

# OrgPublisher Summary Fields



## **OrgPublisher 10 Training**

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**Table of Contents**

- 1 Summary Field Calculation Options ..... 1
- 2 Creating a Summary Field ..... 2
- 3 Groups Used in Summary Fields..... 5

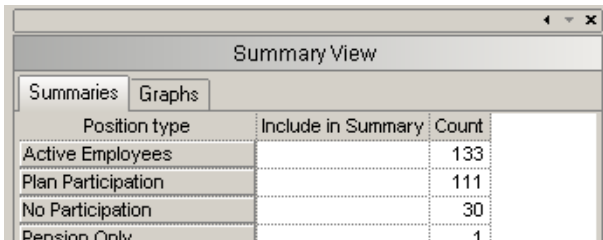
## 1 Summary Field Calculation Options

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.

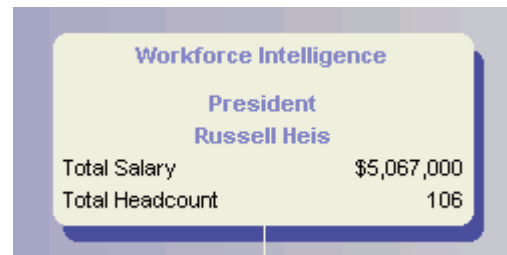
The following calculation options are available for Numeric or Currency Fields:

- Sum
- Average
- Maximum
- Minimum
- Percentage

Summary Field data can be displayed in the Summary View and in the Chart Box. By default the Summary View displays counts of all employees by Position Type. As you create Groups, counts for members in each group will also display. To read more, see the *Search and Group* manual.



Position type	Include in Summary	Count
Active Employees		133
Plan Participation		111
No Participation		30
Pension Only		1

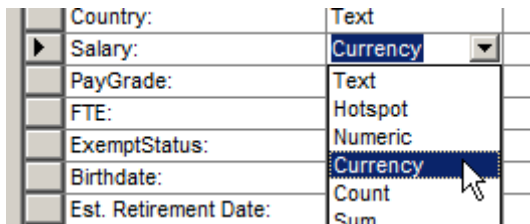


Workforce Intelligence	
President Russell Heis	
Total Salary	\$5,067,000
Total Headcount	106

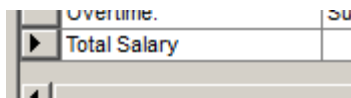
## 2 Creating a Summary Field

Numeric or Currency fields that will be used for Summary Field generation should not contain “,” or “\$”.

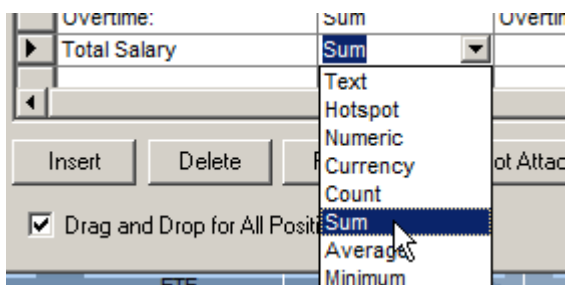
1. Open your chart in OrgPublisher. Verify that you have created Custom Fields with numerical or currency data.
2. Select **Data** from the menu bar, then **Custom Field Properties** from the menu. The *Custom Field Properties* dialog opens.
3. If the field to be summarized is not numeric or currency, click the **Type** drop-down arrow for the **Field label** you want to summarize. Select **Currency** or **Numeric**.



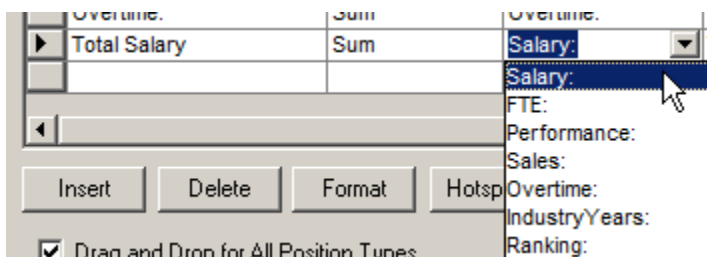
4. Click in the first blank **Field label** and type the label name for the new summary field.



