TRACELINK UNIVERSITY

Create and manage query objects

A Query Object is a critical component in OPUS Reports and Dashboards (ORD) that defines how data is retrieved from the underlying database. It serves as a blueprint for generating datasets that can be utilized in reports and dashboards. Query objects can be created from scratch or copied from the marketplace, allowing users to tailor their data retrieval processes to meet specific reporting needs. A query object can include a primary object and one or more related secondary, tertiary, or quaternary objects. Define these relationships once and reuse them across multiple reports.

This topic describes the steps required to create, save, and modify query objects.

Search for and view an existing query object

Search for a query object

1. Select the Main Menu icon.
2. Select Reports and Dashboards.
3. Select Query Objects in the side menu.
4. Select the desired catalog from the Query Objects drop-down:

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- Company – Contains query objects that are tailored for a specific company.
- Marketplace – Contains query objects that are available across all companies and trade partners on the TraceLink network.
- All – Contains all Company and Marketplace query objects.

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

5. Select the Filter button to search for a query object.
6. In the Filters push panel, fill in one or more of the following fields to filter the results:
   - Application Name drop-down – The name of the application (e.g. Multienterprise Information Network Tower).
   - Query Object Name field – The name of the query object.
   - Primary Object field – The name of the main entity selected by Report Designers when creating a query object.
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

- If the desired query object appears in the side menu, but no data displays in the main content area, then the user does not have a role for the specific application. Contact an Administrator for assistance in being assigned the correct role.

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

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View all versions of a query object

Users can retrieve the latest version of an object or view all available versions of a specific object.

1. Select the Main Menu icon.
2. Select Reports and Dashboards.
3. Select Query Objects in the side menu.
4. Select the Company catalog from the menu items.

   The screen refreshes and displays the query objects in the main content area.

5. Select the desired query object row in the search results table.
6. Select the Navigate to Query Object Version Search Page button.

   A new tab opens and displays the Company Query Object Version Search Page in the main content area.

Tips

- Review the object relationships or update them as needed. When finished, move the query object to the Released state so it can be used to create reports.
- To remove a filter, select the Close button in the chip containing the filter.
- To remove all filters, select Clear All.

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Copy a marketplace query object

A Marketplace query object can be duplicated and modified to meet specific requirements. The existing structure and logic serve as a foundation for creating a customized query object that supports project-specific reporting needs.

Copy a query object

1. Select the Main Menu  icon.
2. Select Reports and Dashboards.
3. Select Query Objects in the side menu.
4. Select the Marketplace catalog from the menu items.

   The screen refreshes and displays the query objects in the main content area. By default, the page is sorted to include query objects that are Released and with the latest version.

5. Select the Filter button to search for a query object.
6. In the Filters push panel, fill in one or more of the following fields to filter the results:
   - Application Name drop-down – The name of the application (e.g. Multienterprise Information Network Tower).
   - Query Object Name field – The name of the query object.
   - Primary Object field – The main object targeted for eventually building out a 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.

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8. Select the desired query object row in the search results table.

9. Select the Copy button on the Operations toolbar.

10. Select the Company option from the Catalog Type drop-down in the Copy push panel.

11. Enter a name in the Query Object Name field that clearly identifies the application and purpose.

12. Select Apply.

    The new query object is created in the Company catalog and opens in the Edit state.

Tips

- Review the object relationships or update them as needed. When finished, move the query object to the Released state so it can be used to create reports.
- To remove a filter, select the Close button in the chip containing the filter.
- To remove all filters, select Clear All.

Create and modify query objects

Create a query object

1. Select the Main Menu  icon.

2. Select Reports and Dashboards.

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3. Select Query Objects in the side menu.
4. Select the Company catalog from the Query Objects drop-down.
5. Select the New button.
6. Fill in the following fields in the General section:
    - Query Object Name field – Enter a query object name.
    - Application Name drop-down – Select the relevant application.
    - Description field – Enter a description (optional).
    - Primary Business Object drop-down – Select the business object for which to view data.
    - Catalog Type drop-down – By default, Company catalog is selected.

     Users can add an SQL statement in the Lakehouse Query section only when the Application Name is selected as Track and Trace Lakehouse. Also, the Relationship section does not apply to Lakehouse Query Objects.
7. Add the SQL Statement in the Lakehouse Query section.

    For more information on Lakehouse query object, see Frequently Asked Questions (FAQs)
8. Select the Add + icon in the Relationship section.
9. Select a value from the Secondary Business Object drop-down.

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10. Select the Save button.

    The query object is created and saved in the Company catalog.

For more information about creating an SQL Statement, see the Create Reports Using SQL in the Track and Trace Lakehouse Help Center.

Tips

- Select the Application Name value before selecting the Primary Business Object, as no options are available until an application is selected.
- Enter a descriptive value in the Description field to help other users understand the query object's purpose.
- Select the Primary Business Object value before selecting a Secondary Business Object, as no options are available until the primary object is defined.
- Add Secondary Business Object values only when additional related data is required for reporting.
- Select Secondary Business Object values in sequence, as each level depends on the previous selection.
- Limit the number of Business Object values to only what is necessary to avoid unnecessary complexity in the query.
- Review object relationships after configuration to ensure the query object

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returns accurate and relevant data.

Modify an existing query object (Edit state only)

1. Select the Main Menu icon.
2. Select Reports and Dashboards.
3. Select Query Objects in the side menu.
4. Select the Company catalog from the Query Objects drop-down.
5. Select the Query Object name link in the search results table.

   The screen refreshes and displays the View and Edit Query Objects screen in the main content area.
6. Select the Edit button.
7. Update the desired fields in the General section:

   - Query Object Name field – Update the query object name.
   - Application Name drop-down – Select the relevant application.
   - Description field – Update the description (optional).
   - Primary Business Object drop-down – Select the business object for which to view data.
   - Catalog Type drop-down – By default, Company catalog is selected.

     Users can add an SQL statement in the Lakehouse Query section

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only when the Application Name is selected as Track and Trace Lakehouse. Also, the Relationship section does not apply to Lakehouse Query Objects.

8. Add the SQL Statement in the Lakehouse Query section.

   For more information on Lakehouse query object, see Frequently Asked Questions (FAQs)

9. Select the Add + icon in the Relationship section.

10. Select a value from the Secondary Business Object drop-down.

11. Select the Save button.

    The query object is updated and saved in the Company catalog.

For more information about creating an SQL Statement, see the Create Reports Using SQL in the Track and Trace Lakehouse Help Center.

Tips

- Select the Application Name value before selecting the Primary Business Object, as no options are available until an application is selected.
- Enter a descriptive value in the Description field to help other users understand the query object's purpose.
- Select the Primary Business Object value before selecting a Secondary

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Business Object, as no options are available until the primary object is defined.

- Add Secondary Business Object values only when additional related data is required for reporting.
- Select Secondary Business Object values in sequence, as each level depends on the previous selection.
- Limit the number of Business Object values to only what is necessary to avoid unnecessary complexity in the query.
- Review object relationships after configuration to ensure the query object returns accurate and relevant data.

Related Content



Create and manage dashboards

Dashboards are used to bring together data from one or more reports into a single, consolidated view.
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