



## **OrgPublisher Summary Fields**

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# Summary Fields

Summary fields generate a new field using the value in another custom field. A summary field can also count how many people are members of specific populations within the organizational chart.

## Summary Field Calculation Options

The following calculation options are available for Numeric or Currency fields:

- Sum
- Average
- Maximum
- Minimum
- Percentage

Summary field data can be displayed in the *Summary View* and the chart box. By default, the *Summary View* displays counts of all employees by position type. As you create groups the counts for members in each group also appear.

For more information, see the Search and Groups document.

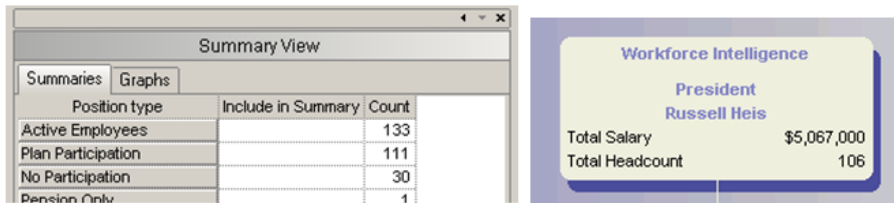


Figure 1.

## Creating a Summary Field

Numeric or currency fields used for summary field generation must not contain characters, such as commas “,” or currency designators “\$”.

1. Open your chart in OrgPublisher and verify that numerical or currency fields exist in the chart.
2. Select **Data** from the menu bar then **Custom field properties** from the options list. The *Custom Field Properties* dialog opens.
3. If the field you want to summarize is not set as numeric or currency, click the drop-down arrow in the **Type** column. Select **Currency** or **Numeric**.

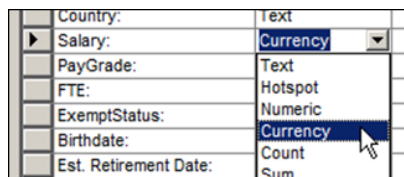


Figure 2.

- Click inside the first blank field in the **Field label** column and type the name for the new summary field.

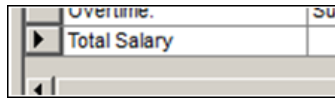


Figure 3.

- Click the drop-down arrow in the **Type** field and select the appropriate summary descriptor, **Sum**, **Average**, **Minimum**, **Maximum**, or **Percentage**.

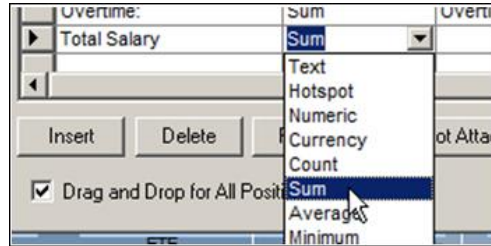


Figure 4.

- Click the drop-down arrow in the **Calc Field** and select the numeric field you want to calculate.

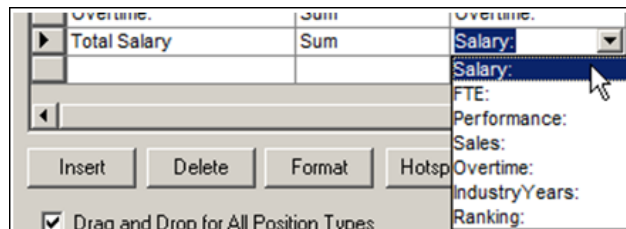


Figure 5.

- Click the drop-down arrow in the **Population** field and select the position type or group for which you are creating the calculation.

In the following example, the summary is for **Salary** for the **Total Head Count**. You can also select the **Manager** option to summarize salary only for managers.

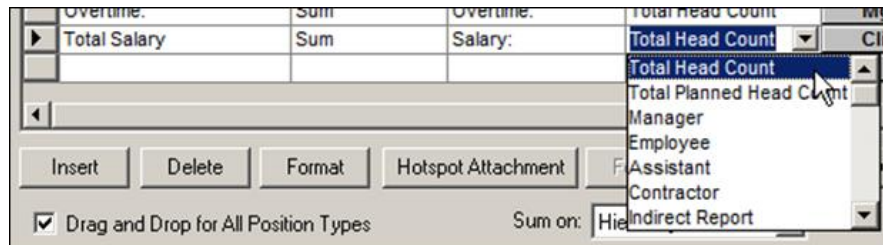


Figure 6.

