

[Documentation](#) → [Modules](#) →

Reports



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Introduction

Reports represent instances that have data exported from the CloudBlue Connect platform. Reports can be especially useful to extract required data and import it to external systems for further processing, such as billing or reconciliation operations.

Reports can be created via the **Reports** module on the Connect platform. Thus, a **System** report will be generated. Such reports contain predefined report parameters (specified via *templates*) and corresponding export data.

Additionally, it is possible to export any data from the platform via Custom Reports SDK. Therefore, a **Custom** report will be created. Custom reports contain any of your specified report parameters and consequently can provide any information for the export.

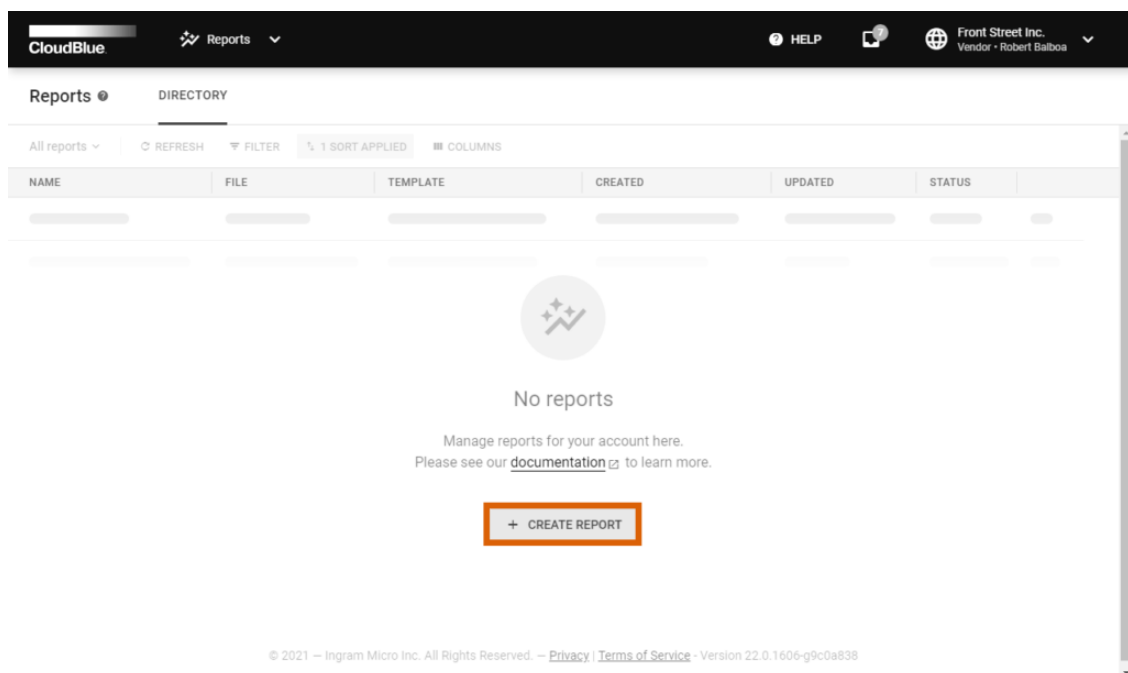
Once a report instance is created, the system starts to process your export operation. In case the report processing is successful, the system provides a report file and displays *Ready* in the report status. Thereafter, it is possible to download and delete your report file.

Follow the instructions below and learn how to generate, download or delete report files on the Connect platform.

Creating Reports

Navigate to the **Reports** module to access your reports.

Click the **Create Report** button to launch a report creation wizard.



Follow the wizard instructions to successfully create a report instance.

