TRACELINK UNIVERSITY

View reports and dashboards

This topic describes the steps required to view reports and dashboards and change how the data in the reports and dashboards is displayed.

View reports and dashboards in a solution

View reports and dashboards

1. If you have access to multiple companies, make sure you have the correct company selected in the TraceLink Account menu.
2. Select the Main Menu icon.
3. Select My Networks or Partner Networks depending on the desired network.
4. Select a Network in the header.
5. Select a Partner or Location (e.g. your entire company or a Link to a specific Partner or internal location) in the header.
6. Select the Go button.

   The screen refreshes and displays the solution for the selected Network and Partner or Location.
7. Locate the name of the desired report or dashboard in the solution's side menu.

8. Select the report or dashboard.

   The report or dashboard displays in the main content area.

Tips

- If the desired report or dashboard does not appear in the side menu, then the user does not have a role with permission to open the report or dashboard. Contact an Administrator for assistance in being assigned the correct role.
- If the desired report or dashboard appears in the side menu, but no data displays in the main content area, then the user does not have a role with permission to view the data in the report or dashboard. Contact an Administrator for assistance in being assigned the correct role.

Search for and view reports and dashboards in OPUS Reports and Dashboards

Search for a report

1. Select the Main Menu icon.
2. Select Reports and Dashboards.
3. Select Reports in the side menu.
4. Select the desired catalog from the Reports drop-down:
   - Company – Contains reports that are tailored for a specific company.
   - Marketplace – Contains reports that are available across all companies and trade partners on the TraceLink network.
   - All – Contains all available reports.

   The screen refreshes and displays the Search Company, Search Marketplace, or Search All Reports table in the main content area, depending on the catalog selected.

5. Select the Filter button to search for a report.
6. In the Filters push panel, fill in one or more of the following fields to filter the results:
    - Report Name field – The name of the report.
    - Application Name drop-down – The name of the application (e.g. Multienterprise Information Network Tower).
    - Report Version Number field – The version number of the report.
    - State drop-down – The current state of the report:
        - Released – (default) Displays reports in the Released state.
        - Edit – Displays reports in the Edit state.
    - Is Latest drop-down – The version of the report to be displayed:
        - True – (default) Displays only the latest version of the report.
        - False – Displays all versions of the report.
7. Select Apply.

   The Filters panel closes and the main content area displays the results according to filters applied by the user. The applied filters appear above the results table in chips.

Tips

- To remove a filter, select the Close button in the chip containing the filter.
- To remove all filters, select Clear All.

Search for a dashboard

1. Select the Main Menu icon.
2. Select Reports and Dashboards.
3. Select Dashboards in the side menu.
4. Select one of the desired catalog from the Dashboards drop-down:
    - Company – Contains dashboards that are tailored for a specific company.
    - Marketplace – Contains dashboards that are available across all

companies and trade partners on the Tracelink network.
    - All – Contains all available dashboards.

The screen refreshes and displays the Search Company, Search Marketplace, or All Dashboards table in the main content area, depending on the catalog selected.

5. Select the Filter button to search for a dashboard.
6. In the Filters push panel, fill in one or more of the following fields to filter the results:
    - Dashboard Name field – The name of the dashboard.
    - Dashboard Version Number field – The version number of the dashboard.
    - State drop-down – The current state of the dashboard:
        - Released – (default) Displays dashboards in the Released state.
        - Edit – Displays dasboards in the Edit state.
    - Is Latest drop-down – The version of the dashboard to be displayed:
        - True – (default) Displays only the latest version of the dashboard.
        - False – Displays all versions of the dashboard.
7. Select Apply.

The Filters panel closes and the main content area displays the results according to filters applied by the user. The applied filters appear above the results table in chips.

Tips

- Select the [Report_Name] link available in each section of the dashboard to go to the specific report that the dashboard is derived from.
- To remove a filter, select the Close button in the chip containing the filter.
- To remove all filters, select Clear All.

