

# Opus Solution Designer



# Agenda

- Opus No-Code Fundamentals
- Opus Solution Environment
- Opus Workflows
- Opus Integrations
- Opus Reports & Dashboards





# Opus No-Code Fundamentals

*Keynotes of Metadata-Driven Solutions with Jerry Meyer*



# Opus Solution Designers create and configure Standard, Marketplace, and Company no-code solutions to solve unique multienterprise business challenges



Opus Developer

My goal is to...

Develop **Multienterprise Applications** and **Standard Solutions** for our customers that can be:

- Used out-of-the-box to exchange data with **Network Trade Partners**
- Integrated with enterprise systems and trade partners using **Transforms** and **Link Actions**



Opus Solution Designer  
(Solution Partner)

My goal is to...

Develop **Marketplace Solutions** for industry market segments that I can publish in TraceLink's global **Marketplace Solution Catalog** making it available to Opus customers



Sally  
Solutions

Solution Developer  
(Customer)

My goal is to...

Configure my **Company Solutions** to my company's unique requirements while still being able to benefit from the TraceLink **Integrate Once, Interoperate Everyone** core tenet.



Sierra  
Buywell

User

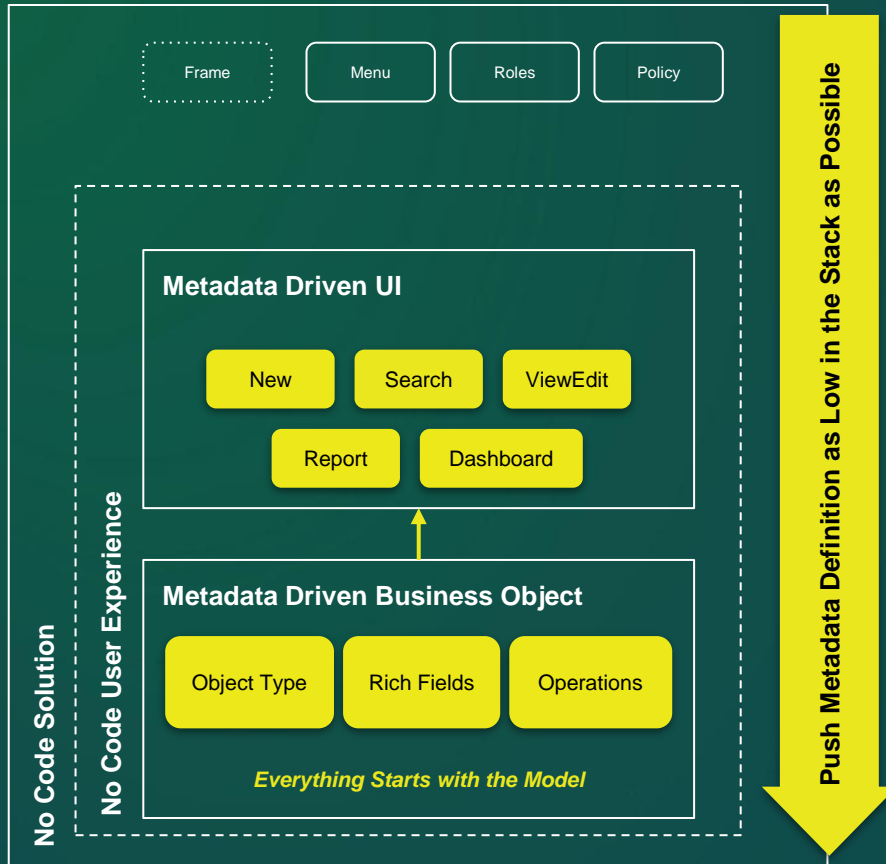
My goal is to...

Use TraceLink's **Standard Solutions** so my company stays up to date with the latest versions and can leverage new features immediately

Use a **Company Solution** specifically tailored to our business requirements

And because Opus has an **Opinionated User Interface** it is easy to use and consistent across ALL Solutions so I and my trade partners require minimal training

# Metadata forms the foundation for the rich, no-code Opus Solution Environment



**Business Object Metadata** (i.e. Data Model) defines the foundational characteristics and behaviors for an application

**User Interface Metadata** configures standard page types to produce a no-code user experience

**Solution Metadata** tie together and fine tune the specific experiences for users with defined authorizations using menus, roles, and permissions

*In addition to common no-code features described above (e.g. metadata driven drag-n-drop UI), TraceLink has optimized Opus for multienterprise apps and the B2B Domain*

# MINT's Business Transaction Objects (BTOs) enable frictionless orchestration of complex supply chain processes out-of-the-box

## Primary Objects

Think  
**Nouns**

Business Objects represent the domain of an application such that users intuitively know what to do when working with them

## Fields

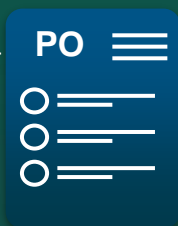
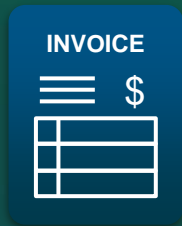
Think  
**Characteristics**

Fields capture the characteristics of a Business Object to help distinguish one object from another

## Operations

Think  
**Verbs**

Operations are the actions a user can perform on a Business Object



- ❖ \* Supplier Name
- ❖ \* Customer Name
- ❖ Product Code
- ❖ Problem Description
- ❖ \* Reference Transactions

- ❖ New PO
- ❖ Edit PO
- ❖ Change State from *Drafted* to *Submitted*

# Object metadata driven pages and navigation reduce design and development effort and govern a consistent UX across solutions, focused on business objects and information

## Search Page

Kendall Pharmaceuticals

Home | MINT - Global Supplier Net...

Global Supplier Network | All Teams

### Search Purchase Orders

View all purchase orders.

[New](#) [Filter](#)

PO Number	Transaction Status	Supplier	Order Date	Delivery Date	Last Modified
<a href="#">260320210011</a>	Sent	Alpenstock	16 May 2023	24 May 2023	02 May 2023 12:38 PM
<a href="#">260320213546</a>	Draft	Globex Corporation	17 May 2023	24 May 2023	11 May 2023 10:38 PM
<a href="#">260320219637</a>	Sent	Acme	02 Jun 2023	24 May 2023	12 May 2023 10:18 PM
<a href="#">260320210371</a>	Sent	Initech	10 Jun 2023	14 May 2023	16 May 2023 11:08 PM
<a href="#">260320219823</a>	Sent	Alpenstock	12 Jun 2023	30 Aug 2023	17 May 2023 12:28 PM
<a href="#">260320210758</a>	Sent	Initech	22 Jun 2023	27 Aug 2023	19 May 2023 12:18 PM
<a href="#">260320218011</a>	Sent	Globex Corporation	18 Jul 2023	26 Aug 2023	22 May 2023 11:20 PM
<a href="#">260320246889</a>	Sent	Alpenstock	24 Jul 2023	26 Aug 2023	19 May 2023 10:18 PM

Rows per page: 100 | Showing 1-100 items

Business Objects appear in Side Menu

## New Page

Kendall Pharmaceuticals

Home | MINT - Global Supplier Net...

Global Supplier Network | All Teams

### New Purchase Order

Add a new purchase order.

[New](#) [Save](#)

**Order Information**

PO Number\*

## View/Edit Page

Kendall Pharmaceuticals

Home | MINT - Global Supplier Net...

Global Supplier Network | All Teams

### Purchase Order Details

View and edit purchase orders.

[PO Ack](#) [ADM](#) [Invoice](#)

**Transaction Information**

Sender: Kendall Pharma  
Receiver: ACME Corporation  
Status: Submitted  
Last Processed Date: 12 Jul 2024 12:30 PM  
Result: Delivered

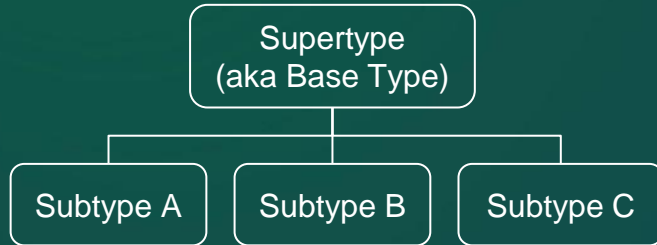
**Order Information**

PO Number: 260320210011  
Order Date: 12 Mar 2024

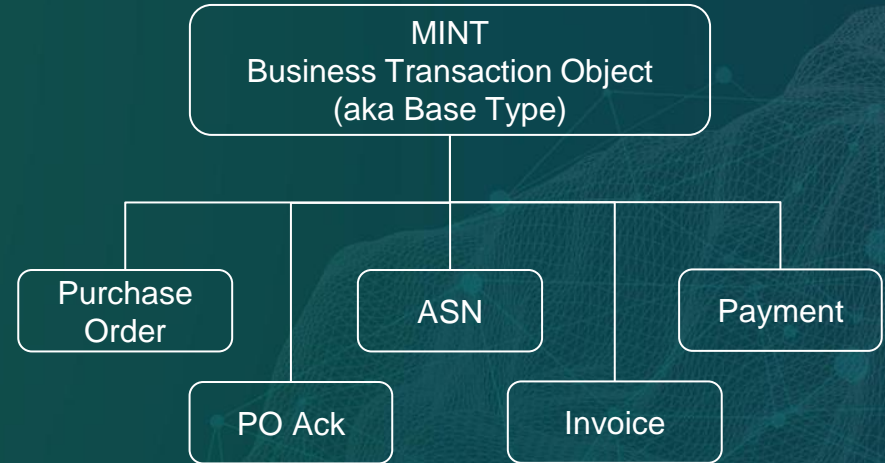
# Subtyping with Company Objects is a key accelerator for multienterprise solutions without compromising interoperability