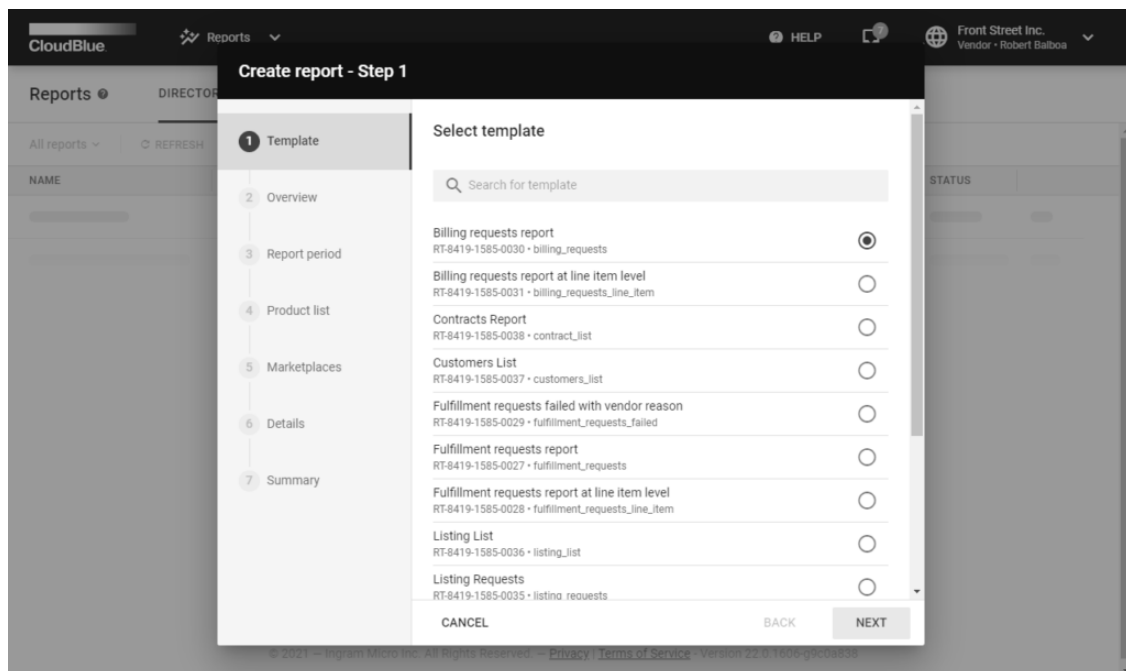
Select a template

Choose your template from the list. These templates represent predefined report formats that allow exporting data from one or multiple Connect modules.



Information

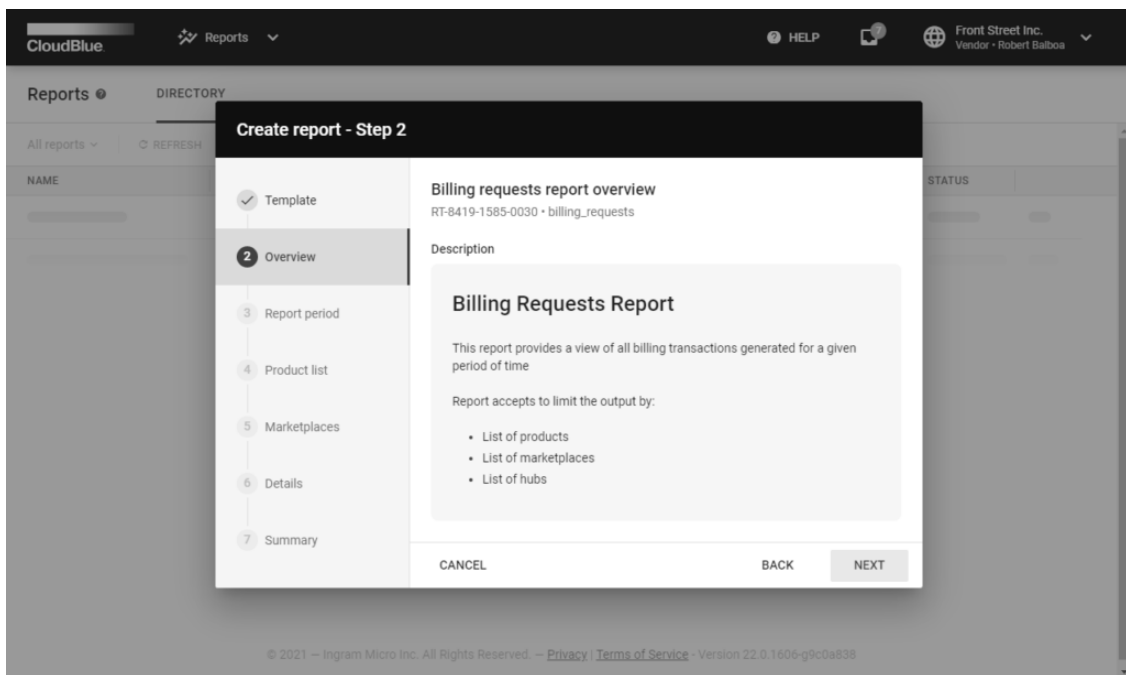
Note that the wizard steps change depending on your selected template.



Click the **Next** button to continue.

Overview

The wizard displays different overviews depending on your selected template.



Review the provided description and click **Next** to continue.

