Summaries

Overview

Summaries create aggregated totals in order to provide the user with higher level data as part of a more detailed report. There are several types of summary that can be included in a table:

1. Field Totals
2. Categorical Sub Totals
3. Section Totals
4. Section Summary Tables
5. Grand Totals

Depending on the type of summary you are creating, you will have access to a selection of the following types:

1. Σ **Sum** - this will add all of the values in the field to create the total.

2. % **Average** - this will find the mean value of all the values in the field to create the total.

3. # **Count** - this will count the number of values in the field to create the total.

4. #! **Count Distinct** - this will count the number of unique values in the field to create the total.

5. $f(x)$ **Calculated Total** - this is only available if the field is a calculation, and uses the calculation to create the total.

Standard Table Summaries

Total Aggregation

Year	Invoiced	Athletes
2007	$17,633,473	127
2008	$8,611,470	138
2009	$11,012,244	563
2010	$81,690,100	630
2011	$158,353,519	795
2012	$152,912,577	848
2013	$28,199,351	736
2014	$12,522,605	50
	$470,935,339	

There are two methods for adding a total to a field in a standard Column or Row based table:

Field Drop Down

1. Click on the field's drop down menu, in either of these locations:
   a. Through the Columns/Rows list

Columns	⬜ Year	🔵 Invoiced Amo... ▼
Rows		

   b. Through the Table Preview

Year ▼	Invoiced Amount ▼
2007	$3,349
2007	$3,525
2007	$5,122
2007	$5,360
2007	$5,392
2007	$5,580
2007	$6,628

2. Select the Total option from the list and click on the aggregation you wish to use for the summary.

Year ▼	Invoiced ▼	Athletes ▼		
2007	$17,5	**Invoiced**		
2008	$8,6	Σ Aggregation ▸		
2009	$11,0	Sort ▸		
2010	$81,5	Advanced Function		
2011	$158,3	Format		
2012	$152,0	Clear Formatting		
2013	$28,1	Conditional Formatting		
2014	$12,5	Totals ▸	None	
		Hide Field	Σ Sum	
		Delete	% Average	
			# Count	
			₀₁ Count Distinct	

3. You should now have a total on your field.

Year ▼	Invoiced ▼	Athletes ▼
2007	$17,633,473	127
2008	$8,611,470	138
2009	$11,012,244	563
2010	$81,690,100	630
2011	$158,353,519	795
2012	$152,912,577	848
2013	$28,199,351	736
2014	$12,522,605	50
	$470,935,339	

Column Formatting menu

1. Click on the Column Formatting menu in the main navigation bar of the page
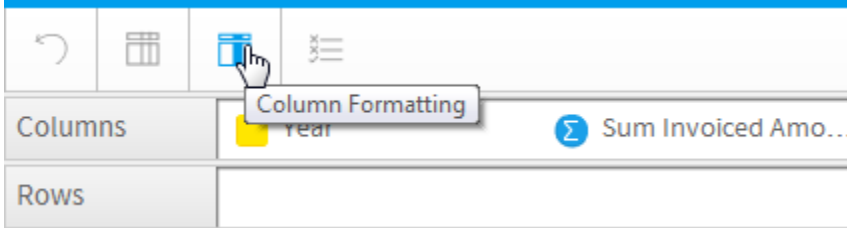
2. Select the field you wish to apply a total to in the Report Fields list panel on the left of the menu
3. Open the Summary section of the menu to view the available options
4. Define the Total Aggregation option.
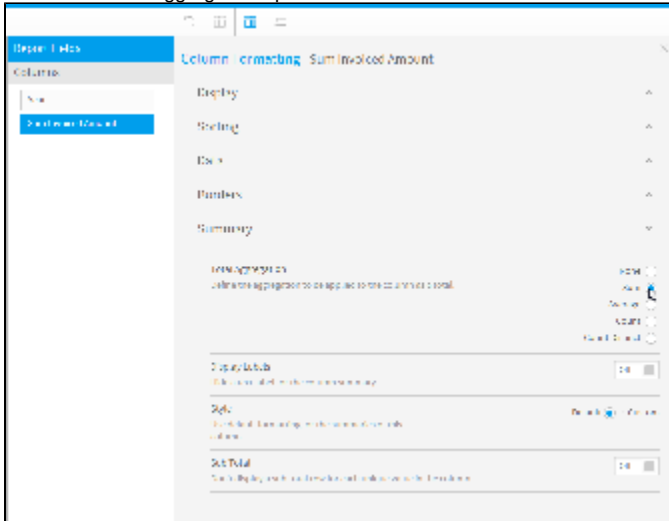
You will notice that using the Column Formatting menu rather than the Field Drop Down list means that you have a range of additional options, rather than just the ability to select the aggregation to use. These will be explored below.

