TRACELINK UNIVERSITY

How-to videos

ORD Mini Videos

Watch short videos that demonstrate how to complete various tasks.

The user interface shown in the videos may differ from the current application interface due to product updates. For the latest instructions, refer to the documented procedures in this guide.

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Topic	Video	Description
Query Objects	**Search for a Query Object**	Search for a query object in the Company, Marketplace, or All catalog, filter the results, and clear the filters to start over.
	Create a Query Object (With One Primary & Multiple Secondary Business Objects)	Create a query object by selecting an application and a primary business object, then add secondary objects such as ASNs and invoices.
	Create a Query Object (With One Primary & Multiple Secondary and Tertiary Business Objects)	Create a query object by selecting an application and a primary business object, then add secondary and tertiary business objects so one report covers the full flow from purchase order to invoice.
	Copy a Marketplace and Company Query Object	Copy a query object from the Marketplace or Company Catalog, and save the copy to your Company Catalog to reuse or configure further to your needs.
	Modify a Query Object	Open a query object in Edit state, and update its business objects and fields before you release it.
	Release a Query Object	Move a query object from Edit to Released state so report authors can use it.
	Create a New Version of a Query Object	Create a new version of a released query object to add or change fields without affecting reports that use the current version.
Reports - Author Mode	**Navigate and Filter a Report**	Switch between the Company and Marketplace tabs, and filter reports by name, application, version, or state to find the one you need.
	Copy a Report in the Company Catalog	Copy a Company or Marketplace report, rename it, and save it to your Company Catalog with the same configuration.
	Create a New Version of a Report	Create a new version of a released report that keeps all its settings, and make changes without affecting the version in use.
	Release a Report	Release a report to lock its criteria, columns, and grid setup for report users.
Report Criteria	**Modify Report Criteria**	Open the report criteria panel to select process networks and partners, add filters, and choose which columns the report shows.
	Add Column Mapper	Match related line items across business objects with Column Mapper, apply AND and OR rules, and see why some rows don't appear.

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Topic	Video	Description
Building the Report (Author Mode) (AG-Grid)	**Create a New Report**	Create a report by filling general fields and selecting a query object.
	Sort Columns in a Report	Sort report columns in ascending or descending order, and hold down Shift to sort by more than one column at a time.
	Apply Filters in a Report	Filter report columns by text, number, or date, and combine conditions with AND or OR logic in a single filter.
	Use Aggregation in Reports	Add aggregations such as sum, average, or count to report columns, and view totals at each group level.
	Work with Pivot Mode	Turn ON Pivot Mode to show column values as separate columns, and review its requirements, limitations, and performance tips.
	Rename Columns in a Report	Replace technical column headers with clear labels that apply only to the current report.
	Filter and Limit Rows in a Report	Use Filter Rows to control which records appear when you combine business objects, and compare the Ignore Blanks and Evaluate Blanks options.
	Drill-Down to a Business Object from a Report	Open the full business object page, such as a purchase order, in a new tab directly from a report row.
Reports - Consumer Mode	**Perform Basic Report Operations in Consumer Mode**	Open Company and Marketplace reports as a report user, and apply runtime filters and columns without changing the saved report.
Dashboards - Author Mode	**Dashboard Basics**	Open a dashboard, switch between chart and table views, and find the options to edit it.
	Search for a Dashboard	Search for Company and Marketplace dashboards, filter the results, and open a dashboard to view its content.
	Copy a Marketplace and Company Dashboard	Copy a Company or Marketplace dashboard, and save the copy to your Company Catalog to reuse or customize.
	Create a New Version of a Dashboard	Create a new version of a released dashboard to make changes without affecting the version in use.
	Create a New Dashboard	Create a dashboard, add a report to the section, display it as a chart, and save it.
	Configure Sections and layouts in a Dashboard	Add sections to a dashboard, choose a column layout for each, and place reports in them.
	Configure Chart Settings and Download a Chart	Choose a chart type, set its categories and series, customize its titles and legends, and download it as a PNG image.
	Configure Dashboard Filters and Release a Dashboard	Add process network, partner, and other filters to a dashboard, and release it so report users can access it.

