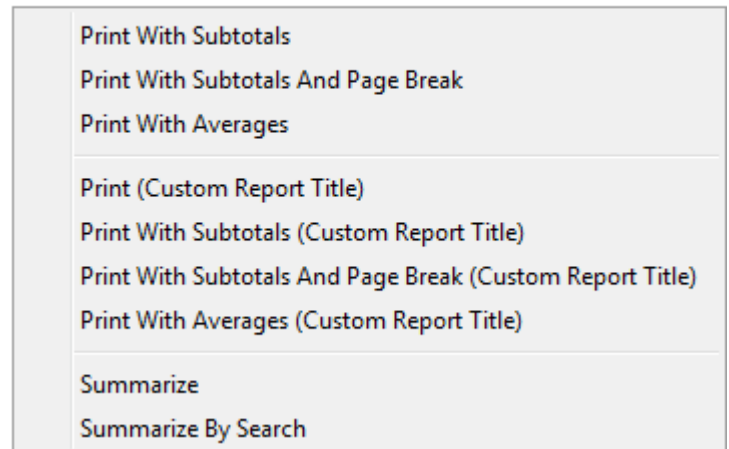




A List Summarize feature, accessed via the Print Options menu, will summarize the data displayed in the list, based upon your sort selection.

This feature is available on all list views throughout AwareManager JXT.



### Summarize

Once Summarize is chosen from the Print with Options feature, you will be presented with a few options about the summary report:

#### Report Destination

- Your list can be created as a Report for easy viewing and printing.
- The report can be sent to the Clipboard and then pasted into Excel as a method for quickly creating graph.

#### Summarize By

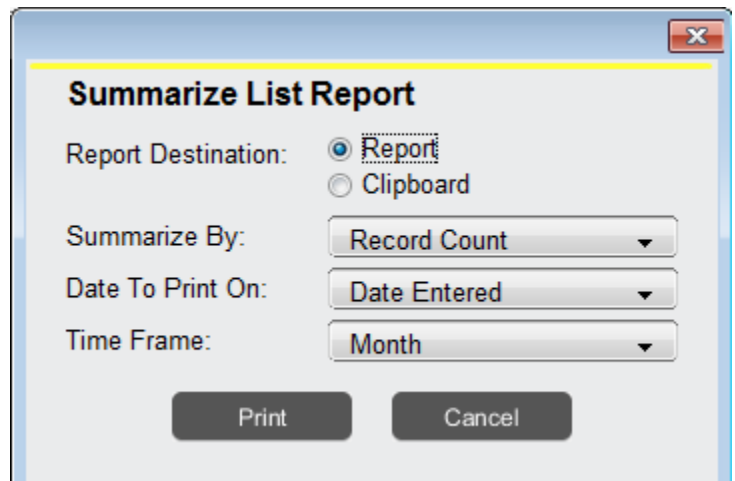
If there are any numerical (currency or number) fields in the list, they will be available as subtotal options, otherwise the only option will be Record Count.

#### Date To Print On (Optional)


According to the date columns in your list, they will be available to choose from in this drop down menu. You must have at least one date in your list to use this version of the feature.

#### Time Frame (Optional)


- *Month*: the report can be summarized by month.
- *Note*: for Monthly summarizing to work, only records from one year can be visible in your report.
- *Year*: the report can be summarized by year.



**Example without Date Option:**

		<b>Summarize List Report</b> <b>DIG Property Group</b> 50 Congress Street Boston, Massachusetts 02109	
Search Ranges:	Summarized By: Total Charge		
Work Type	Total Charge	Date Closed	
CARPENTRY	\$1,007.22		
CONFERENCE ROOM	\$279.06		
ELEC	\$365.33		
FREIGHT	\$1,311.50		
FREIGHT EL	\$900.00		
HVAC-HOT	\$320.00		
HVAC-OT	\$603.75		
KEYS	\$88.00		
LIGHTS	\$151.18		
PLUMB	\$111.02		
SIGNAGE	\$104.50		

