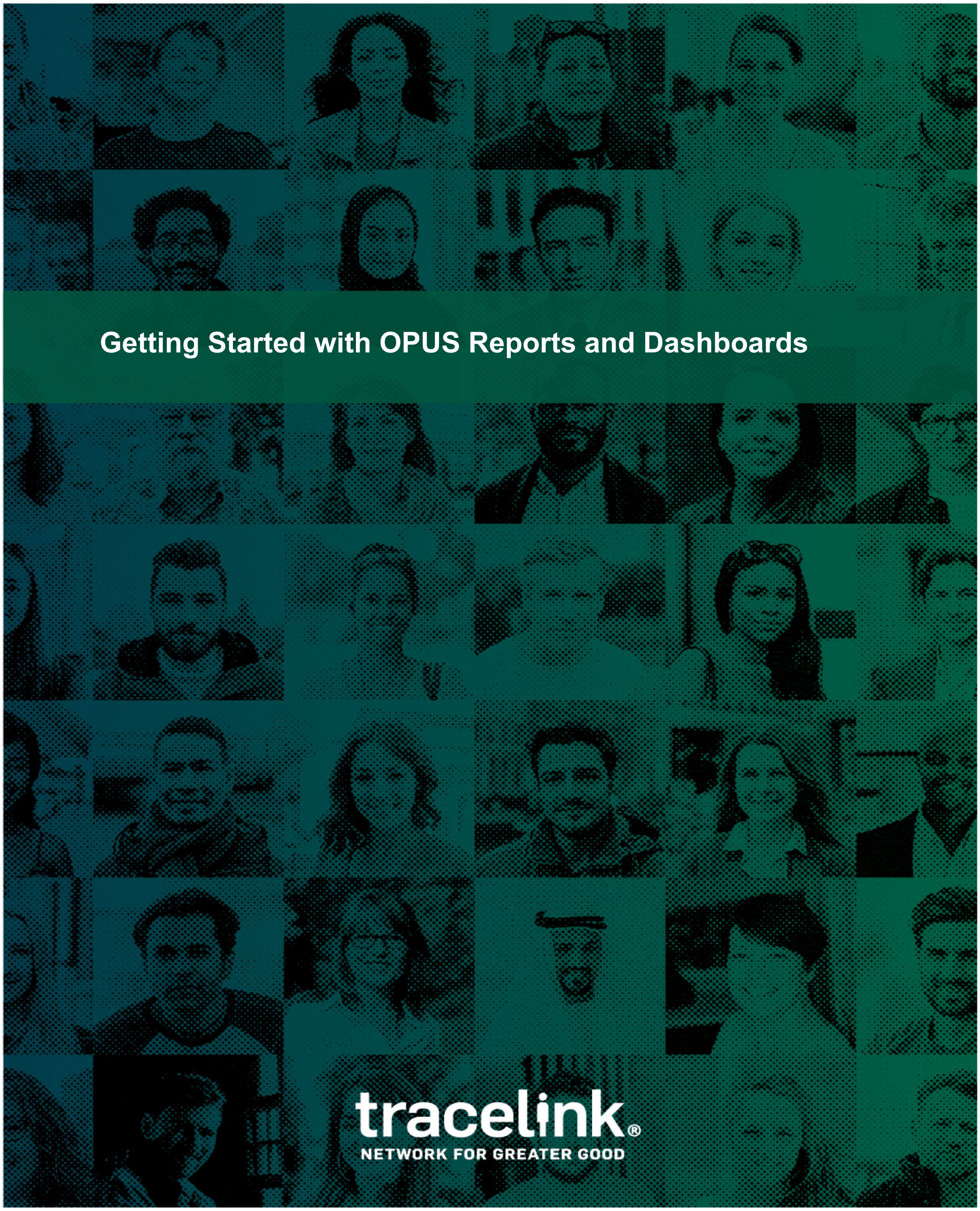
Getting Started with OPUS Reports and Dashboards



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Learning Objectives

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

- Explain what OPUS Reports and Dashboards (ORD) is and its capabilities.
- Describe the key components of ORD, Query Objects, Reports, and Dashboards and how they work together to transform the data from business objects into actionable insights.
- Identify different ORD personas and roles, and explain when each role is used.
- Find, search, and open Query Objects, Reports, and Dashboards in the ORD Marketplace and Company Catalog.
- Use Query Objects to define reusable data structures for reporting.
- Use marketplace reports and perform report operations.
- Build and release dashboards that combine multiple reports into a single, high-level visual view.

Introduction

OPUS Reports and Dashboards, or ORD, is a no-code reporting and visualization capability that runs on the OPUS platform. You use ORD to view supply chain transaction data in a clear, structured format so you can make informed decisions with confidence.

