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# View reports and dashboards

Each solution provides its own set of reports and dashboards based on its functionality. To view documentation for available reports and dashboards, see the following Help Centers:

- Multienterprise Information Network Tower
- Process Orchestration for Empowered Teams
- US Compliance (FAQs > OPUS Reports and Dashboards (ORD) > What US Compliance reports are available in ORD? section)
- EdgeLink Intelligence (View reports and View 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.

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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 an application/orchestration specific role to view 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

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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).
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

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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.
7. Select Apply.

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

**Tips**

- For dashboards that are in Released state, 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**

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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**

- Dashboards can be saved with reports in the Edit state, but dashboards cannot be released until all associated reports are in the Released state.
- Right-click on any row to open a context menu.

  Select Go to [Name of Business Object] to open the corresponding business object in a new user journey tab.

### View dashboards

1. Select the Main Menu icon.
2. Select Reports and Dashboards.

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3. Select Dashboards in the side menu.
4. Select 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 hyperlink in the Name column to open the desired dashboard.

    The dashboard displays in the main content area.

**Tips**

- Dashboards can be saved with reports in the Edit state, but dashboards cannot be released until all associated reports are in the Released state.

## 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:

1. 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.
2. Partners drop-down – A list of partners based on the selected Process

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Network. Defaults to All Partners. If the user does not have access to the Process Network, partner data will not be displayed.

## Modify report criteria to customize report displays

When viewing a report, the main content area displays the Report Criteria, which defines the structure and layout of the report within the solution. The Report Criteria layout includes tabs for Columns, Filter Columns, Compute Columns, and Filter Rows on the right side. Each column header also provides filter and sort options, allowing you to modify and customize how the report is displayed.

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

### Filter using the Filter Columns tab

1. Select the Filter Columns tab.
2. Select a column.
3. Select a condition:
    - Contains – Matches partial values (text, numerical, date).
    - Does not contain – Excludes matching values (text, numerical, date).
    - Equals – Matches exact values (text, numerical, date).
    - Does not equal – Excludes exact matches (text, numerical, date).
    - Begins with – Matches starting text (text, numerical).

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- Ends with – Matches ending text (text, numerical).
- Blank – Matches empty values (text, numerical, date).
- Not blank – Matches non-empty values (text, numerical, date).

4. Enter a value in the Filter field.

   The report updates dynamically.

### Modify column display and order

Update the display name of a column to make it more user-friendly.

1. Select the Actions icon in the column header.
2. Enter a desired name for the column in the Rename field.
3. Select icon to apply the changes.

Renaming a column updates only the display name in the report and does not change the underlying field name.

- Drag the column header to reposition the column in the report table based on your requirement.

### Apply multiple conditions

1. Select the condition for the first statement.

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2. Enter a value.

3. Select the condition for the first statement.

4. Enter a value.

   **Format**: [Condition 1] [Value 1] AND/OR [Condition 2] [Value 2]

#### Filter using the column header

Enter a value in the filter field at the top of a column.

The report updates dynamically.

### Advanced filtering options

- Limit Rows switch – Restricts the number of rows returned after all other filters, grouping, and sorting have been applied. Group or sort the data and then apply the limit to view only the most recent or highest-priority entries per group or across the entire report.

  **Example**: Limit Rows = 10 (To display the top 10 records)

  For more information about Limit Rows, see the What is the Limit Rows filter and when should it be used? FAQ topic.

- Filter Rows switch – Applies row-level filtering after column filters.

- Evaluate Blanks switch – Includes blank values in evaluation.

- Reset – Clears all filters.

#### Use Column Mapper

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Use the Column Mapper section in the Report Criteria to associate related columns before generating the report.

1. Select the Column Mapper section.

2. Define one or more mapping sets using selected columns.

For more information about Column Mapper, see the What is Column Mapper and when should it be used? FAQ topic.

### Sort data in a report

Sorting organizes report data based on column values.

**Sort using a column header**

- First selection → Sort Ascending
- Second selection → Sort Descending
- Third selection → Remove sorting

**Sort using column options**

1. Select the Actions ⋮ icon in the column header.

2. Select one of the following:

    - Sort Ascending – Sorts values based on column type.
    - Sort Descending – Reverses the sort order.

