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Documentation Modules Account Settings

Reports

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The **Reports** section of the Account module is used to manage custom report templates and view statistics and other information for all report templates. Furthermore, this section allows adding and managing your repositories that are used to define new report templates. Namely, added report templates enable Connect users to generate custom report files that contain required Connect data. The following describes the Reports section user interface and provides instructions on how to add your repository and manage your custom templates.

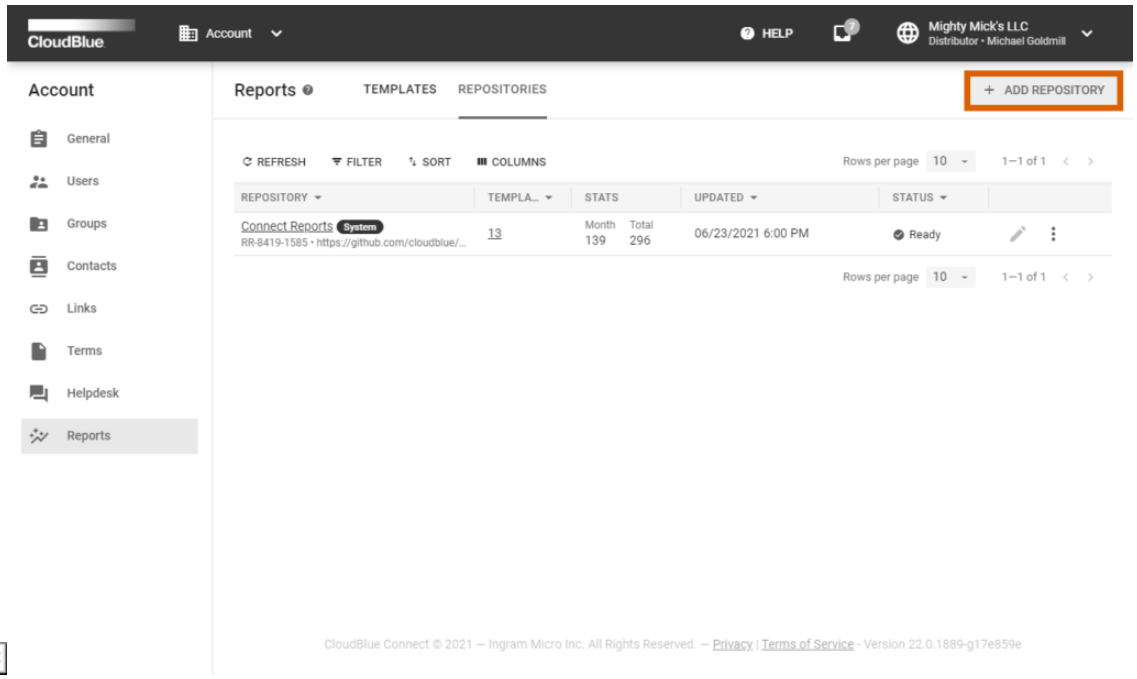
Repository

Proceed to the **Repository** tab to review and manage your existing repositories. Add your new repository with your custom report templates as described below.

> Connect Reports SDK
>
> Create custom report templates by following the instructions from the Connect Reports SDK documentation on the Connect Community page. Once your custom report templates are created successfully, upload these templates to your Git repository and add it to the Connect platform as described below.

Adding Repositories

Click the **Add** button to launch a repository wizard. Thereafter, follow the wizard steps to successfully add your repository to the Connect platform.



