

# Climber Custom Report

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[Download Climber Custom Report v2.6.1](#)

## Most recent update 2.6.1 - 2019-03-11

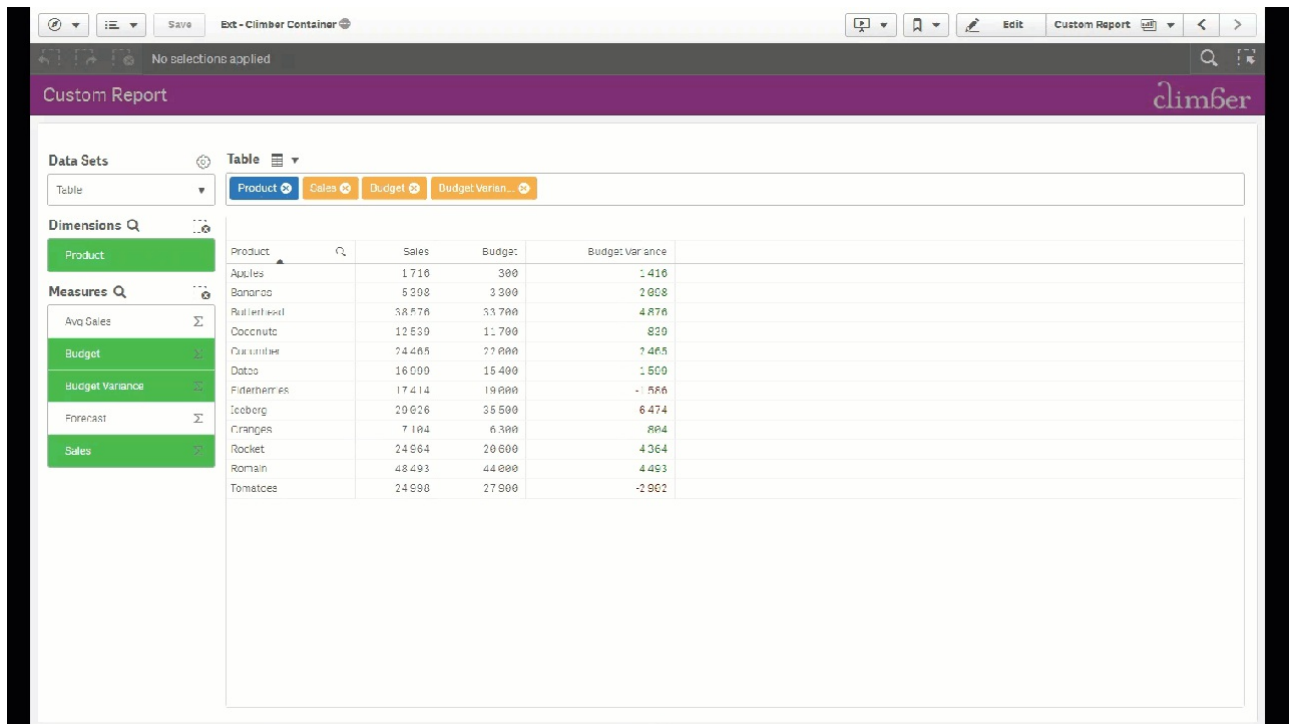
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### Fixed

- ES-11497 Alert variable already exists

Full CHANGELOG can be found end of this file.

## Self service without edit-mode for Qlik Sense!



Product	Sales	Budget	Budget Variance
Apples	1 710	300	1 410
Bananas	5 208	3 300	2 008
Butterhead	38 876	33 700	4 876
Cucumbers	12 630	11 700	820
Onions	24 485	22 000	2 485
Potatoes	16 000	15 400	1 500
Fiddlers	17 414	19 000	-1 586
Iceberg	20 626	35 500	6 474
Oranges	7 104	6 300	804
Rocket	24 664	20 600	4 364
Romain	48 493	44 000	4 493
Tomatoes	24 590	27 900	-2 902

## Purpose and Description

**IMPORTANT!** Any older Custom Report objects need to be recreated with version 2.0!

In QlikView we saw a lot of users requesting a customizable straight table. In Qlik Sense we have created something even better! The Custom Report extension allows the user to create custom tables based on data in master tables.

With Custom Report + you can create your own personalized bookmarks and add shareable presets for your reports. In Custom Report + we have also extended the visualization types to include pivot tables and combo charts (more details below).

First thing to do is create a simple straight table and make it a master item. The table is will now be accessible in Custom Report and you can select to show any or all measures and dimensions. Number format follows from the master item so no need to redo formatting!