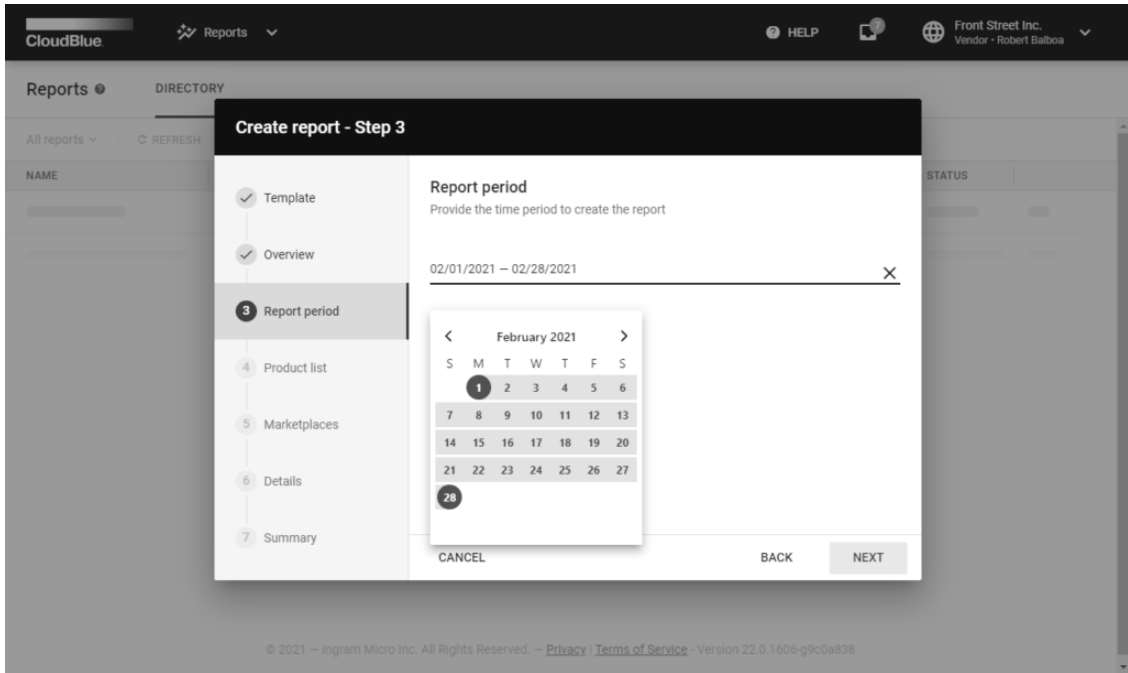
Parameters

The wizard provides different parameter steps for your selected report template. In general, it requires selecting report period, choosing a product, and specifying marketplaces or statuses. The following example showcases the **Billing Request Report** configuration.

Report period

Select a report period by clicking on the provided field.

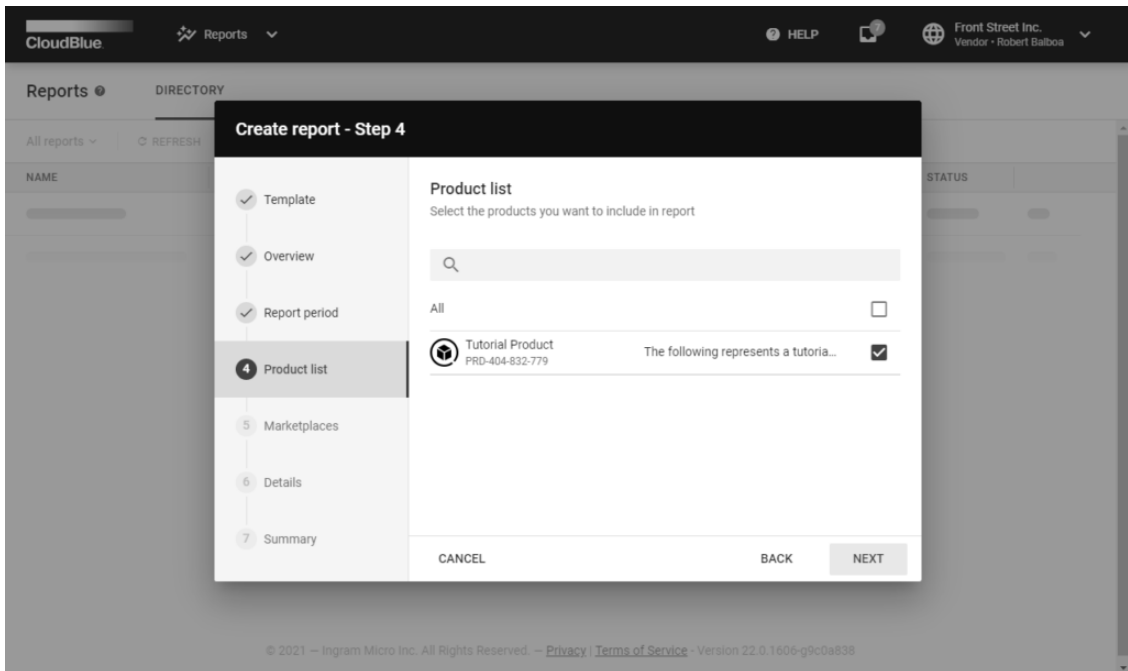
Choose the start date from the calendar by clicking on it. Thereafter, specify the end date by clicking on the calendar once again.