When you work in a multienterprise supply chain, critical data often comes from many partners and systems. ORD helps you bring this information together by organizing transactions such as purchase orders, acknowledgements, deliveries, inventory balances, and compliance data into consistent reports and dashboards.

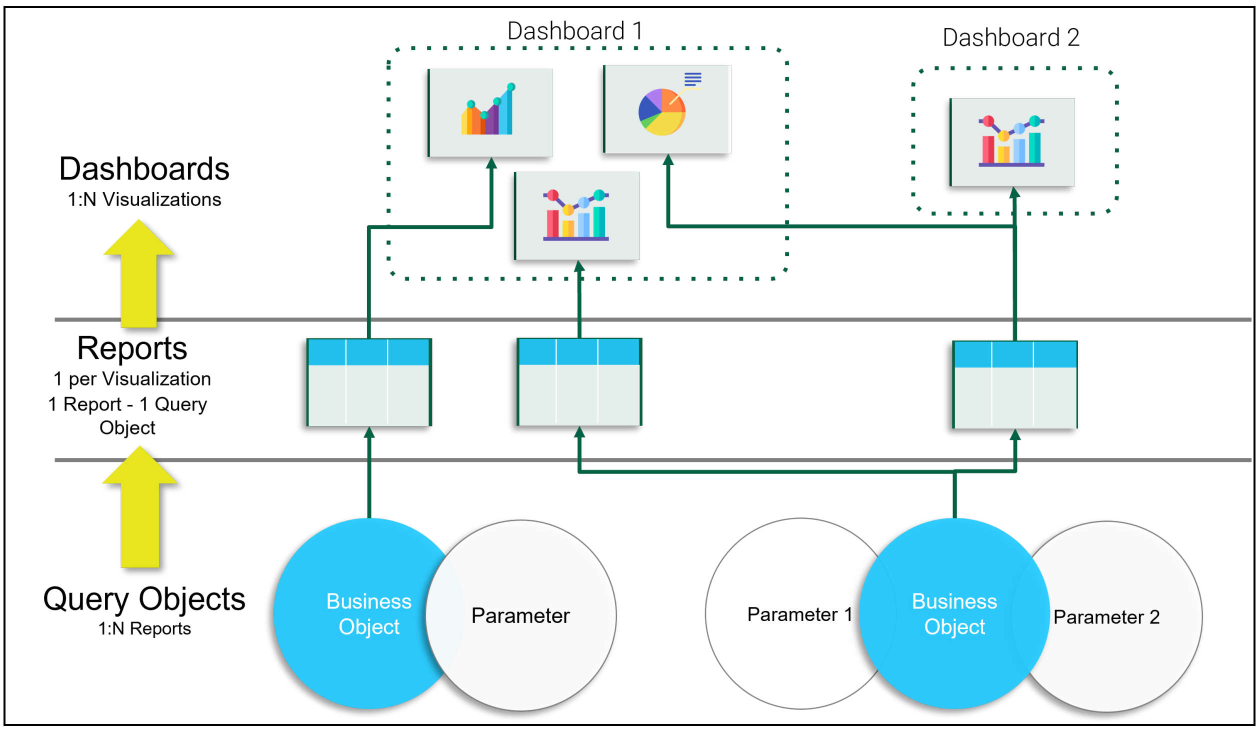
ORD is designed for you as a business user. You do not need technical skills or coding experience. You build reports and dashboards using a simple drag-and-drop interface that updates as you work, allowing you to clearly see how your data will be presented.

Prerequisite:

To successfully complete the exercises in this course, you must have authorized access to the relevant solution. For example, if you are training on US Compliance data, verify that you are a member of the US Compliance network with the appropriate roles assigned.

ORD Framework and Relationships

ORD Framework



The main components of ORD framework are as follows:

Business Objects: Business objects represent the transactions you want to analyze, such as purchase orders, acknowledgements, deliveries, inventory balances, or compliance records. When you decide what you want to see, you are really identifying the business objects involved.

Query Object: You use query objects to combine related business objects into a reusable structure. A query object can include a primary object and one or more related secondary, tertiary, or quaternary objects. You define these relationships once and reuse them to support multiple reports.

Report: Each report is built on a single query object. Reports present data in a structured, tabular format. You define criteria, select fields, and apply filters so the report returns only the data you need to analyze.

Dashboard: Dashboards combine one or more reports on a single page. You use dashboards to turn tables into visual elements, such as charts and summaries, so you can quickly understand performance and identify issues.

The flow remains the same every time. Business objects feed query objects, query objects power reports, and reports drive dashboards.