**Tested with Qlik Sense November 2017 and later**

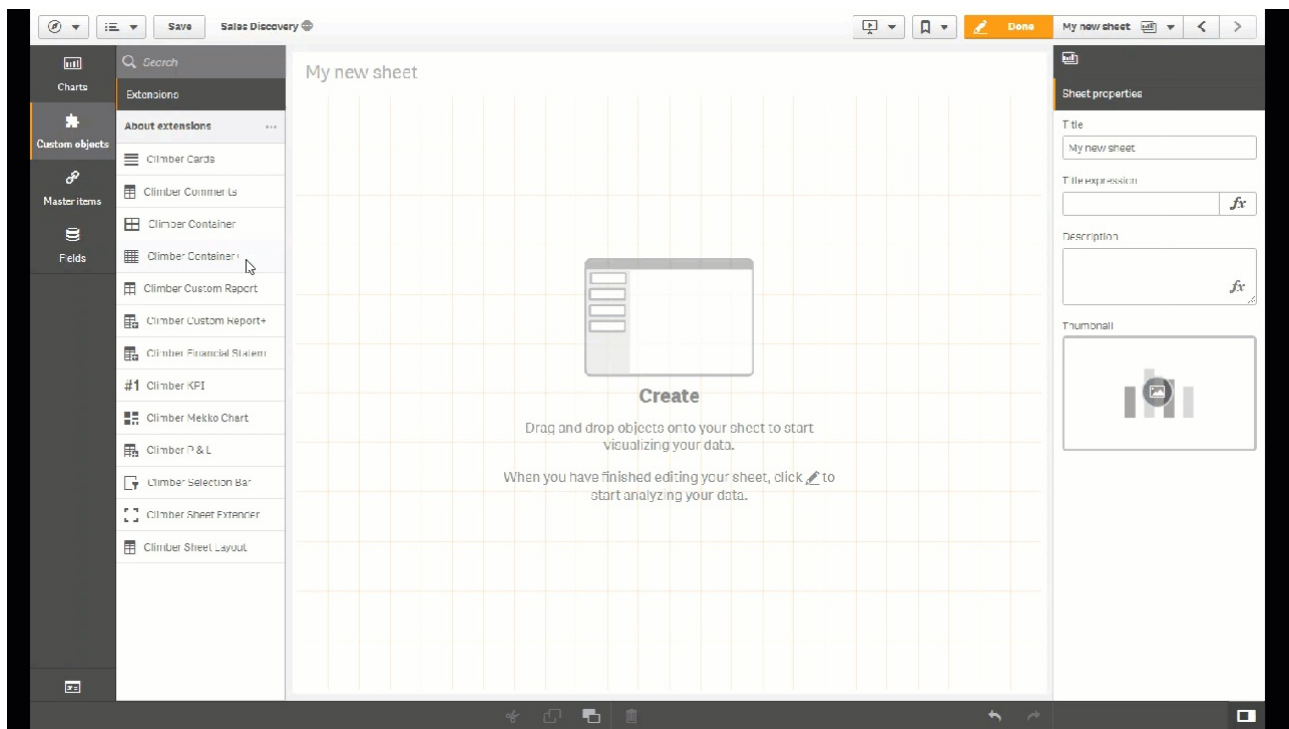
## Custom Report vs Custom Report +

Feature	Custom Report	Custom Report +	Comments
Unlimited Data Sets	✓	✓	
Sums on/off	✓	✓	
Search and select dimensions & measures	✓	✓	
Climber Logo	✓		
Straight Table	✓	✓	Defined by superuser/developer
Pivot Table		✓	
Combo Chart		✓	
Export to Excel/PDF/Image		✓	
Export to App	✓	✓	Qlik Sense license limitations may apply.
Export to Template		✓	
Default state per Data Set	✓	✓	
Presets		✓	
Bookmarks		✓	

For more information about Custom Report + and our subscription model please check out our extension [page \(https://www.climber.se/erbjudande/verktyg/climber-extensions-for-qlik-sense/\)](https://www.climber.se/erbjudande/verktyg/climber-extensions-for-qlik-sense/).

## Setup

1. Create one or more Master Item Tables with the dimensions and measures you want to visualize.
2. Select Master Item in the drop-down or drag and drop it on the visualization



## Defaults, presets and bookmarks

### Default states

All added data sets can have a default state when a new session is opened, i.e. preselected dimensions and measures. Even the table column widths are saved in the state. It is recommended to always set a default state so the user does not have to start with an empty table.

To create a new default state for a dataset go in to edit mode. Select your measures/dimensions you want to set in you default state and click "Save default state". After you added a default state you can always show your current default state by clicking on the button "show default state".

To change your default state, just make your new selections and click "Save default state" again.

## -Save default state

The screenshot shows the application interface with the 'Table' visualization selected. The 'Data Sets' panel on the left shows 'Product' as the dimension and 'Avg Sales', 'Budget', 'Budget Variance', 'Forecast', and 'Sales' as measures. The main table displays data for various products. On the right sidebar, the 'Add Data Set' button is at the top, followed by 'Table' and 'Visualization types' (Table, Pivot table, Combo ch...). The 'Save default state' button is highlighted with an orange arrow.

Product	Sales	Budget Variance	Budget
Apples	1 716	1 416	300
Bananas	5 398	2 098	3 300
Butterhead	38 576	4 876	33 700
Coconuts	12 539	839	11 700
Cucumber	24 465	2 465	22 000
Dates	16 999	1 599	15 400
Elderberries	17 414	-1 586	19 000
Iceberg	29 026	-6 474	35 500
Oranges	7 104	804	6 300
Rocket	24 964	4 364	20 600
Romain	48 493	4 493	44 000
Tomatoes	24 998	-2 992	27 900

## -Show default state

The screenshot shows the application interface with the 'Table' visualization selected. The 'Data Sets' panel on the left shows 'Product' as the dimension and 'Avg Sales', 'Budget', 'Budget Variance', 'Forecast', and 'Sales' as measures. The main table displays data for various products. On the right sidebar, the 'Add Data Set' button is at the top, followed by 'Table' and 'Visualization types' (Table, Pivot table, Combo ch...). The 'Show default state' button is highlighted with an orange arrow.

Product	Sales	Budget Variance	Budget
Apples	1 716	1 416	300
Bananas	5 398	2 098	3 300
Butterhead	38 576	4 876	33 700
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Cucumber	24 465	2 465	22 000
Dates	16 999	1 599	15 400
Elderberries	17 414	-1 586	19 000
Iceberg	29 026	-6 474	35 500
Oranges	7 104	804	6 300
Rocket	24 964	4 364	20 600
Romain	48 493	4 493	44 000
Tomatoes	24 998	-2 992	27 900

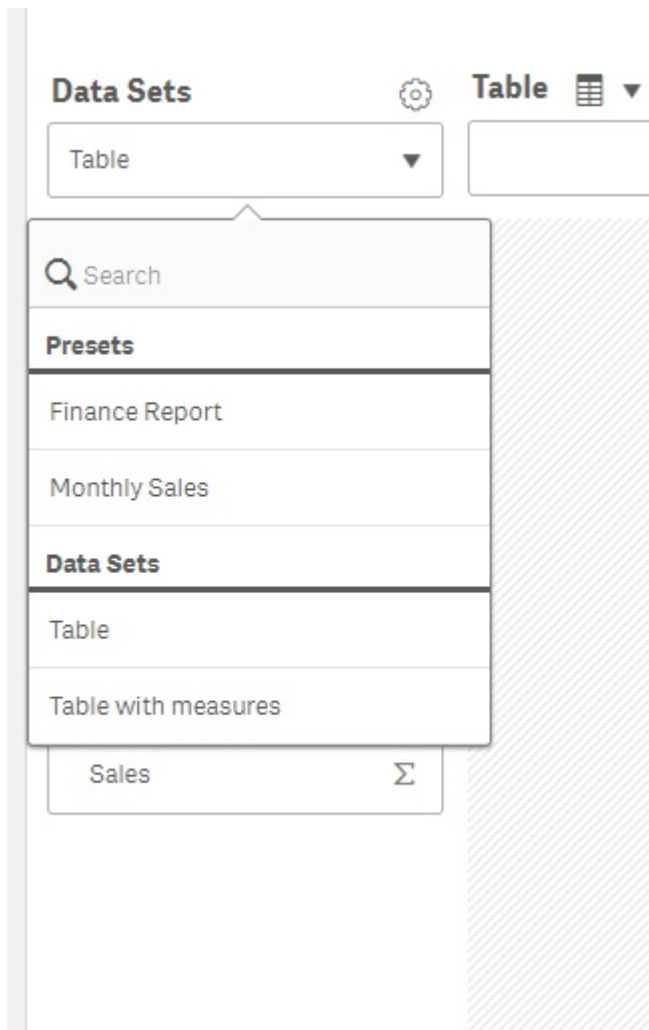
## Session

Within a session, all selections between the data sets will be saved, i.e. the default state will not be followed once the session is started. This makes it possible to easily change between data sets without losing the last state.

