

# List Manager Quick Guide v1.2.0



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**NOTE**: This guide explains ListManager v1.2.0 functions, so it's for joomla 1.6,1.7,2.5 & 3 users. If you use joomla1.5 please refer to LM v0.0.3 guide <a href="here">here</a>.

List Manager is an extension that allows dynamic creation of different data lists and shows a frontend interface to provide users the function of insert, update, and query data from them. Also includes back-end utilities to manage the lists, and load data into them.

Users can search records, filter, and order them and export the list to pdf and excel formats.

Front-end presentation can be shown using different layouts and configuring access control rights. Records can be assigned to one joomla user and configure the list to show/edit only owned data for each user.

Each field can be configured to be editable/read-only through an ACL option enabling access rights to joomla groups. Different views of the same list can be configured changing rights or filtered data.

### First steps:

### 0. Installation

First of all you must install package. It will install component, modules and plugin.

### **Troubleshooting:**

### Failed to load this file in server

This new version of the extension contains a heavy library, regarding pdf creation. Because of it's size, some servers reach the file size limit to upload the zip file, first step of installation. If this is your case, you can try an alternate installation method:

Unzip the package to extract the different installers. You will be able to install separately these parts, except the com\_listmanager component. In order to manually install the component, unzip it again and upload its contents to a temp folder on your server (by default joomla/tmp). Select 'Install from Directory' option from Extension Manager and select the folder where you previously uploaded the files.

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### 1. List Manager Menu

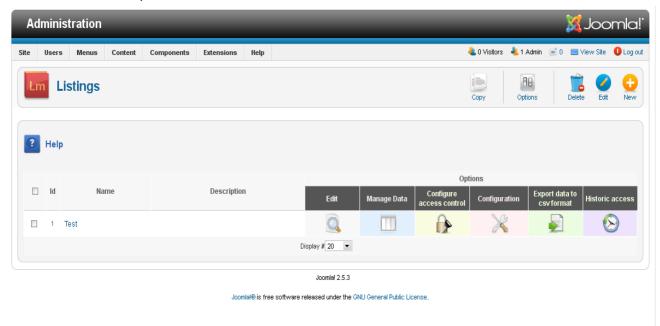
List Manager adds to your administration one menu link:



Click in menu link and 'Go to Defined Lists' at presentation page.

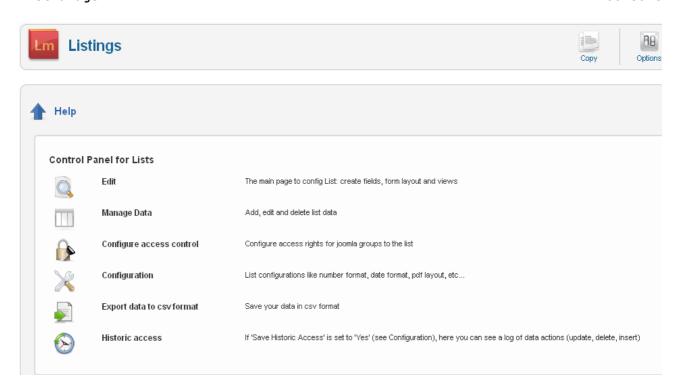
## 2. Listings – Back-end Administration

Through this page you can manage all lists available for your site. You can create an ilimitated number of different sets of data. Each listing contains different number and type of fields (the 'columns' of the table).



At backend you wil find help icons on the top left side of the screen, that will display some information about the options available.

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Click 'Help' again to hide/show the information.

To create a new list we select 'New' from the toolbar, and on the next screen we define the following data for our list:

Name: Short name of the list.

**Description**: Long description. It will be shown on the page we are going to manage the data at our site.

### **Adding Fields**

The next section refers to the fields we want to define for our list. Click 'Add Field' for each of the columns you need to add to your list. For each column, you can configure:

- Name: Will become the column title for the field.
- ◆ Internal Name: Alias used to place the field at input or detail forms. Please note you should only use A-Z a-z 0-9 characters here.
- ◆ **Required**: Check for required fields at the input form. They would be validated before form submission.
- ◆ **Type**: You can choose among these options (attached the corresponding front-end input form view):
  - ◆ Number

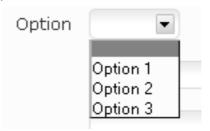


◆ <u>Date</u> (calendar)

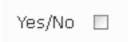
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- ◆ <u>Date (today)</u>: Date field set to the today date by default.
- Radio Button: List of options for single selection using radio button.
- ◆ Option List (combobox)



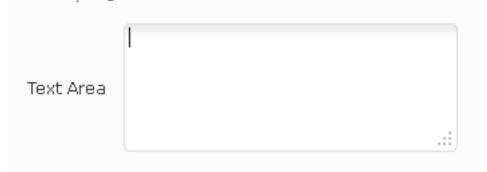
♦ Yes/No (Check)



◆ <u>Text</u>: Default text input.



◆ <u>Text Area</u>: Big section of text, used to ask for non-formatted, multiline text.



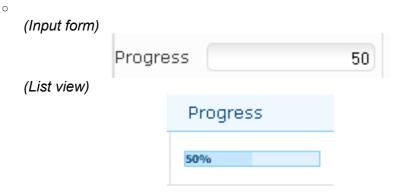
Set its default width using the 'size' parameter at field administration.

- User: If you add a user column to your table, each record will be assigned to the user that inserted the row. You can show the name of the user at your view or not, but the record will belong to that joomla user. Field user will not be requested when filled data, and if shown (marked as visible), will display the name of the joomla user who inserted the record. This assignment is used to filter records for each user, configurable at parameters section for the component or module.
- ◆ <u>Progress</u> (progress bar). It shows a progress bar according to percentage calculated with value and range configured through down/up limits. For ex:
- With a configured range of 0-200, a value of 100 will show a progress bar filled at 50%.