## In Theory...

*Subtyping is a notion in programming language theory where a subtype, which is a data type, is related to a supertype based on the notion of substitutability, where program elements such as functions and subroutines that are written for the supertype will still operate if given the subtype instead.*



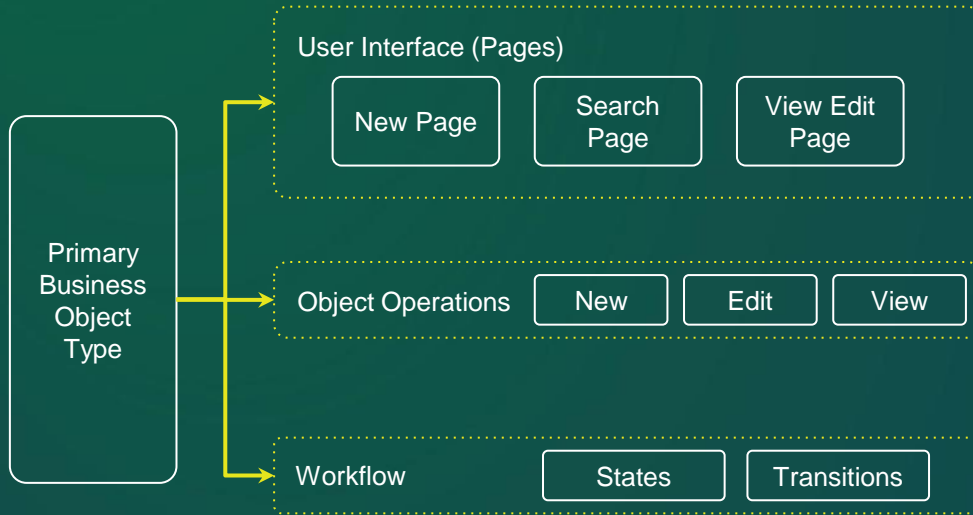
## In Practice...



*MINT Subtyping optimized for B2B Domain*



# Metadata-driven components and workflows reduce design and development effort with pre-defined object operations and and workflows



**Fields, Groups, and Collections** on a page automatically behave based on their metadata properties, greatly reducing development and design effort for pages within a solution

**Standard Object Operations** are pre-aligned with Page Types, eliminating the need to manually configure actions or buttons (automatically available)

**Business Objects** come with extendable base workflows, allowing customers to configure substates and transitions without adding complex application logic

# Page types provide a clear structure with object details, sections, fields, and consistent button placement, simplifying navigation and user actions across all page types

**Object Operations**

**Page Level Actions**

**Fields**

**Toolbar**

**Workflow States**

**Fields**

**Purchase Order Details**

View and edit purchase orders.

**Transaction Information**

Sender	Receiver
Kendall Pharma	ACME Corporation
Process Status	Last Processed Date
Submitted	12 Jul 2024 12:30 PM
Last Transaction Error	Result
-	Delivered

**Order Information**

PO Number*	Order Date
260320210011	06 Sep 2024
Delivery Term Code	Delivery Term Description
INCO 1	COD
Payment Terms By Days	Payment Terms By Percentage
14	5
Currency	
USD	

**Customer and Supplier**

**Ship To Location and Bill To Location**

**Search Purchase Orders**

View all purchase orders.

PO Number	State	Buyer	Order Date	Delivery Date	Last Modified
<a href="#">260320210011</a>	Sent	Kendal Pharma	16 May 2023	24 May 2023	02 May 2023 12:38 PM
<a href="#">260320213546</a>	Sent	Kendal Pharma	17 May 2023	24 May 2023	11 May 2023 10:38 PM
<a href="#">260320219637</a>	Sent				

**New Purchase Order**

Add new purchase order.

**Workflow States:** Draft (Active), Submit, Processing, Processed, Preparing To Send, Sending, Sent

**Order Information:**

PO Number*	Order Date
260320210011	06 Sep 2024
Delivery Term Code	Delivery Term Description
INCO 1	COD
Payment Terms By Days	Payment Terms By Percentage
14	5
Currency	
USD	

**Customer and Supplier**

**Ship To Location and Bill To Location**

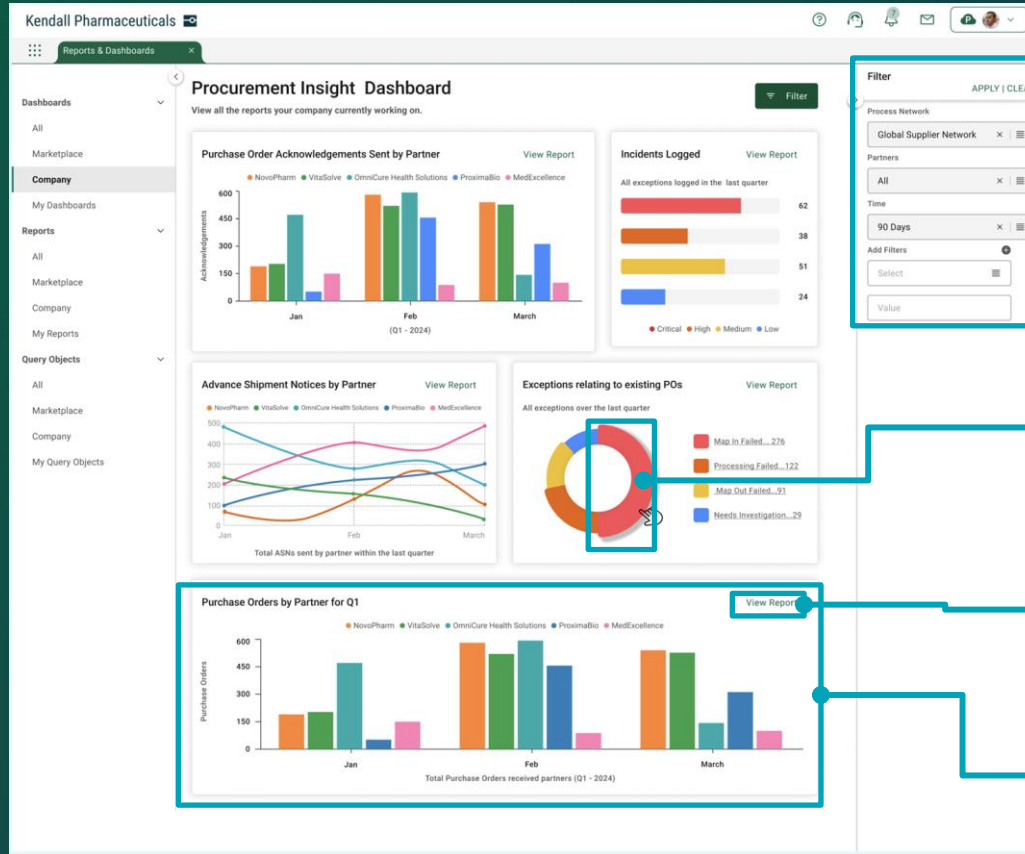
# This opinionated UI also lays the foundation for Reports and Dashboards, enhancing the future supply chain intelligence

## Fun Fact

Dashboards, Reports, and Query Objects ARE the Business Objects of the Report Builder Application

## Coming Soon

Solutions will include Reports and Dashboard



Dashboard Filters

Drill down report opens in new tab based on user's selection (e.g. only a report with Map In Failed exceptions)

Dashboard Report opens in new opus tab, with tabular report

Dashboard Element pulls from report (e.g. Purchase Order Tracking)

# Key Takeaways

- **Unified No-Code Environment:** Standard, Marketplace, and Company Solutions all utilize the same no-code Solution Design Environment with drag-and-drop editing and an opinionated UI, simplifying the creation and configuration of solutions.
- **Metadata-Driven Development Framework:** No-code development and design starts with metadata definitions at the Business Object (Noun), Field (Characteristic), and Operation (Verb) level, which build up to user interfaces like pages (new, search, edit) and finally entire solutions with menus and navigation.
- **Business Objects and Navigation:** Business Objects, represented in the left navigation menu, link users to Search, Report, or Dashboard pages, with consistent options to either create new records or view/edit existing ones via a structured and intuitive UI flow.
- **Configuration with Subtyping and Workflow Extensions:** Subtyping allows tailored object types (e.g., MINT subtypes for PO and Invoice from a BTO), and workflows can be extended with substates, allowing customers adapt solutions to specific business needs.
- **Page Structure and Consistency:** Pages follow a clear structure with menus, page titles, sections, fields, and operations/buttons arranged consistently reducing design and decision overhead, making user actions intuitive and easy to learn across any solution.





