

Summary Report

In this article

- [Section overview](#)
- [Creating a New Summary Report](#)
- [Simple scheme: how to generate a summary report](#)
- [Creating a Query Template](#)
- [Summary Report buttons: reports, export, chart.](#)
- [Side-by-side report](#)
- [Sharing a Report](#)
- [Knowledge Base Articles](#)

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

Service Name

Save Query

Load Query...

Query

OUTPUT

COLUMNS (2)

Order By: Total Volume

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: <i>Origin</i> and <i>Service Name</i>.• 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. You can also 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 number of records that have the volume equal to or more than 1 Success Records - the number 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	ASR - average success rate (successful records percentage) <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 ACD - average call duration in minutes <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 PDD Avg - average post-dial delay in seconds SCD Avg - average session connect delay in seconds
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.
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Type	<p>Choose a format of the report from a drop-down list: Web/CSV/Excel XLS/Excel XLSx</p> <p>You can 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; border: 1px solid #ccc;"> <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. It is also possible to specify several emails.</p> <div style="background-color: #ffffcc; padding: 10px; border: 1px solid #ccc;"> <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 Tags'. The main area has 'FILTERS' and 'OUTPUT' sections. The 'FILTERS' section includes 'Period' (Last Year), 'Group By' (Origin, Service Name), and 'Save Query'/'Load Query...' buttons. The 'OUTPUT' section includes 'Order By' (Total Volume), 'Limit' (No limit), 'Type' (Web, Grouped), 'Currency' (USD), and 'Code Deck'. 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 units (min, event, gB).

If the data is grouped in the report, 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 that 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. You can also sort from the highest to lowest values (or vice versa).
- Please note that 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

You can also 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

The screenshot displays the 'Reports Templates' form. It is divided into several sections:

- SUMMARY REPORT**: Includes fields for Title, Reseller (set to 'all resellers'), and Visibility (set to 'Private').
- WATCH (NOT AVAILABLE FOR WEB OUTPUT TYPE)**: Includes Recipients, Run Time (06:00), Run Time Timezone (UTC), and Days of Week (Mo, Tu, We, Th, Fr, Sa, Su).
- REPORT QUERY**: Contains a left sidebar with a tree view (Clients, Client Type, Client, Account, Client Tags) and a main area with:
 - FILTERS**: Period (Last Year), Date range (2017-01-01 to 2017-12-31), Time range (00:00:00 to 23:59:59), and Timezone (UTC).
 - Group By**: A dropdown menu with 'Origin' and 'Service Name' selected.
- OUTPUT**: Includes:
 - Order By**: Total Volume.
 - Limit**: No limit.
 - Type**: Web (selected) and Grouped.
 - Currency**: USD.
 - Code Deck**: A dropdown menu.

At the bottom right, there are 'OK', 'Cancel', and 'Apply' buttons.

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. It is also 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 that 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 xDRs 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.

