

Summary Report

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Section overview

This section is designed to help users create a report that would contain summary information regarding all existing services from the perspective of both origination and termination sides. Not only can it provide a general overview of total services cost and billed volumes of service units, but it can be customized to outline even more detailed information regarding different client types, ASR / ACD Current, etc.

Screenshot: Summary Report query form

Summary Report

Client Type

Client

Account

Client Tags

Account Tags

Period: Last Year

2017-01-01

00:00:00

2017-12-31

23:59:59

UTC

Group By: Origin x Service Name x

Save Query

Load Query...

Query

OUTPUT

COLUMNS (2)

Order By: Total Volume ▾ x

Limit: No limit




Type: Web ▾ Grouped ▾

Currency: USD ▾

Code Deck: ▾

Creating a New Summary Report


To create a new summary report, you need to fill in the following parameters in the form and click the **Query** button:

Information block	Field Description
Filters	On the Filters menu, select the required parameters for the report. To cancel any filter, click on the delete  icon next to the filter. You can start a quick search by typing filters' names in the field at the top of a drop-down menu with filters.
	Period (1) Specify the time interval for the report and a timezone. Please note that the Period field is mandatory.
	Period 2 Accessible when you enable the Compare Period option by clicking on the plus  icon next to the Period . Specify the second interval for the report.
	Group by Select from the list of the following accessible options to group the data in reports: <ul style="list-style-type: none">• Time: Year, Month, Day, Hour• Clients: Client Type, Client, Account, C Series, Owner, Package Name• Events: Code, Code Name, Currency, Rate, Additive Rate, Origin, Result Code, Gateway, Time Profile• Totals: Setup Fee• Extras: Gateway Tag, Service Name.
	<div><div> Attention</div><div><ul style="list-style-type: none">• The Group by field is mandatory, it couldn't be empty in order to generate the report. By default, there must be at least two options: Origin and Service Name.• If you group by Client, and his/her Timezone differs from the system Timezone, the latter will be used in the respective report.</div></div>
Additional Filters	
The accessible additional filters are: <ul style="list-style-type: none">• Clients: Client Tags, Client Type, Client, Account, Account Tags, Cards Serial, Package.• Events: Code, Code Name, Cost Total, Origin, Result Code, Gateway.• Extras: Owner, Total Volume, Total records, Not Zero Records, ASR Current, ACD Current, Service Name.	
Client Type	Select a client's type for the report: Client, Reseller, Calling Card or Call Shop

Client	Define a client for the report
Account	Enter an account for the report
Client /Account Tags	Define a client's or account's tag
Cards Serial	Indicate cards serial for the report
Package	Enter a package for the report
Code	Specify a code of the needed destination
Code Name	Specify a code name of the desired destination
Cost Total	Enter the range of total call cost
Origin	Indicate an origin - origination or termination of the event
Result Code	Define a result code as a filtering parameter
Gateway	Specify a gateway
Time Profile	Specify the time profile of the event
Owner	Indicate the owner
Total Volume	Enter the range of total duration
Total Records	Enter the range of total records
Not Zero Records	Define the range of records that have a duration equal to or more than 1 unit
ASR Current	Specify the range of ASR Cur for records you would like to display
ACD Current	Specify the range of ACD Cur for records you would like to display
Service Name	Determine the name of service for the report

Output

This form contains settings of the report output data.

Click the plus  icon next to **Columns** and select the required columns to add them to the Output information block. Also, you can cancel any chosen item.

Accessible columns in the report

The list of additional columns include:

Columns for the main period:

Cost Total, Average Rate, Package Credit, Total Volume, Billed Volume, Package Volume, Total Records, Not Zero Records, Success Records, Busy Records, No Channel Records, Error Records, ASR Std, ASR Cur, ACD Srd, ACD Cur, PDD Avg, SCD Avg, xDRs List.

Columns for the comparative period are the same as for the main period. Moreover, all parameters could be selected expressed in percentage.

