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Reports Interface



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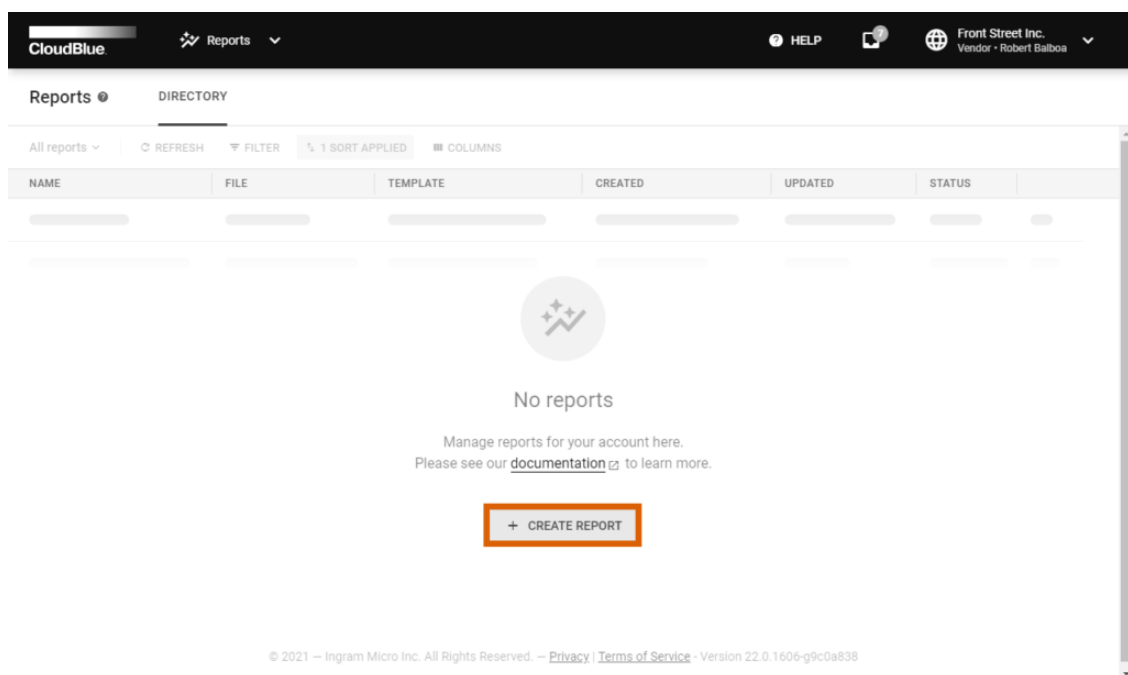
Auto-generated at June 25, 2022

The following provides instructions on how to generate and configure report files. Furthermore, the following guidelines showcase how to schedule your report creation and how to download generated report files.

Report Creation

The **Directory** tab of the **Reports** module is used to generate reports only once. The CloudBlue Connect platform provides a wizard that facilitates and streamlines the report creation procedure. This wizard provides a set of default system templates as well as your custom templates configured via the Reports SDK.

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



Follow the wizard instructions to successfully create a report on the Connect platform.

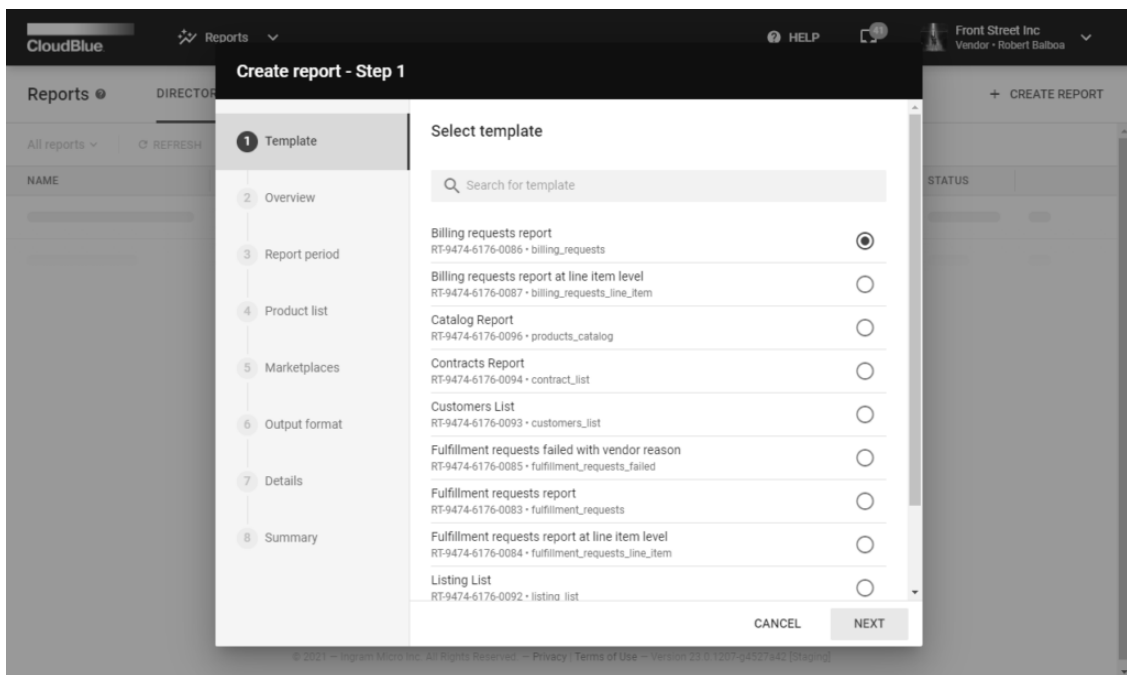
Template

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



Information

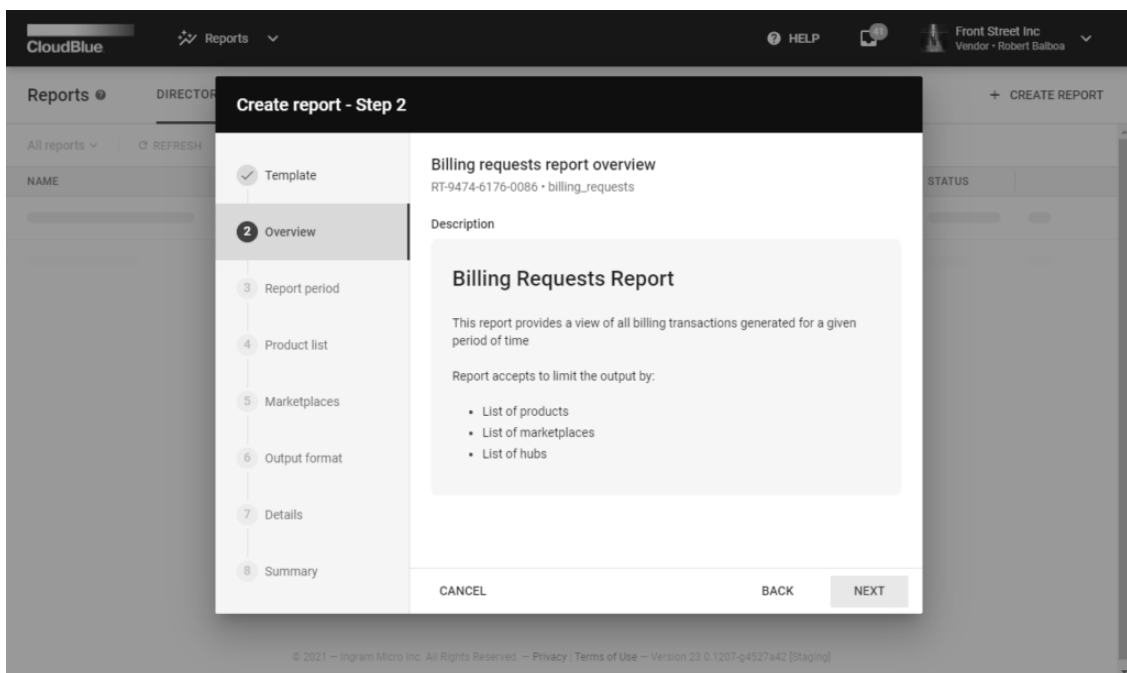
Note that the wizard steps change depending on your selected template.



