

Data-Viewer Web Part for SharePoint 2010

Release 3.2 (HW37)

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System Requirements

Operating System	Windows Server 2003 or 2008
Server	SharePoint 2010: - Microsoft SharePoint Foundation 2010 or Microsoft SharePoint Server 2010
Browser	Microsoft Internet Explorer 8 or higher

Installation

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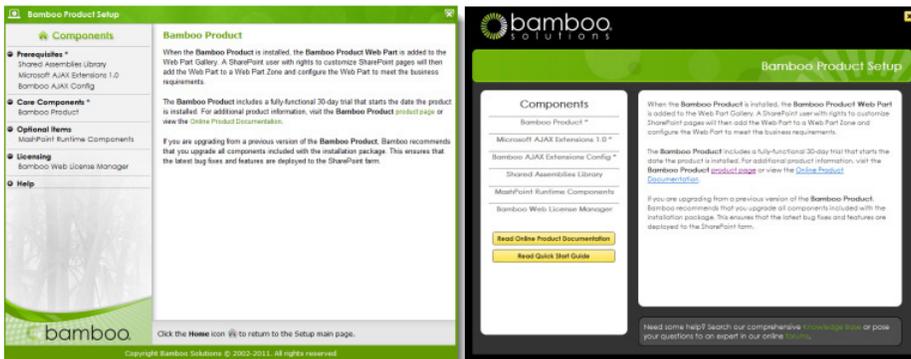
About the Setup Program

Before installing the product, read the **Installing the Product** section of the Online Documentation and review [KB.12464: Best Practices for Installing Bamboo Products](#).

To access the Setup program:

1. Download the self-extracting product EXE from the storefront and save it to a local folder on the SharePoint server.
2. Double-click the product EXE file to extract the contents of the product download.
3. **The Setup program will automatically start.** To start the Setup program manually, double-click the **Setup.bat** file in the root of the folder where the product files were extracted.

The Setup program may look different for different product versions. See examples below of the two Setup programs that are currently in use. Both versions of the Setup program work the same way.



Note: The minimum screen resolution to view the Setup program is 1024x768.

The Setup program contains links to each product component under the **Components** header on the left. Click on any of these links to view a description of the component on the right. The component description contains important information about where to install the component and the required permissions for the installation account. Read this information carefully before proceeding.

Each product may have several components, which fall into the following categories:

- **Prerequisites:** Some products include prerequisite components that must be installed **before** the Bamboo product core components. Not all products will have prerequisites. Examples of prerequisites include the Shared Assemblies Library, Microsoft AJAX Extensions, and Bamboo AJAX Config.
- **Core Components:** The product will include one or more core components that are required for the Bamboo product to work.
- **Optional Items:** Optional items provide additional features or functionality but are not required to use the Bamboo product. Not all products will have optional items. Examples of optional items include the MashPoint Runtime Components and sample ASP.NET applications.
- **Licensing:** All products will include the Bamboo Web License Manager or Bamboo License Manager. Licensing is required to activate a product license. It is not required during 30-day product trials.
- **Help:** The Setup program also contains links to the Online Documentation and the Installation and Licensing Quick Start Guide. Links to other product-related resources, like the [Bamboo Knowledge Base](#), may also be included.

After reviewing the installation location and required installation permissions for a component, click the **Install** button at the bottom of the Setup screen to install it. If the product includes multiple components, click the Install button for each component.

Click the Home icon  to return to the Setup main page.

About the extracted product files:

The extracted product files include the file **Setup.bat**, which launches the Setup program, and may also include the following folders:

- **\[Product].wsp**: Contains the solution deployment file for this product. There may be more than one product WSP folder, depending on the product.
- **\docs**: Contains the Installation and Licensing Quick Start Guide.
- **\msi** : Contains installation executables for this product.
- **\res**: Contains files required by the Setup program.
- There may be other folders, depending on the requirements for the product.

Installing the Product

Read all of the following information before installing the product:

- [Recommendations for a Successful Installation](#)
- [Installation Location](#)
- [Required Installation Permissions](#)
- [Installation Instructions](#)

Recommendations for a Successful Installation

Follow these guidelines to ensure a successful installation:

1. Back up your system.
2. Make sure that your system meets the requirements listed in the **System Requirements** section.
3. Review [KB.12464: Best Practices for Installing Bamboo Products](#) before installing any product.
4. Review the **Installation Location** and **Required Installation Permissions** for each product before installing it.
5. Stop the **World Wide Web Publishing Service** before installation.
6. If you are upgrading the product from a SharePoint 2007 version to a SharePoint 2010 version, read [KB.12630: Migrating Bamboo Products from SharePoint 2007 to SharePoint 2010](#).

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Installation Location

If you are installing a Bamboo product in a SharePoint farm environment, make sure to start the installation on the correct server. The required installation location is listed in the Setup program in the description for each component.

Most Bamboo products must be installed on one Web front-end (WFE) server in the SharePoint farm where the **Microsoft SharePoint Foundation Web Application** service is running. Check **Central Administration > System Settings** for a list of servers running this service. The product will automatically be deployed to all other WFE servers in your farm.

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Required Installation Permissions

Required installation permissions are listed in the Setup program in the description for each component. For most Bamboo products, the installation account must have the following permissions:

- Member of the local server **Administrators** group
- Member of the SharePoint **Farm Administrators** group
- **Site collection administrator** (for automatic feature activation)

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Installation Instructions

1. If the Setup program is not already running, double-click the **Setup.bat** file in the root of the product folder to launch it.
2. Select the product component in the Setup program. Verify the installation location and required permissions and then click **Install**.
3. Click **Next** to begin the installation. Verify that the system checks pass successfully, then read and accept the End-User License Agreement.
4. In the **Deployment Targets** screen, select the Web application(s) where you want to install the product. Leave the **Automatically activate features** option checked to activate product features during installation. Click **Next** to begin installation.

Note: If you prefer to activate product features manually after installation, uncheck the **Automatically activate features** option, then read **Manually Activating the Product Features** in the Online Documentation.

5. When installation is complete, review the summary screen to confirm that the product installed successfully. Click **Close**.

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Upgrading the Product

If you have already installed an older version of this product and you want to install the new version, then you will need to perform the following upgrade procedure.

To upgrade:

1. Double-click the product EXE file.
2. Select the component you want to upgrade, then click the **Install** button.
3. Click **Next** to perform system checks.
4. Click **Next** after the system checks have completed, then select the **Repair/Upgrade** option, and click **Next**.
5. After the component has been upgraded successfully, click **Finish**.

Manually Activating the Product Feature for a Site Collection

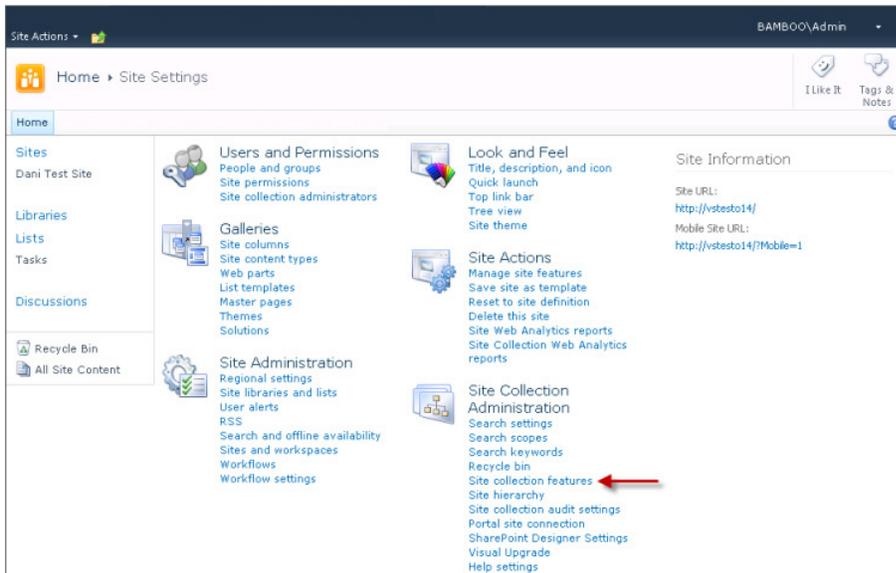
Product feature activations can be done automatically at the site collection level when the product is installed. There are several reasons why you may need to manually activate (or deactivate) Bamboo product features:

- You opted out of automatic feature activation during installation.
- You add a new site collection and want to add Bamboo features to it.
- You want to remove Bamboo product features from an existing site collection.

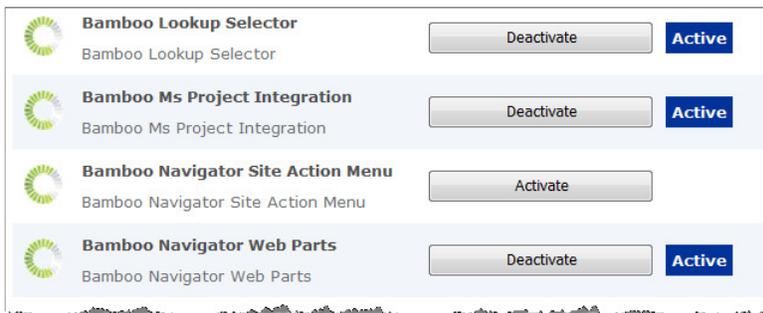
To manually activate (or deactivate) Bamboo product features, follow the instructions below.

Note: You must be a SharePoint site collection administrator to activate or deactivate features. Site collection administrators are assigned in SharePoint Central Administration.

1. From the top-level site in the site collection, go to **Site Actions > Site Settings > Site Collection Administration > Site Collection Features**.



2. Locate the Bamboo product feature. Click **Activate** to activate it for the entire site collection, or click **Deactivate** to deactivate it.



Locating the Error Log Files

Errors for this product are logged to `%SystemDrive%\Windows\Temp\BambooSolutions\bsc_bamboo_%processid%.log` on the server in the SharePoint farm running the **Microsoft SharePoint Foundation Web Application** service. Refer to **System Settings** in SharePoint Central Administration for a list of servers running this service.

Uninstalling the Product

1. Delete the Web Part from all pages within each Web Application where the product is installed.
2. Double-click the product EXE file.
3. From the Setup program, click the product component button under the Components section, and then click **Install**.
4. The program performs the system checks again. Once that has successfully completed, the program prompts you to Repair/Upgrade, Remove, Install New. Select **Remove**, and click **Next**.

