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Reports

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Auto-generated at December 9, 2022

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

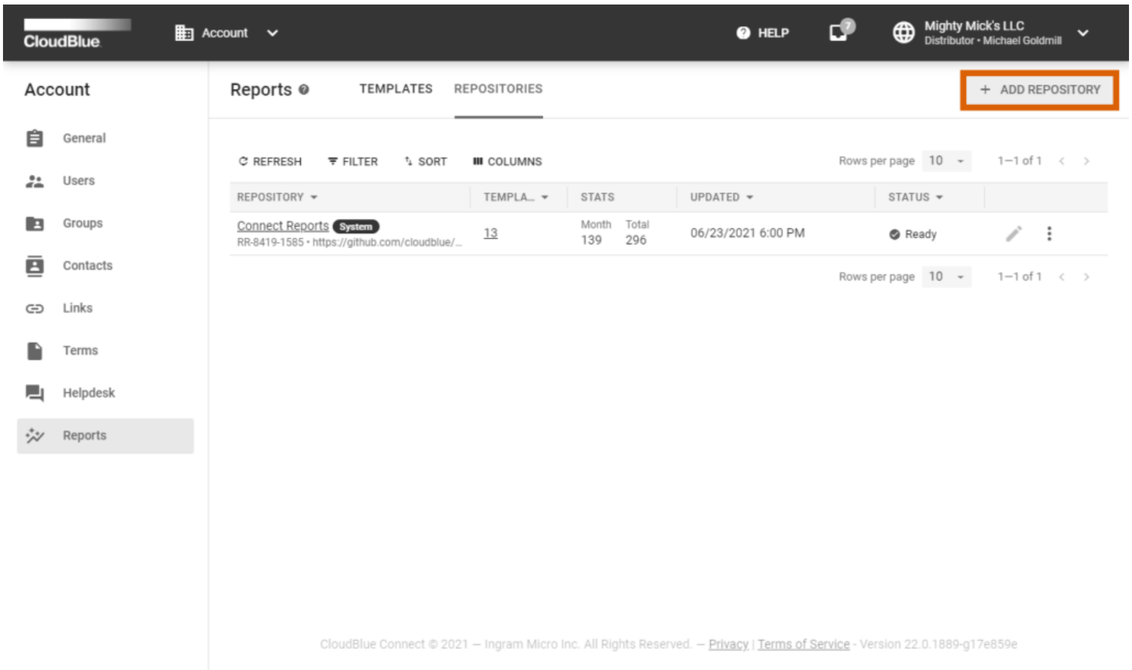
Proceed to the **Repository** tab to review and manage your existing repositories. Add your new repository with your custom report templates as described below.