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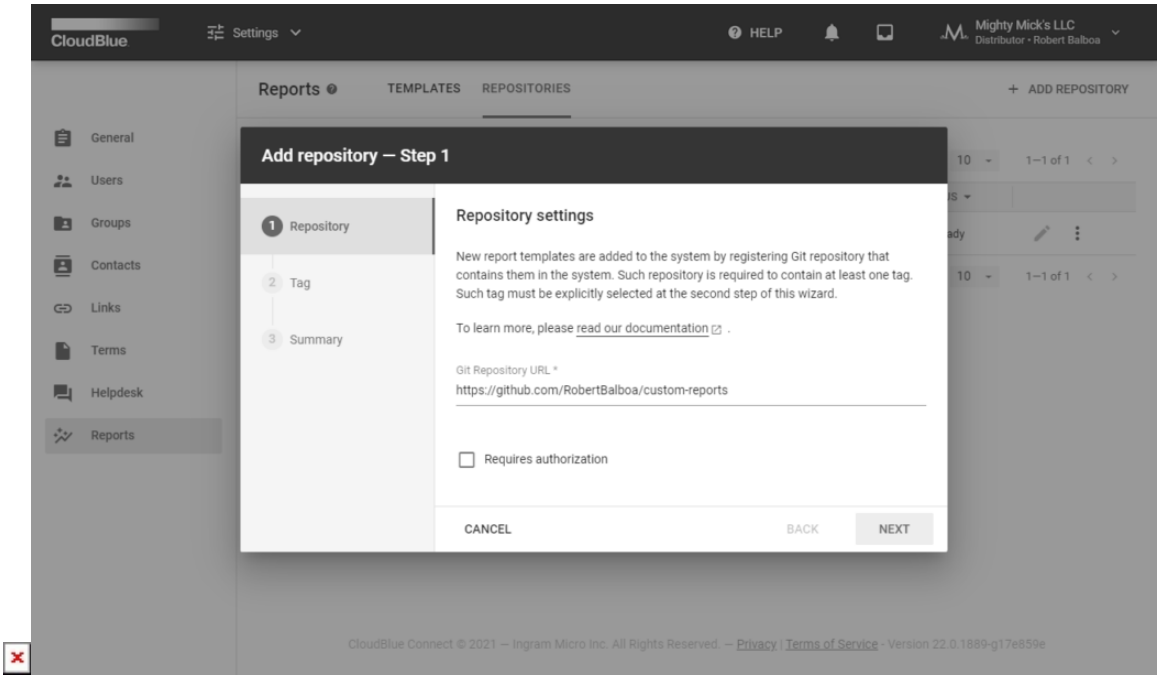