Rate	Avg. Rate - an average cost calculated
Totals	<ul style="list-style-type: none"> • Cost Total - the full price of all services including additional services • Total Volume - a whole volume of the events in units (specified in the Services settings "Reports" field) • Billed Volume - a whole billed volume of events. It could differ from the total volume due to the rates settings, for example, grace volume, min volume, and interval. • Package Volume - a volume within a respective package that is billed according to the package limits • Package Credit - a volume of credit that has been charged within the respective package • Total Events - the entire quantity of events • Not Zero Records - the quantity of records that have the volume equal to or more than 1 • Success Records - the quantity of records that have a duration equal to or more than 1 and a successful end code, records with Q.931 disconnect cause 16 or 31 • Busy Records - busy records quantity with Q.931 disconnect cause 17 • No Channel Records - no circuit/channel available, records quantity with Q.931 disconnect cause 34
Statistics	<p>ASR - average success rate (successful records percentage)</p> <ul style="list-style-type: none"> • Std - the value calculated based on the records with "success" status divided by the total number of records minus all records with "no channel available" status • Cur - the value calculated based on the records with volume > 0 divided by the total number of records <p>ACD - average call duration in minutes</p> <ul style="list-style-type: none"> • Std - the sum of all records duration divided by the number of records with "success" status • Cur - the sum of all records duration divided by the number of records with duration > 0 <p>PDD Avg - average post-dial delay in seconds</p> <p>SCD Avg - average session connect delay in seconds</p>
Extras	xDRs List - list of detailed records statistics

Other output settings

Order by Select parameters to sort already grouped data in columns. Here you can sort data from highest to lowest values (or vice versa) and select different values.

Type	<p>Choose a format of the report from a drop-down list: Web/CSV/Excel XLS/Excel XLSx</p> <p>Also, select a look of a table view next to the Type field:</p> <ul style="list-style-type: none"> • Plain - a simple table view • Grouped - a table view with grouped data and possibility to collapse it <div style="background-color: #ffffcc; padding: 10px; margin-top: 10px;"> <p>⚠ Attention</p> <p>Please note that the Grouped type of a table view is available only for Excel XLSx and Web formats, it doesn't work with CSV and Excel XLS.</p> </div>
Limit	Determine the number of rows that will be visible in the report. It is useful for displaying some top positions by the chosen parameter. It is available only for the Plain report type.
Send to	<p>You can send generated reports via email. Also, it is possible to specify several emails.</p> <div style="background-color: #ffffcc; padding: 10px; margin-top: 10px;"> <p>⚠ Attention</p> <p>This feature is available only for CSV/Excel XLS/Excel XLSx formats of the report; it doesn't work with Web.</p> </div>
Currency	Specify a currency of the report. All values will be automatically converted to the specified currency in the report.
Code Deck	Select a code deck from a drop-down list. All codes in the following report will be presented according to the specified code deck.

The example of a generated summary report is presented on a screenshot below:

Screenshot: Summary Report section

The screenshot shows the 'Summary Report' interface. On the left, there's a sidebar with 'Clients' and 'Client Type' filters. The main area has 'FILTERS' with 'Period' set to 'Last Year' (2017-01-01 to 2017-12-31) and 'Group By' set to 'Origin x Service Name'. The 'OUTPUT' section shows 'Order By' as 'Total Volume', 'Limit' as 'No limit', 'Type' as 'Web', 'Currency' as 'USD', and 'Code Deck' as an empty dropdown. Below these is a table with 20 columns: Origin, Service Name, Unit, Cost Total, Billed Volume, Average Rate, Package Volume, Total Volume, Package Credit, Total Events, Not Zero, Success, Busy, No Channel, Error, Setup Fee Cost, ASR Std, ASR Cur, ACD Std, ACD Cur, PDD Avg, SCD Avg, and xDRs List. The table contains data for 'termination' and 'origination' events across different services (Calls, SMS, Data) and units (min, event, gB). At the bottom, there's a status bar showing 'About 0.1588s' and a copyright notice '© 2004-2018 JeraSoft. All Rights Reserved.'

If the data in the report is grouped, it will be shown initially collapsed. To expand or collapse data in your report, click the plus or minus icons. To expand all data in the report, please click Ctrl + the icon.

⚠ Warning

Please note, the system shows rounded values in the reports. But while calculating, the system takes an exact value. Hence, the procedure of the rounding is as follows:

- the system rounds currency values according to the settings of a respective currency
- all types of events (e.g., not zero, success, busy, as well as total quantity) are not rounded
- such parameters as **Setup Fee Cost**, **Package Credit**, **Average Rate**, **Cost Total** are rounded to the nearest ten-thousandth. For example, 3.879256 to 3.8793
- others are rounded to the nearest hundredth. For example, 4.8763 to 4.88

Simple scheme: how to generate a summary report

To create a simple summary report, you need to:

- Select desired parameters for the report on the **Filters** menu
- Enter the interval and specify a timezone

- Select parameters in the **Group by** field, for example, **Currency**, **Origin**, etc.
- Select **Columns** in the Output form, for example, **Average Rate**, **ASR Std**, **ASR Cur**, **ACD Std**, **ACD Cur**, **Total Records**, etc.
- Specify the **Type** field or leave its default settings (Web/Grouped)
- Specify the currency and select a code deck (if applicable).
- Click the **Query** button.