View a report

1. Select the Main Menu icon.
2. Select Reports and Dashboards.
3. Select Reports in the side menu.
4. Select the desired catalog from the Reports drop-down:
    - Company – Contains reports that are tailored for a specific company.
    - Marketplace – Contains reports that are available across all companies and trade partners on the Tracelink network.
    - All – Contains all available reports.

    The screen refreshes and displays the Search Company, Search Marketplace, or Search All Reports table in the main content area, depending on the catalog selected.
5. Select the hyperlink in the Report Name column to open the report.

    The report displays in the main content area.

Tips

- A report cannot be placed on a dashboard until the report is Released (i.e. the report must not be in Edit status in a workflow).

Filter data in a report

Filter process network and partners

In the report, select the Filter button to choose the Process Network and Partners from the push panel:

- Process Network drop-down – A list of Process Networks the user has access to. If the user does not have access to the Process Network, then the filter pre-populates with the first Process Network brought back in the results.

- Partners drop-down – A list of partners based on the selected Process Network. Defaults to All Partners. If the user does not have access to the Process Network, partner data will not be displayed.

Modify report definitions to customize report displays

When viewing a report in Reports and Dashboards, the main content area of the screen displays the Report Definition, which outlines the structure and layout of how the report is presented within the main content area of a solution. The Report Definition layout includes Columns, Filter Columns, and Compute Columns available as tabs on the right side along with filter and sort options in each column header.

 Filters applied in Report Builder are saved with the report. Users can override these filters until the report is marked Released. Once included in a solution, users can adjust filters for viewing purposes, but cannot save their changes.

The following capabilities are available to users for customizing and interacting with the report display.

Function	Description
Filter data based on values in a column	Filter data using the text box at the top of each column by entering a string to match values in that column. The table refreshes dynamically to display matching results. Alternatively, select Filter Columns tab in the Report Definition to enter search terms to narrow the list of selectable values, then select or deselect specific entries as needed. • To match an exact value in a column, enter the value in the text box at the top of the column. • To define a conditional statement that specifies a range of values to display: 1. Either select the filter button at the top of the column or select Filter Columns tab in the Report Definition and select the column. 2. Select the condition for the statement. Possible values are: ■ Contains (text, numerical, date) ■ Does not contain (text, numerical, date) ■ Equals (text, numerical, date) ■ Does not equal (text, numerical, date) ■ Begins with (text, numerical) ■ Ends with (text, numerical) ■ Blank (text, numerical, date) ■ Not blank (text, numerical, date) 3. Enter the values for the conditional statement. 4. If necessary, add additional conditions by selecting either the And or Or radio button and define the additional condition in the following format: [condition 1] [Val1] [AND / OR] [Val2] [condition2] The report dynamically updates based on the contents of the filters. Select the Reset button to restore the filter to its original condition.
Sort columns	Sort the contents of the report based on the data in a column in ascending or descending order. The data is unsorted by default. Based on the data type of the column, sorting in ascending order organizes the data as follows: • Date – Newest date at the top, oldest date at the bottom. • Text – Alphabetical, with A at the top and Z at the bottom. • Numerical – Largest number at the top, smallest at the bottom. Based on the data type of the column, sorting in descending order organizes the data as follows: • Date – Oldest date at the top, newest date at the bottom. • Text – Alphabetical, with Z at the top and A at the bottom. • Numerical – Smallest number at the top, largest at the bottom. Sort the data through any of the following methods: • Selecting the column name: ◦ If the column is unsorted, select the column name to sort in ascending order. ◦ If the column is sorted in ascending order, select the column name to sort in descending order. ◦ If the column is sorted in descending order, select the column name to restore the data to be unsorted. • Selecting the kebab at the top of the column: ◦ If the column is unsorted, select the kebab and select either Sort Ascending or Sort Descending. ◦ If the column is sorted, select the kebab and either select the opposite of the current sort (e.g. if the data is in ascending order, select Sort Descending) or Clear Sort.