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.

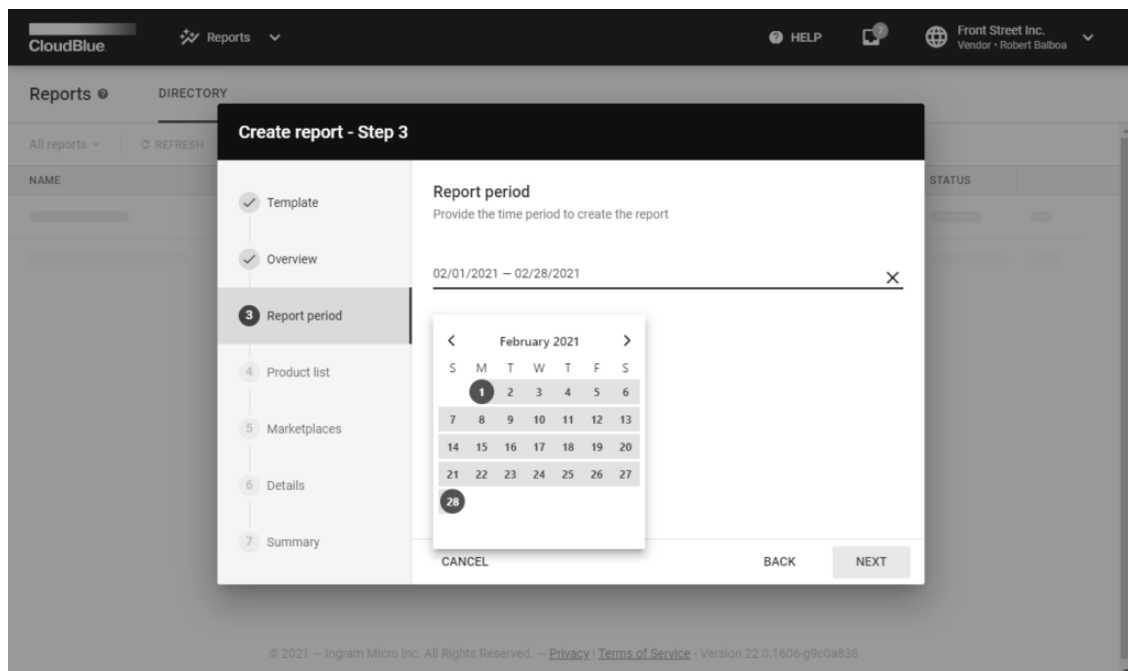
Parameters

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.

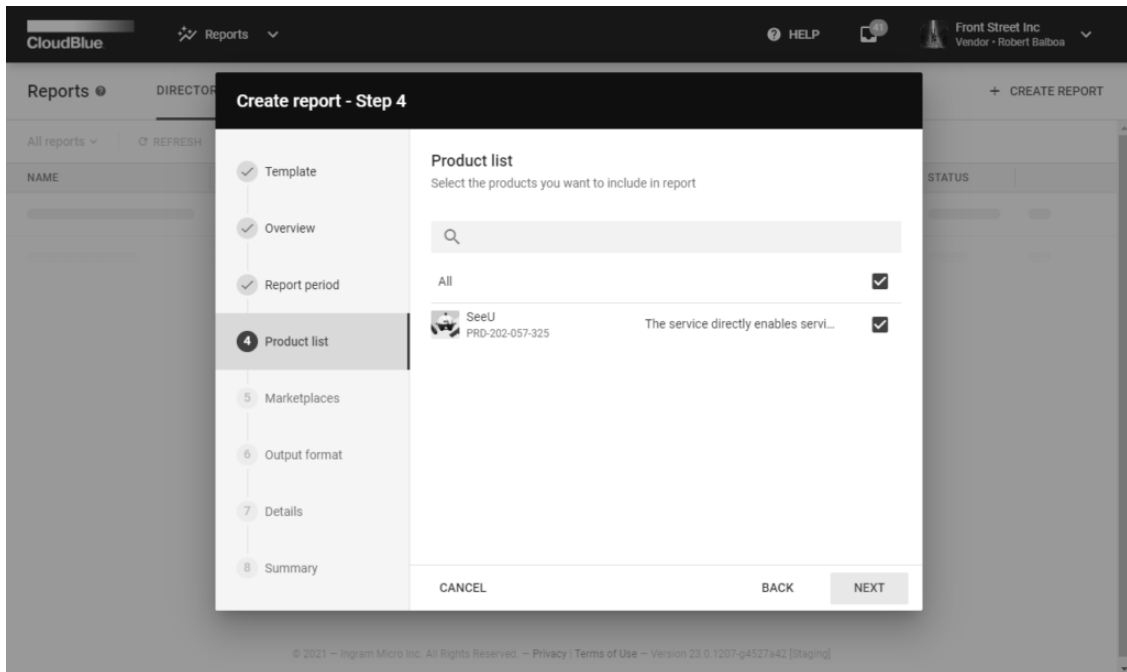
Choose the start date from the calendar by clicking on it. Thereafter, specify the end date by clicking on the calendar once again.



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

Product list

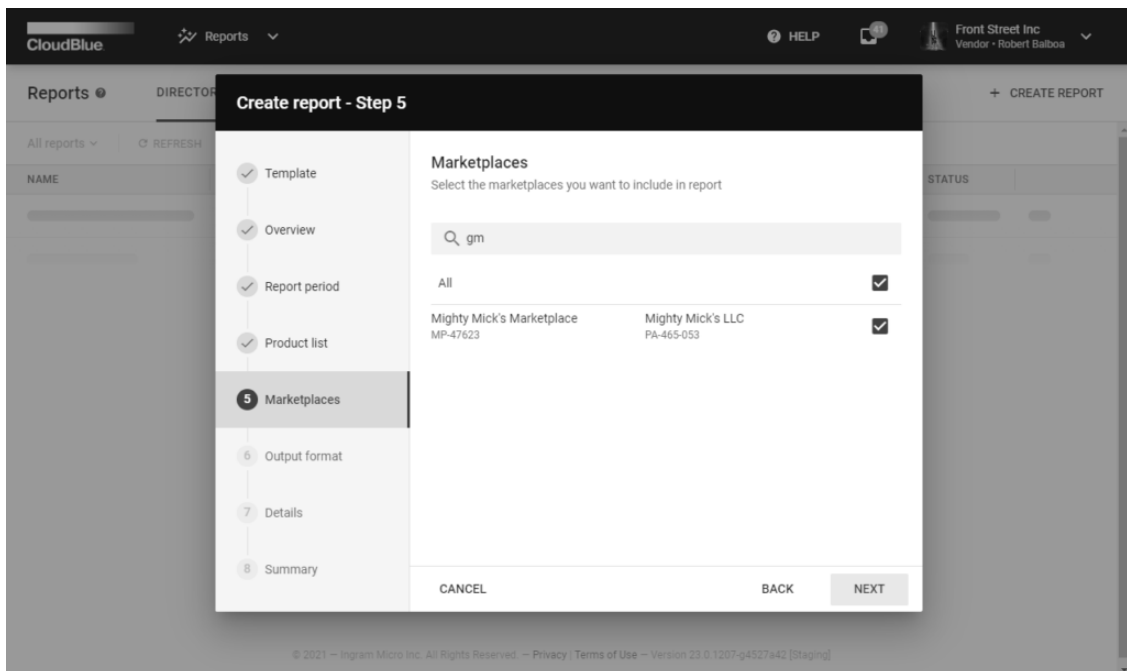
Specify a product from the following product list.



