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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.

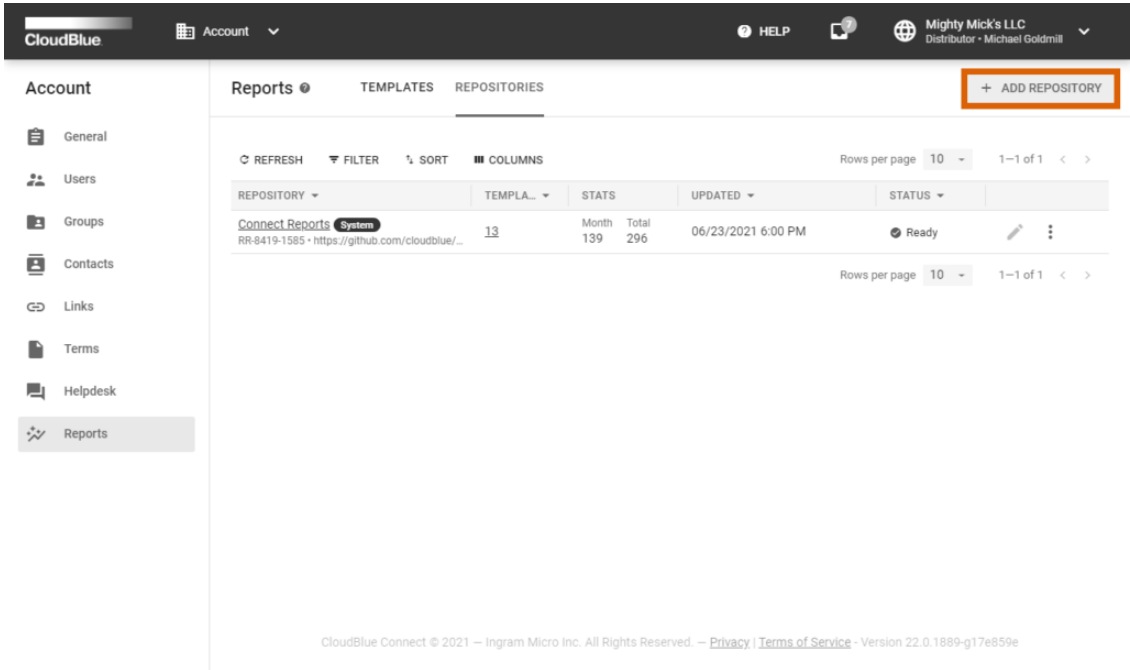


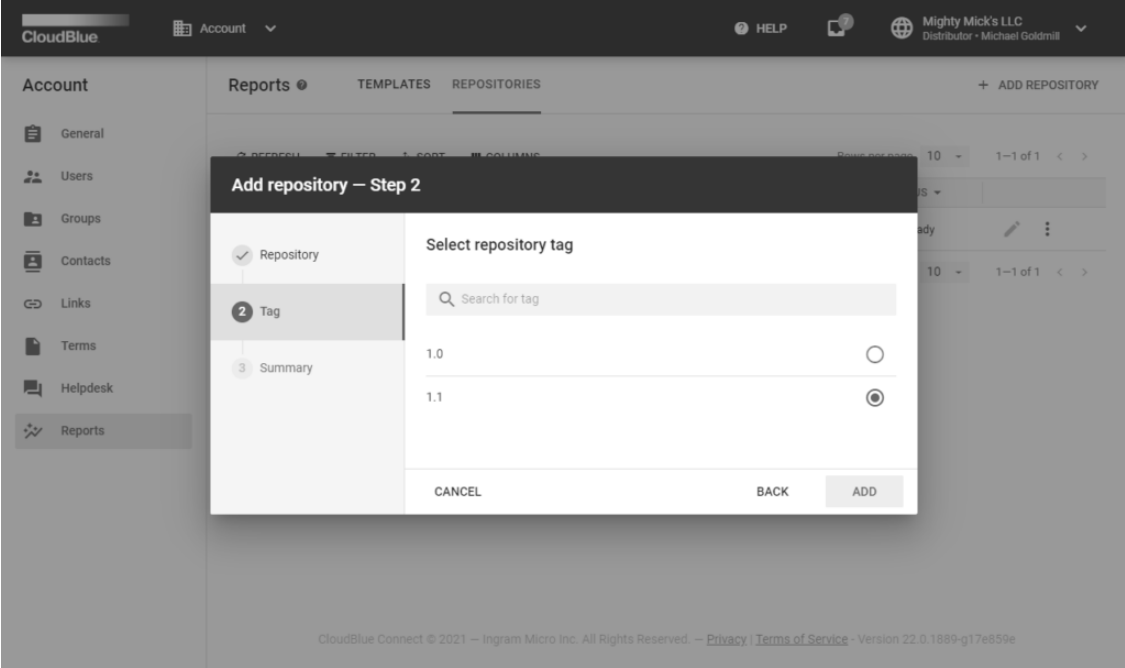
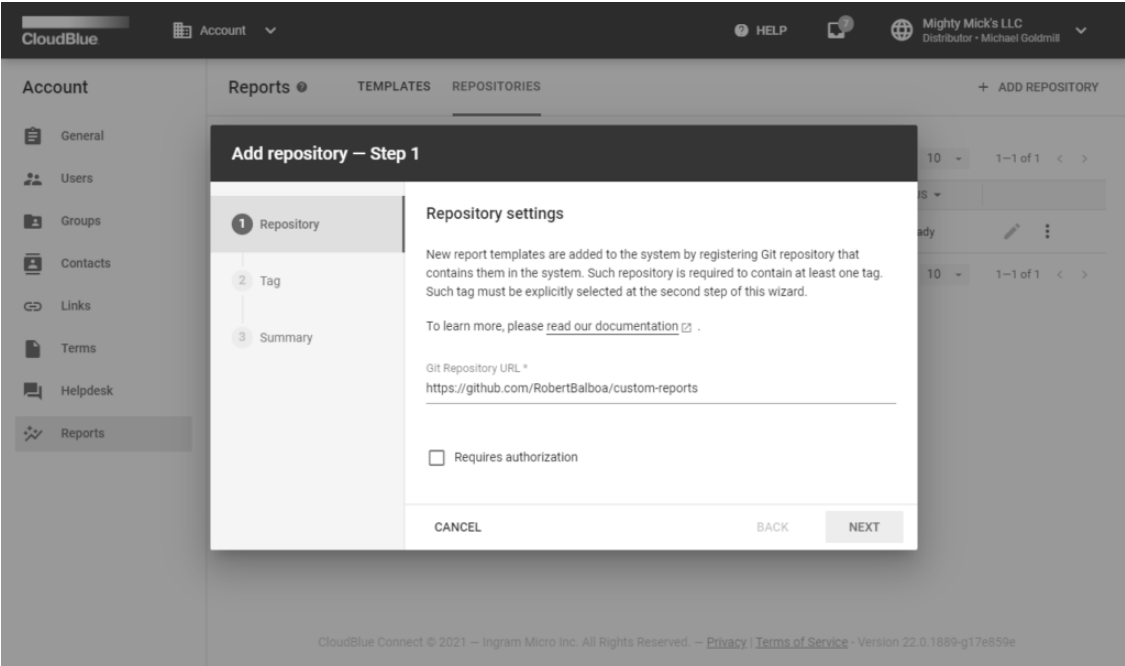
Connect Reports SDK

