled:

- 1.) Standard Search Filtering
 - 2.) Filtered fields defined in the Module Configuration settings under the Filter expandable menu
 - 3.) Sort Field
 - 4.) Sort Order
 - 5.) Maximum number of results rendered before search/Filter
- **External Connection** - if this table or query is on a separate database, enter the name of that connection string here.

Note: If you are having troubles implementing Dynamic Views via an external connection string or using the free form SQL method then please refer to this blog post with some troubleshooting tips:

<https://www.datasprings.com/news/blog/postid/22>

Once you have specified the SQL query, click **Generate Column Names** to generate the columns based on that query as data source.

6.2 Managing the General Settings

In order to start managing the general settings, choose option “Module Configuration” and then expand the “General Settings” option.

General Settings

- Records per Page:**
- Repeat Columns:**
- Repeat Direction:**
- Detail View Primary Key:**
- Sort Field:**
- Sorting Order:**
- Enable Export to Excel:**
 - Administrators
 - Candee's Test Users
 - Data Springs Blog Poster
 - Demo_Annual
 - Demo_Free
 - Demo_Monthly
 - DNN Skins
- Enable Export to PDF:**
 - Administrators
 - Candee's Test Users
 - Data Springs Blog Poster
 - Demo_Annual
 - Demo_Free
 - Demo_Monthly
 - DNN Skins

Figure 20: Managing the General Settings

The following options and parameters are available:

- **Records per page** – enter the number of records you want to display per page (e.g. 10); if there are 30 records, those will be displayed in 3 separate pages
- **Repeat Columns** – set the number of columns you would like to repeat horizontally
 - **For example:** 3 columns would be
Name: Smith, John Name: Smith, John Name: Smith, John
- **Repeat Direction** – choose the desired direction for repeating information (horizontal or vertical)
- **Detail View Primary Key** - select the primary key for this query to place the module in detail mode; when in detail mode the key will check the value and filter the data for this specific record; this should normally be the primary key for the table or the [UniqueCompletionID] for Dynamic Forms
- **Sort Field** – choose the item view column will be sorted by (e.g. “[First Name]”)
- **Sorting Order** – set the desired sorting order (ascending or descending)

- **Enable Export to Excel** - select security roles which will be allowed to export the results to a CSV file
- **Enable Export to PDF** - select security roles which will be allowed to export the results to PDF format

6.3 Setting the Page Size/Paging

In order to set the page size and/or paging, choose option “Module Configuration” and then expand the “Page Size/Paging” option.

Page Size / Paging

- Paging Link Locations:** Top
- Pager Alignment:** Left
- Results Count?:** Display a message to the user with the total number of results rendered?
- User controlled page size?:** Allow the user to select the number of records per page?
- Page size control location?:** Left
- Select the paging control type.**
The paging control can either be page numbers or previous and next hyperlinks.:
 Page Numbers Previous / Next Links
- Please choose whether you would like to use link buttons or hyperlinks.:**
 Link Button Hyperlink
- Page size options (comma separate list):** 10, 20, 50, 100, 250, 500, 1000

Figure 21: Setting the Page Size/Paging

The following options are available:

- **Paging Link Locations** - select the location for the page numbers links; you can choose to either display them in the top part of the page, the bottom or both
- **Pager Alignment** – set the desired alignment for the pager
- **Results Count** – select this option if you would like to display a message to the user with the total number of rendered results
- **User controlled page size** - select this option in case you want to allow your users to change the page size in terms of the number of records per page
 - **Note:** this will result in displaying a dropdown list of available page size options such as 10, 25, 50, 100, 250, 500, etc...
- **Page size control location** – use this option to select the location of the page size control as seen by the users; this option can be set to be left, center, or right aligned
- **Select the paging control type**
 - **Page Numbers** – select this option to use page numbers as a control for moving through the pages
 - **Previous/Next Links** – select this option to use previous/next links as a control for moving through the pages
- **Please choose whether you would like to use link buttons or hyperlinks** – use this option to display either link button or hyperlinks as a control for moving through the pages
- **Page size options (comma separate list)** - enter the options the user will use to select the page size (e.g.: 10, 25, 50, 100, 250, 500, 1000)

6.4 Managing the Actions

The “Action” section within “Module Configuration” allows you to create commands and functionality by building unique SQL actions against your data records to manipulate the data.

Examples:

- the action can be used in case you want to add a “Delete This Record” button to your template
- it can also be used to mark the record as “Paid” or add a role

In order to start managing the actions, choose option “Module Configuration” and then expand the “Action” option.

Actions

Link Button
 Image Button

Custom Image Button:

File Location:

File Name:

[Upload New File](#)

Action Link Text:

SQL Query:

[Save Action](#) [Delete Action](#)

Figure 22: Managing the actions

The following options and parameters are available:

- **Creating a new action** – see section 6.4.1
- **Editing an action** – see section 6.4.2
- **Deleting an action** – see section 6.4.3

6.4.1 Creating a new action

In order to create a new action, choose that option from the “Select Action” menu.

The screenshot shows the 'Actions' configuration panel. The 'Select Action' dropdown menu is highlighted with a red box and contains the text 'New Action'. Below it, the 'Action Name' field contains 'Deleting the record', 'Short Name' contains 'delrec', and 'Sort Order' contains '1'. The 'Action Type' section has two radio buttons: 'Link Button' (selected) and 'Image Button'. The 'Custom Image Button' section includes a 'File Location' dropdown set to 'Root', a 'File Name' dropdown set to '_aaa111.xml', and a link labeled 'Upload New File'. The 'Action Link Text' field contains 'Delete This Record'. The 'SQL Query' field is empty. At the bottom of the form is a 'Save Action' button.

Figure 23: Creating a new action

The following options and parameters are available:

- **Action Name** – enter the name of the action so you could be able to differentiate it from all other actions in the back end
- **Short Name** – enter the short name for this action
- **Sort Order** – set the desired sort order for this action
- **Action Type** – choose the action type i.e. if this action will be initiated by a text link or an image button
- **Custom Image Button** – specify the image which will be used for an image button in case you're using that option
- **Action Link Text** – specify the text for the link in case you wish to use that option
- **SQL Query** – enter the SQL query which will be performed by this action. The SQL query that you provide in this field will be executed when the action Link Button or action hyperlink is clicked in your template. Ex: if I place this into the SQL Query: *DELETE FROM tableName WHERE tablePrimaryKey = '\${PrimaryKey}'* this will delete the record in which you clicked the hyperlink/Link Button.

After setting the desired values, click the “Save Action” link to complete the procedure of creating a new action.

6.4.2 Editing an action

To edit an action you will need to select it from the “Select Action” drop down list, then make any changes you would like. Then click the Link Button “Update Action” and any changes will be saved to that action.

6.4.3 Deleting an action

To delete an action all you will need to do is select an action from the “Select Action” drop down list, then you will find a link to the right of “Update Action”. When you click “Delete Action” the action will be deleted and removed from your drop down list.

6.5 Configuring the Search options

In order to start configuring the search options, choose option “Module Configuration” and then expand the “Search” option.

Search

Initialize No Records:

Display No Records Until Search

Maximum number of results rendered before Search/Filter (0 for no limit)?:

Search Alignment: Left Right

Search Activation: Search Link Text Use Search Custom Image Button

Custom Image Button:

File Location:

File Name:

[Upload New File](#)

Hide Search Conditions:

Search Link Text:

Search Label Suffix:

Enable Validation Summary:

Search Javascript on Blur:

Figure 24: Configuring the Search options

The following parameters are available:

- **Initialize No Records** – use this option to hide any results until the user conducts a search
- **Maximum number of results rendered before Search/Filter (0 for no limit)** - see section 6.5.1
- **Search Alignment** – the option for setting the desired search alignment (see section 6.5.2)
- **Search Activation** - choose if the search button should be a link button or image button.

- **Custom Image Button** - choose this option if you want your users to start the search by clicking on the image (**note:** after selecting this option use the “**Custom Image Button**” option to specify the desired image)
- **Hide Search Conditions** – select this checkbox if you would like to hide the search conditions dropdown lists when searching
- **Search Link Text** – choose this option if you want your users to start the search by clicking on the text link (**note:** after selecting this option use the “**Search Link Text**” input field to specify the link text e.g. “**Search**”)
- **Search Label Suffix** - type in the search text suffix (e.g. a colon symbol)
- **Enable Validation Summary** – select this option if you want to display the validation summary
- **Search JavaScript on Blur** – use this field to specify your custom javascript function

6.5.1 Maximum number of results rendered before Search/Filter

The purpose of this functionality is to increase the system performance in case of a large queries by forcing users to enter criteria before displaying the results.

