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Documentation Modules Reports

Custom Report Instructions

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CloudBlue Connect allows creating reports based on your custom templates. Such templates should be created by following the Connect Reports SDK guidelines. It is required to upload custom templates to a Git repository and assign a specific release tag. Thereafter, your repository can be linked with the system via the Reports section of the Account module.

The following showcases how to prepare your template files and provides step-by-step instructions on how to prepare your Git repository, how to add your Git repository to Connect, and how to successfully generate a report by using a custom template.

Preparing Template Files

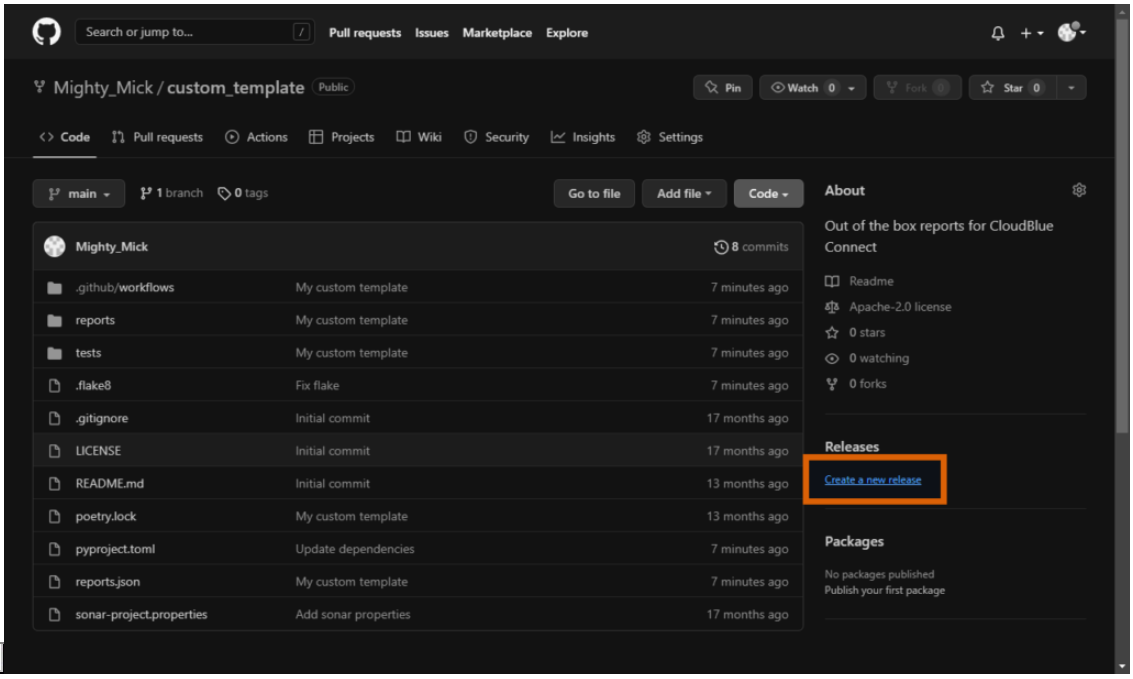
Follow the Connect Reports SDK guidelines to successfully create your custom report template. Namely, prepare your report template by following the provided steps:

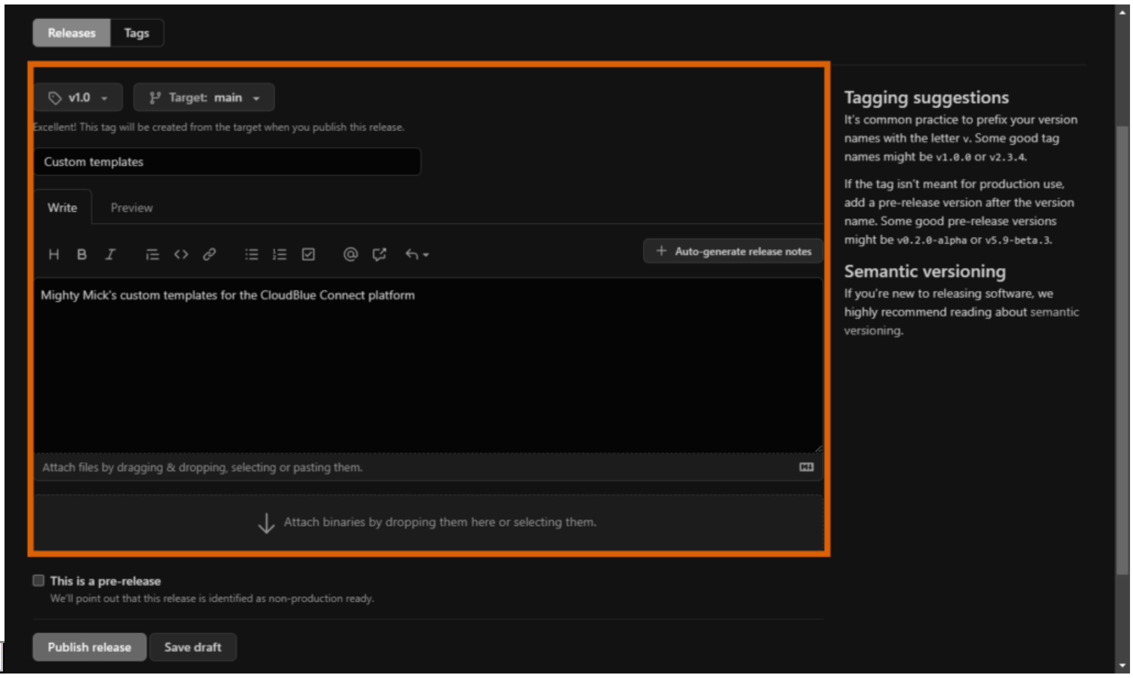
1. First, report template files should be generated by using the provided Cookiecutter framework.
2. Your **report.json** file should contain required report template parameters. Refer to the Report Parameters table for more details.
3. The **entrypoint.py** file should contain your *report generate* code. Use the RQL client or string concatenation to successfully prepare your entrypoint file.
4. When all required data is presented, you can generate your report template by executing the corresponding command via Connect CLI.

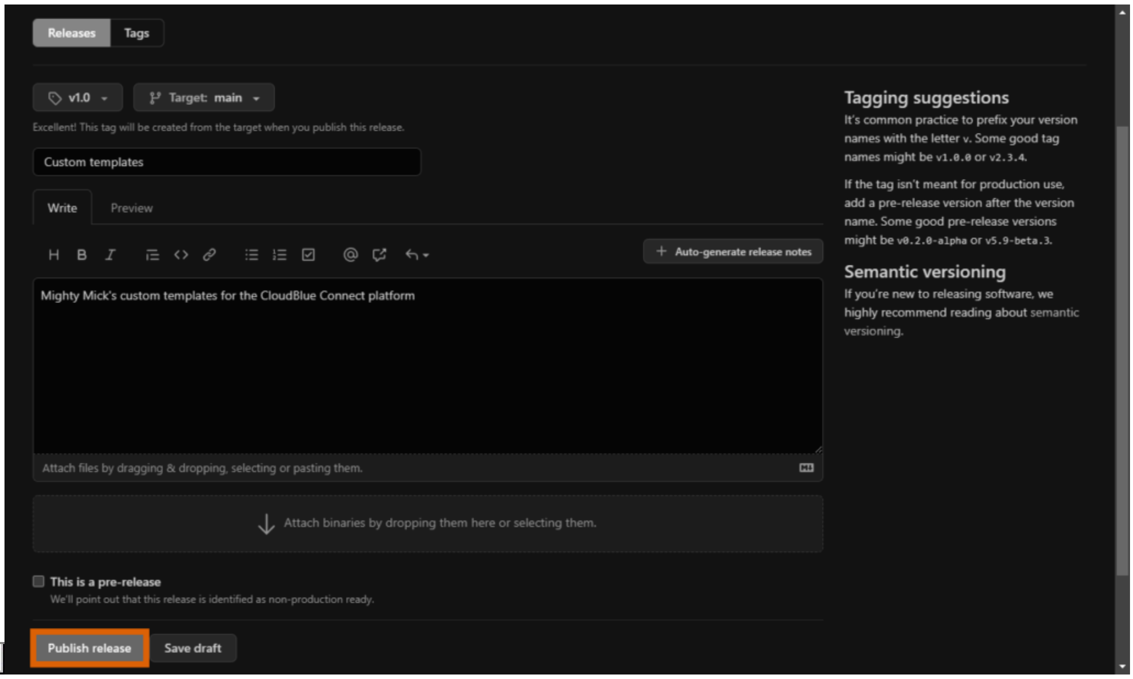
Therefore, in case your report template is generated successfully, you can upload your report template files to your Git repository. Note that in order to use your custom templates on the Connect platform, your repository should have a version tag. Prepare your Git repository as described below.

