NETWORK FOR GREATER GOOD

Configuring Reports and Dashboards for MINT



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Configuring Reports and Dashboards for MINT

Learning Objectives

At the end of this guide, you will be able to:

- Explain the MINT reporting architecture and the roles of ORD and OSE.
- Identify when to use standard, Marketplace, and company reports.
- Create and configure Query Objects, Reports, and Dashboards in OPUS Reports & Dashboards (ORD).
- Configure menus, pages, and roles for reporting solutions in OPUS Solution Environment (OSE).
- Validate, package, and release reporting configurations using the OSE lifecycle.
- Verify and troubleshoot reporting configurations before deployment.

Overview

Organizations use reports and dashboards to analyze operational data and monitor supply chain activities. MINT provides the business application where users access operational data, while OPUS Reports & Dashboards (ORD) is used to create reports and dashboards. OPUS Solution Environment (OSE) manages how those reporting assets are made available to users through menus, pages, and roles.

Prerequisites

Before you begin this course, you should complete the following recommended courses:

- OPUS Foundations
- MINT Foundation and Intermediate
- OSE Beginner and Intermediate
- ORD Beginner and Intermediate

These courses provide the foundational knowledge required to successfully configure Reports and Dashboards in MINT. After completing these courses, you should be familiar with:

- MINT solution configuration and core concepts
- OSE components, including workflows, pages, menus, and roles
- ORD concepts, including Query Objects, Reports, and Dashboards

This course builds on that knowledge and focuses on configuring Reports and Dashboards in MINT using ORD and managing their lifecycle through OSE.

By presenting data in a structured format, reports help users quickly identify trends, exceptions, and areas that require attention. This enables organizations to improve operational visibility and support better business decisions.

Understanding the MINT Reporting Architecture

Why Reporting Matters in MINT

Organizations generate large volumes of supply chain transaction data. Reports and dashboards help convert this data into meaningful business information that supports operational monitoring, compliance, and decision making.

Reports provide detailed operational information, while dashboards present important metrics visually to help users quickly identify trends and exceptions.

Reports support common business needs, including:

- Monitoring transaction status across the partner network.
- Tracking partner activity and service-level agreement (SLA) performance.
- Providing audit-ready data for compliance and reporting.
- Sharing operational insights with business stakeholders.

How MINT, OSE, and ORD Work Together

In this guide, you learn how to configure reports and dashboards for MINT using ORD. You also learn how to use OSE to manage report configurations, validate changes, and release reporting solutions in a controlled manner.

The MINT reporting is built on three integrated components that work together to deliver reporting capabilities:

- **MINT (Multienterprise Information Network Tower)** – The business application that stores and provides access to operational and transaction data.
- **OPUS Reports & Dashboards (ORD)** – The reporting tool used to create Query Objects, Reports, and Dashboards that transform MINT data into meaningful business insights.
- **OPUS Solution Environment (OSE)** – The configuration layer used to manage

reporting assets. It controls how reports and dashboards are deployed, including their menus, pages, roles, and lifecycle.

These components provide a structured framework for designing, managing, and deploying reporting solutions while ensuring consistency, governance, and controlled change management across the platform.

Standard Solution Overview

Using the MINT Standard Solutions

The MINT Standard Solution provides preconfigured components that are ready to use. These components are maintained by TraceLink and support common business requirements, reducing the need for custom configuration.

The standard solution includes:

- **Standard Menus** – Provide the navigation structure in MINT.
- **Standard Transactions** – Provide ready-to-use business transactions.
- **Standard Roles** – Control which users can access menus and transactions.

Before creating a custom reporting solution, check whether the required functionality is already available in the MINT Standard Solution. Using standard components reduces implementation effort and simplifies maintenance.

Accessing Standard Reports

When a reporting requirement exists, always verify whether a standard report already meets the business need. If a standard report exists, assign the appropriate user role to provide access.

Using standard reports minimizes customization and simplifies maintenance.

Understanding Report Types in MINT

Reports Overview

MINT provides three types of reports:

Standard Reports: This is a preconfigured report delivered as part of the standard MINT solution. You can use these reports when they already meet your business requirements and no customization is needed.

Marketplace Reports: This is a reusable report published in the Marketplace that can be copied into a company solution and customized to meet specific business requirements. You can use these reports when a suitable standard report is unavailable but an existing reusable report is available.

Company Reports: This is a custom report created to meet an organization's unique business requirements. These reports support company-specific fields, custom calculations, and specialized business logic.

To meet a reporting requirement, use the following approach:

1. Check whether a **Standard Report** meets the requirement.
2. If not, search for a suitable **Marketplace Report** that can be reused or customized.
3. Create a **Company Report** only when no existing report satisfies the requirement.

Using Standard Reports

To use a standard report, first confirm that the report is available in the MINT standard solution and identify the role required to access it. In the following example, the standard report is **Sent POs with and without Received PO Acknowledgement**, and the required role is **Manufacturing - Customer - Reports and Dashboards**.