Search

<input checked="" type="checkbox"/> Initialize No Records:	<input type="checkbox"/> Display No Records Until Search
<input checked="" type="checkbox"/> Maximum number of results rendered before Search/Filter (0 for no limit)?:	<input type="text" value="300"/>
<input checked="" type="checkbox"/> Search Alignment:	<input checked="" type="radio"/> Left <input type="radio"/> Right
<input checked="" type="checkbox"/> Search Activation:	<input checked="" type="radio"/> Search Link Text <input type="radio"/> Use Search Custom Image Button
<input checked="" type="checkbox"/> Custom Image Button:	File Location: <input type="text" value="Root"/> File Name: <input type="text" value="010.jpg"/> Upload New File
<input checked="" type="checkbox"/> Hide Search Conditions:	<input type="checkbox"/>
<input checked="" type="checkbox"/> Search Link Text:	<input type="text" value="Search"/>
<input checked="" type="checkbox"/> Search Label Suffix:	<input type="text" value=":"/>
<input checked="" type="checkbox"/> Enable Validation Summary:	<input type="checkbox"/>
<input checked="" type="checkbox"/> Search Javascript on Blur:	<input type="text"/>

Figure 25: Setting the maximum number of results

In other words, you can use this option to determine the exact number of records you wish to display without any input from the user. In case they wish to see more/other records they will need to use the pull down menus to define the criteria.

Note: For large queries and tables you should always consider enabling this feature for performance reasons. If you have a query that might return 100,000 rows then this will limit not only the records to display but also the query execution time when you are only pulling in the top number of records until the user begins their search.

Figure 26: Pull down menu for defining the desired criteria

Note: enter 0 if you wish to display all available records without forcing the user to define the criteria.

6.5.2 Setting the alignment of the “Search” option

In order to set the alignment of the “Search” option (either the custom button or the link), select the desired value within the “Search Alignment”:

- **Left** – see Figure 28
- **Right** – see Figure 29

Figure 27: Setting the alignment of the search option

The screenshot below demonstrates the layout of the Dynamic Views when the alignment is set to left.

Figure 28: The layout when the alignment set to left

The screenshot below demonstrates the layout of the Dynamic Views when the alignment is set to right.

The screenshot shows a blue header bar with the text "Dynamic Views" and a downward arrow. Below the header, there are two search filters. The first filter is labeled "First Name" and has a dropdown menu set to "contains" followed by an empty text input field. The second filter is labeled "Country" and has a dropdown menu set to "contains" followed by a dropdown menu set to "- Select Country -". Below these filters is a red-bordered button labeled "Search".

Figure 29: The layout when the alignment set to right

6.6 Managing the Detail View/SEO Settings

The “Detail View/Seo Settings” will help you manage the SEO aspect of the page with view details. This feature allows you to create unique and individual pages when search engines view the URL. The meta tags and HTML properties are changes to reflect alternate page titles, alternate keywords, and page description.

The screenshot shows a section titled "Detail View / SEO Settings" with a blue icon of a document. Below the title, there are three input fields, each with a blue circular icon containing a document symbol. The first field is labeled "Alternate page title (can include tokens):" and has a single-line text input. The second field is labeled "Alternate page description (can include tokens):" and has a multi-line text input. The third field is labeled "Alternate page keywords (can include tokens):" and has a multi-line text input.

Figure 30: Managing the SEO settings

The following options and parameters are available:

- **Alternate page title (can include tokens)** – use this field to specify the desired tokens which you wish to include in the title of the page i.e. [FirstName] to display the first name column or any other view column parameter available.
- **Alternate page description (can include tokens)** - select the alternate page description for the detailed view; the page description can include tokens such as [FirstName] column or any other view column parameter available.
- **Alternate page keywords (can include tokens)**- select the alternate page keywords for the detailed view; the page description can include tokens such as [FirstName] column or any other view column parameter available.

6.7 Setting up the Filter

A filter is an admin-defined search criteria designed to limit the search results. For example, if you offer a list of personal trainers but only want to display those who completed your evaluation process, you can set up a view column for this and use it as a filter.

In order to start setting the filter, choose option “Module Configuration” and then expand the “Filter” option.

Filter

Debug Mode: Enable Debug Mode

Enable Alphabetical Filter: Enable Alphabetical Filter?

Alphabetical Filter Field:

Filter data (Optional):

-- Select Column -- equals

[Add](#) [Delete](#) [Validate](#)

[Save](#)

Figure 31: Setting the filter

The following options and parameters are available:

- **Debug Mode** – enable this option if you want to eliminate problems by viewing information on what went wrong
- **Enable Alphabetical Filter** - select this option to enable the alphabetical filter; the filter will only filter results and listings where the filter field type starts with the specified letter
- **Alphabetical Filter Field** - select the view column / field which should represent the alphabetical search field filter. For example, select FirstName if you would like to be able to select a letter and display results where the first name begins with that letter
- **Filter data (Optional)** – define pre-set search criteria here to limit search results

6.8 Managing the Style Sheet

The Dynamic Views module allows you to define a custom Style sheet per Dynamic Views instance which allows you to easily modify styles and the layout within your views item and detail template.

In order to start modifying the style sheet, choose **Module Configuration** from the **Control panel** and then expand the **Style Sheet** part of the page.

Style Sheet

Dynamic Views allows you to use both the standard DotNetNuke styles for your form or a custom Dynarn custom style sheet you will be able to work from a default style sheet template and modify style classes

```
/* DATA SPRINGS Inc. - DYNAMIC VIEWS STYLE SHEET */

.DynamicViews_HeaderTable {
    width: 100%;
    padding: 2px;
}

.DynamicViews_MainTable {
    width: 100%;
    padding: 2px;
}

.DynamicViews_LabelError
{
```

[Update Style Sheet](#)

Figure 32: Managing the style sheet

Define the style sheet classes within this field and click **Update Style Sheet** to save the changes.

Note: you can define a different Style Sheet for each of the module instances.

6.9 Setting up a Custom JavaScript File

The Dynamic Views module allows you to include a custom JavaScript file per Dynamic Views instance. This feature allows you to build more dynamic content when retrieving data.

For example, you can use this feature via jQuery/JavaScript calls to:

- Utilize JavaScript alerts, functions, and plug ins within your template
- Hide/Show specific areas of your template per individual record/row along with other built in logic
- Format items and tokens in your template
- Any other jQuery or JavaScript routine!

In order to start modifying the JavaScript file, choose **Module Configuration** from the **Control panel** and then expand the **Custom JavaScript File** part of the page.

Custom JavaScript File

JavaScript can be used throughout your Dynamic Views implementation. For JavaScript you would use the Initial JavaScript property (or the Initial JavaScript property on a postback) you can enter JavaScript within the Initial JavaScript property. The JavaScript file is used for custom JavaScript functions that have already been included within the application but if you need to include your own you can use the JavaScript File property. The JavaScript File property is used directly with client side events property within each field under advanced field settings. Please see the JavaScript File property for more information.

 Initial JavaScript:

 JavaScript File:

```

/*****
* Data Springs Custom Javascript File for Dynamic Views
* Insert any custom client side javascript functions to be rendered for Dynamic Views
* for demonstrations of Dynamic Forms please visit: http://www.datasprings.com
*****/

/*****
* This function call is used to show and hide specific HTML elements (such as DIV's etc...)
*****/

function hidehtml(pass) {

var divs = document.getElementsByTagName("div");

for(i=0;i<divs.length;i++){

```

[Update JavaScript File](#)

Figure 33: Setting up a Custom JavaScript File

The following options and parameters are available:

- **Initial JavaScript** – enter the initial JavaScript which will be executed when the initial form loads or when a post back occurs.
- **JavaScript File** - enter any custom JavaScript functions into the JavaScript file for this Dynamic Forms instance.

After setting the desired parameters, click **Update JavaScript File** to save the changes.

7 MANAGING THE TEMPLATE

In order to start managing the template, choose option “View Template” inside the control panel.