Preparing Repository

Before adding your Git repository to Connect and starting to use your custom template within the system, it is required to make sure that your repository includes at least one version tag. Otherwise, your repository will not be added to the system. The following steps demonstrate how to create a new release and prepare your repository on GitHub:


Search or jump to...
Pull requests
Issues
Marketplace
Explore
Mighty_Mick / custom_template
Public
Pin
Watch 0
Fork 0
Star 0
Code
Pull requests
Actions
Projects
Wiki
Security
Insights
Settings
main
1 branch
0 tags
Go to file
Add file
Code
Mighty_Mick
8 commits
.github/workflows My custom template 7 minutes ago
reports My custom template 7 minutes ago
tests My custom template 7 minutes ago
.flake8 Fix flake 7 minutes ago
.gitignore Initial commit 17 months ago
LICENSE Initial commit 17 months ago
README.md Initial commit 13 months ago
poetry.lock My custom template 13 months ago
pyproject.toml Update dependencies 7 minutes ago
reports.json My custom template 7 minutes ago
sonar-project.properties Add sonar properties 17 months ago
About
Out of the box reports for CloudBlue Connect
Readme
Apache-2.0 license
0 stars
0 watching
0 forks
Releases
Create a new release
Packages
No packages published
Publish your first package


Releases
Tags
v1.0
Target: main
Excellent! This tag will be created from the target when you publish this release.
Custom templates
Write
Preview
Auto-generate release notes
Mighty Mick's custom templates for the CloudBlue Connect platform
Attach files by dragging & dropping, selecting or pasting them.
Attach binaries by dropping them here or selecting them.
This is a pre-release
We'll point out that this release is identified as non-production ready.
Publish release
Save draft
Tagging suggestions
It's common practice to prefix your version names with the letter v. Some good tag names might be v1.0.0 or v2.3.4.
If the tag isn't meant for production use, add a pre-release version after the version name. Some good pre-release versions might be v0.2.0-alpha or v5.9-beta.3.
Semantic versioning
If you're new to releasing software, we highly recommend reading about semantic versioning.



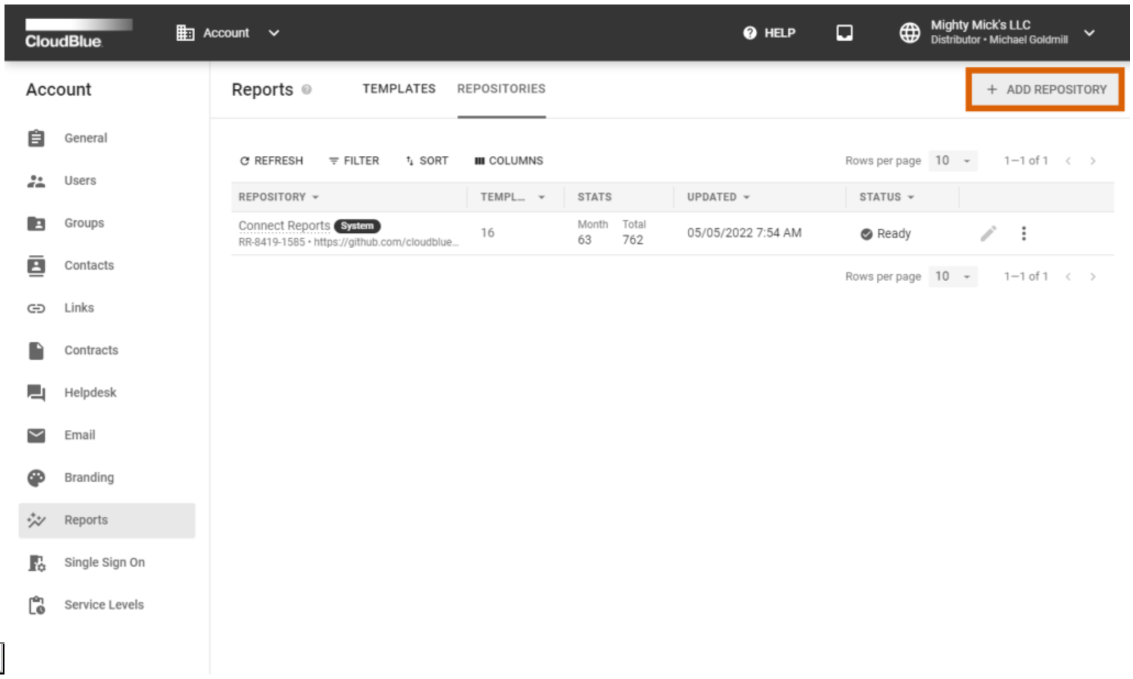
1. Click **Create a new release** from your repository with a custom template.
2. Use the following form to define your release:
   - *Select Tag*: It is recommended to use a version tag with the *v* prefix (e.g., *v1.0.0* or *v0.2.3*)
   - *Release title*: Enter any title for your release.
   - *Description*: Provide description for your new release.
3. Publish your release by using the corresponding button on the interface.

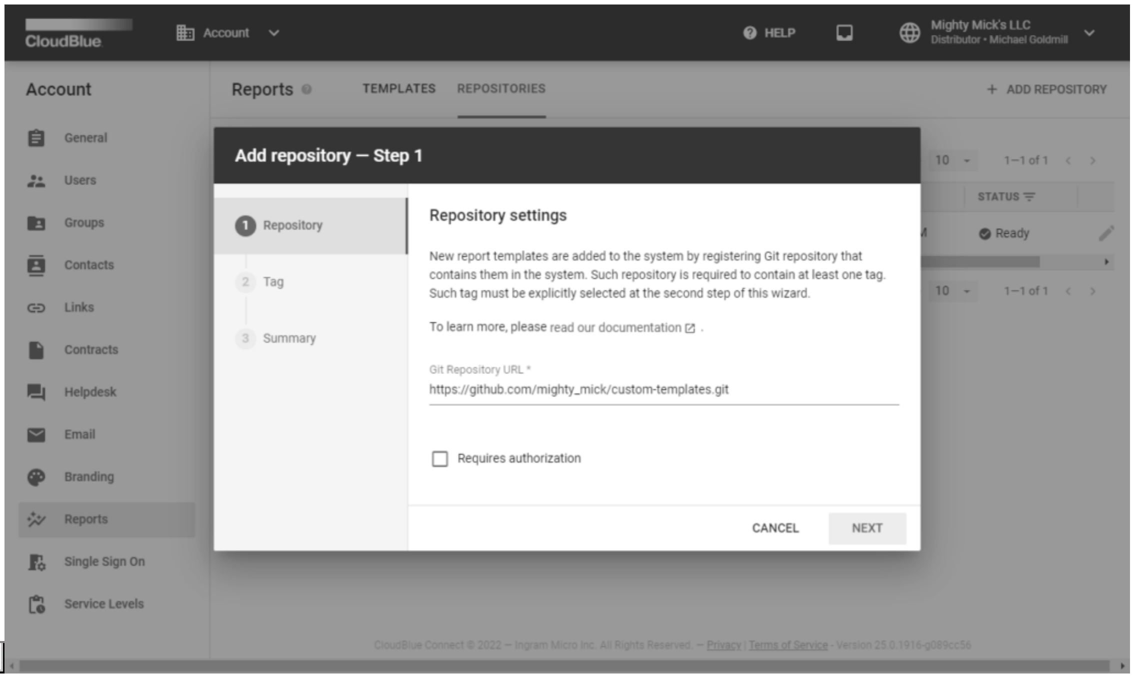
Thus, a new version tag of your custom template will be created and your repository will be successfully configured for the following operations. In case more information on managing your releases is required, please refer to the GitHub documentation.