Assign the Required Role

1. Log in to *opus.tracelink.com.*
2. Select **Administration** from the **Main Menu** .
3. In the side menu, select **Users** > **Network Members**.
4. Click **New**.
5. In the User Type section, select user as **Internal** from the User Type drop-down.
6. In the User Information section, fill in the following fields:
   - **User Name**: (Required) The name of the user. This field is enabled only when Internal user is selected in the User Type drop-down.
   - **Email**: (Required) The email address of the user to assign. The user must not already be registered on the TraceLink Network as member of another company. This field is enabled only when External user is selected in the User Type drop-down.
7. In the Network Information section, fill in the following fields:

   NOTE: For US Compliance, **Network Name** and **Link Name** fields are not applicable.

   - **Application**: (Required) Select **Multienterprise Information Network Tower**.
   - **Network Name**: Select your MINT Network.
   - **Link Name**: The name of the Link that defines the user's role in the network.
8. In the Roles section, select **Manufacturing - Customer - Reports and Dashboards**.
9. Click **Save**.

Verify Access to the Standard Report

1. Log out from *opus.tracelink.com.*
2. Log in to *opus.tracelink.com* so that the role changes take effect.
3. Select **My Networks** from the **Main Menu** .
4. Select the applicable MINT network from the drop-down.
5. Click GO.
6. In the side menu, select **Manufacturing Customer Reports**.
7. Select **Sent POs with and without Received PO Acknowledgement**.
8. Verify that the report opens and displays the expected data.

Using Marketplace Reports

Marketplace reports are reusable reports designed for common business requirements and published in the **Marketplace Catalog**. When a suitable standard report is not available, search the Marketplace before creating a new report. Reusing an existing Marketplace report reduces implementation effort and promotes consistency across solutions.

Marketplace reports cannot be used directly in MINT. To make a Marketplace report available to users, you must first copy it to the **Company Catalog**. After it is copied, the report becomes a **Company Report**, which can be configured, managed, and included in a company solution for user access.

Copy a Marketplace Report

Perform the following steps to copy a Marketplace report to the **Company Catalog**:

1. Log in to *opus.tracelink.com.*
2. Select **Reports and Dashboards** from the **Main Menu** .

3. In the side menu, select **Reports** > **Marketplace**.
4. Click **Filter**.
5. Enter the required search criteria, such as:
    - **Report Name**
    - **Application Name**
    - **Report Version**
    - **Is Latest**
    - **State**
6. Click **Apply** to display the matching reports.
7. Select the required Marketplace report.
8. Click **Copy**.
9. In the Copy Report window, specify the following:
    - **Catalog Type**: Company
    - **New Report Name**: Enter a unique report name.
10. Click **Apply**.
    The report is copied to the **Company Catalog** in the Edit state.

Release the Report

Before the report can be added to the MINT solution, move it to the appropriate state.

1. In the side menu, select **Reports** > **Company**.
2. Remove the **Released** filter to display reports in the Edit state.
3. Open the copied report.
4. Click **Move To**.
5. Save the report.
    The report is now available for configuration within the company solution.

Configuring Marketplace Reports in OSE

After copying a Marketplace report to the Company Catalog, the report is not immediately available to MINT users. To make the report accessible, you must configure the report in OPUS Solution Environment (OSE).

OSE is a no-code configuration environment that controls how users interact with a MINT solution. It allows Solution Designers to configure menus, pages, roles, workflows, business objects, and policies. For Marketplace reports, OSE determines where the report appears in MINT and which users can access it.

How OSE Connects Reports to MINT

OSE acts as the link between reports created in ORD and the MINT user interface. When a Marketplace report is copied into a company solution, OSE is used to:

- Add the report to the MINT navigation menu.
- Control where the report appears in the user interface.
- Grant access to authorized users through roles.

To make a Marketplace report available, configure the following OSE components:

- Menu – Provides a navigation path to the report.
- Role – Grants permission to view the report.

Both components must be configured before users can access the report from MINT.

Create a Menu Item for a Marketplace Report

1. Log in to *opus.tracelink.com.*
2. Select **OPUS Solution Environment** from the **Main Menu** .
3. In the side menu, select **Solution** > **Menus**.
4. Select the menu name link for desired MINT solution.
5. Click **Edit**.

6. In the Submenus and Menu Items section, select your custom submenu.
7. Select the **New Menu Item** icon.
8. Enter the required details:
    - **Name**
    - **Display Name**
    - **Target Page Type**
    - **Scope**
    - **Report Name**
9. Set **Use Latest** to **Yes**.
10. Click **Apply**.
11. Click **Save**.
12. Expand your custom submenu and confirm the new menu item that appears in the list.

Create a Custom Role for the Marketplace Report

Create a role to control which users can access the Marketplace report.