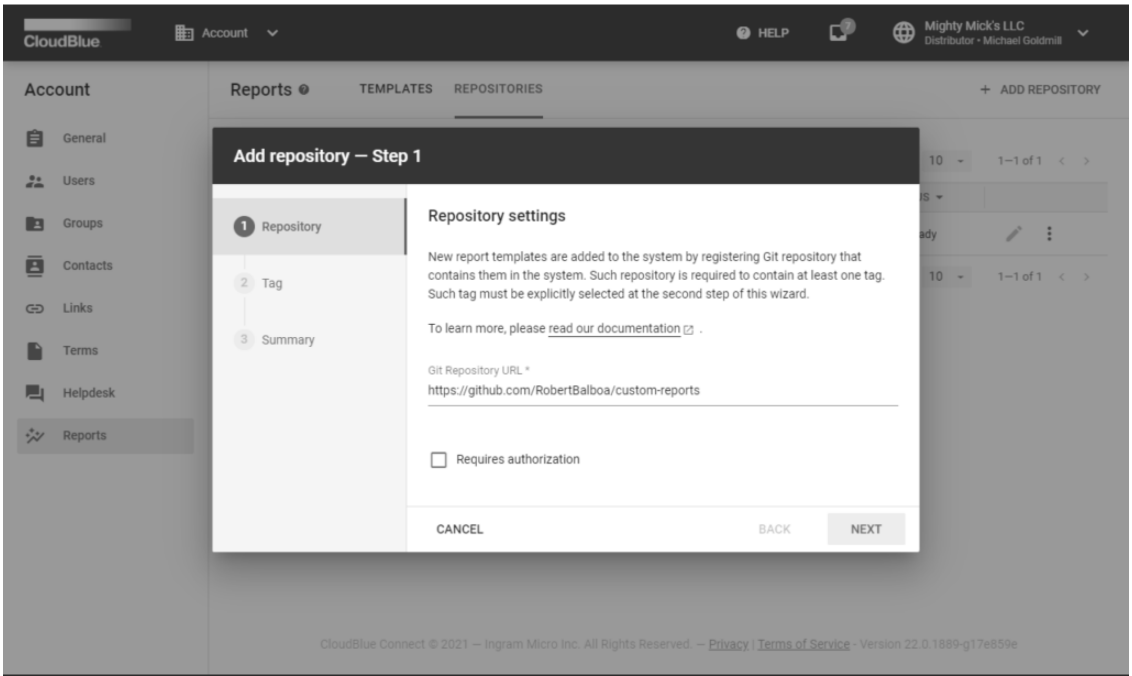
Connect Reports SDK

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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Reports
Reports
TEMPLATES
REPOSITORIES
ADD REPOSITORY
Add repository — Step 1
Repository
Tag
Summary
Repository settings
New report templates are added to the system by registering Git repository that contains them in the system. Such repository is required to contain at least one tag. Such tag must be explicitly selected at the second step of this wizard.
To learn more, please read our documentation .
