Using Data Viewer

Use the Data Viewer to create lists from data fields you select such as name, date of birth, classroom, etc. Then print the list or export it to a spreadsheet (or other format) to manipulate outside of Procare.

1. At the main Data Viewer screen several categories may be listed like Family Data, Family Accounting, etc. Click the plus sign (+) next to a category like *Family Data* to expand the list.

2. Within each category are items known as “Data Views”. A *Data View* is a collection of information organized in a certain way. For example the *Account Information* “view” (under Family Data) includes most fields associated with the people in each family. Several default views come with Procare. Any new data views you create will appear under the default view used to create them.
   a. To install a prebuilt view that you might not have, click the **Browse button** (lower left) for a list of additional views.
   b. To create a new view based on one of the defaults click once to select the Data View you wish to use as a starting point like *Account Information*.
   c. To work on a custom view you previously created, or to use it as a starting point for a new view click the plus sign (+) next to the default view it resides under such as *Account Information* to expand the list then click once on the name of the view like *My Custom View*.

3. Some views require you to choose an *As Of Date*, or *Start* and *End* dates (lower right side). When using the default *Account Information* view the “as of” date is used to include only families with children whose *Enrollment Status* is “enrolled” as of the specified date.

4. To generate a new custom view based on the one currently selected click the *Create* button (lower right), or to look at, or change a view you previously created click the *View* button.

5. At the Data Viewer screen:
   a. Enter a *Title* and *Description* (optional) if this is a new view.
   b. Select a *Layout* if this is a new view. “Standard” is the easiest layout in which to work since it looks similar to a spreadsheet.
The advanced views are not recommended for persons new to using the Data Viewer.

c. Select a Type of “Global” if this view should be available to all your Regions & Schools or “School” if it should be available only to the one location to which you are currently logged in.

d. Click the Choose Fields button (toward top center of screen) and select the Data Fields you wish to have included for example the Primary Classroom, Last Name, First Name, and Date of Birth. As you select each field it will displayed on the screen in the background.

   **Hint:** Click None to unselect all fields then pick the ones you wish to include.

e. Arrange the fields by dragging them on the screen in the background. For example you may wish to drag the “Primary Classroom” column to a different position.

f. Sort the fields by clicking the heading such as Last Name to sort alphabetically. To sort by more than one item click the first header by which you wish to sort (perhaps Primary Classroom) then hold the Shift Key (on your keyboard) and click a secondary sort (such as Last Name). See also: Dual Sorting

g. Filter the fields by clicking the tiny gray funnel icon in the upper right of the heading. For example you may wish to filter the classroom field so only children in a certain room are displayed, or only people who are not missing a classroom (non-blanks) are displayed.

   **Hint:** Filtering by non-blanks for classrooms eliminates all adults from the list.

h. To group by a field, such as grouping all children in the same class together, right-click the heading and choose Group By This Column, or click & drag the field to the “group by” area just above the column headings. To ungroup right-click the heading again and choose Ungroup or click & drag the field back to the columnar part of the screen.

i. Adjust the column width and row height manually if needed or check the boxes to Fit Columns to View or Row Auto Height. Choose Wrap Text if you do not wish fields to be truncated.

6. Optional: Add totals to your data view.
7. When you are satisfied with the layout you may *Print* the information as is or *Export* it to another format like PDF, XLS, CSV or HTML.
8. Click *Save > Exit*. 