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# Reports



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Auto-generated at April 16, 2025



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.

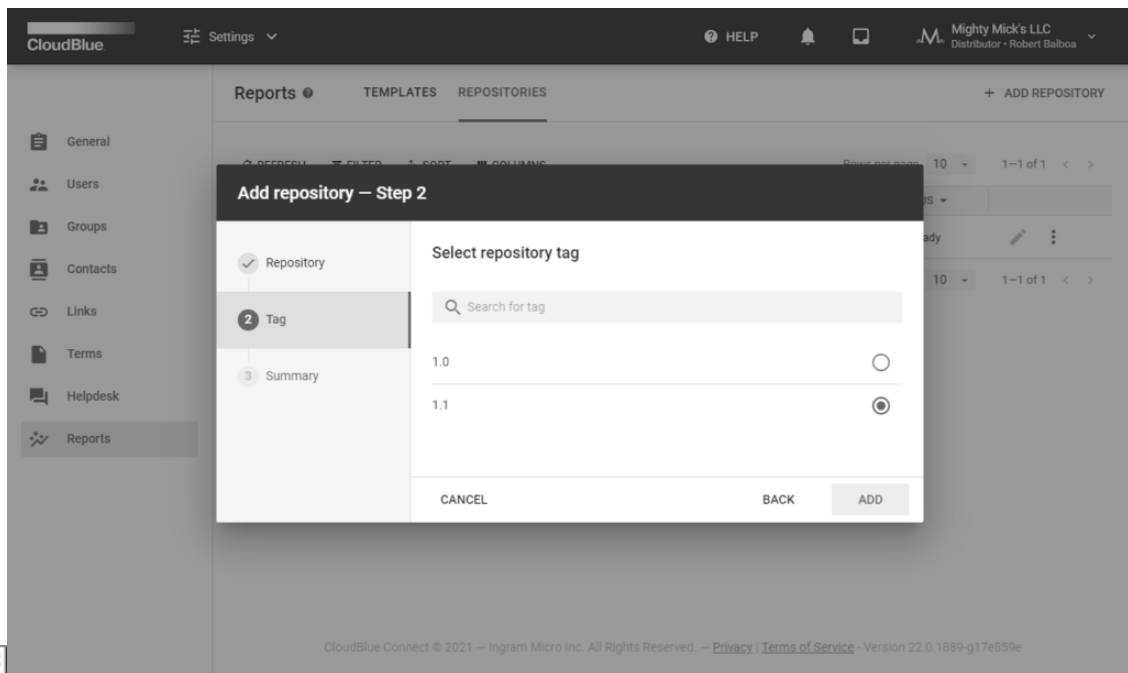
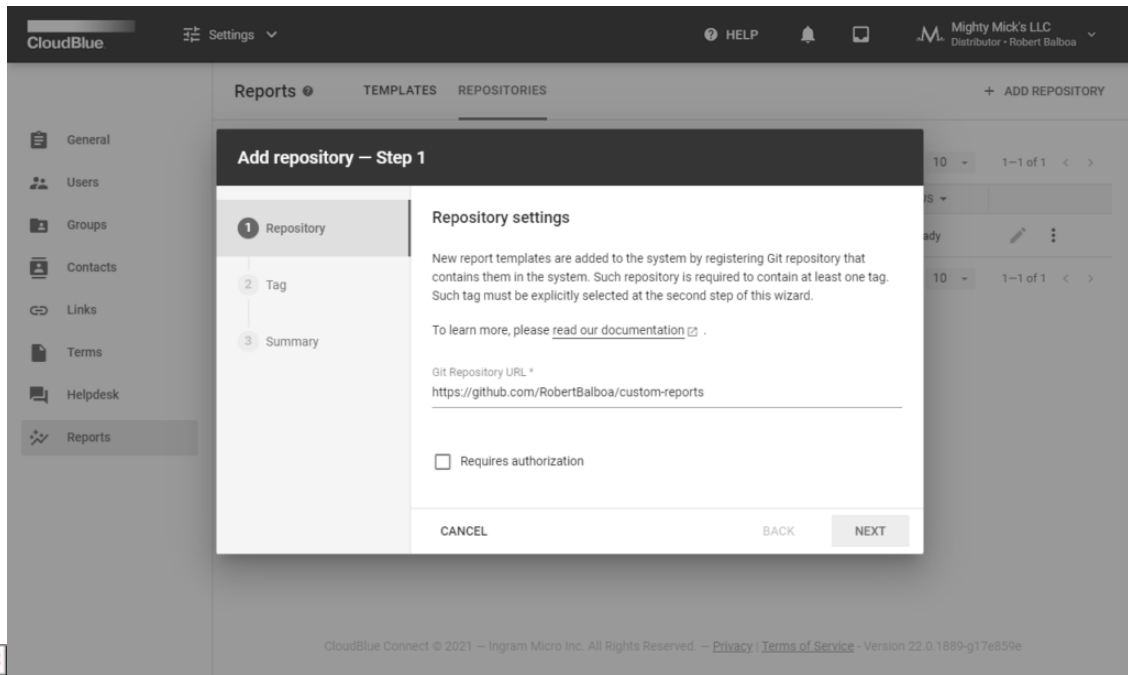
## Adding Repositories