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Topic	Video	Description
Dashboards - Consumer Mode	**Use Dashboard Features in Consumer Mode**	View a dashboard as a report user, and switch tiles between chart and table views to see summary or detailed data.

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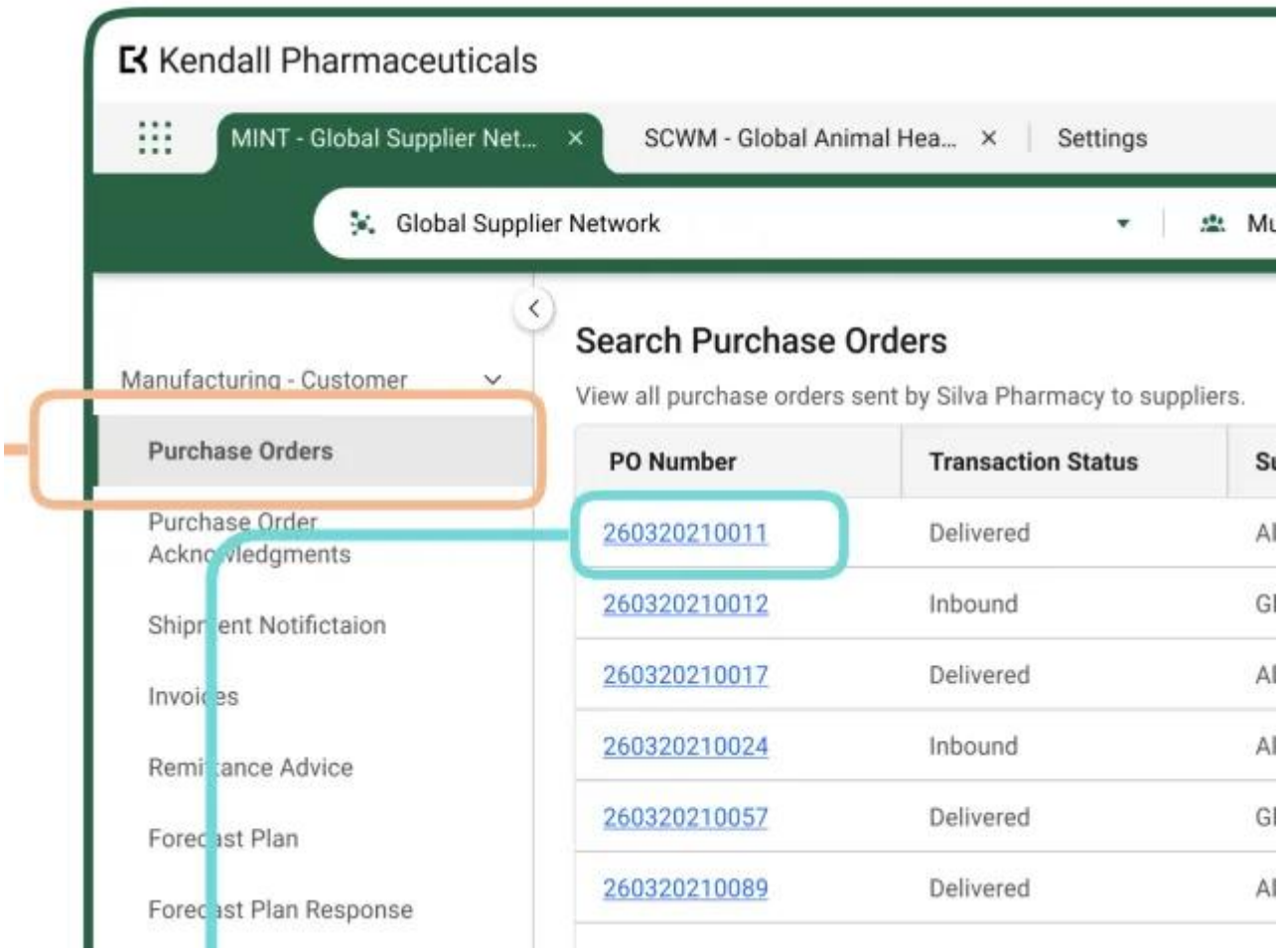
Related Content



Understanding Page Types within the OPUS Solution Environment (OSE)