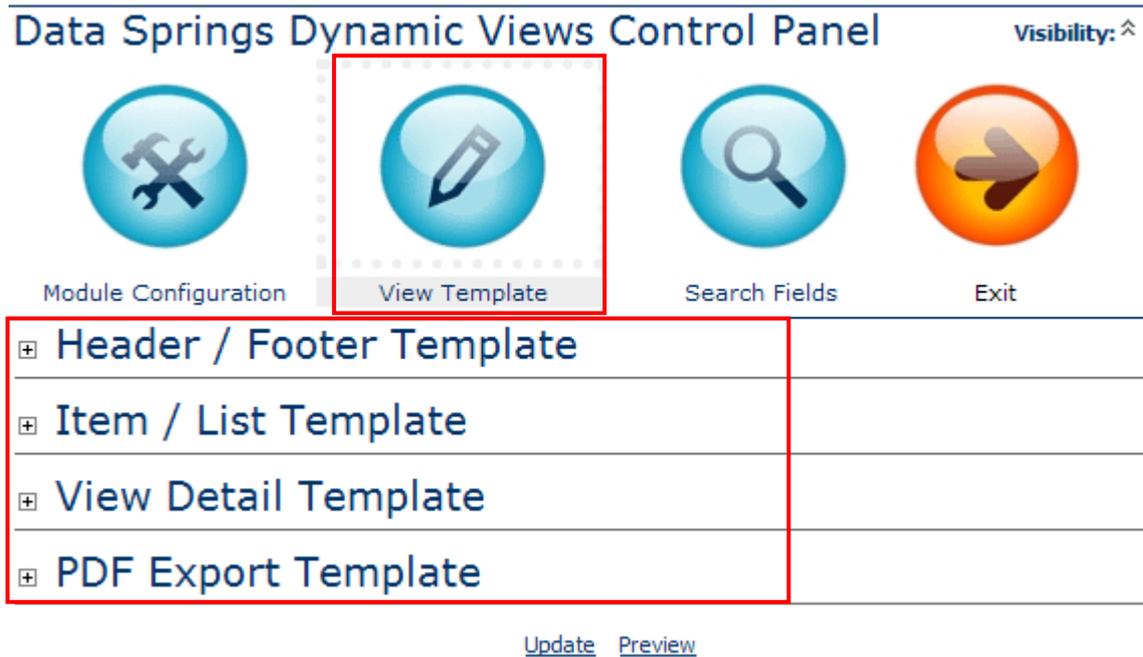


Figure 34: Managing the View Template

The following options and parameters are available:

- **Header/Footer Template** – the option for setting up the header and footer of the template (see section 7.1)
- **Item/List Template** – the option for setting up a main View Template (see section 7.2)
- **View Detail Template** – the option for setting up the template with detailed view information (see section 7.3)
- **PDF Export Template** – the option for setting the PDF export template (see section 7.4)

7.1 Setting the Header/Footer Template

In order to start setting the footer and header parts of the template, choose option “View Template” and then expand the “Header/Footer Template” option.

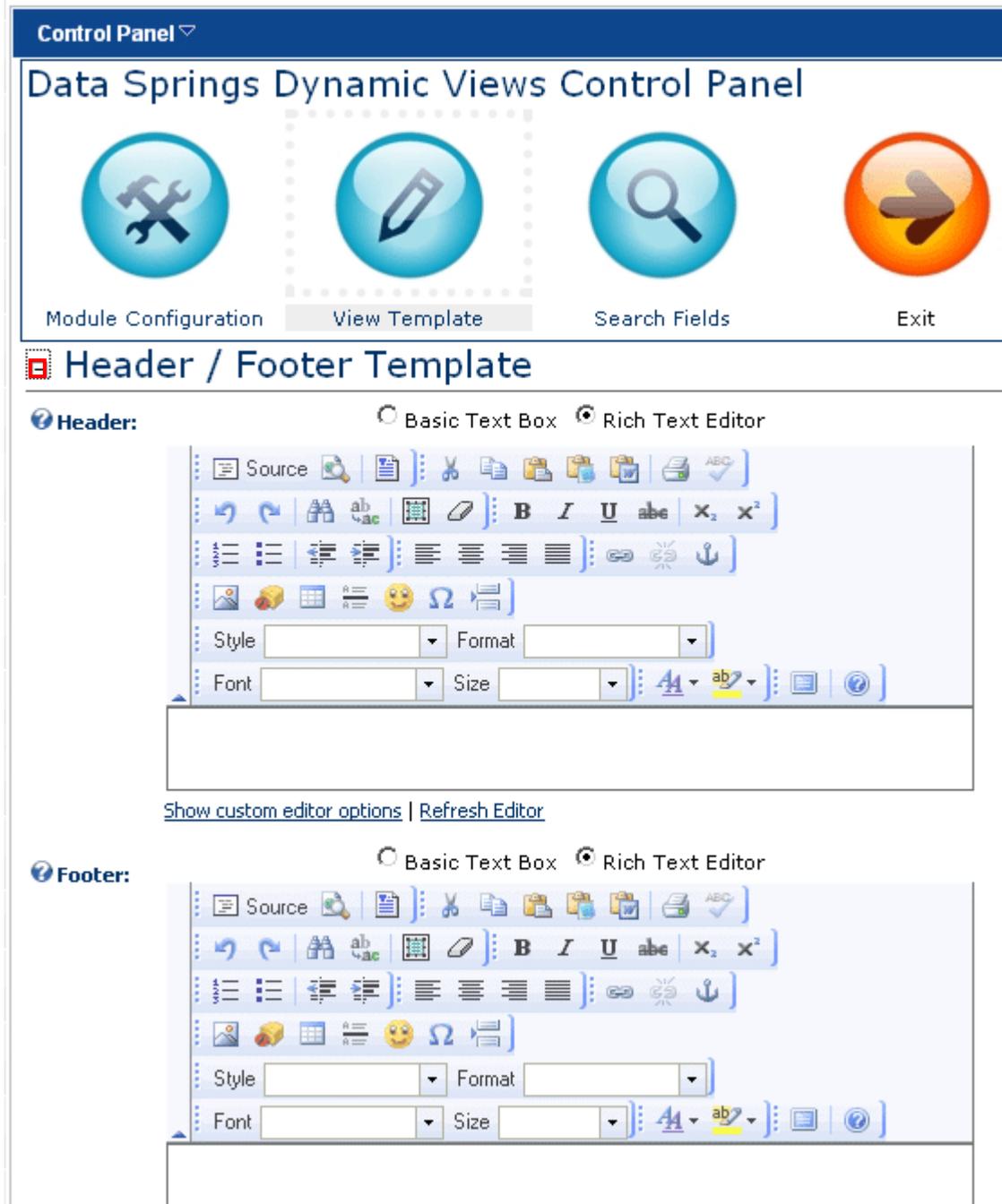


Figure 35: Setting the Header/Footer Template

The following options are available:

- **Header** – the WYSIWYG editor for entering and formatting the text which will be displayed as a header of the module
- **Footer** – the WYSIWYG editor for entering and formatting the text which will be displayed as a footer of the module

Note: the **header** part of the screen can be used for defining introductory information for your users and to explain the purpose of the view or report while the **footer** can be used for providing any additional information about the company or contact information.

7.2 Setting the Item/List Template

In order to start setting the item/list template, choose option “View Template” and then expand the “Item/List Template” option.