Manual Product Installation and Uninstallation

- [Manual Product Installation](#)
- [Manual Product Uninstallation](#)

Manual Product Installation

WARNING: Bamboo recommends using the Setup program to install product components whenever possible. The Setup program is designed to ensure a successful product installation. Manual installation may lead to unexpected behavior during product configuration, licensing, or use, especially if your SharePoint environment contains issues normally detected and resolved when running the Setup program.

The exact steps for manual installation will vary depending on the version of SharePoint the product is for, your SharePoint environment, and the individual product features. The information provided here includes general instructions for most product installation scenarios you may encounter. **Read all sections carefully before manually installing a product.**

- [About the Installation Files](#)
- [Important Notes About Manual Installation](#)
- [Manually Starting a Component Setup Application](#)
- [Manually Installing and Deploying a Product Solution \(WSP\)](#)
- [Manually Installing a Product MSI](#)

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About the Installation Files

When you extract the product EXE, several folders are created that contain installation files and Setup program configuration files. For manual installation, you will be accessing the following folders that contain installation files:

- **\[Component].wsp** - There may be several folders ending in .wsp, depending on your product. Each WSP folder contains the installation files for a [SharePoint solution](#).
- **\msi** - The MSI folder may contain multiple files ending in .msi. Each .msi file is a single Windows installer package.

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Important Notes About Manual Installation

- **Bamboo Web License Manager:** If a product includes Bamboo Web License Manager (**\Bamboo.Web.Licensing.wsp**), add the solution to the solution store on the server running the **Central Administration** service, and deploy the solution to the Central Administration Web application.
- **Shared Assemblies Library (SharePoint 2007):** If a product includes the Shared Assemblies Library (**\msi\Bamboo.Core.V1.2.msi**), you must install the MSI on all Web front-end servers in the farm.
- **Microsoft AJAX Extensions (SharePoint 2007):** If a product includes the Microsoft AJAX Extensions (**\msi\ASPAJAXExtSetup.msi**), you must install the MSI on all Web front-end servers in the farm.
- **Bamboo AJAX Config (SharePoint 2007):** If a product includes the Microsoft AJAX Extensions, the Bamboo AJAX Config (**\Bamboo.AJAX.Config.wsp**) solution must also be deployed. Deploy the solution to all Web applications in the farm where the product will be installed. You may also need to deploy this solution to the Central Administration Web application. Consult the **Online Documentation** for your product for more information.
- **\msi*.x64.msi:** Some MSI installers in the **\msi** installation folder have a 32-bit version and a 64-bit version. The 64-bit version will include **.x64** in the file name. Run the version of the MSI that is appropriate for your operating system. Do not install both.
- **PackInstallation.wsp:** Some products include an installation folder called PackInstallation.wsp. This folder is not needed during the manual installation process and can be ignored.

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Manually Starting a Component Setup Application

For your convenience, each component Setup application can be started directly from the Bamboo Setup program. The Bamboo Setup program can be started by double-clicking the file **Setup.bat** in the root of the extracted product folder.

If you prefer to start an individual product component Setup from the product installation folder instead of from the Bamboo Setup program, navigate to its installation folder and double-click the **\[Component].wsp\Setup.exe** or **\msi\[Component].msi** file. The installation wizard for that component will start. Follow the installation instructions provided in the **Online Documentation** for your product.

For example: To install and deploy just the Bamboo AJAX Config component from the product installation folders, navigate to the **\Bamboo.AJAX.Config.wsp** folder and double-click the file **Setup.exe**.

If you start a component Setup application this way, you do not need to follow instructions for [Manually Installing and Deploying a Product Solution](#).

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Manually Installing and Deploying a Product Solution (WSP)

Before installing, stop the **World Wide Web Publishing Service (W3SVC)**. This will ensure that no system files that need to be updated are locked, which may cause the installation to fail.

Your product may include several SharePoint solutions in multiple `\\[Component].wsp` installation folders. Follow all steps in this section for each solution.

The instructions in this section use the `stsadm.exe` command, which can be found in the following location:

- SharePoint 2007: %PROGRAMFILES%\Common Files\Microsoft Shared\Web Server Extensions\12\BIN
- SharePoint 2010: %PROGRAMFILES%\Common Files\Microsoft Shared\Web Server Extensions\14\BIN

Step 1: Add the solution to the SharePoint solution store

Perform this step on one server in your SharePoint farm running the SharePoint 2007 **Windows SharePoint Services Web Application** service or the SharePoint 2010 **Microsoft SharePoint Foundation Web Application** service. Use an account that is a member of the local server **Administrators** group.

Note: For the Bamboo Web License Manager solution (`\\Bamboo.Web.Licensing.wsp`), perform these steps on a server running the **Central Administration** service.

- Run the following command to add each SharePoint solution to the solution store:

```
stsadm.exe -o addsolution -filename [path]\[Component].wsp\cab\[Component].wsp
```

[path] - the path to the extracted installation folders

[Component] - the name of the component you are installing, as shown in the installation folder. **The name of the component in the cab sub-folder may be different than the installation folder name.**

Step 2: Deploy the SharePoint solution

After installing a SharePoint solution, it must be deployed to one or more Web applications. This section provides instructions for deploying from the command line or from SharePoint Central Administration. Pick the method that best fits your requirements.

Option 1: Command-line Deployment

Perform these steps on one server in your SharePoint farm running the SharePoint 2007 **Windows SharePoint Services Web Application** service or the SharePoint 2010 **Microsoft SharePoint Foundation Web Application** service. Use an account that is a member of the local server **Administrators** group.

Note: For the Bamboo Web License Manager solution (`Bamboo.UI.Licensing.wsp`), perform these steps on a server running the **Central Administration** service.

1. Schedule the solution for deployment to the SharePoint solution store using one of the options below.

- Deploy a solution to a specific Web application (repeat for multiple Web applications):

```
stsadm.exe -o deploysolution -name [Component].wsp -immediate -url [http://WebApplicationUri:portNumber] -allowGacDeployment -allowCasPolicies
```

[Component] - the name of the component you installed, as shown in the **cab** installation sub-folder

[http://WebApplicationUri:portNumber] - the URL and Port for the target Web application

- Deploy a solution to all Web applications EXCEPT the Central Administration Web application:

```
stsadm.exe -o deploysolution -name [Component].wsp -immediate -allcontenturls -allowGacDeployment -allowCasPolicies
```

[Component] - the name of the component you installed, as shown in the **cab** installation sub-folder

2. Execute the deployment job on **each Web front-end server in the farm:**

```
stsadm.exe -o execadmsvcjobs
```

Option 2: Deployment from SharePoint Central Administration

Perform these steps using an account that is a member of the SharePoint **Farm Administrators** group.

1. SharePoint 2007: In SharePoint Central Administration, click the **Operations** link. In the Global Configuration section, click the **Solution Management** link.
SharePoint 2010: In SharePoint Central Administration, click the **System Settings** link. In the Farm Management section, click the **Manage farm solutions** link.
2. Click on the name of the solution you just installed.
3. Click the **Deploy Solution** link.
4. Select the Web application to deploy to and a deployment schedule, and then click **OK**.

Step 3: Manually Activate the Product Feature

After the Bamboo product solution is deployed, it must be activated in each site collection before it can be used.

Perform these steps using an account that is a SharePoint **site collection administrator**.

1. From the top-level site in the site collection, go to **Site Actions > Site Settings > Site Collection Administration > Site Collection Features**.
2. Locate the Bamboo product feature and click **Activate** to activate it for the entire site collection. Some products have more than one feature. Refer to the **Online Documentation** for your product for more information about manual feature activation.

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Manually Installing a Product MSI

Your product may include several components in the `\msi` installation folder, in addition to or instead of SharePoint solutions. Double-click on each MSI file to install it.

MSI files must be installed on each server where the product is installed. Read the [Important Notes About Manual Installation](#) section for information about specific MSI files included with Bamboo products.

Note: Some MSI installers in the `\msi` installation folder have a 32-bit and 64-bit version. The 64-bit version will include `.x64` in the file name. Run the version of the MSI that is appropriate for your operating system. Do not install both.

If you prefer to run the MSI installer from the command line, refer to the Microsoft TechNet article [Msiexec \(command-line options\)](#) for installation options.

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Manual Product Uninstallation

Products may include a combination of SharePoint solutions (WSPs) and components installed using an MSI installer. Refer to the [original installation files](#) for information about the components that may have been installed. To manually uninstall a product component, read the following sections:

- [Manually Uninstalling a SharePoint Solution](#)
- [Manually Uninstalling a Product MSI](#)
- [After Uninstalling a Product](#)

Manually Uninstalling a SharePoint Solution

Your product may include several SharePoint solutions. Follow all steps in this section for each solution that you want to uninstall.

For command-line uninstallation, you will need the name of the SharePoint solution that was deployed. This can be found in the `cab` installation sub-folder for a component.

The instructions in this section use the `stsadm.exe` command, which can be found in the following location:

- SharePoint 2007: `%PROGRAMFILES%\Common Files\Microsoft Shared\Web Server Extensions\12\BIN`
- SharePoint 2010: `%PROGRAMFILES%\Common Files\Microsoft Shared\Web Server Extensions\14\BIN`

To uninstall a SharePoint solution from the command line:

1. Schedule the solution to be retracted from the Web application (Example 1) or from all Web applications EXCEPT Central Administration (Example 2):

```
Example 1: stsadm.exe -o retractsolution -name [Component].wsp -immediate -url [http://WebApplicationUri:Port]
```

```
Example 2: stsadm.exe -o retractsolution -name [Component].wsp -immediate -allcontenturls
```

[Component] - the name of the installed component, as shown in the `cab` installation sub-folder

[http://WebApplicationUri:portNumber] - the URL and Port for the Web application where the solution is installed

2. Execute the retraction job on **each Web front-end server in the farm:**

```
stsadm.exe -o execadmsvcjobs
```

3. Delete the solution from the SharePoint solution store only AFTER the retraction job is complete:

```
stsadm.exe -o deletesolution -name [Component].wsp
```

[Component] - the name of the installed component, as shown in the `cab` installation sub-folder

Additional Information:

- The Bamboo AJAX Config and Bamboo Core solutions may be used by multiple Bamboo products. Do not uninstall them unless you are certain they are no longer in use.

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Uninstalling a Product MSI

If a product was installed using an MSI installer, it will be listed in the installed **Programs and Features** list in the Control Panel. To uninstall it, click on the name of the program and click **Uninstall**.