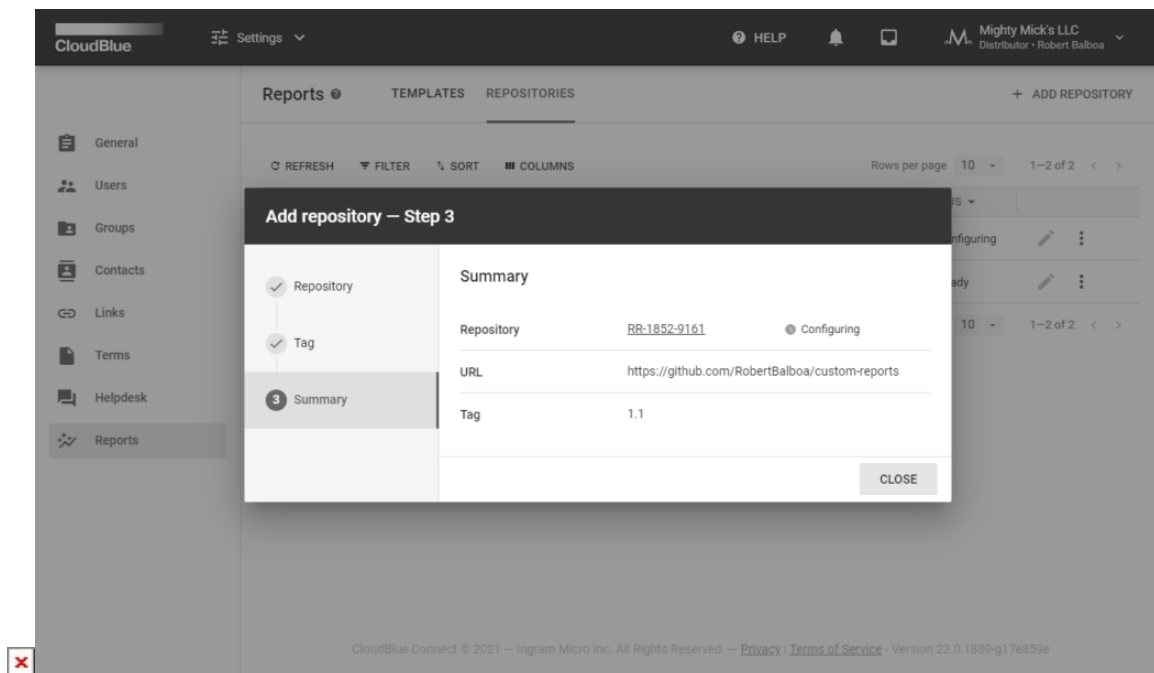
Click the **Add** button to launch a repository wizard. Thereafter, follow the wizard steps to successfully add your repository to the Connect platform.