Make sure that selected period is correct and click **Next** to continue.

Product list

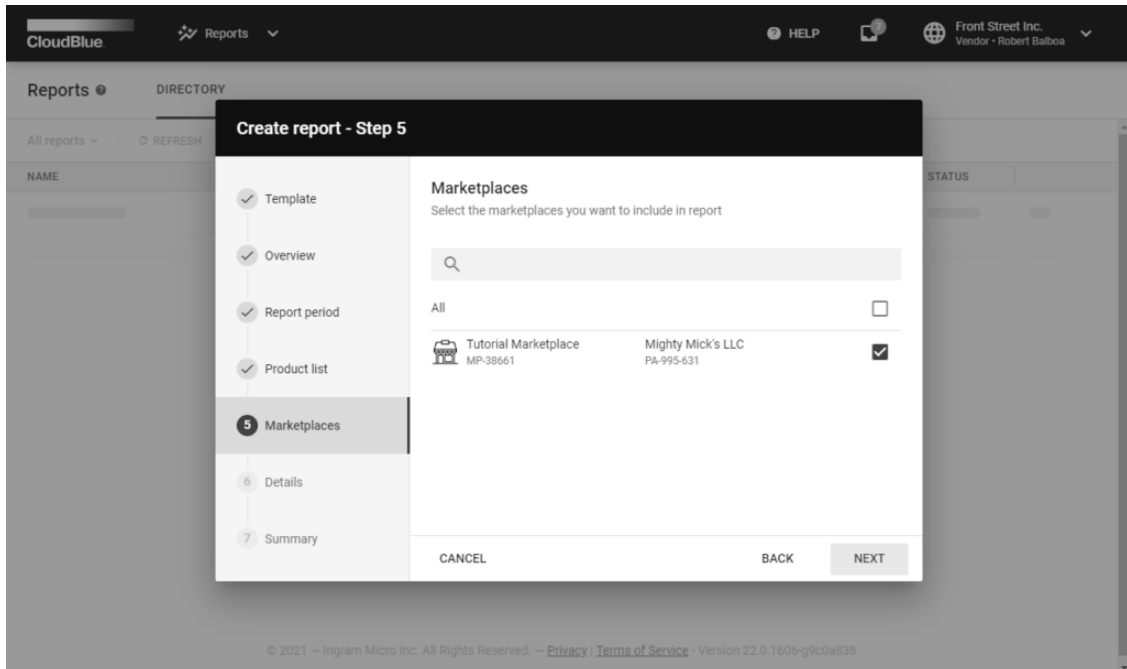
Specify a product from the following product list.



In case you want to select all available products, check the **All** checkbox.

Marketplace

Select a marketplace from the following list.