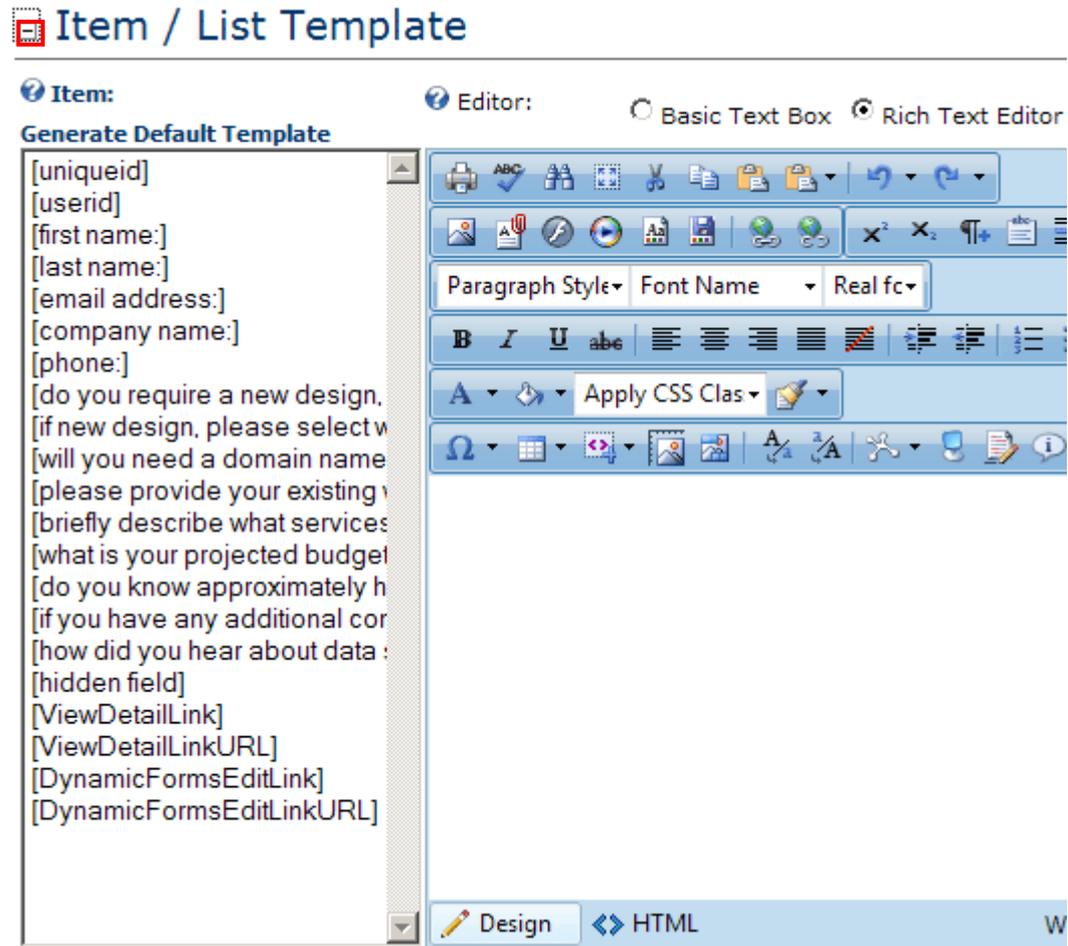


Figure 36: Setting the Item/List Template

The following options and parameters are available:

- **WYSIWYG editor** – the editor for formatting the text
 - **Item** – these tokens are directly related to ‘Columns’ created within the module configuration. These columns are generated based on your table/view, Dynamic Forms instance, or Query.
 - **Note:** If no columns are displayed on the left hand side, make sure you have manually added them by clicking ‘Generate Columns’
- **Generate Default Template** – click this option to automatically generate the template based on the available columns
- **Example Columns from a Dynamic Forms Instance:**
 - **[uniqueid]** – use this token to display the unique ID on the system
 - **[userid]** - use this token to display the user ID
 - **[first name]** - use this token to display the view column for first name
 - **[last name]** - use this token to display the view column for last name

- **[email address]** - use this token to display the user's email address
- **[company name]** - use this token to display the company name
- **[how did you hear about us?]** - use this token to display the information on how the user found you
- **[comments]** - use this token to display comments
- **[ViewDetailLink]** – this parameter is used to display the page with detailed view for this specific record. The detail view is based on the 'Primary Key' selected within the module configuration section.
- **[ViewDetailLinkURL]** - this parameter is used to display the page with detailed view for this specific record and is represented as a full HTTP URL. Utilize this token if you want to have more control over the view detail link such as the link text, or possibly making the view detail link an image. The detail view is based on the 'Primary Key' selected within the module configuration section
- **[DynamicFormsEditLink]** – this parameter is used to display the edit page when Dynamic Forms is specified as the Data Source.
- **[DynamicFormsEditLinkURL]** this parameter is used to display the edit page when Dynamic Forms is specified as the Data Source and is represented as a full HTTP URL. Utilize this token if you want to have more control over the edit link such as the link text, or possibly making the view detail link an image.

In order to setup the template, either click **Generate Default Template** option to automatically populate the available columns, or type the item (along with the bracket) inside the editor e.g. **[first name]** to display the user's first name.

7.2.1 Using the [ViewDetailLink] parameter

The **[ViewDetailLink]** is a specific parameter used in order to display the page with detailed view information.

In other words, you need to include this link within the **Item** part of the page. The link will be displayed and will lead the users towards the page with detailed information (**note**: detailed information is setup within the **Detail** part of the screen – see section 7.3).

In order to include the link perform the following steps:

- 1) Type the text for the link which you wish to display to the users (e.g. **View details** or **More Info**), select that text and click on the chain icon .

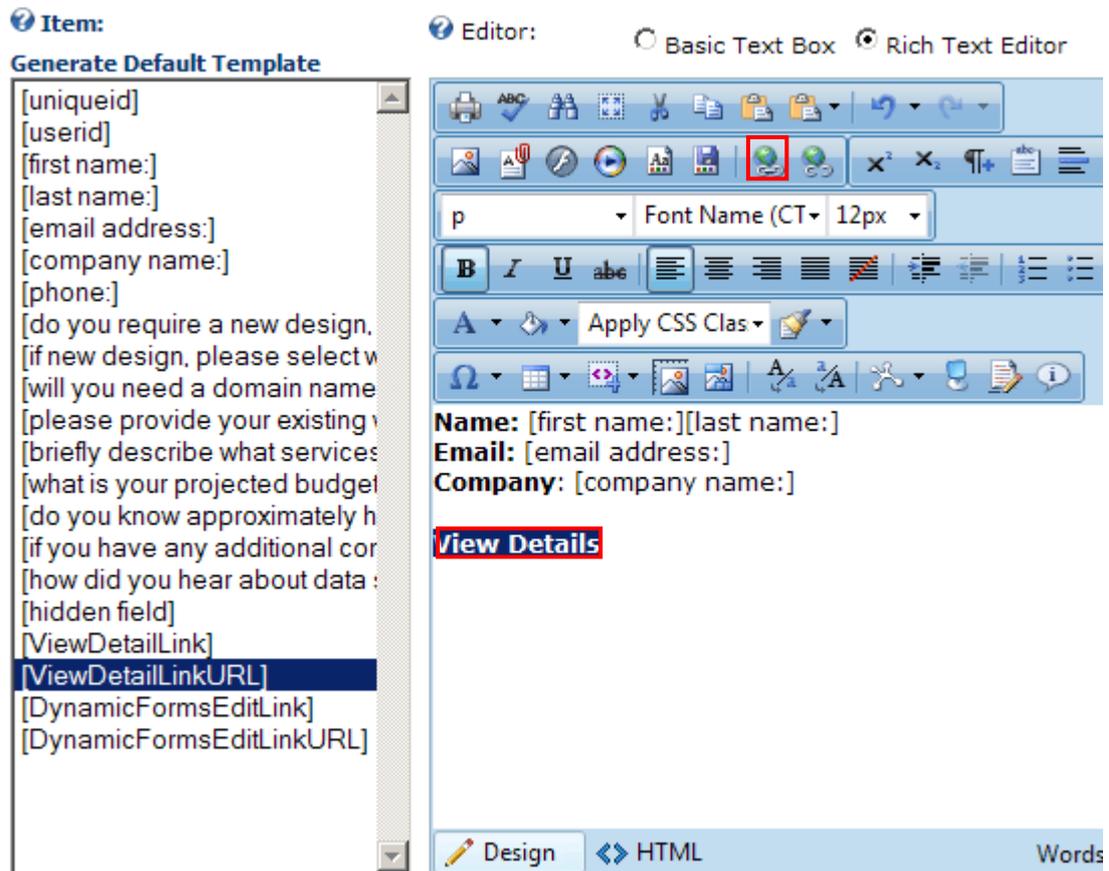


Figure 37: Setting up the view details link

The following screen will be displayed.