The screenshot shows the CloudBlue interface with the 'Reports' section active. The 'REPOSITORIES' tab is selected, and a table lists existing repositories. A red box highlights the '+ ADD REPOSITORY' button in the top right corner of the table area.

REPOSITORY	TEMPLA...	STATS	UPDATED	STATUS
Connect Reports <small>System</small> RR-8419-1585 • <a href="https://github.com/cloudblue/">https://github.com/cloudblue/...</a>	13	Month: 139 Total: 296	06/23/2021 6:00 PM	Ready





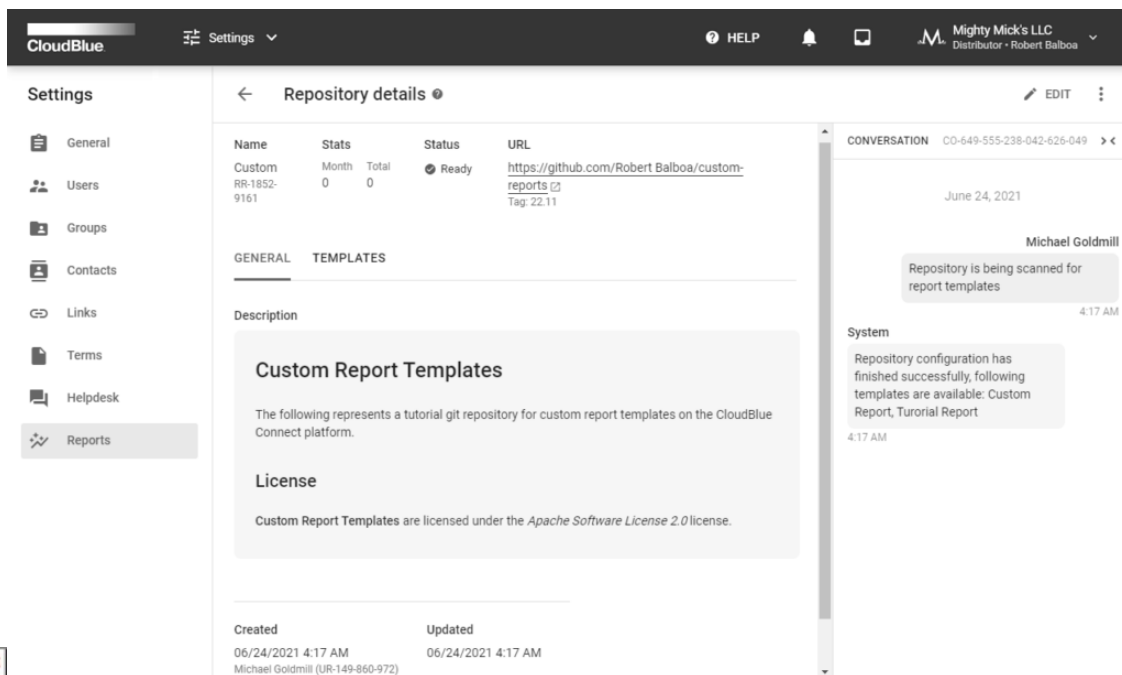






1. **Repository:** Provide your Git URL to the corresponding field. Note that your repository should contain at least one tag. In case your repository requires authorization, check the *Requires Authorization* checkbox and specify your username and password.
2. **Tag:** Select your required tag in the 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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**Settings**

- General
- Users
- Groups
- Contacts
- Links
- Terms
- Helpdesk
- Reports

**Repository details**  EDIT 

Name	Stats	Status	URL
Custom RR-1852-9161	Month: 0 Total: 0	Ready	<a href="https://github.com/Robert Balboa/custom-reports">https://github.com/Robert Balboa/custom-reports</a> 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  
Updated: 06/24/2021 4:17 AM  
Michael Goldmill (UR-149-860-972)