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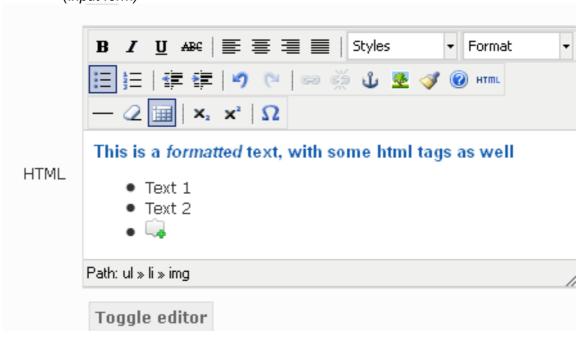
 With a configured range of 0-100, a value of 25 will show a progress bar filled at 25%

 Don't forget to configure up and down limits in order to get the progress bar working properly

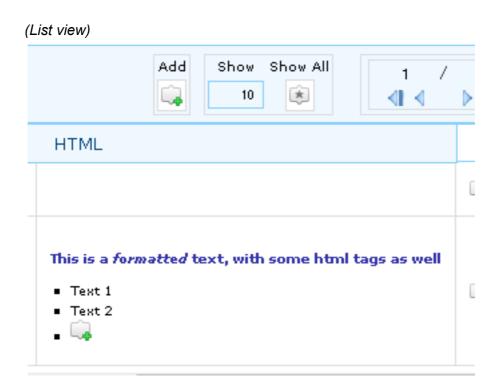


◆ <u>HTML Editor</u>: Shows your configured joomla editor as a helper to introduce html code that will be shown at your list.

(Input form)



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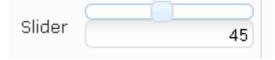
• Multiple option (check): A list of several options to select using checkboxes.



◆ Multiple option (list): A list of several options to select using a multiple combo box.



• <u>Slider</u>: Graphical input of a numeric value dragging the slider within the limits.



◆ Rating: Ask your users to vote from 1-5 stars.

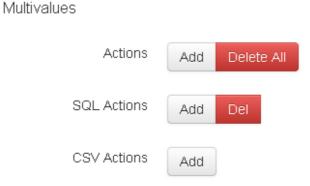
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Note: This field type is intended to be used inside the table data, not to be edited at the input form, if you place it there, user will be able to see the results but not to change the value.



- ◆ <u>Buy now paypal button</u>: It will display a buy now button that will redirect to the paypal payment process attached to your custom button. When filling the value for this field you should enter the paypal button ID and it will create the required form to redirect to paypal page. You should select **layout='SHOP'** for a list containing this field, and check it as **Visible='NO'**, in order to display the default buy now button at the bottom of the product sheet.
- ◆ <u>Link to another list</u>: You can configure this field attached to some other field of a different listmanager list. Following the link user will be redirected to the other list filtered by the field you attached the value to. You can choose if you want the link to use current tab/window, a new one, or if you want to view the linked list inside a popup, which size is also configurable. You must fill the url where you have published the second list, and the list/field to apply the filter.
- ◆ Loading values: For option list, multiple options... Values to be shown for selection can be filled manually, through a sql query, in case you want to recover values from some existing table at your database, or introducing data using csv format.

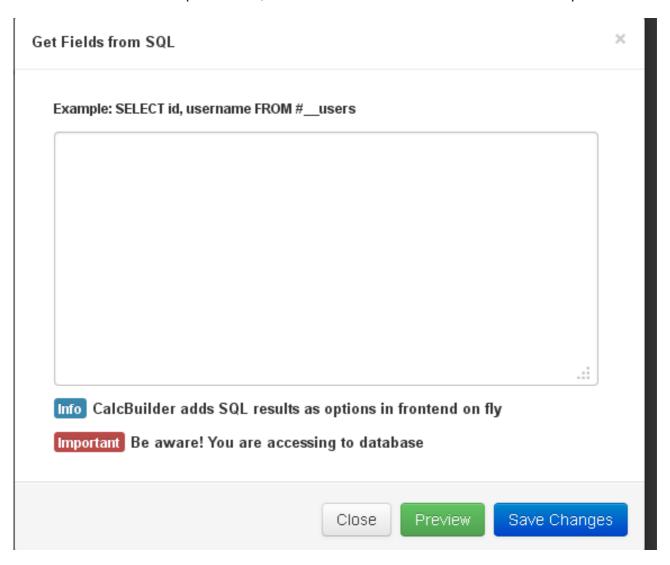


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**ADD**: 'Name' of the option is the value shown inside the combo box to be selected, 'value' is the 'alias' created for that value to be shown at the list.

Actions	Add	Delete All	Name	Option 1	Value	01	
QL Actions	Add	Del	Name	Option 2	Value	O2	

**SQL** query: Press SQL icon to add a new query to recover values dynamically when showing the form. You can enter any valid query to access your joomla database to recover at least two values per records, that will be used as 'value' and 'name' for the option list.



This example would recover users id as values and usernames as names for the list. Still another example:

SELECT alias,title FROM #\_\_\_menu

would recover all your menu entries, using alias for the values, and title for the names of the options. You can preview data that will be recovered using the preview button.

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**CSV.** A textarea will be shown for you to enter your data set.

# × Get Fields from CSV Paste your CSV content (Example: NAME, VALUE)

Paste your csv content (one option per line, comma separated), in order to create your multivalues options.

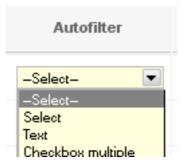
- ◆ **Default**: Enter here if you need a default value for the field to be present at the input form.
- ◆ **Visible**: Column that will be shown at front end table. Uncheck this option if you need to 'hide' some columns and handle them only through back-end.

Save Changes

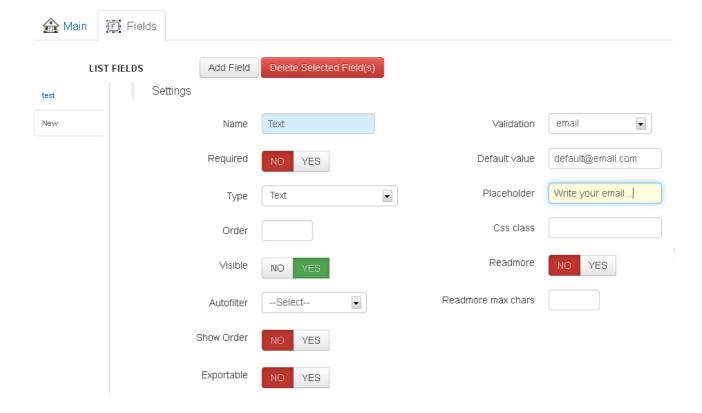
Close

- CSS Class: Apply a custom style class to this input field.
- ◆ Autofilter: Select if you want to place an autofilter header for this column. You can select among

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- Select: It will place a combobox at the header to select one value of the column.
- Text: Free text filter at this column.
- Checkbox: It will show all distinct values of the column to allow selection of multiple values.
- Show order: enables/disables order links at the column header.
- Order: Order of the column.
- Exportable: Marks this column as exportable for pdf/excel/email.
- Validation: When using text type, you can add automatic validation for letters/letters&numbers/email/url.
- Default value: Shows this default value at the input form.
- ◆ Placeholder: Default instructions text
- Readmore/readmore chars: For text types, introduces a [...] text after the number of chars configured, linked to a view of the whole text.