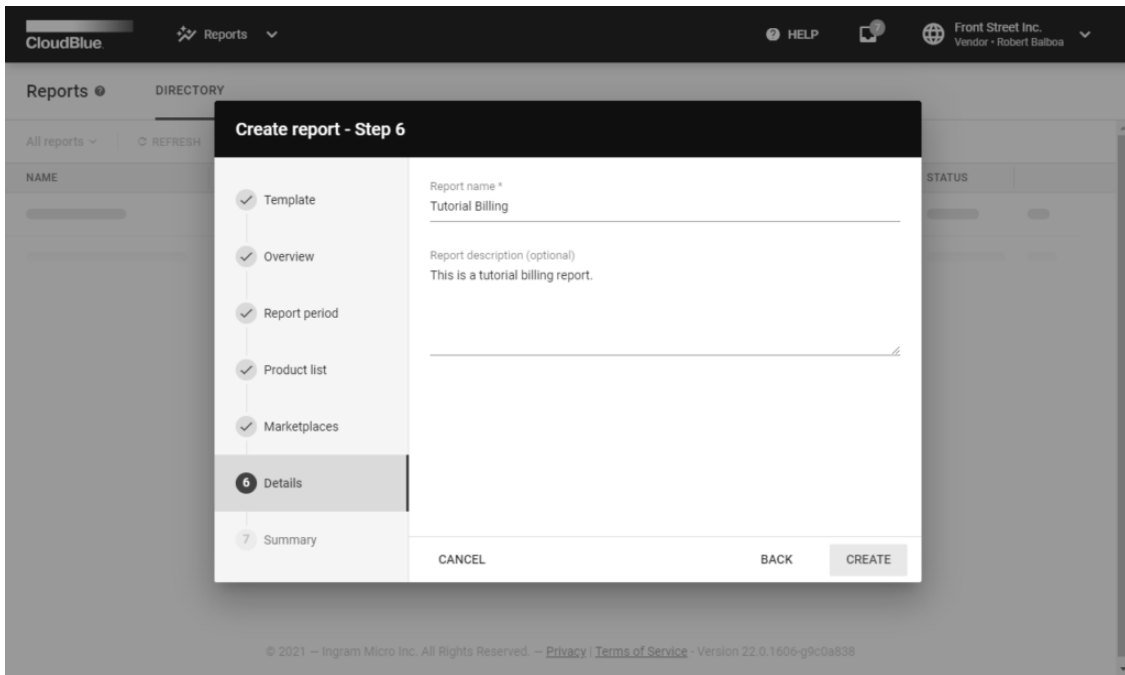


If you want to select all available marketplaces, check the corresponding checkbox.

Details

Specify the following report details:

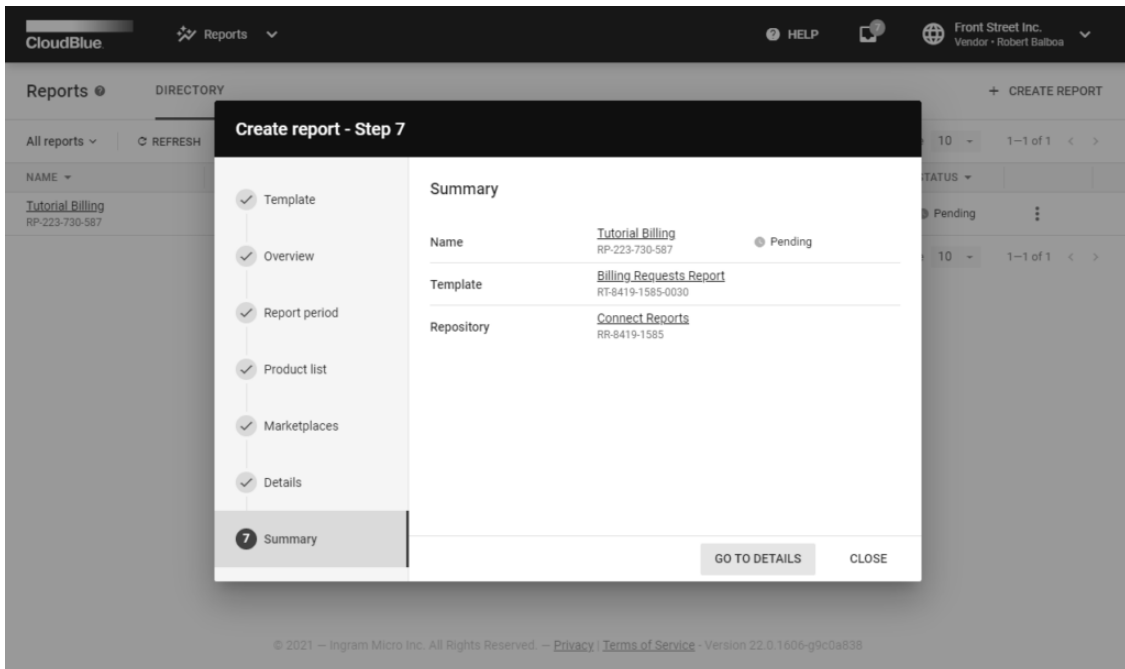
- **Report name:** Enter your report name in this field.
- **Report description:** Provide a description for your report (optional)



Click **Create** to finalize your export request creation.