**CONVERSATION** CO-649-555-238-042-626-049 

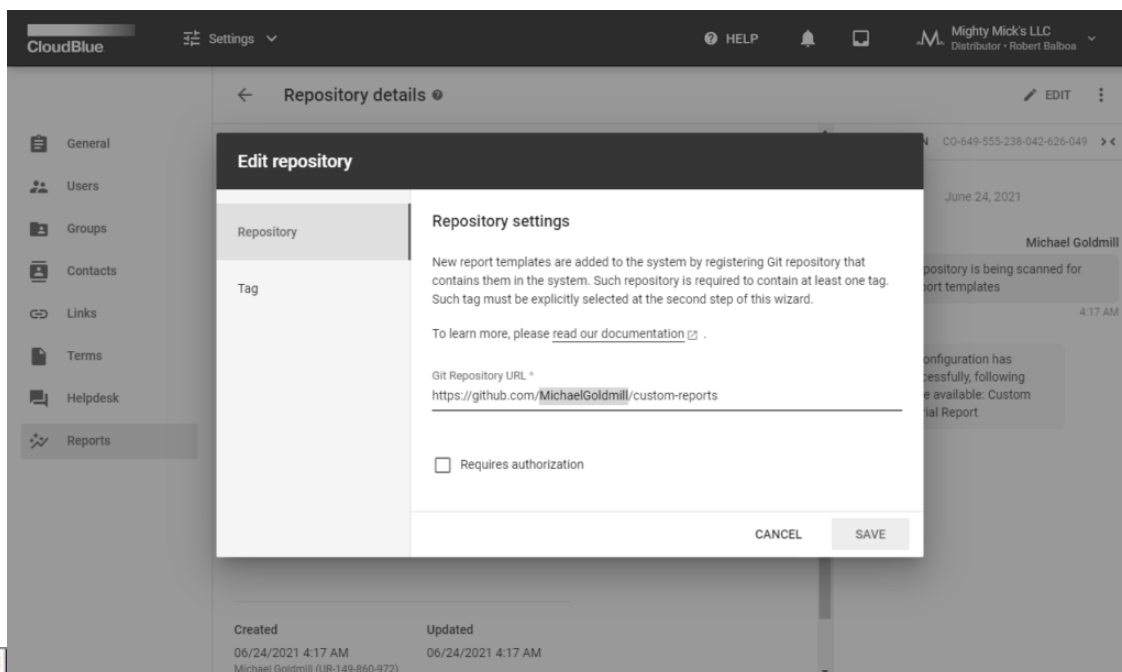
June 24, 2021





**Michael Goldmill**



Repository is being scanned for report templates 4:17 AM

**System**

Repository configuration has finished successfully, following templates are available: Custom Report, Tutorial Report 4:17 AM



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**Repository details**  EDIT 

**Edit repository**

**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

Created: 06/24/2021 4:17 AM  
Updated: 06/24/2021 4:17 AM  
Michael Goldmill (UR-149-860-972)



The screenshot shows the CloudBlue interface. On the left is a 'Settings' sidebar with options like General, Users, Groups, Contacts, Links, Terms, Helpdesk, and Reports. The main area is titled 'Repository details' and has an 'EDIT' button. It shows repository information: Name (Custom), Stats (Month: 0, Total: 0), Status (Ready), and URL (https://github.com/RobertBalboa/connect-reports). Below this are two tabs: 'GENERAL' and 'TEMPLATES' (highlighted with an orange box). The 'TEMPLATES' tab contains a table:

NAME	STATS	STATUS	ACTIO...
Custom Report Template RT-1852-9161-0012	Month: —, Total: —	● Enabled	⋮
Tutorial Template RT-1852-9161-0003	Month: —, Total: —	● Enabled	⋮

At the bottom of the main area, there is a 'System' message: 'Repository is being scanned for report templates' with a timestamp of 4:17 AM. The footer contains copyright information for Ingram Micro Inc.