Git Repository URL *
https://github.com/RobertBalboa/custom-reports
Requires authorization
CANCEL
BACK
NEXT
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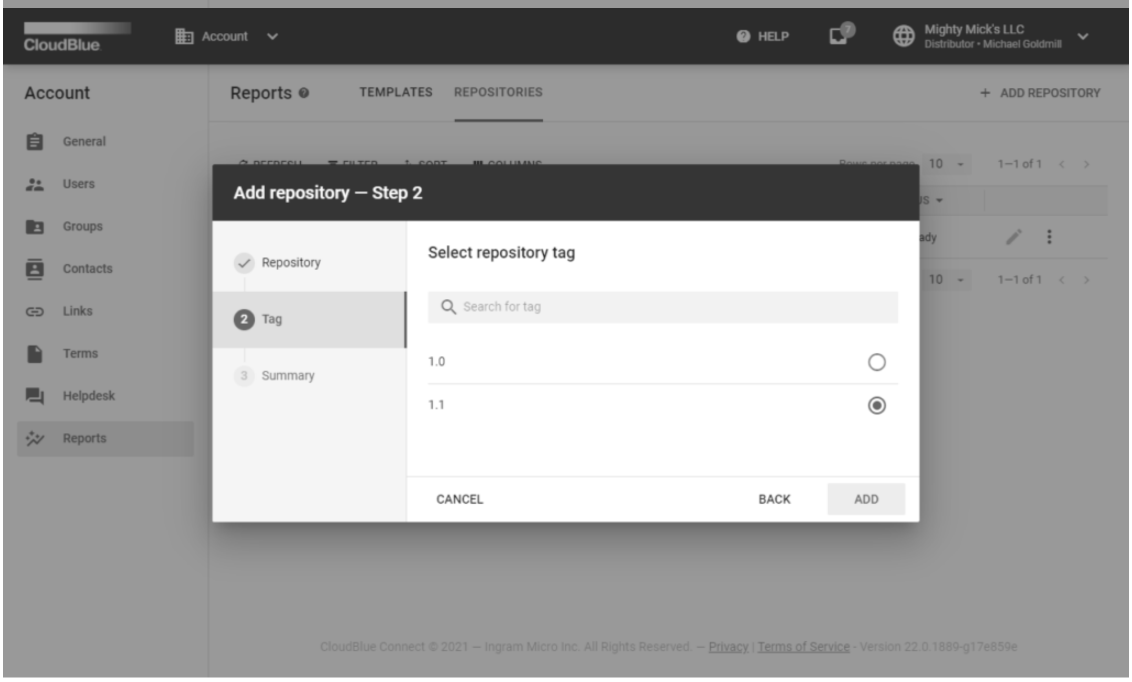
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Reports
Reports
TEMPLATES
REPOSITORIES
ADD REPOSITORY
Add repository — Step 2
Repository
Tag
Summary
Select repository tag
Search for tag
1.0
1.1
CANCEL
BACK
ADD
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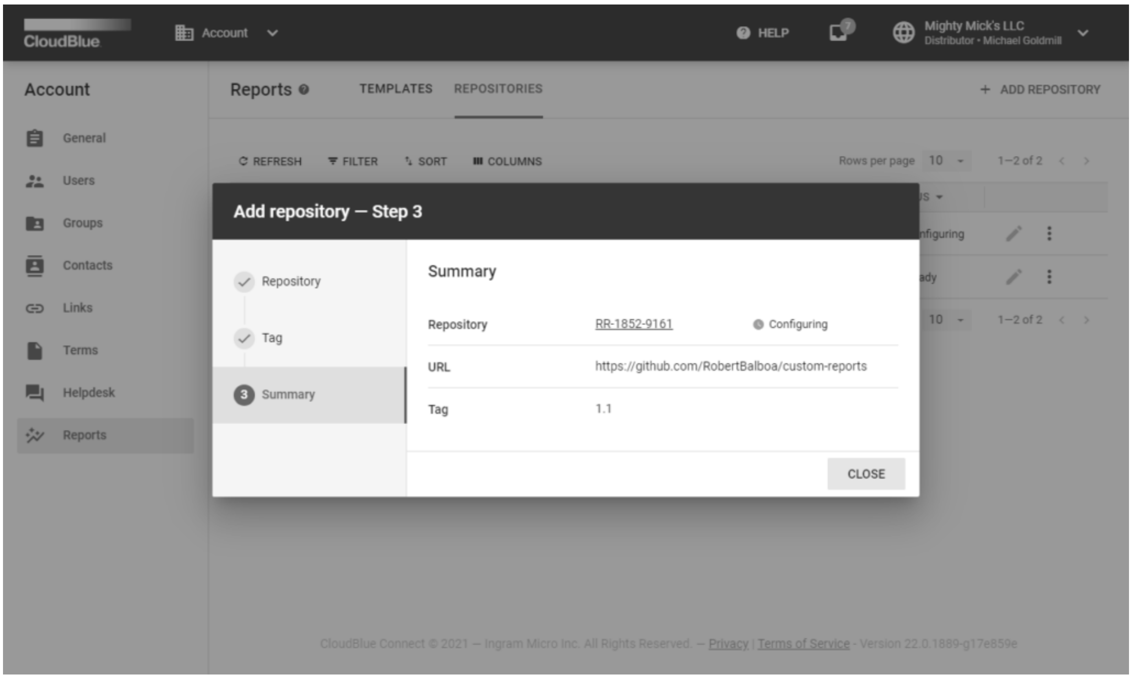
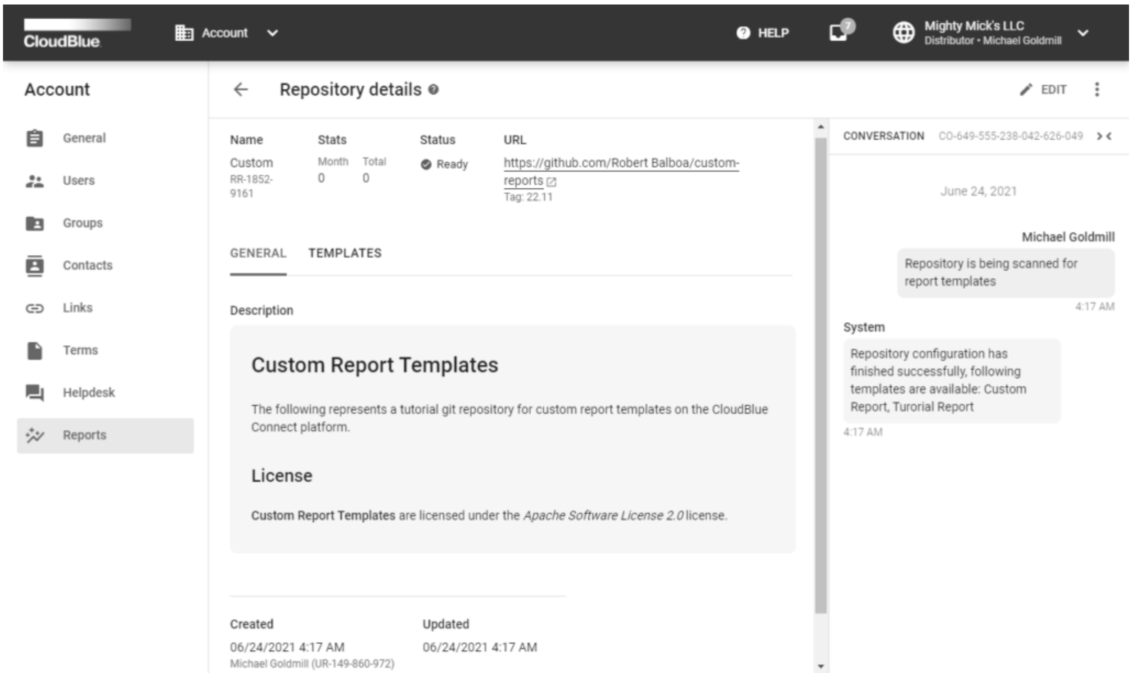