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- Clear Sort – Removes sorting.

### Sorting behavior

- Date – Sorted by chronological order.
- Text – Sorted alphabetically.
- Number – Sorted by numeric value.

## Group data by rows

Grouping organizes data into hierarchical rows based on selected columns.

### Group using column options

1. Select the Actions icon in the column header.
2. Select Group by [Column Name].

The report displays grouped rows.

### Group using the Columns tab

1. Select the Columns tab.
2. Drag a column to the Row Groups field.

### Group by multiple columns

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- Drag additional columns to the Row Groups section.
- Columns are grouped from highest to lowest priority based on order.

### Remove grouping

Use one of the following:

- Select the Remove button in the Row Groups section.
- Select the Remove button in the grouping chip.
- Select the Actions icon in the column header and then select Un-Group All.

### Grouping behavior

- Grouped tables display a percentage column.
- Percentage represents each group relative to total rows.

## Use pivot mode

Pivot mode transforms row-based data into a column-based layout for comparison.

### Enable pivot mode

1. Select the Columns tab.
2. Enable the Pivot Mode switch.

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The report updates to display pivoted data.

### Configure pivot

- Drag a column to the pivot section.
- Multiple columns can be used to create nested pivot tables.

 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.

### Pivot behavior

- Only grouped rows (Group By) are displayed.
- Row-level navigation is not available.
- Record counts are displayed per group.
- Turning the Pivot Mode switch off reverts the table to its original view.

If no Group By value is selected:

- The table remains blank.
- Only column headers are displayed.

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## Use values

Values define how data is displayed in grouped or pivot reports.

### Add values

1. Select the Columns tab.
2. Drag a column to the Values section.

### Value behavior

- Only columns with values that can be displayed at the grouping level are shown.
- Numerical values are supported and aggregated.
- Text and date values are not supported.

## Create computed columns

Computed columns define custom metrics using existing fields.

### Create an expression

1. Select the Compute Columns tab.
2. Drag a column into the editing area.
3. Select an operator.

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4. Select a second column or enter a value (if required).

### Computed column behavior

- Computation is performed row by row.
- Available operators depend on the data type of the first column.
- Invalid combinations may not be selectable.

#### Computed column operators

Operators define how values are calculated.

### Number-based operators

- + – Adds values

  **Example**: 100 + 20 → 120

- - – Subtracts values

  **Example**: 100 - 80 → 20

- * – Multiplies values

  **Example**: 10 × 5 → 50

- / – Divides values

  **Example**: 100 ÷ 10 → 10

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- % – Calculates percentage

  **Example**: 80 % 100 → 80%

- = – Compares values

  **Example**: 100 = 100 → True

- P – Checks if a value exists

### String-based operators

- + – Concatenates values

  **Example**: Purchase + Order → PurchaseOrder

- = – Compares values

  **Example**: Purchase = Purchase → True

- P – Checks if a value exists

### Date-based operators

- + – Adds days

  **Example**: Jan 1 + 5 → Jan 6

- - – Calculates difference

  **Example**: Jan 10 - Jan 1 → 9 days

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- W – Converts to week format

  **Example**: Jan 15 → 03_2027

- M – Converts to month format

  **Example**: Jan → Jan_2027

- Y – Extracts year

  **Example**: Jan 2027 → 2027

## Interact with dashboard data

### Filter process network and partners

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

1. 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.

2. 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.

3. Additional filters (if available).

### Update visualizations

1. Select the Chart icon to display data as a chart.

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2. Select the Table icon to display data in tabular format.

### Adjust chart display

1. Select the Actions icon in the chart.
2. Select the Edit Chart icon.
3. Modify chart settings:
    - Chart (e.g. Column, Bar, Pie)
    - Set Up (Categories, Series)
    - Customize (Chart Style, Titles, Legend, Series)
4. Select Advanced Settings for enabling Animation, duration of the animation, Navigator, Crosshair, and so on.

The dashboard updates based on the selected configuration.

1. Select Download Chart to download a chart in PNG format.

**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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Reports are used to present data from a query object in a structured, interactive format for analysis.

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**Compliance Exception Reports**

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