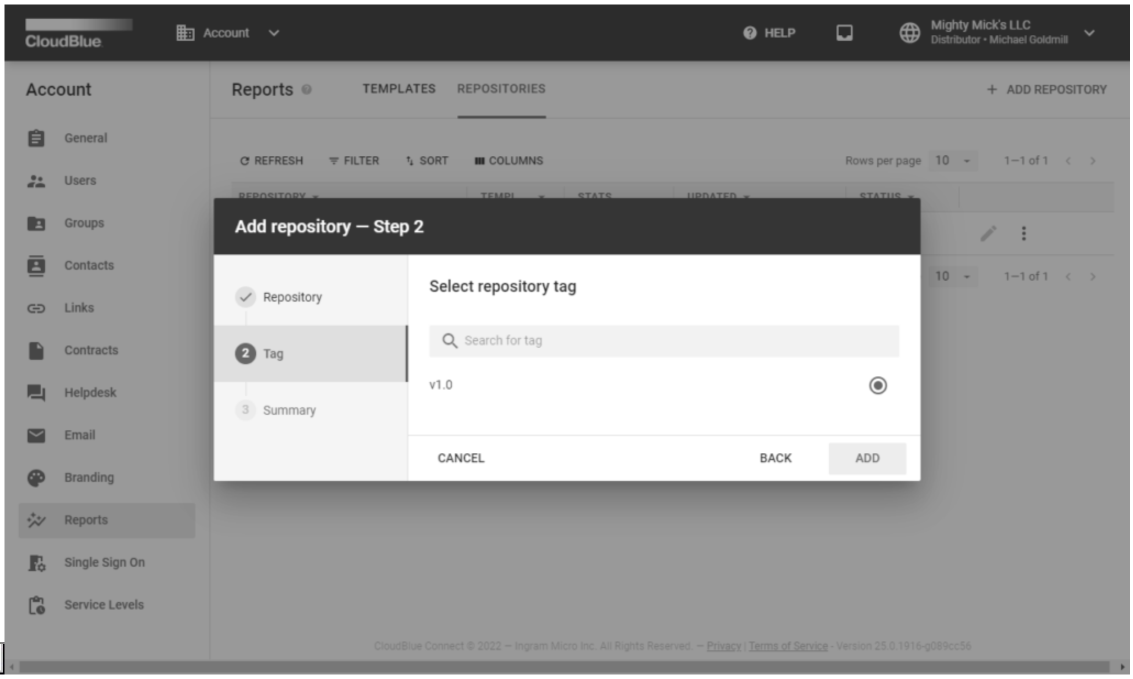
Adding Repository

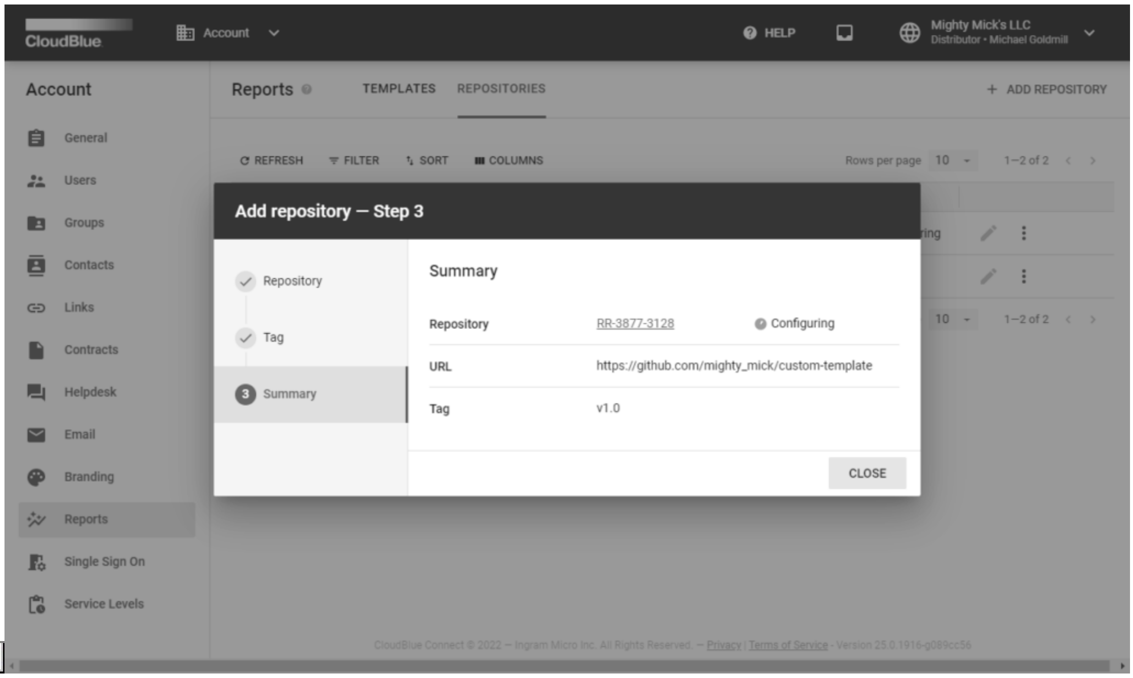
Once your Git repository includes at least one release with your custom templates and a version tag, it is possible to add this repository to the Connect platform. Navigate through the *Accounts* module on Connect and access the *Reports* section that provides available templates and repositories. Switch to the *Repositories* tab and click **Add Repository** to launch a wizard.

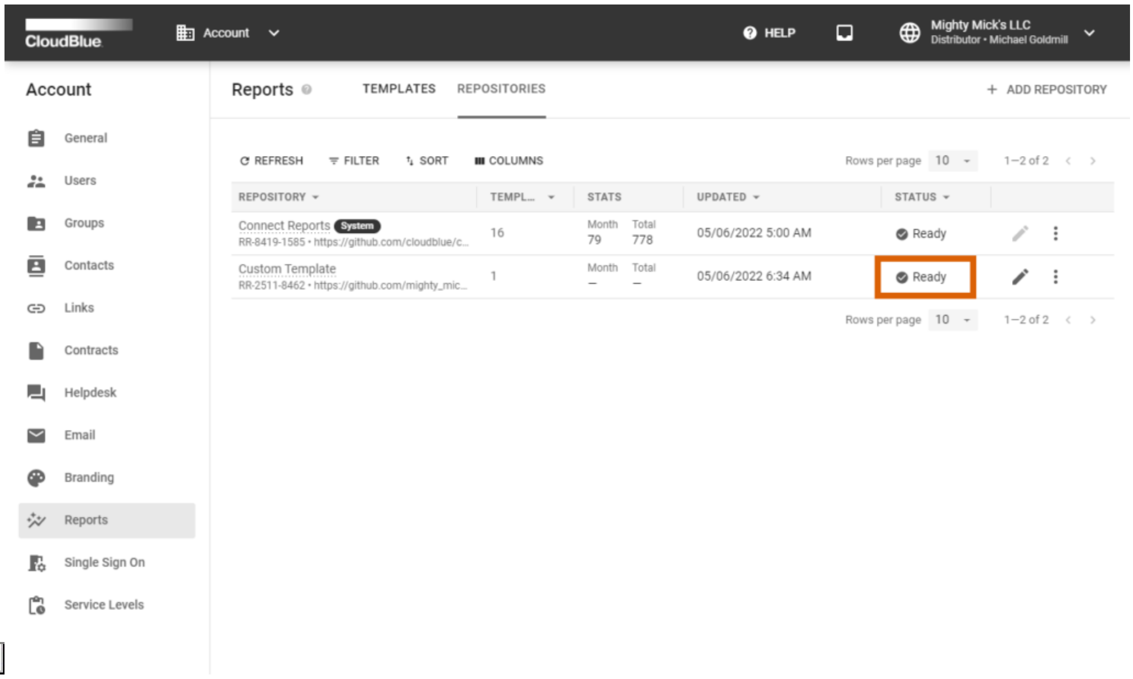
Follow the wizard steps to add your Git repository to the system:


CloudBlue
Account
HELP
Mighty Mick's LLC
Distributor • Michael Goldmill
Account
Reports
TEMPLATES
REPOSITORIES
+ ADD REPOSITORY
General
Users
Groups
Contacts
Links
Contracts
Helpdesk
Email
Branding
Reports
Single Sign On
Service Levels
REFRESH
FILTER
SORT
COLUMNS
Rows per page 10
1–1 of 1
REPOSITORY
TEMPL...
STATS
UPDATED
STATUS
Connect Reports System
RR-8419-1585 • https://github.com/cloudblue...
16
Month 63
Total 762
05/05/2022 7:54 AM
Ready


CloudBlue
Account
HELP
Mighty Mick's LLC
Distributor • Michael Goldmill
Account
Reports
TEMPLATES
REPOSITORIES
+ ADD REPOSITORY
General
Users
Groups
Contacts
Links
Contracts
Helpdesk
Email
Branding
Reports
Single Sign On
Service Levels
Add repository — Step 1
1 Repository
2 Tag
3 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/mighty_mick/custom-templates.git
Requires authorization
CANCEL
NEXT
STATUS
Ready


CloudBlue
Account
HELP
Mighty Mick's LLC
Distributor • Michael Goldmill
Account
General
Users
Groups
Contacts
Links
Contracts
Helpdesk
Email
Branding
Reports
Single Sign On
Service Levels
Reports
TEMPLATES
REPOSITORIES
ADD REPOSITORY
REFRESH
FILTER
SORT
COLUMNS
Rows per page
10
1–1 of 1
Add repository — Step 2
Repository
Tag
Summary
Select repository tag
Search for tag
v1.0
CANCEL
BACK
ADD


CloudBlue
Account
HELP
Mighty Mick's LLC
Distributor • Michael Goldmill
Account
General
Users
Groups
Contacts
Links
Contracts
Helpdesk
Email
Branding
Reports
Single Sign On
Service Levels
Reports
TEMPLATES
REPOSITORIES
ADD REPOSITORY
REFRESH
FILTER
SORT
COLUMNS
Rows per page
10
1–2 of 2
Add repository — Step 3
Repository
Tag
Summary
Summary
Repository
RR-3877-3128
Configuring
URL
https://github.com/mighty_mick/custom-template
Tag
v1.0
CLOSE



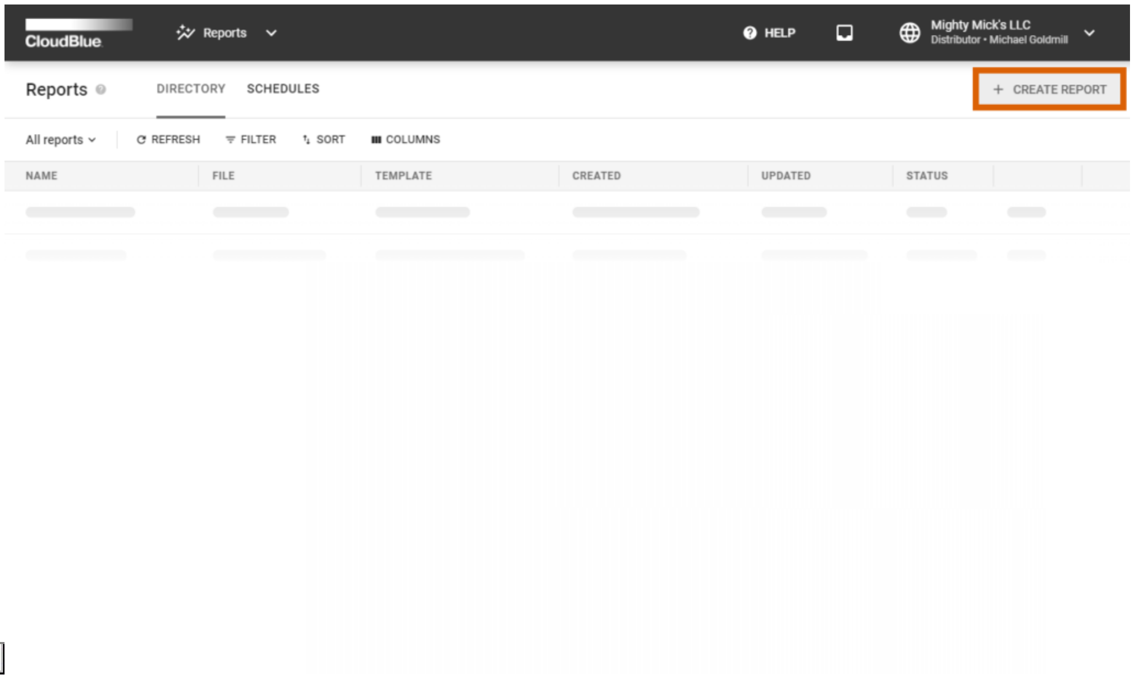
1. Provide your repository link to the *Git Repository URL* input field. In case your repository requires authorization, check the *Requires Authorization* checkbox to specify your username and password.
2. Select a version tag in the following form. If the system does not provide any tags, make sure that your repository includes a version tag as described above.
3. Click the **Add** button to finalize your repository configuration on Connect.