1. **Repository**: Provide your Git URL to the corresponding field. Note that your repository should contain at least one tag. In case your repository requires authorization, check the *Requires Authorization* checkbox and specify your username and password.
2. **Tag**: Select your required tag in the 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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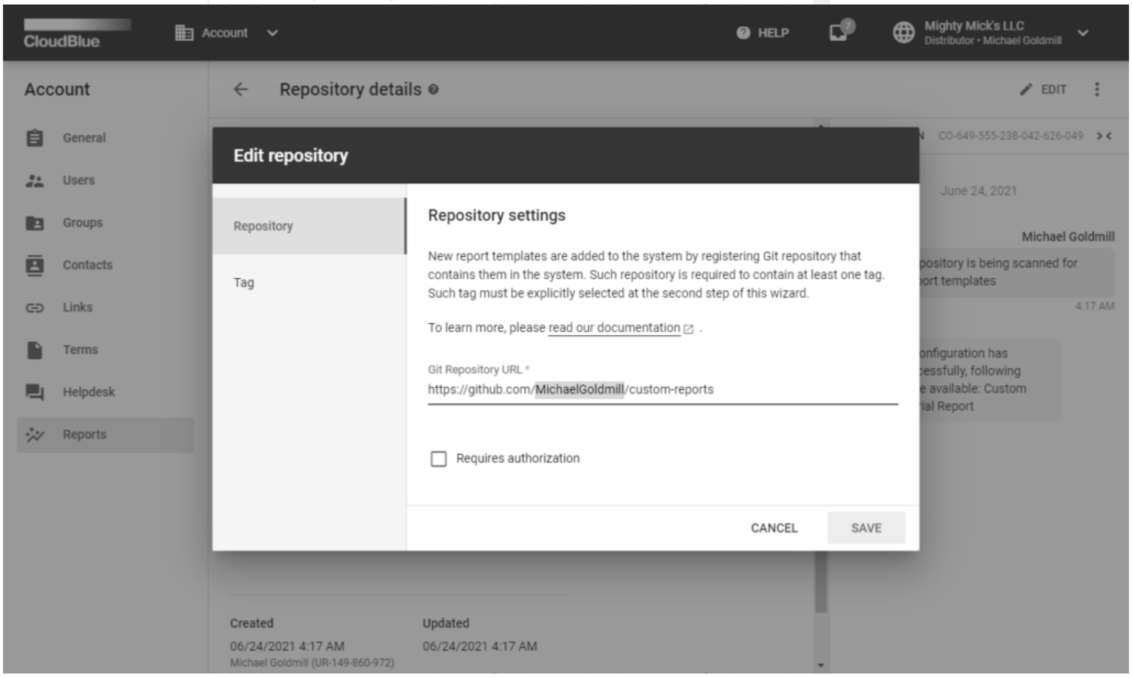
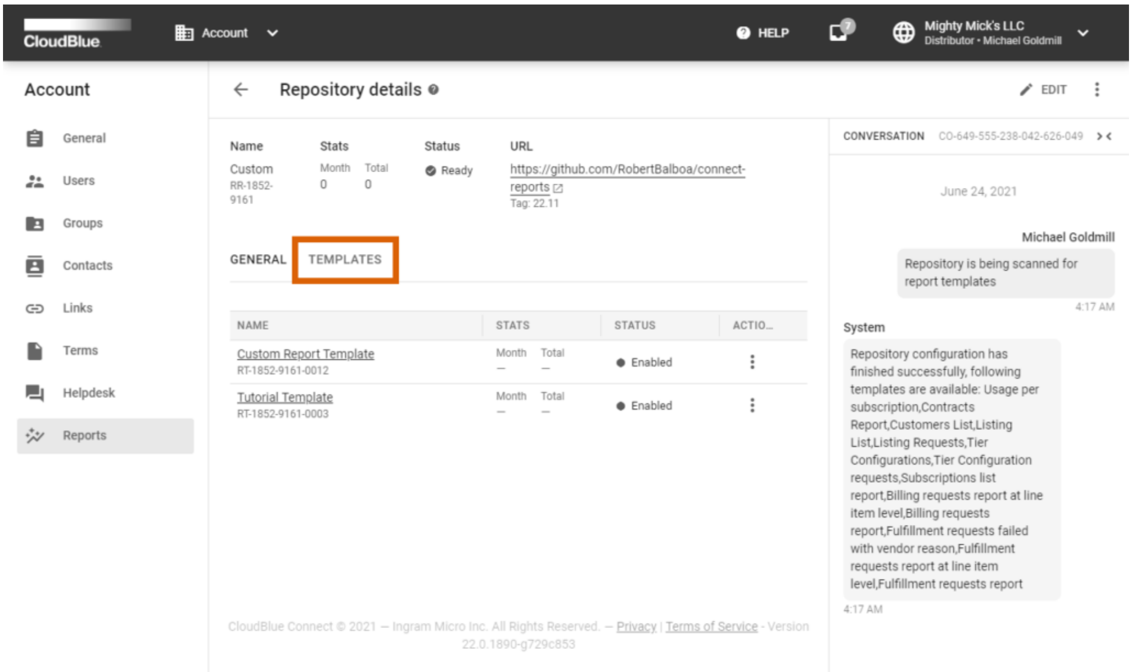
Reports
Repository details
EDIT
Name
Custom
RR-1852-9161
Stats
Month 0
Total 0
Status
Ready
URL
https://github.com/Robert Balboa/custom-reports
Tag: 22.11
GENERAL
TEMPLATES
Description
Custom Report Templates
The following represents a tutorial git repository for custom report templates on the CloudBlue Connect platform.
License
Custom Report Templates are licensed under the Apache Software License 2.0 license.
Created
06/24/2021 4:17 AM
Michael Goldmill (UR-149-860-972)
Updated
06/24/2021 4:17 AM
CONVERSATION
CO-649-555-238-042-626-049
June 24, 2021
Michael Goldmill
Repository is being scanned for report templates
4:17 AM
System
Repository configuration has finished successfully, following templates are available: Custom Report, Turorial Report
4:17 AM