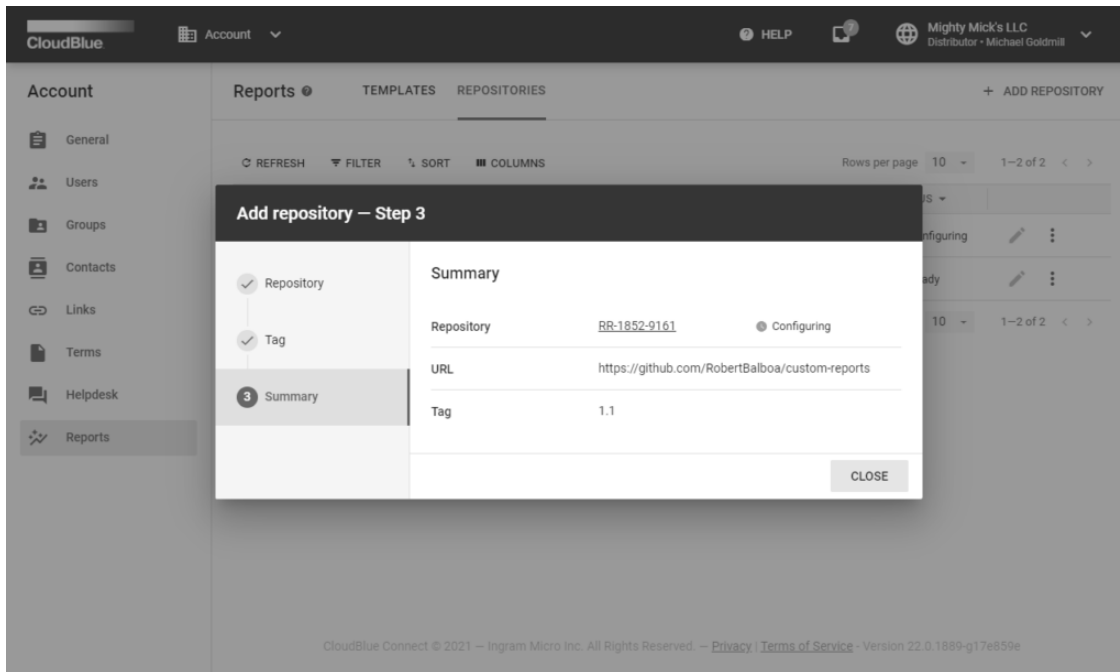
Create custom report templates by following the instructions from the Connect Reports SDK documentation on the Connect Community page. Once your custom report templates are created successfully, upload these templates to your Git repository and add it to the Connect platform as described below.

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.







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:

Repository details

Name	Stats	Status	URL
Custom RR-1852-9161	Month: 0 Total: 0	Ready	https://github.com/RobertBalboa/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, Tutorial Report 4:17 AM

Repository details

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](#).