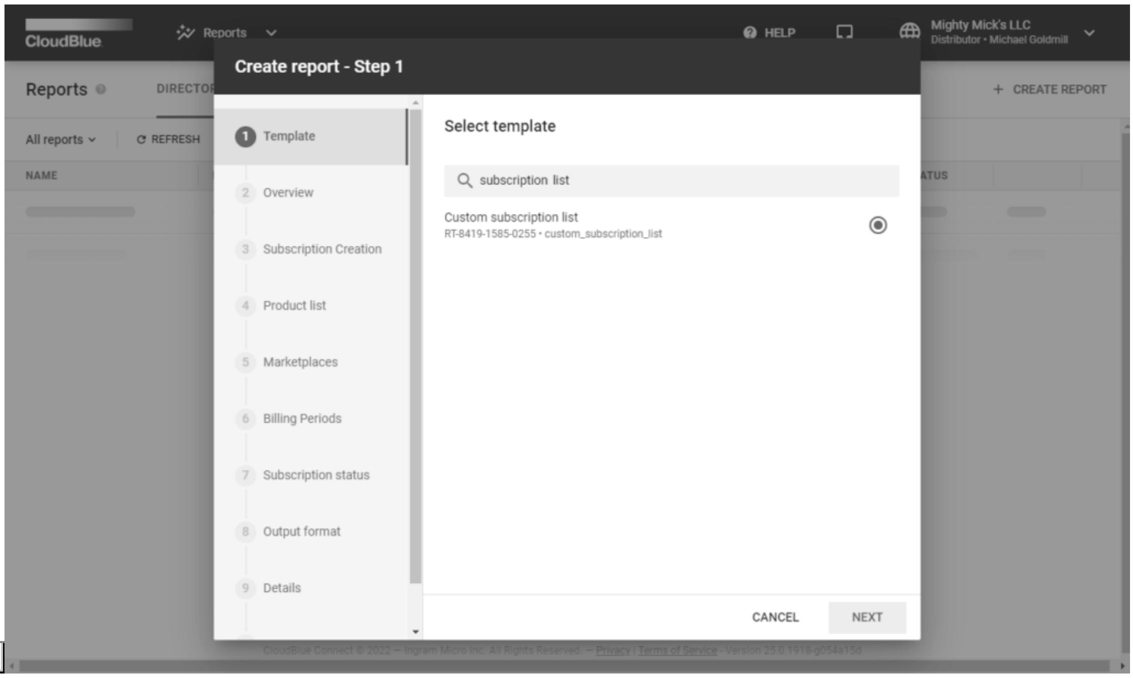
Therefore, the system starts adding your Git repository. Note that the system provides a status of your repository. Once the status of your repository object is switched to *Ready*, the system will successfully add your custom templates and will allow generating reports by using these templates. In case of an error, the system provides an error description within your repository details and conversation box.

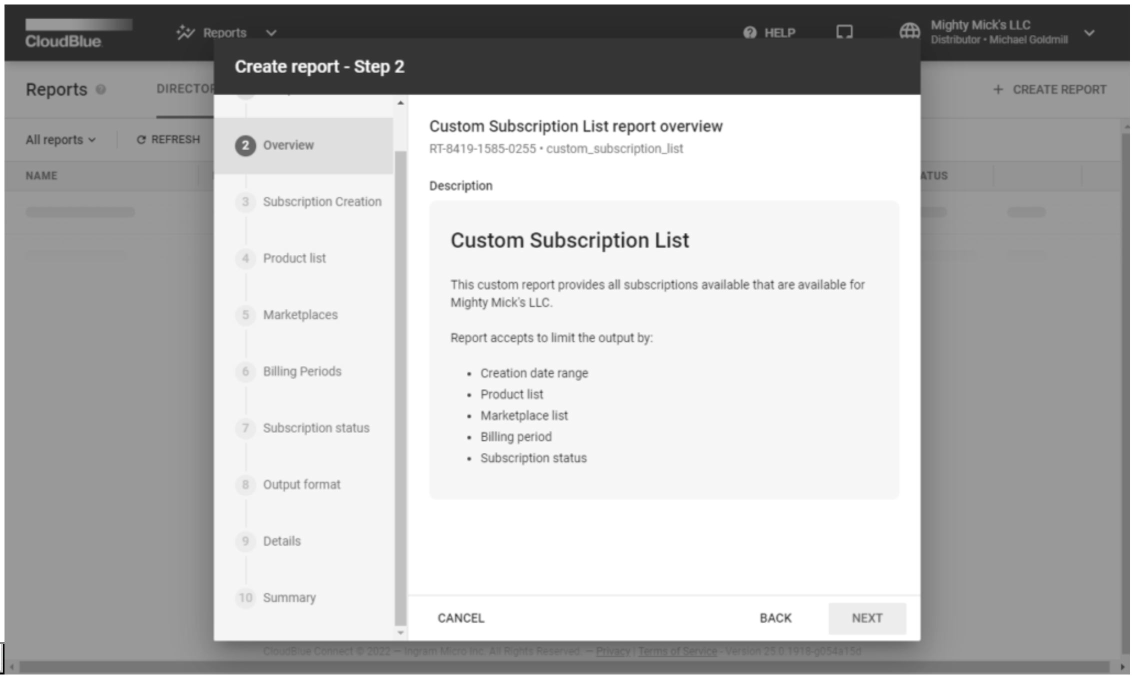
Generating Custom Reports

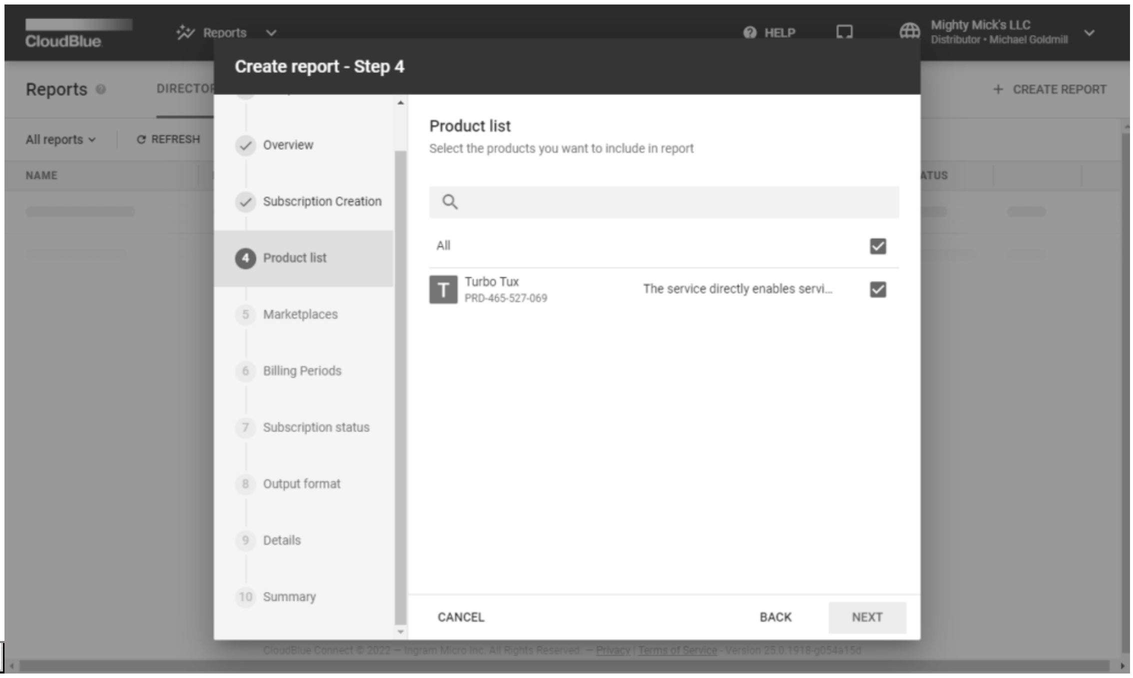
When your custom reports are successfully uploaded to Connect, the system allows generating reports by using the reports creation wizard in the Reports module. Note that the number of wizard steps vary depending on your created template.

