

Using_data_tables_Content_v1

What are data tables?

Data tables are tools that allow people to store, retrieve and share information digitally. If you've used spreadsheets to manipulate data before, you'll find the data tables in your account familiar. If you're not familiar with spreadsheets, don't worry; we're here to help you.

Every data table in your account is structured to present the information for that section. See the section [About the data table icons](#) to understand more about the icons you see at the top of each data table.

Understanding the basic functions of a data table

In each data table of your account, all of the headings (except *All*) are clickable so that you can sort by that heading. See below. Each heading, Name, Status, Rescue ID, Species, Sex, Primary Breed, and Thumbnail, can be clicked to sort by the information in that column. Let's look at each heading in depth.

Current View: All		Total: 473			
Actions...	Views: All				
☐ All	<u>Name</u>	<u>Status</u>	<u>Rescue ID</u>	<u>Species</u>	<u>Sex</u>
			<u>Primary Breed</u>		<u>Thumbnail</u>

- Clicking the **Name** heading sorts the list of animals alphabetically either A to Z or Z to A.

<u>Name</u> ▲
<u>Aasha</u>
<u>Abbie Kei</u>
<u>Abby</u>
<u>Abhipsha</u>
<u>Abilene</u>

- Clicking the **Status** heading sorts the list by animal status. Learn more about animal statuses in the chapter [Managing animal status](#).

<u>Status</u> ▲
Adopted
Adopted
Adopted
Adopted

- The **Rescue ID** is a number automatically assigned to animals as they enter your system. You can sort by these ID numbers.
- Clicking the **Species** heading sorts the list alphabetically by species.

<u>Species</u> ▲
Bird
Cat

- Clicking the **Sex** heading sorts the animals by Male or Female.
- Clicking the **Primary Breed** sorts the list in order, either A - Z or Z - A (by clicking again) by primary breed. Not the arrow pointing upward to the right of the heading. Clicking the heading again resorts the list from Z to A.

<u>Primary Breed</u> ▲
Abyssinian
Abyssinian
American Shorthair

- Clicking the **Thumbnail** heading sorts the list of animals either by those who have no thumbnail picture or, by clicking the heading again, those who do.

Selecting multiple data records

You may want to take a bulk action for many rows of data (which we refer to as a record) in a particular data table. There are many reasons you may want to do this. For example, you may want to update a bunch of outdated submitted forms to the Cancelled status, or delete a group of animal records that were entered incorrectly.

For any data table, you can use the checkboxes on the far left column to select multiple records. Please note, you can select the ALL checkbox at the top of this column to select all currently visible records. (You may want to use the **Options** dropdown menu to select **Show Max** first, if you need to take action on lots of records at once.)

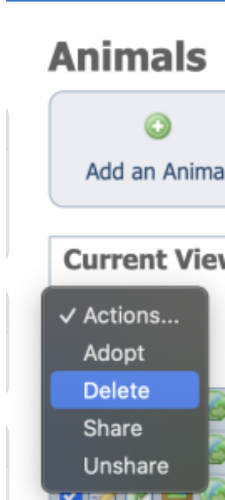
You can then use the **Actions** dropdown menu to complete an action for all the selected records. The **Actions** menu will contain actions specific to the data table you are viewing. There are a few examples below.

Bulk delete many animal records

If you want to delete all animal records listed on your data table at once, you could select the **All** checkbox.



Then you would use the Actions menu and select Delete.



Bulk remove specific subscriptions

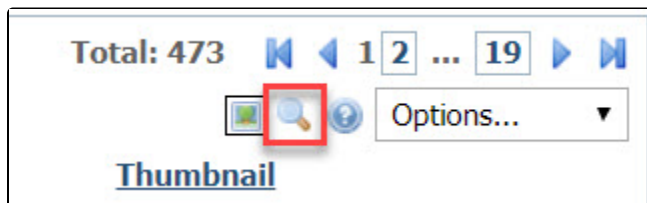
Use the checkbox to select the desired set of subscriptions. Then, use the **Actions** menu to **Remove** those subscriptions.



Searching specific fields in the data table view

You can search for specific data from the data table list by clicking the search icon on the right side of the data table. This will reveal text boxes below each column heading. You just type your search term in the box under the column you would like to search and press Enter. Depending on the data table view you have selected, you may have more fields to search. You can even enter search terms in multiple text boxes.

 This technique is best if you are looking for specific data one time. If you often need to look for a specific set of data (for example, senior huskies) then you may want to create a [Custom data table view](#).