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

Marketplace

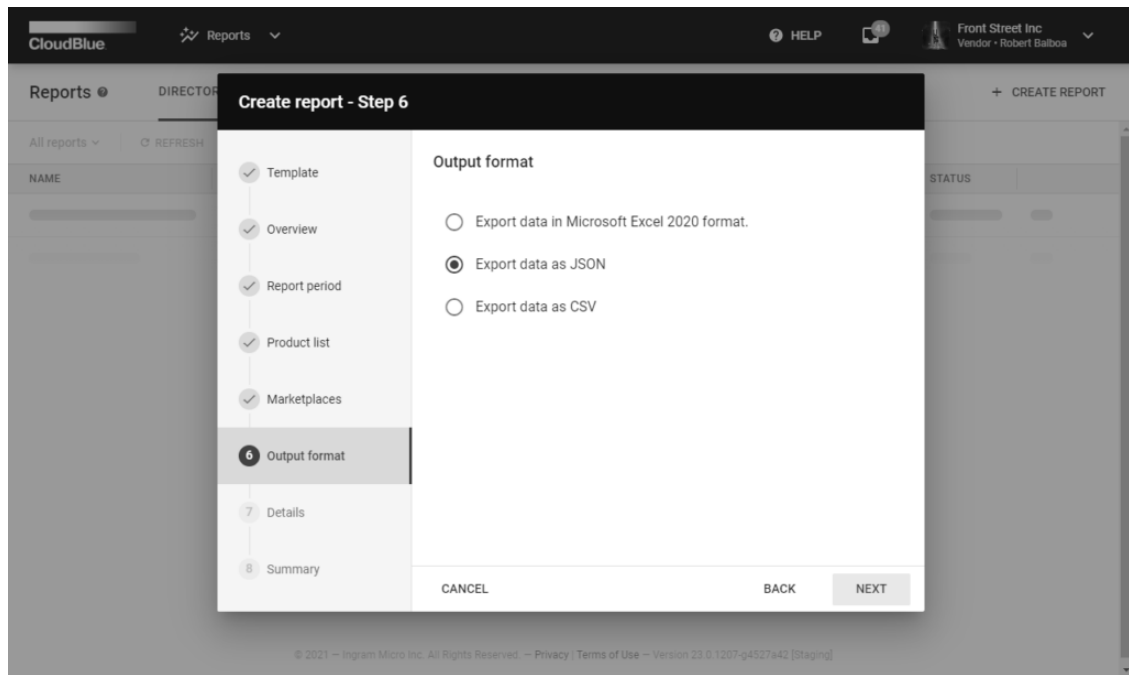
Select a marketplace from the following list.



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

Output Format

Select XLSX, JSON or CSV as your report file output format. Note that system doesn't allow changing your output format once your report file is created.

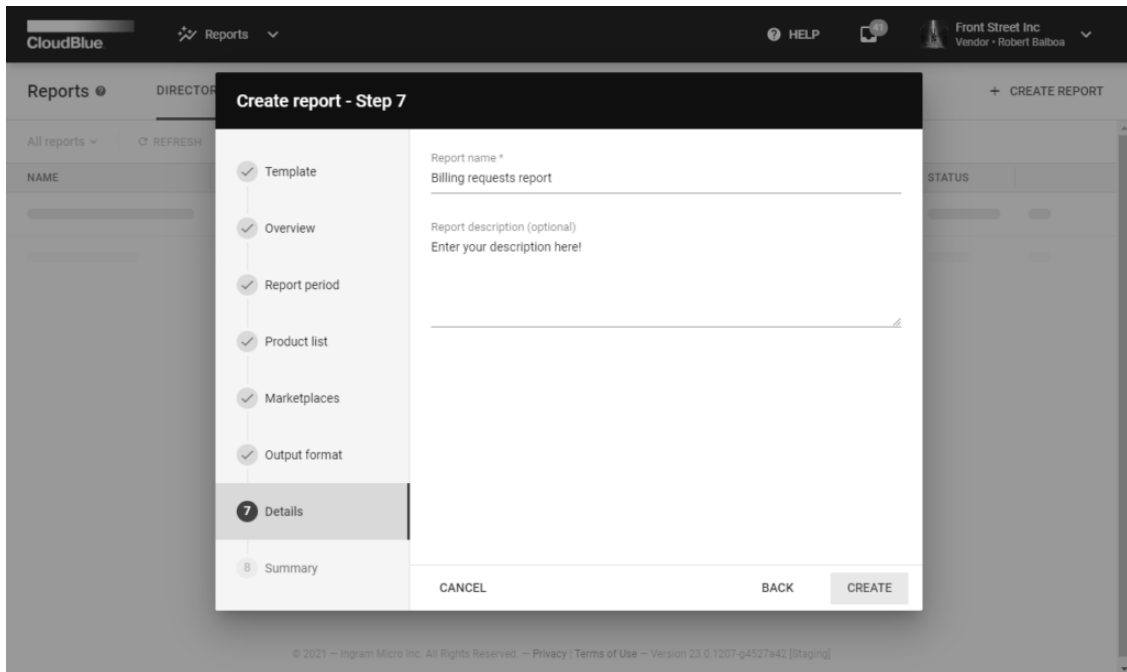


Click **Next** to continue.

Details

Specify the following report details:

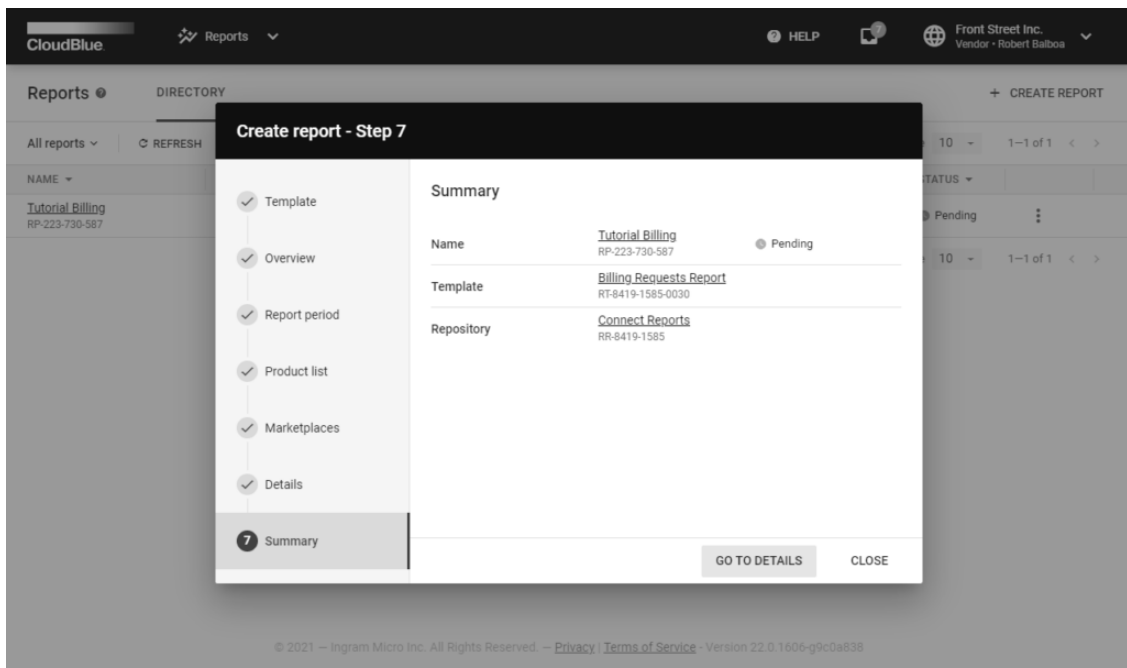
- **Report name:** Enter your report name in this field.
- **Report description:** Provide a description for your report (optional)