Edit repository
Repository
Tag
Repository settings
New report templates are added to the system by registering Git repository that contains them in the system. Such repository is required to contain at least one tag. Such tag must be explicitly selected at the second step of this wizard.
To learn more, please read our documentation.
Git Repository URL *
https://github.com/MichaelGoldmill/custom-reports
Requires authorization
CANCEL
SAVE



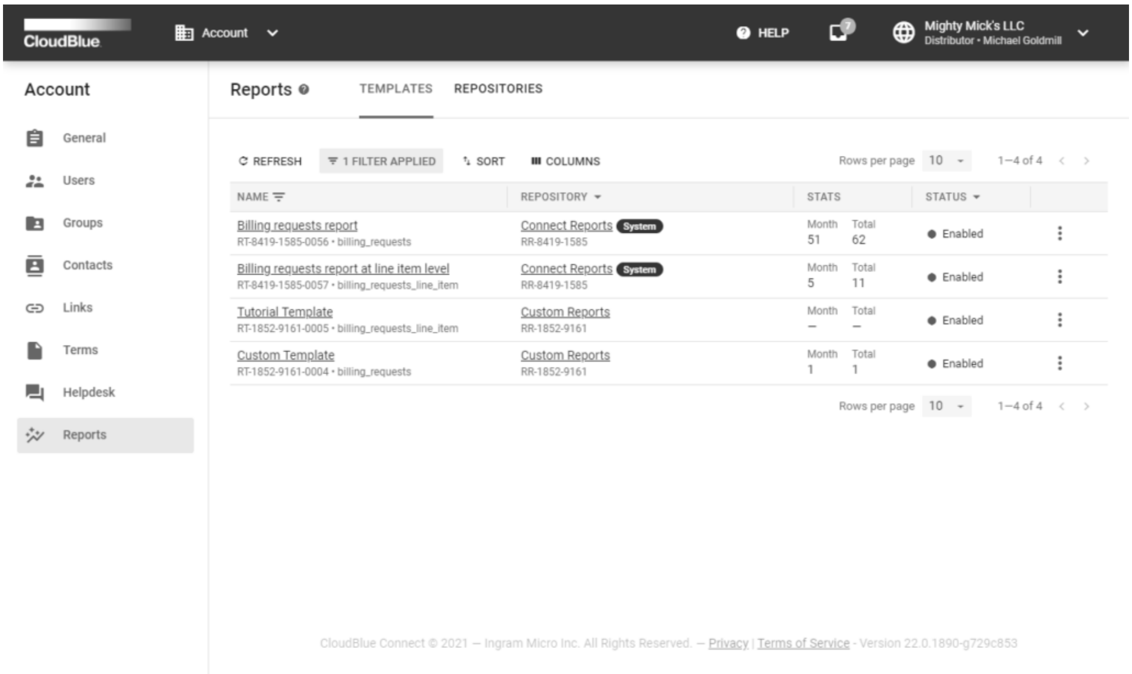
The Repository Details screen displays your repository description within the **General** tab. Note that the system provides this description from your *readme.md* file.