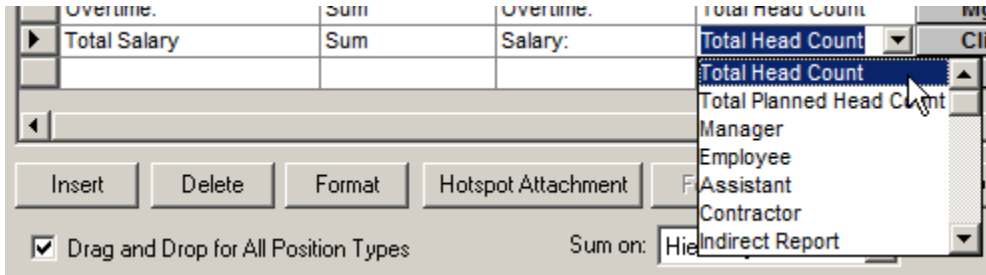
5. Click the **Type** field drop-down arrow and select **Sum, Average, Minimum, Maximum** or **Percentage** from the options list. This determines how the field calculates your summary.



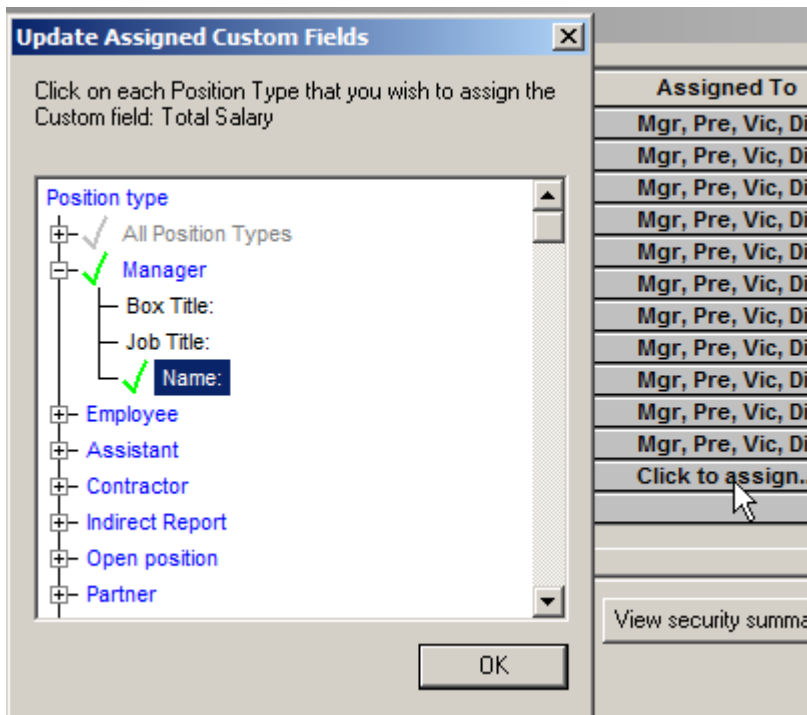
6. Click the **Calc Field** drop-down arrow and select the numeric field you want to calculate.



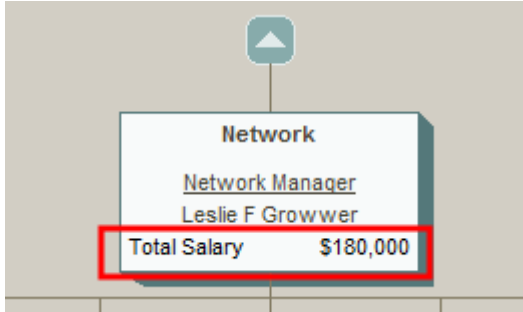
- Click the **Population** drop-down arrow to select the Position Type or Group for which you are making the calculation. In this example, we will summarize **Salary** for the **Total Head Count**. If the **Manager** option had been selected, salary would have been totaled for managers.