5. You should now have a total on your field.

Year	Invoiced	Athletes
2007	$17,633,473	127
2008	$8,611,470	138
2009	$11,012,244	563
2010	$81,690,100	630
2011	$158,353,519	795
2012	$152,912,577	848
2013	$28,199,351	736
2014	$12,522,605	50
	$470,935,339	

Display Labels

Year ▾	Invoiced ▾
2007	$17,633,473
2008	$8,611,470
2009	$11,012,244
2010	$81,690,100
2011	$158,353,519
2012	$152,912,577
2013	$28,207,858
2014	$12,522,605
	Sum: $470,943,846

1. Click on the Column Formatting menu in the main navigation bar of the page

Columns	Year	Σ Sum Invoiced Amo…
Rows		
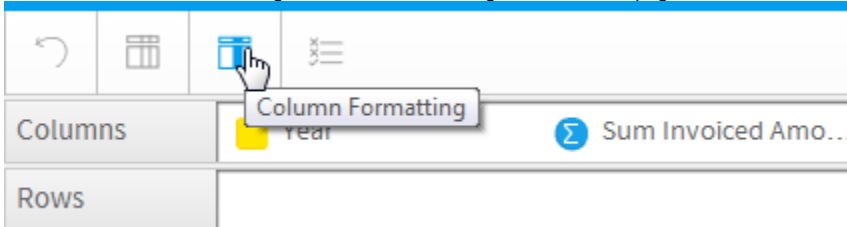
2. Select the field you wish to apply labels to in the Report Fields list panel on the left of the menu
3. Open the Summary section of the menu to view the available options
4. Set **Display Labels** to **On**
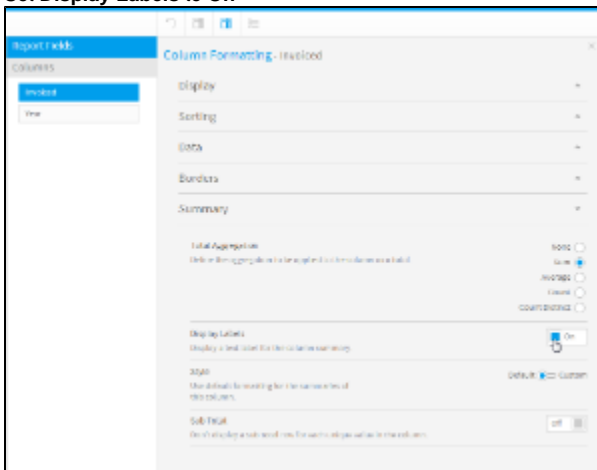
5. You should now have a label on your total. The label will reflect the aggregation used for the total and cannot be customised.

Year	Invoiced
2007	$17,633,473
2008	$8,611,470
2009	$11,012,244
2010	$81,690,100
2011	$158,353,519
2012	$152,912,577
2013	$28,207,858
2014	$12,522,605
	Sum: $470,943,846

Style

Year	Invoiced
2007	$17,633,473
2008	$8,611,470
2009	$11,012,244
2010	$81,690,100
2011	$158,353,519
2012	$152,912,577
2013	$28,207,858
2014	$12,522,605
	Sum: $470,943,846

1. Click on the Column Formatting menu in the main navigation bar of the page

Column Formatting

Columns	Year	Σ Sum Invoiced Amo...
Rows		

2. Select the field you wish to style the total of in the Report Fields list panel on the left of the menu
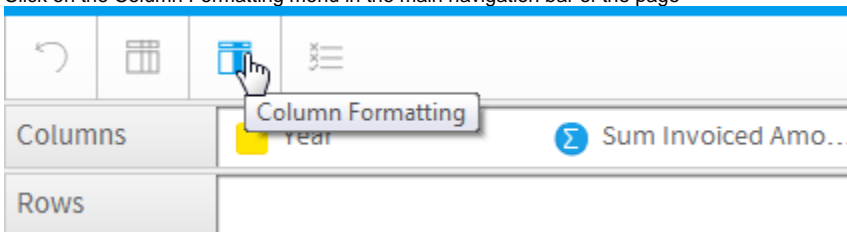3. Open the Summary section of the menu to view the available options