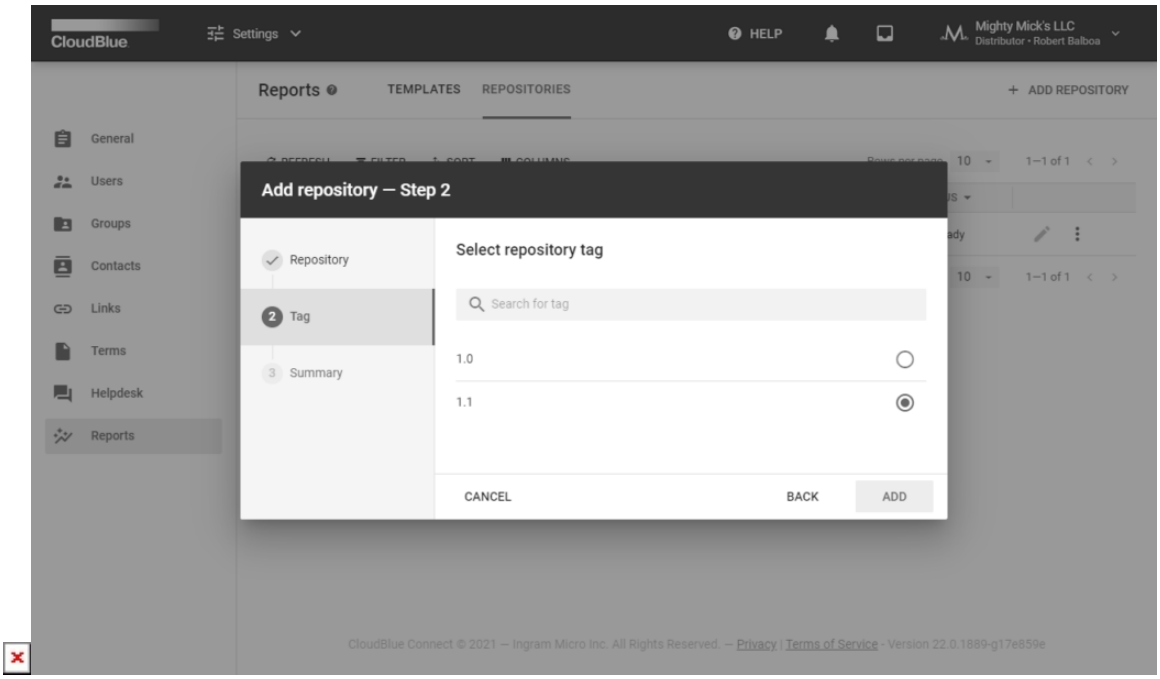

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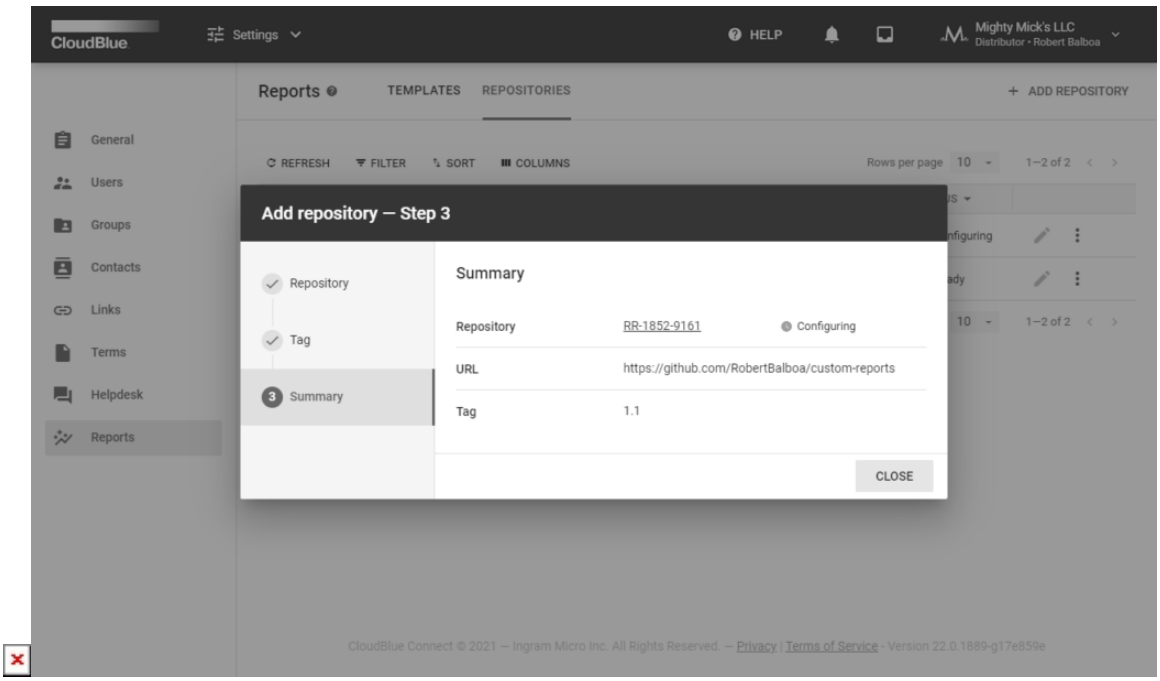

1. **Repository**: Provide your Git URL to the corresponding field. Note that your repository should contain at least one tag. In case your repository requires authorization, check the *Requires Authorization* checkbox and specify your username and password.
2. **Tag**: Select your required tag in the following form. Click the *Save* button to finalize your repository configuration on Connect.
3. **Summary**: As a result, the system provides a summary with your added repository data.

Note that the system also assigns the *Configuring* status to your new repository object. In case your repository is scanned successfully, Connect assigns the *Ready* status to this object. Otherwise, the operation is failed and the system transfers this object to the *Failed* state.

Repository Details

Click on your added repository name from the Repository tab to access the **Repository Details** screen:

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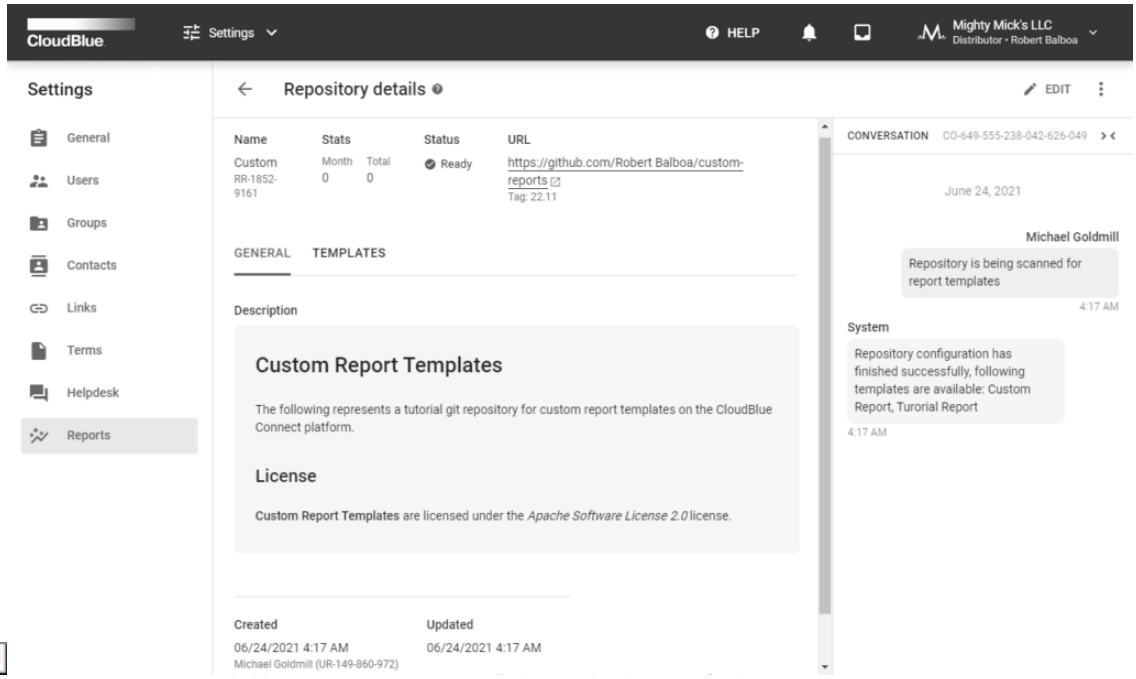