## Presets (Custom Report+)

It is possible for the developer/super users to create presets (i.e. a saved state). Presets will be accessible for all users in the application. This can be used for creating predefined reports.

Presets are accessible from the drop down of data sets



To create a preset select your dimensions/measures and go in to edit mode. Click on "presets" and click on "Add Preset". To change a preset, change your selections and click "Save preset".

You can always show a current preset by clicking "show preset"

**Add Preset**

▼ Finance Report



Finance Report

Report

Table

**Save preset**

**Show preset**

**Delete**

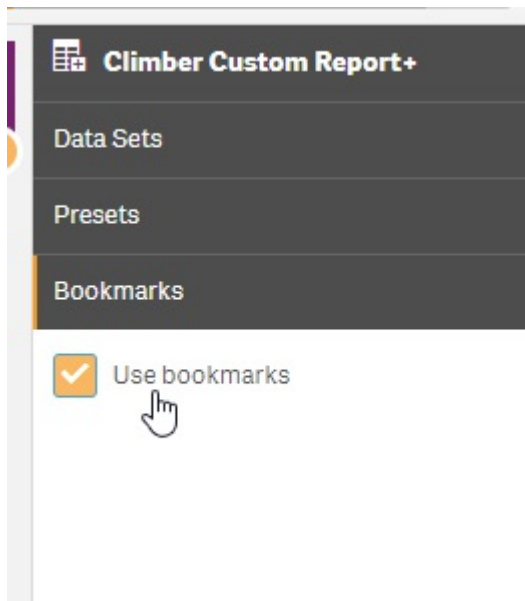


## Bookmarks (Custom Report+)

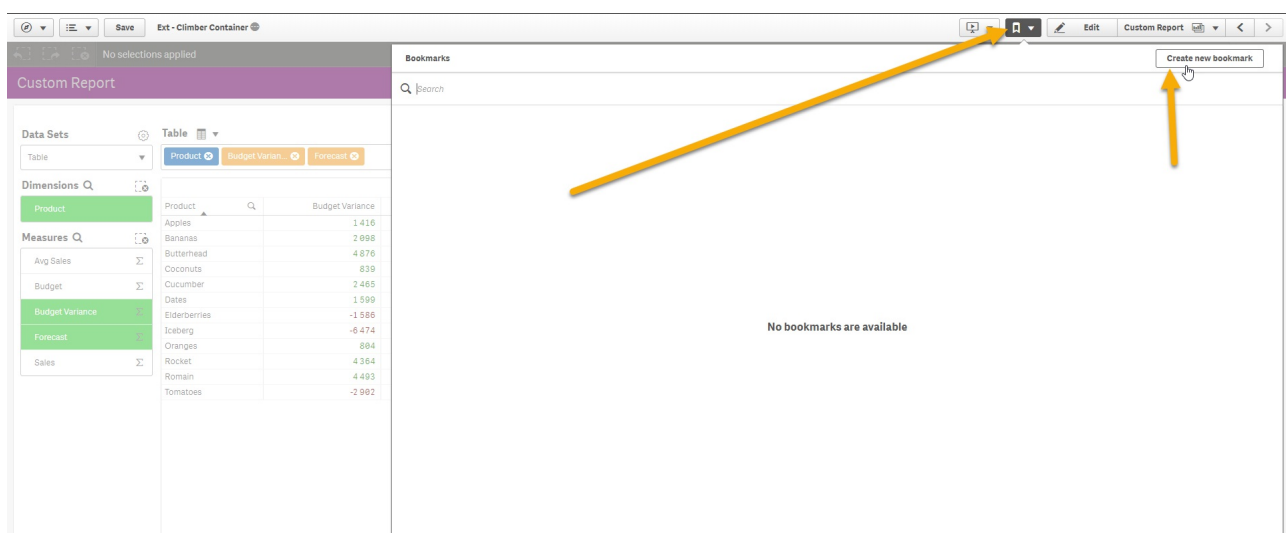
For the end user is possible to create personalized bookmarks. With bookmarks you can save a state and go back to that state using the standard Qlik Sense bookmark list.

How to use bookmarks

1. Enable bookmarks in Custom Report Object (enabled is default)

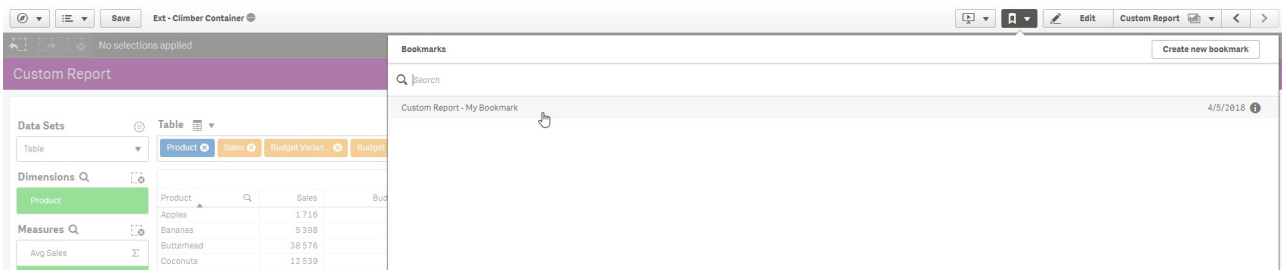


2. Use the bookmark creator [How to create a bookmark \(https://help.qlik.com/en-US/sense/2.1/Subsystems/Hub/Content/Bookmarks/create-bookmark.htm\)](https://help.qlik.com/en-US/sense/2.1/Subsystems/Hub/Content/Bookmarks/create-bookmark.htm)



