

# 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

Clients

Client

Client Tags

Client Type

Account

Interval: Today

2021-10-08 00:00:00

—

2021-10-08 23:59:59

UTC

Group by: Origin x Service x

Save Query

Load Query...

Query

OUTPUT

COLUMNS (22)

Order by: Total Volume ▾ x

Limit: No Limit

Type: Web ▾ Grouped ▾




Currency: USD ▾




Dst Code Deck: ▾

Src 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 <b>Filters</b> 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 <b>quick search</b> by typing filters' names in the field at the top of a drop-down menu with filters.
	<b>Interval</b> Specify the time interval for the report and a timezone. Please note that the <b>Interval</b> field is mandatory.
	<b>Compare to</b> Accessible when you click on the plus  icon next to the <b>Interval</b> . Specify the second interval for the report: <ul style="list-style-type: none"><li>• <b>Previous Interval</b></li><li>• <b>Previous Day</b></li><li>• <b>Previous Week</b></li><li>• <b>Previous Month</b></li><li>• <b>Previous Year</b></li></ul>
	<b>Group by</b> Select from the list of the following accessible options to group the data in reports: <ul style="list-style-type: none"><li>• <b>Time:</b> Year, Month, Day, Hour</li><li>• <b>Clients:</b> Company, Legal Entity, Owner User, Client, Client Type, Account, Package</li><li>• <b>Events:</b> Dst Code, Dst Code Name, Dst Country, Currency, Origin, Service, Result Code, Gateway, Gateway Tag</li><li>• <b>Extras:</b> Time Profile, Setup Fee, Rate, Additive Rate.</li></ul>
	<div><div> <b>Attention</b></div><div><ul style="list-style-type: none"><li>• The <b>Group by</b> field is mandatory, it couldn't be empty in order to generate the report. By default, there must be at least two options: <b>Origin</b> and <b>Service</b></li><li>• If you group by <b>Client</b> and his/her <b>Timezone</b> differs from the <b>system Timezone</b>, the <b>latter</b> will be used in the respective report.</li><li>• When you are grouping by <b>year</b>, it is recommended to indicate the calendar year in the period. The same goes for other period types.</li></ul></div></div>
Additional Filters	

	<p>The accessible additional filters are:</p> <ul style="list-style-type: none"><li>• <b>Clients:</b> Company, Legal Entity, Owner User, Client, Client Tags, Client Type, Account, Account Tags, Package</li><li>• <b>Events:</b> Origin, Dst Code, Dst Code Name, Dst Code Country, Src Code, Src Code Name, Src Code Country, Rate (avg), Result Code, Gateway, Gateway Tag, Time Profile, Service</li><li>• <b>Statistics:</b> ASR Std, ASR Current, ACD Std, ACD Current, PDD (avg), SCD (avg)</li><li>• <b>Totals:</b> Volume Total, Volume Billed, Package Volume, Cost, Package Credit, Setup Fee Cost, Additive Cost, Taxes Total, Total Records, Non Zero Records, Success Records, Busy Records, No Channel Records, Error Records</li><li>• <b>Extras:</b> Match Client, Match Rate</li></ul>		
Output	<p>This form contains settings of the report output data.</p> <p>Click the plus  icon next to <b>Columns</b> and select the required columns to add them to the Output information block. Also, you can cancel any chosen item.</p>		
	<p><b>Accessible columns in the report</b></p>		
	<p><b>The list of additional columns include:</b></p>		
	<p><b>Columns for the main interval:</b></p> <p>Cost Total, Setup Fee Cost, Average Rate, Package Credit, Total Volume, Billed Volume, Package Volume, Total Events, Not Zero, Success, Busy, No Channel, Error, ASR Std, ASR Cur, ACD Srd, ACD Cur, PDD Avg, SCD Avg, xDRs List, Taxes Total, Additive Cost.</p>		
	<p><b>Columns for the comparative interval</b> are the same as for the main period. Moreover, all parameters could be selected expressed in percentage.</p>		
	<table><tr><td><b>Rate</b></td><td><b>Avg. Rate</b> - an average cost calculated</td></tr></table>	<b>Rate</b>	<b>Avg. Rate</b> - an average cost calculated
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<p><b>Other output settings</b></p>			
<b>Order by</b>	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.		
<b>Type</b>	<p>Choose a format of the report from a drop-down list: <b>Web/CSV/Excel XLS/Excel XLSx</b></p> <p>Also, select a look of a table view next to the <b>Type</b> field:</p> <ul style="list-style-type: none"><li>• <b>Plain with total</b> - a simple table view with an additional row with calculated totals</li><li>• <b>Plain</b> - a simple table view</li><li>• <b>Grouped</b> - a table view with grouped data and possibility to collapse it</li></ul> <div><p> <b>Attention</b></p><p>Please note that the <b>Grouped</b> type of a table view is available only for <b>Excel XLSx</b> and <b>Web</b> formats, it doesn't work with <b>CSV</b> and <b>Excel XLS</b>.</p></div>		
<b>Limit</b>	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 <b>Plain</b> report type.		
<b>Send to</b>	<p>You can send generated reports via email. Also, it is possible to specify several emails.</p> <div><p> <b>Attention</b></p><p>This feature is available only for <b>CSV/Excel XLS/Excel XLSx</b> formats of the report; it doesn't work with <b>Web</b>.</p></div>		
<b>Currency</b>	Specify a currency of the report. All values will be automatically converted to the specified currency in the report.		
<b>Code Deck</b>	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