Current View: All Total: 423

Actions... Views: All Options...

All	Name	Status	Rescue ID	Species	Sex	Primary Breed
Clear	Search					

There are a few differences you may notice using this search technique. Please review the examples below so that you understand what to expect.

Specific Field Search Example

In this example, you are only looking for animals that are named Chance and you only want records that are included in the custom data table view you have selected. You would click the Search icon and enter Chance under the Name column and press Enter. This would allow you to stay in your custom view and see only the animal records in this data table with the name of Chance.

Animals

Add an Animal
 Search Animals
 Settings

Current View: My Favorite View
 Total: 1

Actions... Views: My Favorite View

☐ All	Name	Status	Species	Sex	Color (General)	Breed	OK with Kids	OK with Dogs	OK with Cats
☐	Chance	Available	Dog	Male	Fawn	Boxer (short coat)	Yes	Yes	Yes

Multiple Specific Fields Search Example

Searching by specific fields is especially helpful if you have a few details to search by. Perhaps a potential adopter has asked if you have any available male Boxers that are a fawn color. As long as your selected view has those fields, you can enter multiple terms at the same time and then press Enter to narrow your list.

Animals

Add an Animal
 Search Animals
 Settings

Current View: My Favorite View
 Total: 2

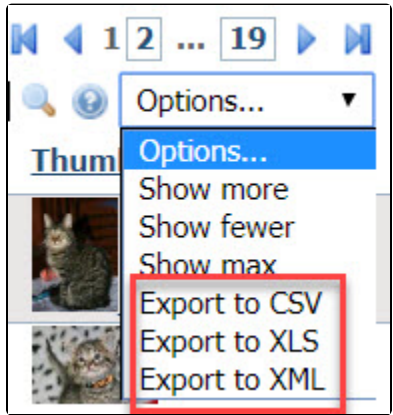
Actions... Views: My Favorite View

☐ All	Name	Status	Species	Sex	Color (General)	Breed	OK with Kids	OK with Dogs	OK with Cats
☐	Chance	Available	Dog	Male	Fawn	Boxer (short coat)	Yes	Yes	Yes
☐	Ely	Available	Dog	Male	Fawn	Boxer (short coat)	No		

Exporting the data to a spreadsheet program

You can send the information you see online to a spreadsheet program that helps you manipulate and use your data.

To export the data, use the **Options** drop-down menu to select the program of your choice.

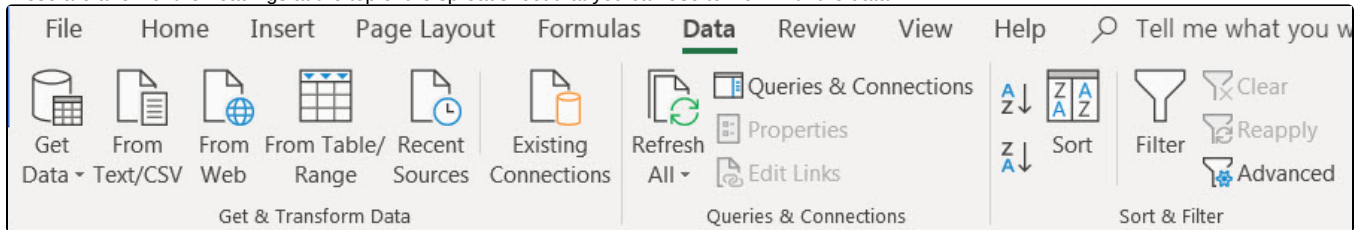


To export the data, click one of the choices:

A CSV, or comma-separated values, exports your data into a spreadsheet. This allows you to manipulate the data as you would in any other spreadsheet.

Name	Status	Rescue ID	Species	Sex	Primary Breed
Tiger	Adopted	C070059	Cat		Domestic Short Hair
Flossy	Adopted	C070060	Cat		Domestic Short Hair
Bon Bon	Adopted	C130007	Cat		Domestic Short Hair
Pooh Bear	Adopted	C070061	Cat		Domestic Short Hair
Marble	Adopted	C070062	Cat		Domestic Short Hair
Franny	Adopted	C070063	Cat		Domestic Short Hair
Kittylicious	Transferred	C130008	Cat		Domestic Short Hair

