

Custom Summary Reports

Summary reports allow you to use data from multiple tables in an HTML report format. These reports are built with **table variables** defined by users. You need to create each variable in a summary report, which makes them a bit more time-consuming to set up than a standard chart or report.

✔ If you need to report on data from multiple tables at once, but you aren't sure what format you need, consider **Dashboards** or **Excel Reports** instead. They don't require you to create your own variables, and you can add visual, graphical representations of data without needing to code them manually in HTML. Note that you do need to create table variables if you want to use a Numeric Results dashboard widget.

Like standard reports, summary reports can be scheduled to run at predetermined intervals, and can be emailed or saved to a hard drive. Summary reports cannot include an attached chart.

Plan the Report

Custom summary reports require a lot of pieces, so it is important to have a plan before you begin. Specifically, before you start to create your report, you should know:

- What pieces of data you want to include on the report
- Which tables contain the data you need
- How and when you want to distribute the report

It is also helpful to plan the layout and design for the report before you actually create it. Note that you will need to create your design in a WYSIWYG editor, or to code your design directly in HTML.

Create Table Variables

Now that you know what pieces of data you need for your report, you need to define them as variables in the system so you can reference them in your report. It can be helpful to keep track of each variable you create by checking them off on your plan.

For detailed information about creating table variables, see [Table Variables](#).

Create a Custom Summary Report

You can create a custom summary report for an individual table or for multiple tables.

1. Create a custom summary report for:
 - An individual table: Expand the table you want to report on and click **Charts/Reports**. Click **New** to create a new report.

- **Multiple tables:** Under Home, go to **Summary/combined** reports. Open the **New** drop-down menu and choose the option for one of the tables you plan to report on.
2. On the General tab, select the **Custom Summary Report** output format.
 3. Complete the rest of the fields on the General tab.
 4. Click **Next**.
 5. Select the editor you want to use:
 - **HTML:** This editor is a WYSIWYG editor with a formatting toolbar.
 - **Source HTML:** This editor is a plain-text HTML editor that accepts more complex code, but requires knowledge of HTML.
 6. In the editor, create the template for your report. To add the table variables you created, click **Formula Help**, locate the table variable, and click the variable name hyperlink. This adds the variable name in the editor where your cursor is.
 7. When you're finished editing, complete the Scheduling tab for your report, see your finished report on the Preview tab, and click **Finish**.

Make sure to test your report and the table variables included in it. You might need to adjust the report formatting and variables before you distribute the report.

Use Cases

Because custom summary reports support HTML, there are a lot of possibilities for creative and complex formatting. Let's look at some examples.

Create a Basic Custom Summary Report

You can create a simple, functional custom summary report in the WYSIWYG editor that shows all the information you need.

Using this in the WYSIWYG editor:

Stitle	
Number of cases created in last 3 months:	\$global.casesopenedlast3months
Number of cases closed in the last 3 months:	\$global.casesclosedlast3months
Average time to close cases closed in last 3 months (hours):	\$global.timetocloseinlast3months
Average time to close cases closed in last 1 month (hours):	\$global.averagetimetoclosetlastmonth
Number of Critical Priority cases in last 3 months:	\$global.criticalcaseslast3months
Total Time reported for cases in last 3 months:	\$global.timereportedfortickets

Basic custom summary report design

We see this in the final report preview:

Summary of Support Case activity	
Number of cases created in last 3 months:	7
Number of cases closed in the last 3 months:	1
Average time to close cases closed in last 3 months (hours):	289.373
Average time to close cases closed in last 1 month (hours):	271.388
Number of Critical Priority cases in last 3 months:	2
Total Time reported for cases in last 3 months:	891.372

Final report preview

Create a Polished Custom Summary Report

If you have more time to dedicate to your report formatting, you can give your custom summary report a cleaner look that complements the look and feel of your system. This example still uses the WYSIWYG editor.

Using this in the WYSIWYG editor:

BSM

Draft: \$global.draft_bsms

Pending Approval: \$global.pending_bsms

Revision: \$global.bsm_revisions

BST

Draft: \$global.bst_draft

Pending Approval: \$global.bst_pending

Revision: \$global.bst_revision

CNT

Draft: \$global.cnt_drafts

Pending Approval: \$global.cnt_pending

Revision: \$global.cnt_revision

GEN

Draft: \$global.gen_draft

Pending Approval: \$global.gen_pending

Revision: \$global.gen_revision

We see this in the final report preview:

BSM

Draft: 60

Pending Approval: 51

Revision: 5

BST

Draft: 58

Pending Approval: 85

Revision: 2

CNT

Draft: 14

Pending Approval: 48

Revision: 0

GEN

Draft: 12

Pending Approval: 67

Revision: 1

Final report preview, showing formatted
text

Create a Complex Custom Summary Report

If you're comfortable working in HTML, you can create highly customized, complex reports.

