

Creating and Modifying Local Tables

When the data you store is used by more than one configurator for more than one purpose, tables are the best way to manage that data.

Objectives

- Let's explore the different places that can offer your configurator tabular data.
- Then, learn all about the most common place, called local tables.
- You'll see how to create a local table, and how to manage the data inside.

Storing Tabular Data

Tabular data are the heart of any configurator, and can be stored in a few different ways, depending on your needs.

First, Select fields have a built-in table of field options.

Here, the table is already designed for you, but you can't change the structure.

You also cannot easily integrate these choices with another source of data.

And the table is stored here inside the configurator so it's harder to share with other configurators.

Overall, the field options are a simple and easy way to start.

For more complex storage you can use a Local Table.

Local tables are separate from a configurator, so you can easily maintain the data.

You can connect one or many configurators to the same Local Table for consistency and easy maintenance.

And local tables are fast.

When the configurator loads on your user's screen, it pre-loads any local tables it needs, so the data can be retrieved almost instantly.

Overall, local tables are a very popular and flexible way to store data.

After using a local table, your design may outgrow it and need a Database Table.

Unlike local tables, Database Tables are not pre-loaded into the configurator.

They remain on the server and give just the information needed at the right time.

Therefore, they can have millions of rows, and store sensitive data.

Furthermore, database tables can be easily integrated with other systems.

A common example is a database table of component costs and availability, which can be synched throughout the day to an ERP system that owns this data.

Overall, database tables are ideal for lots of data or sensitive data that has to stay in synch with other parts of your company.

Finally, keep in mind that functions can make tables.

The blocks of code you'll learn to write can give simple results, like a number, or complex results like a table of numbers.

Tabular data created by a function can be used just like tabular data looked up from a table.

Given those 4 options, which one is most appropriate?

Best practice when creating tables is to design iteratively.

Start simply and add on more complexity when you need it.

First, mockup a field by defining field options.

Then, try using a local table to store your options, business logic, and other data.

Eventually you may need to scale up to a database table or even a function if you have millions of rows or need to calculate those rows on demand.

Creating a Local Table

Local tables are easy to manage.

In the administrative interface, choose Resources... Tables to see the list of tables, and ways to manage them.

To edit an existing table, you would click the name of that table in the list.

To delete or clone a table, you would first check the box next to the table or tables you want to delete or clone, then click the appropriate button at the bottom of the window.

Let's create a table. In the Tables list, click "Add".

A new table designer appears.

First, set the name of the table.

We will follow our best practice of naming temporary or experimental objects with our initials first, so call this "XX-Materials".

The source we will keep at none: that's a more advanced feature described in the documentation.

Currently, this brand-new table has no columns.

We need to create some before we can store any data inside.

Here are the types of data you can place into a table column.

It's important to set the right type, otherwise your table may be hard to use.

You can always add more columns to your table as your needs change.

For example, given this table of information here, three “text” columns will store the data.

To add a column, click the "Add Column" button and specify the name and type.

Don't use spaces: use CamelCase to separate words in your column names.

To edit an existing column in your table, right-click that column and choose "Edit Column" from the pop-up menu. Change the name or the type.

You can create as many columns as you wish. Local Tables have been used successfully with over thirty thousand rows and hundreds of columns.

To reorder columns, first save your table.

Then, click a column header: you'll see the column highlight, and your cursor will turn into a hand.

Drag the column left or right and drop it into place.

If your re-ordering didn't give you the results you want, simply refresh your screen to restore the table to its last saved state and try again.

Changing the order of columns in a table won't break anything, but changing the type of a column can cause problems.

Best practice when editing a table is to clone the table first, so you have a backup you can refer to if necessary.

Managing a Local Table

Local tables can contain just a few rows... or a few thousand rows.

How can you easily fill a local table with data?

You can always edit directly in the table.

The common keystrokes you'd usually use to navigate through a table can be used here.

But for many rows of data, the easiest way to fill a local table is to copy and paste.

We select the data in Excel and then return to our Local Table.

click in the upper-left corner of the Local Table... and paste by pressing CTRL-V.

All the necessary rows are created and filled automatically.

When copying and pasting, remember to ensure that columns are in the right order. Each column should also have the right datatype to accept the data.

For example, pasting text into a number column won't work.

You can easily copy and paste data in the other direction, too.

If a business colleague wants to review or update a table of data, just paste it into a format they're comfortable with, like an Excel spreadsheet file.

Rows can be edited as easily as columns.

First select one or more rows, and then right-click to see a context menu of choices.

For example, you can insert or remove a row.

After making changes to a table, don't forget to save your work.

Recap

You've seen an overview of the different places to store tabular data, and some of the reasons why each is useful.

You've also learned about the most common place, called local tables.

You're now familiar with creating a local table and managing the data inside.

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