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

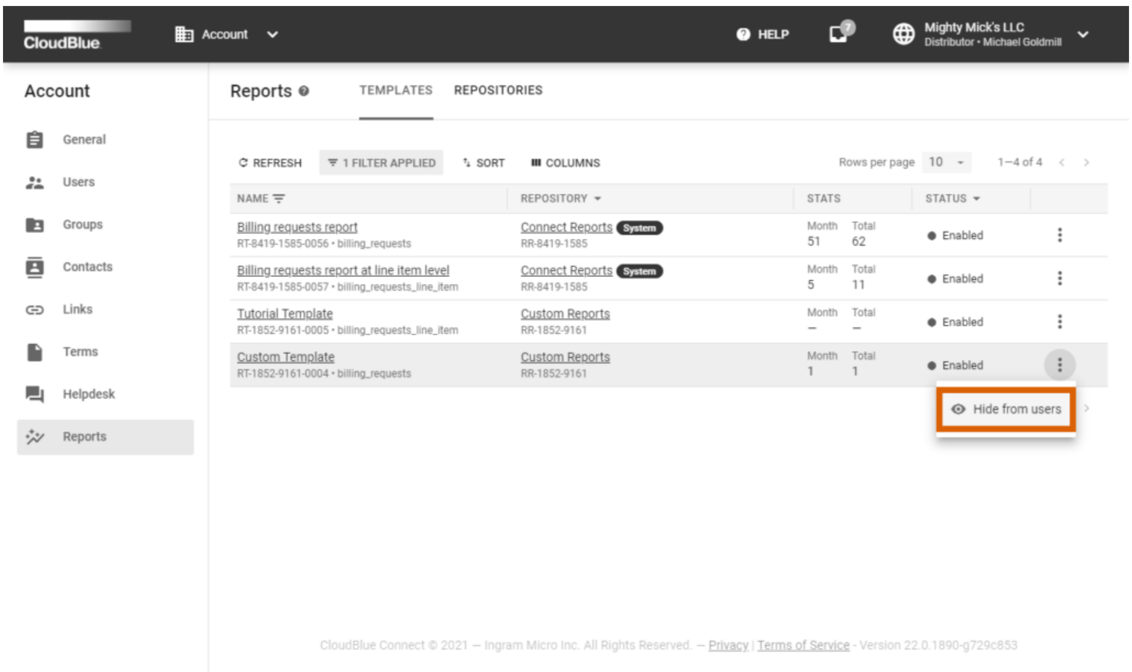
The **Templates** tab from the Reports section allows reviewing all *system* templates (templates that are available on Connect by default) as well as your custom templates that can be added from your Git repositories. Templates define the structure and the content of your generated report files.

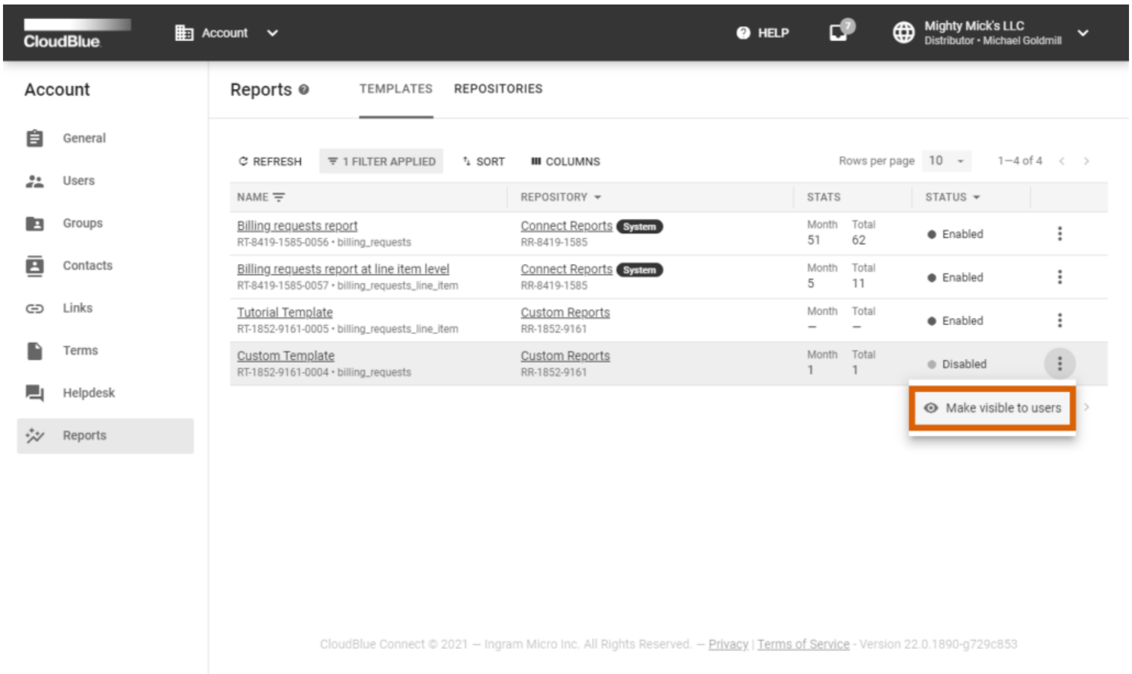


Note that the *Templates* tab also provides statistics that showcase the number of reports that generated using a template (for the last month and in total).