# Opus Ensemble & Opus Solution Environment

*Amplifying Opus Solutions with Siva Umapathy*



# Metadata drives the no-code configuration capabilities, including the configuration of business objects, fields, operations, pages, and menus

Standard & Marketplace Solutions in Opus come enriched with metadata and functionality. Opus Solution Designers can configure various components of a Company Solution, transforming it into a Company Solution that both Owning and Partner users can view and interact with.

Here is an overview of the options available for Opus Solution Designers to configure:

1. **Pages in the Content Area:** Search, New, and View/Edit pages are driven by the primary business object and its metadata. Solution Designers can organize this data using a drag-and-drop interface in OSE.
2. **Toolbar:** This contains various page and object operations that trigger actions on the page.
3. **Push Panel:** Depending on the page type (Search, New, View/Edit), panels can be configured to view and manipulate information, such as filter criteria on a filter panel.
4. **Side Menu:** Pages can be associated with menu items and organized within the side navigation.
5. And so much more...

The screenshot displays the 'Search Purchase Orders' page in the Opus application. The interface is annotated with numbered callouts:

- 1:** Points to the side menu on the left, which lists various business objects like 'Purchase Orders', 'Purchase Order Acknowledgments', etc.
- 2:** Points to the toolbar at the top of the main content area, containing buttons for '+ New', 'Export', and 'Filter'.
- 3:** Points to the 'Filters' panel on the right, which allows users to filter search results by criteria like 'Keyword', 'Status', 'Buyer', and 'Last Modified'.
- 4:** Points to the main content area, which displays a table of purchase orders.

PO Number	Transaction Status	Last Modified	Supplier	Order Date	Delivery Date
<a href="#">260320210011</a>	Delivered	08 Oct 2023, 12:34 PM	Alpenstock	16 May 2023	24 May 2024
<a href="#">260320210012</a>	Inbound	08 Oct 2023, 12:34 PM	Globex Corporation	16 May 2023	24 May 2024
<a href="#">260320210017</a>	Delivered	08 Oct 2023, 12:34 PM	Alpenstock	16 May 2023	24 May 2024
<a href="#">260320210024</a>	Inbound	08 Oct 2023, 12:34 PM	Alpenstock	16 May 2023	24 May 2024
<a href="#">260320210057</a>	Delivered	08 Oct 2023, 12:34 PM	Globex Corporation	16 May 2023	24 May 2024
<a href="#">260320210089</a>	Delivered	08 Oct 2023, 12:34 PM	Alpenstock	16 May 2023	24 May 2024
<a href="#">260320210014</a>	Delivered	08 Oct 2023, 12:34 PM	Globex Corporation	16 May 2023	24 May 2024
<a href="#">260320210090</a>	Delivered	08 Oct 2023, 12:34 PM	Globex Corporation	16 May 2023	24 May 2024

At the bottom of the table, it shows 'Rows per page' set to 100 and 'Showing 1-100 items'.

**Note:** Workflows are also configurable—we'll explore this in the Workflow section later on in the presentation.

# Standard and Marketplace solutions deliver immediate value out-of-the-box, while Company solutions offer extensive configurability to meet specific needs

## Standard Solutions

- Available in: Standard Catalog
- Created by: TraceLink's Opus Developers
- Configurable by customers: No ; Can be saved to the Company Catalog before configuring
- Details:
  - Preinstalled, providing baseline functionality for common business needs
  - Includes predefined pages, menus, roles, workflows, business objects, and policies

## Marketplace Solutions

- Available in: Marketplace Catalog
- Created by: Solution Partners, TraceLink Professional Services, and TraceLink Product Development teams
- Configurable by customers: Must be saved to the Company Catalog before configuring
- Details: Offers broad range of functionalities designed for various orchestrations

## Company Solutions

- Available in: Company Catalog (after saving from Standard or Marketplace)
- Configured by: Customers, Solution Partners
- Configurable by customers: Yes
- Details:
  - Tailored to the specific needs and orchestrations of a company
  - Allows configuration of pages, menus, roles, workflows, business objects, policies, and notification templates
  - Flexible and adaptive to align with the company's operational and strategic goals

#futurelink24

*Fun Fact: Every Solution is built using OSE solution*

tracelink

The screenshot shows the TraceLink interface. On the left is a navigation menu with categories: Catalog, Available, Solutions, and Solution. The 'Solutions' category is expanded, showing a list of solutions: Standard Solutions, Marketplace Solutions, and Company Solutions. Under 'Solutions', there are sub-categories: Business Object Types, Workflow, New Pages, Search Pages, View Edit Pages, Menus, Roles, and Policies. On the right, a modal window titled 'Solutions' is open, displaying a table of applied solutions. The table has two columns: 'Applied' (with a green checkmark icon) and 'Application Name'. The solutions listed are: Agile Process Team, Agile Process Team, Agile Process Team, Master Data Sharing, Product Track - US, Product Verification, Russia Compliance, Supply Chain Work Management, Serialized Operations Manager, and US DSCSA Compliance.

Applied	Application Name
✓	Agile Process Team
	Agile Process Team
	Agile Process Team
	Master Data Sharing
	Product Track - US
✓	Product Verification
	Russia Compliance
✓	Supply Chain Work Management
✓	Serialized Operations Manager
✓	US DSCSA Compliance



# Movie Time!

## Configuring a Purchase Order Page

**Setting:** Kendall Pharmaceuticals is an MAH who needs to request certain medical supplies from their one of their suppliers, Munro Supplies. Kendall Pharmaceuticals is TraceLink customer who licenses (i.e. Owns) MINT and who is linked with various trade partners on the TraceLink Network, including Munro Supplies. Kendall Pharma and Munro Supplies will leverage TraceLink MINT solution via Kendall Pharma's Global Supplier Network process Network.

**Starring:** Sally Solutions is configuring Kendall Pharmaceuticals MINT Solution that will help facilitate their procure-to-pay processes within the Commerce Orchestration.

**Action:** Sally wanted to make some quick changes on the ViewEdit PO page. Much like Sally would, let's start configuring a company solution; And make changes to the ViewEdit PO page by locating and dragging metadata onto that page.



Kendall has licensed MINT and by default is using Standard Solution

Debbie, member of MINT process network can see the standard menu

**tracelink**  
NETWORK FOR GREATER GOOD

### Login

Email  
qeauto+kendallpharmaceuticals-mem2@tracelink

Password  
.....

[Forgot Password?](#)

**LOG IN**

[BACK](#)

[Request access](#) to the world's largest pharmaceutical supply chain network.

#### WELCOME TO THE TRACELINK NETWORK

- 339,000+** Active Network Links
- 291,000+** Authenticated and onboarded network members
- 1,600+** Customers across the supply chain
- 128+** Countries with Integrated Network Members
- 35+** TraceLink Network-Enabling Solutions
- 4.6+** billion in customer savings by avoiding point-to-point integrations

# Menu items and pages are securely governed by roles, permissions, and policies ensuring users have access only to relevant information and operations

## User's View: Side Menu for in-Solution Navigation

- Submenus - Configured to categorize like-objects by orchestration/use case.
- Menu items represent primary business objects like Purchase Orders, Invoices (MINT), Shipments, Receipts (SOM).
- Context: Driven by Network selection (owning, partner) and Partner selection in the network composer (for multienterprise solutions). Driven by main menu selection for enterprise solutions.

## Opus Solution Designer's Controls with OSE:

- Create and configure roles and permissions
- Associate Pages to Menu items
- Apply roles to Menu items
- Create Submenus to group primary business objects by orchestration/use case
- Change display names on menu items and submenus

The image displays two screenshots from the Opus Solution Designer interface. The left screenshot, titled 'MINT Menu Details', shows the configuration of a menu structure. It features a sidebar with a 'Menu' section and a main table for 'Submenus and Menu Items'. The table has columns for 'Submenu Name', 'Display Name', 'Menu Item Name', and 'Display Name'. The 'Submenu Name' column shows a hierarchy: 'all\_Transactions' (sub menu) containing 'manufacturer\_Customer' (sub menu), which in turn contains several menu items like 'purchase\_Orders', 'purchase\_Order\_Acknowledgments', 'shipment\_Notification', 'Invoices', 'production\_Plan', 'Inventory\_Balance', 'Inventory\_Adjustment', and 'material\_Issued'. The right screenshot shows a user's view of the 'Global Supplier Network' solution. The side menu on the left mirrors the configuration, with 'Purchase Orders' and 'Material Issued' highlighted as 'menu items'. The main content area displays a 'Search Purchase Orders' table with columns for 'PO Number' and 'Transaction Status', listing various purchase orders.

Submenu Name	Display Name	Menu Item Name	Display Name
> all_Transactions	All Transactions		
>> manufacturer_Customer	Manufacturer - Customer		
>>> purchase_Orders	Purchase Orders		
>>> purchase_Order_Acknowledgments	Purchase Order Acknowledgments		
>>> shipment_Notification	Shipment Notification		
>>> Invoices	Invoices		
>>> production_Plan	Production Plan		
>>> Inventory_Balance	Inventory Balance		
>>> Inventory_Adjustment	Inventory Adjustment		
>>> material_Issued	Material Issued		

PO Number	Transaction Status
260320210011	Delivered
260320210012	Inbound
260320210017	Delivered
260320210024	Inbound
260320210057	Delivered
260320210089	Delivered
260320210014	Delivered
260320210090	Delivered
260320210090	Delivered
260320210090	Delivered
260320210090	Delivered



# Movie Time!

## Configuring Partner & Owner views ; Changing Partner experience

**Setting:** The process network is configured to use PO, Remittance Advices & Forecast plans. Their partner users at Munro Supplies should only be able to search and view the POs & Forecast plans.