Page types enable Solution Designers to efficiently create user-friendly pages using a drag-and-drop interface, allowing them to organize information for optimal usability.
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UX Writing and Terminology

The goal is to create UI text that is clear and concise, offering users the essential information they need to effectively complete their tasks.
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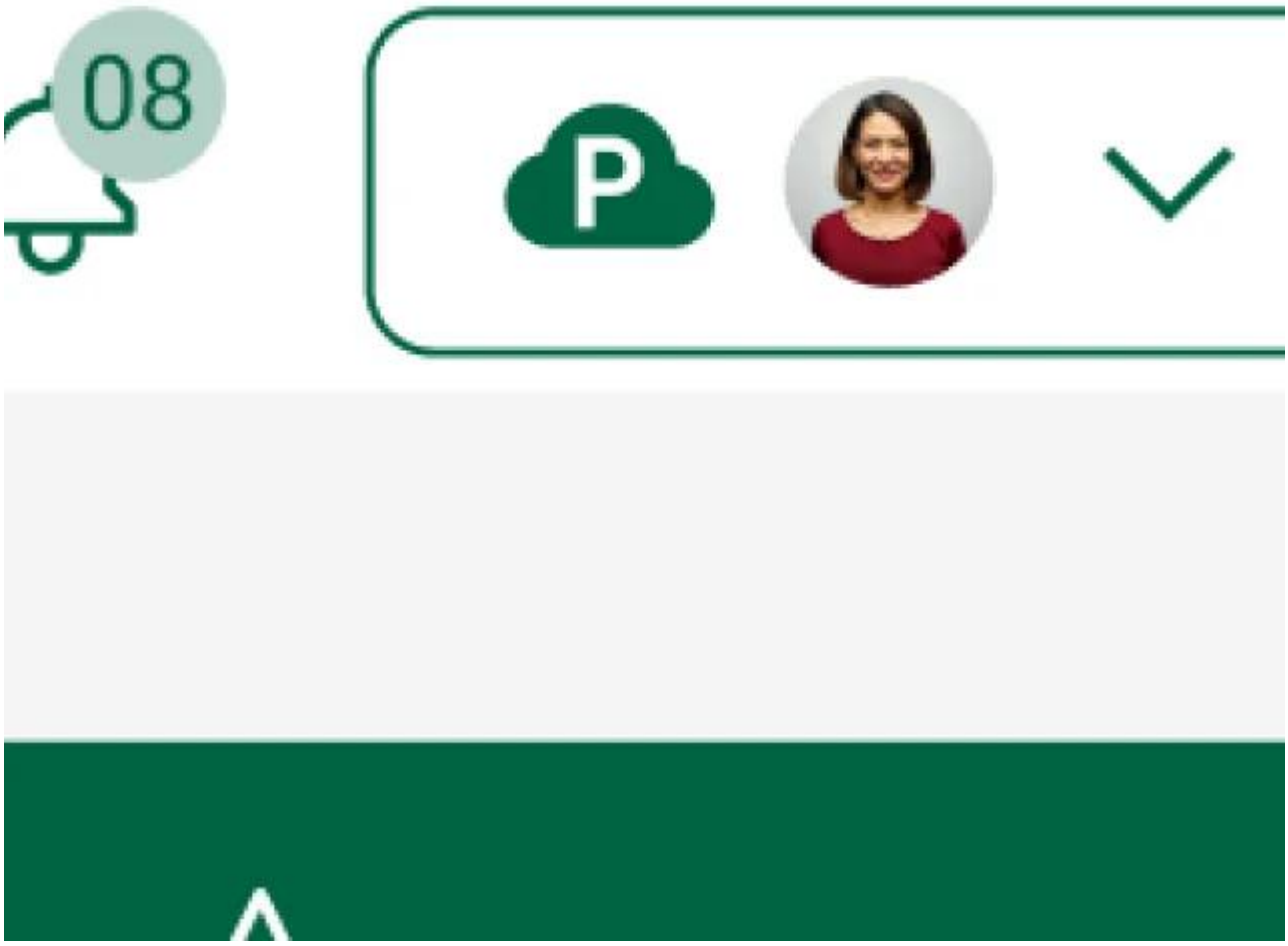

Introducing OPUS Ensemble

TraceLink's OPUS Ensemble, the first next-generation solution on the OPUS Platform, revolutionizes user interaction by seamlessly integrating personalized settings, powerful navigation, and company-specific context for efficient access to notifications, support, and essential tools.