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

Summary

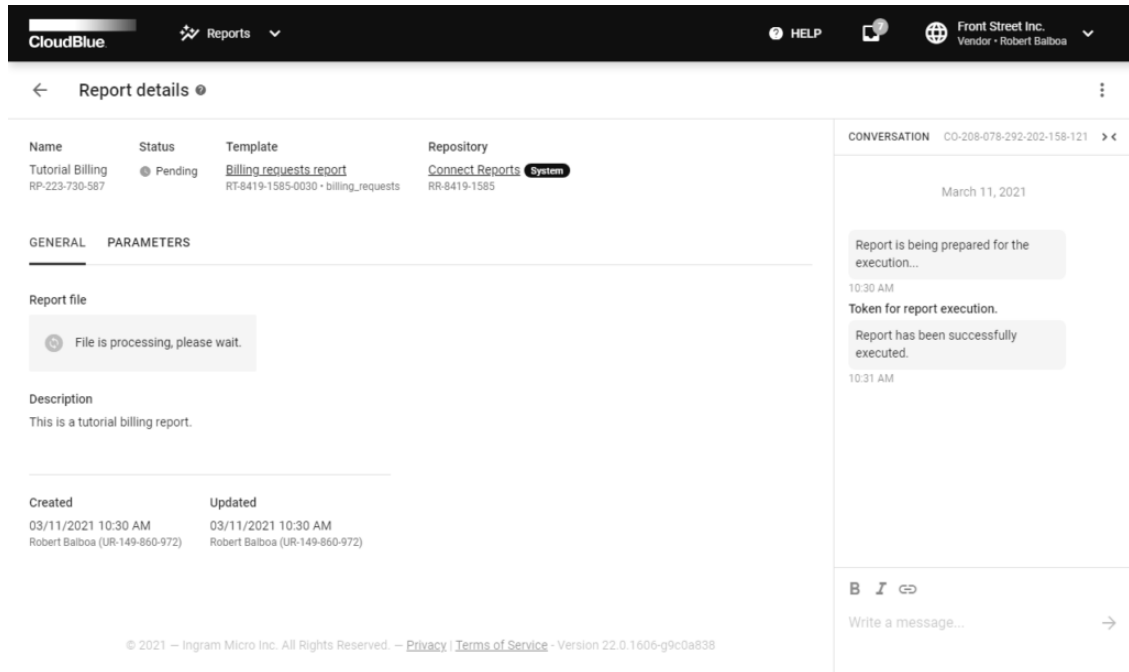
Once your report object is created, the system provides a summary.



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 **Directory** tab of the Reports module to access the **Report details** screen.



The screenshot displays the 'Report details' screen in the CloudBlue interface. At the top, there is a navigation bar with the CloudBlue logo, a 'Reports' dropdown menu, and user information for 'Front Street Inc.' with 'Vendor - Robert Balboa'. Below the navigation bar, the page title is 'Report details'. The main content area is divided into two sections: a metadata table and a conversation log.

Name	Status	Template	Repository
Tutorial Billing RP-223-730-587	Pending	Billing requests report RT-8419-1585-0030 • billing_requests	Connect Reports RR-8419-1585 System

Below the table, there are two tabs: 'GENERAL' (selected) and 'PARAMETERS'. Under 'GENERAL', there is a 'Report file' section with a status message: 'File is processing, please wait.' and a 'Description' section with the text: 'This is a tutorial billing report.' At the bottom of the 'GENERAL' section, there is a table for 'Created' and 'Updated' dates and user information.

Created	Updated
03/11/2021 10:30 AM Robert Balboa (UR-149-860-972)	03/11/2021 10:30 AM Robert Balboa (UR-149-860-972)

On the right side of the screen, there is a 'CONVERSATION' panel with the ID 'CO-208-078-292-202-158-121'. It shows a message log for 'March 11, 2021' with three entries: 'Report is being prepared for the execution...' at 10:30 AM, 'Token for report execution.' at 10:31 AM, and 'Report has been successfully executed.' at 10:31 AM. Below the log is a text input field with a 'Write a message...' placeholder and a send button.

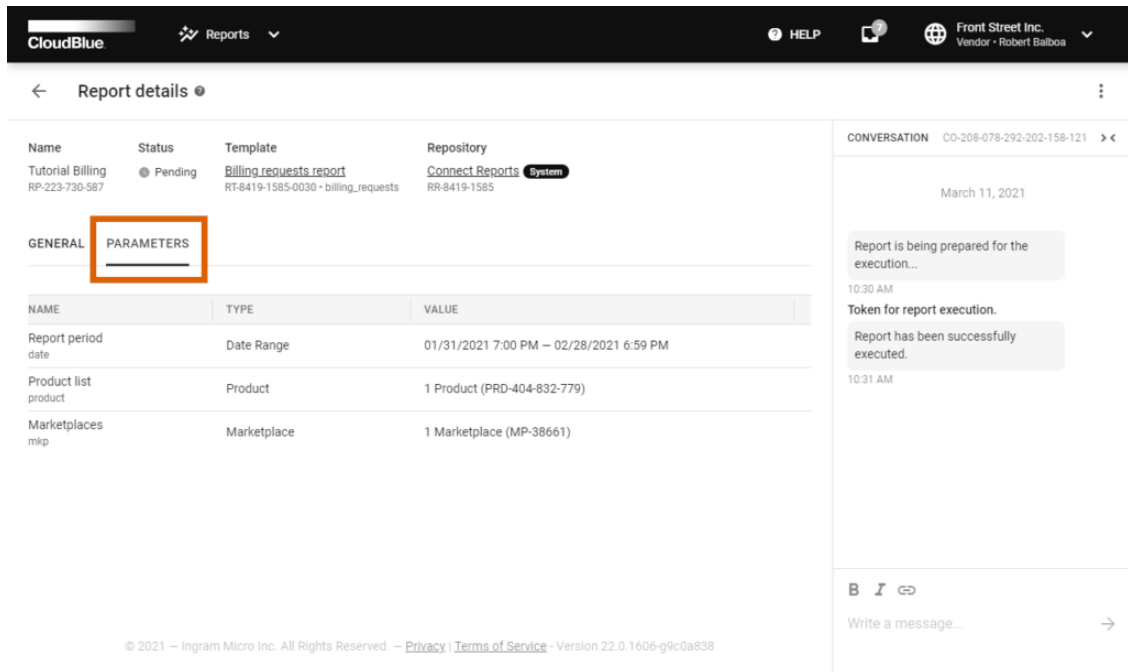
At the bottom of the page, there is a footer: '© 2021 – Ingram Micro Inc. All Rights Reserved. – Privacy | Terms of Service - Version 22.0.1606-g9c0a838'.