If you prefer to uninstall the MSI from the command line, refer to the Microsoft TechNet article [Msiexec \(command-line options\)](#) for installation options.

Additional Information:

- The Bamboo Core and Microsoft AJAX Extensions may be used by multiple Bamboo products. Do not uninstall these unless you are certain they are no longer used.
- Some product MSIs, like Bamboo Core and Microsoft AJAX Extensions, are installed on all Web front-end servers in the farm. To completely uninstall these components, you must uninstall them from each Web front-end server where they were installed.

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After Uninstalling a Product

Uninstalling a product will not remove product-related Web Parts from SharePoint site pages. To remove a Web Part from a page after a product is uninstalled:

1. On the page that contains the Web Part, go to **Site Actions > Edit Page**.
2. Click the Edit menu for the Web Part and select **Delete**.
3. Exit Edit Mode to save the page.

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Installed Files

The following files are installed as part of the Bamboo Data-Viewer Web Part package:

Filename	Type	Purpose
Bamboo.SPGridView.dll	Assembly	Web Part Assembly
Bamboo.Licensing.dll	Assembly	Licensing Assembly installed in the GAC
Bamboo.SPGridView.wsp		In case you need to install this Web Part manually.

The installation process also updates your **web.config** file. If you cannot install the Web Part using the automated process and plan to install it manually, be sure to add the following to your **web.config** file:

```
< SafeControl Assembly="Bamboo.SPGridView, Version=1.0.0.0, Culture=neutral, PublicKeyToken=2cc91efae2d531be" Namespace="Bamboo.WebParts"
Type="*" Safe="True" />
```

Code Access Security

The following PermissionSet and CodeGroup markup may be installed by wppackager. For complete details on code access permissions within SharePoint, read the code access security whitepaper listed in the **References** section.

Class	Name	Version	Public Key Blob
StrongNameMembershipCondition	Bamboo.SPGridView	1	0x00240000048000009400000060200000024000052534131000400000100010099189C71722AEBE6ADF12BF1FF2828C9DC20BFB75
StrongNameMembershipCondition	Bamboo.Licensing	1	002400000480000094000000602000000240000525341310004000001000100A76FDA645D3FCF461C428E0112290EABE802951AFA0

If you must install this Web Part manually, the following security is needed if a custom security policy file is to be implemented:

Permission	Custom Setting
System.Data.SqlClient.SqlClientPermission	Unrestricted="true"
System.Web.AspNetHostingPermission	Level="Medium"
System.Security.Permissions.FileIOPermission	Unrestricted="true"
System.Security.Permissions.RegistryPermission	Unrestricted="true"
System.Security.Permissions.ReflectionPermission	Flags="3"
SecurityPermission	Flags="Execution, ControlThread, ControlPrincipal, UnmanagedCode"
SharePointPermission	ObjectModel="True"
WebPartPermission	Connections="True"
System.Net.WebPermission	<ConnectAccess> <URI uri="*" /> </ConnectAccess>
System.Security.Permissions.EnvironmentPermission	Read="TEMP;TMP;USERNAME;OS;COMPUTERNAME"

To set up your own custom security policy, refer to the following links for more information.

The Bamboo Solutions FAQ at:

- <http://store.bamboosolutions.com/KB/attachments/SharePoint%20WP-CAS%20FAQ-GUID0e4c183d940f4138baa254aa9db73e40.pdf>
- http://msdn.microsoft.com/library/default.asp?url=/library/en-us/odc_SP2003_ta/html/sharepoint_wsscodeaccesssecurity.asp

Configuration

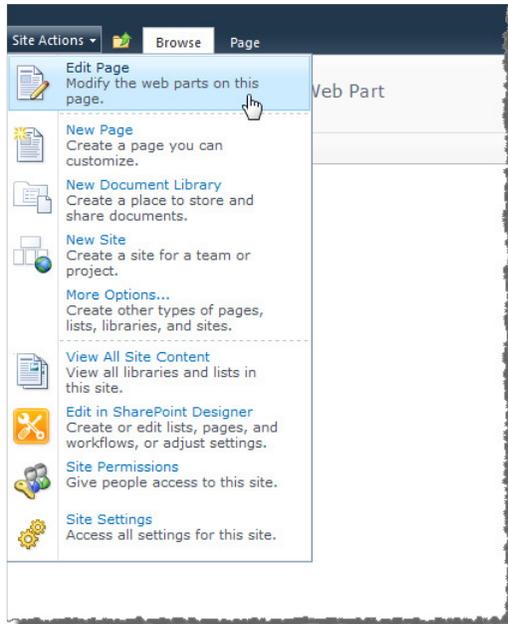
- [Adding the Data-Viewer Web Part to a Page](#)
- [Configuring the Data-Viewer Web Part](#)
- [Styling the Data-Viewer Web Part](#)
- [Localizing the Data-Viewer Web Part](#)

Adding the Web Part to a Page in SharePoint 2010

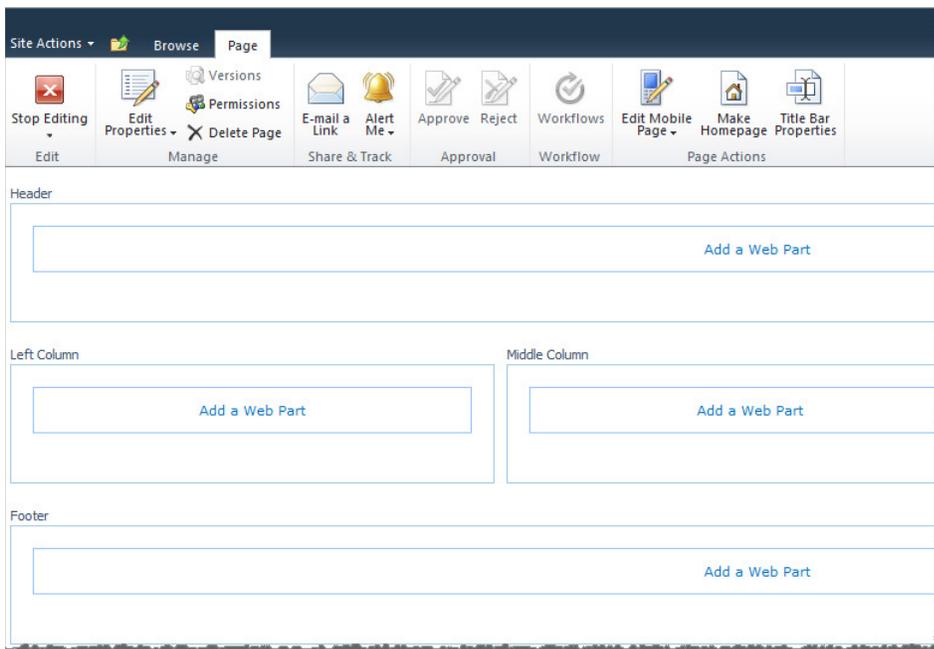
After the product is installed, it is available in the Virtual Server Gallery. Users with the Designer or Full Control permission levels can add the Web Part to web site pages.

To add the Web Part to a page:

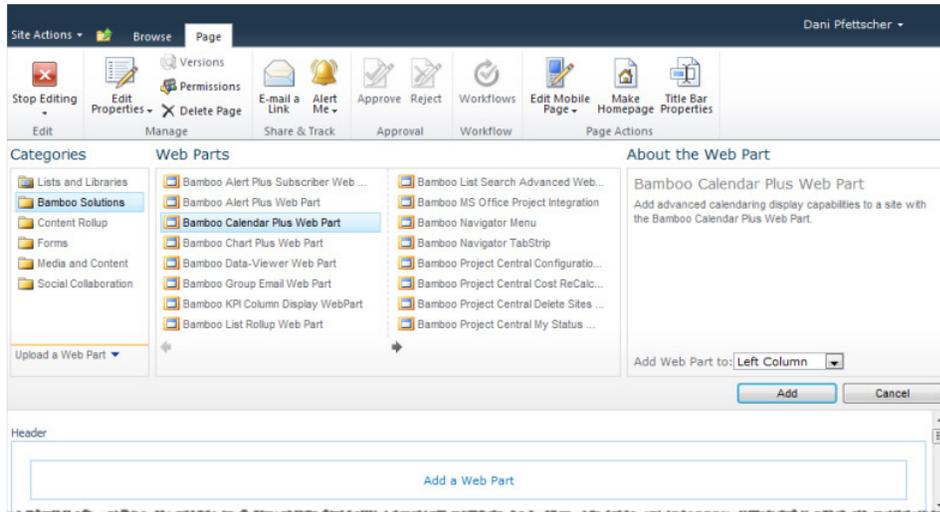
1. From a web site page, click **Site Actions** in the upper left corner, then select **Edit Page**.



2. Click **Add a Web Part** in the area on the page where you want to add the Web Part.



3. Select a category, select a Web Part (use the arrows at the bottom of the Web Part area to scroll through all Web Parts available in the selected category), read about the Web Part and choose to add it to a different area of the page if needed, then click **Add**.



4. Click the **Stop Editing** button in the ribbon to stop editing the page. Then select the **Browse** tab at the top left of the page to see the page as other users will view it.

Configuring the Data-Viewer Web Part

To create a new Data-Viewer Web Part grid view, add the **Bamboo Data-Viewer Web Part** to a page and modify the Web Part properties. The following settings are available for the Data-Viewer Web Part:

- [Data Source and Data Source Settings](#) (Required)
- [Available Columns](#) (Required)
- [Nested Data Settings](#)
- [Group By Settings](#)
- [Sort Settings](#)
- [Filter Settings](#)
- [Conditional Formatting Settings](#)
- [Calculated Settings](#)
- [Dynamic Settings](#)
- [Export Settings](#)
- [Item Limit Settings](#)
- [Style Settings](#)
- [Language Settings](#)
- [Asynchronous Page Load](#)
- [Saving the Data-Viewer Web Part Configuration](#) (Required)

Data Source and Data Source Settings (Required)

Select the type of Data Source you want to connect to and configure the associated Data Source Settings.

- **SharePoint List:** Select this option to display data from a SharePoint list or library.
 - **Site:** Enter the site containing the list or library you want to display in the Data-Viewer Web Part and click the green arrow to refresh the Master List drop-down with the lists and libraries from that site. You can enter the site URL as a static URL (http://domain/site) or a relative URL (./site). **Note:** Relative URLs should be used for SharePoint Web applications containing multiple Alternative Access Mappings (AAM) or if the Web Part is part of a site template.
 - **Master List:** Select a SharePoint list or library to include in the Data-Viewer Web Part. This list acts as a master list when you choose to display nested child list data in the Web Part.
 - **List View:** Select an available list view to apply filter settings configured for the selected list or library. See the [Filter Settings](#) section for more information.