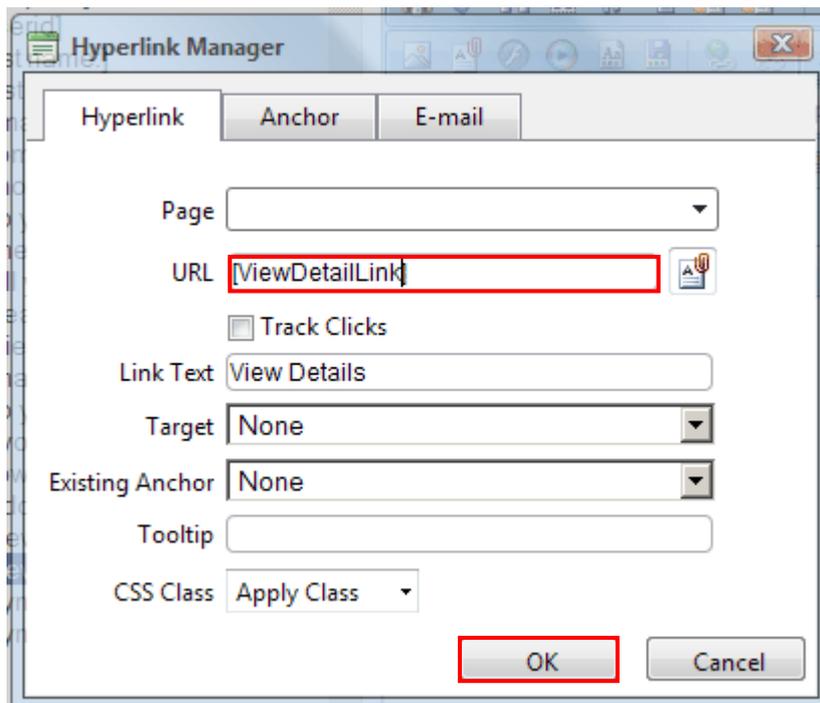


Figure 38: Defining the link

Enter the **[ViewDetailLink]** parameter inside the URL field and click on the **OK** button (**note:** this feature allows you to make the view details link available within any number of HTML possibilities

such as an image, a hyperlink with specific text, a pop up hyperlink, etc). The hyperlink will be defined.

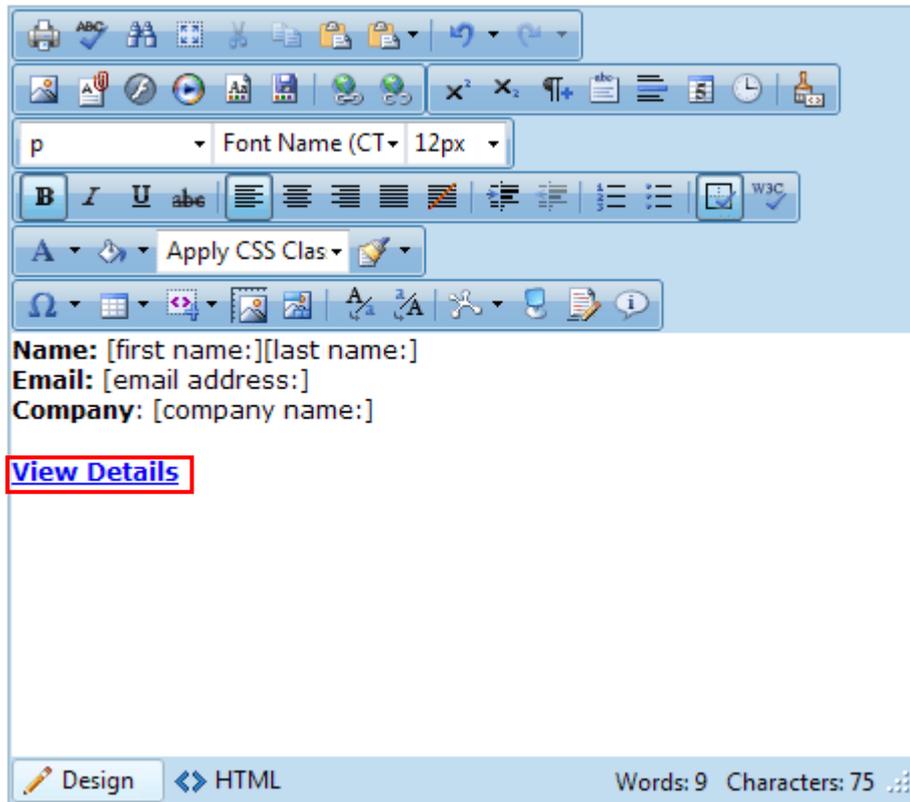


Figure 39: Defining a link towards detailed information

Click on the “Update” link in the bottom of the page to save the changes and complete the procedure. The following screenshot demonstrates the defined links.

Dynamic Views ▾

Control Panel





1.0.0.21433 / 5.1.2

Request email response



[Search](#)

A total of 6 records are displayed.

[ABCDEFGHIJKLMNOPQRSTUVWXYZAll](#)

<p>Name: Alice One Email: alice@test.com Comments: Please explain your licensing options. Response Requested? Yes</p> <hr style="border: 0.5px solid #ccc;"/> <p>View / Edit Options</p> <p>View Details</p> <p>Edit Entry</p>	<p>Name: Diana Four Email: diana@four.com Comments: Will Dynamic Views allow me to search based on specific user responses? Response Requested? Yes</p> <hr style="border: 0.5px solid #ccc;"/> <p>View / Edit Options</p> <p>View Details</p> <p>Edit Entry</p>
--	--

Figure 40: Example of the detailed view

Once you click on the link, the page with the detailed information (as defined within the **Detail** part of the page) will be displayed.

Dynamic Views ▾

Control Panel





1.0.0.21433 / 5.1.2

This is the specific detail record for this specific item

**Alice
One
alice@test.com
Data Springs
[how did you hear about us?]
Please explain your licensing options.**

Figure 41: Example of the page with view details

Note: see section 7.3 for further information on setting up the view details.

7.3 Setting up the view details

The “View Detail Template” option is used for specifying information which will be displayed within the page with view details.

Note: in order for this information to be viewable by end users, you need to include the link towards view details page by inserting the `[ViewDetailLink]` parameter inside the **Item** part of the screen – see section 7.2.1).

So, to start setting the “View Detail Template” expand that option within the “View Template” page.

View Detail Template

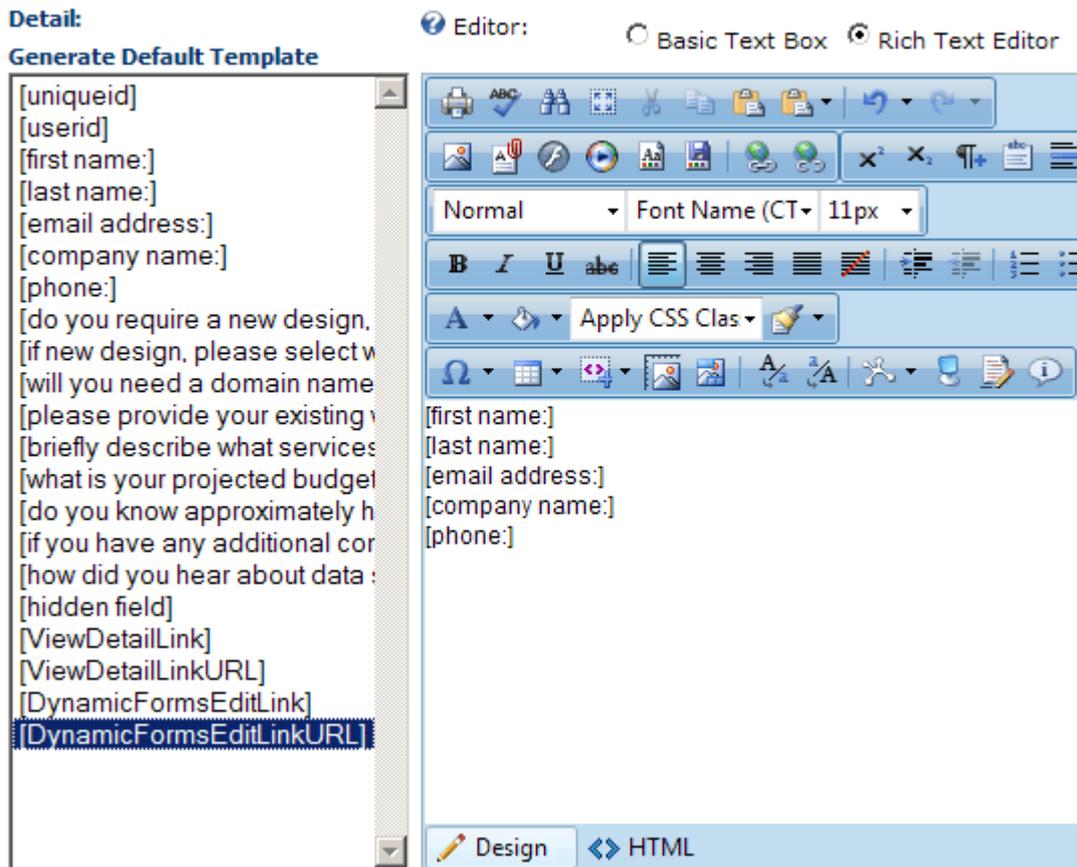


Figure 42: Setting up the View Details Template

The “Detail” part of the page lists all available tokens for setting up the template:

- [uniqueid]
- [userid]
- [first name]
- [last name]
- [email address]
- [company name]
- [how did you hear about us?]
- [comments]
- [request email response]
- [response sent]

Enter the desired tokens in the text area to display that information about the view and click “Update” to save the changes.