The **Report details** screen contains your report object 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.



CloudBlue Reports

Report details

Name	Status	Template	Repository
Tutorial Billing RP-223-730-587	Pending	Billing requests report RT-8419-1585-0030 • billing_requests	Connect Reports RR-8419-1585 System

GENERAL **PARAMETERS**

NAME	TYPE	VALUE
Report period date	Date Range	01/31/2021 7:00 PM – 02/28/2021 6:59 PM
Product list product	Product	1 Product (PRD-404-832-779)
Marketplaces mkg	Marketplace	1 Marketplace (MP-38661)

CONVERSATION CO-208-078-292-202-158-121

March 11, 2021

Report is being prepared for the execution...

10:30 AM

Token for report execution.

Report has been successfully executed.

10:31 AM

Write a message...

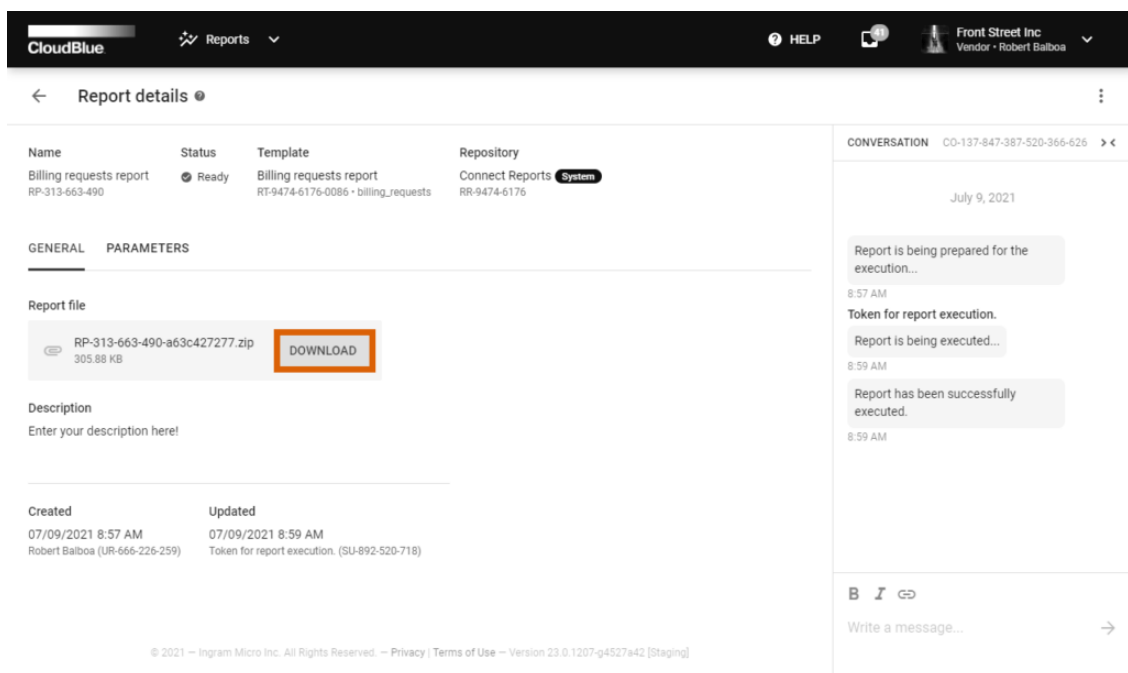
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Note that provided parameters vary depending on the selected report template.

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.



CloudBlue Reports

Report details

Name	Status	Template	Repository
Billing requests report RP-313-663-490	Ready	Billing requests report RT-9474-6176-0086 • billing_requests	Connect Reports RR-9474-6176 System

GENERAL **PARAMETERS**

Report file

RP-313-663-490-a63c427277.zip
305.88 KB **DOWNLOAD**

Description
Enter your description here!

Created	Updated
07/09/2021 8:57 AM Robert Balboa (UR-666-226-259)	07/09/2021 8:59 AM Token for report execution. (SU-892-520-718)

CONVERSATION CO-137-847-387-520-366-626

July 9, 2021

Report is being prepared for the execution...

8:57 AM

Token for report execution.

Report is being executed...

8:59 AM

Report has been successfully executed.

8:59 AM

Write a message...

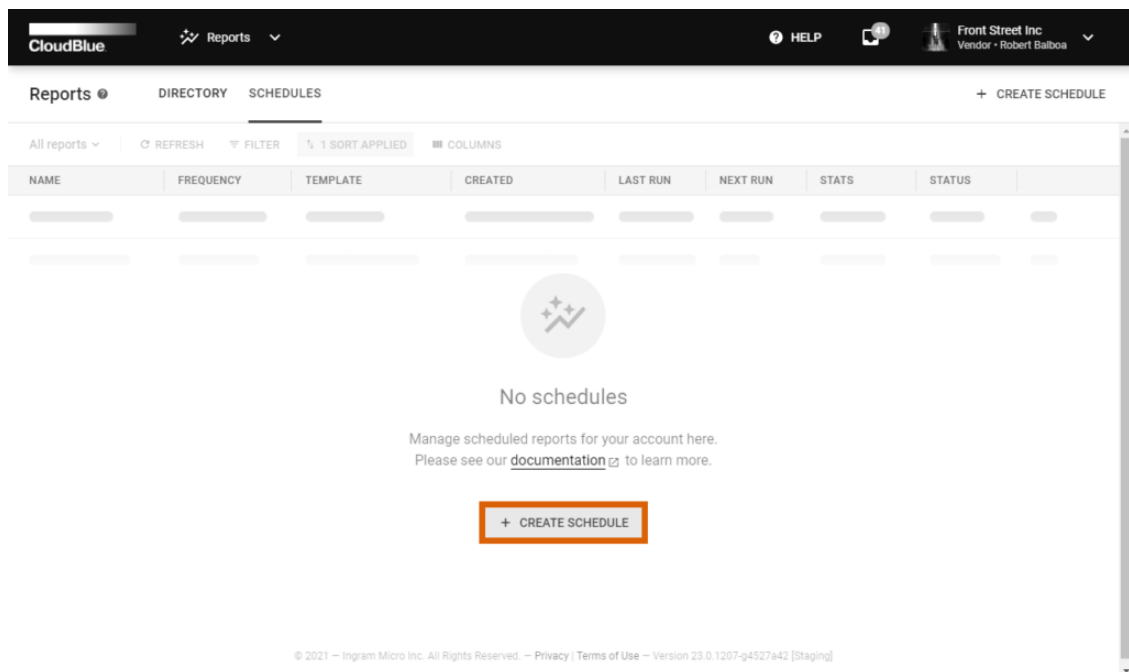
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Once your report file is downloaded successfully, you can delete the report object by clicking on the vertical ellipsis icon and selecting the *Delete* option. Note, however, that your deleted report objects cannot be restored.

Schedule Creation

The CloudBlue Connect platform can systematically generate required reports on your scheduled time via the **Schedules** tab. The system allows creating schedule objects by using a wizard that provides various trigger configurations and includes the same set of available templates and report parameters as presented within the report creation wizard.

Access the **Schedules** tab and click the **Create Schedule** to launch the schedule creation wizard.