4. Set **Style** to **Custom**
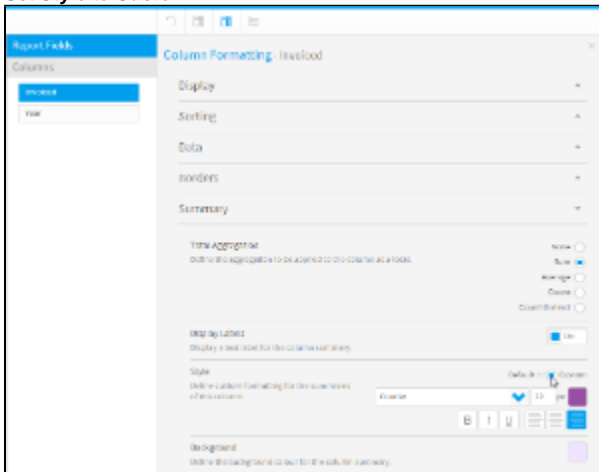
5. Apply the formatting you wish to use. This will only customise the look of the total cell for the field selected.

Year	Invoiced
2007	$17,633,473
2008	$8,611,470
2009	$11,012,244
2010	$81,690,100
2011	$158,353,519
2012	$152,912,577
2013	$28,207,858
2014	$12,522,605
	Sum: $470,943,846

Sub Total

Year	Quarter	Invoiced
2012	Quarter 1	$14,604,660
	Quarter 2	$832,122
	Quarter 3	$41,453,312
	Quarter 4	$96,022,483
2012		Sum: $152,912,577
2013	Quarter 1	$12,869,675
	Quarter 2	$947,281
	Quarter 3	$944,589
	Quarter 4	$13,446,313
2013		Sum: $28,207,858
2014	Quarter 1	$12,522,605
2014		Sum: $12,522,605
		Sum: $193,643,041

Sub Totals are used when there are multiple records per category, possibly caused by having multiple dimension fields in a table, and it would be beneficial to view a total value for each category value. The example shown here could use a sub total for Year, as there are multiple rows per year value due to the Quarter field.

Year	Quarter	Invoiced
2012	Quarter 1	$14,604,660
2012	Quarter 2	$832,122
2012	Quarter 3	$41,453,312
2012	Quarter 4	$96,022,483
2013	Quarter 1	$12,869,675
2013	Quarter 2	$947,281
2013	Quarter 3	$944,589
2013	Quarter 4	$13,446,313
2014	Quarter 1	$12,522,605
		Sum: $193,643,041

Note: in order to have a sub total display, you **must** have a total applied to the column you wish to populate the sub total row. For example, in the table above you will set the sub total on the Year category field, but you will have the total applied to the Invoiced field.

1. Click on the Column Formatting menu in the main navigation bar of the page
2. Select the category you wish to create a sub total for in the Report Fields list panel on the left of the menu
3. Open the Summary section of the menu to view the available options

4. Set **Sub Total** to **On**.
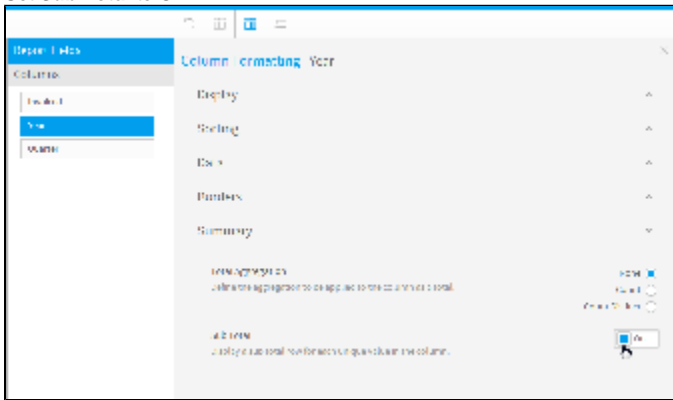
5. You will now have a sub total row for each category value, populated by any metric that already has a total applied to it.