Summary

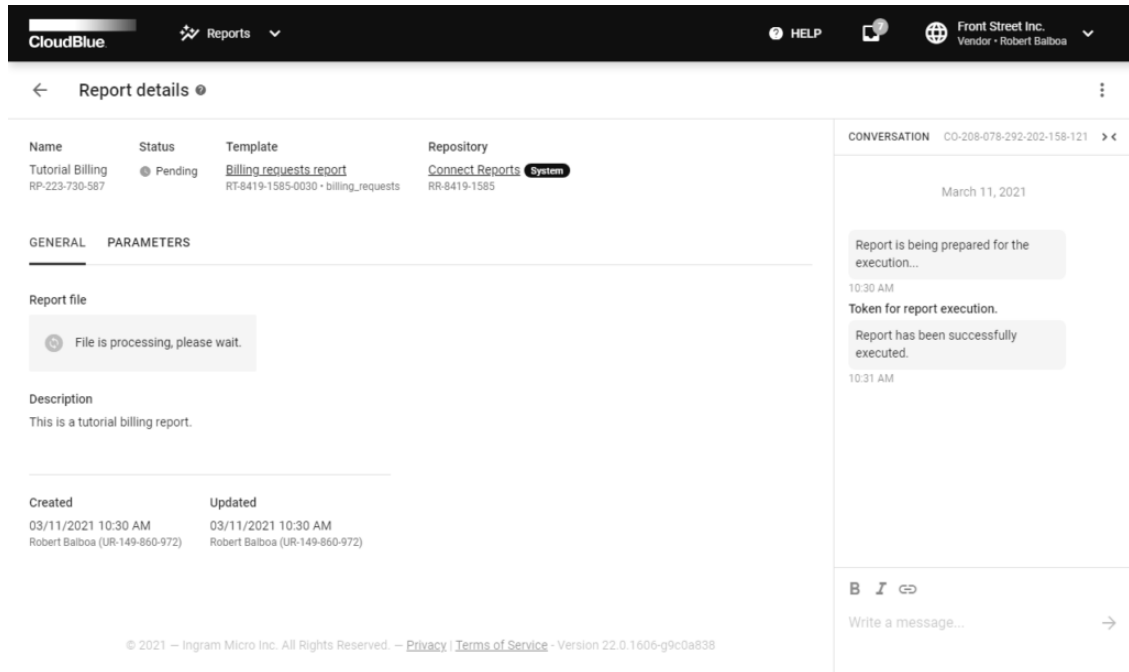
Once your report instance is created, the system provides a summary.



Review the summary and click **Go to Details** to access the Report details screen. Otherwise, click **Close** and return to the Reports module.

Report details

Click on the [report name](#) from the Reports module to access the **Report details** screen.



The screenshot displays the 'Report details' interface. At the top, there's a navigation bar with 'CloudBlue', 'Reports', 'HELP', and user information for 'Front Street Inc. Vendor - Robert Balboa'. Below this, the report details are organized into sections:

- Report Metadata:** A table with columns for Name, Status, Template, and Repository. The data shows 'Tutorial Billing' (RP-223-730-587) with a 'Pending' status, using the 'Billing requests report' template (RT-8419-1585-0030) from the 'Connect Reports' repository (RR-8419-1585), which is a 'System' report type.
- GENERAL / PARAMETERS:** A tabbed interface. The 'GENERAL' tab is active, showing:
 - Report file:** A status box indicating 'File is processing, please wait.'
 - Description:** 'This is a tutorial billing report.'
 - Created/Updated:** Both are '03/11/2021 10:30 AM' by 'Robert Balboa (UR-149-860-972)'.
- CONVERSATION:** A chat window for 'CO-208-078-292-202-158-121' dated 'March 11, 2021'. It contains three messages:
 - 10:30 AM: 'Report is being prepared for the execution...'
 - 10:31 AM: 'Token for report execution.'
 - 10:31 AM: 'Report has been successfully executed.'

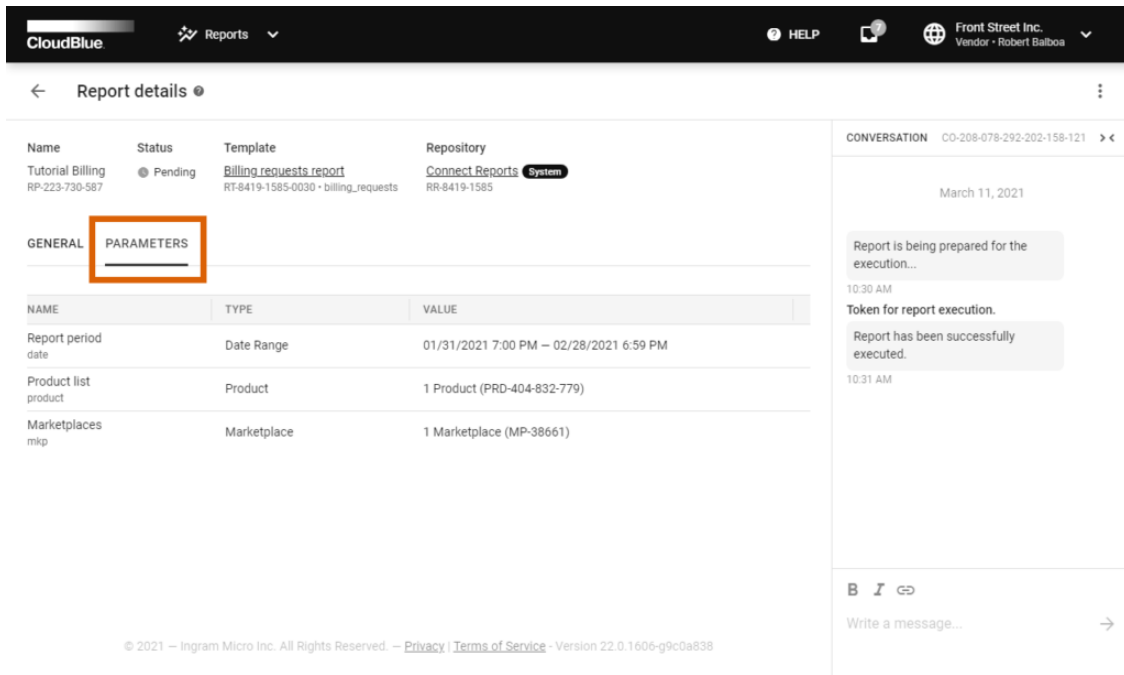
At the bottom, there's a footer with copyright information: '© 2021 - Ingram Micro Inc. All Rights Reserved. - Privacy | Terms of Service - Version 22.0.1606-g9c0a838'.