ORD Marketplace

The ORD Marketplace helps you get started quickly when you build your reports and dashboards in ORD. It provides pre-configured Query Objects, Reports, and Dashboards that support common business use cases.

Marketplace items are read-only. You cannot edit it directly. When you want to modify a marketplace Query Object, Report, or Dashboard, you copy it into your Company Catalog. The copied item opens in the **Edit** state, where you can adjust relationships, filters, fields, or visualizations to meet your requirements.

You can copy Marketplace items at all levels, including query objects, reports, and dashboards. This approach lets you reuse proven logic while safely tailoring analytics for your organization.

ORD Personas

OPUS Reports and Dashboards supports different personas, each with a clear purpose and level of access. Understanding these personas helps you know who creates analytics, who uses them, and how information flows across your organization and partner network.

1. **TraceLink Administrator:** As a TraceLink Administrator, you configure and manage Query Objects, Reports, and Dashboards. You define reusable ORD elements (Query Objects, Reports and Dashboards) that reflect business needs and make them available to others. Your work ensures that teams rely on consistent and trusted data when they make decisions.

2. **Business User:** As a Business User, you use ORD to support day-to-day decisions. You rely on clear, timely insight to understand what is happening across supply chain processes. You focus on analyzing results, identifying issues, and taking action rather than building analytics from scratch.

3. **Partners:** Partners access reports and dashboards that your organization shares with them. This shared visibility allows both sides to look at the same data at the same time, which helps resolve issues faster and improves collaboration across the network.

Together, these personas ensure that ORD delivers the right information to the right people, while maintaining control and consistency across your extended supply chain.

ORD Roles

ORD roles controls the permissions to control access to the ORD elements. Understanding these roles helps you maintain clarity, consistency, and governance while working with ORD.

Following roles are available for ORD:

1. **Report Builder Creator:** A Report Builder Creator role allows you to create, configure, and manage query objects, reports, and dashboards. You define the reusable Query Objects, build and edit Reports, and assemble Dashboards. You can search for, view, create, edit, and manage Query Objects that the company can use as the basis for its reports, and then release those query objects to the company catalog so other report designers can use them.

2. **Report User:** As a Report User, you focus on using ORD elements rather than building them. You view reports and dashboards that Report Builder Creators publish. You rely on these views to answer business questions and support daily

decision making. You can not create or edit query objects. The Report User role allows you to view reports and dashboards but not Query Objects.

Managing ORD Elements

As you work with ORD, you manage three types of elements: Query Objects, Reports, and Dashboards. All three follow the same lifecycle rules and use the same core actions. Understanding these rules helps you work safely and consistently as you build Reports and Dashboards.

Each ORD element moves through two workflow states. When you first create an element, it starts in the **Edit** state. You use this state to define relationships, criteria, filters, fields, and visualizations. When the element is ready for use, you move it to the **Released** state.

There are two key rules to remember:

1. You must release a Query Object before you can use it to create a Report.
2. You must release a Report before you can use it in a Dashboard.

These rules ensure that downstream ORD elements always rely on stable and approved underlying elements.

Once you release an element, you cannot edit it directly. This protects users who depend on released reports and dashboards. If you need to make changes, you create a copy or a new version and apply your updates there.

You manage ORD elements using common toolbar actions. Use **Copy** to duplicate an existing element, either from the Marketplace to your Company Catalog or within your Company Catalog. The copied element always opens in the **Edit** state. Use **New Version** when an element is already released and you need to improve or update it. Use **New** when you want to create an element from scratch for a unique use case.

Query Objects

Query Objects Concept

Query Objects form the foundation of ORD. You use Query Objects to define which data the system retrieves and how different business objects relate to each other.

When you build a Report, you always start with a Query Object. The Query Object determines which business objects appear in the report and which attributes are available for analysis. Reports and Dashboards depend on this structure, so careful design at this stage is important.

Each query object includes one **Primary Object**. This is the main business object you want to analyze, such as a Purchase Order, Delivery, or T2 Record. You can then add related business objects as **Secondary**, **Tertiary**, or **Quaternary** objects to bring in additional context.

You define relationships between these objects so ORD knows how to combine the data. A single, well-designed query object can support multiple reports. This reuse helps you stay consistent and reduces the need to rebuild logic for each report.

As a Report Builder Creator, you create and manage Query Objects. Report Users do not interact with query objects directly. They work only with the Reports and Dashboards built on top of them. This separation keeps the reporting experience simple for users while maintaining control over the underlying data structure.

Creating a Query Object

To Create a Query Object

1. Select **Reports and Dashboards** from the Main Menu.
2. In the side menu, select **Query Objects > Company**.
3. Click **New**.