Tip

- If you want to sort already grouped data in columns, select respective parameters in the **Order by** field. Also, you can sort from highest to lowest values (or vice versa).
- Please note, the **Order by** option is active when the **Type** of the Output form is **Plain**. When it is **Grouped**, the data is only sorted by values specified in the **Group by** field.

Creating a Query Template

Also, you can create a template for reports and save specified parameters by clicking on the **Save Query** button. A pop-up window with settings will appear, and you will need to fill in the following form.

Screenshot: New Template form

To load already existed templates while generating statistic reports, click the **Load Query** button in the **Summary Report** section.

Tip

To find more details about templates, please refer to the [Report Templates](#) article in our **User Guide**.




Summary Report buttons: reports, export, chart.

You can export data to a **CSV** or **XLSx** file, which contains only currently displayed data, with no automatic request to update data while exporting. Also, it is possible to create charts for illustrating crucial information easily. You can generate a report using the same criteria in the **Orig-Term report** and the **xDRs list** sections.


1. To download a report in **.csv**, click on the **Export to CSV**  button above the report.



Attention

Please note, this button will be visible only when the **Type** of the output is **Plain**. For the **Grouped** output type it is not available.

2. To download a **.xlsx** report file, click the **Export to XLSx**  button above the report.
3. To create a **visual chart**, click the **Show Chart**  button above the report. There is more information available on this topic in the article **How to create a statistic chart?** in our Knowledge Base.
4. You can generate a detailed report using the same criteria in the **xDRs list** section by clicking the **xDRs list**  icon above the report.

Tip

When you make a report based on two periods, **two xDRs list**  icons appear:


- the first xDRs list  icon allows generating an xDR's report based **on the first period**;
- the second xDRs list  icon allows generating data based **on the second period** in the xDRs list.

When you make a report and filter data by **Client/Client Tags/Account/Code/Code Name/Owner** parameters, two Orig-Term icons **blocked URL** appear.

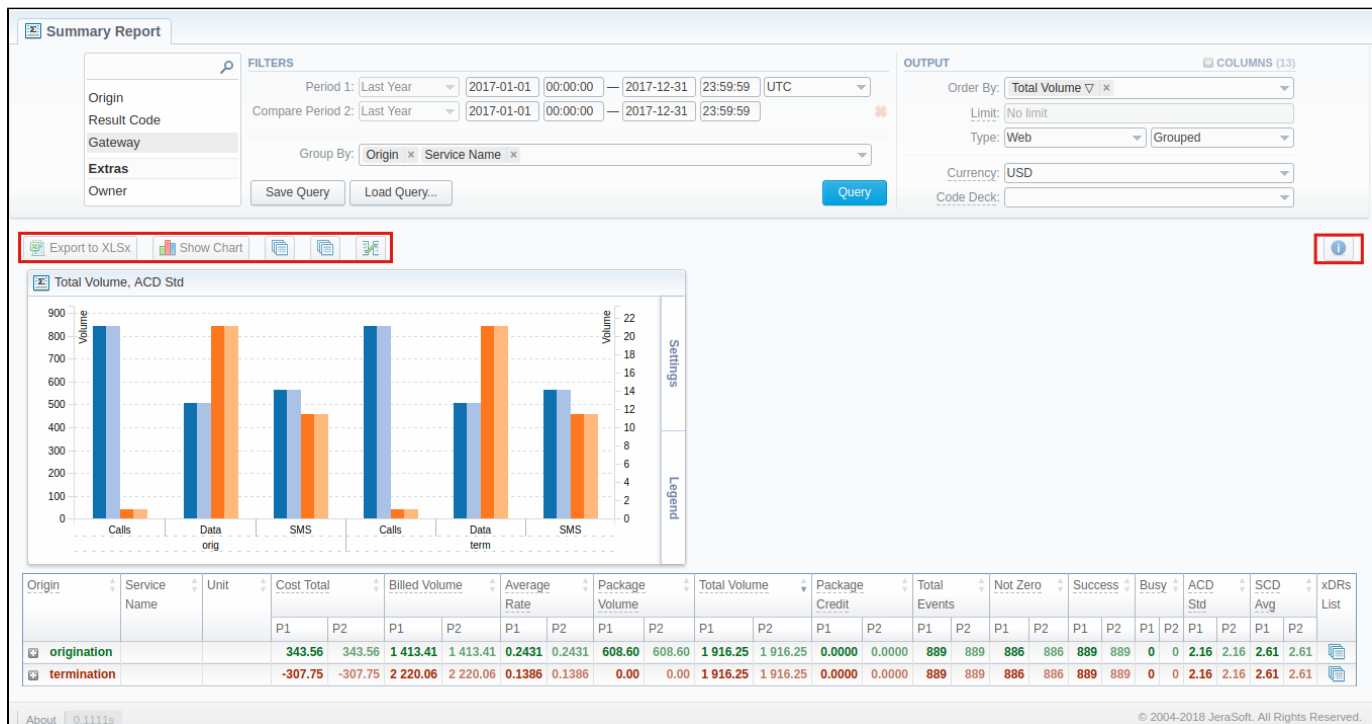
They allow generating reports with **origination** and **termination** data separately.