Bamboo Data-Viewer Web Part

Data Source

- SharePoint List
- SQL Server
- List RollUp
- MashPoint/BDC

Data Source Settings

Site: / 

Click the arrow button to populate List and View drop-down selections.

Master List:

List View:

- **SQL Server:** Select this option to display data from a SQL table or view.
 - **Server Name:** Enter the name of the SQL server instance.
 - **Database Name:** Enter the name of the database you want to connect to.
 - **Windows Authentication:** Select this check box if you want to use the currently logged in user to access the SQL database. You must have enabled Windows Authentication as the Authentication Mode in SQL Server in order to access the database successfully. If you do not select this check box, then you must enter a SQL user name and password to access the database. **NOTE:** Windows Authentication mode is only supported if the SQL Server is on the same server as the Web front-end server, as would be the case in SharePoint Standalone deployments.
 - **User Name:** Enter a SQL user name that has access rights to the database.
 - **Password:** Enter the SQL password.
 - **Connect:** Click the **Connect** button to connect to the database and populate the **Master Table/View** drop-down list.
 - **Master Table/View:** Select a SQL table. This table acts as a master table when you choose to display nested child table data in the Web Part.

Bamboo Data-Viewer Web Part

Data Source

- SharePoint List
- SQL Server
- List RollUp
- MashPoint/BDC

Data Source Settings

Server Name:

Database Name:

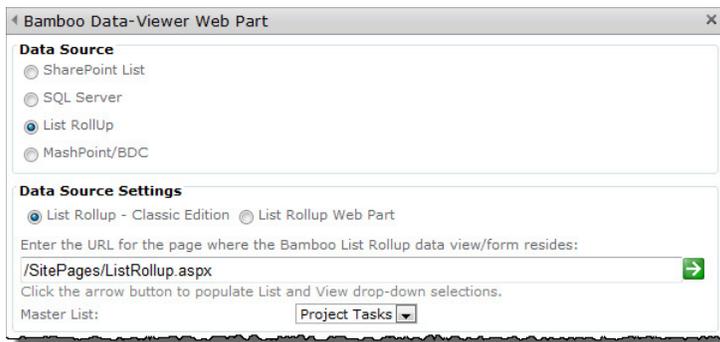
Windows Authentication

User Name:

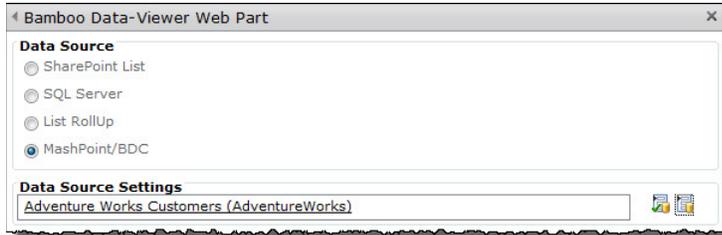
Password:

Master Table/View:

- **List Rollup:** Select this option to display items from a Bamboo List Rollup in the Data-Viewer Web Part. For more information about the Bamboo List Rollup Web Part, visit the [product page](#) or view the [Online Documentation](#).
 - **List Rollup Type:** Select the List Rollup type you want to use. Select **List Rollup - Classic Edition** if the List Rollup was created using the **Bamboo List Rollup Classic Edition** Web Part. Select **List Rollup Web Part** if the List Rollup was created using the **Bamboo List Rollup Schema Designer** Web Part.
 - **Enter the URL for the page where the Bamboo List Rollup data view/form resides:** Enter the appropriate page or site URL for the List Rollup and click the green arrow to refresh the **Master List** drop-down with available Data Views or List Rollup Schemas.
 - **List Rollup - Classic Edition:** If the List Rollup was created using the **Bamboo List Rollup Classic Edition Web Part**, enter the page where the List Rollup Data View resides. You can enter the page URL as a static URL (<http://domain/site/default.aspx>) or a relative URL ([./site/default.aspx](http://site/default.aspx)). **Note:** Relative URLs should be used for SharePoint Web applications containing multiple Alternative Access Mappings (AAM) or if the Web Part is part of a site template.
 - **List Rollup Web Part:** If the List Rollup was created using the **Bamboo List Rollup Schema Designer** Web Part, enter the path to the site where the Bamboo List Rollup Schema Designer Web Part resides. You can enter the site URL as a static URL (<http://domain/site>) or a relative URL ([./site](http://site)). **Note:** Relative URLs should be used for SharePoint Web applications containing multiple Alternative Access Mappings (AAM) or if the Web Part is part of a site template.
 - **Master List:** Select the List Rollup Data View or List Rollup Schema you want to display in the Data-Viewer Web Part.



- **MashPoint/BDC:** Select this option to connect to legacy data using the Microsoft Business Connectivity Services (BCS).

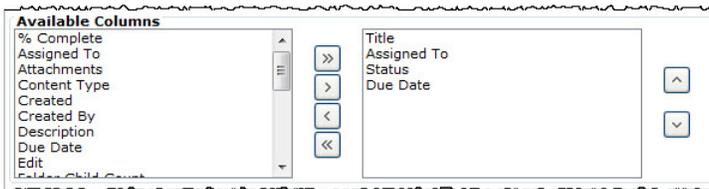


[TOP](#)

Available Columns (Required)

Once you have selected your data source, you must select the columns you want displayed in the Data-Viewer Web Part.

- Select the columns you want to display in the **Available Columns** list on the left and click the > button to add them to the display column list on the right. Hold down the SHIFT or CTRL key to select and move more than one column.
- To add all columns to the displayed columns list, click the >> button.
- To remove a column from the list of displayed columns, select the column or columns to remove and click the < button.
- To remove all columns, click the << button.
- To reorder the displayed columns, select a column and click the up or down arrows.

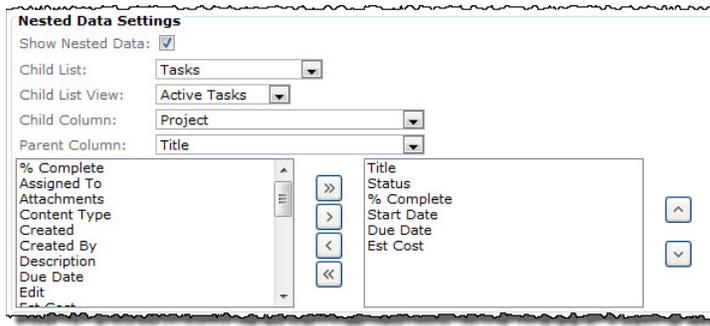


[TOP](#)

Nested Data Settings (Optional)

Nested Data Settings allow you to display child data connected to the master data source. The nested data must exist in the same location as the master data source and be the same data source type.

- **Nested Data Settings for SharePoint List data sources:**
 - **Show Nested Data:** Select this check box to show nested SharePoint List data in the Data-Viewer Web Part.
 - **Child List:** Select the child SharePoint List you want to display.
 - **Child List View:** Select an available list view to apply filter settings configured for the selected list or library.
 - **Child Column:** Select the column in the child list that has data that matches the data in the Parent Column field. This creates a link between the two data sets that enables you to view the nested data in the Data-Viewer Web Part. The Child Column must be the same column data type as the Parent Column.
 - **Parent Column:** Select the column from the parent (i.e. master) list that has data that matches the data in the Child Column field. This creates a link between the two data sets that enables you to view the nested data in the Data-Viewer Web Part. The Parent Column must be the same column data type as the Child Column.
 - **Child List Available Columns:** Select the child list columns that you want to display in the Data-Viewer Web Part. These columns are displayed directly beneath the master list row in the Web Part. Read [Using the Data-Viewer Web Part](#) for more information on using the nested data display features.



- **Nested Data Settings** for **List Rollup** data sources:
 - **Show Nested Data:** Select this check box to show nested List Rollup data in the Data-Viewer Web Part.
 - **Child List:** Select the child List Rollup data view you want to display.
 - **Child Column:** Select the column in the child list that has data that matches the data in the Parent Column field. This creates a link between the two data sets that enables you to view the nested data in the Data-Viewer Web Part.
 - **Parent Column:** Select the column from the parent (i.e. master) list that has data that matches the data in the Child Column field. This creates a link between the two data sets that enables you to view the nested data in the Data-Viewer Web Part.
 - **Child List Available Columns:** Select the child list columns that you want to display in the Data-Viewer Web Part. These columns are displayed directly beneath the master list row in the Web Part. Read [Using the Data-Viewer Web Part](#) for more information on using the nested data display features.

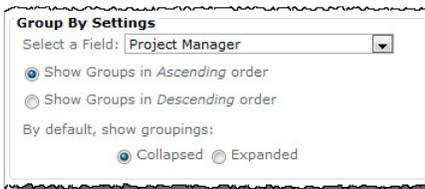
- **Nested Data Settings** for **SQL Server** data sources:
 - **Show Nested Data:** Select this check box to show nested SQL Server data in the Data-Viewer Web Part.
 - **Child Table:** Select the child SQL table you want to display.
 - **Child Column:** Select the column in the child list that has data that matches the data in the Parent Column field. This creates a link between the two tables that enables you to view the nested data in the Data-Viewer Web Part.
 - **Parent Column:** Select the column from the parent (i.e. master) list that has data that matches the data in the Child Column field. This creates a link between the two tables that enables you to view the nested data in the Data-Viewer Web Part.
 - **Child Table Available Columns:** Select the child list columns that you want to display in the Data-Viewer Web Part. These columns are displayed directly beneath the master list row in the Web Part. Read [Using the Data-Viewer Web Part](#) for more information on using the nested data display features.

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Group By Settings (Optional)

Use Group By Settings to group data in the Data-Viewer Web Part by a selected column or field.

- **Select a Field:** Select a column or field to group the data by in the Data-Viewer Web Part.
- **Show Groups in Ascending/Descending Order:** Select a sort option for the grouped data.
- **By default, show groupings Collapsed or Expanded:** Select whether to expand or collapse groups by default.

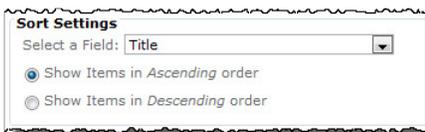


[TOP](#)

Sort Settings (Optional)

Use Sort Settings to sort data in the Data-Viewer Web Part by a selected column or field.