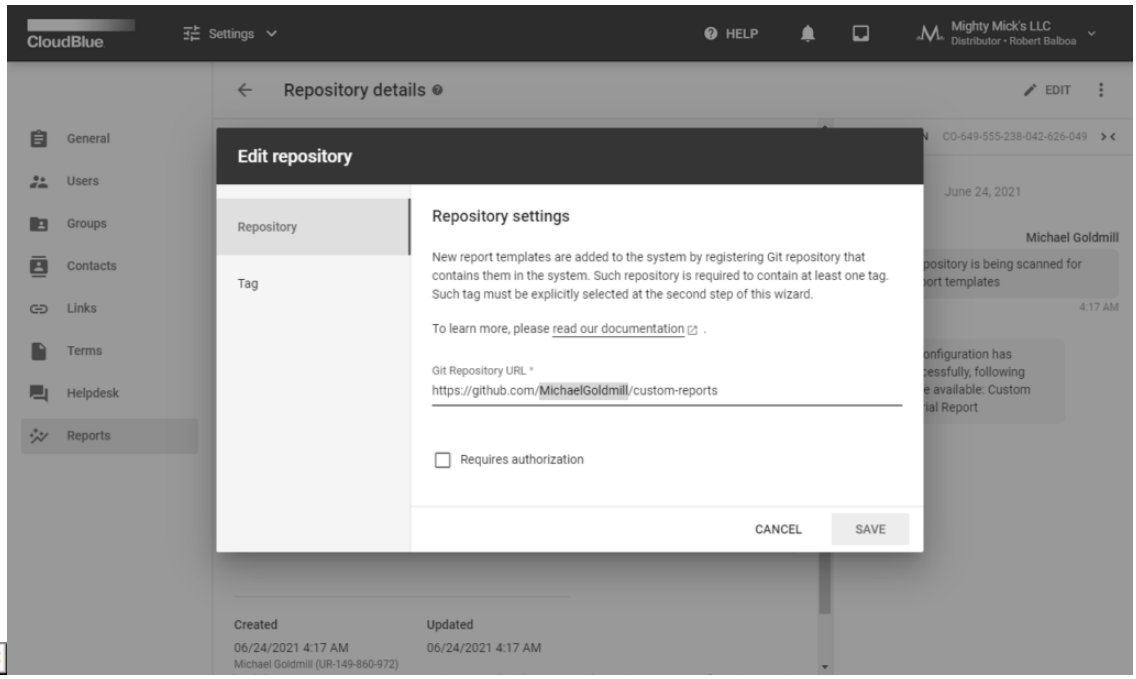

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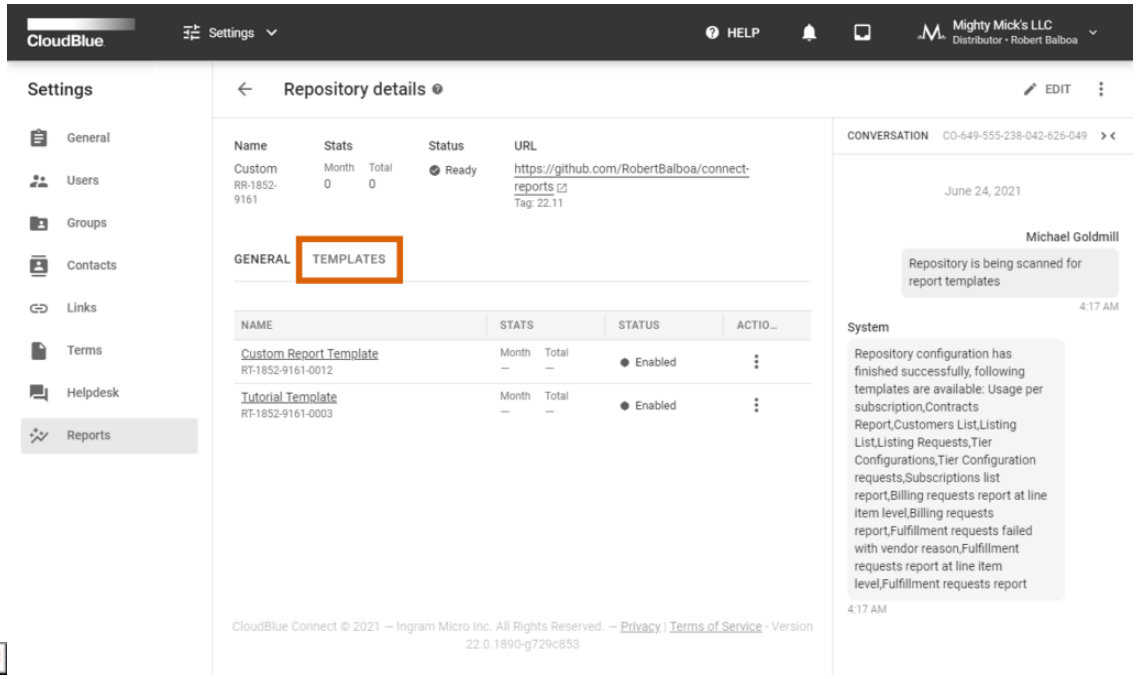