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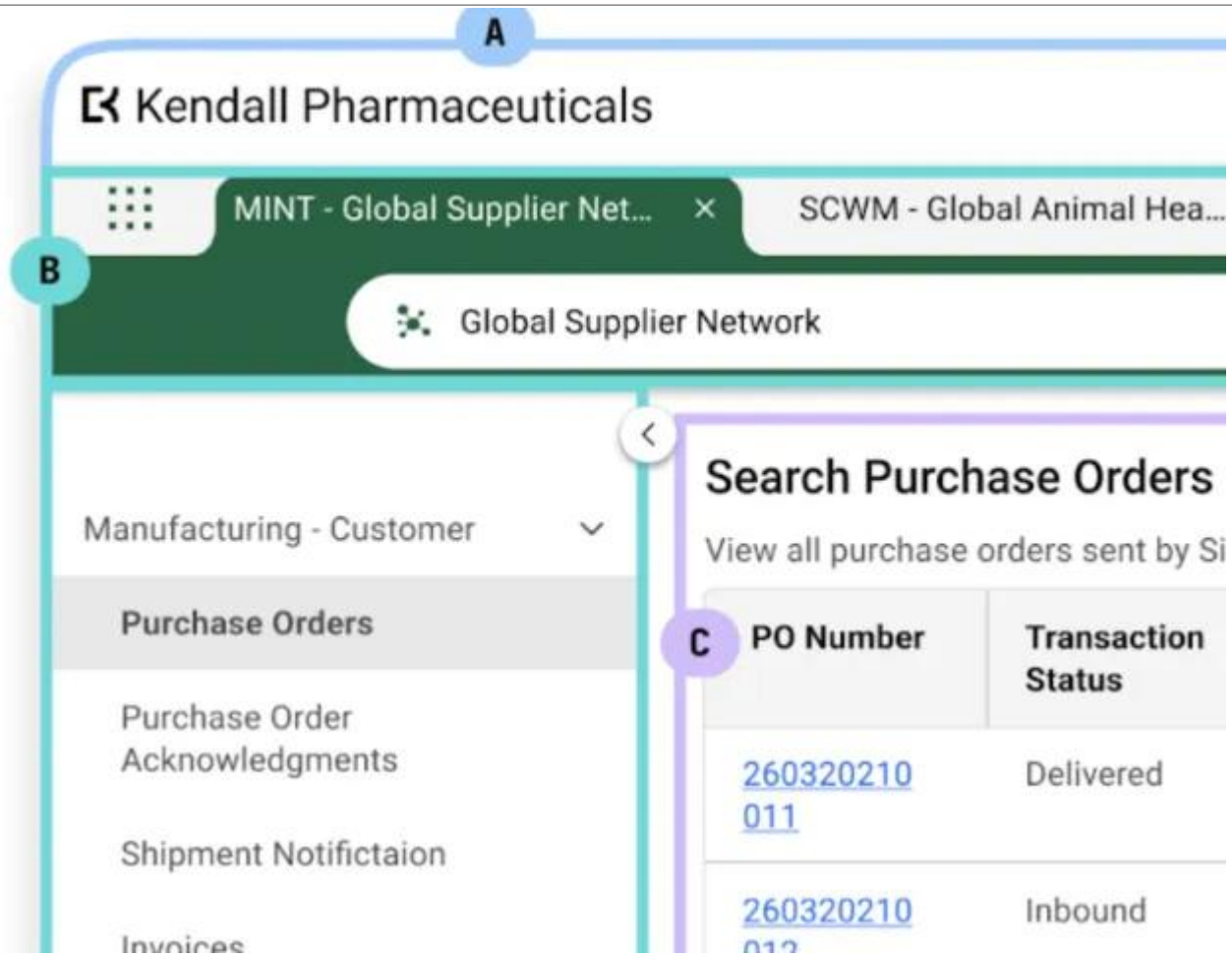