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You can specify different options according to type selected; number of decimals for type 'number', up/down limits, size of the fields...all these options are also turned into form validations when users are adding data to the list.

Save configuration and you're done with this section. Now we are going to configure the form layout form for front-end input:

### Layout

When your fields list is ready, you can define the layout for the form that will be used for user input. Select

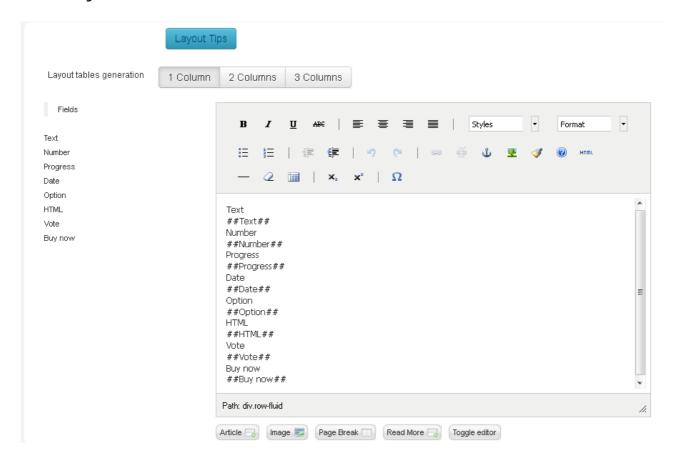
Form Layout

option from the list menu and build the form. You can freely use the html editor, and place ##xxx## at the point you want the input field named 'xxx' to appear (internal name). At the editor side all fields names are shown to help you with form construction.

You can also generate an standard form layout using the buttons at the top.

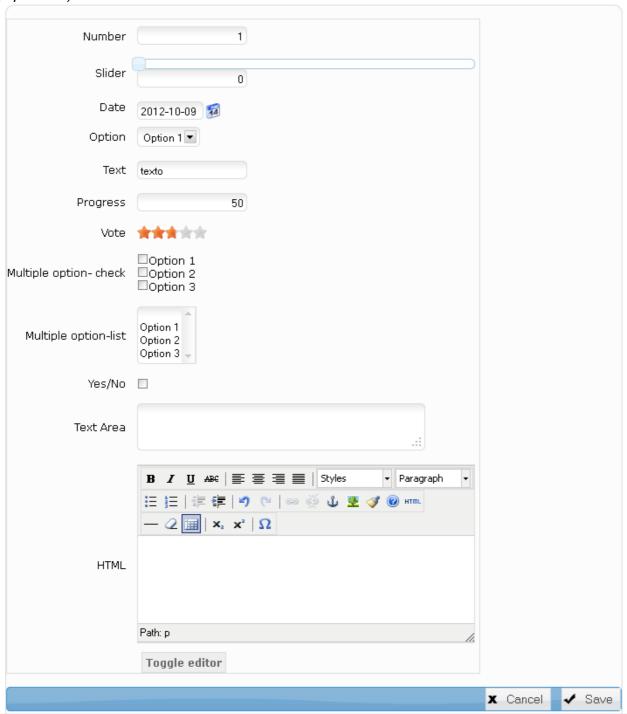
They will place your fields in order arranged in the columns specified.

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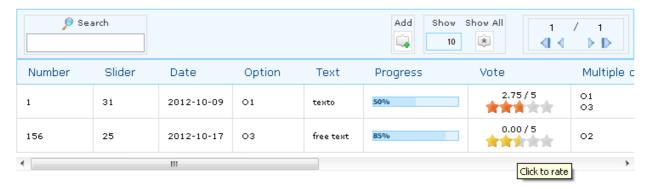
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Front end view will be shown as follows: (Input form)



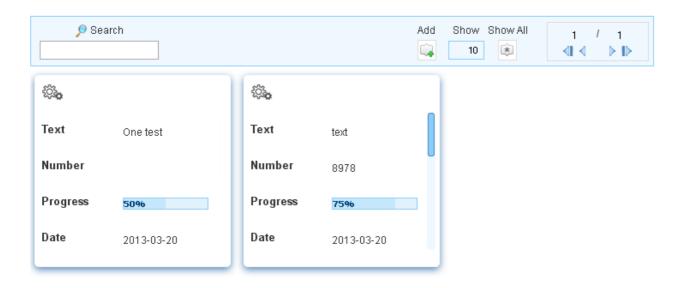
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### (List view)



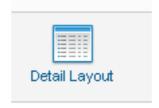
### (Tab view)

### test



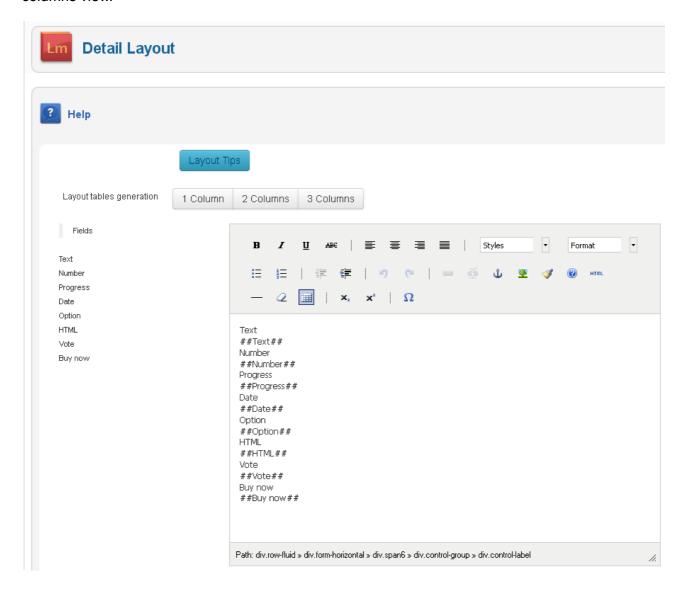
### **Detail View**

If you want to include a detailed view of the records (a non-editable view of one record data, including some/all columns defined), you must configure the detail layout as well.