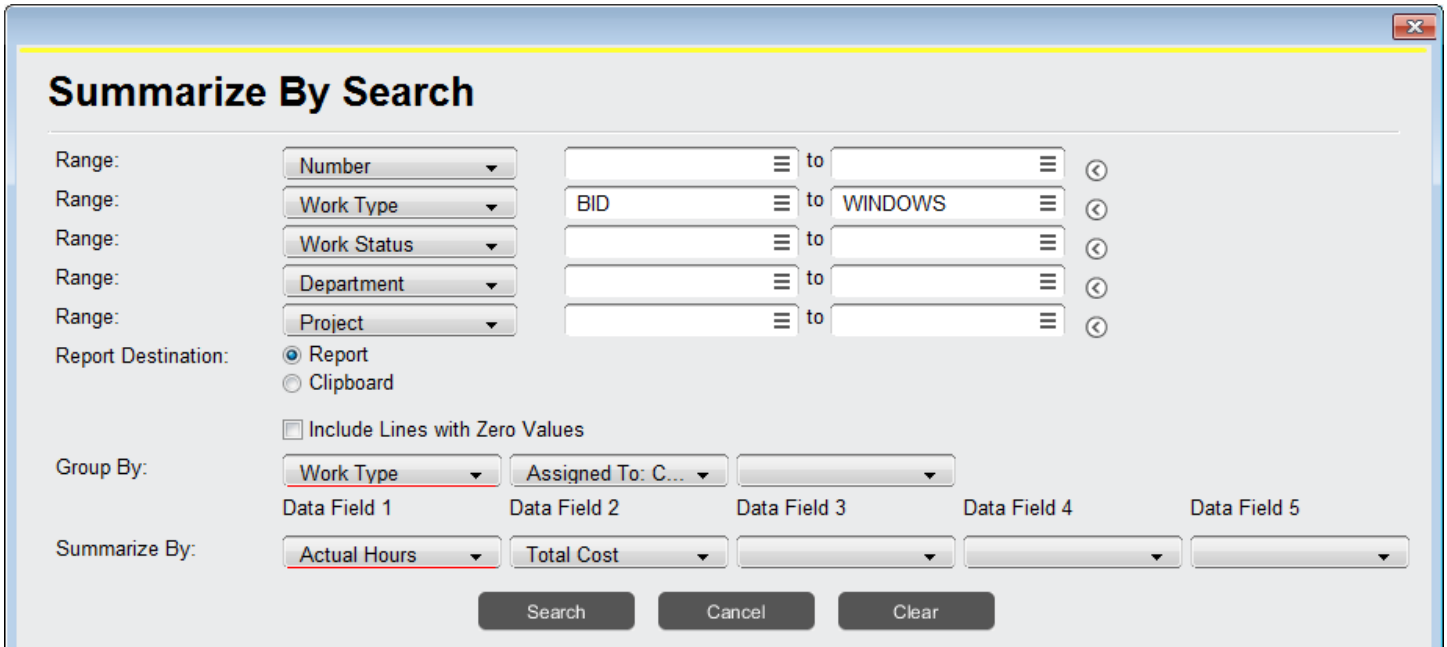
**Example with Date Option:**

		<b>Summarize List Report</b> <b>DIG Property Group</b> 50 Congress Street Boston, Massachusetts 02109											
Search Ranges:	Date To Print On: Date Entered	Time Frame: Month											
	Summarized By: Record Count												
Client	Records	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
ACTADV	6			2								2	2
ALLPROBASEBA...	5										4		1
ALLPWR	6					1		1		2	2		
ATLNTCWTR	1												1
BELFORT	3									3			
BIGBANG	1	1											
BIRDS	1			1									
BUNKERBED	1												1
CAPEADVERT	4								1	3			
CAPEPEARL	1			1									
CASTLEPROP	1					1							
DIGGEMUP	6	2				1		1	1	1			
EASTON	1			1									
FIREHOUSE	1					1							
GREENDOG	4							1	1	1	1		
GREENMNSTR	5	5											
JGC&M	1									1			
KELLYSCLAMS	4							1	1		2		
MAPKBRWNG	1										1		
MUSCLES	4		1			1			1	1			
PATSPRIDE	1					1							
PLYMROCKS	3												3
SALEMCOST	2	1							1				
STADIUM	2			1									
STMSHPGLS	1	1										1	
TINYSTAF	4				2					1	1		
TRIGONSLVR	1					1							
<b>Totals</b>	<b>71</b>	<b>10</b>	<b>1</b>	<b>6</b>	<b>2</b>	<b>7</b>	<b>0</b>	<b>4</b>	<b>6</b>	<b>13</b>	<b>11</b>	<b>3</b>	<b>8</b>