Year	Quarter	Invoiced
2012	Quarter 1	$14,604,660
2012	Quarter 2	$832,122
2012	Quarter 3	$41,453,312
2012	Quarter 4	$96,022,483
2012		Sum: $152,912,577
2013	Quarter 1	$12,869,675
2013	Quarter 2	$947,281
2013	Quarter 3	$944,589
2013	Quarter 4	$13,446,313
2013		Sum: $28,207,858
2014	Quarter 1	$12,522,605
2014		Sum: $12,522,605
		Sum: $193,643,041

When using Sub Totals, we often pair this functionality with the Suppress Duplicates option, to make the report output easier to consume. To apply this option:

1. Click on the Column Formatting menu in the main navigation bar of the page
2. Select the category you applied the sub total to in the Report Fields list panel on the left of the menu
3. Set the **Suppress Duplicates** option to **On**.
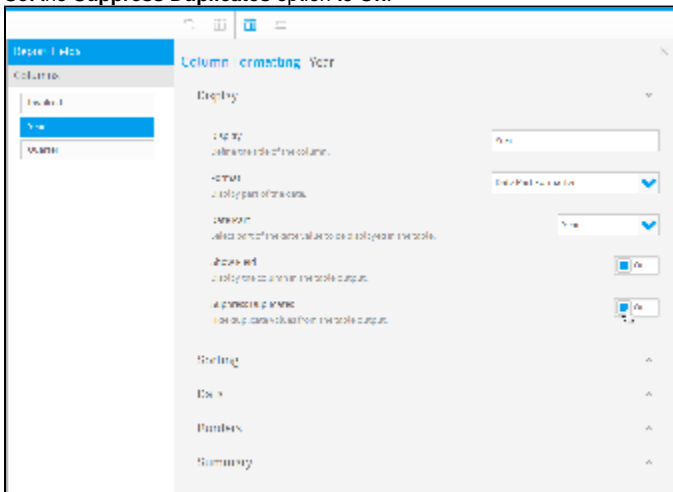
4. You will now have a clearer report output

Year	Quarter	Invoiced
2012	Quarter 1	$14,604,660
	Quarter 2	$832,122
	Quarter 3	$41,453,312
	Quarter 4	$96,022,483
2012		Sum: $152,912,577
2013	Quarter 1	$12,869,675
	Quarter 2	$947,281
	Quarter 3	$944,589
	Quarter 4	$13,446,313
2013		Sum: $28,207,858
2014	Quarter 1	$12,522,605
2014		Sum: $12,522,605
		Sum: $193,643,041

Section Summaries

Section Summary

Gender	Athletes	Avg Age	Invoiced
Female	1599	32	$150,322,813
Male	2288	35	$320,612,526

Gender: Female

Demographic ▾	Athletes ▾	Avg Age ▾	Invoiced ▾
Adventure	549	29	$83,212,854
Culture	156	34	$754,951
Family	287	28	$7,879,590
Luxury	201	36	$43,831,215
Relaxation	173	37	$8,209,006
Sport	233	29	$6,435,198
	1599	32	$150,322,813

(Top)

Gender: Male

Demographic ▾	Athletes ▾	Avg Age ▾	Invoiced ▾
Adventure	930	32	$134,323,098
Culture	212	36	$1,078,368
Family	369	32	$37,380,013
Luxury	98	35	$107,675,539
Relaxation	232	40	$8,849,848
Sport	447	32	$31,305,660
	2288	35	$320,612,526

(Top)

1. Click on the Section Formatting menu in the main navigation bar of the page
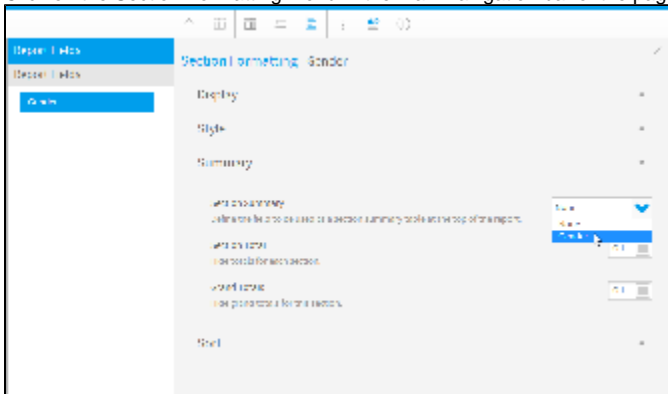
2. Select the section field you wish to use as the category in the section summary table at the top of the report

3. Close the menu. You will now have a section summary table at the top of the page that links down to each individual section

Gender	Athletes	Avg Age	Invoiced
Female	1599	32	$150,322,813
Male	2288	35	$320,612,526

Gender: Female

Demographic ▼	Athletes ▼	Avg Age ▼	Invoiced ▼
Adventure	549	29	$83,212,854
Culture	156	34	$754,951
Family	287	28	$7,879,590
Luxury	201	36	$43,831,215
Relaxation	173	37	$8,209,006
Sport	233	29	$6,435,198
	1599	32	$150,322,813

