

EMu v.5

Displaying records - summarizing records

Last updated 29-01-2025



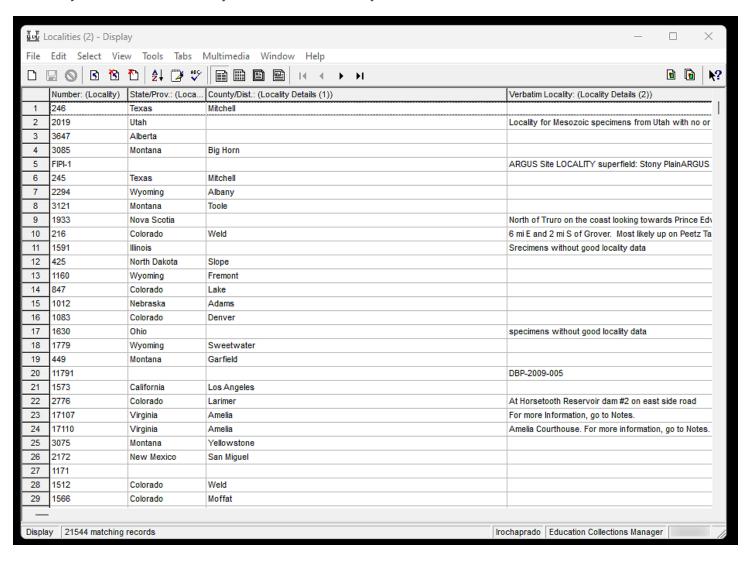
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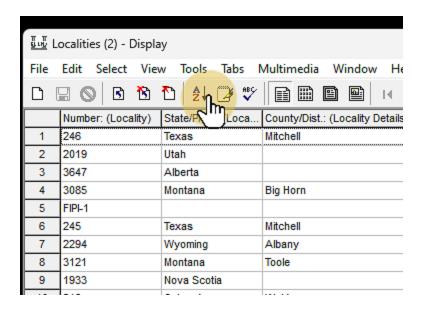
Before sorting the records, EMu can display a summary for you

We are logged in as an Education Collections Manager. We are viewing the results of a search in the Localities module, where the Locality Number field could be anything (except for empty). The current View chosen displays the Locality Number, State, County and Verbatim Locality fields.





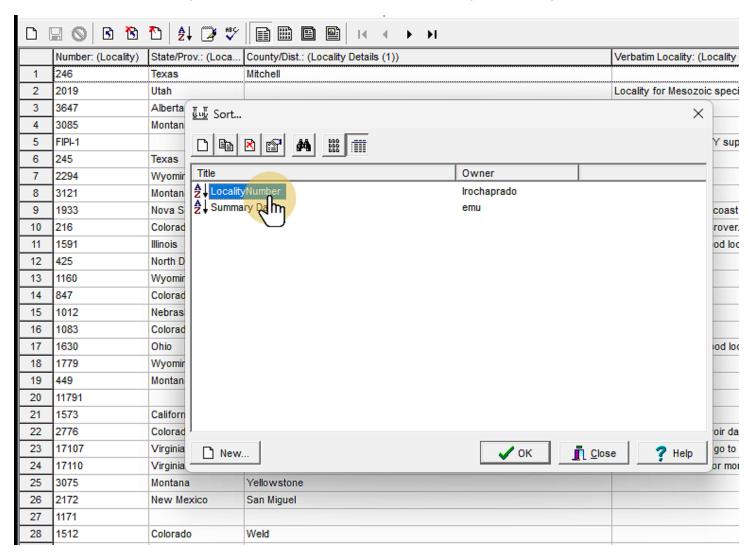
2 Click the sort icon in the toolbar (AZ with an arrow icon)





Select a Sort option that includes the fields you want your records to be summarized by

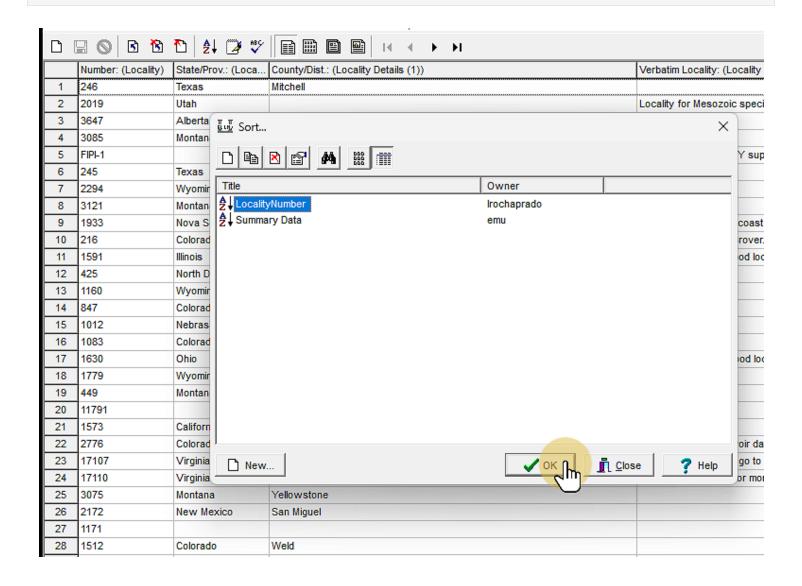
We are selecting the "LocalityNumber" Sort option, that sorts records by the Locality Number in ascending order.



