TRACELINK UNIVERSITY

Create and manage reports

Reports are used to present data from a query object in a structured, interactive format for analysis. A report is always based on a single query object, which defines the available data, while the report determines how that data is displayed and organized.

Reports allow users to refine and analyze data by applying criteria such as process network, partners, date ranges, and columns. They also support interactive actions such as filtering, sorting, and grouping, and can be reused across dashboards to ensure consistent data and reporting.

This topic describes the steps required to create and modify reports.

For instructions on how to add a report to a company solution, see the Tracelink.com.

Copy a marketplace report

The Marketplace catalog provides predefined reports for immediate use. These reports can be used to address common use cases without manual configuration.

Copy a report

1. Select the Main Menu icon.

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2. Select Reports and Dashboards.
3. Select Reports in the side menu.
4. Select the Marketplace catalog from the menu items.

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

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).
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.

8. Select the desired report 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 New Report Name field that clearly identifies the application and purpose.

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12. Select Apply.

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

Tips

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

- A similar operation can be used to copy a company report (Edit and Released state)

View all versions of a report

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 Reports in the side menu.
4. Select the Company catalog from the menu items.

   The screen refreshes and displays the reports in the main content area.

5. Select the desired report row in the search results table.

6. Click the Go To drop-down. Select Navigate to Report Version Search Page button.

   A new tab opens and displays the Company Report Versions Search Page in the main content area.

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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 a company report

Create a report

1. Select the Main Menu icon.
2. Select Reports and Dashboards.
3. Select Reports in the side menu.
4. Select the Company catalog from the Reports drop-down.
5. Select the New button.
6. Fill in the following fields in the General section:
    - Report Name field – Enter a report name.
    - Query Object Name drop-down – Select the relevant Query Object from the drop-down list.
    - Description field – Enter a description (optional).
    - Latest Query Object Version switch – Turn this option to Yes to use the latest Query Object version.

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- Query Object Version drop-down – Select the specific Query Object from the drop-down list.

- Catalog Type drop-down – By default, Company catalog is selected.

7. Select the Save button.

   A new report and report version are created in the Company catalog with the workflow state set to Edit. The Edit page for the report is displayed.

Tips

- Select the New button in the New Report page to clear all entered values and reset the page while updating report details.

Create a new report version

1. Select the Main Menu icon.

2. Select Reports and Dashboards.

3. Select Reports in the side menu.
4. Select the Company catalog from the Reports drop-down.
5. Select the report to version.
6. Select the New Version button.

7. In the New Version panel, review the report details.

8. Select the Apply button.

   A new report version is created in the Company catalog with the version number incremented by 1.

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Tips

- New Version is available only when the selected report is the latest version and is in Released status. It is not available for reports in Edit status or for older report versions.

Filter a company report

1. Select the Main Menu icon.
2. Select Reports and Dashboards.
3. Select Reports in the side menu.
4. Select the Company catalog from the Reports drop-down.
5. Select Filter.
6. Enter or select one or more of the following criteria:
    - Report Name field: Enter part of the report name to perform a partial search.
    - Application Name field: Select one licensed application to view only the reports associated with that application.
7. Select the Apply button.

   The filter shows the matching reports.

Related Content

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Create and manage dashboards

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

View More

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.

View More

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