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You will enter a similar configuration page than the one used to define the form layout. You can use the html editor to manually place the fields you want to show, or use the helpers to create a 1/2/3 columns view.

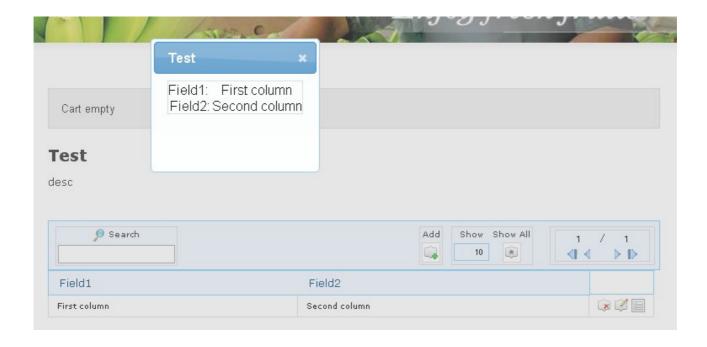


If access to detail is enabled for users, a new icon will show at front-end list:



which displays a section with the layout configured.

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### **Managing lists-copy**

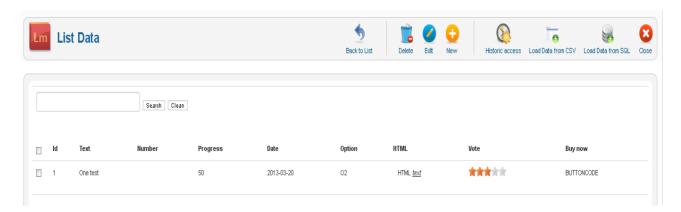
You can create a copy of the structure of your list selecting it at listings page and clicking 'Copy' at bar menu. This action will add a new list to your set, same fields that original list, and adding (\*) to its name to locate it easily as a copy. You can change its name afterwards.

### **Managing lists- Data**



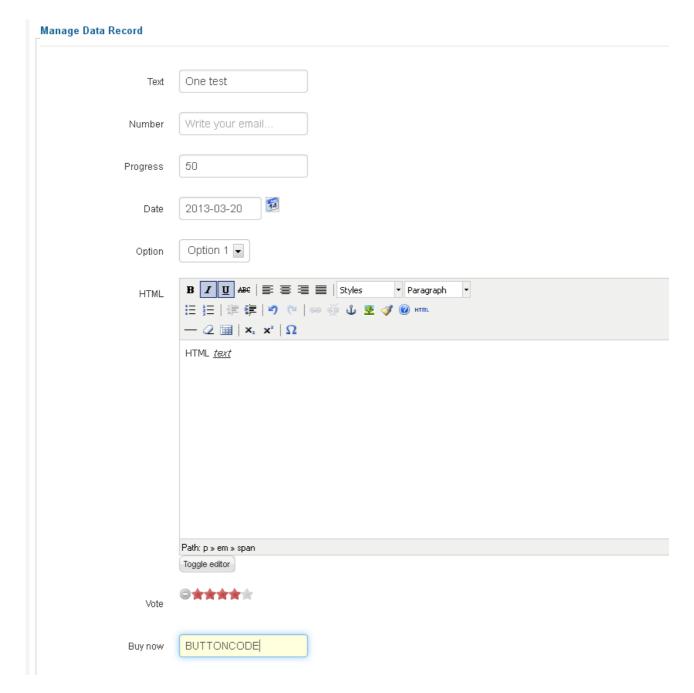
This icon leads to the page where administrator can view and manage the data inserted at the list.

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Administrator can insert delete/edit and create new records. The page will show all defined fields (with actual values if editing) ready to be changed.

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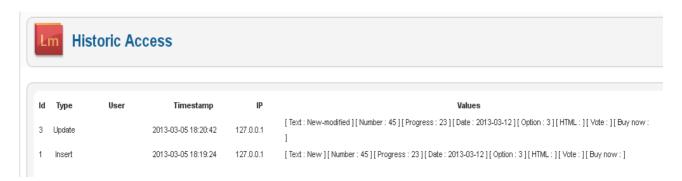


Administrator can use the option



to select one record and check the history of the record (if enabled at configuration parameters)

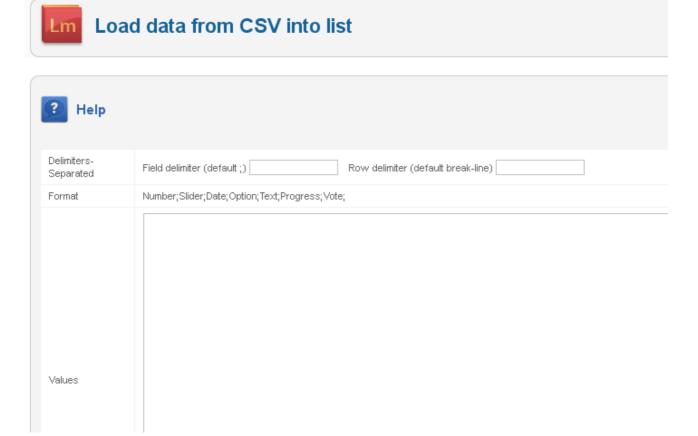
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To insert massive data to the list you can use the options to Load data



Load data from CSV will display a text area where you can copy data to be inserted with lines of plain text (csv). The page indicates which should be format and order of the fields to load. You can choose your preferred character limiter for fields/rows.



All records will be inserted to the list, one for each row included.

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### Note:

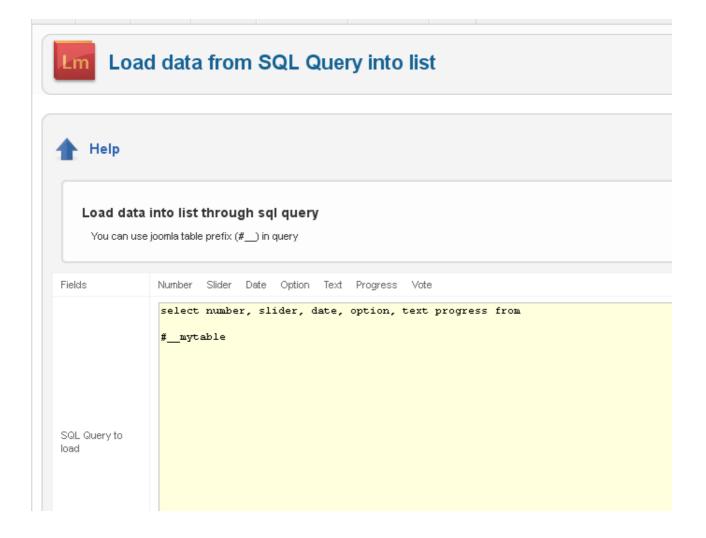
For fields typed 'option list', you should include the value to be inserted, not the name of the option.