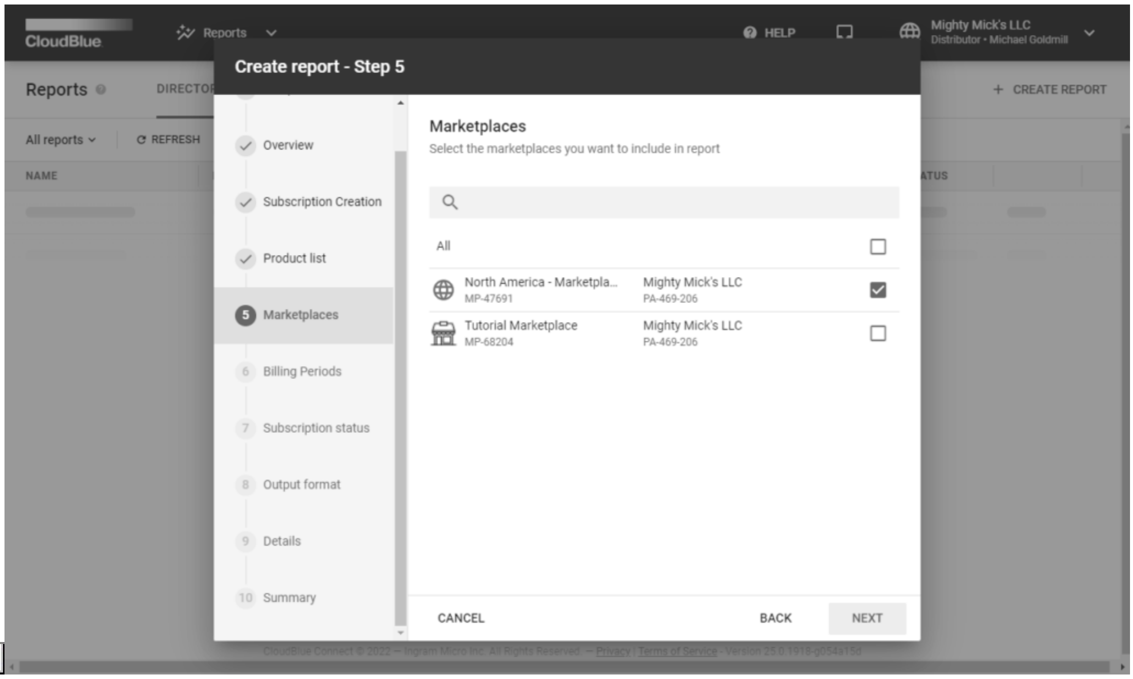
The following showcases how to create a new Connect report based on a custom template:

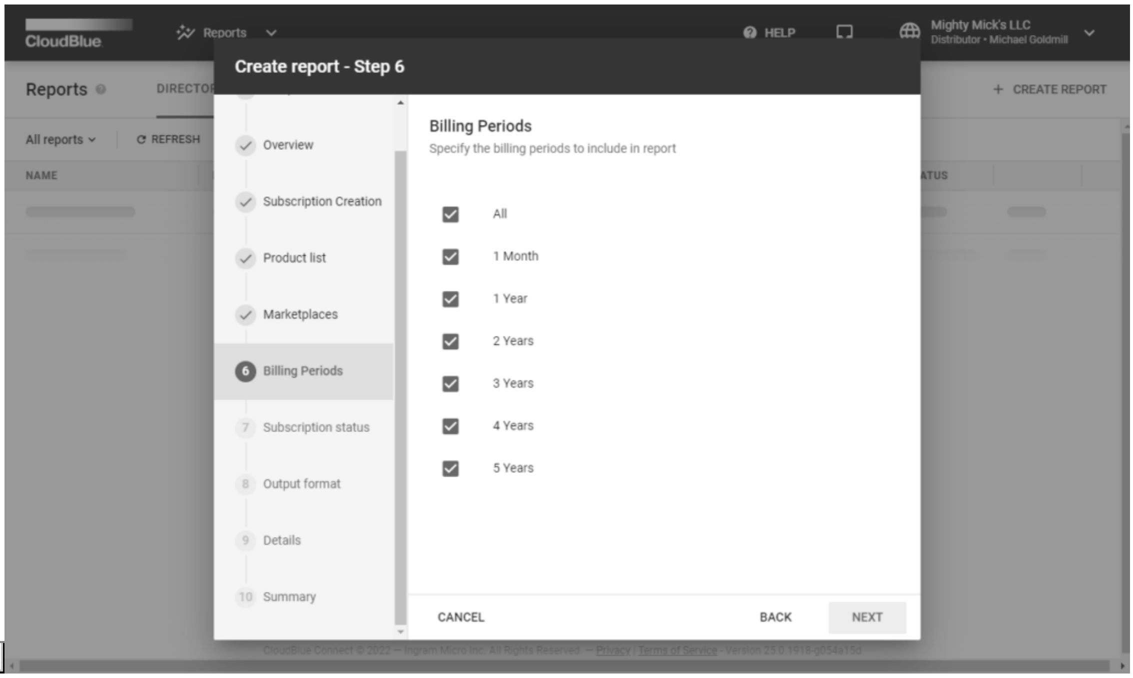

CloudBlue
Reports
HELP
Mighty Mick's LLC
Distributor • Michael Goldmill
Reports
DIRECTORY
SCHEDULES
+ CREATE REPORT
All reports
REFRESH
FILTER
SORT
COLUMNS
NAME
FILE
TEMPLATE
CREATED
UPDATED
STATUS

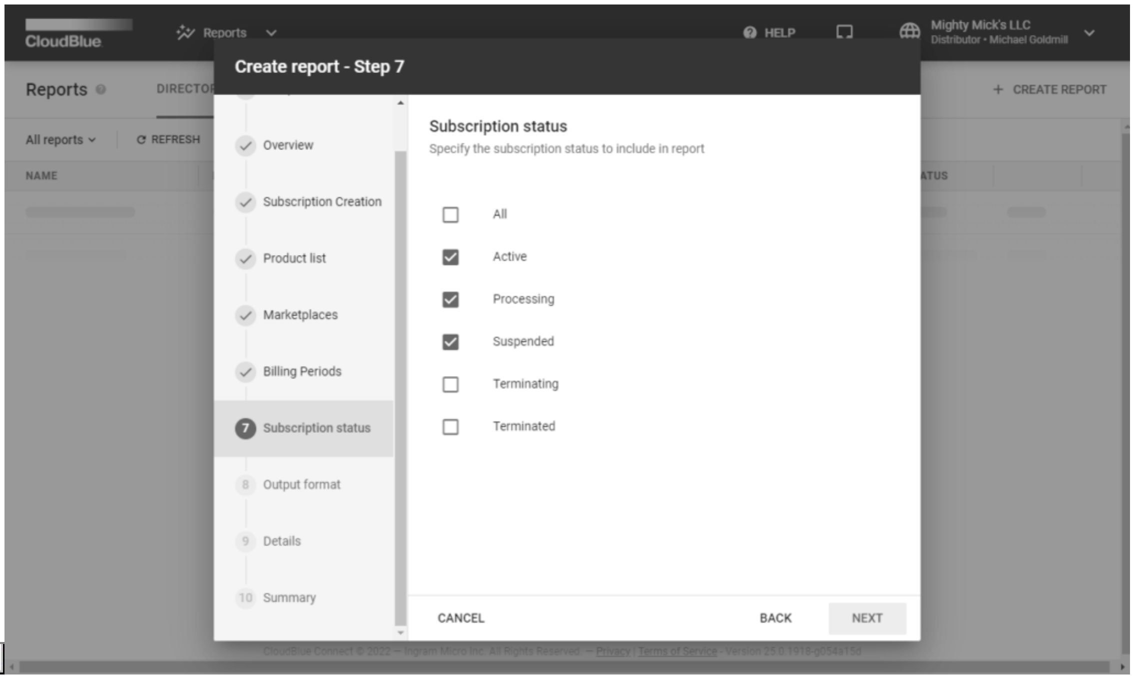

CloudBlue
Reports
HELP
Mighty Mick's LLC
Distributor • Michael Goldmill
Reports
+ CREATE REPORT
All reports
REFRESH
NAME
Create report - Step 1
1 Template
2 Overview
3 Subscription Creation
4 Product list
5 Marketplaces
6 Billing Periods
7 Subscription status
8 Output format
9 Details
Select template
subscription list
Custom subscription list
RT-8419-1585-0255 • custom_subscription_list
CANCEL
NEXT