Function	Description
Group By (Row)	Group the results in the table by one or more rows using the following methods: • Select Columns tab in the Report Definition and drag the column to the Row Groups field. • Select the kebab at the top of the column and select Group by [Column Name]. If more than one column is grouped, they can be reordered by selecting Columns tab in the Report Definition and dragging the columns in the Row Groups field. Columns are grouped from highest priority to lowest. Remove a column from the group using one of the following methods: • Select Columns tab in the Report Definition and either drag the column out of the Row Groups field or select the Remove ⊗ button. • Select the Remove ⊗ button in the chip at the top of the Report Definition that contains the name of the column. Remove all columns from the group by selecting the kebab next to the Group column and selecting Un-Group All.
Pivot Mode	Enable pivot mode on the report by selecting Columns tab in the Report Definition and selecting the Pivot Mode switch. Pivot mode allows users to take column values and convert them into columns. Multiple columns can be used to create a nested pivot table.  A nested pivot table uses another pivot table as its data source. This layered structure enables multi-level data analysis, allowing users to summarize results at a higher level and then drill into more granular insights. In Pivot Mode: • The user cannot navigate through individual rows of data. • Only grouped rows (Group By) are displayed. • The table shows the total number of records per group for each pivot column value. • If no Group By value is selected, the table remains blank and only displays the pivot column headers. • Turning off Pivot Mode reverts the table to its original view.
Values	For both Pivot Mode and Group By, the user can surface values for columns by dragging the column name into the “Values” section in the Columns tab of the Report Definition. In Group By and Pivot Mode: • Only columns with unique values that can be displayed at the highest level of grouping will be shown. • Text and date values are not supported. • Numerical values are supported, as they can be aggregated (e.g. summed) across all records within a group.

Function	Description
Computed Columns	Computed Columns tab enables users to define custom metrics that are not directly available in the source data by performing calculations such as sum, average, or difference on existing columns. Users can create computed columns using data from existing columns. To create a computed column, drag an existing column (including a computed column) into the editing area, select an operator, and if required, select a second column. When the first column selected is of type Number, the resulting operation varies depending on the data type of the second input. The supported operator behaviors include: • “+” with String concatenates the numeric value from the first column with the string from the second column, producing a String output. • “+” with Number adds the two numeric values together, resulting in a Number output. • “+” with Date adds the number of days (from the number) to the date, producing a Date output. • “-” with Number subtracts the second numeric value from the first, resulting in a Number output. • “-” with Date subtracts the number of days (from the number) from the date, producing a Date output. • “*” multiplies the numeric value in the first column with either the second column value or an entered number, producing a Number output. • “/” divides the numeric value in the first column by the second column value or an entered number, producing a Number output. • “%” divides the numeric value in the first column by the second column value or an entered number and returns the result as a percentage. • “=” checks if the value in the first column equals the second column value or an entered number, returning True if they match and False if they do not. • “P” checks whether a value is present in the first column and returns True if present, otherwise False. When the first column selected is of type String, the following operator behaviors are supported depending on the type of the second value or column: • “+” with any type concatenates the string in the first column with the value in the second column, and the result is a String. • “=” checks if the string value in the first column matches the second column value or an entered string, returning True if they match and False if they do not. • “P” checks whether a value is present in the first column and returns True if present, otherwise False. If the first column used in the computation is of type Date, the available operations adapt based on the second input’s type, with some operators having date-specific behavior or constraints as described below: • “+” with String concatenates the date with the string from the second column, producing a String output. • “+” with Number adds the number of days from the second column to the date, producing a Date output. • “+” with Date is not supported and will result in an invalid combination. • “-” with String is not supported and will result in an invalid combination. • “-” with Number subtracts the number of days from the date, producing a Date output. • “-” with Date calculates the number of days between the two dates, producing a Number output. • “W” converts the date to a week-of-year format ([xx]_[YYYY]) and stores it as a String in the computed column; no second column is allowed. • “M” converts the date to a month-year format ([xxx]_[YYYY]) and stores it as a String in the computed column; no second column is allowed. • “Y” extracts the year from the date and stores it in [YYYY] format as a String; no second column is allowed. • “=” checks if the date in the first column matches the value in the second column or an entered string, returning True if they match and False otherwise. • “P” checks whether a value is present in the date column and returns True if present, otherwise False.

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