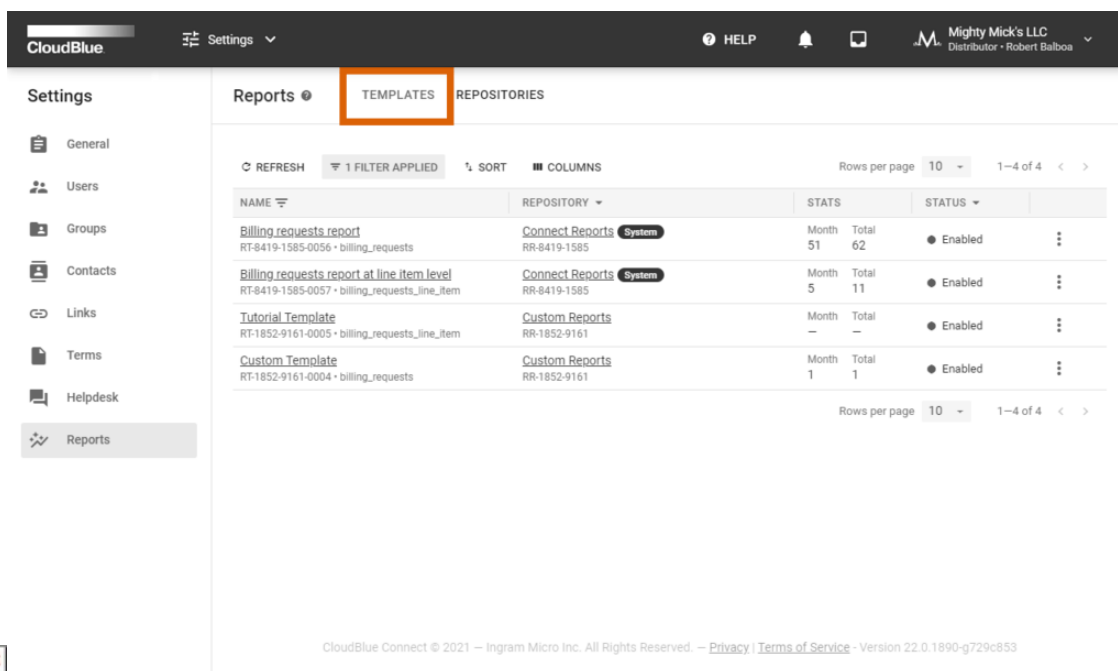
The Repository Details screen displays your repository description within the **General** tab. Note that the system provides this description from your *readme.md* file.

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.