For filelds typed 'user', you should fill joomla ID of the user.

For multivalued fields, separate values with a # character, this way: val1#val2#val3

Whe could add several records to our example product list this way:

New product; Comments 1, O1
And yet another one; <b>html section! </b>, O1



When using SQL option, you must fill in the query to be executed. The results recovered will be inserted as new records of your list. You can use any sql valid and the preffix #\_\_ to refer your database preffix.

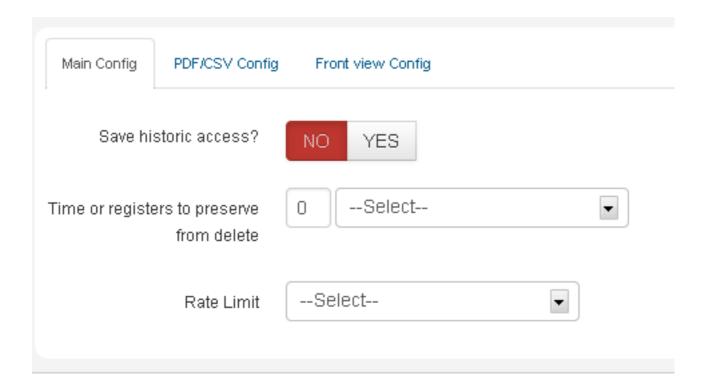
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### **Managing lists- Configuration**

This option



will lead you to the preferences page to configure general parameters for your list:

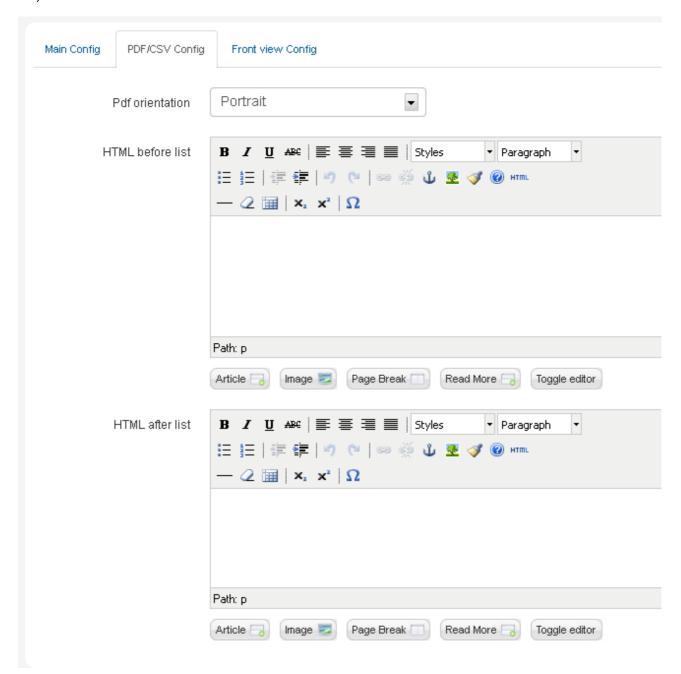


**Save historic access**: Select if you want to track the actions your users made to your list (insert/edit/delete).

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**Time/registers to preserve:** Amount of time/actions you want to save at historic access log.

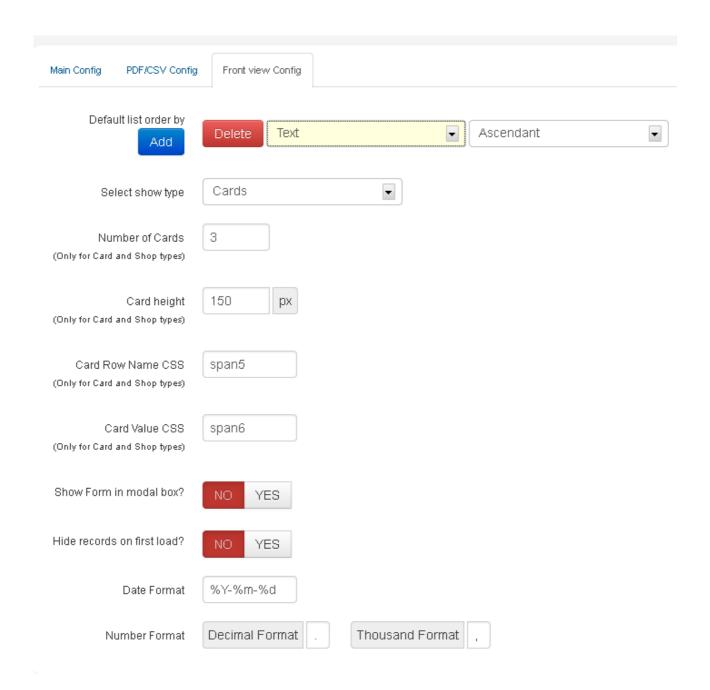
Rate limit: Limit your users vote several times (using their IP or their user name to reject duplicate votes)



**Pdf Orientation**: To select between portrait/landscape output.

**HTML Header/Footer:** These sections allow you to configure html sections to add before/after your list data when exporting to pdf.

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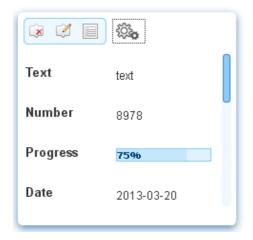


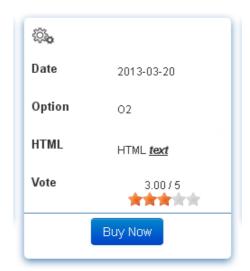
**Default list order by:** Select one or more columns and their orders to show your list ordered by default at the front-end.