OPUS Ensemble Patterns

Enabling OPUS Solution Designers to understand Ensemble patterns, which includes user context, settings, and browser-style navigation for streamlined access.
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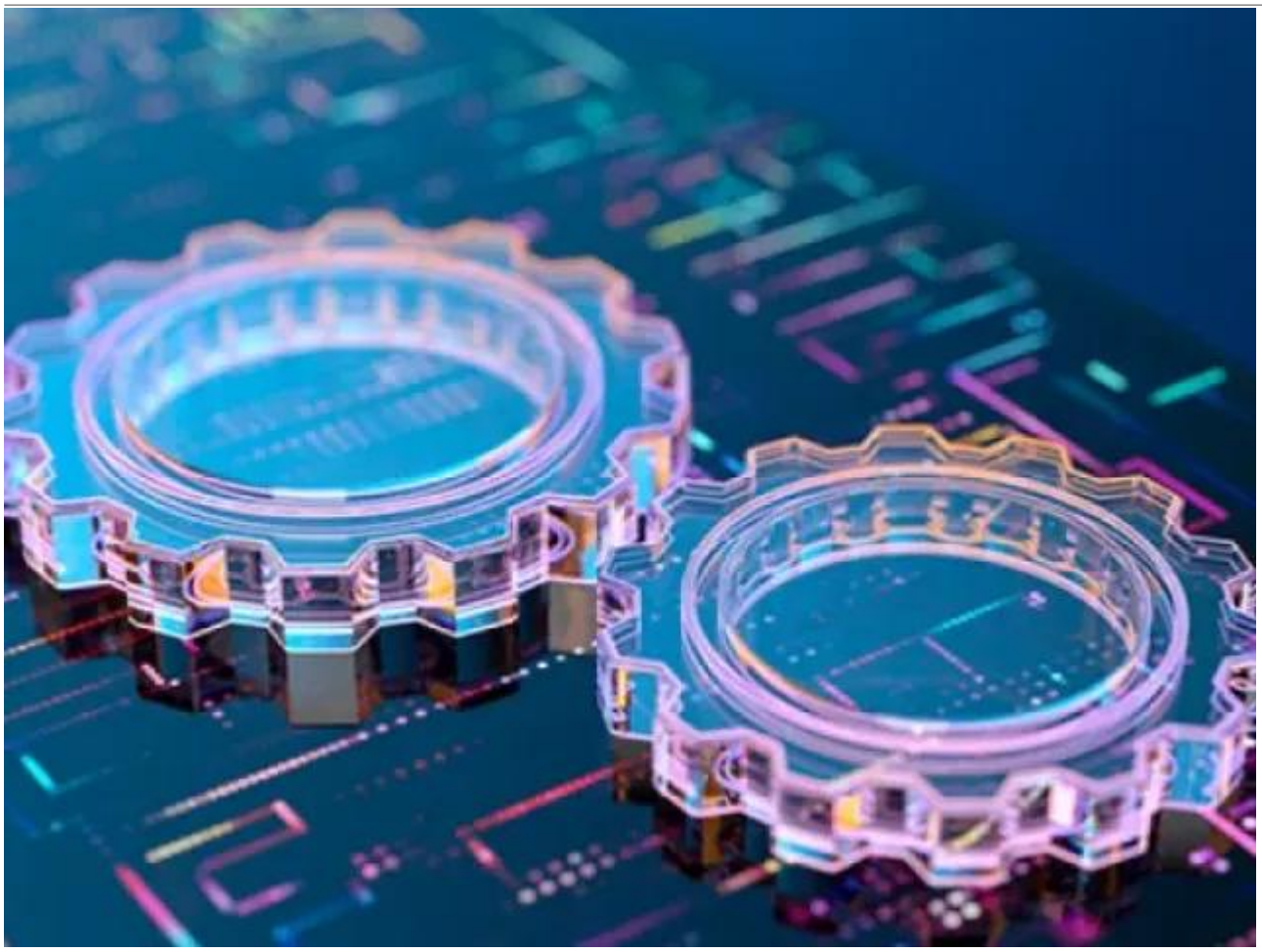

Define and Design Search Pages

Search pages enable users to view, search for, and create new object instances, typically serving as the landing page when navigating to a solution, except when only one instance exists (like the Profile page in Settings), in which case the user is directed to the View/Edit page.