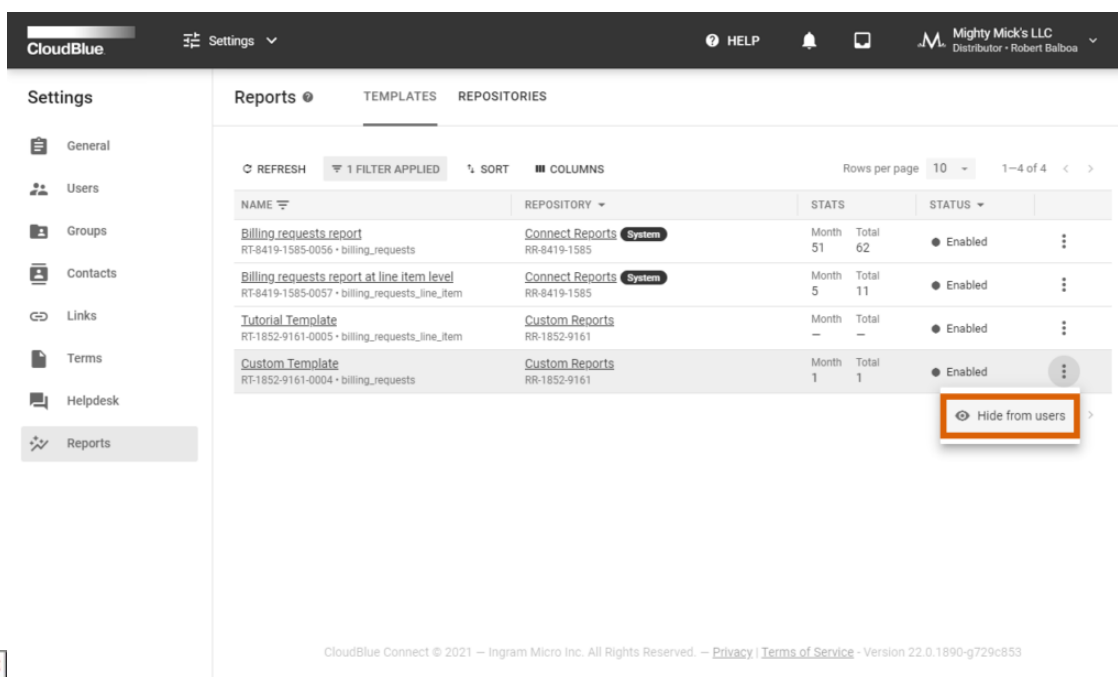
The screenshot shows the CloudBlue interface with the 'Reports' section selected. The 'TEMPLATES' tab is active, displaying a table of report templates. The table has columns for NAME, REPOSITORY, STATS, and STATUS. The data is as follows:

NAME	REPOSITORY	STATS	STATUS
Billing requests report RT-8419-1585-0056 • billing_requests	Connect Reports System RR-8419-1585	Month: 51, Total: 62	Enabled
Billing requests report at line item level RT-8419-1585-0057 • billing_requests_line_item	Connect Reports System RR-8419-1585	Month: 5, Total: 11	Enabled
Tutorial Template RT-1852-9161-0005 • billing_requests_line_item	Custom Reports RR-1852-9161	Month: -, Total: -	Enabled
Custom Template RT-1852-9161-0004 • billing_requests	Custom Reports RR-1852-9161	Month: 1, Total: 1	Enabled

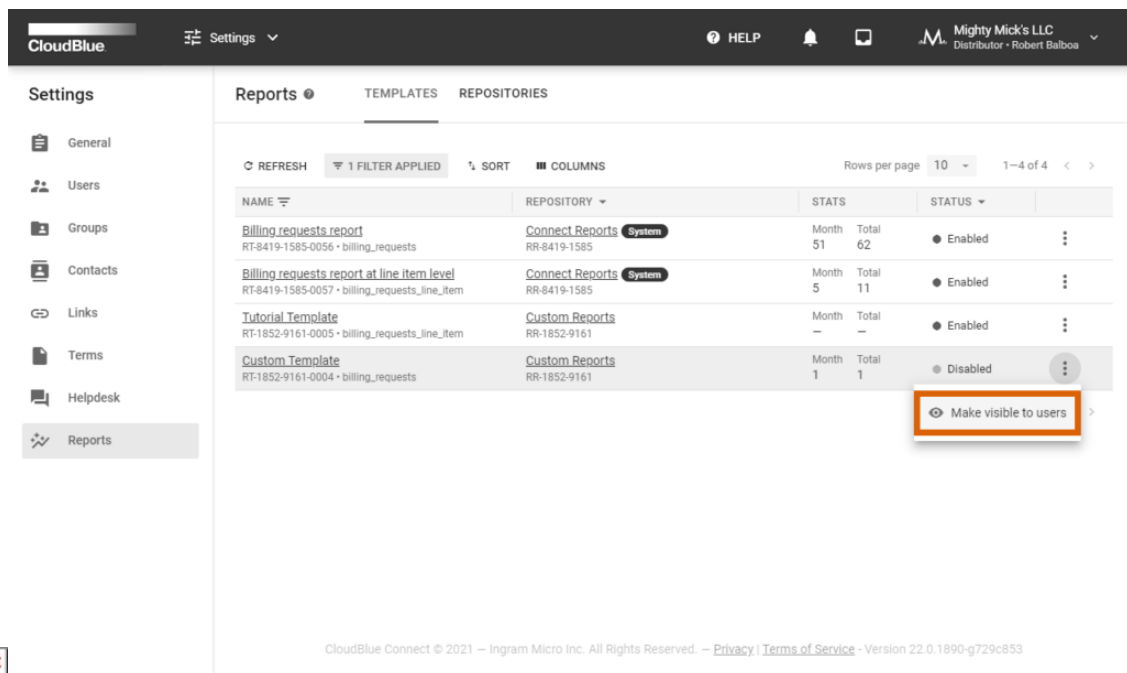
Note that the *Templates* tab also provides statistics that showcase the number of reports that generated using a template (for the last month and in total).