**Select show type**: List/Cards/Shop. Choose your preferred layout for the records:

Text	Number	Progress	Date	Option	HTML	Vote
One test		50%	2013-03-20	02	HTML <u>text</u>	3.00 / 5
text	8978	75%	2013-03-20	01	yet <u>another html</u> text	0.00 / 5

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For cards/shop you have also available some fields to arrange and configure the cards layout (number of cards per row, width, css).

**Show Form in modal box:** check this option if you want your input form to show inside a pop-up dialog.

Hide records on first load?: It will hide your list until one of the filters/search options is used.

**Date format:** Choose the calendar date format to show/order your dates according to your local preferences.

Number format: Choose characters used to format number according to your local preferences.

### **Managing lists- Export**

This icon



allows to download a csv export of your data.

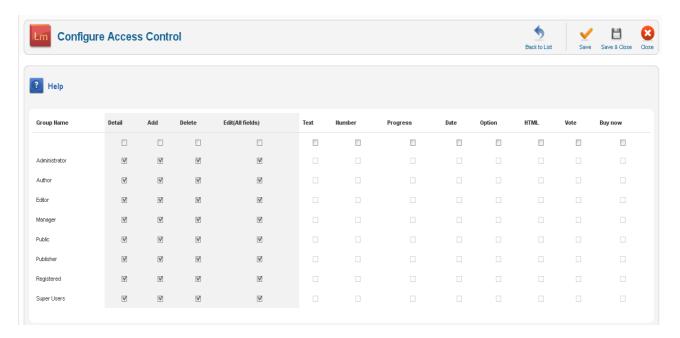
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### **Managing lists-ACL**

This icon



displays the screen to configure access rights for joomla groups to the list.



You can check if the different groups will have access to add new records to the list, delete them, and which columns will they be able to add/edit (they can be selected through 'all fields' option or filter which of them will be opened at the form. Be sure you save at least once this parameters before publishing your list for front-end management, and if you allow 'add' permission for one group, you should select at least one of the columns to allow for edition, in order to add records with some column filled.

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### **Managing lists- Historic Access**



With this option you can check the log of actions made by your users at front-end. You can filter the information by action, user, or free text.



Selecting one of the actions and pressing



option you can access a detailed view of the record values and information about the action executed:

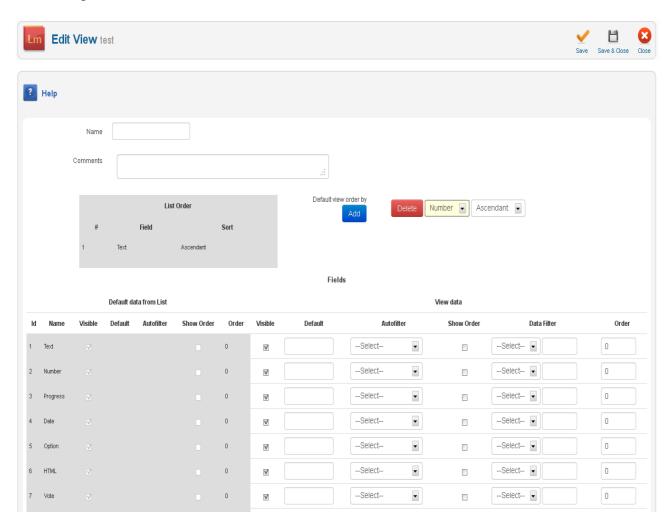
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		Historic Access	5
ld	1		
Туре	Update		
User			
Timestamp	2012-10-11 09:31:18		
IP	127.0.0.1		
	Field		Valu
	Number	1	
	Slider	31	
	Date	2012-10-09	
	Option	01	
	Text	texto	
Values	Progress	50	
	Vote	2.750000	
	Multiple option- check	01#03	
	Multiple option-list	02	
	Yes/No	Yes	
	Text Area	text area text	
	HTML		

### **VIEWS**

In addition to the default configuration of your list, you can also create views from it. A view is based on the same list, but with some changes from the default configuration. This allows you to create several pages with different options for your users although they will share the same records. To create a view, select the option 'View' from list configuration, you will be directed to a configuration page, where you can name your view, and add some comments for you to make annotations (they are only for administrator use, they will not be shown elsewhere).

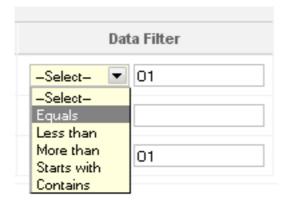
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At the left side (with grey background), the default configuration of the list is shown. At the right side you can change parameters that will apply only to this view. You can configure your view with these options:

- Hide/Show columns changing the 'visible' check
- · Define default values
- Create autofilters for column headers
- Show/Hide order option for each column
- Create the view with filtered data.

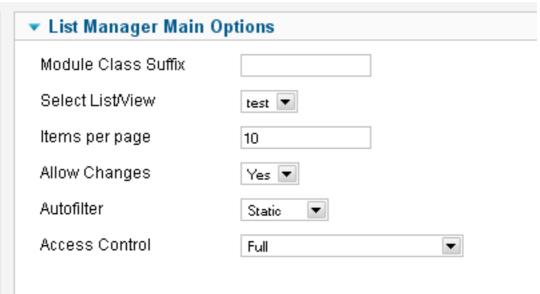
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When configuring this filter, the view will apply all filters before showing records, so you can create sub-sets of your records to be shown on different sections of your site.

### 3. Publishing module/menu component

Next step is to create a list manager module or a menu component that will work as frontend management. Go to Module Manager and create a new Module of type 'List Manager'. If you want to add a new component menu go to Menu an add a new one typed 'List Manager'. In addition to standard parameters (Title, position, access level...), you can set the following parameters:



- **Module Class Suffix**: if you create a custom css to style your listing, you can fill the sufix here to apply css to the view.
- Select list/view: Choose among your listings defined, or any of your views created for your lists.

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- Items per page: Default value for pagination.
- Allow Changes: Selecting 'YES' will show at the page a full-functioning administration, with permissions to add, edit, and delete records of the list. 'No' will show the list of data without edition rights, where users can only search, order and export data. Configuring access level and user access control in combination with this parameter allows to define different pages accessing the same list but with different profiles (for ex. one administrator with full access introducing data and users consulting the table).
- **Autofilter**: (static/dynamic). If you set the filters dynamic, they will rebuild themselves each time the filter is applied, showing only the remaining options available (emuling excel autofilter function)
- Access control: 'Full' indicates that every record is available for all users. 'Only user records' displays to each user only their own records. 'See all/edit only user records' shows every record, but it allows editing only owned records of the actual user. For these last two options to apply, the list must include a column of type 'user' to store the records associated to joomla users.