The **Report details** screen contains your report instance data. Namely, provided **Name**, specified **Description**, selected **Template**, associated **Dates**, report **Status**, file **Repository** and report type (**System** or **Custom**).

Furthermore, you can use the **Conversation** field to leave a message for your account users or to examine the system messages.

Once the system will successfully process a report file, it will be available for download under **Report file**.

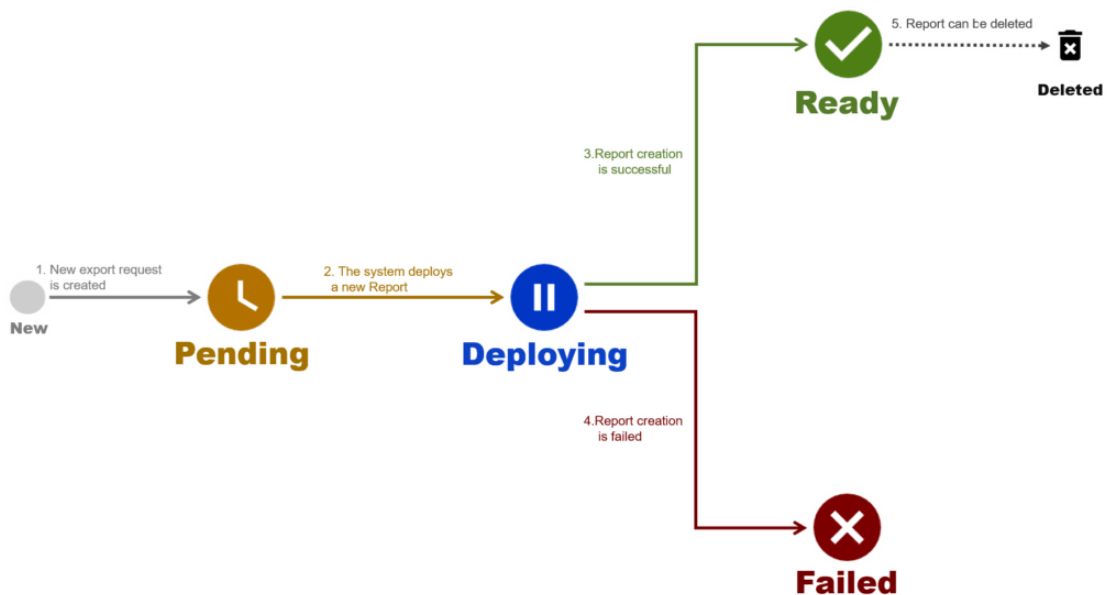
Click on the **Parameters** tab to access your specified parameters.



Note that provided parameters vary depending on the selected report template.

Report statuses

The following introduces, illustrates and describes all available report states on the Connect platform.



Pending: This state indicates that an export request is successfully submitted. Furthermore, this status indicates that the system starts generating a new report.

Deploying: This status indicates that a new report is being deployed on the Connect platform. From this particular state, the

system decides if a report file is generated successfully. Thereafter, in case the report creation is successful, the system assigns the *Ready* status to this report. Otherwise, the report creation is failed and the system assigns the corresponding status to it.

Ready: This status is displayed in case the report creation process was successfully completed. Therefore, your report file is ready and it is available to download.

Failed: This state is displayed in case the report creation process is failed due to an error. Therefore, this report will not be available for download. Note that Failed status represents a terminal state, meaning no further actions with this report are required or available.