- **Select a Field:** Select a column or field to sort the data by in the Data-Viewer Web Part.
- **Show Items in Ascending/Descending Order:** Select a sort option.



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Filter Settings (Optional)

Under **Filter Settings**, select the **Use Filter** option to filter the data displayed in the Data-Viewer Web Part.

- **Show items when:** Select the column or field to filter by, select the comparison operator (i.e. **is equal to**), and then enter the value to filter on. The filter value can include the SharePoint variable **[Me]** to match the currently logged on user or **[Today]** to match the current date.
- **Show more filter fields:** Click this link to filter by more than one criteria using **AND/OR** logic.

To use a list view, select the **Use List View** option.

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Conditional Formatting Settings (Optional)

You can apply conditional formatting to master data and nested data using the options described below. **Note:** See the [limitations](#) listed below.

- **Master Data Formatting and Nested Data Formatting:** The **Master Data Formatting** section is always available and allows you to apply conditional formatting to data in your data source. The **Nested Data Formatting** section is only available if you have [nested data](#) configured for a data source.
- **Format Items When:** Select the column and a comparison operator, and then enter the value to match. The filter value can include the SharePoint variable **[Me]** to match the currently logged on user or **[Today]** to match the current date.
- **Format Preview:** Click the Format Preview box to set formatting options. You can set font color (foreground), background color, underlining, font size, alignment, and other options.
- **Apply background color to entire row:** Select this check box to apply the background color to the entire row instead of only the cell that contains the format criteria.
- **Add another conditional format:** Click this link to add another condition.

Conditional Formatting Limitations

When applying Conditional Formatting, keep in mind the following limitations:

- Changes to the font color (foreground color) cannot be applied to linked items, such as **Person or Group** column types, the **Lookup** column type, and the **Title** column with the "linked to item" or "linked to item with edit menu" attribute.
- No formatting is applied to **Lookup** columns that allow multiple values.
- When applying a background color to a **Title** column, use the Title column with "linked to item with edit menu".
- When configuring conditional formatting condition using the **% Complete** column, enter the condition value as a whole number (i.e. 25 for 25% or 10 for 10%).

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Calculated Settings (Optional)

The Data-Viewer Web Part can display count, sum, average, max, or min calculated values for any column in the master or child data set.

- **Parent Grid Settings and Child Grid Settings:** The **Parent Grid Settings** section is always available and allows you to apply a calculation to a column in your data source. The **Child Grid Settings** section is only available if you have [nested data](#) configured for a data source.
- **Select a column to perform calculation:** Select a column from the drop-down box.
- **Operator:** Select an operator from the drop-down box. The list of available operators may vary depending on the data type of the column selected.
- **Operator Label:** Type in a descriptive label to display in front of the calculated value.
- **Display result location:** Select a location to display the calculated value and its label.
- **Click below to format the result:** Click the formatting box to set formatting options for the calculated value. You can set font color (foreground), background color, underlining, font size, alignment, and other options.
- **Add another calculated column:** Click this link to add another calculated column.

Calculated Settings

Parent Grid Settings
 Select a column to perform calculation
 Budget
 Operator: Sum
 Operator Label: Cost of All Projects:
 Display result location
 Below the column header
 Bottom of the grid
 Click below to format the result
 TEXT PREVIEW
 Add another calculated column...

Child Grid Settings
 Select a column to perform calculation
 Est Cost
 Operator: Sum
 Operator Label: Project Cost To Date:
 Display result location
 Below the column header
 Bottom of the grid
 Click below to format the result
 TEXT PREVIEW
 Add another calculated column...

[TOP](#)

Dynamic Settings (Optional)

Select Dynamic Settings options for users of the Data-Viewer Web Part. For more information about using Dynamic Settings options, read [Using the Data-Viewer Web Part](#). **Note:** See the [limitations](#) listed below.

- **Allow Filtering:** Allows users to filter items displayed in the Data-Viewer Web Part by entering values in the filter text boxes.
- **Allow Group By:** Allows users to group items displayed in the Data-Viewer Web Part by dragging and dropping a column heading to the bar just above the column heading bar. **Note:** The Allow Group By feature only applies to the master list column headings. You cannot group data by child list column headings.
- **Allow Sorting:** Allows users to click a column heading to sort items displayed in the Data-Viewer Web Part. Clicking the column heading cycles sort order between ascending, descending, and no sort.
- **Allow Inline Editing:** Enables the **Bamboo Edit** column which adds an Edit icon for each row of data. Click the Edit icon to edit the selected row directly in the Data-Viewer Web Part interface.
- **Allow Edit in Datasheet:** Enables the **Edit in Datasheet** button in the action bar of the Data-Viewer Web Part. When users click this button, the default Data-Viewer Web Part view is replaced with a grid view similar to SharePoint Datasheet mode. This allows users to make multiple edits quickly. For important usage information about this feature, read its section in [Using the Data-Viewer Web Part](#).
- **Allow Add New Item:** Enables the **Add New Item** link at the top of the Data-Viewer Web Part. This option is only available for the SharePoint list or library data sources. Click the **Add New Item** link to enter a new item.

Dynamic Settings

Allow Filtering
 Allow Group By
 Allow Sorting
 Allow Inline Editing
 Allow Edit In Data Sheet
 Allow add new item

Dynamic Settings Limitations

The following limitations apply to Dynamic Settings:

Group By

- If you group by more than 2 columns, all items are shown under the last grouping node.
- Column names in the Group By bar on the Data-Viewer Web Part interface are unreadable when using the **Web20** skin.

Filter

- You can only filter by one column at a time.
- Dynamic filtering cannot be performed on the following column types:
 - Calculated
 - Lookup
 - % Complete
 - Person or Group
 - Date and Time
 - Hyperlink or Picture

Sort

- When sorting on a Number or Currency data type, the data is sorted as a string data type.

Inline Editing

- The Inline Edit form does not currently support the following column types:
 - Lookup with multiple values

- o Calculated
- o Multiple Lines of Text

These items are not displayed in the Inline Edit form.

Edit in Data Sheet

- **Multiple lines of text** columns configured as **Rich text** or **Enhanced rich text** are displayed as plain-text fields with HTML markup in Datasheet mode.
- Values for **Lookup, Choice** columns configured as **Checkboxes (allow multiple selections)**, and **Person or Group** columns are displayed with hash values in Datasheet mode.

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Export Settings (Optional)

Export Settings allow users to export parent and child data from the Data-Viewer Web Part to Microsoft Excel. **Note:** See the [limitations](#) listed below.

- **Allow Export to Excel:** Enables the **Master Grid Excel Report Export** button to export data from the master data source to Microsoft Excel. If nested child data is configured, the **Hierarchy Grid Excel Export** button is also displayed, and will export child data to a separate Microsoft Excel workbook.
- **Allow Export to MS Project:** This feature is only available with the MS Project Integration Web Part in SharePoint Project Management Central.



Export Settings Limitations

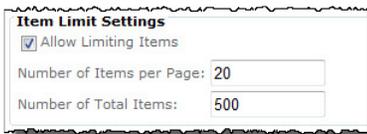
- The exported Excel file doesn't retain [conditional formatting](#) colors applied in the Data-Viewer Web Part.
- The export function cannot export master and child data to the same Excel workbook. You must export them to separate workbooks.

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Item Limit Settings (Optional)

Use the Item Limit Settings to set a limit for the number of items displayed per page and the total number of items the Data-Viewer Web Part can display.

- **Allow Limiting Items:** Select this check box to enable limiting items.
- **Number of Items per Page:** Enter the number of items to display per page.
- **Number of Total Items:** Enter the total number of items that can be displayed.

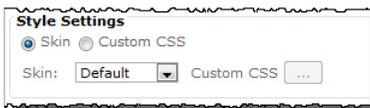


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Style Settings (Optional)

Use Style Settings to configure the look and feel of the Data-Viewer Web Part.

- **Skin:** Select from twelve different skins with different color and style themes.
- **Custom CSS:** Select this option to customize the CSS for the Web Part directly. Click the **Custom CSS** button to display a window where you can edit the CSS. Read [Styling the Web Part](#) for more information.



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Language Settings (Optional)

To localize the Data-Viewer Web Part user interface and tool pane settings for your language, follow the instructions provided in [Localizing the Data-Viewer Web Part](#) and then select the appropriate language file in the **Language Settings** box.

NOTE: The translation options for Spanish, French, German and English are all in English when the product is installed. You must customize the files to translate the Web Part user interface to the language you require. See [Localizing the Data-Viewer Web Part](#) for more information.

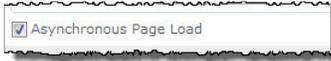


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Asynchronous Page Load (Optional)

Asynchronous page load allows other elements of the SharePoint page to be displayed before the Data-Viewer Web Part finishes loading. If this option is enabled, the page will load first, followed by the Web Part. If this option is not enabled, the SharePoint page will not be displayed until the Data-Viewer Web Part data finishes loading.

Check the box to enable the Asynchronous Page Load feature.



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Saving the Data-Viewer Web Part Configuration (Required)

Click **Apply** and then **OK** when you have finished configuring the Data-Viewer Web Part. Data will be displayed in the Web Part according to the settings you configured.

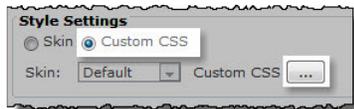
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Styling the Data-Viewer Web Part

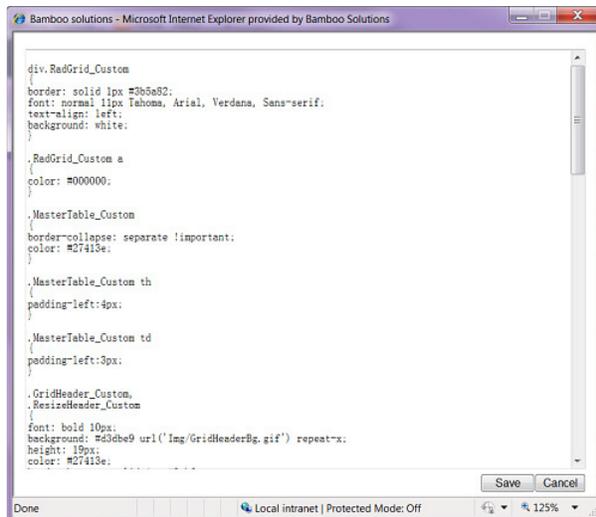
By default, the Data-Viewer Web Part renders the user interface using the default CSS styles that are selected in your SharePoint sites. The look and feel of the Web Part can be further customized by editing the custom CSS file in the tool pane of the Web Part.