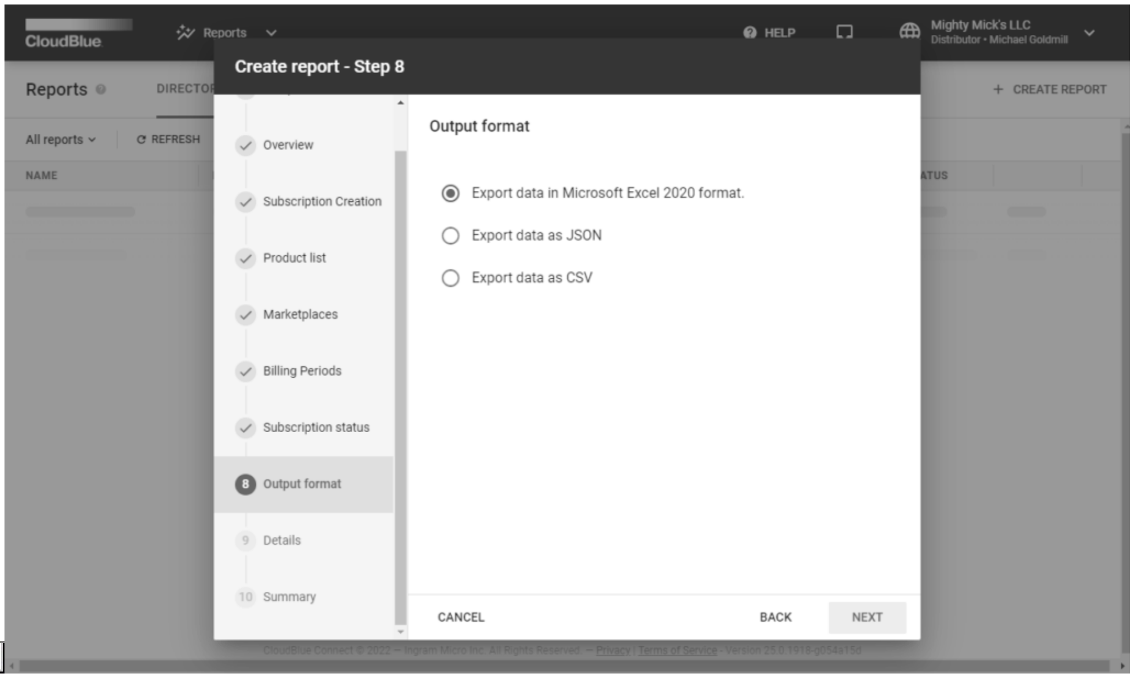

CloudBlue
Reports
HELP
Mighty Mick's LLC
Distributor • Michael Goldmill
Reports
DIRECTOR
CREATE REPORT
All reports
REFRESH
NAME
ATUS
Create report - Step 2
2 Overview
3 Subscription Creation
4 Product list
5 Marketplaces
6 Billing Periods
7 Subscription status
8 Output format
9 Details
10 Summary
Custom Subscription List report overview
RT-8419-1585-0255 • custom_subscription_list
Description
Custom Subscription List
This custom report provides all subscriptions available that are available for Mighty Mick's LLC.
Report accepts to limit the output by:
Creation date range
Product list
Marketplace list
Billing period
Subscription status
CANCEL
BACK
NEXT

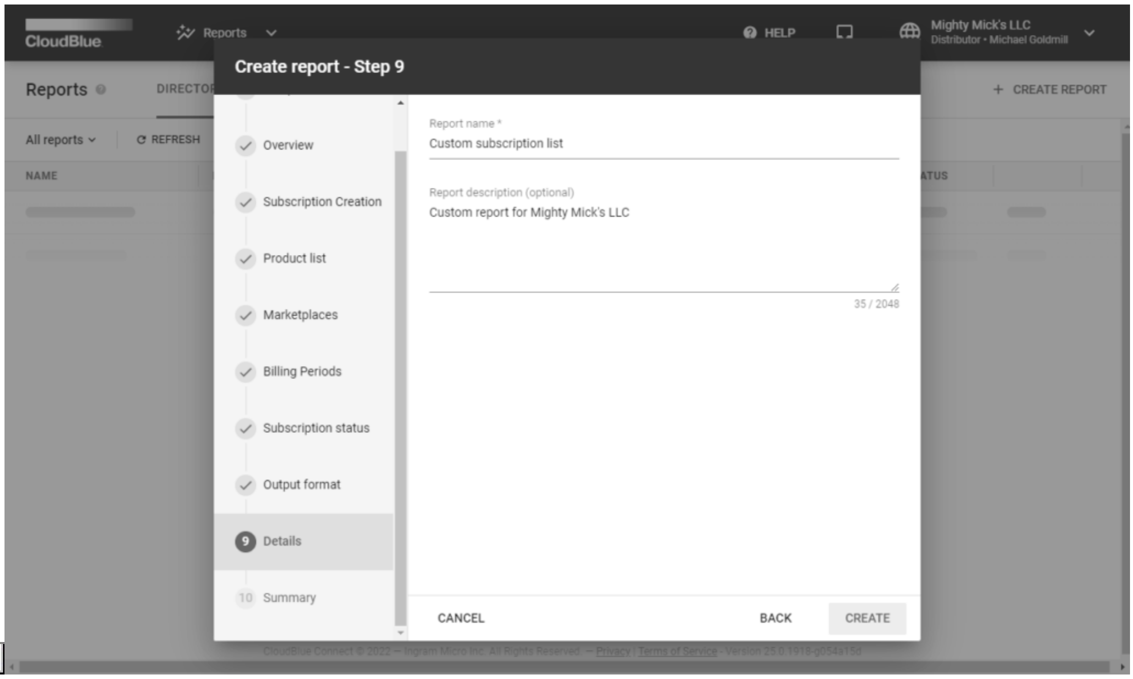

CloudBlue
Reports
HELP
Mighty Mick's LLC
Distributor • Michael Goldmill
Reports
DIRECTOR
CREATE REPORT
All reports
REFRESH
NAME
ATUS
Create report - Step 4
Overview
Subscription Creation
4 Product list
5 Marketplaces
6 Billing Periods
7 Subscription status
8 Output format
9 Details
10 Summary
Product list
Select the products you want to include in report
All
Turbo Tux
PRD-465-527-069
The service directly enables servi...
CANCEL
BACK
NEXT