The Repository Details screen displays your repository description within the **General** tab. Note that the system provides this description from your *readme.md* file.

Click the **Edit** button at the top-right corner of the screen to change your added repository URL, authorization credentials, or tags. In case your repository object is assigned to the *Failed* state, you can delete the repository by clicking on the vertical ellipsis icon and clicking delete.

Navigate to the **Templates** tab from the Repository Details screen to access your processed custom templates. The system allows managing your custom templates and allows accessing the *Template Details* screen as described below.

Templates

The **Templates** tab from the Reports section allows reviewing all *system* templates (templates that are available on Connect by default) as well as your custom templates that can be added from your Git repositories. Templates define the structure and the content of your generated report files.

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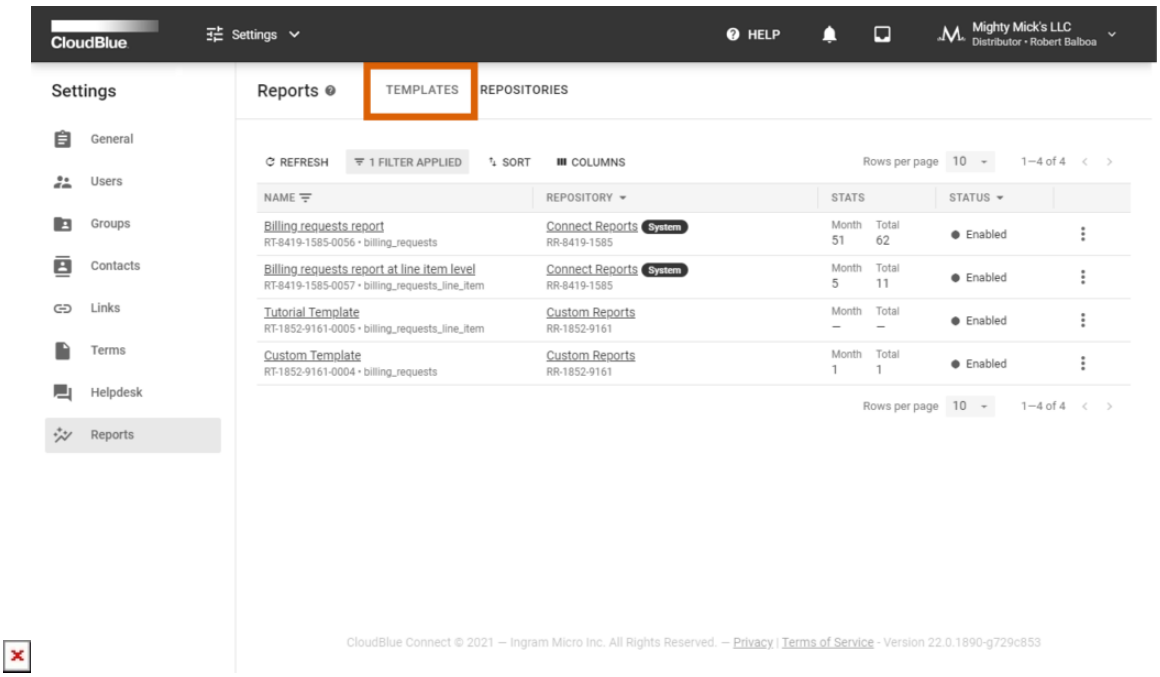
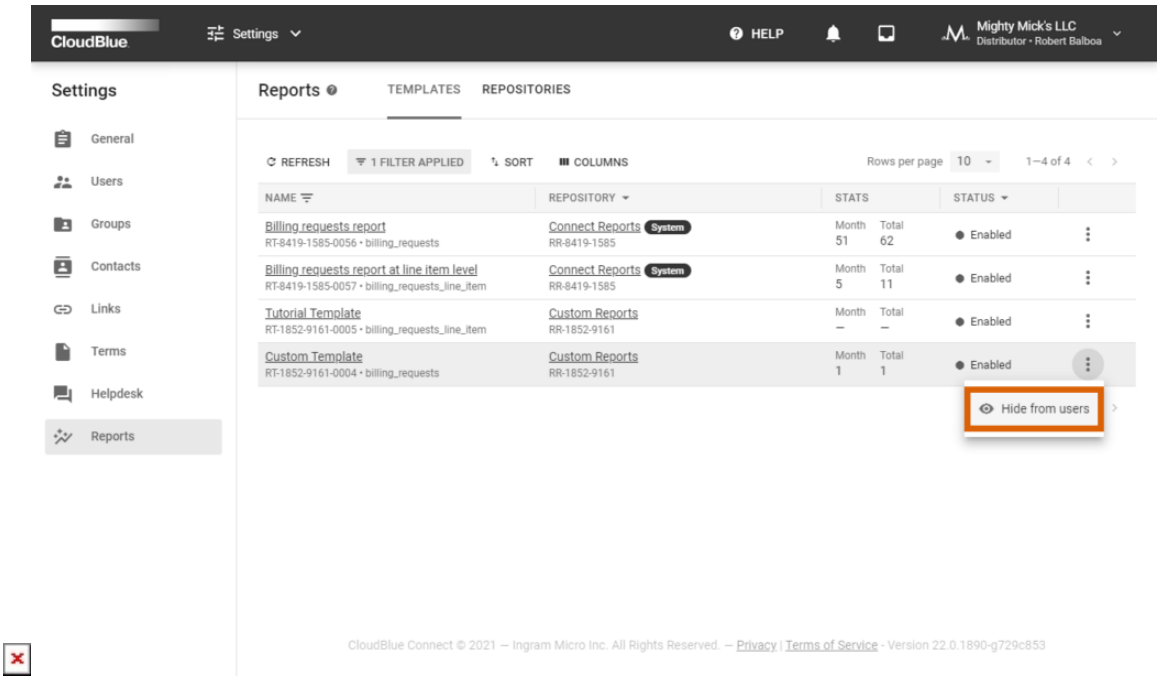