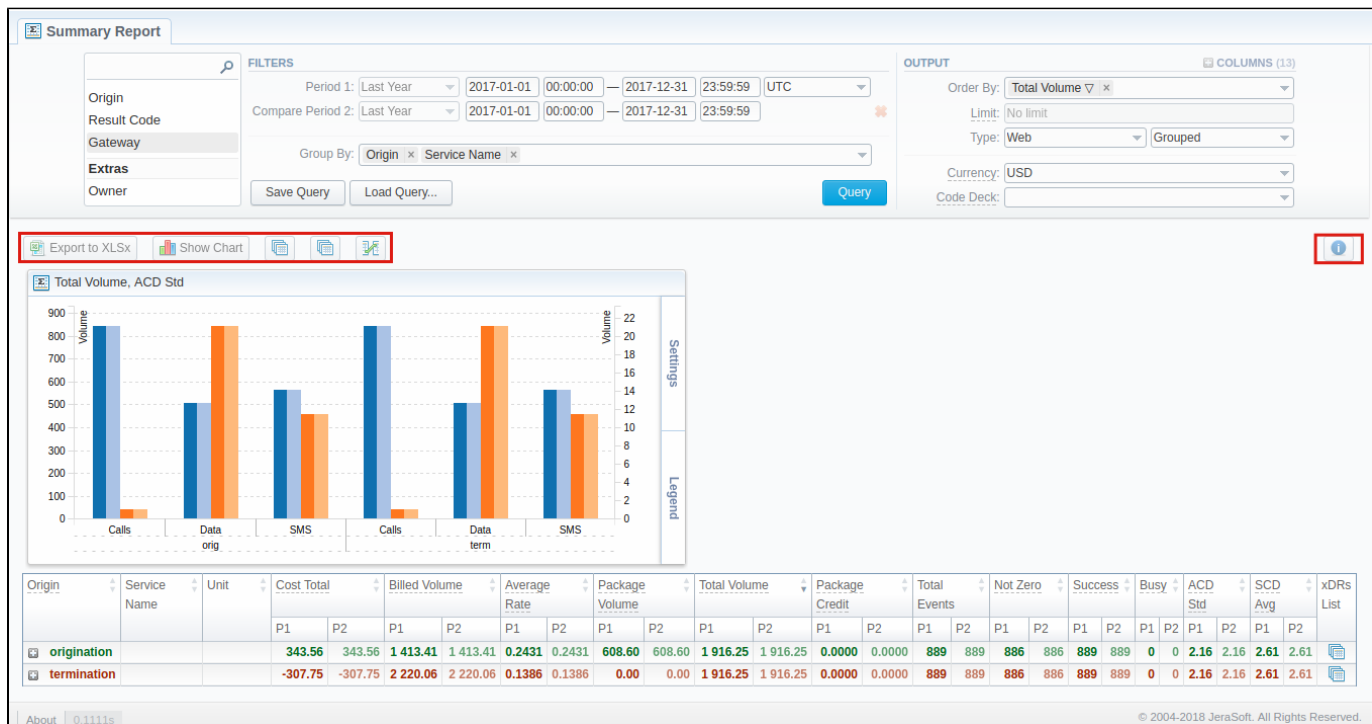
They allow generating reports with **origination** and **termination** data separately.

- 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 the 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

FILTERS

Origin Result Code Gateway Extras Owner

OUTPUT

COLUMNS (13)

Columns for main period: Cost Total x Billed Volume x Average Rate x Package Volume x Total Volume x Package Credit x Total Events x Not Zero x Success x Busy x ACD Std x SCD Avg x xDRs List x

Columns for comparative period: Average Rate x Cost Total x Total Volume x Billed Volume x Package Volume x Package Credit x Total Events x Not Zero x Success x Busy x ACD Std x SCD Avg x

Save Query Load Query... Query Code Deck:

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	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 0.1111s

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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 non-editable.

Sharing a Report

Each time you get a report output, the system generates a unique link in the format of "/view?id=<uniq-string>". It allows sharing data between the users, even if they belong to different resellers (the feature works similarly to Share by Link in Google Drive).

The link refers to the report data valid for a specific moment.

Example: When you send a link to a report, you ensure the recipient would see the same data as you do. If you change data in the system (for example, perform rerating), the previously copied link to the report will display data valid for the moment of generation (even though the actual data is now different).

You can also view the additional information about the generated report by hovering over the **Info** ⓘ icon, which is located under the **Output** section:

Title	Description
Data Period	States the period set for a report
Generated by	Indicates the Role of the user who generated a report and specifies a generation time

Screenshot: Summary Report Info icon

Summary Report

Clients

Client Type

Client

Account

Client Tags

Period: Today

2020-06-25 00:00:00

2020-06-25 23:59:59 UTC

Group by: Origin x Service Name x

Save Query

Load Query...

Query

OUTPUT

Order by: Total Volume

Limit: No Limit

Type: Web

Currency: USD

Dist Code Deck:

Export to XLSX

Show Chart

Origin	Service Name	Unit	Cost Total	Average Rate	Total Volume	Billed Volume	Package Volume	Total Events	Not Zero	Success	Busy	No Channel	Data Period: 06/25/2020 00:00:00 +0000 — 06/25/2020 06:59:59 +0000 Generated by: Demo User on 06/25/2020 09:25:14 +0000	xDRs List
origination			17.07					448	447	448	0	0	0 100.00 99.78 0.00 0.00 5.03 5.21	
termination			0.00					367	366	367	0	0	0 100.00 99.73 0.00 0.00 5.04 5.13	

About 0.1221s

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Knowledge Base Articles

Error rendering macro 'contentbylabel'

parameters should not be empty