3



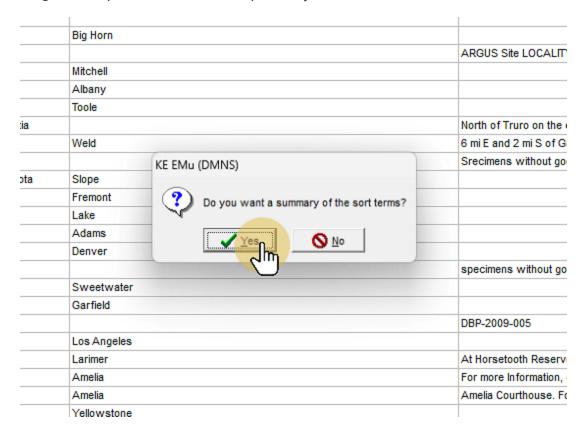
4 Click "OK"





5 Before your records are sorted, a dialog will appear

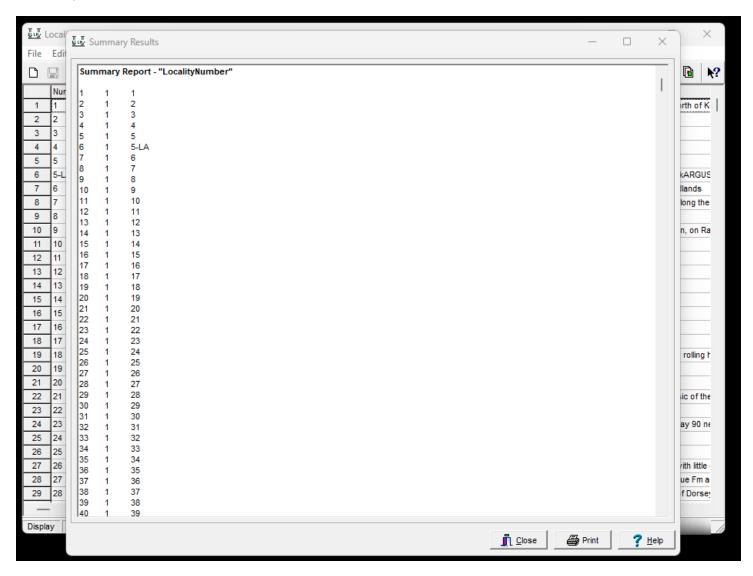
Click "Yes" to display the summary of the sort terms. Depending on the number of records and fields your are sorting by, EMu might take up to a few minutes to provide you with results.





6 A window should display the Summary Report

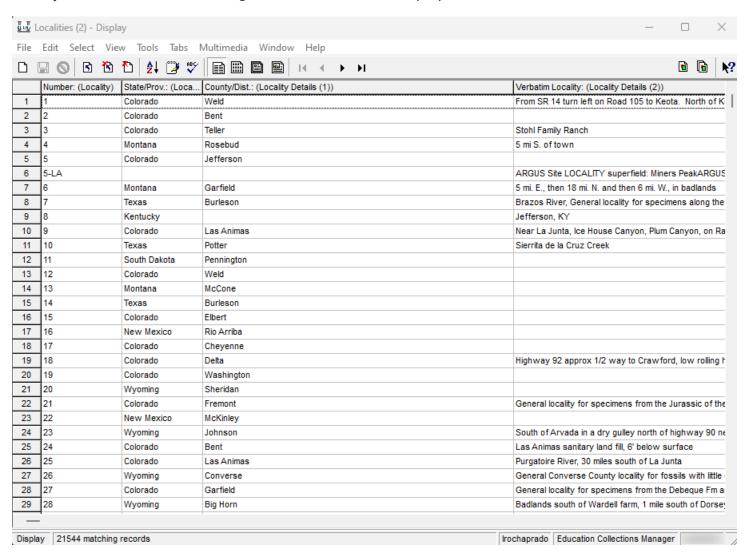
The report that appears will use the field(s) selected for the sorting process to group records by identical entries and display a count.