(Top)

Gender: Male

Demographic ▼	Athletes ▼	Avg Age ▼	Invoiced ▼
Adventure	930	32	$134,323,098
Culture	212	36	$1,078,368
Family	369	32	$37,380,013
Luxury	98	35	$107,675,539
Relaxation	232	40	$8,849,848
Sport	447	32	$31,305,660
	2288	35	$320,612,526

(Top)

Section Total & Labels

Gender: Female

Demographic ▼	Athletes ▼	Avg Age ▼	Invoiced ▼
Adventure	549	29	$83,212,854
Culture	156	34	$754,951
Family	287	28	$7,879,590
Luxury	201	36	$43,831,215
Relaxation	173	37	$8,209,006
Sport	233	29	$6,435,198
	1599	32	$150,322,813
Total for Gender: Female			
	1599	32	$150,322,813

1. Click on the Section Formatting menu in the main navigation bar of the page
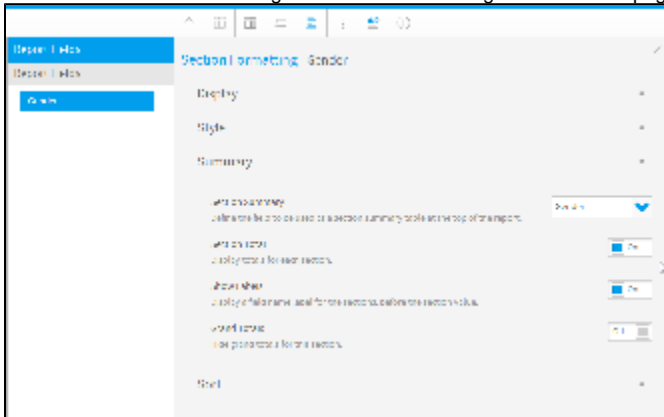
2. Enable the Section Total and Show Labels options as desired
3. You will now have a total row for each section of the report

Gender: Female

Demographic ▼	Athletes ▼	Avg Age ▼	Invoiced ▼
Adventure	549	29	$83,212,854
Culture	156	34	$754,951
Family	287	28	$7,879,590
Luxury	201	36	$43,831,215
Relaxation	173	37	$8,209,006
Sport	233	29	$6,435,198
	1599	32	$150,322,813
Total for Gender: Female			
	1599	32	$150,322,813

Grand Totals

Gender: Male

Demographic ▾	Athletes ▾	Avg Age ▾	Invoiced ▾
Adventure	930	32	$134,323,098
Culture	212	36	$1,078,368
Family	369	32	$37,380,013
Luxury	98	35	$107,675,539
Relaxation	232	40	$8,849,848
Sport	447	32	$31,305,660
	2288	35	$320,612,526
Total for Gender: Male			
	2288	35	$320,612,526
Grand Totals			
	3887	33	$470,935,339

(Top)

1. Click on the Section Formatting menu in the main navigation bar of the page
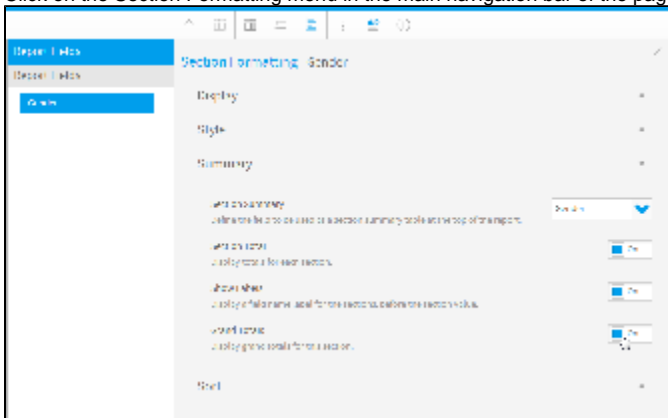
2. Enable the Grand Totals option
3. You will now have a single Grand Total row at the bottom of the last section that totals up the entire report.