- this Orig-Term icon **blocked URL** allows generating a report **based on origination data**;
- this Orig-Term icon **blocked URL** allows generating a report **based on termination data**.

5. It is possible to generate a report using the same criteria in the **Orig-Term** section by clicking the **Orig-Term**  icon on the toolbar.

6. You can check an actual date interval by clicking on the **Info**  icon. The displayed data could be different from the Interval specified above if there is no data for the period.

Screenshot: Summary Report section



Side-by-side report

This tool allows building a report with side-by-side sub-reports. Use it to run a comparative analysis on the same page. It's helpful for reviewing multiple parameters, totals, and compare results at different time intervals. The **Compare Period** option is designed to create a report that shows two sub-reports side-by-side.

To enable this option, click on the plus  icon next to the **Period** field and specify both intervals (**Period 1/Period 2**) for the report.

Screenshot: Summary Report section

Summary Report

Filters

Period: Last Year 2017-01-01 00:00:00 — 2017-12-31 23:59:59 UTC

Group By: Origin x Service Name x

Save Query Load Query... Query

Output

Order By: Total Volume x

Limit: No limit

Type: Web Plain

Currency: USD

Code Deck:

Then, choose columns for a main and comparative period in the report Output form. When all required parameters are specified, click the **Query** button.

To remove this filter, please click the delete icon.

You can modify a comparative mode by changing periods and columns. For example, to compare how different the cost total of the two periods is in percentage terms. To do this, choose the **Cost Total (%)** value from the Columns. Therefore, the final report splits **Cost Total (%)** into separate columns (see screenshot below).

Screenshot: Summary Report section

Summary Report

Origin

Result Code

Gateway

Extras

Owner

Columns for main period:

Columns for comparative period:

Cost Total

Not Zero

Average Rate

Cost Total

Total Volume

Billed Volume

Package Volume

Package Credit

Total Events

Not Zero

Success

Busy

ACD Std

SCD Avg

xDRs List

OUTPUT

COLUMNS (13)

Save Query

Load Query...

Query

Code Deck:

Export to XLSx

Show Chart

Origin	Service Name	Unit	Cost Total		Billed Volume		Average Rate		Package Volume		Total Volume		Package Credit		Total Events		Not Zero		Success		Busy		ACD Std	SCD Avg		xDRs List	
			P1	P2	P1	P2	P1	P2	P1	P2	P1	P2	P1	P2	P1	P2	P1	P2	P1	P2	P1	P2		P1	P2		
origination			343.56	343.56	1 413.41	1 413.41	0.2431	0.2431	608.60	608.60	1 916.25	1 916.25	0.0000	0.0000	889	889	886	886	889	889	0	0	2.16	2.16	2.61	2.61	
termination			-307.75	-307.75	2 220.06	2 220.06	0.1386	0.1386	0.00	0.00	1 916.25	1 916.25	0.0000	0.0000	889	889	886	886	889	889	0	0	2.16	2.16	2.61	2.61	

About

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! Attention

- When you use the **Compare Period** option in the **Summary Report** and **Orig-Term Report** sections, default chart templates will not be accessible.
- When you select one of the **Time** parameters (**Year, Month, Week**) for the **Group by** field, the **End date** of the **Period 2** will be set automatically to make intervals of **Period 1** and **Period 2** equal. Moreover, the **End Date** field of **Period 2** becomes noneditable.

Knowledge Base Articles

Error rendering macro 'contentbylabel'

parameters should not be empty