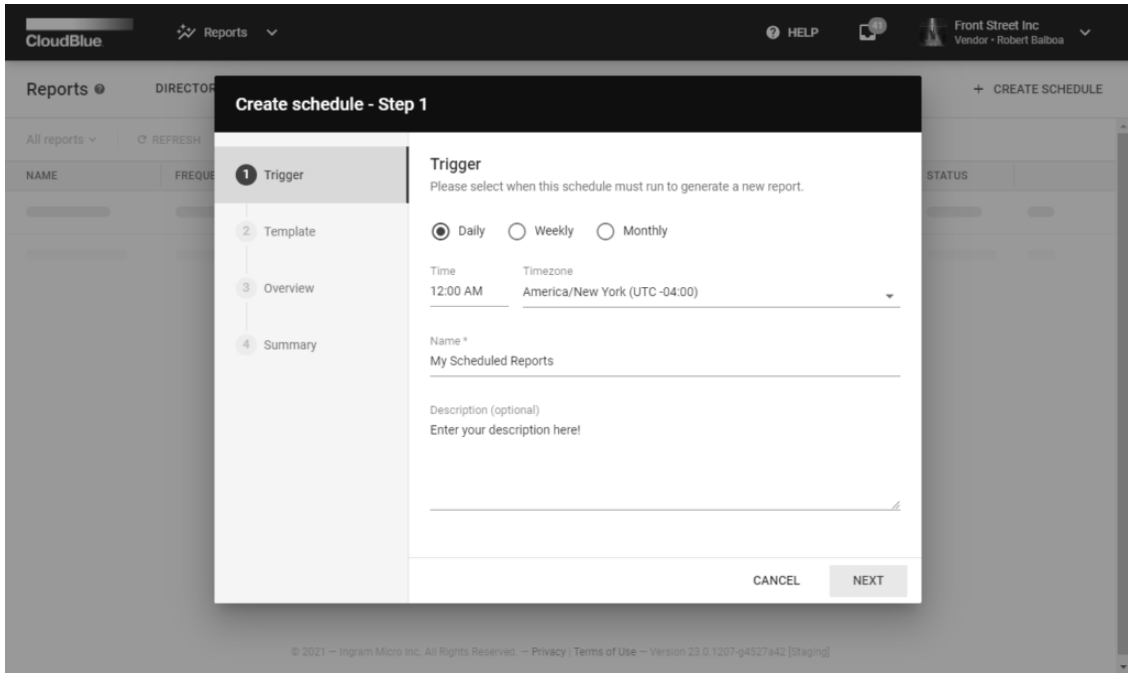


Follow the wizard steps to successfully configure your scheduled reports creation.

Trigger

Specify your schedule trigger configurations as follows:

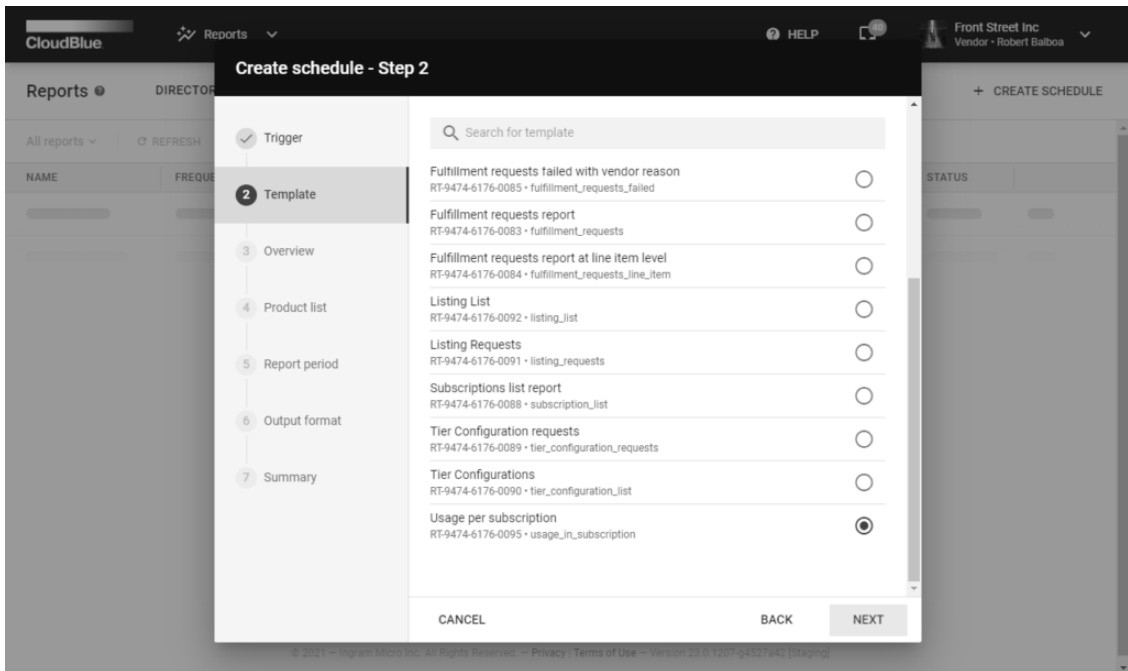
- **Daily/ Weekly/ Monthly:** The system can generate reports daily, weekly or once a month. Note that the following options vary depending on your selected schedule type.
- **Day of month/week:** Choose month day or week day by using this field.
- **Time:** Select your report file creation time.
- **Timezone:** Specify required timezone in this field.
- **Name:** Enter a name for your schedule object.
- **Description:** Provide a description for your schedule object (optional).



Click **Next** to continue.

Template

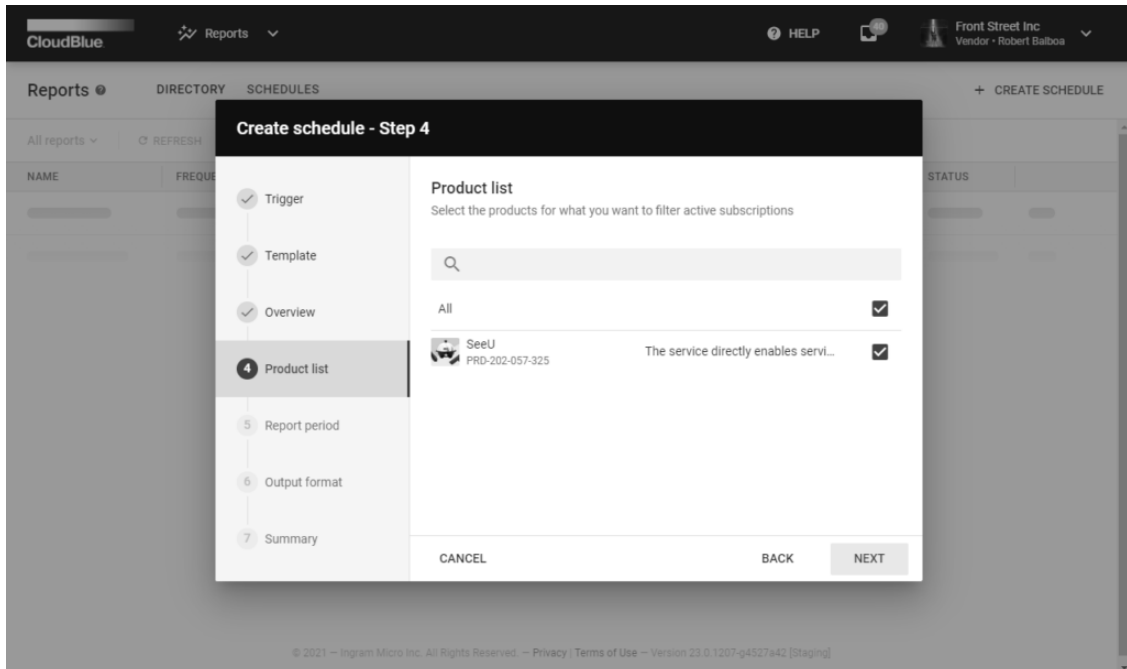
Choose your template from the list. Note that the following steps vary depending on your selected template.