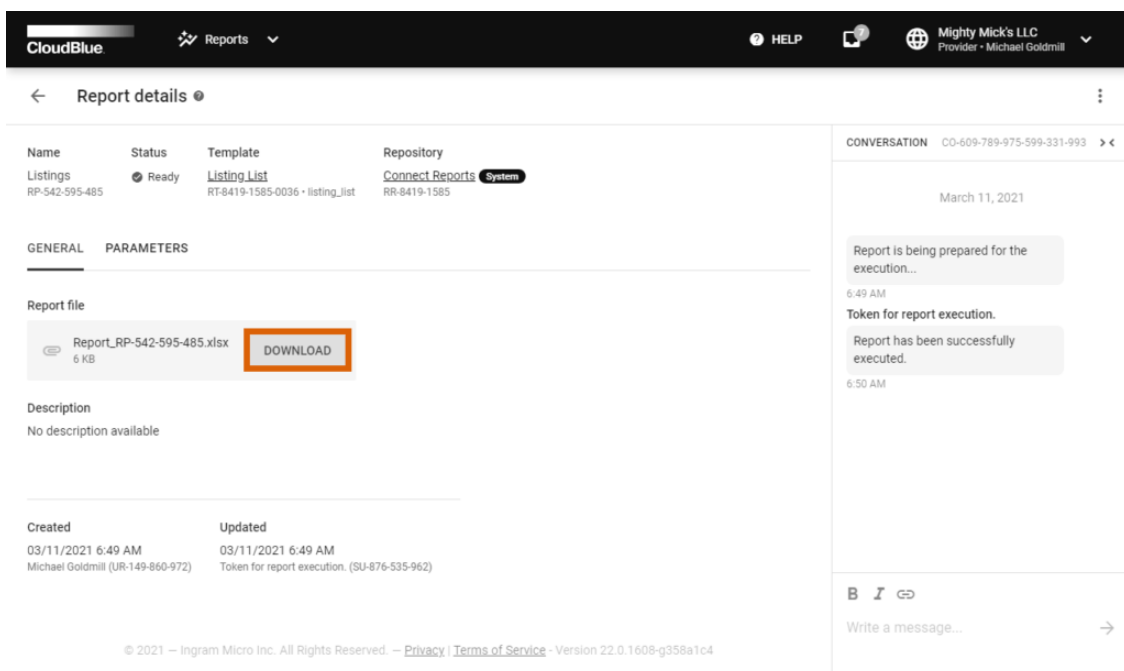
Downloading Report Files

Download your report file from the **Report details** screen.

Make sure that your report status displays “**Ready**”. Thereafter, click the **Download** button to successfully download your report file.

Information

Note that the system generates report files in the **XLSX** format.



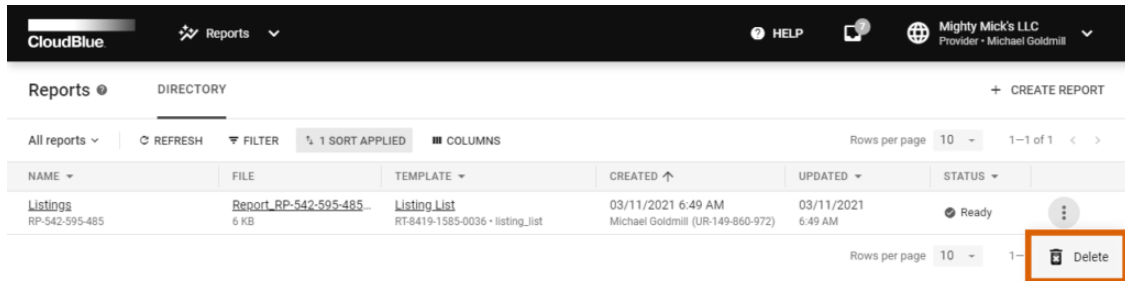
Deleting Reports

Locate a report that you want to delete within the **Reports** module. Click the vertical ellipsis (**⋮**) button next to your selected report. Thereafter, click the **Delete** button to delete your report.



Warning

Once your report is deleted, it cannot be restored.



The screenshot shows the CloudBlue Reports module interface. At the top, there is a navigation bar with the CloudBlue logo, a 'Reports' dropdown menu, and user information for 'Mighty Mick's LLC' (Provider: Michael Goldmill). Below the navigation bar, the 'Reports' section is active, showing a 'DIRECTORY' view. A table lists reports with columns for NAME, FILE, TEMPLATE, CREATED, UPDATED, and STATUS. The first row shows a report named 'Listings' (RP-542-595-485) with a file named 'Report_RP-542-595-485' (6 KB) and a template named 'Listing_List'. The report is in a 'Ready' status. A vertical ellipsis menu icon is visible next to the report, and a 'Delete' button is highlighted with a red box.

NAME	FILE	TEMPLATE	CREATED	UPDATED	STATUS
Listings RP-542-595-485	Report_RP-542-595-485 6 KB	Listing_List RT-8419-1585-0036 • listing_list	03/11/2021 6:49 AM Michael Goldmill (UR-149-860-972)	03/11/2021 6:49 AM	Ready