### **Action:**

Let's configure roles and permissions to ensure that users on either side of that link are able to see and do what is expected based on their role.

Let us also configure a different PO search page for Munro user's to tailor to their needs

Kendall's Network  
has 2 partners

Munro &  
SalDevices

Both start with  
same user  
experience

The screenshot shows a web browser window with the URL <https://test04-opus.tracelink.com/g2/platetest04/fc408ba0-bfe3-458e-870e-c63f1703f97e/p/myPartnerNetworks/047ae92b-7128-42c7-92c3-e37bb5f3ca71fc408ba0-bf>. The application is titled 'MunroDevices' and is in the 'MINT External Mfg' context. The user is logged in as 'KendallPharmaceuticals - External Mfg'.

The main navigation menu includes:

- Manufacturing - Customer
- Manufacturing - Customer
- Purchase Orders** (highlighted with a green mouse cursor)
- Remittance Advices
- Forecast Plans
- Forecast Plan Responses

The 'Search Purchase Orders' section has a '+ New' button and a 'Filter' button. Below the header, it says 'View all purchase orders.' and displays a table with the following columns: PO Number, State, Supplier, Order Date, Delivery Date, and Last Modified. The table is currently empty, showing 'No data available.' and 'Showing 0 - 0 items'.

# Key Takeaways

- **Metadata-Driven Configurations:** Metadata powers no-code configuration for objects, operations, pages, and fields, streamlining company solution configuration.
- **Immediate Value & Flexibility:** Standard and Marketplace solutions provide out-of-the-box value, while company solutions offer deep configurability to meet specific needs.
- **Roles and Permissions:** Menu items and pages (including object operations) are securely controlled by roles and permissions, ensuring users access only relevant features, making it easier to govern multienterprise use cases.
- **Streamlined Page Design and Navigation:** Pages are all metadata driven, minimizing design decisions and effort and keeping focus on effective data/content organization,





# Opus Workflows

*Composing business object movement  
with LJ Hall*



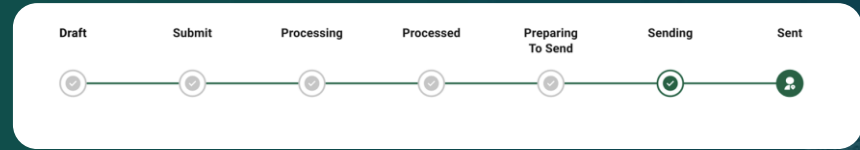
# Workflows enable businesses to streamline and automate processes, ensure consistency across like-objects, and adapt processes to specific needs, enhancing overall orchestration performance

Workflows are powerful mechanisms that enhance business process management by providing structure, automation, and integration.

By leveraging workflows, businesses can achieve greater efficiency, consistency, and flexibility in their operations and within their orchestrations.

Whether using an out-of-the box workflow or workflows configured to specific business needs, the ability to define, manage, and automate processes is crucial for modern business success.

User can view their object instance's current state on the New/View page and move through that state on the Edit page



### Purchase Orders Details

View and edit workflow states and transitions for your company's solutions.

**General**

Solution: Multienterprise Information Network Tower 1.0.0 | Business Object Type: Purchase Orders

**Workflow States and Transitions**

Base State	Sub State	Display Name
> DRAFT		Draft
> SUBMITTED		Submitted
> SUBMITTED	PENDING APPROVAL	Pending Approval
Transition To State	Transition Condition	Transition Action
APPROVED	Y	N
REJECTED	N	Y
> SUBMITTED	APPROVED	Approved
> SUBMITTED	REJECTED	Rejected
> PREPARE_INBOUND		Prepare Inbound
> PROCESS_INBOUND		Process Inbound
> PREPARE_OUTBOUND		Prepare Outbound

**View Details**

**General**

From State: PENDING APPROVAL  
To State: APPROVED

**Transition Condition**

```
function triggerTransition(ctxContent, context, TransitionObject) {
  var isTransitionSuccessful = "true";
  if(TransitionLogic.Y)
    return isTransitionSuccessful;
}
```

**Transition Action**

```
function triggerTransition(ctxContent, context, TransitionObject) {
  var isTransitionSuccessful = "true";
  if(TransitionLogic.Y)
    return isTransitionSuccessful;
}
```

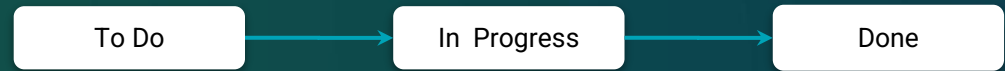
# Standard Workflows provide out-of-the-box functionality while configurable Company Workflows adapt to specific business needs

## Standard Workflows

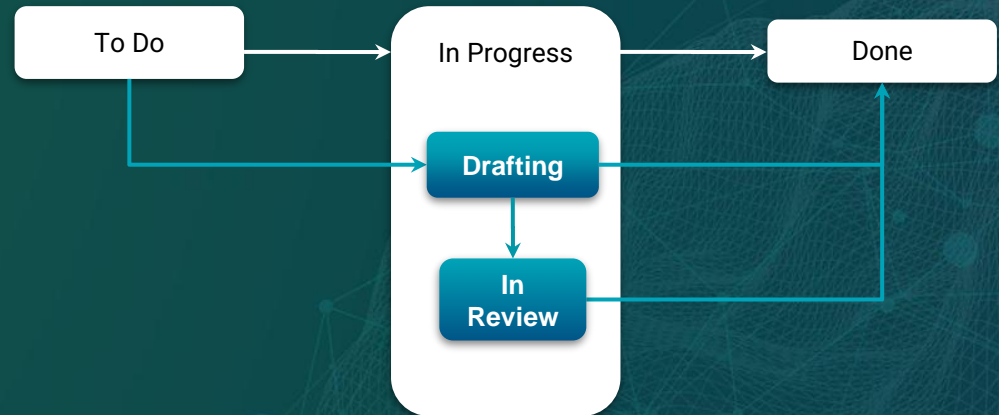
- Come out-of-the-box with their solution
- Predefined sequences of **states** and **transitions** commonly used for business processes. Opus Developers define the standard object type and its associated standard workflow.
- Solution Designers cannot configure standard workflows, however understanding the standard workflow helps to think about how to extend the standard workflow with configurations in their company solutions.
- In short, just like solutions, if a Solution Designer takes a standard workflow and uses it in a company solution as is, or adds configurations, it officially becomes a company workflow.

## Company Workflows

- Offer flexibility to Solution Designers and an effective way to handle specialized and complex business processes that standard workflows cannot fully address
- Configurable with **substates**, along with **transitions**, **transition conditions** and **post-transition actions** to address unique business requirements.



Example: Standard Workflow



Example: Company Workflow

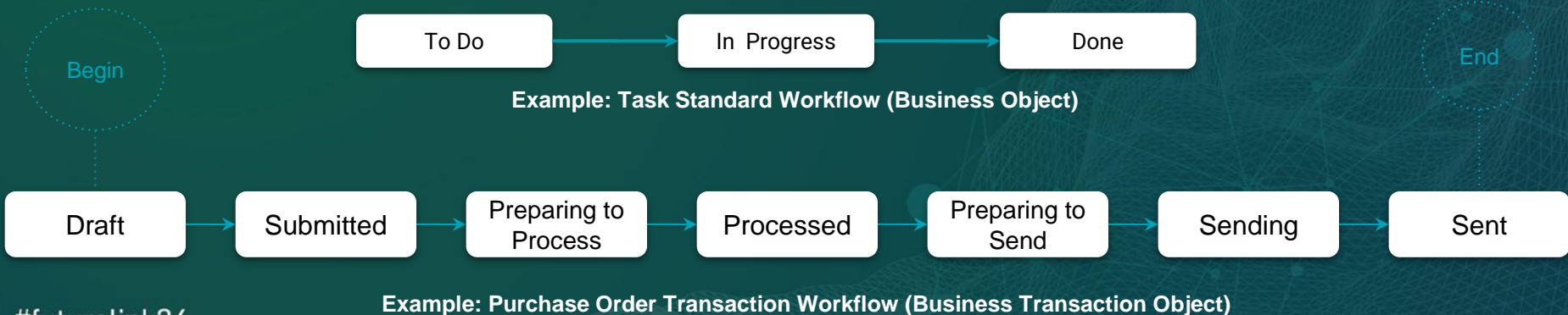


# Solution Designers can configure Business Object Workflows and Business Transaction Workflows

**Business Object:** With business objects like a SCWM Task, you can see the simplicity in the standard workflow. This is intentional to keep things consistent and easy to extend.

**Business Transaction Objects:** Using MINT's Purchase Order object type, you can see a more complex example of how base states are used. *All B2B transactions come with this workflow out-of-the-box.*

These are intentionally more robust with an extra focus on handling business transactions. Transactions historically have had shortcomings of traditional message flows that do not retain data for querying or viewing. Transaction object types, with the help of their workflow, offer that visibility that was previously lacking.