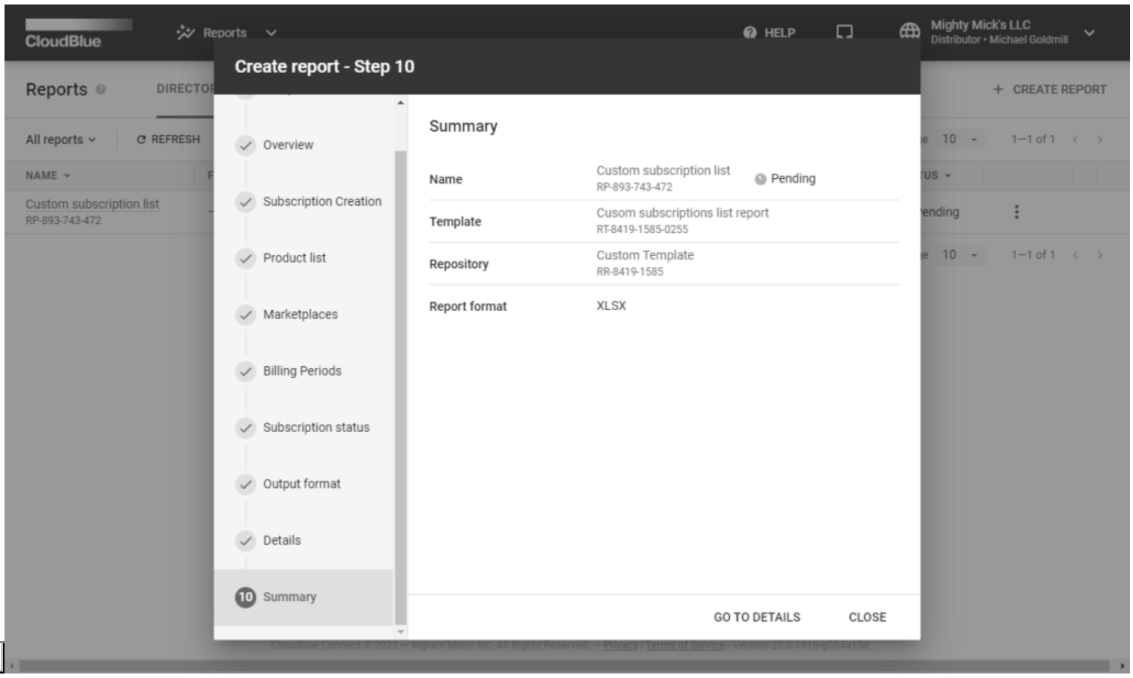

CloudBlue
Reports
HELP
Mighty Mick's LLC
Distributor • Michael Goldmill
Reports
DIRECTOR
CREATE REPORT
All reports
REFRESH
NAME
ATUS
Create report - Step 5
Overview
Subscription Creation
Product list
5 Marketplaces
6 Billing Periods
7 Subscription status
8 Output format
9 Details
10 Summary
Marketplaces
Select the marketplaces you want to include in report
All
North America - Marketpla...
MP-47691
Mighty Mick's LLC
PA-469-206
Tutorial Marketplace
MP-68204
Mighty Mick's LLC
PA-469-206
CANCEL
BACK
NEXT

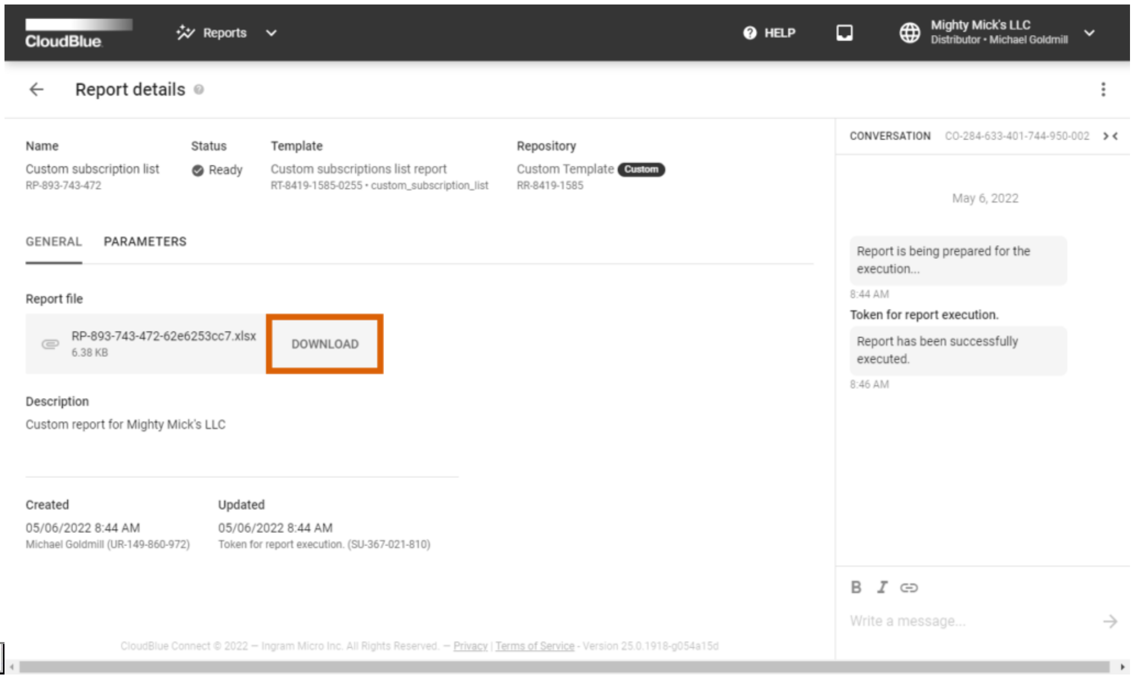

CloudBlue
Reports
HELP
Mighty Mick's LLC
Distributor • Michael Goldmill
Reports
DIRECTOR
CREATE REPORT
All reports
REFRESH
NAME
ATUS
Create report - Step 6
Overview
Subscription Creation
Product list
Marketplaces
6 Billing Periods
7 Subscription status
8 Output format
9 Details
10 Summary
Billing Periods
Specify the billing periods to include in report
All
1 Month
1 Year
2 Years
3 Years
4 Years
5 Years
CANCEL
BACK
NEXT


CloudBlue
Reports
HELP
Mighty Mick's LLC
Distributor • Michael Goldmill
Reports
DIRECTOR
CREATE REPORT
All reports
REFRESH
NAME
Create report - Step 7
Overview
Subscription Creation
Product list
Marketplaces
Billing Periods
Subscription status
Output format
Details
Summary
Subscription status
Specify the subscription status to include in report
All
Active
Processing
Suspended
Terminating
Terminated
CANCEL
BACK
NEXT


CloudBlue
Reports
HELP
Mighty Mick's LLC
Distributor • Michael Goldmill
Reports
DIRECTOR
CREATE REPORT
All reports
REFRESH
NAME
Create report - Step 8
Overview
Subscription Creation
Product list
Marketplaces
Billing Periods
Subscription status
Output format
Details
Summary
Output format
Export data in Microsoft Excel 2020 format.
Export data as JSON
Export data as CSV
CANCEL
BACK
NEXT


CloudBlue
Reports
HELP
Mighty Mick's LLC
Distributor • Michael Goldmill
Create report - Step 9
Reports
DIRECTOR
CREATE REPORT
All reports
REFRESH
NAME
ATUS
Overview
Subscription Creation
Product list
Marketplaces
Billing Periods
Subscription status
Output format
9 Details
10 Summary
Report name *
Custom subscription list
Report description (optional)
Custom report for Mighty Mick's LLC
35 / 2048
CANCEL
BACK
CREATE


CloudBlue
Reports
HELP
Mighty Mick's LLC
Distributor • Michael Goldmill
Create report - Step 10
Reports
DIRECTOR
CREATE REPORT
All reports
REFRESH
NAME
Custom subscription list
RP-893-743-472
Overview
Subscription Creation
Product list
Marketplaces
Billing Periods
Subscription status
Output format
Details
10 Summary
Summary
Name
Custom subscription list
RP-893-743-472
Pending
Template
Cusom subscriptions list report
RT-8419-1585-0255
Repository
Custom Template
RR-8419-1585
Report format
XLSX
GO TO DETAILS
CLOSE



1. Launch the aforementioned wizard by clicking the **Create Report** button from the *Reports* module.
2. Select your custom template on the first wizard step. Use the the search input to locate your uploaded template faster.
3. Next, the wizard provides your created overview and your defined configuration options on the following steps. Keep providing configuration specifications as it is required for your report.
4. Once all of your custom report template options are specified, the wizard asks to select an output for your report. It is possible to generate a report in XLSX, JSON, or CSV format.
5. When the wizard asks to specify your report details, it is required to provide a name for your report object on Connect. It is also possible to specify your report description if necessary.
6. Finalize your report creation by clicking the **Create** button.

As a result, the system generates a new custom report object and assigns *the Pending* status to this object. Once the status of your report object will be switched to *Ready*, the system allows downloading the report file by clicking on your file from the *Reports* data grid and by using the **Download** button from the *Report details* screen.

Note that the system also allows using your custom templates to configure schedules for your reports creation. Refer to Reports Interface documentation for more details.