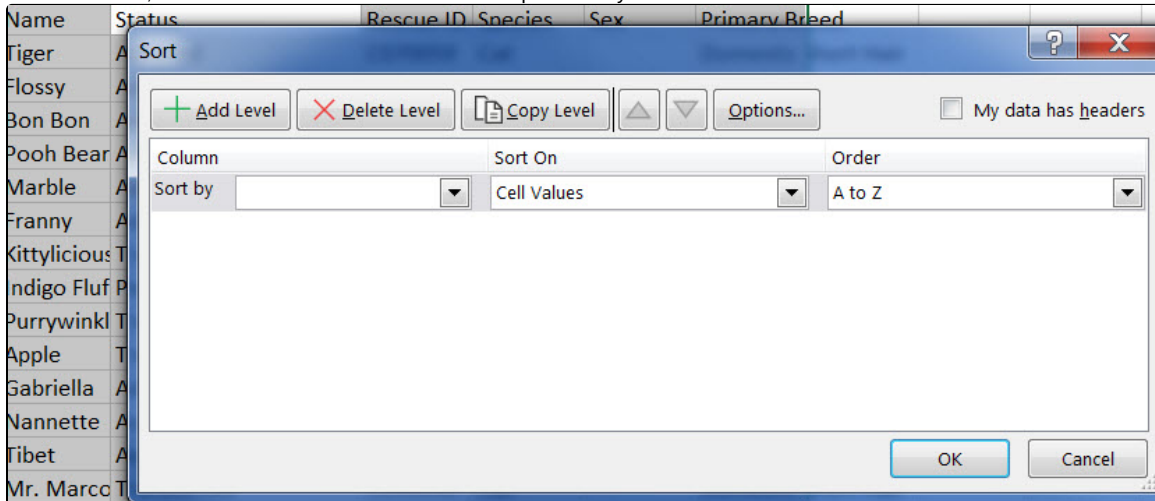
These are a few of the headings at the top of the spreadsheet that you can use to work with the data.



Simple sorting in Excel

Let's try a simple sort. Select the Status column and click Sort. Select to expand the selection. That means that not just the information in the column you've chosen will be reordered, but the other columns will come along as well, keeping your row intact.

The form below pops up. In the Sort by column, select column A, the animal's name. Leave the Sort On column at Cell Values (what is listed in the cell), and in the Order, select A to Z. You've sorted the names alphabetically.



Now, click the upper left corner of the spreadsheet. The spreadsheet should gray out. This selects the entire spreadsheet on which to perform the action you specify.

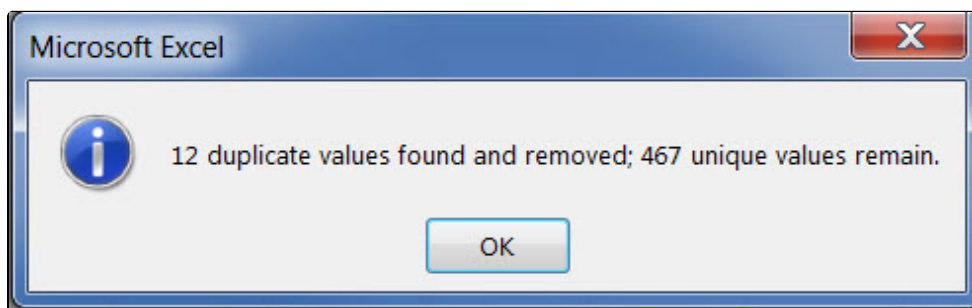
	A	B
1	Aasha	Transferred
2	Abbie Kei	Adopted
3	Abby	Hold

Sort again. This time sort by Column D, Species, then B, Status, then A, name. You now have an alphabetical list of animals, sorted by species (notice the bird is first), by status.

1	Spice	Hold	M100001	Bird		Conure		
2	Abbie Kei	Adopted	C060044	Cat	Female	Domestic Short Hair		
3	Abhipsha	Adopted	C150001	Cat	Female	Burmese		
4	Alexi	Adopted	C110003	Cat	Female	Calico		
5	Allegra	Adopted	C060007	Cat	Female	Maine Coon		
6	Allie	Adopted	C080058	Cat	Female	Siamese		
7	Alon	Adopted	C100015	Cat	Male	Russian Blue		
8	Alona	Adopted	C110007	Cat	Female	Calico		
9	Amber	Adopted	C070036	Cat	Female	Domestic Short Hair		
10	Angus	Adopted	C080043	Cat	Male	Bombay		
11	Anjo	Adopted	C120006	Cat	Female	Domestic Short Hair		
12	Ashton	Adopted	C080001	Cat	Male	Maine Coon		
13	Ashwin	Adopted	C150002	Cat	Male	Burmese		

Deleting duplicate animal listings in Excel

Notice that in the options for the Excel spreadsheet, you can remove duplicate entries. Remember, your organization may have more than one animal named Fluffy, so use this option with caution. However, you can always undo (by clicking the left arrow at the top) your choice, or you can download another spreadsheet. When you make changes on this spreadsheet, they do not affect your website.