3. Access the bookmarks





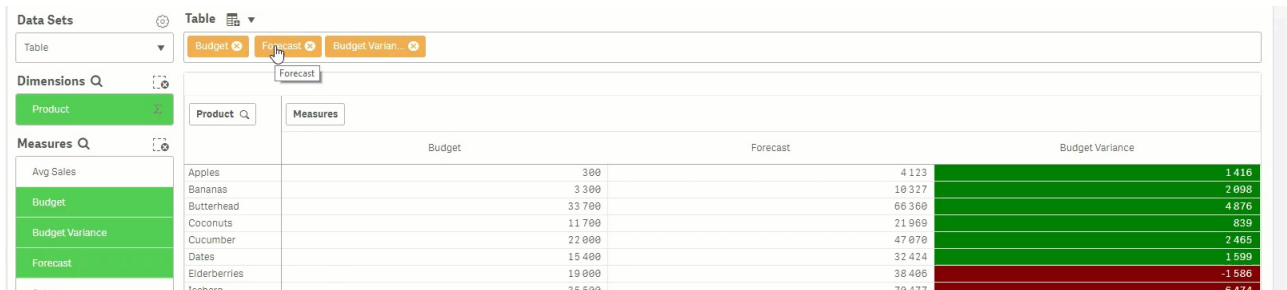
**Note!** To support bookmarks using the Qlik Sense standard functionality, the extension creates and use variables starting with "ClimberCustomReport". These variables values are stored in the selection state and therefore in bookmarks. This is not the default behaviour of variables created in the Qlik Sense client. If you accidentally delete the variable, entering Edit mode will recreate it if the app is not published. Variables are not automatically deleted. In the Custom Report+ state is stored even if Use Bookmarks is not enabled, but only applied if enabled.

**Note!** If the Custom Report should be used as a master items it need to disable Use Bookmarks and then enabled, after it's been added to the master library. This is due to the Custom Reports gets a new Id and a new variable needs to be created.

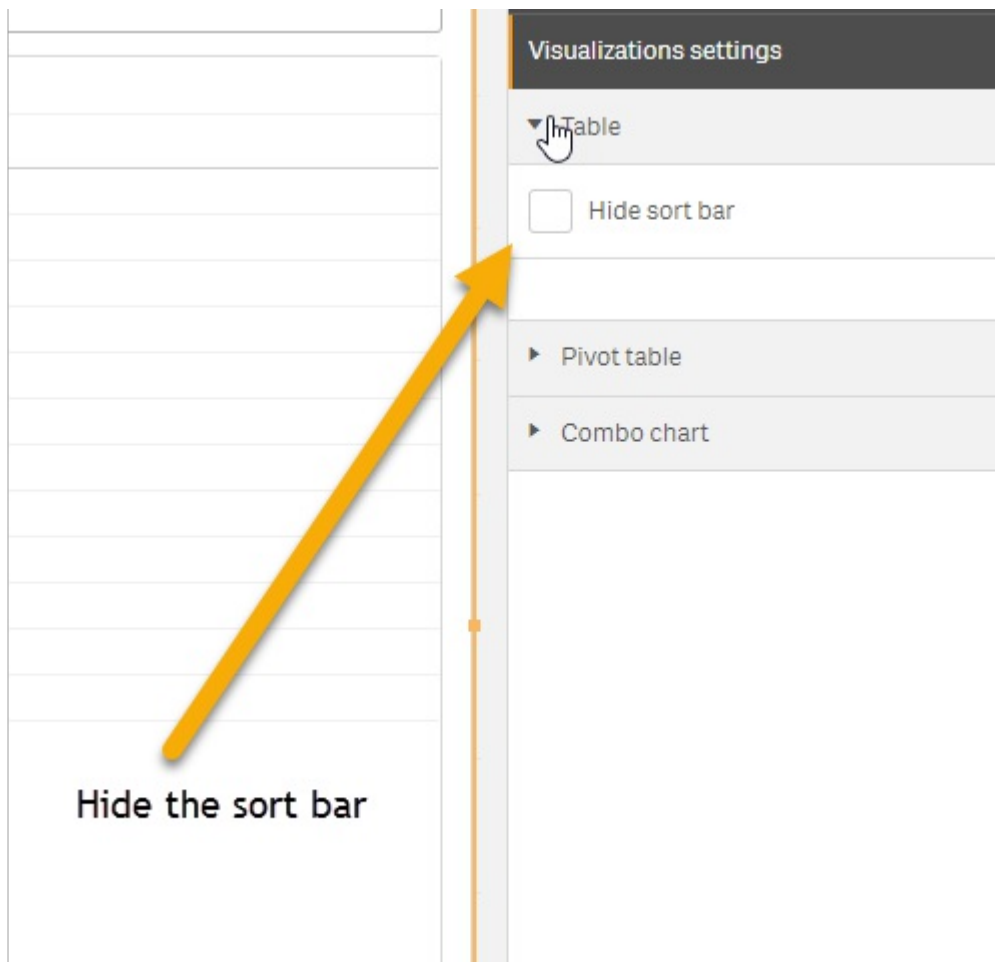
# Sort Bar

With the sort bar you can change the order of the dimensions and measures. It is possible to hide the sort bar for different visualizations types.