4. In the General section, fill in the following fields:
   - **Query Object Name**: Enter a Query Object name.
   - **Application Name**: Select the relevant application from the Application Name drop-down.
   - **Description** (Optional)
   - **Primary Business Object**: Select the business object for which you want to see the data.
   - **Catalog Type**: Select Company from the Catalog Type drop-down.
5. Optionally, do the following in the Relationship section:
   - Click the **Add** + button to add a Secondary Business Object.
   - **Secondary Business Object**: Select the desired Secondary Business Object from the drop-down.
6. Click **Save**.

Reports

Reports Concept

Reports are the second layer in the ORD framework. You use reports to turn data from a single Query Object into a clear, interactive table that supports analysis and decision making.

When you create a Report, you always start by selecting one Query Object. The Query Object defines which business objects and fields are available. The Report controls how that data appears and how you work with it.

Each Report follows a simple flow. First, you select the Query Object. Next, you define Report Criteria such as Process Network, Partners, Date Ranges, and Columns. Finally, you interact with the report once the data loads.

Reports are no-code and interactive. You can filter, sort, group, pivot, and hide or reorder columns directly in the table. You can also add computed fields to create simple calculations that help you compare values and identify trends.

Reports support reuse and consistency. You can use the same Report in multiple Dashboards, which ensures that different users and teams rely on the same data and definitions.

Use a Marketplace Report

The Marketplace Catalog offers a library of predefined reports designed for immediate use. You can leverage these reports to address common use cases without the need for manual configuration.

To Use a Marketplace Report

1. Select **Reports and Dashboards** from the **Main Menu** ⁝⁝⁝.
2. In the side menu, select **Reports** > **Marketplace**.
3. Click **Filter** to narrow the list of available Marketplace reports.

4. In the Filters push panel, select an Application such as **US Compliance** from the Application Name drop-down list.
5. Click **Apply**.
6. In the search results, select the row for the report you want to use.
7. From the Operations toolbar, click **Copy**.
8. In the Copy push panel, select **Company** as the Catalog Type.
9. Enter a new **Report Name** that clearly identifies the purpose of the report.
10. Click **Apply**.

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

Note: To locate the new report in the Search table, remove the **State: RELEASED** filter criteria located at the top of the Search table.

You can now configure the report to meet your requirements. For example, you can update report criteria, change selected columns, apply filters, or add computed fields. When you finish your changes, move the report to the **Released** state so it can be used in dashboards.

Note: When you create a copy of an existing Marketplace Report, the system automatically includes the underlying query object. This means the new report will inherit all pre-configured data filters, logic, and source parameters from the original version. If you prefer to build a report from scratch without inherited configurations, refer to the ORD *Help Center*.

Dashboards

Dashboards Concept

Dashboards are the top layer of the ORD framework. You use dashboards to bring data together on a single page and view it through tables and charts. Dashboards help you move quickly from detailed data to a clear, high-level understanding of what is happening.

Dashboards are built on reports. Each dashboard element uses one or more reports as its data source. You can reuse the same report across multiple dashboard elements or even across multiple dashboards. This reuse helps you keep metrics consistent while presenting them in different visual formats.

Dashboards maintain client-side interactivity. Once the data loads, you can interact with it by applying filters, changing chart types, and adjusting how information is displayed. When you apply a filter, all linked elements update together so you always see a consistent view of the data.

Dashboards support cross-network and cross-application visibility. You can combine insights from different process networks and applications to see end-to-end performance in one place. This makes dashboards well suited for monitoring trends, identifying risks, and focusing attention on key areas.

Create and Configure a Dashboard

Task 1: Create a New Dashboard

1. In the side menu, select **Dashboards** > **Company**.
2. Click **New**.
3. Enter a **Dashboard Name**.
4. Optionally, enter a description to explain the purpose of the dashboard.
5. Select **Company** from the Catalog Type drop-down.
6. Click **Save**.

The dashboard opens in the Author mode and is ready for configuration.

Task 2: Configure the Dashboard

1. Select the **Section 1** object collector (the Section 1 dotted box).
2. Click the **Drag and Drop Field** icon from the design toolbar.
3. From the list of available reports, drag a report into the dashboard section.
4. Wait for the report to load into the section.
5. In the top-right corner of the section, click the **Chart** icon.
6. Click the **Menu** icon and then select **Edit Chart**.
7. Choose the desired chart type, such as a Table or Pie Chart.
8. Click **Save**.

The dashboard displays the selected report using the chosen visualization.

Task 3: Release the Dashboard

1. In the dashboard toolbar, locate the workflow state options.
2. Click **Move To** under **Released**.
3. Click **Save**.

The dashboard moves to the **Released** state and is available for use and sharing.