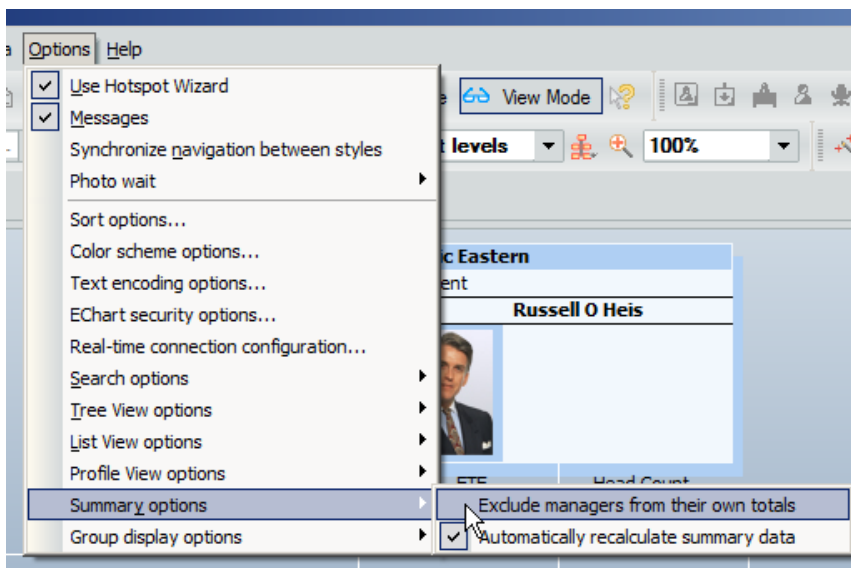
- Click **<Click to assign>**. The *Update Assigned Custom Fields* dialog opens. Select the Position Types in which you want to display the Summary field. Click **OK**.



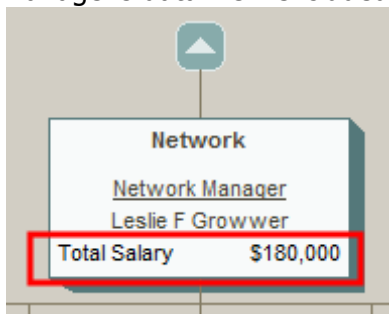
- The Summary field displays in your chart for the selected Position Types.



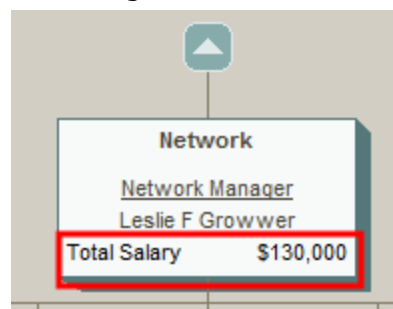
- By default, the numeric field is rolled in to Manager's total. This option can be set to exclude Manager from their own totals by clicking on Options, Summary options, and then click to place a check mark beside Exclude managers from their own totals.



Manager's data NOT excluded



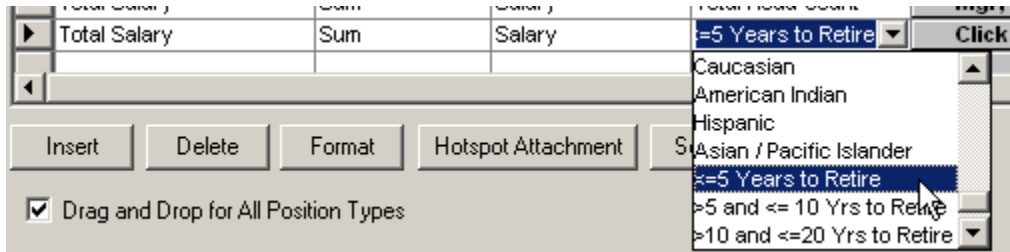
Manager's data excluded



- You can create a Summary Field for each Position Type or Group you need calculated. The Summary Fields also appear in the Summary View.

### 3 Groups Used in Summary Fields

1. Groups can be used as the population when summary fields are created.



2. Results will display in the Summary View or displayed in the chart.
3. When displayed in Summary View, numbers for the current top of chart down will be displayed. As the user drills up, the numbers will reflect totals from the new top of chart down.

Summary View				
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		
Total Head Count			153	\$7,087,000
Open position	Yes	13		
Total Planned Head Count			166	
<=5 Years to Retire			24	\$1,168,000