*From QS February 2018 it's possible to change column order in a table by dragging in the column header so typically a straight table does not need the Sort Bar*



Product	Budget	Forecast	Budget Variance
Apples	300	4123	1416
Bananas	3300	10327	2098
Butterhead	33700	66300	4876
Coconuts	11700	21909	839
Cucumber	22000	47070	2465
Dates	15400	32424	1599
Elderberries	19000	38406	-1586
Icecream	35500	70477	-6474



Visualizations settings

▼ Table

☐ Hide sort bar

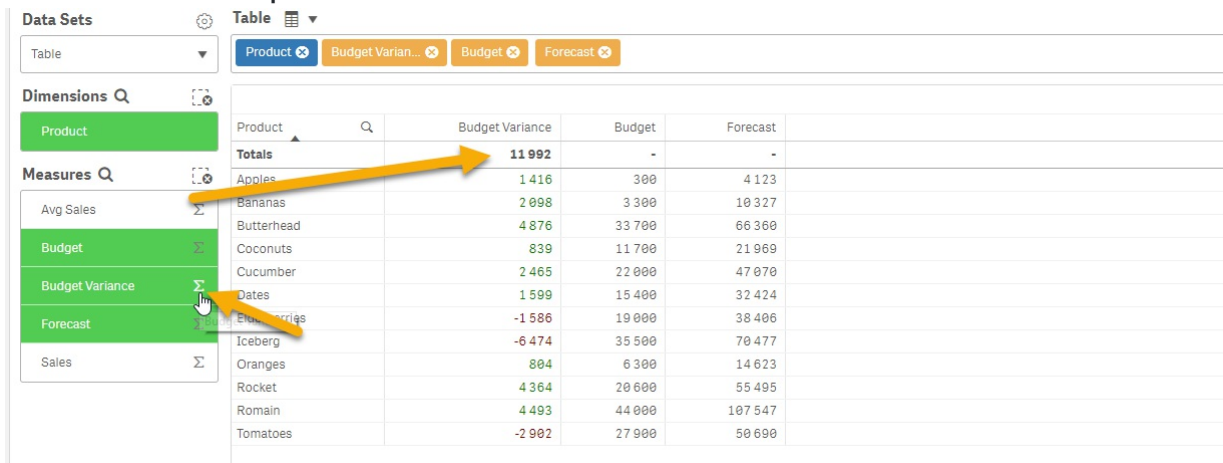
► Pivot table

► Combo chart

Hide the sort bar

## Other options

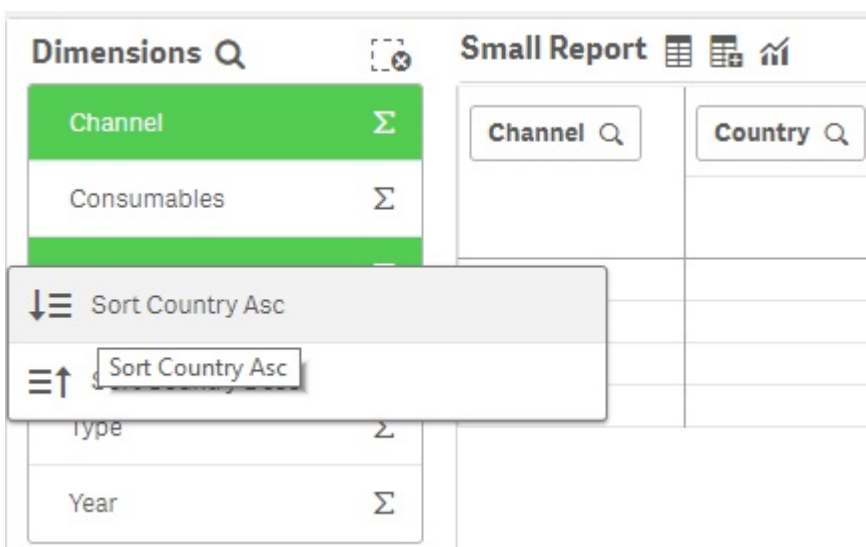
1. The objects used are standard Qlik Sense objects so all standard features such as export and sorting are available (Export to image/pdf does not work. See limitations below.)
2. Using a minimized version of the object you can put a custom report on any sheet along with the rest of the visualizations. Click arrows to expand to full screen!
3. Right-click menu allows you to make changes even with fields/sortbar hidden
4. Search in dimensions and measure list
5. Clear all selections
6. Add totals to table/pivot table



The screenshot shows a Qlik Sense interface with a table visualization. On the left, the 'Data Sets' pane is open, showing 'Dimensions' (Product) and 'Measures' (Avg Sales, Budget, Budget Variance, Forecast, Sales). The table has columns for Product, Budget Variance, Budget, and Forecast. A 'Totals' row is highlighted with an orange arrow.

Product	Budget Variance	Budget	Forecast
Totals	11 992	-	-
Apples	1 416	300	4 123
Bananas	2 098	3 300	10 327
Butterhead	4 876	33 700	66 360
Coconuts	839	11 700	21 969
Cucumber	2 465	22 000	47 070
Dates	1 599	15 400	32 424
Eldorado	-1 586	19 000	38 406
Iceberg	-6 474	35 500	70 477
Oranges	804	6 300	14 623
Rocket	4 364	20 600	55 495
Romain	4 493	44 000	107 547
Tomatoes	-2 902	27 900	50 690

7. Right-click selected dimension/measures. Dimensions only for Pivot Table, both for Combo chart. Table handle sort inside the visualization.