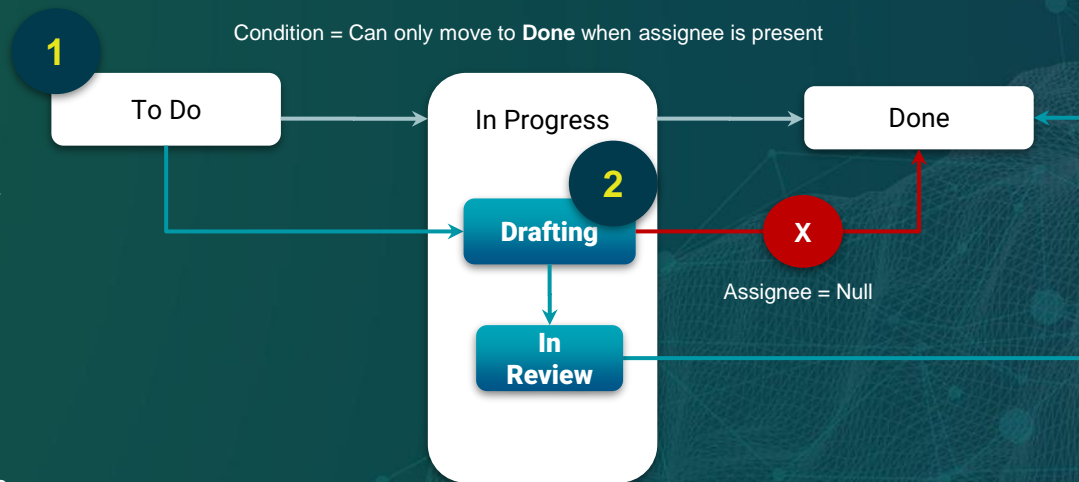
# Configurable Workflows enable fine-grained control with substates, transition conditions, and post-transition actions which offer more sophistication without additional application logic

**States:** All workflows have base states (out-of-the box) and can be extended with substates:

1. Base States- Primary states in a workflow that denote the phases in the lifecycle of an object type.
2. Substates -More granular states that exist within a base state. They provide additional detail and specificity about the workflow. These states allow for finer control and tracking of workflow progress

**Transitions:** Move an object from its current workflow state to another state (whether a base state or a combination of base and substates). Configurations ensures that objects move through their workflow in a controlled and predictable manner.

- Transition Conditions - Criteria that must be met for a transition to be considered valid, and therefore for the workflow to progress to the next defined state.
- Post-Transition Actions - JavaScript that executes after a state transition, enabling additional logic to define specific behaviors, such as handling errors, sending or triggering post-processing activities.



Example: Company Workflow for SCWM Tasks



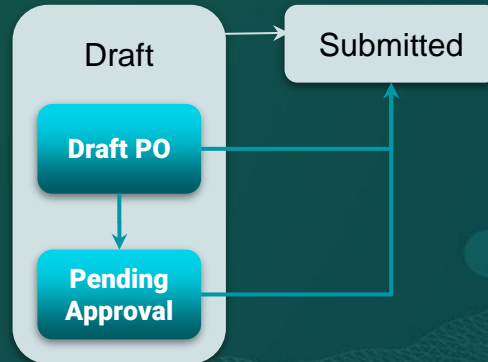
# Movie Time! (REVIEW)

## Configuring a Workflow

**Setting:** Kendall Pharmaceuticals is an MAH who needs to request certain medical supplies from their one of their suppliers, Munro Supplies. Sierra Buywell identifies a recurring issue with budget overages during quarterly procurement cycles. To address this, she collaborates with Sally Solutions to introduce an approval process for POs using OSE.

**Starring:** Sally Solutions is configuring Kendall Pharmaceuticals MINT Solution to enhance their procure-to-pay processes within the Commerce Orchestration. Sierra Buywell will approve all purchase orders before they are sent to suppliers.

**Action:** Let's configure our Purchase Order workflow to require a review process and observe how it impacts the user journey.



# Key Takeaways

- **Streamlined Process Management:** Workflows facilitate the structured movement of business objects through states and transitions, ensuring efficient process management.
- **Efficiency and Flexibility:** Workflows enhance business performance by automating processes, ensuring consistency, and allowing configuration to meet specific needs.
- **Out-of-the-Box and Configurable:** Standard workflows provide immediate functionality, while company workflows offer fine-grained control with substates, transition conditions, and post-transition actions.
- **Adaptable Workflow Design:** Solution Designers can configure workflows for both simple and complex business processes, ensuring alignment with unique operational needs.
- **Integration and Specificity:** Workflows integrate with other processes and include specific conditions and transitions, providing precise control and seamless data flow across business functions.





# Opus Integrations

*Arranging integrations with Link Actions and Transforms with Jeff Olson*



# Flexible MINT integration options to support supply chain orchestrations



## Link Actions

Customers who want a direct method for syncing transaction data from their ERP / QMS / WMS to MINT can do so through Link Actions.



## B2B Messages

File-based B2B messaging using standards such as X12 and EDIFACT, via SFTP and AS2 Connections



## MINT Product UI

Customers who want to work directly in the MINT user interface without integrating any internal systems.

Regardless of the manner used to integrate, the transaction is converted to canonical form using transforms

- Customers can integrate with many trading partners, with each trading partner using the protocol and format of their choosing
- Transform catalog provides out-of-the-box transforms for standard formats, and support partner-specific transforms

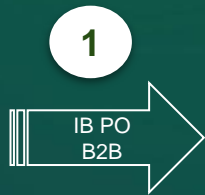
Transactions are modeled as business objects within the application, allowing the application to utilize standard OSE capabilities to define user experiences and processing logic all while seamlessly integrating with any and all business processes and data formats.

# B2B architecture and canonical approach enable transactions across all systems and data formats.

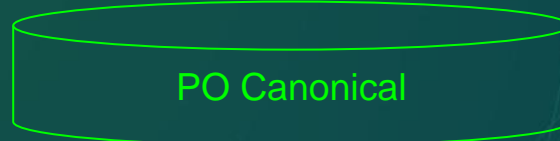
ERP System  
(Owner)

TraceLink

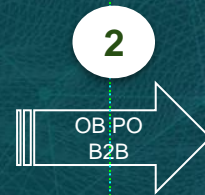
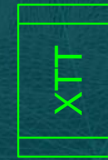
ERP System  
(e.g. Partner or Internal System)



Transform



Transform



Search B2B Messages

Priority	Priority Date	Message Type	Transaction ID	Sender	Receiver	Input File	Output File
High	21 Oct 2023 12:17	Standard Ordergram	898527	PartnerOrg102088	PartnerOrg102088	Standard Ordergram	Standard Ordergram
High	21 Oct 2023 04:15	Standard Ordergram	74036	PartnerOrg102088	PartnerOrg102088	Standard Ordergram	Standard Ordergram
High	24 Oct 2023 12:17	Purchase Order Acknowledgement	11112	PartnerOrg102088	PartnerOrg102088	ML_POA_20231024	ML_POA_20231024
High	24 Oct 2023 04:17	Purchase Order Acknowledgement	8932	PartnerOrg102088	PartnerOrg102088	ML_POA_20231024	ML_POA_20231024
High	24 Oct 2023 12:17	Purchase Order Acknowledgement	7492625	PartnerOrg102088	PartnerOrg102088	ML_POA_20231024	ML_POA_20231024
High	24 Oct 2023 12:17	Purchase Order Acknowledgement	74936	PartnerOrg102088	PartnerOrg102088	ML_POA_20231024	ML_POA_20231024
High	24 Oct 2023 12:17	Purchase Order	74936	PartnerOrg102088	PartnerOrg102088	ML_PO_20231024	ML_PO_20231024

UI













## Movie Time!

### B2B Connection Creation with Link Actions

**Scene:** I have a Netsuite system that I would like to integrate into my MINT solution in order to pass data back and forth. Once configured, I would like to verify that the data is flowing between MINT and Netsuite.

**Action:**

- Create a new NetSuite B2B Connection leveraging Link Actions from the Catalog for inbound and outbound B2B data exchange
- Search and/or View Link Action B2B Messages

# Transforms drive asynchronous integration, enabling efficient data exchange across systems and partners regardless of transaction format

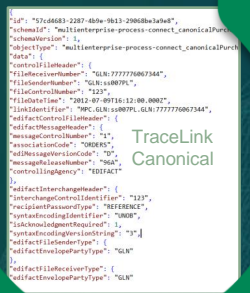
Opus Transformations provide infinite flexibility and adaptability across all of your data ingestion needs, providing unparalleled integration options.

When managing your data within Opus, data is transformed into a canonical data model that provides the single interoperable representation of your business processes. Transforms bridge your external business to the canonical data model representation.

The Opus Marketplace Catalog provides instant access to a host of common data transformation options, allowing you to leverage common transformations provided by the TraceLink Network and your partners. You can also contribute and share Transformations across the network.