Summary Report

Filters

Interval: Last Week2021-09-27 00:00:002021-10-03 23:59:59 UTC

Group by: OriginService

Save QueryLoad Query...Query

Output

Order by: Total Volume

Limit: No Limit

Type: WebGrouped

Currency: USD

Dst Code Deck:

Src Code Deck:

Export to XLSXShow Chart

Origin	Service	Unit	Cost	Additive Cost	Setup Fee Cost	Rate (avg)	Package Credit	Taxes Total	Total Volume	Billed Volume	Package Volume	Total Events	Not Zero	Success	Busy	No Channel	Error	ASR Std	ASR Cur	ACD Std	ACD Cur	PDD (avg)	SCD (avg)	xDRs List	
origination			0.01	0.00	0.00		0.0000	0.00					3	3	3	0	0	0	100.00	100.00					
origination	Calls	min	0.0128	0.0000	0.0000	0.0080	0.0000	0.0000	1.6000	1.6000	0.0000		3	3	3	0	0	0	100.00	100.00	0.53	0.53	6.00	5.67	
termination			-0.01	0.00	0.00		0.0000	0.00					3	3	3	0	0	0	100.00	100.00					
termination	Calls	min	-0.0072	0.0000	0.0000	0.0045	0.0000	0.0000	1.6000	1.6000	0.0000		3	3	3	0	0	0	100.00	100.00	0.53	0.53	6.00	5.67	

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 Queries](#) 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 expand/collapse all the data for the **Grouped** output, click on the icon above the report.
2. 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.

3. To download a **.xlsx** report file, click the **Export to XLSx** button above the report.
4. 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.
5. 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 intervals, **two xDRs list** icons appear:

- the first xDRs list icon allows generating an xDRs report based **on the first interval**;
- the second xDRs list icon allows generating data based **on the second interval** 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**.

6. 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.

7. 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 to** option is designed to create a report that shows two sub-reports side-by-side. You can view more info about it in the article [How to compare report parameters over the periods?](#).

To enable this option, click on the plus icon next to the **Interval** field and specify both intervals for the report.

Screenshot: Summary Report section

**Summary Report**

**FILTERS**

Interval: Last Week | 2021-09-27 00:00:00 — 2021-10-03 23:59:59 UTC

Group by: Origin x Service x

**OUTPUT**

Order by: Total Volume x

Limit: No Limit

Type: Web x Grouped x

Currency: USD

Dst Code Deck:

Src Code Deck:

**Query**

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**

**FILTERS**

**Columns for main interval:**

Cost x Additive Cost x Setup Fee Cost x Rate (avg) x Package Credit x Taxes Total x Total Volume x Billed Volume x Package Volume x Total Events x Not Zero x Success x Busy x No Channel x Error x ASR Std x ASR Cur x ACD Std x ACD Cur x PDD (avg) x SCD (avg) x xDRs List x

**Columns for comparative interval:**

Cost x Additive Cost x Setup Fee Cost x Rate (avg) x Package Credit x Taxes Total x Total Volume x Billed Volume x Package Volume x Total Events x Not Zero x Success x Busy x No Channel x Error x ASR Std x ASR Cur x ACD Std x ACD Cur x PDD (avg) x SCD (avg) x xDRs List x