▼ List Manager View Op	tions
Show Animation	No 🔻
Show totals	No 🔻
Export all columns	No 🔻
Excel export	No 🔻
Excel (Filtered) export	Yes 🔻
PDF export	Yes 🔻
PDF (Filtered) export	Yes 🔻
Show email field	Yes 🔻
Show email field (Filtered)	Yes 🔻

- **Show Animation:** Choose if you want to display your input form with a smooth effect. Disable this option if you face problems with html editor input field.
- **Show totals**: Adds a new line at the end of the list, which will contain the result of the values for each numeric column defined. Each column will excute the operation configured at fields configuration.
- Export all columns: With default value 'NO' export to pdf and excel will show only visible columns. If switched to 'YES', pdf and excel will include all defined columns for the table, visible or not.

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• **Excel export/PDF export:** Enable/Disable links to excel and/or pdf export. With these options always all records will be included at the output, regardeless of the filtered/serached data present at that moment at the front-end view.

- Excel export/PDF export:(Filtered) Enable/Disable links to excel and/or pdf export of actual data. Only records visible at front-end at the moment of export will be included at the output.
- **Show email field (filtered):** Displays an input field to enter an email to send the list contents to. (Filtered) will send only displayed records at the time the information is sent.

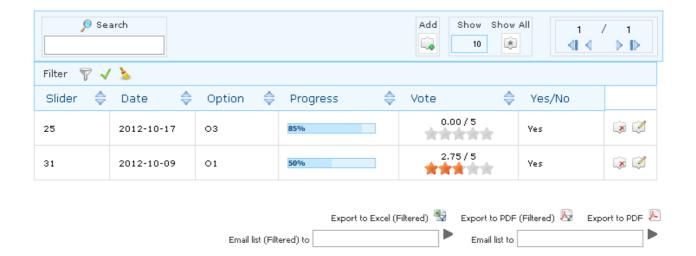


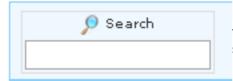
• **Searchable-Searchlink**:: Used with search plugin. If the list is marked 'searchable', the search plugin will search inside list manager table values to locate the list. Searchlink is the url you want to link to and show at the results if searching with joomla search module finds a value inside your list.

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### 4. Front-end Management

Once the module is published, we can access the site to work with data. One example with all options enabled would be shown as follows:



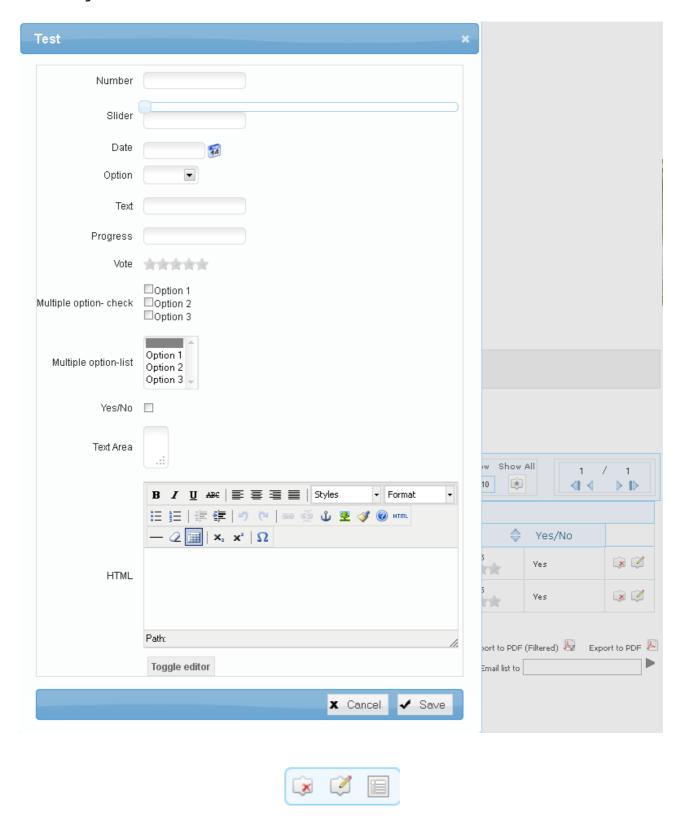


First search section allows to search data in every column of the table. It searches for rows containing the text written and shows only coincident data.



Button 'Add' displays the form to fill new data. The form will ask for all fields of the list, but only allowing the fields selected for the group actual user belongs to. In case you have selected to show the form on a modal dialog, it will be shown inside a pop-up window.

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Right icons for each row allow to edit, delete, or view the detail sheet of the record

When using cards or shopping layout, options are displayed using the icon at the top.

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Clicking column headers will sort data according to the column selected in ascending/descending order.



Pagination controls of the tool bar are used to show 'n' rows per page, showing all records in a single page, and controling pages first/back/next/end.



Filter toolbar shows options to display/apply and clean filters. Each column will display the filter type configured at field configuration.



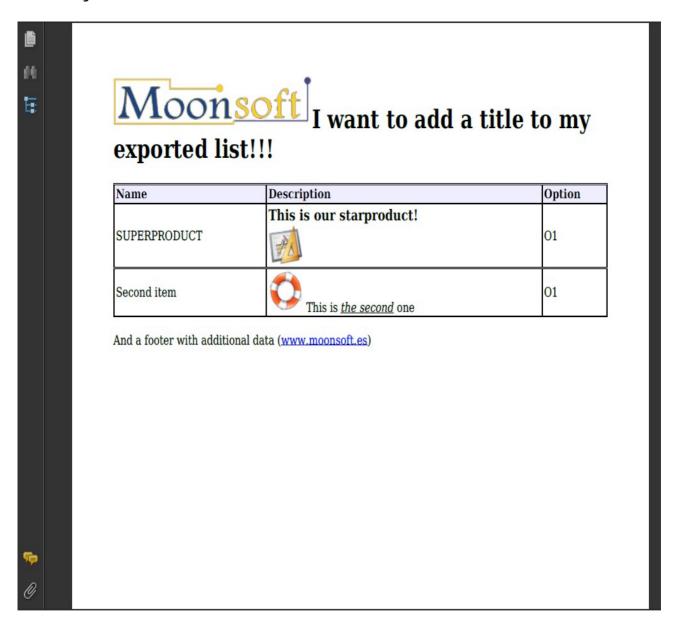
At the bottom of the table links 'export to' create a file to download with records from the list, in excel or pdf format.