To customize the style of the Data-Viewer Web Part:

1. Edit the Web Part to open the tool pane. Under **Style Settings**, select the **Custom CSS** option, then click  next to **Custom CSS**.



2. The text editor opens in a new window and displays the default CSS styles. Make your desired changes.



3. Click **Save** to save your changes.

For additional information, click the links below:

- [Data-Viewer Web Part Class Selectors](#)
- [Default Data-Viewer Web Part CSS](#)
- [Additional References](#)

Data-Viewer Web Part Class Selectors

The Data-Viewer Web Part uses the following class selectors to define each element of the Web Part:

Data Grid (entire grid)

CustomerID	CompanyName	ContactName	ContactTitle	Address
ANHTH	Anh Thi Co.ltd	Jean Hook	Sales Agent	20 Le Trong Tuyen
ANHVI	Anh Viet Co.ltd	ANH Duc	Provider	15 Tay Son
CENTC	Dai Thanh Co.ltd	Tom Cruise	Provider	06 Tay Son
DENHAT	De Nhat Co.ltd	Hong Jue	Sales Agent	06 Street
DUYHA	Duyun Hai Co.ltd	Brown Pull	Provider	25 Tran Hung Dao

Css code:

```

div.RadGrid_Custom
{
border: solid 1px #3b5a82;
font: normal 11px Tahoma, Arial, Verdana, Sans-serif;
text-align: left;
background: black;
}

```

Table Contents and Border

CustomerID	CompanyName	ContactName	ContactTitle	Address
ANHTH	Anh Thi Co.ltd	Jean Hook	Sales Agent	20 Le Trong Tuyen
ANHVI	Anh Viet Co.ltd	ANH Duc	Provider	15 Tay Son
CENTC	Dai Thanh Co.ltd	Tom Cruise	Provider	06 Tay Son
DENHAT	De Nhat Co.ltd	Hong Jue	Sales Agent	06 Street
DUYHA	Duyun Hai Co.ltd	Brown Pull	Provider	25 Tran Hung Dao

Css code:

```

.MasterTable_Custom
{
border-collapse: separate !important;
color: #1243ee;
}

```

Rows and Alternating Rows

CustomerID	CompanyName	ContactName	ContactTitle
PHOCA	Hoang Phuong Co.ltd	Jean Hook	Provider
THAVI	Thanh Vi Co.ltd	Miss Thien	Provider
THIHA	Thien Ha Co.ltd	Jan Cook	Marketing Manager
TIDAT	Tien Dat Co.ltd	Jan Cook	Provider

Css code:

```

.GridRow_Custom
{
background: transparent;
height: 19px;
}

.GridAltRow_Custom
{
background: #F0FFFF;
height: 19px;
}

```

Selected Editing Row

CustomerID	CompanyName	ContactName	ContactTitle	Address
FAMIA	Familia Argubaldo	Ania Cruz	Sales Agent	72 Tran Hung Dao
HAHIA	Cong ty loi .ltd	Brown Pull	Sales Agent	25 Tran Hung Dao
manot	ngay thang	nao	nho	neu mot ngay
MYTAI	My Tai Co.ltd	Hong Jue	Provider	06 Street
NOKIA	NOKIA Agent Co.ltd	Miss Ha	Marketing Manager	34 Street

Css code:

```

.GridEditRow_Custom
{
background: #20B2AA;
}

```

Group Header

CustomerID	CompanyName	ContactName	ContactTitle	Address
Address: 15 Tay Son				
ANHVI	Anh Viet Co.,Ltd	ANH duc	Provider	15 Tay Son
Address: 20 Le Trong Tuyen				
ANHTH	Anh Thi Co.,Ltd	Jean Hook	Sales Agent	20 Le Trong Tuyen
PHOCA	Hoang Phuong Co.,Ltd	Jean Hook	Provider	20 Le Trong Tuyen
Address: 25 Tran Hung Dao				
DUYHA	Duyen Hai Co.,Ltd	Brown Pull	Provider	25 Tran Hung Dao
HAIHA	Cong ty loi .Ltd	Brown Pull	Sales Agent	25 Tran Hung Dao

Css code:
tr.GroupHeader_Custom
{
background: #6495ED;
height: 22px;
}

Footer Bar

CustomerID	CompanyName	ContactName	ContactTitle	Address
ANHVI	Anh Viet Co.,Ltd	ANH duc	Provider	15 Tay Son
ANHTH	Anh Thi Co.,Ltd	Jean Hook	Sales Agent	20 Le Trong Tuyen
PHOCA	Hoang Phuong Co.,Ltd	Jean Hook	Provider	20 Le Trong Tuyen
DUYHA	Duyen Hai Co.,Ltd	Brown Pull	Provider	25 Tran Hung Dao
HAIHA	Cong ty loi .Ltd	Brown Pull	Sales Agent	25 Tran Hung Dao

Css code:
.GridPager_Custom
{
background: #7CFC00 url('Img/GrPagerBg.gif') repeat-x;
height: 15px;
color: white;
}

Filter Row

CustomerID	CompanyName	ContactName	ContactTitle
ANHTH	Anh Thi Co.,Ltd	Jean Hook	Sales Agent
ANHVI	Anh Viet Co.,Ltd	ANH duc	Provider
CENTC	Dai Thanh Co.,Ltd	Tom Cruise	Provider
DENHAT	De Nhat Co.,Ltd	Hong Jue	Sales Agent
DUYHA	Duyen Hai Co.,Ltd	Brown Pull	Provider

Css code:
.GridFilterRow_Custom
{
background: #00FF7F;
}

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Default Data-Viewer Web Part CSS

The default CSS for the Data-Viewer Web Part is listed below:

```
div.RadGrid_Custom
{
border: solid 1px #3b5a82;
font: normal 11px Tahoma, Arial, Verdana, Sans-serif;
text-align: left;
background: white;
}

.RadGrid_Custom a
{
color: #000000;
}

.MasterTable_Custom
{
border-collapse: separate !important;
color: #27413e;
}

.MasterTable_Custom th
{
padding-left:4px;
}

.MasterTable_Custom td
{
padding-left:3px;
}
```

```

.GridHeader_Custom,
.ResizeHeader_Custom
{
font: bold 10px;
background: #d3dbe9 url('Img/GridHeaderBg.gif') repeat-x;
height: 19px;
color: #27413e;
border-bottom: solid 1px #9eb6ce;
}

.GridHeader_Custom a
{
color: #27413e;
text-decoration: none;
}

.GridRow_Custom,
.GridAltRow_Custom
{
background: transparent;
height: 19px;
}

.GridRow_Custom td,
.GridAltRow_Custom td,
.GridEditRow_Custom td
{
border-right: solid 1px #d0d7e5;
border-bottom: solid 1px #d0d7e5;
}

.GridEditRow_Custom
{
background: #fffef1;
}

.GridEditRow_Custom input
{
font-size: 11px;
}

.GridPager_Custom
{
background: #9ab5db url('Img/GriPagerBg.gif') repeat-x;
height: 15px;
color: white;
}

.GridFooter_Custom
{
background: #fbfbfb;
height: 19px;
color: #666;
}

.GridFooter_Custom td
{
border: solid 1px #fbfbfb;
border-top: 1px solid #637783;
padding: 0 4px;
}

.GridFooter_Custom td a
{
color: #666;
}

.GridPager_Custom td a
{
color: #ffffff;
}

.GridPager_Custom td a:hover,
.GridFooter_Custom td a:hover
{
color: #000000;
}

tr.GroupHeader_Custom
{
background: #e4ecf7;
height: 22px;
}

td.GridHeader_Custom input
{
width: auto;
float: left;
border: solid 1px #3b5a82;
background: #fafafa;
font: bold 10px Verdana, Arial, Sans-serif;
color: #989cb0;
height: 14px;
vertical-align: middle;
}

```

```
.GridFilterRow_Custom
{
background: blue;
}
```

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Additional References

For additional information and CSS examples, visit http://www.w3schools.com/css/css_reference.asp.

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Localizing Bamboo Products

Bamboo products can display user interface and tool pane text in your local language. To change the language a product displays, perform the steps described below. Click a link below for detailed information about each step.

1. [Customize a language file.](#)
2. [Select the customized language file in the product configuration.](#)

Customizing Language Files

There are four language files included with Bamboo products:

- 1031.German.xml
- 1033.English.xml
- 1034.Spanish.xml
- 1036.French.xml

These files are located in the **wpresources** folder. This folder may be located under the following paths:

- \\servername\drive\Inetpub\wwwroot\wss\VirtualDirectories\port\wpresources\[Product]
- \\servername\drive\Program Files\Common Files\Microsoft Shared\web server extensions\wpresources\[Product]

The German, Spanish and French files have not yet been translated; they are still in English. Edit these files directly to provide your own translation of the product user interface and tool pane text. To make sure that these files are not overwritten when you upgrade the product, copy the default file for the language you want to the **wpresources** folder and rename it, for example: *CompanyName.1036.French.xml*. If you do not rename the files you modify, these files will be overwritten when the product is upgraded.

To create language files for languages other than German, English, Spanish, or French, copy one of the existing language files and rename it. Then edit the file to provide your own translation.

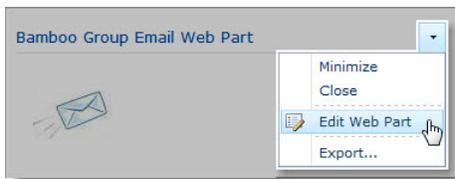
The installation program will not remove or overwrite translation files you have created if they are named differently from the default resource files included with the product. However, product upgrades may require that you modify custom translation files to include new resource strings that were added for the new product version. The product will display the missing resource string IDs after an upgrade is completed. Copy these resource string IDs from a default language file to your custom translation file and make the appropriate changes for your language.

Selecting a New Language File for a Product

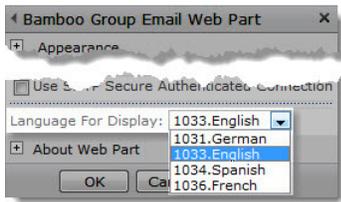
The instructions below for changing language file settings apply to Bamboo products with settings configured in the [Web Part tool pane](#) or Web Part Settings [pop-up page](#).