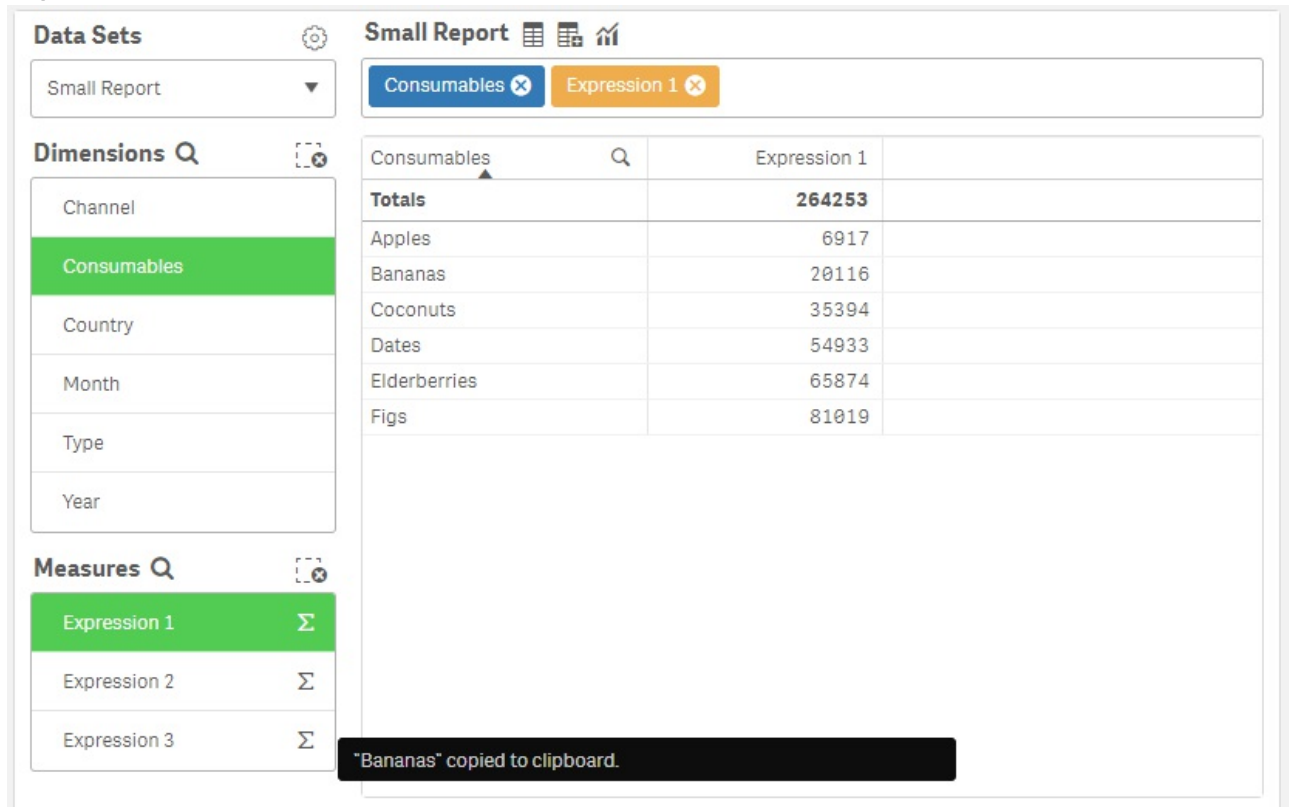


The screenshot shows a Qlik Sense interface with a table visualization. On the left, the 'Dimensions' pane is open, showing 'Channel' and 'Consumables'. A right-click context menu is open over the 'Channel' dimension, showing 'Sort Country Asc'.

Channel	Country
Consumables	

## Copy value Ctrl + C

Copy the value under the mouse cursor by pressing Ctrl + C. A notification will confirm the copied value at the bottom of the screen.



The screenshot shows a data visualization interface with the following components:

- Data Sets:** A dropdown menu showing "Small Report".
- Dimensions:** A list of dimensions including Channel, Consumables (highlighted), Country, Month, Type, and Year.
- Measures:** A list of measures including Expression 1 (highlighted), Expression 2, and Expression 3.
- Table:** A table with two columns: "Consumables" and "Expression 1". The table data is as follows:

Consumables	Expression 1
<b>Totals</b>	<b>264253</b>
Apples	6917
Bananas	20116
Coconuts	35394
Dates	54933
Elderberries	65874
Figs	81019

A notification at the bottom of the screen states: "Bananas" copied to clipboard.

## Copy table Shift + C (Custom Report+)

Copy the data table of the current visualization if it is less than 10 000 cells. A notification will appear at the bottom of the screen when the data is exported. Click the toast "Copy table to clipboard" to copy the table.

Data Sets



Small Report ▼

Dimensions 🔍



Channel
Consumables
Country
Month
Type
Year

Measures 🔍



Expression 1	Σ
Expression 2	Σ
Expression 3	Σ

Small Report



Consumables × Expression 1 ×

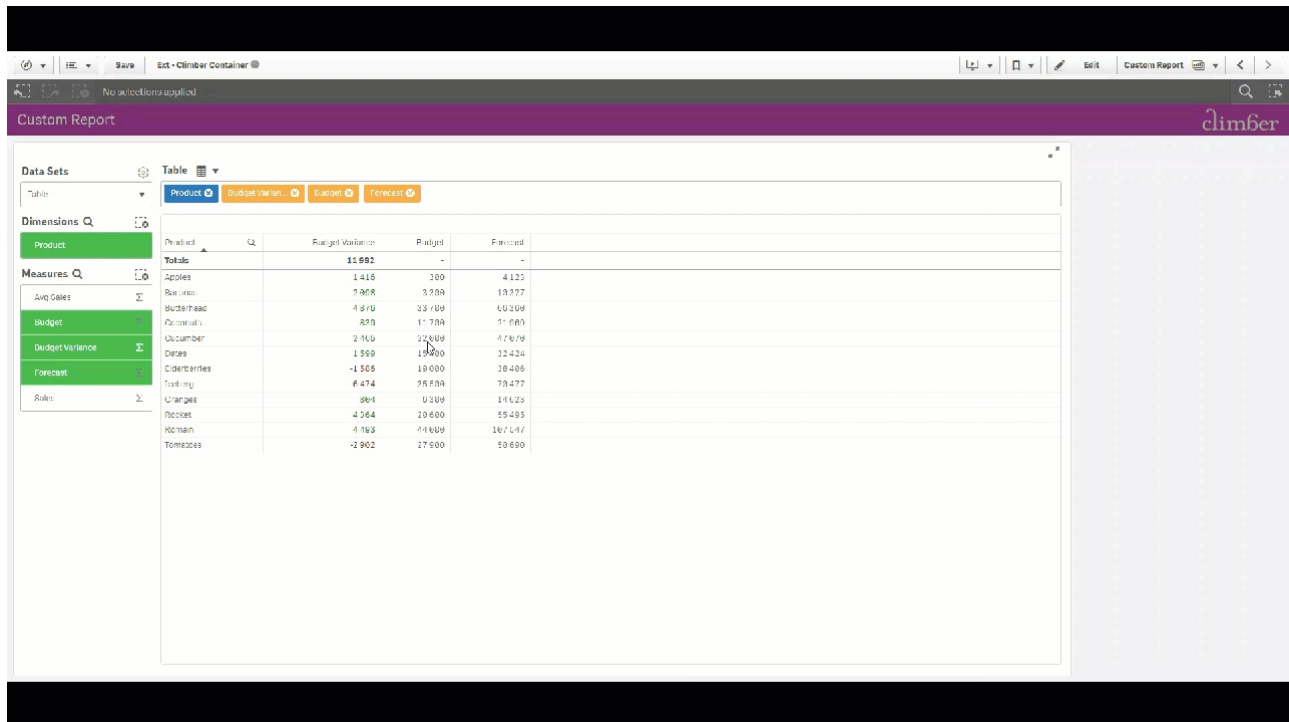
Consumables 🔍	Expression 1
Totals	264253
Apples	6917
Bananas	20116
Coconuts	35394
Dates	54933
Elderberries	65874
Figs	81019

6 rows exported.