For the specific needs of your organization, the Opus Company Catalog for Transforms provides a simple interface to develop, manage, and deploy your transformations across environments. Opus Transforms provide a number of technologies to provide the maximum flexibility for your needs.

```
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<EDI_DC40 SEGMENT="1">
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<NAMDT>300</NAMDT>
<DOCNR>0000000134206118</DOCNR>
<DOCKL>300</DOCKL>
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<SNOPFC>LS</SNOPFC>
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<RCVPR1>LS</RCVPR1>
<RCVPRMUNROLS300</RCVPRMUNROLS300>
<RCVLAD>COMPANYID:0030135941894</RCVLAD>
<CREDAT>20120709</CREDAT>
<CRET10>161218</CRET10>
<REFINT>Ref2IntchFile</REFINT>
<REFGRP>Ref2IntchGrp</REFGRP>
<REFRES>Ref2Msg</REFRES>
<ARCKEY>ED46AchiveKey</ARCKEY>
```



X12

TraceLink  
Canonical



iDoc

```
ISA*00* *01* *07*007PL
GS*PO*222224043588*TRACELINK*20131020*14201015*615
ST*00*000000001-
BEG*00*KN*194733208**20120709-
CUR*BY*CAD-
REF*PO*1310733208-
REF*VM*0196733208-
FOB*PP*CI*INCO2 Free Text 2-
FOB*PP*DE*INCO1 Free Carrier 1-
SAC*AL*TR**24200*1.25****02-
ITD*01*31.25***20231125*30**20231215*5525*100-
ITD*14*31***20231225*45**20231225*5525*100-
DTH*01*20231125*1230-
DTH*002*20120701*1230-
DTH*035*20180710*1230-
DTH*010*20120101*0201-
DTH*061*20180710*1501-
DTH*011*20120522*1611-
N1*ST*GHER TO PARTY (04/SH)*02*0004000050-
N3*Central 101*Local, WST-190, E-
N4*Stein*G*44a332*CH-
N1*BY*Wholesale Inc*01*0001000285-
N3*7956 VICTORY*Suite 2-
N4*BASE*G*4002*CH-
N1*BT*Wholesale Inc*11*3333331013655-
N3*555 Neelan Road*Suite 123-
N4*Sacramento*CA*95833*US-
N1*SU*SUPP.ITER*WEXOR (LS/SU)*91*0001000285-
```

# Transforms drive asynchronous integration, enabling efficient data exchange across systems and partners regardless of transaction format

## Transform Fundamentals

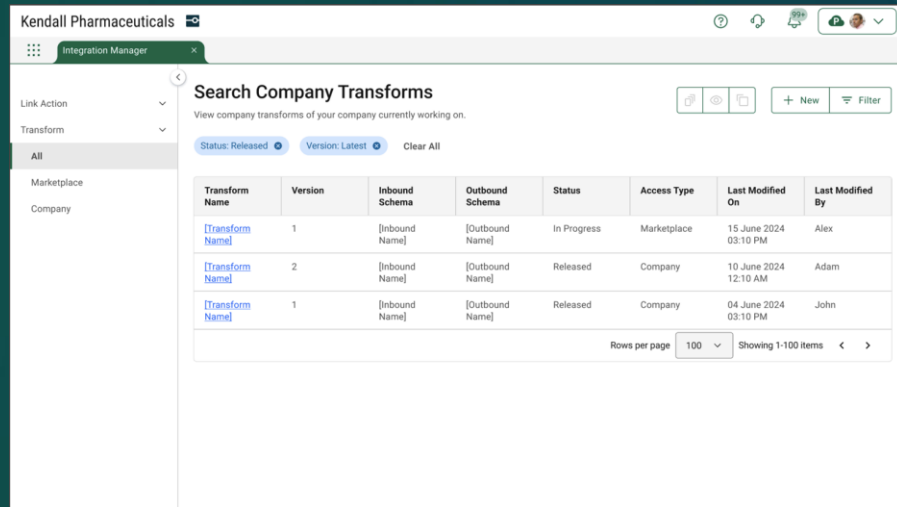
- Transform and adapt any business process into Opus-native Canonical format
- Interact seamlessly with your partners, without the need for them to understand your internal formats, or you theirs
- Transforms enable rich UI experiences, allowing you to fully configure the look and feel of your data as it is presented to members of your company and your partners

## Transform Catalog

- Marketplace catalog provides access to a wealth of Transforms to suit many business needs right out of the box
- Company catalog allows your company to create, manage, and promote transforms through the development, validation, and production deployment processes using the power of Opus Workflows

## Transform Configuration

- Transforms can be configured in used in many situations, from your standard data transformation to Canonical format, to business-process specific uses such as assigning certain data to a Process Network



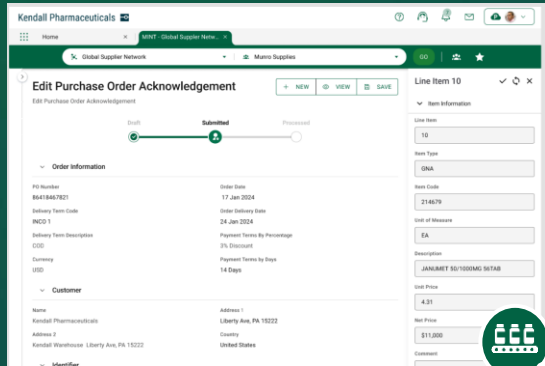
The screenshot displays the 'Kendall Pharmaceuticals' Integration Manager interface. The main section is titled 'Search Company Transforms' and shows a list of transforms. The interface includes a sidebar with navigation options like 'Link Action', 'Transform', 'All', 'Marketplace', and 'Company'. The main content area has filters for 'Status: Released' and 'Version: Latest', and a 'Clear All' button. The table below lists three transforms with columns for Transform Name, Version, Inbound Schema, Outbound Schema, Status, Access Type, Last Modified On, and Last Modified By.

Transform Name	Version	Inbound Schema	Outbound Schema	Status	Access Type	Last Modified On	Last Modified By
[Transform Name]	1	[Inbound Name]	[Outbound Name]	In Progress	Marketplace	15 June 2024 03:10 PM	Alex
[Transform Name]	2	[Inbound Name]	[Outbound Name]	Released	Company	10 June 2024 12:10 AM	Adam
[Transform Name]	1	[Inbound Name]	[Outbound Name]	Released	Company	04 June 2024 03:10 PM	John

Rows per page: 100 | Showing 1-100 items

The MINT UI enables companies without integrations to view and generate B2B messages as if fully integrated, ensuring seamless participation in business processes.

## MINT UI



## TraceLink

```

{
  "id": "57cd4683-2:87-4-3-0-0-0-0-0-0-0",
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    "controlFileHeader": {
      "fileReceiverNumber": "GLN:777776067344",
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        "edifactMessageHeader": {
          "messageControlNumber": "1",
          "associationCode": "ORDERS",
          "edifactMessageVersionCode": "00",
          "messageReleaseNumber": "06A",
          "controllingAgency": "EDIFACT"
        },
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          "agentPasswordType": "REFERENCE",
          "taxEncodingIdentifier": "UN08",
          "acknowledgmentRequired": 1,
          "encodingVersionString": "3",
          "fileSenderType": {
            "envelopePartyType": "GLN"
          },
          "edifactReceiverType": {
            "edifactPartyType": "GLN"
          }
        }
      }
    }
  }
}
    
```

tracelink.

IDoc

```

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<MANDT>300</MANDT>
<DOCNUM>000000134206118</DOCNUM>
<DOCREL>700</DOCREL>
<IDOCPTY>ORDERS05</IDOCPTY>
<STDX/>
<STDMES>EDIv6</STDMES>
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<SNDPFC>LS</SNDPFC>
<SNDPRN>TLPRN300</SNDPRN>
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<RCVPOR>MUNROLS300</RCVPOR>
<RCVPR1>LS</RCVPR1>
<RCVPRN>MUNROCL300</RCVPRN>
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<REFINT>Ref2IntchFile</REFINT>
<REFGRP>Ref2IntchGrp</REFGRP>
<REFMES>Ref2Msg</REFMES>
<ARCKEY>EDIActiveKey</ARCKEY>
    
```

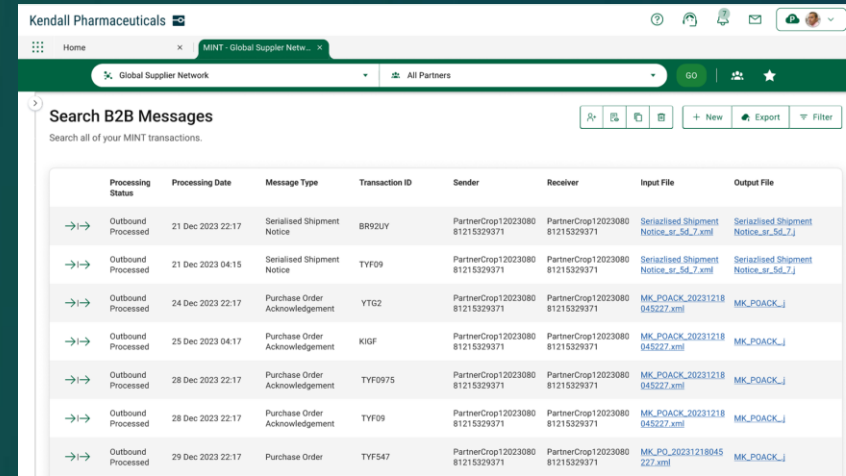
SAP IDoc ORDERS05

ERP

# The MINT UI enables companies without integrations to view and generate B2B messages as if fully integrated, ensuring seamless participation in business processes.