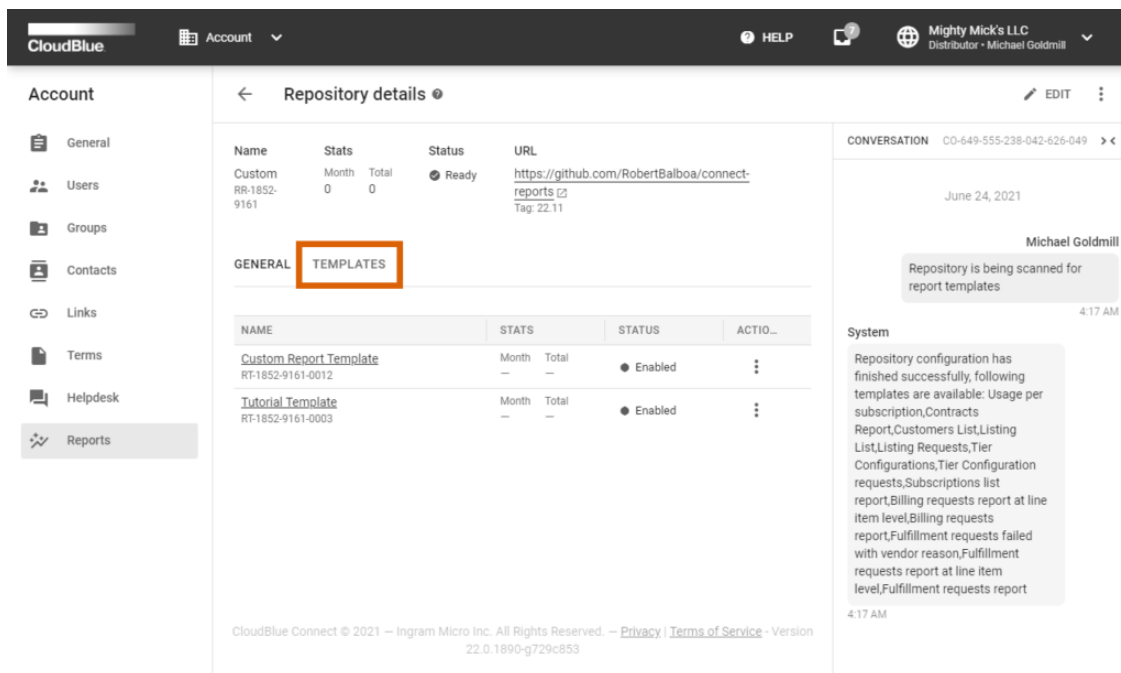
Git Repository URL*

Requires authorization

CANCEL SAVE

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

Updated 06/24/2021 4:17 AM



The screenshot shows the 'Repository details' page in CloudBlue. The 'TEMPLATES' tab is selected and highlighted with an orange box. The page displays repository information and a table of templates.

Name	Stats	Status	URL
Custom RR-1852-9161	Month: 0 Total: 0	● Ready	https://github.com/RobertBalboa/connect-reports Tag: 22.11

NAME	STATS	STATUS	ACTION
<u>Custom Report Template</u> RT-1852-9161-0012	Month: -- Total: --	● Enabled	⋮
<u>Tutorial Template</u> RT-1852-9161-0003	Month: -- Total: --	● Enabled	⋮

System message: Repository is being scanned for report templates. 4:17 AM

System message: Repository configuration has finished successfully, following templates are available: Usage per subscription,Contracts Report,Customers List,Listing List,Listing Requests,Tier Configurations,Tier Configuration requests,Subscriptions list report,Billing requests report at line item level,Billing requests report,Fulfillment requests failed with vendor reason,Fulfillment requests report at line item level,Fulfillment requests report. 4:17 AM

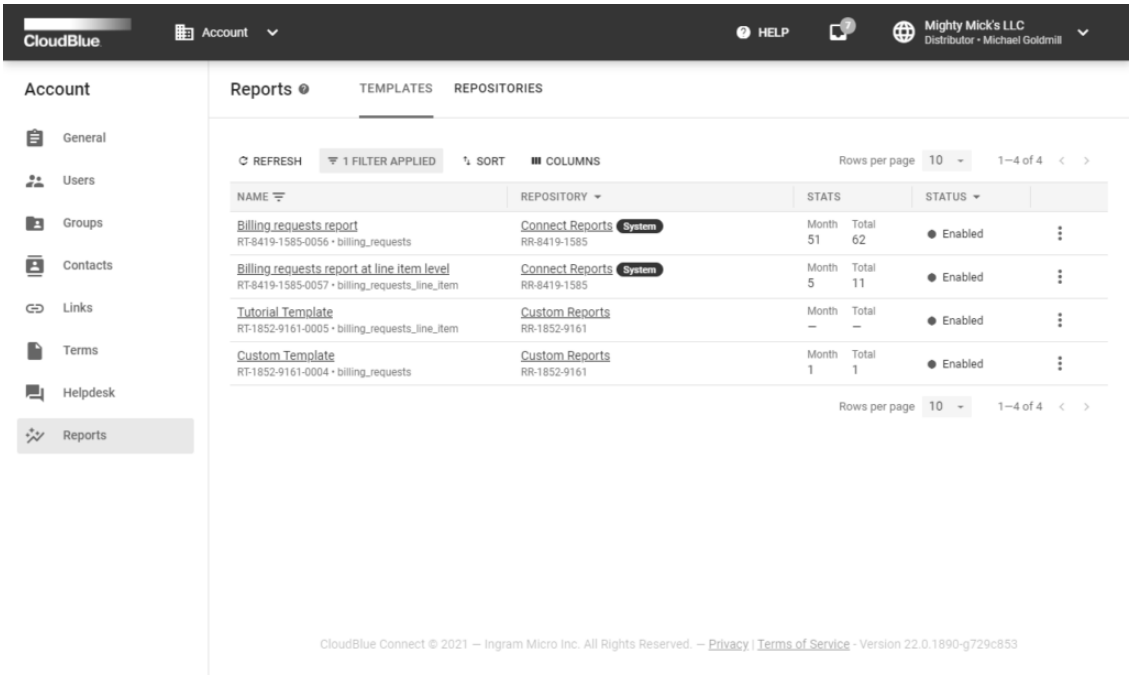
The Repository Details screen displays your repository description within the **General** tab. Note that the system provides this description from your *readme.md* file.