Note that the *Templates* tab also provides statistics that showcase the number of reports that generated using a template (for the last month and in total).

Template Management

Hide your added custom report files by clicking on the vertical ellipsis (⋮) icon and selecting the **Hide from users** option. In this case, the system transfers your template to the *Disabled* state and it will not be visible to your account users.



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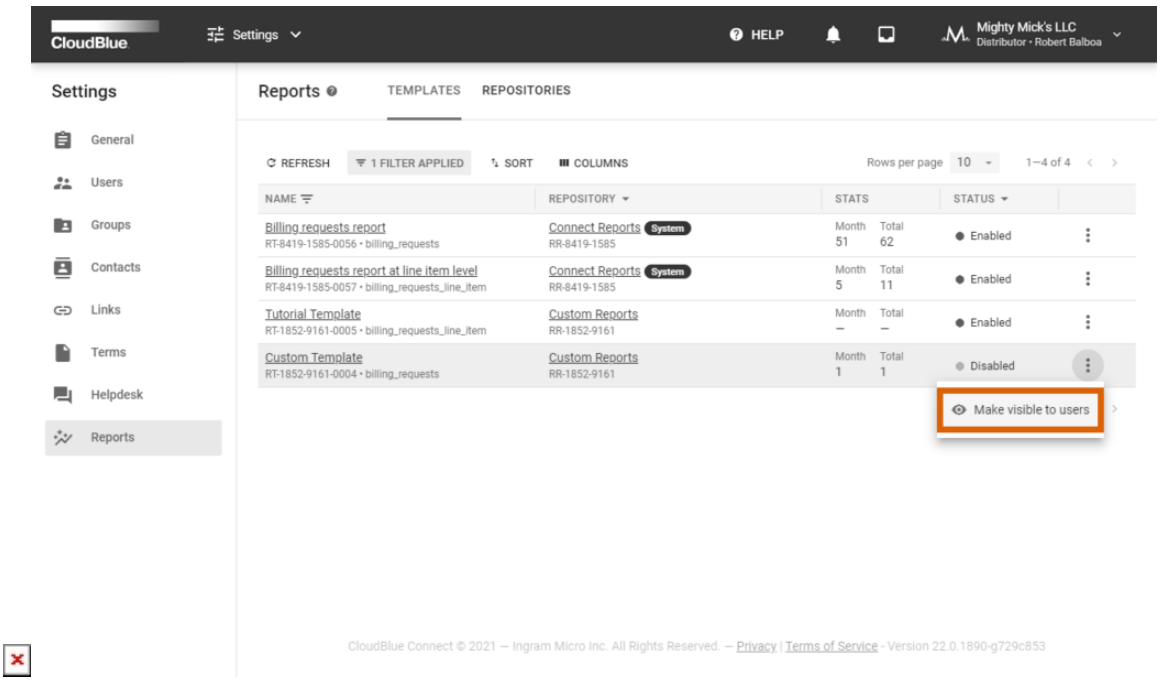