Changing Language Settings in the Web Part Tool Pane

1. Click the edit drop-down arrow on the Web Part title bar and select **Edit Web Part**.



2. In the **Language** settings section of the Web Part tool pane, select the language file you want to use.



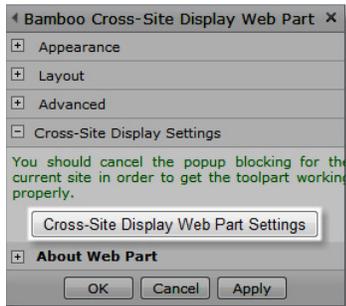
3. Click **Apply** and then **OK** in the Web Part tool pane to apply your changes.

Changing Language Settings in the Web Part Settings Pop-up Page

1. From the Web Part, click the edit drop-down arrow on the Web Part title bar and select **Modify Shared Web Part**.



2. Click the **[Product] Settings** button in the Web Part tool pane.



3. Click **Language Settings** in the Web Part Settings page and select the language file you want to use.



4. Click the **Save & Close** button to save the Web Part settings.
5. Click **Apply** and then **OK** in the Web Part tool pane to apply your changes.

Using the Data-Viewer Web Part

The example below shows a Data-Viewer Web Part [configured](#) to display data from a SharePoint list, without other dynamic or conditional formatting:

Bamboo Data-Viewer Web Part

Title	Priority	Status	% Complete	Project Manager	Due Date	Budget
Apollo	(2) Normal	In Progress	90 %	Lucy Wu	3/31/2011	\$60,000
Phoenix	(1) High	In Progress	50 %	Lucy Wu	5/26/2011	\$150,000

[Back](#) | [Next](#)

For examples of using other Data-Viewer Web Part features, click the links below.

- [Using group, filter, sort, and export options](#)
- [Inline editing](#)
- [Adding new items](#)
- [Editing in Datasheet view](#)
- [Working with nested data](#)

Using group, filter, sort, and export options

If the Web Part is configured to allow users to dynamically group, filter, sort, and export data, the following additional functionality is added to the Web Part:

Bamboo Data-Viewer Web Part

Drag a column header and drop it here to group by that column

Title	Priority	Status	% Complete	Project Manager	Due Date	Budget
> Apollo	(2) Normal	In Progress	90 %	Lucy Wu	3/31/2011	\$60,000
> Phoenix	(1) High	In Progress	50 %	Lucy Wu	5/26/2011	\$150,000

Back | Next

Master Grid Excel Export

Group By

Drag and drop column headings to the bar at the top of the Web Part to group the data. Drag as many columns as you want to display sub-groups of data.

Sort

Click the column headings to sort ascending, descending, or not sort at all. In the example above, sorting is applied to the **Assigned To**. You can sort data in both parent and child data sets. (**Note:** You cannot sort by **Assigned To** if the data source is a List Rollup.)

Filter

Filter data by entering a value in the filter text box displayed at the top of each column. Enter the filter value for a column, and then click the Filter icon. Select from a list of comparison operators such as equal to, contains, starts with, etc. If you want to change the filter for the data set, enter a new filter value in the same or another column. Only one filter can be applied to a data set at a time. To remove a filter, click the filter icon and select **No Filter**.

Export to Excel

Export your master and child data to Microsoft Excel by clicking the **Master Grid Excel Export** button (to export master data) or the **Hierarchy Grid Excel Export** button (to export child data). The Hierarchy Grid Excel Export button will only be available if nested data is displayed in the Web Part.

[TOP](#)

Inline Editing

If the **Allow Inline Editing** option is enabled for the Data-Viewer Web Part, a Bamboo Edit column is added as the first column in the view. Click the **Edit** icon to edit master data directly in the Data-Viewer Web Part, as shown in the example below.

Note: To edit Person or Group column types, type the name of the person to search for and click the magnifying glass icon.

Bamboo Data-Viewer Web Part

Edit	Title	Priority	Status	% Complete	Project Manager	Due Date	Budget
>	Apollo	(2) Normal	In Progress	90 %	Lucy Wu	3/31/2011	\$60,000
>	Phoenix	(1) High	In Progress	50 %	Lucy Wu	5/26/2011	\$150,000

Title * Phoenix

Priority (1) High

Status In Progress

% Complete 50 %

Project Manager Lucy Wu

Due Date 5/26/2011

Budget 150000

Update Cancel

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Adding New Items

If the **Allow Add New Item** option is enabled for the Data-Viewer Web Part, the **Add New Item** button is displayed at the top of the Data-Viewer Web Part. Click this button to enter in new item information in the New Item pop-up form.

Note: This option is available only for SharePoint list and library data sources.

Bamboo Data-Viewer Web Part

Add New Item Edit In Datasheet

Edit	Title	Priority	Status	% Complete
	Apollo	(2) Normal	In Progress	90 %
	Phoenix	(1) High	In Progress	50 %

Back | Next

Projects - New Item

Add New Item Pop-Up Form

Edit

Save Cancel Paste Cut Copy Attach File Spelling

Commit Clipboard Actions Spelling

Title *

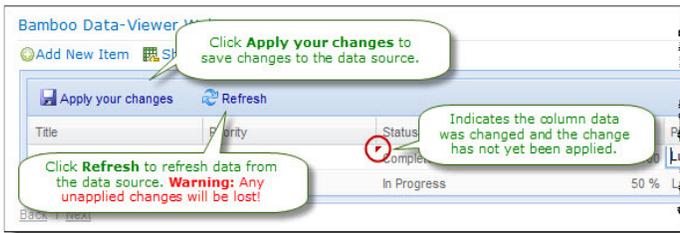
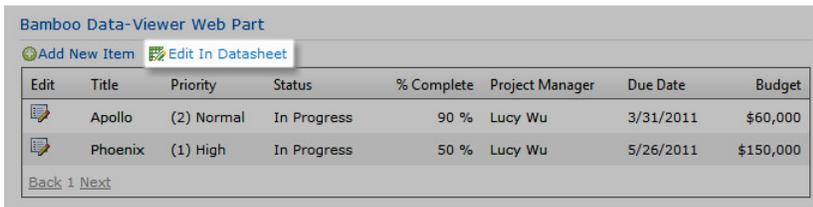
Priority (2) Normal

[TOP](#)

Editing in Datasheet View

The Data-Viewer Web Part includes a Datasheet view mode to allow quick edits to multiple items. If the **Allow Edit in Data Sheet** option is enabled, the **Edit in Datasheet** button is displayed at the top of the Web Part. Click this button to switch to Datasheet mode, which replaces the default Web Part view with a grid view similar to SharePoint Datasheet mode.

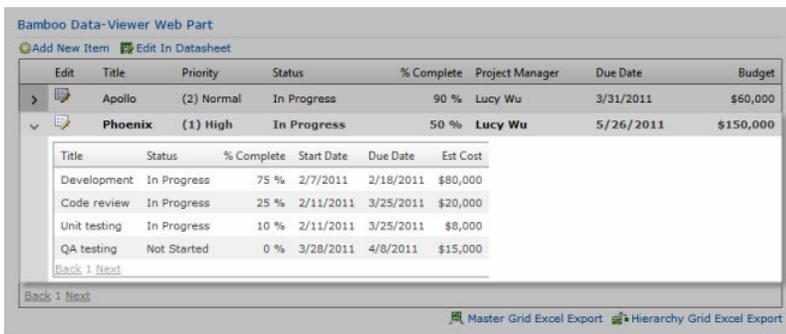
- To edit a column, click on it and make your changes. Updated columns will be marked with a red triangle in the upper left corner. This indicates that there are changes that have not yet been saved to the data source.
- When you are finished making changes, click the **Apply your changes** button at the top of the datasheet to save changes to the data source. **Important:** CHANGES WILL NOT BE SAVED until you click **Apply your changes**.
- To refresh data with any changes that may have been made in the data source, click the **Refresh** button at the top of the datasheet. **Note:** Any updates that were not applied before refreshing will be lost.
- To return to the default Data-Viewer Web Part view, click the **Show in Standard View** button at the top of the Web Part. **Note:** Any updates that were not applied before changing views will be lost.
- Some column types may display with additional markup. Always use the edit features to the right of the value to select or search for new values when changing these columns. For a list of columns affected, read the Dynamic Settings section in [Configuring the Data-Viewer Web Part](#).



[TOP](#)

Working with Nested Data

The example below shows a Data-Viewer Web Part configured to display nested (child) data:



- To expand child data for an item in the master data list, click the **+** to the left of the item. To collapse child data, click the **-**.
- When configuring nested data options, you have the ability to include the SharePoint column **Title (linked to item with edit menu)**. If you display this column, clicking the Title link in either the master or child data will allow you to edit the item.
- Conditional formatting and calculations can be configured for nested data. An example of these is shown below:

Bamboo Data-Viewer Web Part

[Add New Item](#) [Edit In Datasheet](#)

Edit	Title	Priority	Status	% Complete	Project Manager	Due Date	Budget																														
							TOTAL PROJECT \$: \$210,000.00																														
>	Apollo	(2) Normal	In Progress	90 %	Lucy Wu	3/31/2011	\$60,000																														
>	Phoenix	(1) High	In Progress	50 %	Lucy Wu	5/26/2011	\$150,000																														
							PROJECT COST: \$123,000.00																														
<table border="1"> <thead> <tr> <th>Title</th> <th>Status</th> <th>% Complete</th> <th>Start Date</th> <th>Due Date</th> <th>Est Cost</th> </tr> </thead> <tbody> <tr> <td>Development</td> <td>In Progress</td> <td>75 %</td> <td>2/7/2011</td> <td>2/18/2011</td> <td>\$80,000</td> </tr> <tr> <td>Code review</td> <td>In Progress</td> <td>25 %</td> <td>2/11/2011</td> <td>3/25/2011</td> <td>\$20,000</td> </tr> <tr> <td>Unit testing</td> <td>In Progress</td> <td>10 %</td> <td>2/11/2011</td> <td>3/25/2011</td> <td>\$8,000</td> </tr> <tr> <td>QA testing</td> <td>Not Started</td> <td>0 %</td> <td>3/28/2011</td> <td>4/8/2011</td> <td>\$15,000</td> </tr> </tbody> </table>								Title	Status	% Complete	Start Date	Due Date	Est Cost	Development	In Progress	75 %	2/7/2011	2/18/2011	\$80,000	Code review	In Progress	25 %	2/11/2011	3/25/2011	\$20,000	Unit testing	In Progress	10 %	2/11/2011	3/25/2011	\$8,000	QA testing	Not Started	0 %	3/28/2011	4/8/2011	\$15,000
Title	Status	% Complete	Start Date	Due Date	Est Cost																																
Development	In Progress	75 %	2/7/2011	2/18/2011	\$80,000																																
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Unit testing	In Progress	10 %	2/11/2011	3/25/2011	\$8,000																																
QA testing	Not Started	0 %	3/28/2011	4/8/2011	\$15,000																																
Back Next																																					
Back Next																																					
Master Grid Excel Export Hierarchy Grid Excel Export																																					

[TOP](#)

About Licensing

For trials, no license key is required. For more information on our licensing, refer to <http://store.bamboosolutions.com/BambooMainWeb/FAQ.aspx>.