## 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.



This screenshot is similar to the previous one but highlights the 'Hide from users' option in the status dropdown menu for the 'Custom Template' row. The dropdown menu is open, showing the 'Hide from users' option selected.



The screenshot shows the CloudBlue Reports interface. On the left is a 'Settings' sidebar with options like General, Users, Groups, Contacts, Links, Terms, Helpdesk, and Reports. The main area is titled 'Reports' and contains a table of report templates. The table has columns for NAME, REPOSITORY, STATS, and STATUS. There are four rows of templates. The last row, 'Custom Template', is disabled and has a red box around the 'Make visible to users' button in its status column.

NAME	REPOSITORY	STATS	STATUS
Billing requests report RT-8419-1585-0056 • billing_requests	Connect Reports System RR-8419-1585	Month Total 51 62	Enabled
Billing requests report at line item level RT-8419-1585-0057 • billing_requests_line_item	Connect Reports System RR-8419-1585	Month Total 5 11	Enabled
Tutorial Template RT-1852-9161-0005 • billing_requests_line_item	Custom Reports RR-1852-9161	Month Total - -	Enabled
Custom Template RT-1852-9161-0004 • billing_requests	Custom Reports RR-1852-9161	Month Total 1 1	Disabled Make visible to 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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Settings

- General
- Users
- Groups
- Contacts
- Links
- Terms
- Helpdesk
- Reports

← Template details 

Name	Stats	Status	Repository
Tutorial Template RT-1852-9161-0004 • tutorial_template	Month Total 1 1	● Enabled	<a href="#">Custom Reports</a> 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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Settings

- General
- Users
- Groups
- Contacts
- Links
- Terms
- Helpdesk
- Reports

← Template details 

Name	Stats	Status	Repository
Tutorial Template RT-1852-9161-0004 • tutorial_template	Month Total 1 1	● Enabled	<a href="#">Custom Reports</a> 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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**Settings**

- General
- Users
- Groups
- Contacts
- Links
- Terms
- Helpdesk
- Reports

**Template details**

Name	Stats	Status	Repository
Tutorial Template RT-1852-9161-0004 • tutorial_template	Month: 1 Total: 1	● Enabled	Custom Reports RR-1852-9161

GENERAL   PARAMETERS   **REPORTS**

All reports   REFRESH   FILTER   SORT   COLUMNS   Rows per page: 10   1-1 of 1

NAME	FILE	CREATED	UPDATED	STATUS	
<u>Mighty Mick's Billing Report</u> RP-218-260-545	<u>Report RP-218-260-545...</u> 6.23 KB	06/24/2021 8:27 AM Michael Goldmill (UR-149-860-972)	06/24/2021 8:27 AM	● Ready	

Rows per page: 10   1-1 of 1

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