The MINT User Experience offers a comprehensive view into B2B Messages, with various methods including Link Actions, file-based solutions (AS2, SFTP), and the intuitive UI. All your B2B Messages come together in a unified, user-friendly interface, streamlining your business processes.

But that's not all—the MINT User Experience also serves as an integration powerhouse. Users can effortlessly interact with B2B Messages, make updates, and even generate new ones directly from within the platform.



The screenshot displays the MINT UI interface for Kendall Pharmaceuticals. The page title is "Search B2B Messages" and it includes a search bar and navigation options like "+ New", "Export", and "Filter". Below the search bar is a table listing various B2B messages.

Processing Status	Processing Date	Message Type	Transaction ID	Sender	Receiver	Input File	Output File
→ → Outbound Processed	21 Dec 2023 22:17	Serialized Shipment Notice	BR92LV	PartnerCrop12023080 81215329371	PartnerCrop12023080 81215329371	Serialized Shipment Notice_sr_5d_7.xml	Serialized Shipment Notice_sr_5d_7.j
→ → Outbound Processed	21 Dec 2023 04:15	Serialized Shipment Notice	TYF09	PartnerCrop12023080 81215329371	PartnerCrop12023080 81215329371	Serialized Shipment Notice_sr_5d_7.xml	Serialized Shipment Notice_sr_5d_7.j
→ → Outbound Processed	24 Dec 2023 22:17	Purchase Order Acknowledgement	YTG2	PartnerCrop12023080 81215329371	PartnerCrop12023080 81215329371	MK_POACK_20231218 045227.xml	MK_POACK.j
→ → Outbound Processed	25 Dec 2023 04:17	Purchase Order Acknowledgement	KIGF	PartnerCrop12023080 81215329371	PartnerCrop12023080 81215329371	MK_POACK_20231218 045227.xml	MK_POACK.j
→ → Outbound Processed	28 Dec 2023 22:17	Purchase Order Acknowledgement	TYF0975	PartnerCrop12023080 81215329371	PartnerCrop12023080 81215329371	MK_POACK_20231218 045227.xml	MK_POACK.j
→ → Outbound Processed	28 Dec 2023 22:17	Purchase Order Acknowledgement	TYF09	PartnerCrop12023080 81215329371	PartnerCrop12023080 81215329371	MK_POACK_20231218 045227.xml	MK_POACK.j
→ → Outbound Processed	29 Dec 2023 22:17	Purchase Order	TYF547	PartnerCrop12023080 81215329371	PartnerCrop12023080 81215329371	MK_PO_20231218045 227.xml	MK_POACK.j

# Key Takeaways

- **Flexible Integration Methods:** OSE offers multiple integration options—Link Actions, file-based integrations, and the MINT UI—allowing businesses to choose the method that best fits their scale and complexity.
- **Real-Time API Integrations:** Link Actions enable efficient, real-time data syncing via APIs, minimizing manual intervention with built-in polling capabilities.
- **Consistent Data Exchange with Transforms:** Regardless of integration method, all transactions are converted into a canonical form leveraging the power of Transforms, facilitating seamless interoperability.
- **Adaptable Integrations:** By harnessing the power of Transforms in partnership with the Canonical format, recipients seamlessly obtain data in their preferred format, delivering the promise of the Integrate Once™ model and unlocking effortless connectivity.
- **Comprehensive Catalog Management:** Out-of-the-box Transforms and Link Actions can be combined for a simplified startup process while ensuring flexibility in data exchange through further configuration.







# Opus Reports & Dashboards

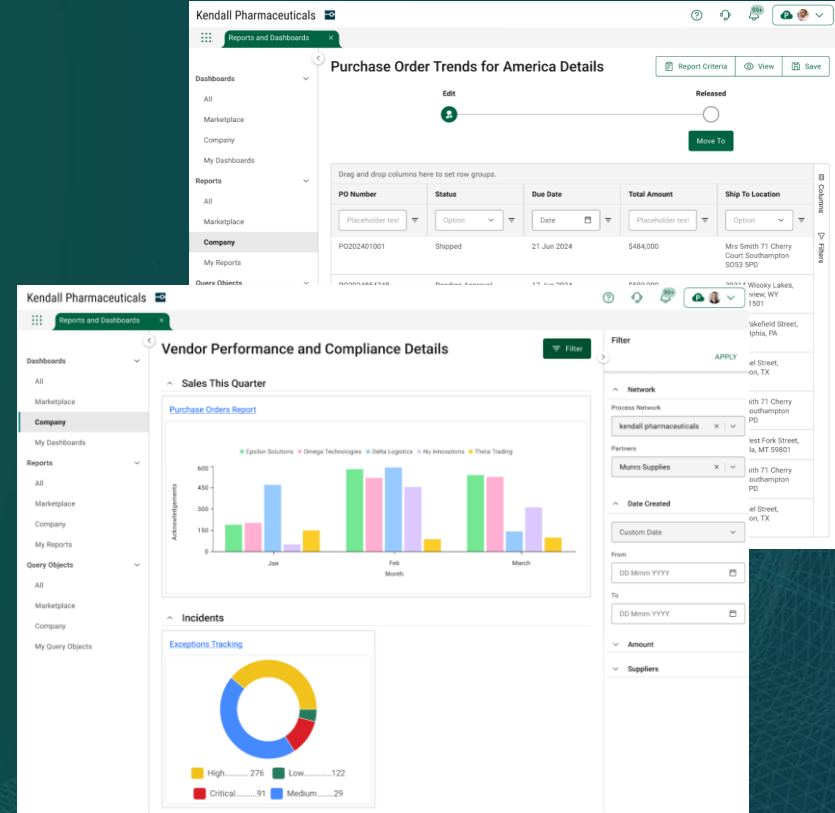
Harmonizing Orchestration Data for Supply Chain Insights  
with Saurabh Calla



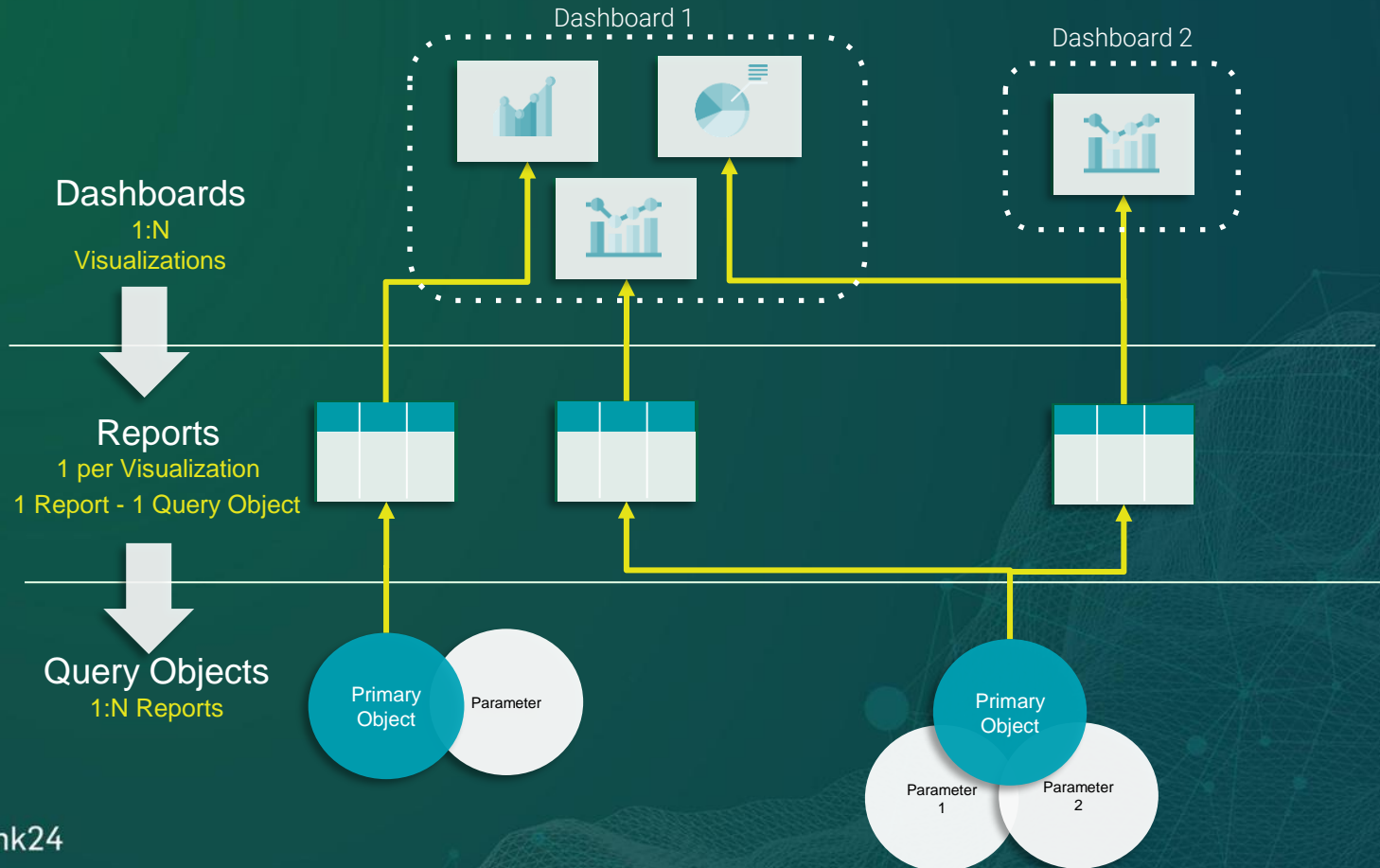
# TraceLink Administrators configure query objects, reports, and dashboards, providing users with critical supply chain insights to support informed decision-making

**TraceLink Administrators** can configure and manage reports and dashboards that provide actionable insights to help organizations reach their goals. TraceLink Administrators can create query objects, report definition, reports, and dashboards for themselves and users at their company. They even share them on the TraceLink Marketplace.