1. Select **OPUS Solution Environment** from the **Main Menu** .
2. In the side menu, select **Solution** > **Roles**.
3. From the Operations toolbar, click **New** to display the New Role page.
4. Complete the following fields for the new Role:
    - **Role Name**
    - **Role Display Name**

- **Solution**: Select your MINT Company Solution from the drop-down list.
- **Description** (Optional)

5. From the Operations toolbar, click **Save** to save the new **Role** and display the **Role** page in View mode.
6. Select the **Edit** button from the Operations toolbar to configure the Role.
   - Collapse the **Object Type Permissions** section.
   - Under the **Menu Permissions** section, expand the Menu collection to display Menu Item Names.
   - Select the desired menu item and then click the **Edit** from the Operations toolbar to open the **Edit Menu Item Permissions** push panel.
   - Toggle the **Grant Permissions** button to set the field value to **Permitted**.
   - Click **Apply** to save the configuration edits.
7. From the Operations toolbar, click **Save** to save the new **Role** and display the **Role** page in View mode.

Assign the Custom Role to a User

Assign the newly created role so the user can access the Marketplace report.

1. Log in to *opus.tracelink.com.*
2. Select **Administration** from the **Main Menu** .
3. In the side menu, select **Users** > **Network Members**.
4. Click **New**.
5. In the User Type section, select user as **Internal** from the User Type drop-down.
6. In the Username drop-down, select a user or start typing the user's name to display matching suggestions.

7. Under Network Information, select the application **Multienterprise Information Network Tower** and your network.
8. From the Roles drop-down, select the role.
9. Click **Save**.

Verify the Marketplace Report

1. Log out from *opus.tracelink.com.*
2. Log in to *opus.tracelink.com* so that the role changes take effect.
3. Select **My Networks** from the **Main Menu** .
4. Select network, from the **Network** drop-down list.
5. Click **GO**.
6. In the side menu, select newly created menu and submenu.
7. Verify that the report opens and displays the expected data.

Creating a Company Report

Create a company report when the required information is not available in either the **MINT Standard Solution** or the **Marketplace Catalog**. Company reports allow you to address organization-specific reporting requirements, such as custom fields, unique business rules, special calculations, or exception logic.

Unlike standard and marketplace reports, company reports are fully configurable. You can define the data to include, specify how it is presented, and determine how users interact with the report. Because creating a company report requires additional configuration and maintenance, use this option only when an existing report does not meet your business needs.

When you create a company report, you typically:

- Select a Query Object to define the report's data source.
- Define report criteria, such as process networks, partners, filters, and report columns.
- Configure how users view and analyze the report results.

Understanding Report Components

When you configure a report in ORD, you decide what data the report displays, how the information is presented, and how users interact with the results.

Every report begins with a Query Object, which provides the data source for the report. You then select the information that the report uses, including the process network, partners, filter columns, and the fields that you want to display.

You can also customize the appearance of the report by renaming columns, creating computed columns, mapping related data, and controlling which columns are visible to users.

After the report is created, users can interact with the report to analyze the data. Depending on the report configuration, users can:

- Sort data to organize results.
- Filter records to display relevant information.
- Group related records together.
- Aggregate values to create summaries.
- Use pivot tables to analyze data from different perspectives.

Dashboards

Understanding Dashboards

A dashboard combines information from multiple reports into a single, interactive view. Instead of opening individual reports, you can monitor key business information from one location. Dashboards transform report data into visual components, such as charts, tables, and summary cards, making it easier to identify trends, monitor performance, and recognize exceptions.

In the MINT reporting framework, dashboards are built using reports created in **OPUS Reports & Dashboards** (ORD). You can use dashboards to gain a consolidated view of your supply chain data and quickly access the information that supports business decisions.

Dashboards also provide interactive features that help you explore report data. You can apply filters, switch between different visualizations, and open related reports to view additional details. These capabilities allow you to analyze data more efficiently without navigating through multiple reports.

Benefits of Using Dashboards

- View information from multiple reports in a single location.
- Analyze data using charts, tables, and summary cards.
- Monitor business performance and identify exceptions quickly.
- Apply filters to focus on relevant information.
- Open related reports to investigate detailed data.

Creating a Dashboard from Reports

After creating the required reports, you can combine them into a dashboard to provide a single, interactive view of business information. Before creating a new dashboard, search the **Marketplace Catalog** to determine whether an existing dashboard meets your

reporting requirements. Reusing a Marketplace dashboard helps reduce development effort and promotes consistency across solutions.

If a suitable dashboard is not available, create a new dashboard in **OPUS Reports & Dashboards** (ORD). Add the required reports, configure the appropriate visualizations, and review the dashboard layout. After the dashboard is complete, save and release it so that it can be configured for use in the MINT solution.

The process for creating a dashboard includes the following activities:

- Search the **Marketplace Catalog** for an existing dashboard.
- Create a new dashboard if required.
- Set up the Dashboard, create new sections and add reports to the dashboard.
- Configure the dashboard layout and visualizations.
- Save and release the dashboard.