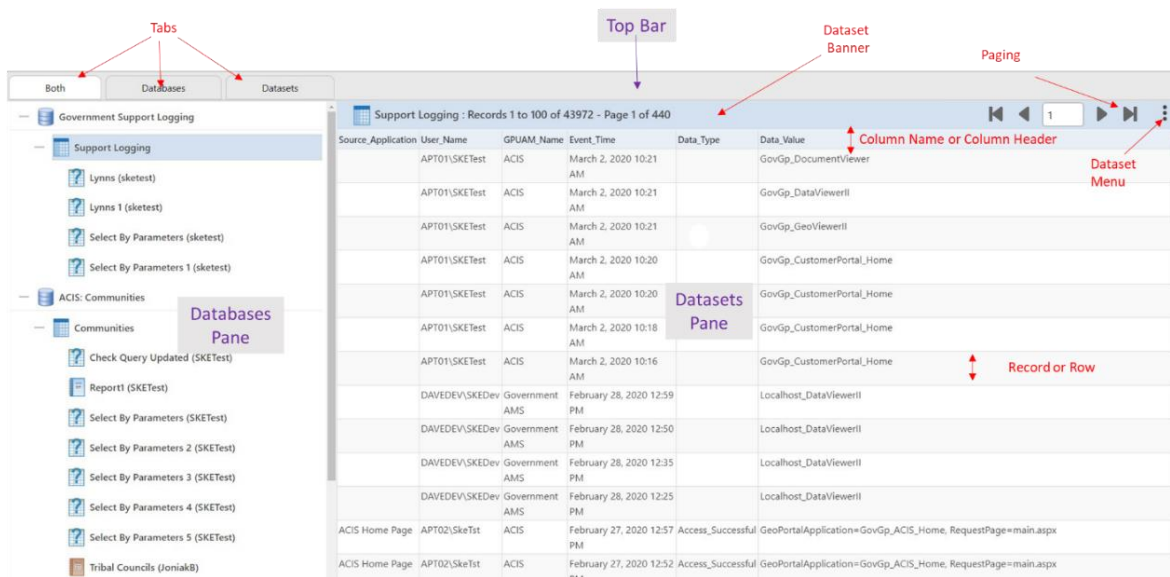







# DataViewer - Tools

## Quick Tips



## DataViewer Icons and their meanings


- I.  **Database Connections**
- II.  **Associated Datasets** from that Database Connection
- III.  **Associated Queries**
- IV.  **Associated Reports**
- V.  **Related Geoportal Links**

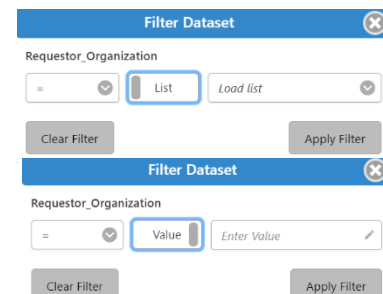
## Sort Data: How can I sort a dataset to display records in ascending or descending order based on a chosen field?

- 1) If using a mouse right click on the column name that you would like to sort.
- 2) A menu with column functions will appear. Choose between Sort in Ascending order or Descending order. The dataset will then update to show the data in that specified order.



## Filter Data: How can I filter a dataset to only display records with specified field values?

- 1) If using a mouse right click on the column name that you would like to apply a filter to.
- 2) A menu with column functions will appear. Select Filter  and a pop-up menu will appear.
- 3) Select an operator to define your filter from the drop-down menu. Then use the sliding bar to select how you would like to




# DataViewer - Tools


## Quick Tips




select a value; from a picklist or by entering a value. Once complete select “Apply Filter”. The dataset will then update to display records defined by the filter.

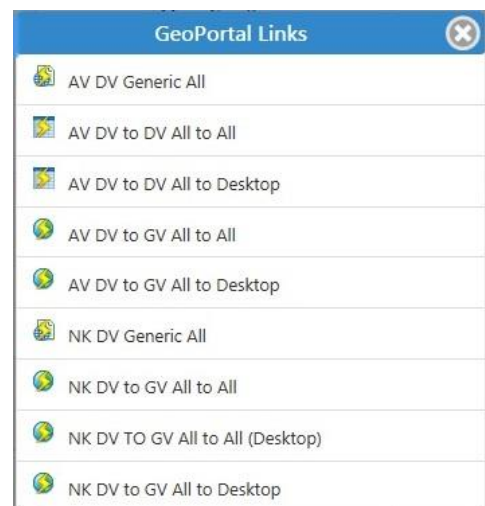
### Hide Data: How can I hide specific records?

