

1. Import data

For the best experience, we recommend Excel/CSV documents are created and uploaded with a row for column headers.

Go to the Dynamic Data section of your embed signage CMS.

The first page you see is your “Sources” page, this is where you can upload Excel/CSV documents or add FTP details to fetch Excel/CSV documents from an FTP location.

Click the add new source button on the top right of the page to add a new source.

Enter configuration details for your source.

Name - For your reference

Type - Type of source (Excel)

Depending on which source type you have chosen, you will see more options for that source type. Ensure all required fields are filled in.

Auto publish - Do you want to publish channels that include this source when the data is updated?

Click the add source button, the page will then show a screen with your data and a few more configuration settings, explanations below.

Use as header row - Set this option to the row containing your column headers. In the example.xlsx, this option would be set to the first row, but if, for example, you had the document title in the first row and the second row contains your column headers, you could set this option to row two.

Use as item title - This is used in some configuration settings and is to help you identify a row.

Use as item ID - If you are using device specific items or adding custom columns it is essential that you have this option checked. This uses the chosen column to match the row of data with the existing row and its device, or custom columns.

Each sheet has the above options. Remember to configure any other sheets too by clicking on the sheet name at the top left of the window.

When you are ready, click add source again. The page should reload and your new source will be in the list.

You can update source config, data and add custom columns (media or a webpage) in the source edit page. Click the source name, or eye icon to view the source edit page.

2. Adding Dynamic Data to a layout

Once you've added your data source, navigate your way to the layouts section and create a new layout and go to the layout builder.

Select or create a zone and click the "Edit Zone Playlist button on the right hand side of the screen.

Insert a Dynamic Data plugin by selecting the "Plugin" option in the Add new toolbar then click on the Dynamic Data item in the plugins panel on the right.

Configure the Dynamic Data playlist item by clicking on the Excel icon in the preview of the new playlist item or by clicking the pencil icon on the right of the playlist item.

3. Configuring the dynamic data playlist item

By default, the list rows option and the first source you added will be selected.

Dynamic data types

List Rows

Lists all rows from the Excel or CSV sheet selected in the "Sheet" option. With the "Queries" option to narrow down the search to specific items within the selected sheet.

Show device item information

Shows the column of data selected in the "Column" option, of the row that a device has been configured to show from the sheet selected in the "Sheet" option.

If a device is configured to play multiple items, it will periodically change between intervals defined in the customise area.

Visit the device edit page to configure a device to show specific items.

Show touched item information - Touch layouts

Show the column of data, selected in the "Column" option, of a Dynamic data item that was touched.

To link touch with Dynamic Data, create a touch event on the zone or playlist item containing Dynamic Data with a list of rows.

When configuring the touch event, set it to show a zone or page containing a Dynamic Data item with the “Show touched item information” option configured.

Queries

Queries are a way to only show specific rows from a Excel/CSV sheet, they can also be used to show information related to a touched item as explained in the “Show touched item information” explanation.

Connector - 1st input option

And - Items have to match this query as well as the previous query.

Or - Items have to match this query or the previous query

Column - 2nd input option

The column in the list of rows that you want to search.

Search types - 3rd input option

Equals - Search sheet for rows where the “column” option equals the value specified in the next input box

Does not equal - Search sheet for rows where the “column” option does not equal the value specified in the next input box

Contains - Search sheet for rows where the “column” option contains the value specified in the next input box

Does not contain - Search sheet for rows where the “column” option does not contain the value specified in the next input box

Less than - Search sheet for rows where the “column” option is less than the value specified in the next input box

More than - Search sheet for rows where the “column” option is more than the value specified in the next input box

Less than device specific column - Search sheet for rows where the “column” option is less than the device item column selected in the next option. A “device item” is explained above in Show device item information explanation.

More than device specific column - Search sheet for rows where the “column” option is more than the device item column selected in the next option. A “device item” is explained above in Show device item information explanation.

Equals the device specific column - Search sheet for rows where the “column” option equals the device item column selected in the next option. A “device item” is explained above in Show device item information explanation.

Does not equal the device specific column - Search sheet for rows where the “column” option does not equal the device item column selected in the next option. A “device item” is explained above in Show device item information explanation.

Contains the device specific column - Search sheet for rows where the “column” option contains the device item column selected in the next option. A “device item” is explained above in [Show device item information](#) explanation.

Does not contain the device specific column - Search sheet for rows where the “column” option does not contain the device item column selected in the next option. A “device item” is explained above in [Show device item information](#) explanation.

Less than touched item column - Search sheet for rows where the “column” option is less than the touched item column selected in the next option. A “touched item” is explained above in [Show touched item information](#) explanation.

More than touched item column - Search sheet for rows where the “column” option is more than the touched item column selected in the next option. A “touched item” is explained above in [Show touched item information](#) explanation.

Equals the touched item column - Search sheet for rows where the “column” option equals the touched item column selected in the next option. A “touched item” is explained above in [Show touched item information](#) explanation.

Does not equal the touched item column - Search sheet for rows where the “column” option does not equal the touched item column selected in the next option. A “touched item” is explained above in [Show touched item information](#) explanation.

Contains the touched item column - Search sheet for rows where the “column” option contains the touched item column selected in the next option. A “touched item” is explained above in [Show touched item information](#) explanation.

Does not contain the touched item column - Search sheet for rows where the “column” option does not contain the touched item column selected in the next option. A “touched item” is explained above in [Show touched item information](#) explanation.

Search Value - 4th input option

The value or column to search for.

Customisation

The customise area has different options available to format the view of the data.

Order rows based on column values, display rows as columns or as a slideshow.

Adjust row heights, alignment and manage background colours for rows and columns/fields within.

Select, position and layer columns/fields within the WYSIWYG editor.

Format column/field values and add text formatting.