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.





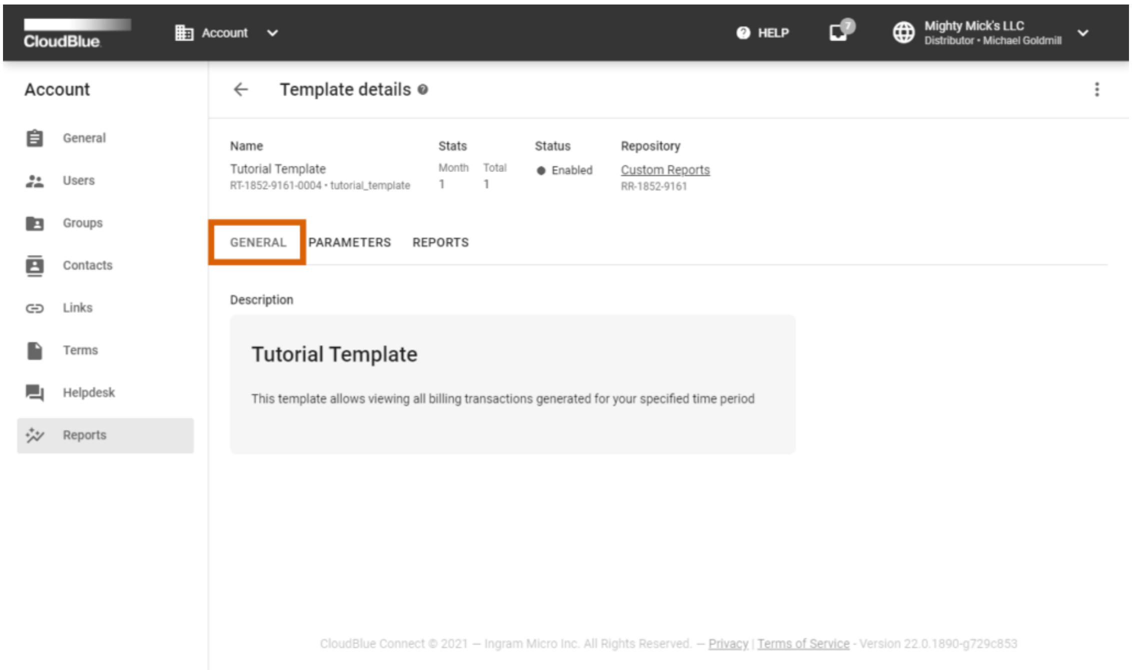
In case your updated repository doesn't include your added templates, the system assigns such templates to the *Blocked* state. Once your repository object is removed, the system automatically deletes its associated templates.