Copy table to clipboard

## Export to new application

It is possible to export the current state of a selected data set to a new application. In the new application, master items will be created from your dimension and measures. In Qlik Sense Enterprise the user need to have security rights to create an app for the feature to work. For June 2018 and later releases the new app will open in "Generate Insights"-mode that suggest charts based on the data.



The screenshot displays the Qlik Sense Custom Report interface. The top navigation bar includes 'Save', 'Exit - Climbier Container', and 'Custom Report'. The main area shows a table with columns: Product, Budget Variance, Budget, and Forecast. The table is filtered by 'Product' and 'Budget Variance'. The data is organized into a hierarchy with 'Total' at the top, followed by 'Apples', 'Bananas', 'Grapes', 'Oranges', 'Pears', 'Plums', 'Raspberries', 'Strawberries', 'Tangerines', 'Uglifruit', 'Watermelon', and 'Zucchini'. The 'Budget Variance' column shows values for each product, and the 'Budget' and 'Forecast' columns show corresponding values.

Product	Budget Variance	Budget	Forecast
Total	11 692	-	-
Apples	1 415	300	4 125
Bananas	9 808	3 300	10 557
Grapes	4 219	33 400	40 300
Oranges	870	11 700	51 000
Pears	2 410	22 400	47 400
Plums	1 590	19 000	32 424
Raspberries	-1 505	19 000	30 400
Strawberries	6 474	36 700	70 477
Tangerines	804	0 300	14 620
Uglifruit	4 264	10 600	55 400
Watermelon	4 193	44 600	167 447
Zucchini	-2 902	27 500	50 600

## Export to new application using a template (Custom Report+)

To enable this feature, Enable export to template features in the experimental settings (Settings\Experimental Settings).

## Installation

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1. Download the latest version of Qlik Sense (QS November 2017 or higher)
2. Qlik Sense Desktop
  - To install, copy all files in the .zip file to folder "C:\Users\[%Username%]\Documents\Qlik\Sense\Extensions\cl-customreport"
3. Qlik Sense Server
  - See instructions [how to import an extension on Qlik Sense Server](http://help.qlik.com/en-US/sense/Subsystems/ManagementConsole/Content/import-extensions.htm) (<http://help.qlik.com/en-US/sense/Subsystems/ManagementConsole/Content/import-extensions.htm>)

## Limitations

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- Calculation conditions in master items are not respected
- Master measure/dimension colors only in Combo chart
- A very small (collapsed) version of the extension could look nicer :-)
- Export to template only works in Qlik Sense Enterprise
- Unpublished sheets in a published app can't use Bookmarks
- Expression labels doesn't work in Qlik Sense November 2017 or prior
- Expression labels only work for master measures/dimensions
- Step back/forward needs to be clicked twice if a measure/dimension is added/removed (only Custom Report+)
- Export to image/pdf in QAP only exports the table/pivot/combo visualization
- Export to image/pdf, when used in a Climber Container+, only exports the table/pivot/combo visualization

## Recommended Versions

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Qlik Sense Version	Recommended
February 2018	2.6.1
November 2018	2.6.1
September 2018	2.6.1
June 2018	2.6.1

April 2018	<i>2.6.1</i>
February 2018	<i>2.6.1</i>
November 2017	<i>2.6.1</i>
September 2017	<i>2.6.1</i>



# Climber Extensions

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Like this extension? Check out the other Climber extensions below or visit [climberextensions.com](http://www.climberextensions.com) (<http://www.climberextensions.com>) for more information about our extensions offerings.

## Finance Report (P&L)

- <https://www.youtube.com/watch?v=xOfShi94T4k>  
(No free version available, only on subscription.)

## Container

- <https://github.com/ClimberAB/ClimberContainer>

## Selection Bar

- <https://github.com/ClimberAB/ClimberSelectionBar>
- <https://www.youtube.com/watch?v=4fxrphADRKw>

## KPI

- <https://github.com/ClimberAB/ClimberKPI>
- <https://www.youtube.com/watch?v=9zdfYshNel4>

## Cards

- <https://github.com/ClimberAB/ClimberCards>
- [https://www.youtube.com/watch?v=k\\_IEt8TvB\\_c](https://www.youtube.com/watch?v=k_IEt8TvB_c)

## Climber

- <http://github.com/ClimberAB>

# Change Log

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## 2.6.1 - 2019-03-11

---

### Fixed

- ES-11497 Alert variable already exists

## 2.6.0 - 2019-02-21

---

### Added

- Support for February 2019
- Copy cell to clipboard
- QAP export to image/pdf

### Added (Plus-version)

- Copy table to clipboard
- Added dimensions are added as rows
- Override for Include null values in Pivot table

### Fixed

- ES-10058 Deferred state reverts when sorting
- ES-9963 Show Details expanded / Hide fields/Sort bar doesn't persist
- Column widths not persisted in state

## 2.5.0 - 2018-12-03

---

### Added

- Support for November 2018
- Bundle information

### Added (Plus-version)

- Export to image/pdf/ppt
- Snapshot

### Fixed

- ES-10495 & ES-10494 Combochart state undefined
- Alternative state tab in property panel November 2018 and later

### Removed (Free-version)

- Export data

## 2.4.4 - 2018-10-28

---

### Fixed

- Export data 'Invalid parameter' issue September 2017
- License for plus and normal versions.

## 2.4.3 - 2018-09-29

---

### Fixed

- Added Code Change Warning
- Fixed #74 Climber Icon

## 2.4.2 - 2018-09-20

---

### Fixed (Plus-version)

- Add lint to CircleCi
- Possible fix ES-9371
- Fixed ES-9905 Master Item description on title hover
- Fixed ES-9720 export from Mashup proxy prefix replace
- Fixed IE export and render problem

## 2.4.1 - 2018-09-06

---

### Fixed (Plus-version)

- Fixed ES-9720 Combo chart doesn't render if previous state exist

## 2.4.0 - 2018-08-30

---

### Added

- Show details

- Hide data sets
- Hide visualization settings
- Hide export to app
- Hide export data
- Hide visibility fields and sortbar
- Hide switch data sets
- Hide add/remove items
- Icons option for changing visualization types

### **Added (Plus-version)**

- Show data labels Combo chart
- Show data points Combo chart
- Sort dimensions/measures Combo chart
- Sort dimensions Pivot table

### **Changed**

- Totals on as default
- Reorganized settings in property panel

### **Fixed**

- Perfect scrollbar bug
- Fixed Export to app, fields with dangling spaces.