Get familiar with the template overview and continue with report parameters configuration.

Product List

Select a product list in case the system prompts to specify such parameter.

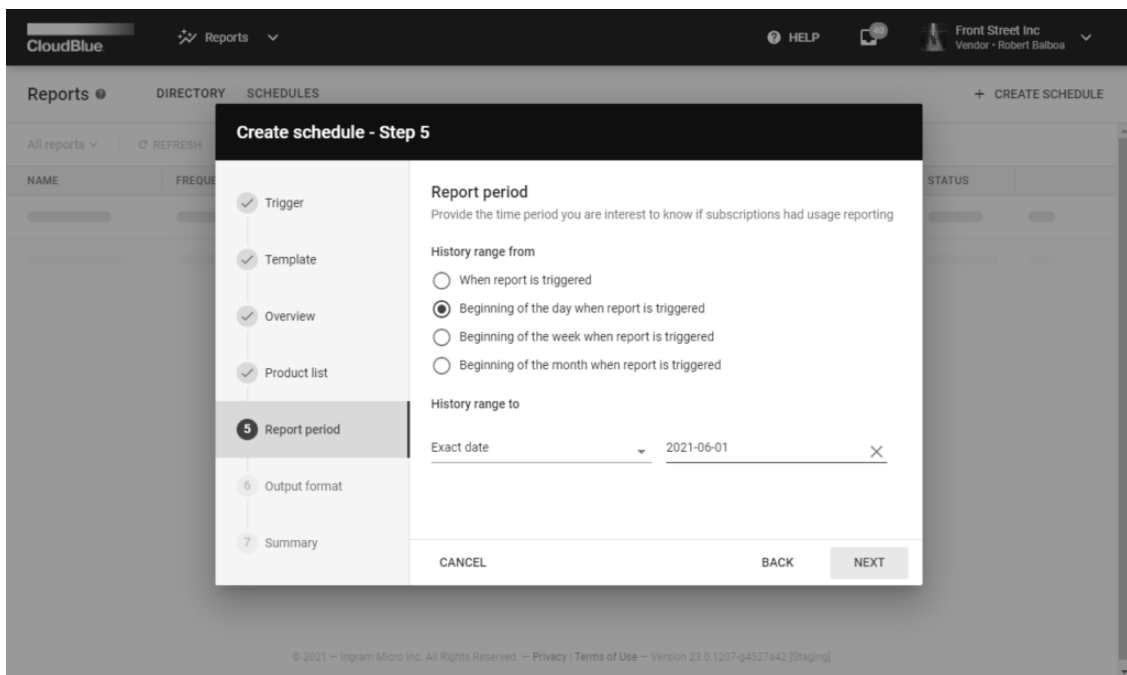


Note that you can select several products or select all of your products by checking the corresponding checkbox.

Report period

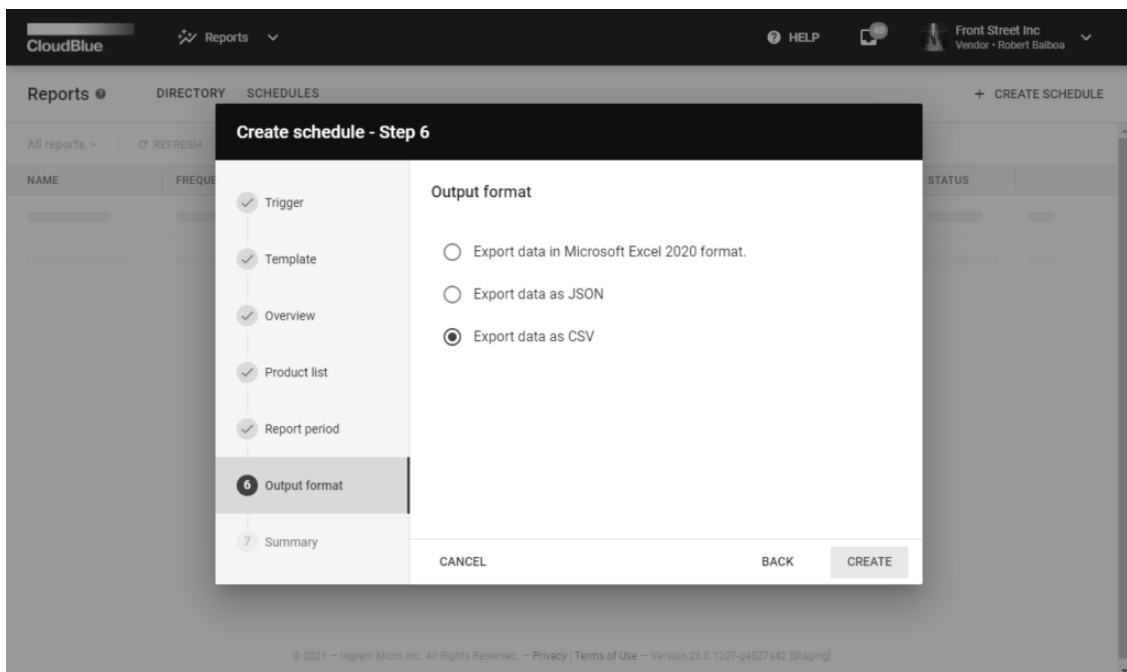
Fill out the report period form as follows:

- **History range from:** Select the initial history range date in this field. Choose the report trigger date or beginning of the day/week/month when your report is triggered.
- **History range to:** Specify the final history range date or select the number of days/weeks/months before the initial history range date.



Output format

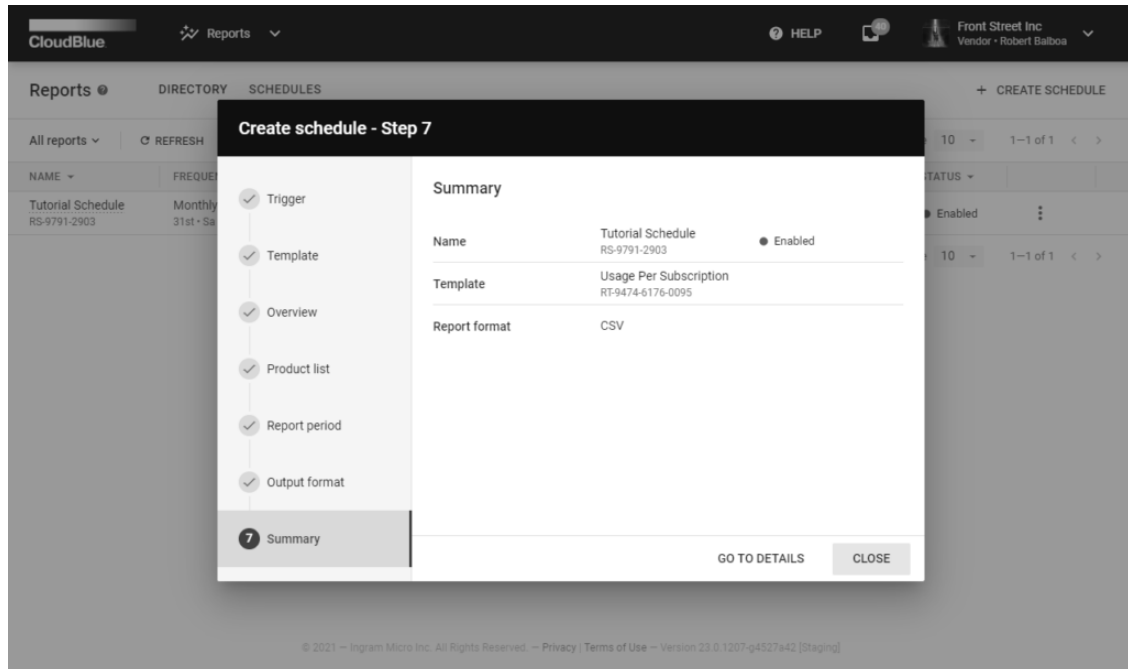
Select XLSX, JSON or CSV as your report file output format.