Your records should be displayed in a sorted list

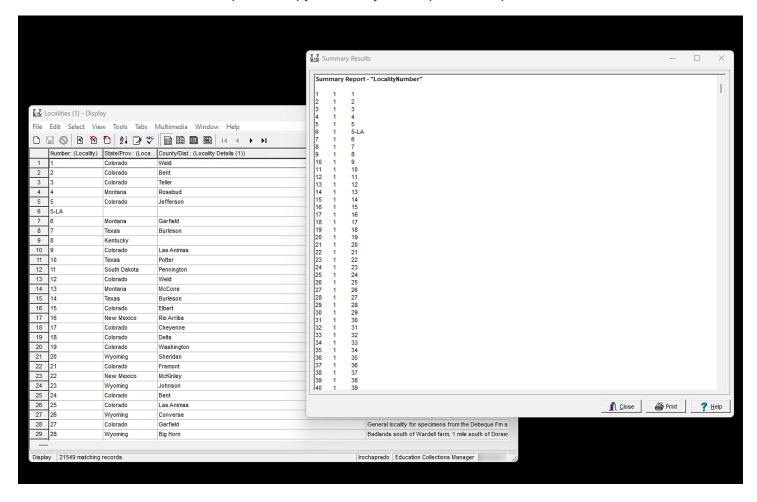
By default, the sorting process is done alphabetically or numerically (lower to higher), depending on the field(s) used. If you want to invert the sorting order, do it so in the Sort properties.





8 You can drag the Summary Report window out of the way

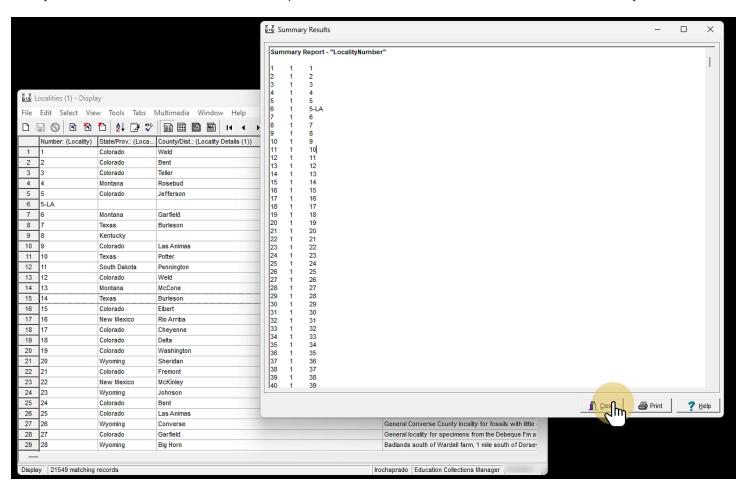
You can select the values in the report to copy them, or you can print the report with the "Print" button.





9 A summary is more useful when there are multiple fields used for sorting

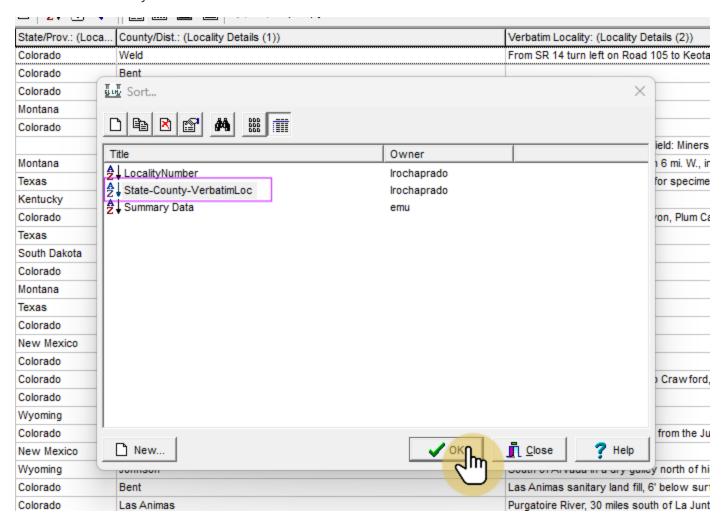
As you saw in the previous example, there was only one field being used for sorting the records, so grouping by Locality Number did not result in a useful report. Click the "Close" button to remove the summary.





10 Click the "sort" icon again to pick a new Sort option

We are selecting a new Sort option created with the fields: State, County and Verbatim Locality. Since these fields are not unique for each record (like Locality Number was), we can use them to group and count records. Select the "State-County-VerbatimLoc" and click "OK".





11 Click "Yes" in the summary option dialog

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	Albany		
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	Fremont	? Do you want a summary of the sort terms?	
	Lake	4	
	Adams	✓ Yesn	
	Denver	Yes No	
			specimens without go
	Sweetwater		
	Garfield		
			DBP-2009-005
	Los Angeles		
	Larimer		At Horsetooth Reserv
	Amelia		For more Information,
	Amelia		Amelia Courthouse. Fo
	Yellowstone		



12 You can click the "groups" to see them

If you hover over the terms that were used to create each group, your cursor will change into a hand. This means you can click it. Once you click that term, the Localities module will highlight the first record that is included in that group.