Using this code in the Source Editor:

```
<style>
.block150 { white-space: normal; width: 120px; height: 130px }
.block750 { white-space: normal; width: 740px; height: 130px }
.block150 td, .block750 td { width: 150px }
.td-orange {background-color: #FFB138; color: white; font-family:calibri; font-
weight:bold; border-top-left-radius: .7vw; border-bottom-left-radius: .7vw; width:
10%; padding: 0px; vertical-align: super; padding: 1vw;}
.td-red1 {background-color: #F25252; color: white; font-family:calibri; font-weight:
bold; width: 10%; vertical-align: super; padding: 1vw;}
.td-red2 {background-color: #F25252; color: white; font-family:calibri; font-weight:
bold; border-top-right-radius: .7vw; border-bottom-right-radius: .7vw; width: 10%;
vertical-align: super; padding: 1vw;}
.td-blue {background: linear-gradient(to right,#84C8FA,#328ED1); color: white; font-
family:calibri; font-weight:bold; width: 65%; vertical-align: super; padding: 1vw;}
.td-green {background-color: #61BA80; color: white; font-family:calibri; font-
weight:bold;width: 10%; vertical-align: super; padding: 1vw;}
.td-gray {background-color: #A8A8A8; color: white; font-family:calibri; font-weight:
bold;width: 10%; vertical-align: super; padding: 1vw;}
.td-white {background-color: #FFFFFF; width: .5%; }
.table2 {cellpadding="8" cellspacing="12" style="border-spacing: 10px 0px; border-
width:0px; border-style:hidden; text-align: center; border-top-left-radius: 10px;
border-bottom-left-radius: 10px;}
.td-small {text-align: center; line-height: 1vw; font-size:1vw; color: #FFFFFF;
font-weight: bold;}
.td-big {text-align: center; vertical-align: text-top; font-size: 4vw; color:
#FFFFFF}
</style>
<table style="border-spacing: 0px 0px; background-color: #FFFFFF; border-width:0px;
border-style:hidden; text-align: center; width: 95vw; table-layout: fixed"
cellspacing="0" cellpadding="0" align="center">
<tbody>
<tr>
    <td class="td-orange">
        <table width="100%">
            <tbody>
                <tr>
                    <td style="vertical-align: top"><font style="font-size:
4vw; color:#FFFFFF">$global.underreview_companyname</font></td>
                </tr>
            </tbody>
        </table>
    </td>
</tr>
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bold;">Sent to Other Party Signatory</font></td>
        <td style="text-align: center; line-height: 1vw; vertical-align: super; width: 16%"><font style="font-size:1vw; color: #FFFFFF; font-weight: bold;">Partially<br>Executed</font></td>
        <td style="text-align: center; line-height: 1vw; vertical-align: super; width: 16%"><font style="font-size:1vw; color: #FFFFFF; font-weight: bold;">Sent to Signatory</font></td>
    </tr>
</tbody></table>
</td>

        <td class="td-white"></td>

        <td class="td-green">
            <table width="100%" align="center">
                <tbody><tr>
                    <td style="text-align:center"><font style="font-size: 4vw; color: #FFFFFF">$global.executed_companyname</font></td>
                </tr>
                <tr>
                    <td style="text-align: center; line-height: 1vw;"><font style="font-size:1vw; color: #FFFFFF; font-weight: bold;">Fully Executed</font></td>
                </tr>
            </tbody></table>
        </td>

        <td class="td-white"></td>
        <td class="td-gray">
            <table width="100%" align="center">
                <tbody><tr>
                    <td style="text-align: center; "><font style="font-size: 4vw; color:#FFFFFF">$global.canceled_companyname</font></td>
                </tr>
                <tr>
                    <td style="text-align: center; line-height: 1vw;"><font style="font-size:1vw; color: #FFFFFF; font-weight: bold;">Canceled</font></td>
                </tr>
            </tbody></table>
        </td>

        <td class="td-white"></td>

        <td class="td-red2">
            <table width="100%" align="center">
                <tbody><tr>
                    <td style="text-align: center;"><font style="font-size: 4vw; color:#FFFFFF">$global.expired_companyname</font></td>
                </tr>
                <tr>
                    <td style="text-align: center; line-height: 1vw;"><font style="font-size:1vw; color: #FFFFFF; font-weight: bold;">Expired</font></td>
                </tr>
            </tbody></table>
        </td>
    </tr>
</tbody></table>

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        </tbody></table>
    </td>

</tr>
</tbody>
</table>
```

We see this report preview:

4	0	1	0	0	0	0	0	2	0	0
Under Review	Sent Back to Requester	Negotiations - Other Party	Negotiations - M	Negotiations - MN	Sent to Other Party Signatory	Partially Executed	Sent to Signatory	Fully Executed	Canceled	Expired

Report preview showing color formatted cells of various key metrics

✔ You can create helpful visual presentations without HTML code using Dashboards.