### Summarize by Search

Also found on the Print Options menu in all capsules, this feature builds a list of potential result lines by finding all of the combinations of First Sort, Secondary Sort, and Third Sort values that fall within the search ranges. The results are then summarized by the selected Data Fields.

This summarize feature makes it possible to bypass Excel's record limit by summarizing data before pasting it into a spreadsheet. This feature is still under development, ask your Client Manager for more information before using it.



### Report Destination

- Your list can be created as a Report for viewing and printing.
- The report can be sent to the Clipboard and then pasted into Excel as a method for quickly creating graphs and pivot charts.

### Include Lines with Zero Values

If this option is checked, this constraint is applied after the operation has processed the information and all lines that have zero values will display if this option is checked.


### Group By

The report can be sorted by any value associated with the record type of the capsule you are working within.

### Summarize By

The report can be summarized by fields with yes/no values (e.g. Billable) or with numeric values.

Example using search criteria from above screenshot:

		<b>Summarize List Report</b> <b>DIG Property Group</b> 50 Congress Street Boston, Massachusetts 02109	
Search Ranges:		Work Type: CARPENTRY To TRASH	
Work Type	Assigned To	Actual Hours	Total Cost
CARPENTRY		1.000	\$116.50
CARPENTRY	CARPET ONE	0.000	\$17.95
CARPENTRY	MACK.JOE	11.283	\$632.65
CARPENTRY	POLO.MARCO	19.000	\$784.25
CLEAN	CALIFAX.MACK	1.916	\$88.67
CLEAN	CARPET ONE	3.083	\$653.07
CLEAN	MACK.JOE	1.750	\$48.00
CONFERENCE ROOM	CALIFAX.MACK	1.000	\$30.00
CONFERENCE ROOM	MACK.JOE	3.000	\$150.00
CONFERENCE ROOM	POLO.MARCO	1.000	\$50.00
CONSTRUCT	BAGGADONUTS.JOEY	24.500	\$1,357.20
CONSTRUCT	CALGARY.JOHNSTON	4.483	\$560.00
ELEC		0.000	\$71.80
ELEC	CALGARY.JOHNSTON	3.000	\$84.33
ELEC	FIXUP.FRANK	1.000	\$60.00
ELEC	MACK.JOE	4.000	\$128.15
FREIGHT	BLINKY.BILL	1.000	\$0.00
FREIGHT	ENG	12.000	\$500.00
FREIGHT	MACK.JOE	1.750	\$87.50
FREIGHT EL	BROWN.CHARLIE	0.000	\$900.00
HVAC-COLD	BAGGADONUTS.JOEY	1.333	\$33.25
HVAC-COLD	BLINKY.BILL	0.133	\$3.33
HVAC-COLD	ENG	5.000	\$175.00
HVAC-COLD	FIXUP.FRANK	4.833	\$260.82
HVAC-COLD	JULES.CARMINE	1.383	\$41.49
HVAC-COLD	MACK.JOE	0.684	\$34.20
HVAC-COLD	MELTY.CRYSTAL	10.617	\$96.00
HVAC-COLD	SLIDER.TOM	0.250	\$0.00
HVAC-COLD	WEBTEST	1.183	\$0.00
HVAC-HOT	FIXUP.FRANK	0.917	\$45.85
HVAC-HOT	MACK.JOE	3.417	\$320.85

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