In this case, system allow changing your output format from the *Schedule Details* screen.

Summary

Once your reports schedule is successfully configured, the system provides your created schedule summary as the final step.



By default your report schedule is enabled. Turn the schedule off and on by clicking the vertical ellipsis (⋮) icon and using *Disable/Enable* options from the provided interface.

Schedule Details

Click on the [schedule name](#) from the Schedules tab to access the **Schedule Details** screen.

CloudBlue

[HELP](#)
Front Street Inc
Vendor - Robert Balboa

← Schedule Details

[TRIGGER NOW](#)
[EDIT](#)

Name	Schedule	Status	Stats	Template	Output Format
Tutorial Schedule RS-9791-2903	Monthly 31st - Sa + 9:00 PM	● Enabled	Total: 0 Average: 0	Usage per subscription RT-9474-6176-0095 - usage_in_subscription	CSV

GENERAL **PARAMETERS** **REPORTS**

Description
The following represents a tutorial report schedule.

Created 07/09/2021 11:00 AM Robert Balboa (UR-666-226-259)	Updated 07/09/2021 11:00 AM Robert Balboa (UR-666-226-259)
---	---

CONVERSATION CO-463-683-108-515-041-755 ><

July 9, 2021

Robert Balboa

The schedule has been created.

11:00 AM

B I Write a message... →

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CloudBlue

[HELP](#)
Front Street Inc
Vendor - Robert Balboa

← Schedule Details

[TRIGGER NOW](#)
[EDIT](#)

Name	Schedule	Status	Stats	Template	Output Format
Tutorial Schedule RS-9791-2903	Monthly 31st - Sa + 9:00 PM	● Enabled	Total: 0 Average: 0	Usage per subscription RT-9474-6176-0095 - usage_in_subscription	CSV

GENERAL **PARAMETERS** **REPORTS**

NAME	TYPE	VALUE
Product list product	Product	All Products
Report period period	Date Range	From 05/31/2021 8:00 PM to the start of the day when report is executed

CONVERSATION CO-463-683-108-515-041-755 ><

July 9, 2021

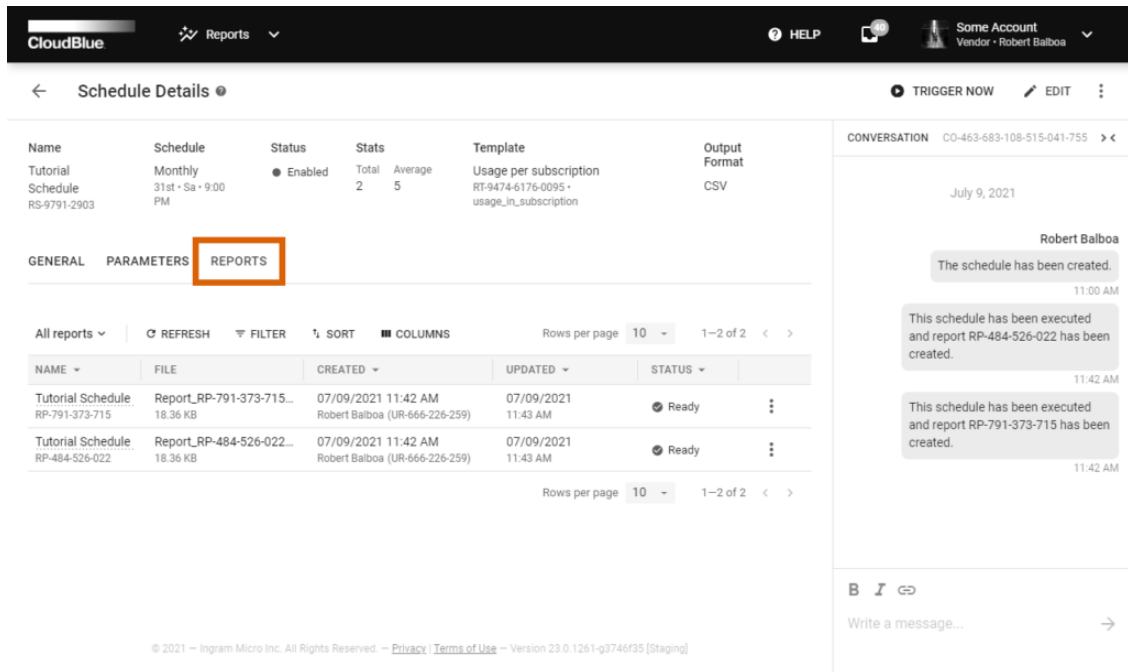
Robert Balboa

The schedule has been created.

11:00 AM

B I Write a message... →

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The screenshot shows the 'Schedule Details' page for a report named 'Tutorial Schedule'. The page includes a table with columns for Name, Schedule, Status, Stats, Template, and Output Format. The 'REPORTS' tab is highlighted in orange. Below the table, there are tabs for GENERAL, PARAMETERS, and REPORTS. The REPORTS tab shows a list of reports with columns for NAME, FILE, CREATED, UPDATED, and STATUS. The status of both reports is 'Ready'. On the right side, there is a 'CONVERSATION' panel showing messages from Robert Balboa, including 'The schedule has been created.' and 'This schedule has been executed and report RP-484-526-022 has been created.'.

Name	Schedule	Status	Stats	Template	Output Format
Tutorial Schedule RS-9791-2903	Monthly 31st - Sa - 9:00 PM	Enabled	Total: 2 Average: 5	Usage per subscription RT-9474-6176-0095 - usage_in_subscription	CSV

NAME	FILE	CREATED	UPDATED	STATUS
Tutorial Schedule RP-791-373-715	Report_RP-791-373-715... 18.36 KB	07/09/2021 11:42 AM Robert Balboa (UR-666-226-259)	07/09/2021 11:43 AM	Ready
Tutorial Schedule RP-484-526-022	Report_RP-484-526-022... 18.36 KB	07/09/2021 11:42 AM Robert Balboa (UR-666-226-259)	07/09/2021 11:43 AM	Ready

This screen displays your selected template, output format, schedule status (*enabled* or *disabled*), specified schedule, description, update and creation date and more.

The Schedule Details screen also allows changing your parameters and trigger options by clicking the **Edit** button at the top-right corner of the screen. Review the provided report parameter values by accessing the **Parameters** tab.

Click the **Trigger Now** button to generate a report file immediately. Access and download your report files by using the **Reports** tab of the Schedule Details screen.

Note that your generated reports will also be available via the *Directory* tab of the Reports module.