- Click the **Click to assign** button in the **Assigned To** column. The *Update Assigned Custom Fields* dialog opens.

9. Select the **Position type** where you want to display the summary field. Click **OK**.

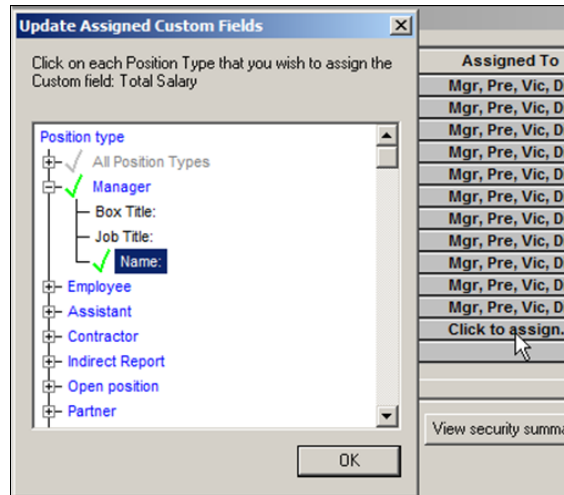


Figure 7.

The summary field displays in the chart for the selected position types.



Figure 8.

10. You can change the default option to include managers in the total head count. Select **Options** in the menu bar then **Summary options**. Select **Exclude managers from their own totals**.

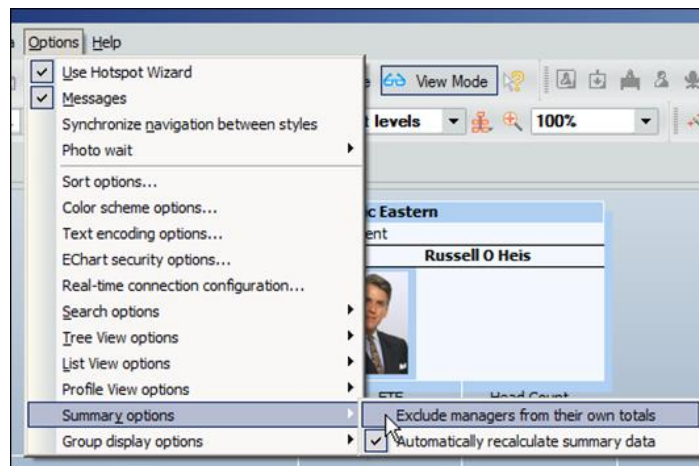


Figure 9.



Figure 10.

You can create a summary field for each position type or group you want to calculate. The summary fields also appear in the *Summary View*.

### Groups in Summary Fields

You can use groups as the population when you create summary fields.

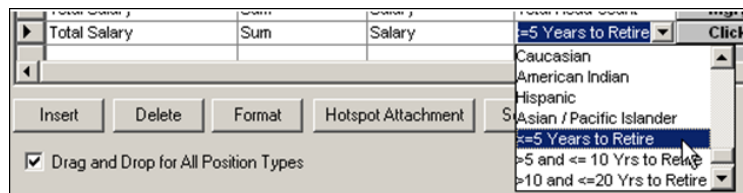


Figure 11.

Results display in the *Summary View* or in the *Chart View*. When in the *Summary View*, numbers display for the current top of chart down. As you drill up or down in the chart, the numbers reflect totals from the new top of chart down.

Summary View			
Summaries		Graphs	
Position type	Include in Summary	Count	Total Salary
President	Yes		
Vice President	Yes	3	
Director	Yes	5	
Manager	Yes	38	
Employee	Yes	98	
Assistant	Yes	9	
<b>Total Head Count</b>		<b>153</b>	<b>\$7,087,000</b>
Open position	Yes	13	
<b>Total Planned Head Count</b>		<b>166</b>	
<=5 Years to Retire		24	\$1,168,000

Figure 12.