## **2.3.0 - 2018-08-02**

---

### **Added (Plus-version)**

- Defer layout update (experimental feature)

### **Changed**

- Climber Custom Report and Custom Report+ releases are from now on synced
- Disable Use expression labels in QS Nov 2017 and prior

### **Fixed**

- Selections drop with large apps
- qColumnOrder property sync issue
- Reflow issue and CSS improvements (Firefox)

## Fixed (Plus-version)

- Step back/forward issue

## 2.2.1 - 2018-07-18

---

### Fixed

- Source on Github out of sync with release

## 2.2.0 - 2018-07-18

---

### Fixed

- Issues introduced with 2.1.2 and 2.1.3

## 2.1.3 - 2018-07-13

---

### Fixed

- Fixed parameters for pivot table and combochart for before april 2018 versions. (Plus-version)
- Corrected timeout parameter.
- Fixed expression labels don't show as default when upgrading from 1.3.x to 2.x, even though property is set to false.

## 2.1.2 - 2018-07-11

---

### Fixed

- Fixed patch timeout for dimension och measure selections.
- Hotfix for export url in mashup environments.

## 2.1.1 - 2018-06-29

---

## Fixed

- Fixed swaping columns
- Fixed Export title name

## 2.1.0 - 2018-06-21

---

### Added

- Use expression labels option
- Option to sort selected items first, default value true
- Context menu include zero values
- Custom Export data dialog, that works in a mashup

### Changed

- Export to new app goes to insights mode if June 2018 or later
- Improved error message on export to app

## Fixed

- Export to new app/template for values sometimes is exported as NaN
- Export to new app/template dual fields with spaces
- Works with QS June 2018
- Fix selections after search
- Improved clean up.
- Overflow caused by textarea

## 2.0.3 - 2018-05-24

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### Fixed

- Can be used in a Container extension like Climber Container.

## 2.0.2 - 2018-05-07

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### Changed

- Sums on/off
- Search dimensions/measures
- Clear all dimensions/measures
- Export to app
- Hide/Show sort bar
- Respect zero value settings in master table
- One default state per data set (previously one per custom report object)
- Remember column width within a session
- Updated license

## 2.6.1 - 2019-03-11

---

### Fixed

- ES-11497 Alert variable already exists

## 2.6.0 - 2019-02-21

---

### Added

- Support for February 2019
- Copy cell to clipboard
- QAP export to image/pdf

### Added (Plus-version)

- Copy table to clipboard
- Added dimensions are added as rows
- Override for Include null values in Pivot table

### Fixed

- ES-10058 Deferred state reverts when sorting
- ES-9963 Show Details expanded / Hide fields/Sort bar doesn't persist
- Column widths not persisted in state

## 2.5.0 - 2018-12-03

---

## Added

- Support for November 2018
- Bundle information

## Added (Plus-version)

- Export to image/pdf/ppt
- Snapshot

## Fixed

- ES-10495 & ES-10494 Combochart state undefined
- Alternative state tab in property panel November 2018 and later

## Removed (Free-version)

- Export data

## 2.4.4 - 2018-10-28

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### Fixed

- Export data 'Invalid parameter' issue September 2017
- License for plus and normal versions.

## 2.4.3 - 2018-09-29

---

### Fixed

- Added Code Change Warning
- Fixed #74 Climber Icon

## 2.4.2 - 2018-09-20

---

### Fixed (Plus-version)

- Add lint to CircleCi
- Possible fix ES-9371



- Fixed ES-9905 Master Item description on title hover
- Fixed ES-9720 export from Mashup proxy prefix replace
- Fixed IE export and render problem

## 2.4.1 - 2018-09-06

---

### Fixed (Plus-version)

- Fixed ES-9720 Combo chart doesn't render if previous state exist

## 2.4.0 - 2018-08-30

---

### Added

- Show details
- Hide data sets
- Hide visualization settings
- Hide export to app
- Hide export data
- Hide visibility fields and sortbar
- Hide switch data sets
- Hide add/remove items
- Icons option for changing visualization types

### Added (Plus-version)

- Show data labels Combo chart
- Show data points Combo chart
- Sort dimensions/measures Combo chart
- Sort dimensions Pivot table

### Changed

- Totals on as default
- Reorganized settings in property panel

### Fixed

- Perfect scrollbar bug
- Fixed Export to app, fields with dangling spaces.

## 2.3.0 - 2018-08-02

---

### Added (Plus-version)

- Defer layout update (experimental feature)

### Changed

- Climber Custom Report and Custom Report+ releases are from now on synced
- Disable Use expression labels in QS Nov 2017 and prior

### Fixed

- Selections drop with large apps
- qColumnOrder property sync issue
- Reflow issue and CSS improvements (Firefox)

### Fixed (Plus-version)

- Step back/forward issue

## 2.2.1 - 2018-07-18

---

### Fixed

- Source on Github out of sync with release

## 2.2.0 - 2018-07-18

---

### Fixed

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## 2.1.3 - 2018-07-13

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## 2.1.2 - 2018-07-11

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### Fixed

- Fixed patch timeout for dimension och measure selections.
- Hotfix for export url in mashup environments.

## 2.1.1 - 2018-06-29

---

### Fixed

- Fixed swaping columns
- Fixed Export title name

## 2.1.0 - 2018-06-21

---

### Added

- Use expression labels option
- Option to sort selected items first, default value true
- Context menu include zero values
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### Fixed

- Export to new app/template for values sometimes is exported as NaN
- Export to new app/template dual fields with spaces

- Works with QS June 2018
- Fix selections after search
- Improved clean up.
- Overflow caused by textarea

## 2.0.3 - 2018-05-24

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### Fixed

- Can be used in a Container extension like Climber Container.

## 2.0.2 - 2018-05-07

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### Changed

- Sums on/off
- Search dimensions/measures
- Clear all dimensions/measures
- Export to app
- Hide/Show sort bar
- Respect zero value settings in master table
- One default state per data set (previously one per custom report object)
- Remember column width within a session
- Updated license

## License

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See [LICENSE \(License.pdf\)](#)