- 1) If using a mouse right click on the column name that you would like to hide.
- 2) A menu with column functions will appear. Select Hide Column  and the chosen fields will be hidden from view.
- 3) Reload the page, or click out of the dataset and back in to unhide the column.

### Geoportal Links: How do I access a record’s associated maps, documents, web pages or reports from a connected business system or web service?

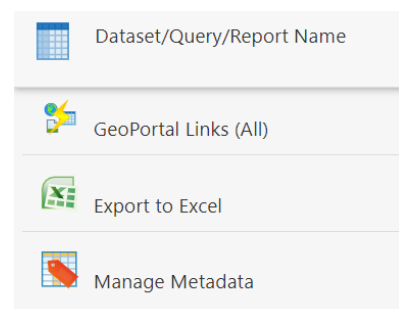
When a Dataset has related information (GeoPortal Links) then on the left side of the spreadsheet you will see icon  that enables access to all registered links. Clicking on the related information icon will display a list of related information link names in a new form.

1. **GeoViewer:** If you click the  icon then GeoViewer will be launched in a new window and zoom in on the map feature associated with the record. In other words, use this to map the record.
2. **DataViewer:** If you click the  icon then a new Dataviewer window will launch and display the associated record(s). This allows you to go from one Dataset to another and see the related details.
3. **Generic Links:** If you click the generic link icon  it will open a new window and display any related information (e.g. photos, reports) associated with the selected record.



### How to access links for ALL records within the current Dataset?

- 1) If using a mouse click on the ellipsis [⋮] to the far right of the blue Dataset Banner.
- 2) A slide up menu will appear at the bottom of your screen. Select *GeoPortal Links (All)* and the available links for ALL records in the current Dataset will be displayed in a form. Right clicking on the Dataset Banner will bring up a context menu with the same menu options.





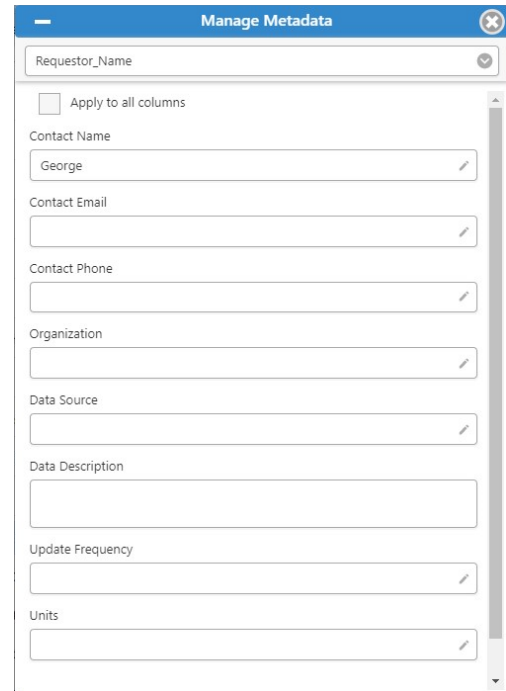
# DataViewer - Tools

## Quick Tips

### Manage Metadata: How can I add definitions and information about the columns/fields in my data set?

*Note:* This function is only available to Editors and Administrators


- 1) Right click on the Dataset Banner and select Manage Metadata from the context menu or click on the ellipsis on the far right of the Dataset Banner and select Manage Metadata. 
- 2) Select a column from the picklist at the top of the form.
- 3) Provide the column definitions as desired. If you would like to apply the definitions to all columns click "Apply to all Columns".
- 4) When you have completed inputting the information elements for a field, click Add.
- 5) **To VIEW the metadata definitions** for a Dataset, right click on the column name, select View Metadata  and a form will appear displaying the metadata for that column if it has been set.
- 6) To delete metadata definitions open Manage Metadata again and click the Delete button at the bottom of the form. The delete function is a global function and will delete all column definitions associated with the entire Dataset. The system will respond that the field definitions have been deleted.



The screenshot shows a web form titled "Manage Metadata". At the top, there is a dropdown menu with "Requestor\_Name" selected. Below this is a checkbox labeled "Apply to all columns". The form contains several input fields, each with a pencil icon for editing: "Contact Name" (containing "George"), "Contact Email", "Contact Phone", "Organization", "Data Source", "Data Description", "Update Frequency", and "Units".

### Excel: How can I export my dataset to excel?

*Note:* This function is only available to Editors and Administrators

- 1) Right click on the Dataset Banner and select Export to Excel from the context menu or click on the ellipsis on the far right of the Dataset Banner and select Export to Excel. 
- 2) Export Excel sends the spreadsheet to Excel. The header will include the name of the source dB connection and the name of the data set. It then prompts to open or download and save the file on your computer.