Sorting with XML

You can choose to export your data in an XML format. Here is the same data exported to an XML format. Notice the arrows at the top of the columns. You can

1	id	Animal_Name	Animal_PrimaryBreed	Animal_RescueID	Animal_Sex	Animal_Species
2	198925	Toby	Domestic Short Hair	C070057		Cat
3	198950	Tiger	Domestic Short Hair	C070059		Cat
4	1448743	Rum Tum Tummy	Domestic Medium Hair	C090013		Cat
5	198953	Flossy	Domestic Short Hair	C070060		Cat
6	5649451	Bon Bon	Domestic Short Hair	C130007		Cat
7	1448748	Taco Taco Tommy	Domestic Medium Hair	C090016		Cat
8	198957	Pooh Bear	Domestic Short Hair	C070061		Cat
9	198966	Marble	Domestic Short Hair	C070062		Cat

Clicking the arrow for the column Animal Name sorts in alphabetical order.

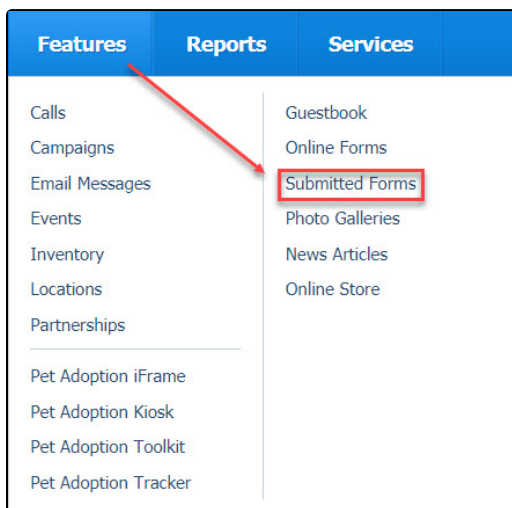
Animal_Name	Animal_PrimaryBreed
Aasha	Domestic Short Hair
Abbie Kei	Domestic Short Hair
Abby	Tortoiseshell
Abhipsha	Burmese
Abilene	Domestic Short Hair
Ace	Domestic Short Hair
Adonis	Bengal
Adriana	Maine Coon

Clicking the Animal Primary Breed arrow sorts by breed. Notice the two sorts were not accumulative, as they were when you used the sort function in Excel. In other words, you have one or the other sort.

B	C
Animal_Name	Animal_PrimaryBreed
Toby	Domestic Short Hair
Tiger	Domestic Short Hair
Rum Tum Tummy	Domestic Medium Hair
Flossy	Domestic Short Hair
Bon Bon	Domestic Short Hair
Taco Taco Tommy	Domestic Medium Hair
Pooh Bear	Domestic Short Hair
Marble	Domestic Short Hair

Working with Submitted Forms

Let's look at another data table, the Submitted Forms table. Click **Features > Submitted Forms**.



Notice that the data table for the forms people have submitted to your organization has very different headings than the list of your organization's animals. The data tables are constructed for each need. However, the same basic functions are the same. Clicking the headings sorts the information.

Current View: Active forms

Total: 2955

12...119

Actions... Views: Active forms

 Options...

☐ All

Form ID

Form

Contact

Status

Submitted

Open

Animal

Assigned To

Comments

Steps

Sort the forms by Status. If you sorted A - Z, you should see all of the forms with the status of Adopted first.

Status
Adopted
Adopted
Adopted
Adopted
Adopted
Adopted
Adopted

Sort by Submitted. You should see the forms in the date order in which they were submitted. This is very helpful for finding your most recent applications.

<u>Submitted</u> ▼
6/23/2018
4/8/2018
3/7/2018
1/12/2018
11/13/2017
9/9/2017
8/18/2017

Data tables can be very helpful once you understand the various ways in which you can manipulate the data in your account. This is a very brief overview, but it should get you started doing some basic spreadsheet tasks.