In case your updated repository doesn't include your added templates, the system assigns such templates to the *Blocked* state. Once your repository object is removed, the system automatically deletes its associated templates.

Note that it is not possible to disable or delete the default system templates.

Template Details

Click on the template name to access the **Template Details** screen. This screen provides various data within the following tabs:

- **General**: Contains the description of your selected report template.
- **Parameters**: This tab provides parameter data for your selected template. This includes *parameter name*, *type* and if a provided parameter *is required*.
- **Reports**: Use this tab to review and access reports that are generated by using the selected template.

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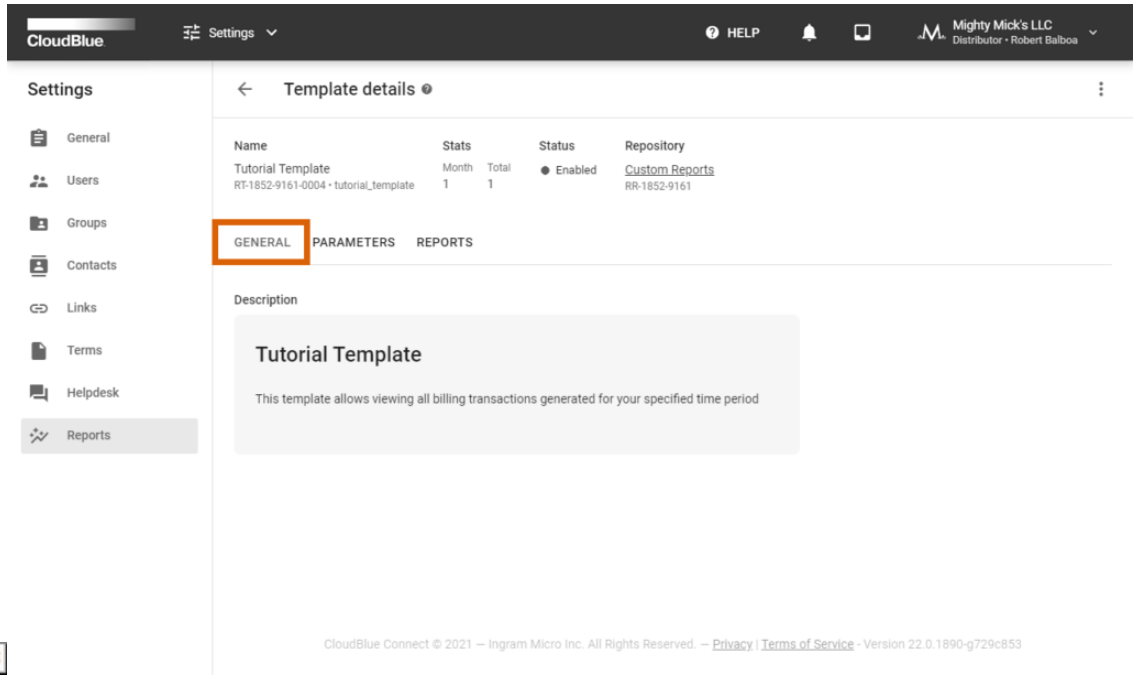