7.4 Setting the PDF export template

The “PDF export template” option is used for specifying information which will be displayed within the PDF file which contains the exported information.

In order to start setting the parameters which will be included in the exported PDF file, expand the “PDF Export Template” part of the page.

PDF Export Template

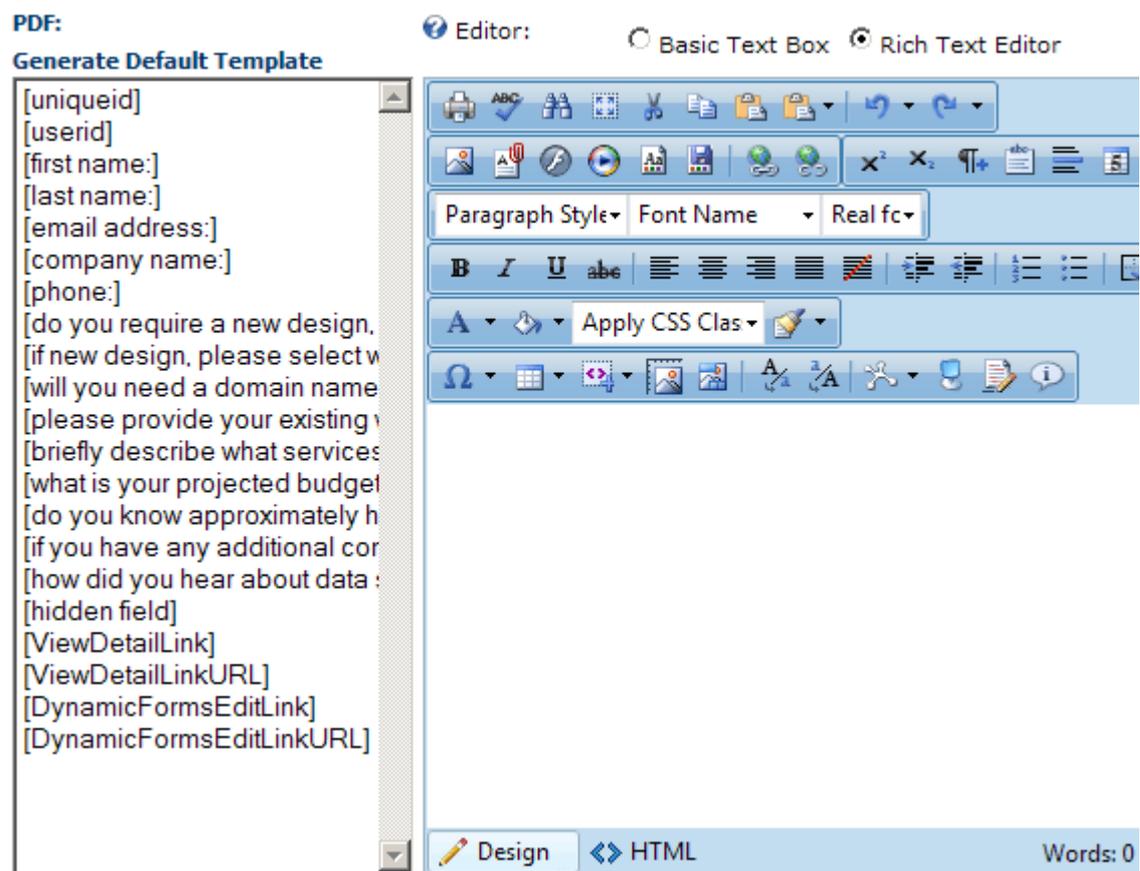


Figure 43: Setting the PDF export template

Choose the desired parameters from the column on the left or click “Generate Default Template” to automatically populate all available items.

Once you have specified the desired items you wish to appear in the exported PDF click “Update” to complete the procedure of setting up this template.

8 MANAGING THE SEARCH FIELDS

In order to start managing the search fields, choose option “Control Panel” from the main menu and then choose “Search Fields”.

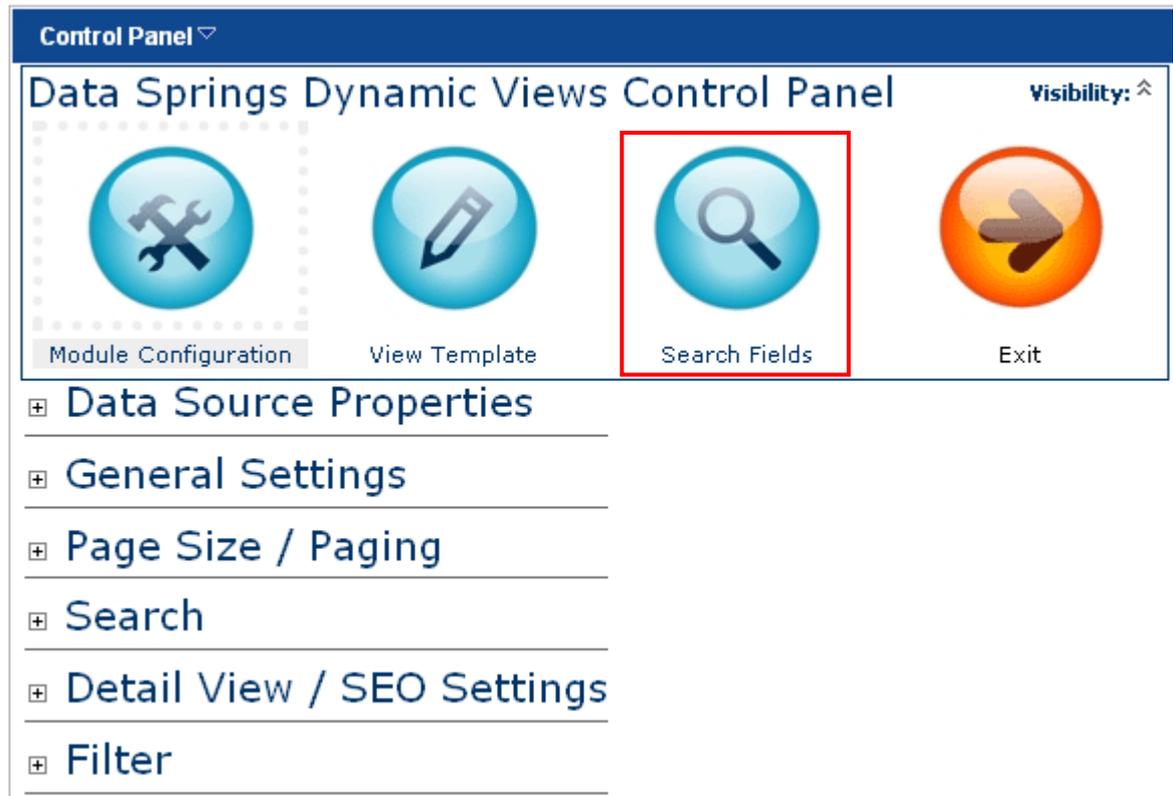


Figure 44: Managing the search fields (step 1/2)

The following page will be displayed.