**OUTPUT**

**COLUMNS (22)**

Order by: Total Volume x

Limit: No Limit

Type: Web x Grouped x

Currency: USD

Dst Code Deck:

Src Code Deck:

**Query**



## How does the Compare Period work?

### Example 1:

If you select the **Interval** to be **Today** 00:00:00 til 23:59:59, the **Previous Interval** and **Previous Day** values would be the same and show yesterday. The **Previous Week** option would display the same day last week (i.e., Monday for Monday), the **Previous Month** option would show the same date last month, and the **Previous Year** will display the same date last year.

### Example 2:

If you select the **Interval** to be **This Week**, the system will take the period starting Monday 00:00:00 and up to 23:59:59 on the **current day**. That is if your current day is Thursday, **This Week** would be Monday to Thursday. The comparative periods will work accordingly, selecting the same periods from the past week, month, year. Only the **Previous Day** option will result in offsetting a period one day behind (if a period is Monday to Thursday, comparative would be Sunday to Wednesday).

## Attention


When you use the **Compare to** option in the **Summary Report** and **Orig-Term Report** sections, default chart templates will not be accessible.

## 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).

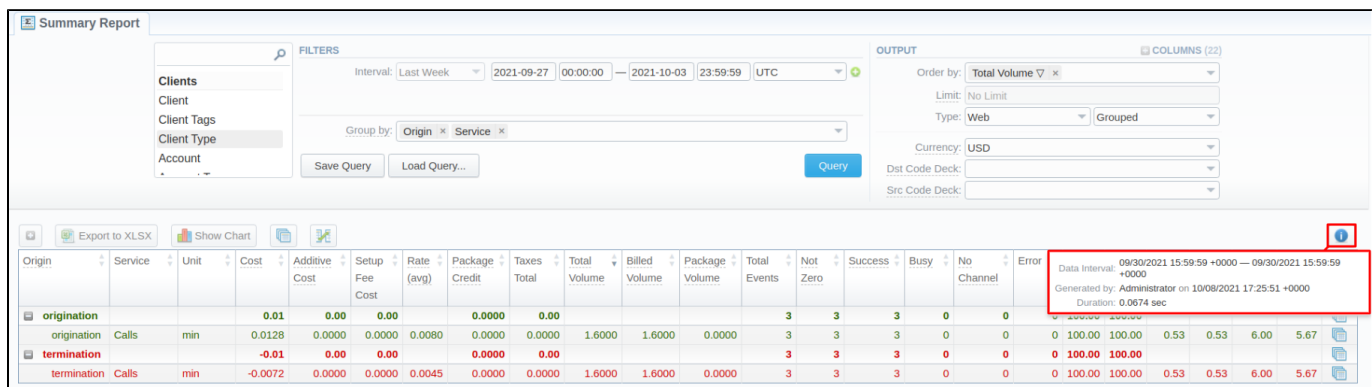
The link refers to the report data valid for a specific moment.

**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 Interval	States the period set for a report
Data Interval 2	States the period set for a Compare Mode
Generated by	Indicates the <b>Role</b> of the user who generated a report and specifies a generation time
Duration	Time spent to generate a report

Screenshot: Summary report Info icon



The screenshot shows the 'Summary Report' interface. On the left, there's a sidebar with 'Clients' and 'Account' sections. The main area has 'FILTERS' and 'OUTPUT' sections. The 'FILTERS' section includes 'Interval' (Last Week), 'Date Range' (2021-09-27 to 2021-10-03), 'Time Zone' (UTC), and 'Group by' (Origin, Service). The 'OUTPUT' section includes 'Order by' (Total Volume), 'Limit' (No Limit), 'Type' (Web), 'Currency' (USD), 'Dst Code Deck', and 'Src Code Deck'. Below these is a table with columns: Origin, Service, Unit, Cost, Additive Cost, Setup Fee Cost, Rate (avg), Package Credit, Taxes Total, Total Volume, Billed Volume, Package Volume, Total Events, Not Zero, Success, Busy, No Channel, Error. The table shows data for 'origination' and 'termination' calls. A red box highlights the 'Info' icon in the top right corner of the table area.

## Knowledge Base Articles

### Error rendering macro 'contentbylabel'

parameters should not be empty