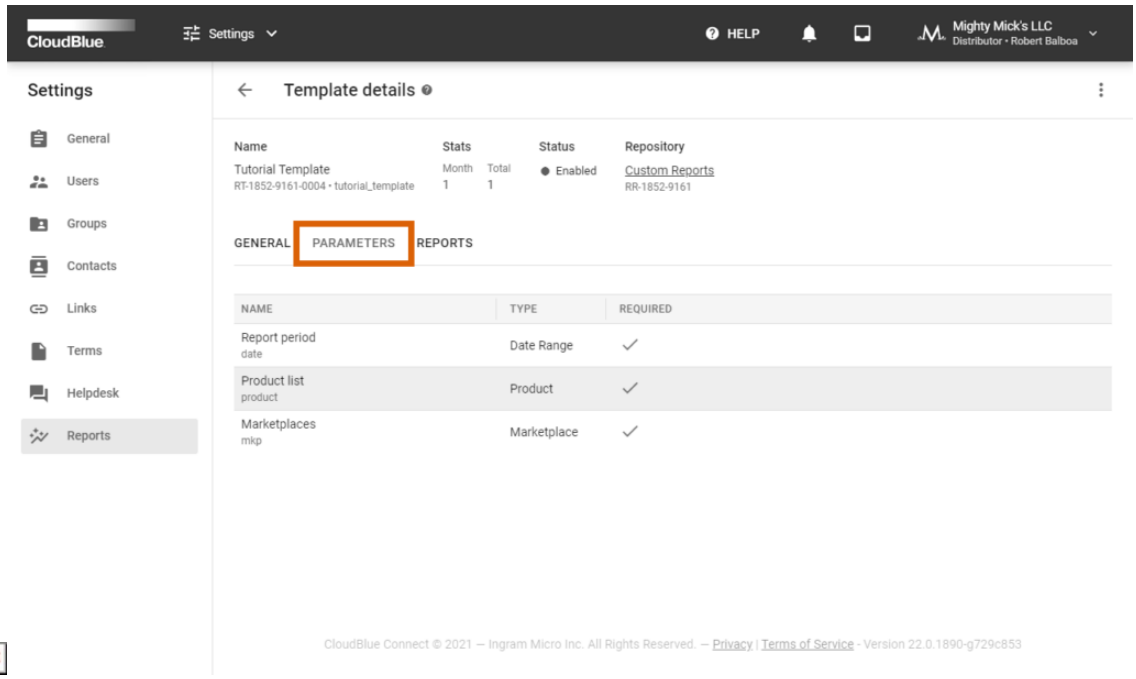

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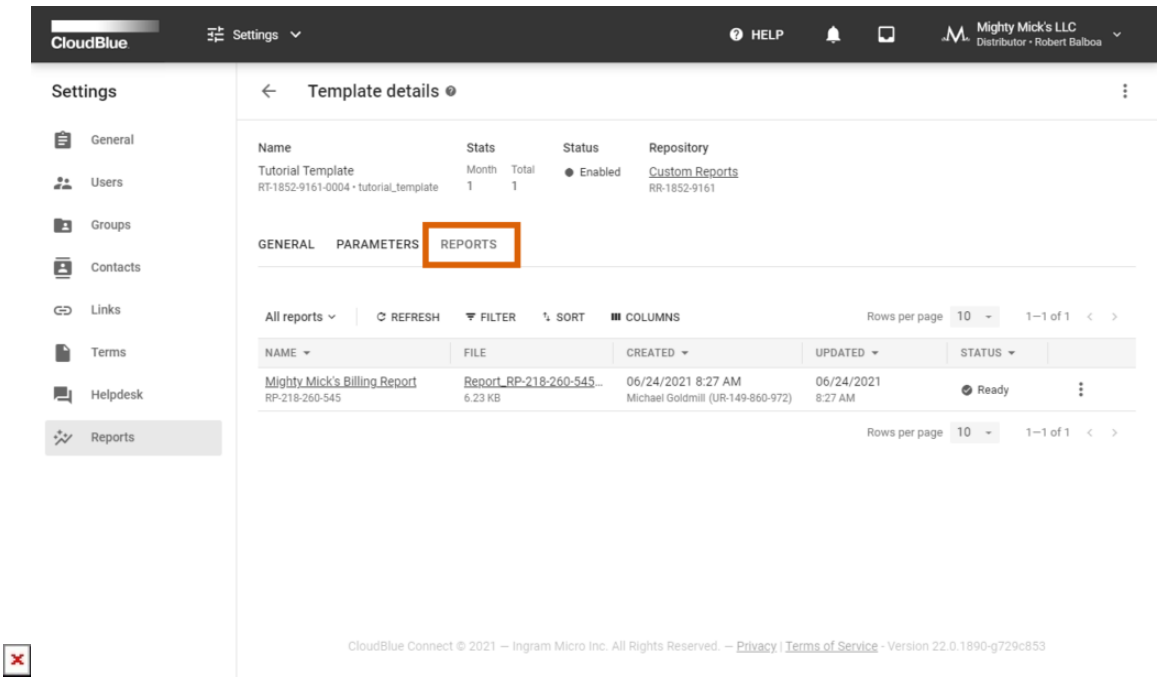

Note that you can also click on the vertical ellipsis (⋮) to *disable* (hide) or *enable* your selected custom report template.

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