Field Name

	Criteria	
<input type="checkbox"/>	is Less Than	<input type="radio"/>
<input type="checkbox"/>	Equals	<input type="radio"/>
<input type="checkbox"/>	is Less then or Equal	<input type="radio"/>
<input type="checkbox"/>	Begins With	<input type="radio"/>
<input type="checkbox"/>	Does not equal	<input type="radio"/>
<input type="checkbox"/>	is greater than	<input type="radio"/>
<input type="checkbox"/>	is greater then or equal	<input type="radio"/>
<input type="checkbox"/>	does not begin with	<input type="radio"/>
<input type="checkbox"/>	ends with	<input type="radio"/>
<input type="checkbox"/>	does not end with	<input type="radio"/>
<input type="checkbox"/>	contains	<input type="radio"/>
<input type="checkbox"/>	does not contain	<input type="radio"/>
<input type="checkbox"/>	is empty	<input type="radio"/>
<input type="checkbox"/>	is not empty	<input type="radio"/>

Criteria

Search Label

Default Value

Input Type

Input Values / SQL

Condition

Searchable

SortOrder

Required Field

Required Field Text

Required Field Error Message

[Update](#) [Cancel](#)

Note: If you choose Combo Box for the search field you must enter a SQL Query, or the text 'Values:' followed by a comma separate list of values. For SQL, you should select two fields for 'SearchOption' and 'SearchOptionValue'. Example: Select Text as SearchOption, Text as SearchOptionValue from Lists Where ListName = 'Region'. To bypass SQL and use manual entries enter 'Values:' followed by a comma separated list. Example: 'Values:Yes,No,Maybe'. For complete instructions please visit www.datasprings.com product forums or the Dynamic Views user guide.

Figure 45: Managing the search fields (step 2/2)

The following options and parameters are available:

- **Field Name** – pull down menu for choosing the field the search criteria will be related to
- **Criteria** – set the desired criteria for the field (e.g. “Begins with” or “Contains”); the square checkboxes in the left column represent the options you want to include; the round radio buttons in the right column selects the default option
- **Search label** – use this to enter a more user-friendly label for these criteria. If no search label is defined then the system will default to the criteria name, and then default to the localized variable for the criteria name. For example, you can replace “Postal Code” with “Please enter a zip code.”

- **Default Value** – field for entering the default value for the criteria
- **Input Type** – pull down menu for choosing the desired input type
- **Input Values/SQL** – Dynamic Views supports the ability to load a dropdown list with a list of available values. These values can either be entered or based on a SQL Query

Tip: For SQL, you should select two fields for 'SearchOption' and 'SearchOptionValue'.

Example: Select Text as SearchOption, Text as SearchOptionValue from Lists Where ListName = 'Region'.

Tip: To bypass SQL and use manual entries enter 'Values:' followed by a comma separated list.

Example: Values:Yes,No,Maybe

- **Condition** – currently defaulted to 'and' only
- **Searchable** – select this checkbox to make this criteria searchable
- **Sort Order** – field for setting the sort order by which the criteria will be displayed to users
- **Required field** – select this option to make the field a required field
- **Required field text** – enter the symbol which will denote that the field is required, e.g. *
- **Required field error message** – specify the desired error message in case the user has not filled the required field

After defining the desired options for the search criteria click on the “Update” link and the new search condition will be added.

	FieldName	SearchLabel	DefaultValue	Criteria	InputType	InputSQL	Condition	Searchable	SortOrder	RequiredField	RequiredFieldText	RequiredFieldErrorMessage
	Request email response			contains	TextBox		AND	<input checked="" type="checkbox"/>	10	<input type="checkbox"/>		

Field Name

Criteria	
<input type="checkbox"/>	is Less Than
<input type="checkbox"/>	Equals
<input type="checkbox"/>	is Less then or Equal

Figure 46: The new search criteria successfully added

Once the new search criteria have been added, the following two options will be available:

-  – click on this icon to modify the parameters of the desired search criteria
-  – click on this icon to delete the search criteria

8.1 Special Search Tips & Integration

These are special search tips and integration:

- Leaving the search criteria to be 'equal' or 'contains' will render results if the field is null or blank; by using this method you can have multiple fields such as zip code, city, and state, and allow the user to search based on only the fields that they enter search terms form
- Search fields can now be pre-filled from a querystring variable; so, if you have a search field for FirstName, you can pre-fill this search term by passing in the parameter as follows: ?FirstName=John. Here's another querystring example that's popular for integrating with other modules:
www.yoursite.com/default.aspx?TabID=555&FirstName=John&LastName=Smith.
 - For example you could have another 3rd party module pass in the variables to showcase and pre-fill users by 'City' (such as a list of Cities) and it would pre-fill the terms when the user clicked the link from the 3rd party module.
- Search results can be rendered upon load time, simply add &AutoSearch=True to the querystring and the search results will be rendered. For example, if you wanted the module to load and showcase all users with the firstname of John without having to force the user to click the search button, the URL could be loaded such as:
www.yoursite.com/default.aspx?TabID=555&FirstName=Chad&AutoSearch=True

8.2 Search Localization Settings

The “Dynamic Views” supports localization of the field labels and search conditions. The search conditions localization is now setup in the main **DynamicViews.ascx.resx** file which can be found within the **DesktopModules\Dynamic Views\App_LocalResources** directory. You can manually modify this file with a text editor or change the file under Admin, Languages.



Figure 47: Choosing option "Languages" from the "Admin" menu

Example of changing search conditions text

```
<data name="Begins With.Text">
    <value>Begins With</value>
</data>
```

If you wanted to change the “**Begins With**” to “**Starts With**” you could easily modify this localization setting.

Example of changing search field label

```
<data name="Prefix.Text">
    <value>User Prefix</value>
</data>
```

Note: for view column / field names and extended core fields you create you will need to create localization settings; for example if you create a column name called “[YourColumnName]” you would need to create a localization setting for this property within the DynamicViews.ascx.resx file.

Example for localization of columns

```
<data name="YourColumnName.Text">
    <value>First Name Or Some Other Text Here</value>
</data>
```

9 EXPORTING AND IMPORTING THE CONTENT

The purpose of the export and import options is to allow you to display the already created view or report on some other page within the website.

The first step is to export the content i.e. export the already created view/report. Once the content has been exported, you can add the “Dynamic Views” module to a different page on the website and use the “Import Content” option to add the created view to that page.

9.1 Exporting Dynamic Views content

In order to export the content of the “Dynamic Views” module, choose option “Export Content” from the main menu.

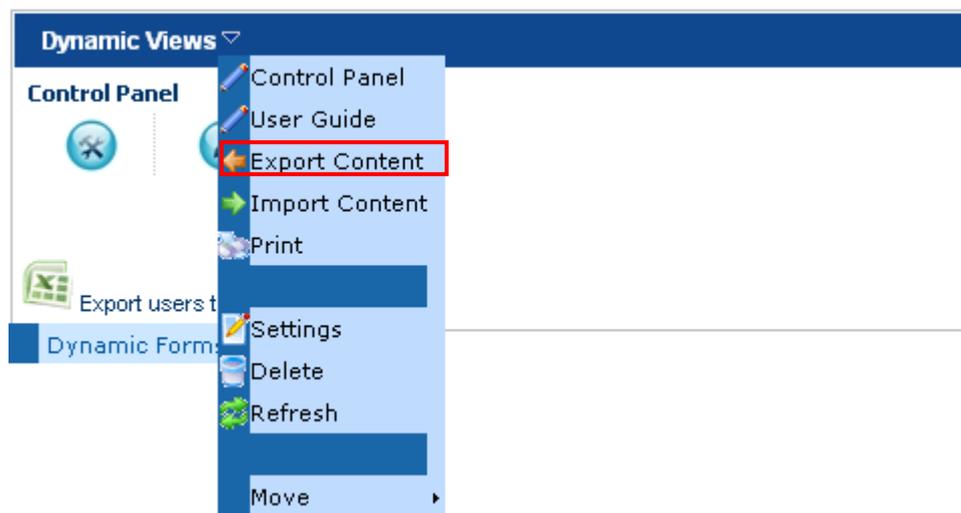


Figure 48: Exporting content from Dynamic Views (step 1/2)

The following page will be displayed.

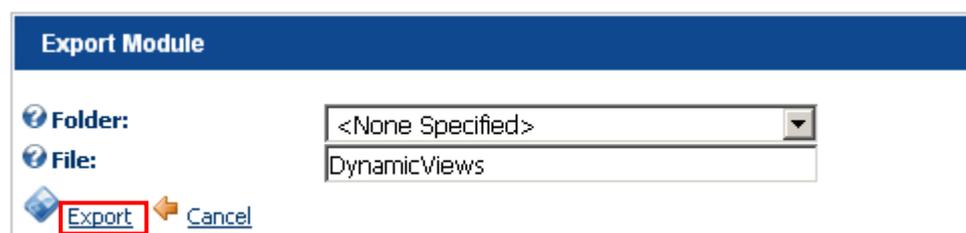


Figure 49: Exporting content from Dynamic Views (step 2/2)

The following options and parameters are available:

- **Folder** – choose the folder on your system the exported file should be saved to
- **File** – enter the name for the exported file

After setting these parameters, click the "Export" link and the content of the view will be exported to a file within the folder you have specified.

