

How do I use DDE (Dynamic Data) tables as a source?

1. Overview

DDE (Dynamic Data Engine) tables are data tables managed within the Converse platform. They are commonly used as master lists — store directories, product hierarchies, partner details, region mappings — and as the backend for form dropdowns. You can bring any DDE table into Vantage as a source, making its data available for dashboards, widgets, and AI queries alongside your other sources.

When you sync a DDE table, Vantage uses a truncate-and-reload approach: it drops the existing rows and reloads the full table from DDE, so the analytics data always matches the current state of the DDE table.

2. When to Use

- When you maintain reference or master data in DDE tables and want to use it for analytics.
- When you want to join a DDE lookup table (e.g., store master) with form submissions or uploaded files using relationships.
- When you have DDE tables powering form dropdowns and want the same data available in dashboards.

3. Concepts

- **DDE Table** – A dynamic data table managed within Converse. DDE tables can power live dropdowns in forms (including dependent and cascading dropdowns) and serve as operational reference data.
- **Truncate-and-Reload** – Each sync replaces the entire dataset in ClickHouse with the current contents of the DDE table. This ensures your analytics always reflect the latest master data.

4. Set Up Guide

Step 1: Open Sources

1. In Vantage, click **Sources** from the navigation.

2. Click **Add Source**.

Step 2: Select Connector Type

1. Select **Dynamic Data** as the connector type.

Step 3: Choose the DDE Table

1. You will see a list of DDE tables available in your organisation.
2. Select the table you want to bring into Vantage.

Step 4: Complete the Sync

1. Vantage reads the DDE table and loads it into ClickHouse.
2. The source appears in the Sources listing with a row count once complete.

Step 5: Use in Dashboards

1. The DDE source is now available for widgets, relationships, and AI queries like any other source.
2. To combine DDE data with form or Excel data, define a relationship between the two sources (covered in the Relationships book).

5. Best Practices

- Keep DDE table column names stable. Renaming or removing columns requires a resync and may break widgets that reference those columns.
- If the DDE table also feeds form dropdowns, keep the data clean and consistent — the same values will appear in both forms and analytics.
- After updating a DDE table, resync the source in Vantage so dashboards reflect the changes.

6. Related Links / FAQs

Does Vantage keep DDE data in sync automatically?

No. DDE source syncs are manual. Click Resync in the source settings whenever the DDE table has been updated.

Will resyncing a DDE source break my existing dashboards?

As long as column names haven't changed, widgets continue working after a resync. If columns were renamed or removed in the DDE table, affected widgets may need reconfiguration.

Can I use a DDE table as a lookup to enrich form data?

Yes. Add both the DDE table and the form as separate sources, then define a relationship between them using a shared key column (e.g., store ID). This is covered in the Relationships book.

7. Version Notes

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