Gender: Male

Demographic ▾	Athletes ▾	Avg Age ▾	Invoiced ▾
Adventure	930	32	$134,323,098
Culture	212	36	$1,078,368
Family	369	32	$37,380,013
Luxury	98	35	$107,675,539
Relaxation	232	40	$8,849,848
Sport	447	32	$31,305,660
	2288	35	$320,612,526
Total for Gender: Male			
	2288	35	$320,612,526
Grand Totals			
	3887	33	$470,935,339

(Top)

Cross Tab Summaries

Column Totals

Athletes	Age Group at Camp									
Year	0 - 14	15 - 19	20 - 24	25 - 29	30 - 34	35 - 39	40 - 44	45 - 49	50 - 54	55 +
2007	20	13	0	7	21	15	19	22	10	0
2008	11	11	32	15	32	17	7	8	5	0
2009	0	91	66	30	63	143	62	48	55	5
2010	0	106	147	61	56	104	60	51	32	13
2011	0	142	134	91	68	147	78	58	57	20
2012	0	125	157	82	60	174	80	68	75	27
2013	0	91	110	93	60	136	99	53	62	32
2014	0	0	29	20	1	0	0	0	0	0
Total	31	579	675	399	361	736	405	308	296	97

1. Click on the field drop down menu of the Column header in the report preview
2. Select the **Column Totals** option from the drop down list

Athletes	Age Group at Camp									Age Group at Camp
Year	0 - 14	15 - 19	20 - 24	25 - 29	30 - 34	35 - 39	40 - 44	45 - 49	50 - 54	
2007	20	13	0	7	21	15	19	22	10	Format
2008	11	11	32	15	32	17	7	8	5	Clear Formatting
2009	0	91	66	30	63	143	62	48	55	Conditional Formatting
2010	0	106	147	61	56	104	60	51	32	Group Data
2011	0	142	134	91	68	147	78	58	57	Column Totals
2012	0	125	157	82	60	174	80	68	75	
2013	0	91	110	93	60	136	99	53	62	Delete
2014	0	0	29	20	1	0	0	0	0	

3. You will now have a total row for each column

Athletes	Age Group at Camp									
Year	0 - 14	15 - 19	20 - 24	25 - 29	30 - 34	35 - 39	40 - 44	45 - 49	50 - 54	55 +
2007	20	13	0	7	21	15	19	22	10	0
2008	11	11	32	15	32	17	7	8	5	0
2009	0	91	66	30	63	143	62	48	55	5
2010	0	106	147	61	56	104	60	51	32	13
2011	0	142	134	91	68	147	78	58	57	20
2012	0	125	157	82	60	174	80	68	75	27
2013	0	91	110	93	60	136	99	53	62	32
2014	0	0	29	20	1	0	0	0	0	0
Total	31	579	675	399	361	736	405	308	296	97

Row Totals

Athletes	Age Group at Camp										Total
Year	0 - 14	15 - 19	20 - 24	25 - 29	30 - 34	35 - 39	40 - 44	45 - 49	50 - 54	55 +	
2007	20	13	0	7	21	15	19	22	10	0	127
2008	11	11	32	15	32	17	7	8	5	0	138
2009	0	91	66	30	63	143	62	48	55	5	563
2010	0	106	147	61	56	104	60	51	32	13	630
2011	0	142	134	91	68	147	78	58	57	20	795
2012	0	125	157	82	60	174	80	68	75	27	848
2013	0	91	110	93	60	136	99	53	62	32	736
2014	0	0	29	20	1	0	0	0	0	0	50

1. Click on the field drop down menu of the Column header in the report preview
2. Select the **Column Totals** option from the drop down list

Athletes	Age Group at Camp									
Year	0 - 14	15 - 19	20 - 24	25 - 29	30 - 34	35 - 39	40 - 44	45 - 49	50 - 54	55 +
200	**Year**				21	15	19	22	10	0
200	Format				32	17	7	8	5	0
200	Clear Formatting				63	143	62	48	55	5
201					56	104	60	51	32	13
201	Conditional Formatting				68	147	78	58	57	20
201	Group Data				60	174	80	68	75	27
201	Row Totals				60	136	99	53	62	32
201	Delete				1	0	0	0	0	0

3. You will now have a total row for each column

Athletes	Age Group at Camp										Total
Year	0 - 14	15 - 19	20 - 24	25 - 29	30 - 34	35 - 39	40 - 44	45 - 49	50 - 54	55 +	
2007	20	13	0	7	21	15	19	22	10	0	127
2008	11	11	32	15	32	17	7	8	5	0	138
2009	0	91	66	30	63	143	62	48	55	5	563
2010	0	106	147	61	56	104	60	51	32	13	630
2011	0	142	134	91	68	147	78	58	57	20	795
2012	0	125	157	82	60	174	80	68	75	27	848
2013	0	91	110	93	60	136	99	53	62	32	736
2014	0	0	29	20	1	0	0	0	0	0	50