Note: the next step is importing the content into a new instance of the view after adding the “Dynamic Views” module to a desired page (see section 9.2).

9.1.1 Exporting Dynamic Views to Excel

In order to export the Dynamic Views to excel, click the “Export Users to Excel” link displayed within the main page.

The screenshot shows the 'Dynamic Views' control panel. It includes a search bar with the text 'Request email response' and a 'Search' button. Below the search bar, it states 'A total of 6 records are displayed.' and provides a navigation menu with letters 'A' through 'Z' and 'All'. Two user records are displayed side-by-side. The first record is for 'Claire Three' with email 'claire@three.com' and a comment 'I just want to thank you for your good work on Dynamic Forms. No need for a reply.' The second record is for 'Fergie Six' with email 'fergie@six.com' and a comment 'I need to have some custom modules created. How do I send you my detailed requirements?'. Below the records, there is a link 'Export view results to Excel' which is highlighted with a red box.

Figure 50: Exporting users to excel (step 1/2)

The following dialog will be displayed.

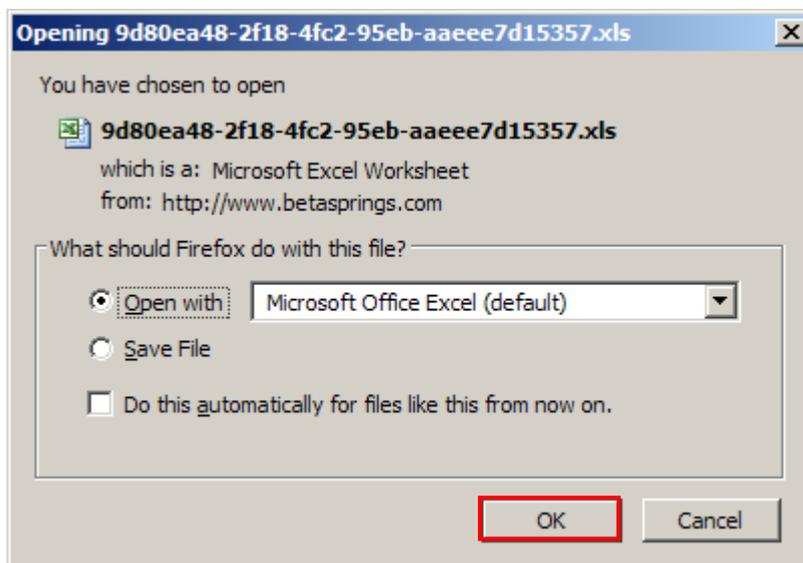


Figure 51: Exporting users to excel (step 2/2)

Choose to either open or save the file on your computer and click “OK”. The Dynamic Views will be exported to an excel file.

9.2 Importing Dynamic Views Content

Note:

- Before importing the content, use the “Export Content” option to export the contents of the view
- After exporting the content, add the “Dynamic Views” module to a desired page and use the “Import Content” option to add the created form to that page

In order to import the content to a different page on the website choose option “Import Content” from the main menu.

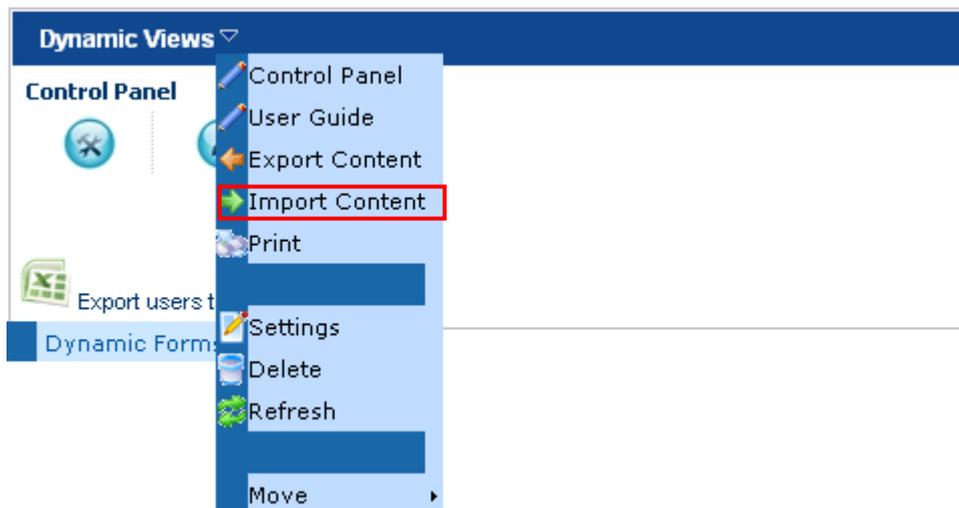


Figure 52: Importing the Dynamic Views Content (step 1/2)

The following page will be displayed.

 A screenshot of the 'Import Module' dialog box. It has a blue header with the text 'Import Module'. Below the header, there are two fields: 'Folder:' with a dropdown menu showing 'Root', and 'File:' with an empty text input field. At the bottom left, there are two buttons: 'Import' with a green arrow icon and 'Cancel' with an orange arrow icon.

Figure 53: Importing the Dynamic Views Content (step 2/2)

The following options and parameters are available:

- **Folder** – select the folder you have previously exported the file to
- **File** – choose the file you have previously exported in order to import it to this instance of the view

After setting these parameters, click on the "Import" link to complete the procedure of importing the content to a new view.

10 DELETING DYNAMIC VIEWS MODULE

In order to delete “Dynamic Views” module, choose option “Delete” from the main menu.

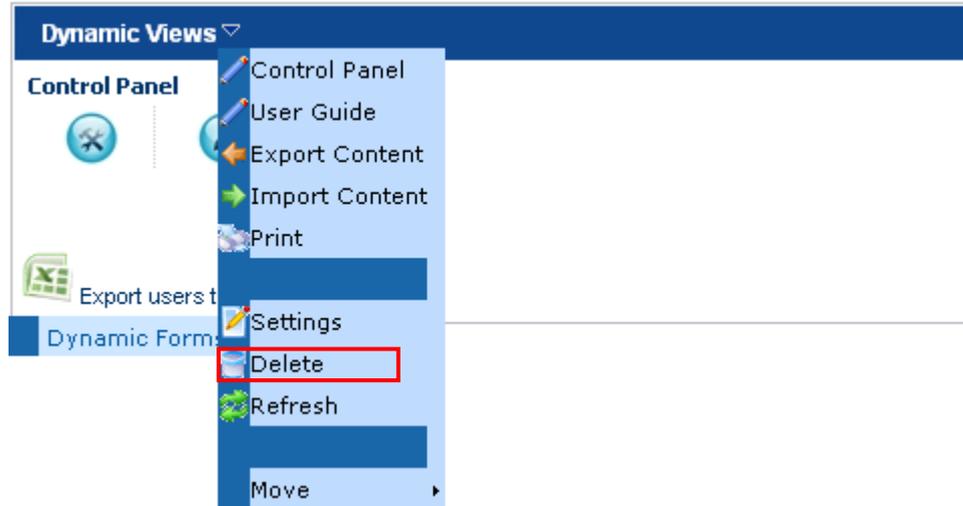


Figure 54: Deleting Dynamic Views (step 1/2)

The following screen will be displayed.

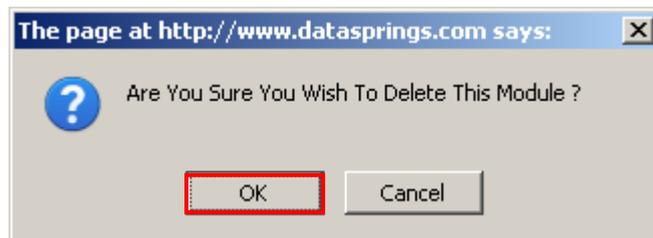


Figure 55: Deleting Dynamic Views (step 2/2)

Click on the “OK” button and the module will be deleted.

11 OTHER RESOURCES

Here is the list of other resources you can use in order to learn as much as possible about different ways you can use the Dynamic Views module.

11.1 Support Forums

You can find several demonstrations that highlight specific functionality for Dynamic Views at:

- [Data Springs Community Support Forums](#)

11.2 Troubleshooting

Please read the following blog post for further information on how to troubleshoot the most common issues: <https://www.datasprings.com/news/blog/postid/22>