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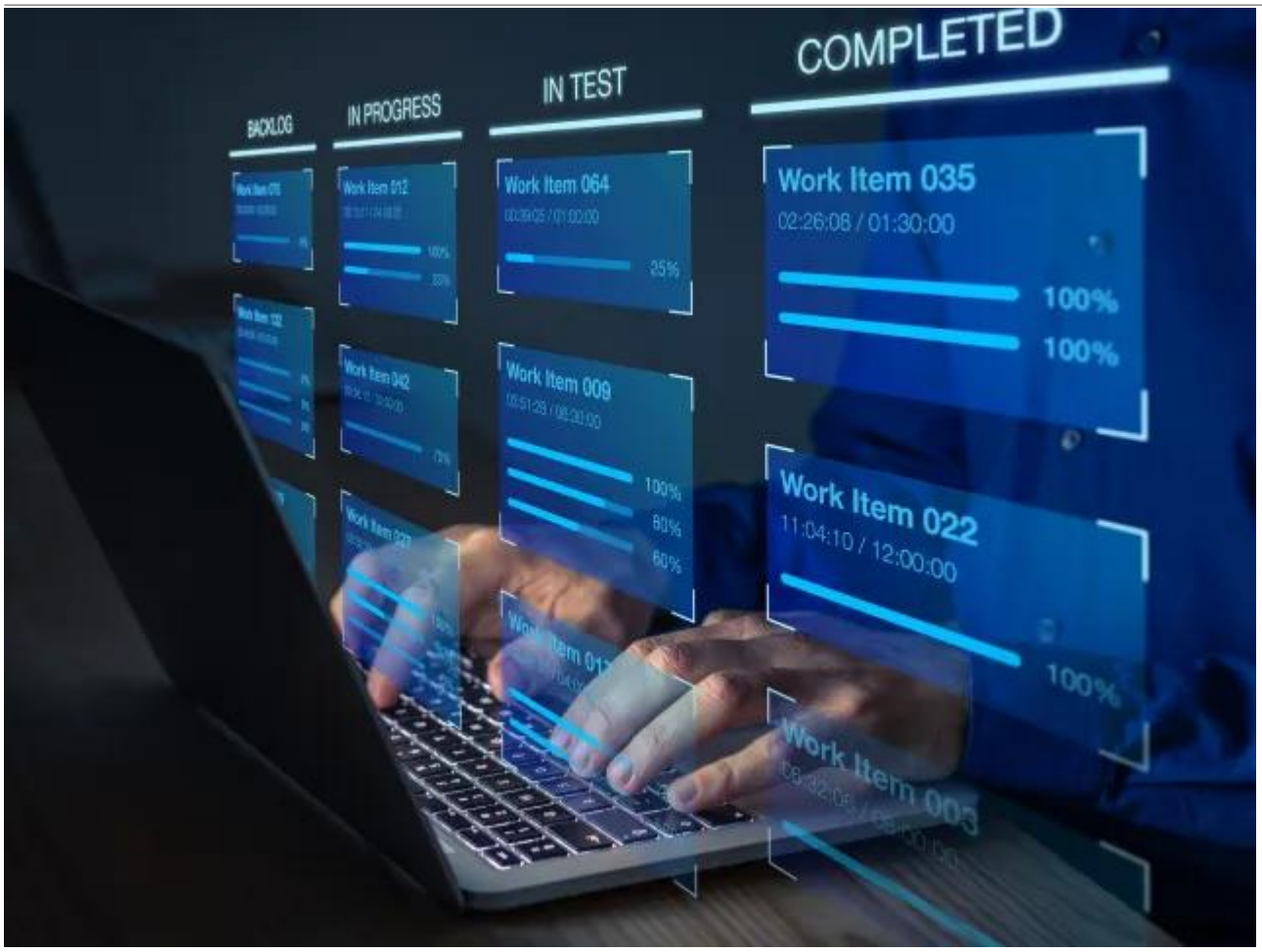

Define and Design Workflows

This guidance outlines essential practices for designing effective workflows that enhance efficiency and flexibility in business processes, focusing on primary objects to help OPUS Solution Designers create impactful solutions.

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