Send 'email to' options allow to send contents to the address introduced.



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If the module is defined with parameter 'Allow changes' marked as 'No', the page will not show buttons to add/edit, or delete data to any group, in spite of having defined their acl with edition rights.

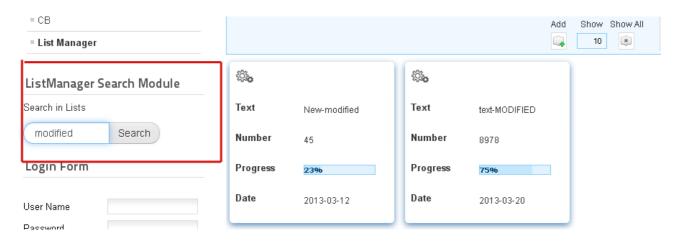
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### 5. MODULES: SEARCH, FILTER AND COMPARATOR

Now you have available several modules you can include anywhere on your site, separating the search, filters, and the comparator of records from the main view of the list.

When configuring your modules, you can select if they will hide the default search/filter options from the list header.

### **SEARCH** module

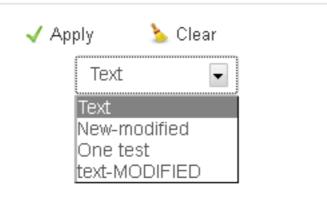


It will display a text search that will be applied to the lists published at the same page.

### **FILTER** module

The module filter will recover all filters created for your columns and create a module with filter functions:

# ListManager Filter Module

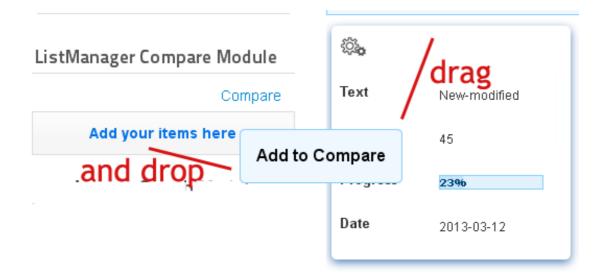


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### **COMPARATOR** module

Root Class		
fax number of items to co	mpare 5	
omparision table title	COMPARATO	DR <mark> </mark>
Set the header compare	Names	on the left O Names on top
See tool icons	O No	Yes
Gee tool texts	O No	Yes
See expand button	O No	Yes
Gee remove button	O No	Yes

You can configure the popup window which will be a helper to compare records from your list. The comparator module will only be active when the card/shop layout is selected. In order to add a record to the comparator, user must drag the records to the comparator area, and then press compare:



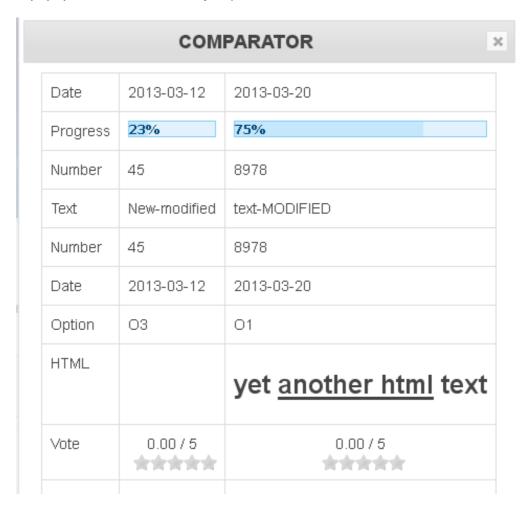
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(A couple of records added to compare module)

### ListManager Compare Module



(Comparator popup window - vertical layout)



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Date	Progress	Number	lext	Number	Date	Option	HIML	Vote	Buy nov
2013-03-20	50%		One test		2013-03-20	O2	HTML <u>text</u>	3.00 / 5	Buy Now
2013-03-20	75%	8978	text-MODIFIED	8978	2013-03-20	O1	yet <u>another html</u> text	0.00 / 5	

(Comparator popup window - horizontal layout)

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### Some useful examples. Step by step:

### Product List. Category view

We have a huge list of products, which we have classified adding a first colum 'category'. We want to add several options, one for each category, which should lead to a page with the list already filtered, showing only products linked to that category. We want to add values only from the backend.

### Method 1

- 1. Create your product list, adding one column 'Category'.
- 2. Publish the list on a standard content page (you don't need to add any menu), and keep the url to access the list. Parameter 'allow changes' should be set to 'NO'.
- 3. Create a second list of categories, with the field Category linked to the previous list using as destination field the Category of the products list. The url would be the one used to access the product list.
- 4. Publish your categories list and add it to your menu. It will display the category list, each one linking to the second product list already filtered.

### Method 2

- 1. Create List, adding a column 'category', typed as option list.
- 2. Fill records using 'Manage Data' options from back-end.
- 3. Create several views: One for each category. For these views, mark column Category as not visible. Define filter 'Equals to' for each category configuring it's value.
- 4. Create as many menu entries as categories available, selecting the required view for each one. Parameter 'allow changes' should be set to 'NO'.
- 5. Publish your menus.

### Adding some rights to administrator

Now, we want to be able to also add/edit records from the front-end, but only for site administrator, users won't have access to modify data. When entering each category, that value should be automatically assigned to the new record.

- 1. Create a form layout, with input fields, we will fill 'category' by default, so we could exclude it from the form layout.
- 2. Edit each view, and add a default value for category field with the right value.
- 3. Configure 'allow changes' parameter to 'YES'.
- 4. Access acl control list and disable all edit permissions for all groups except 'Administrator'

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### Workflow. Administrator must approve entries before publishing.

We want our users to be able to add records to the list, but they won't go live until administrator marks them as published through back-end. We don't want them to be able to modify records afterwards.

- 1. Add a new field to your list 'published', typed (yes/no), marked as not visible and with a default value of 'N'
- 2. Create your form layout for user input, not including 'published' field.
- 3. Create a view enabling "data filter" equals "Y" for column 'published'
- 4. Prevent users to change data inserted. Go to "Configure Access Control" and deselect delete and edit.
- 5. Publish view as component or module

Enjoy List Manager

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