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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Reports
Template details
Name
Tutorial Template
RT-1852-9161-0004 • tutorial_template
Stats
Month Total
1 1
Status
Enabled
Repository
Custom Reports
RR-1852-9161
GENERAL
PARAMETERS
REPORTS
Description
Tutorial Template
This template allows viewing all billing transactions generated for your specified time period
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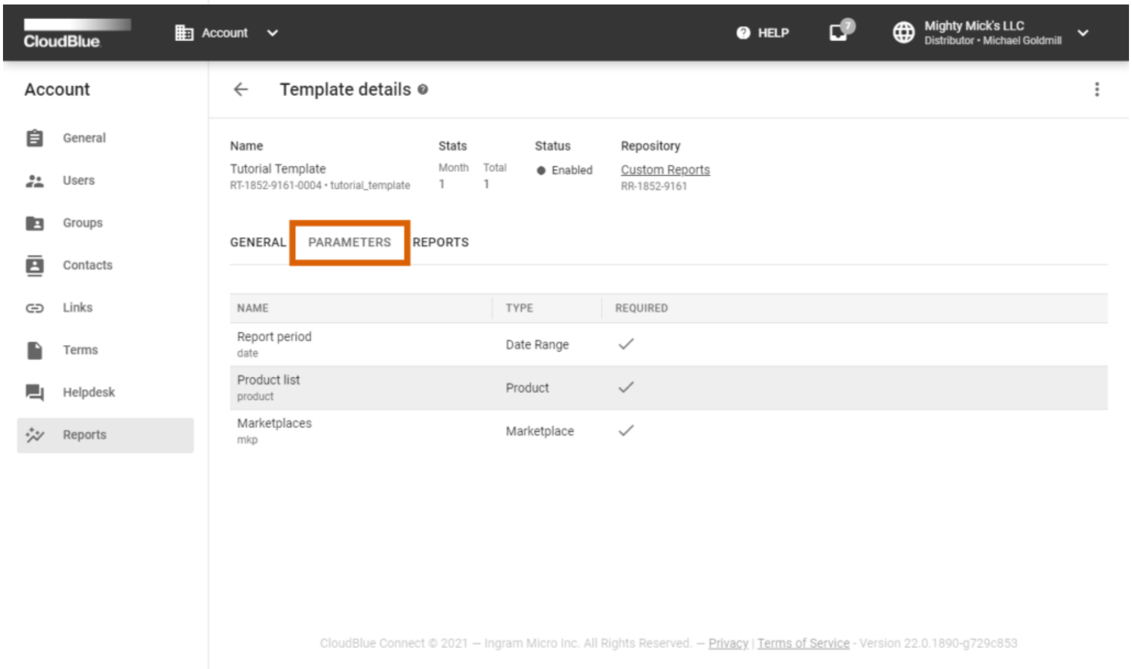
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Reports
Template details
Name
Tutorial Template
RT-1852-9161-0004 • tutorial_template
Stats
Month Total
1 1
Status
Enabled
Repository
Custom Reports
RR-1852-9161
GENERAL
PARAMETERS
REPORTS
NAME
TYPE
REQUIRED
Report period
date
Date Range
Product list
product
Product
Marketplaces
mkp
Marketplace
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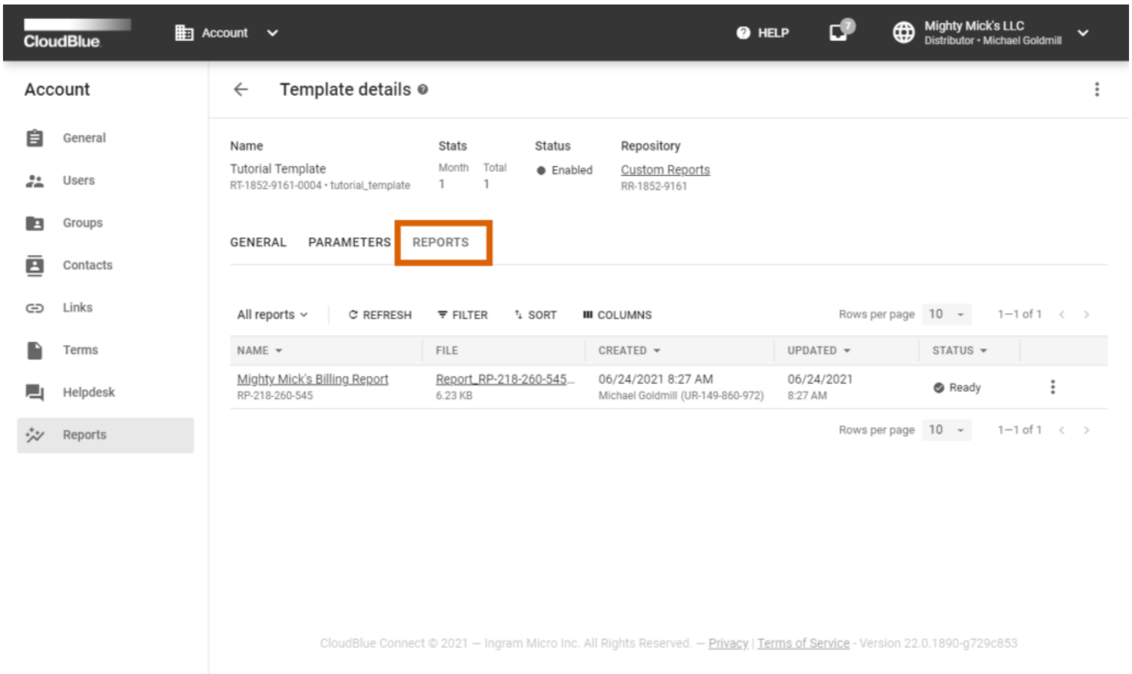

Note that you can also click on the vertical ellipsis (⋮) to *disable* (hide) or *enable* your selected custom report template.