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

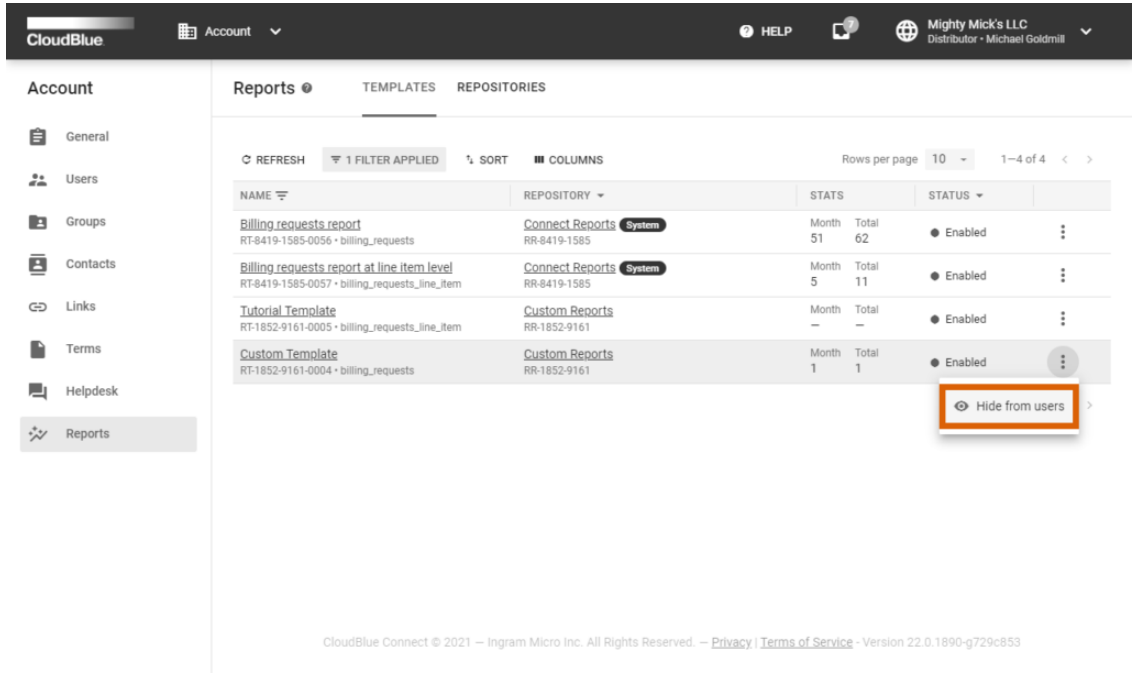
The **Templates** tab from the Reports section allows reviewing all *system* templates (templates that are available on Connect by default) as well as your custom templates that can be added from your Git repositories. Templates define the structure and the content of your generated report files.