Once purchased, the product licensing is controlled through a separate license key and activation program **installed on the server where SharePoint Central Administration is installed**. To license Bamboo products, you must:

1. Install the Bamboo Web License Manager on the SharePoint server where SharePoint Central Administration is installed (just install one time - not for each product that you install).
2. From Bamboo Web License Manager, locate the product you want to activate, enter in your license key(s) and activate the product on the servers where you want the product to run - all from one place. You can activate the license online or via email.

You can also check the licensing status of Bamboo products you installed to determine whether a product trial will soon expire or whether the product has been deactivated or not.

You must be a machine and SharePoint Farm administrator to install and run the Bamboo Web License Manager.

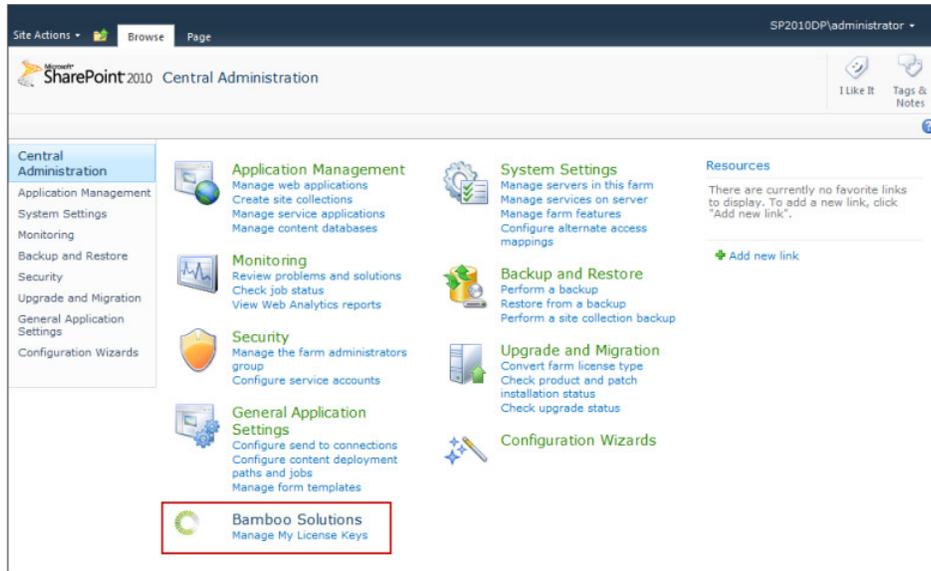
Installing the Bamboo Web License Manager

1. On the server where SharePoint Central Administration is installed, then from the Setup program screen, click the **Bamboo Web License Manager** component button, then click **Install**.
2. Read the End-User License Agreement and choose to accept or abort the install.
3. Click **Next** to continue.
4. The program performs some system checks to determine whether your server is ready for installation. Click **Next** to continue.
5. The program is restricted to only install the Bamboo Web License Manager on the server where it detects the SharePoint Central Administration has been installed. This web application should already be selected for you as well as the Automatically activate features check box. Click **Next** to continue.
6. The Bamboo Web License Manager is then installed on the server. Click **Next** to view a details screen of the installation.
7. Click **Close**.

Note: If you encounter any issues with the installation, please reference our [Knowledge Base](#) for help and troubleshooting.

Licensing and Activating the Web Part

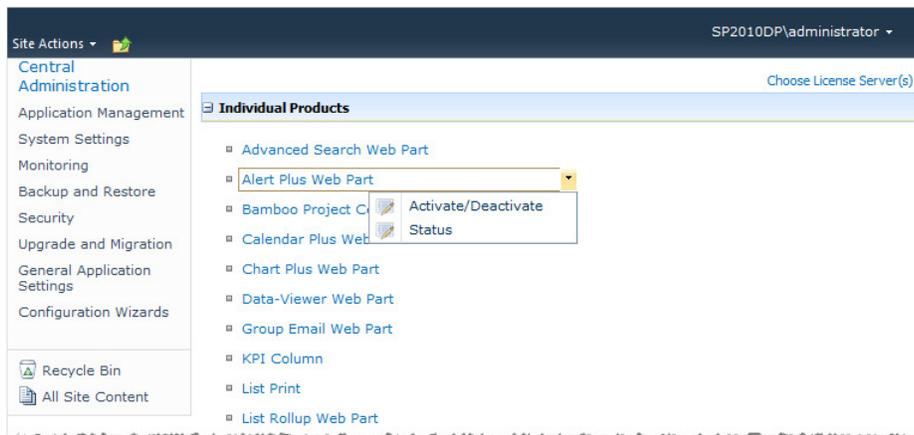
1. Open SharePoint Central Administration (make sure you have the proper access rights to log in). Notice the Bamboo Solutions heading at the bottom of the page.



2. Under the **Bamboo Solutions** section, click **Manage My License Keys**.

Note: If you have not yet installed any Bamboo products, the Web License Manager will not show any products. If you have installed Bamboo products that support the new Web Licensing Manager *prior* to installing the Bamboo Web License Manager, you will need to uninstall those Bamboo products and reinstall them in order to manage them in the Bamboo Web License Manager. This is optional. Your licensed Bamboo products will continue to run regardless of whether they show in the Web License Manager.

3. Expand the **Individual Products** section or the **Suites** section (depending on the product/suite you want to license), locate your product, and click the product name to view the license status or click the drop-down arrow to **Activate/Deactivate** or view the **Status**.



4. Do one of the following:
 - If you want to activate the product without viewing the status, click **Activate/Deactivate** from the drop-down (see screenshot above).
 - If you choose to view the licensing Status, then click the status to activate or deactivate the license.

Site Actions SP2010DP\administrator

Central Administration > Bamboo Web License Manager
Status Page - Alert Plus Web Part

I Like It Tags & Notes

Central Administration

Application Management

System Settings

Monitoring

Backup and Restore

Security

Upgrade and Migration

General Application Settings

Configuration Wizards

Recycle Bin

All Site Content

This page shows license status for the Alert Plus Web Part.

SP2010DP	
Status	Trial
Start Date	6/23/2010 12:28:11 AM
End Date	6/24/2010 12:28:11 AM

5. Do one of the following:

- To activate online, type or copy and paste the license key into the field provided and click **Activate**.

Site Actions SP2010DP\administrator

Central Administration > Bamboo Web License Manager
Activation Page - Alert Plus Web Part

I Like It Tags & Notes

Central Administration

Application Management

System Settings

Monitoring

Backup and Restore

Security

Upgrade and Migration

General Application Settings

Configuration Wizards

Recycle Bin

All Site Content

This page allows you to activate and deactivate a purchased copy of the Alert Plus Web Part. Please select the server to activate/deactivate.

Server	Status
<input checked="" type="radio"/> SP2010DP	Trial

License Key:

Activate by E-mail

- To activate by email, enter the license key and select the **Activate by E-mail** check box, then click **Activate**.

Site Actions SP2010DP\administrator

Central Administration > Bamboo Web License Manager
Offline Activation - Alert Plus Web Part

I Like It Tags & Notes

Central Administration

Application Management

System Settings

Monitoring

Backup and Restore

Security

Upgrade and Migration

General Application Settings

Configuration Wizards

Recycle Bin

All Site Content

To activate by offline, please send Bamboo Solutions Customer Support Team the License Key and Machine key listed below to support@bamboosolutions.com. A Support Representative will send the appropriate Activation Key to be entered below.

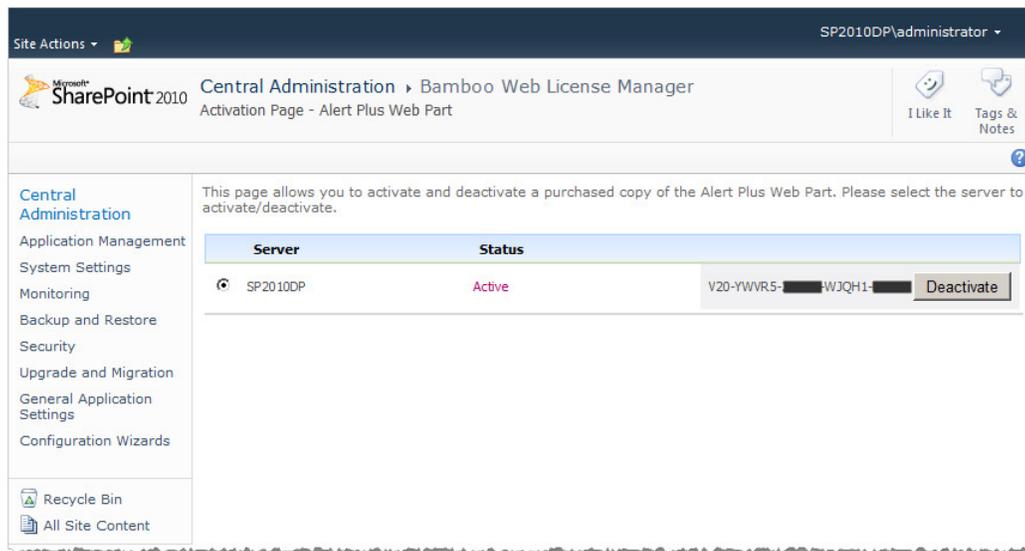
License Key V20-YWVR5-██████-WJQH1-██████

Machine Key 41-00060407-10400

Activation Key

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For Support Visit <http://store.bamboosolutions.com>

6. If you choose to activate by email, click the support@bamboosolutions.com email address and send the License Key and Machine Key to Bamboo Support. Our Support Team will reply with an activation key that you will then type into the boxes provided. Then click **Activate**.
7. Your product has now been activated and is ready for use.



8. **Optional Step:** Click the **Choose License Server(s)** link. This page allows you to select all the web front end servers you may want to install Bamboo products on. However, this is optional. Please read the license servers page to determine your selections. Click **OK**, after you have made your selections.