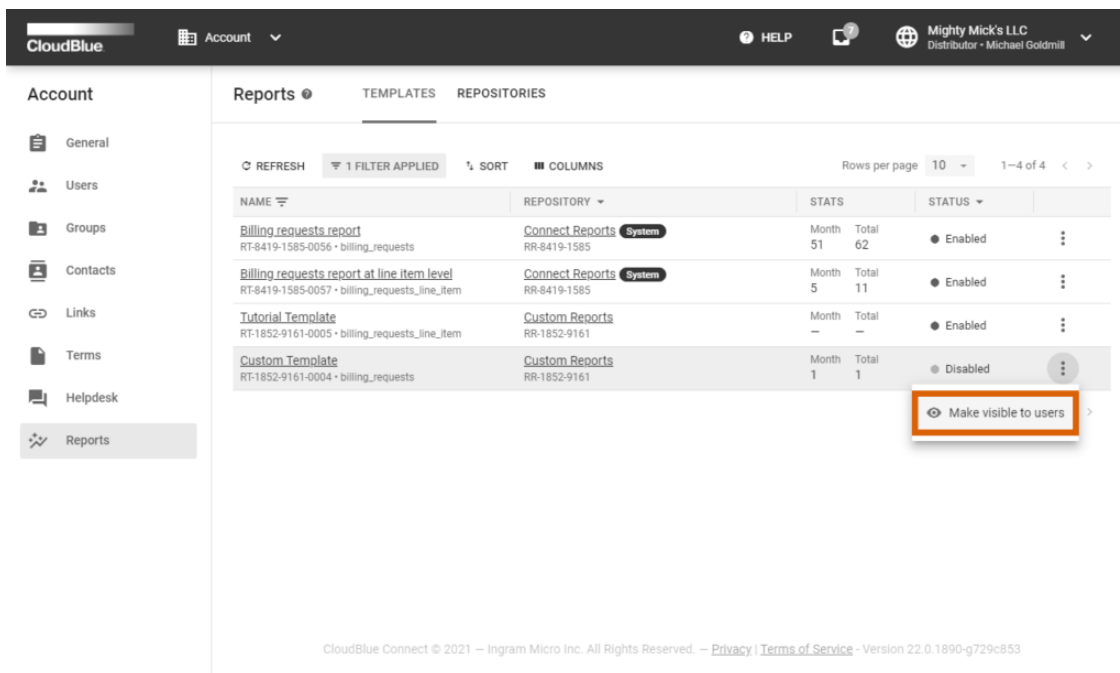


Note that the *Templates* tab also provides statistics that showcase the number of reports that generated using a template (for the last month and in total).

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.





The screenshot shows the CloudBlue Reports interface. The left sidebar contains navigation options: Account, General, Users, Groups, Contacts, Links, Terms, Helpdesk, and Reports. The main content area is titled 'Reports' and includes tabs for 'TEMPLATES' and 'REPOSITORIES'. Below the tabs is a table with columns for NAME, REPOSITORY, STATS, and STATUS. The table contains four rows of report templates. The 'Make visible to users' button is highlighted with a red box.

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	Disabled

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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.

CloudBlue Account Account HELP Mighty Mick's LLC Distributor • Michael Goldmill

Account

- 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	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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Account

- 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	Custom Reports RR-1852-9161

GENERAL PARAMETERS REPORTS

NAME	TYPE	REQUIRED
Report period date	Date Range	✓
Product list product	Product	✓
Marketplaces mip	Marketplace	✓

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The screenshot shows the 'Template details' page for a report template. The left sidebar contains navigation options: Account, General, Users, Groups, Contacts, Links, Terms, Helpdesk, and Reports. The main content area has a breadcrumb '← Template details' and a table with columns: Name, Stats (Month, Total), Status, and Repository. Below this, there are tabs for GENERAL, PARAMETERS, and REPORTS (highlighted). Under the REPORTS tab, there are controls for 'All reports', 'REFRESH', 'FILTER', 'SORT', 'COLUMNS', and 'Rows per page'. A table lists report entries with columns: NAME, FILE, CREATED, UPDATED, and STATUS. One entry is visible: 'Mighty Mick's Billing Report' with file 'Report_RP-218-260-545...', created on 06/24/2021 at 8:27 AM, updated on 06/24/2021 at 8:27 AM, and status 'Ready'. A vertical ellipsis icon is next to the status. At the bottom, there is a footer: 'CloudBlue Connect © 2021 – Ingram Micro Inc. All Rights Reserved. – Privacy | Terms of Service - Version 22.0.1890-g729c853'.

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