**Users** that can tap into these insights will be better enabled when it comes to decision making. They typically have a deep understanding of supply chain orchestrations and need the right information to make the right choices.



# Dashboards visualize the flow of information from query objects to reports, harnessing data-driven insights across multiple process networks



# Reports and Dashboards are easily accessible within the user interface in proximity to other solutions

The screenshot displays the user interface for Kendall Pharmaceuticals. On the left, a navigation menu lists various sections: My Networks, Partner Networks, Reports and Dashboards (highlighted with a red box), Bahrain Compliance, Digital Recalls, Indonesia Compliance, Product Information Exchange, RU BAFS Compliance, Solution Designer, Transform Catalog, UAE Compliance, and UZ Compliance. The main content area shows the 'Company Dashboards' page, which includes a table of active dashboards.

Dashboard Name	Status	Description	Version	Last Modified	Last Modified By
<a href="#">Purchase Order Summary</a>	Released	Track all your purchase orders	1	15 May 2024 9:30 AM	Leo Hamilton
<a href="#">Incidents</a>	Edit	Incident Tracking	2	11 May 2024 11:22 AM	Max Vettel
<a href="#">Incident Severity Analysis</a>	Released	This report identifies trends and patterns in incident data...	1	9 May 2024 3:35 PM	Lando Norris
<a href="#">Vendor Comparison Dashboard</a>	Edit	This compares the performance of multiple vendors...	1	28 Apr 2024 1:45 PM	Mark Webber
<a href="#">PO Spend Analysis</a>	Edit	This provides insights into spending patterns...	2	21 Apr 2024 6:30 PM	Serigo Perez
<a href="#">Procurement Efficiency</a>	Released	This assesses the efficiency of the procurement proce...	3	19 Apr 2024 8:35 PM	Mark Wood

# Query objects are essential data tools that can be configured to drive insights

Query Objects serve as the cornerstone for generating reports and dashboards.

Associate primary, secondary, tertiary, and quaternary objects (from an application) within Query Objects, establishing the foundation for subsequent reporting across multiple 1-N apps.

When creating Query Objects there is flexibility in creating a Query Objects from scratch, tailoring them to suit specific reporting requirements.

Alternatively, they can leverage existing Query Objects from their Company Catalog or the TraceLink Marketplace, expediting the process by manipulating pre-defined criteria

The image displays two screenshots of the Kendall Pharmaceuticals software interface. The top screenshot shows the 'Search Company Query Objects' page, which lists various query objects with columns for Name, Primary Object, Application Name, Version, Status, and Last Modified. A blue box highlights the 'New' button in the top right corner. The bottom screenshot shows the 'New Query Object' configuration page, which includes a progress bar with 'Edit', 'Test', and 'Released' stages, and a form for defining the query object's name, description, and relationships.

Query Object Name	Primary Object	Application Name	Version	Status	Last Modified
Invoice Summary	Invoice	Multienterprise Process Connect	1.0.0	Edit	15 Mar 2024 9:30 AM by Leo Hamilton
Incidents Summary Mar 24	Incident Tracking	Agil Process Teams	1.0.0	Released	11 Mar 2024 11:22 AM by Max Vettel
Annual Financial Summary	Material	Agil Process Teams	2.0.0	Test	9 Mar 2024 2:48 PM by Joe Do
Incidents	Incident Tracking	Serialized Operations Manager	1.0.0	Released	2 Mar 2024 10:27 AM by Jacob Tremblay
Invoice Tracking	Invoice	Serialized Product Intelligence	1.0.0	Edit	25 Feb 2024 11:30 AM by Mark Wood

**New Query Object**  
Create a new query object for company use.

Progress: Edit (selected) | Test | Released

**General**

Query Object Name: Purchase Order Transactions  
Select Application: Multienterprise Process Connect

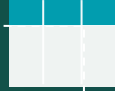
Description: Query to track PO in different contexts.  
Primary Object: Purchase Order

**Relationship**

Secondary Object: Location

Secondary Object: Products

# Reports provide critical data insights and can be used to analyze business process activities.



## Reports Features

- No code
- Add value independently and in larger dashboard context feeding dashboard elements
- Supports related objects
- Auto-generated search queries
- Simple filtering to limit columns (fields) and rows (records)
- Computed fields
- Interactive client-side result-set modifications handled in the browser for fast performance
- Report definitions are shared but executed under the context of the report consumer according to their company permissions.
- Data protected by user permissions and roles

Kendall Pharmaceuticals

Reports & Dashboards

### View Purchase Order Tracking Report

Edit Filter

Filter APPLY | CLEAR

Ship to Location Kendall Warehouse Libe... x

Add Filters Select Value

Status	Purchase Order Number	Due Date	Total Amount	Ship to Location
Shipped	PO202401001	21 Mar 2024	\$484,000	Kendall Warehouse Liberty Ave, PA 15222
	PO2024854748	25 Mar 2024	\$500,000	Kendall Warehouse Liberty Ave, PA 15222
	PO2024943839	25 Mar 2024	\$250,000	Kendall Warehouse Liberty Ave, PA 15222
<b>Total</b>	<b>3</b>		<b>\$123,4000</b>	
Pending Approval	PO209048569	4 Apr 2024	\$750,000	Kendall Warehouse Liberty Ave, PA 15222
	PO202401380	13 Apr 2024	\$200,000	Kendall Warehouse Liberty Ave, PA 15222
<b>Total</b>	<b>2</b>		<b>\$950,000</b>	
	PO2020478209	Pending Approval	22 Apr 2024	\$650,000 Kendall Warehouse Liberty Ave, PA 15222

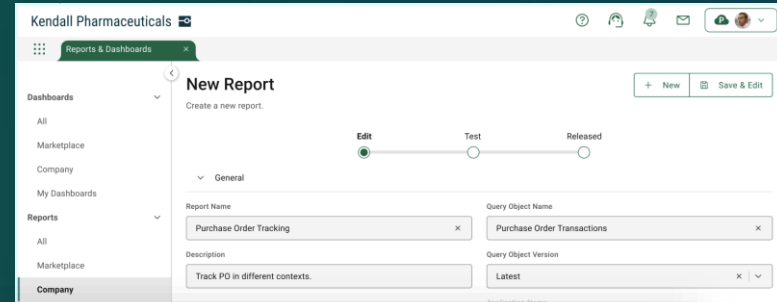
# Report criteria and definitions are configurable and directly shape reports

Reports are an amalgamation of saved **Report Criteria** and **Report Definition** (deriving from the Query Object) determine how and what to render in the report.

**Report Criteria** delineates the parameters and conditions that govern the information a user sees in the Report.

The available criteria chosen are used to determine how the report can be defined and can be previewed in Realtime when criteria is applied.

This includes, the filters to apply when retrieving the data, such as the Process Network and Partner or a specific time range.



Purchase Order Number	Status	Due Date	Total Amount	Ship to Location
PO202401001	Shipped	21 Mar 2024	\$484,000	Kendall Warehouse Liberty Ave, PA 15222
PO2024854748	Pending Approval	25 Mar 2024	\$500,000	Kendall Warehouse Liberty Ave, PA 15222
PO2024943839	Shipped	25 Mar 2024	\$250,000	Kendall Warehouse Liberty Ave, PA 15222
PO200947384	On Hold	27 Mar 2024	\$150,000	Kendall Warehouse Liberty Ave, PA 15222
PO209048569	Created	4 Apr 2024	\$750,000	Kendall Warehouse Liberty Ave, PA 15222
PO202401380	Pending Approval	13 Apr 2024	\$200,000	Kendall Warehouse Liberty Ave, PA 15222
PO202409035	Created	21 Apr 2024	\$100,000	Kendall Warehouse Liberty Ave, PA 15222

# Report criteria and definitions are configurable and directly shape reports

**Report Definition** determines the visual blueprint of the report, encompassing layout and data presentation preferences.

When a user defines a report, they are determining which of the criteria to show (or hide) and how to show it. If they want to save that definition as a Report, they select save and that report will be instantiated so it can be retrieved at any time.

The screenshot displays the 'Edit Purchase Order Tracking Report Definition' interface. The main content area shows a table of purchase orders with the following data:

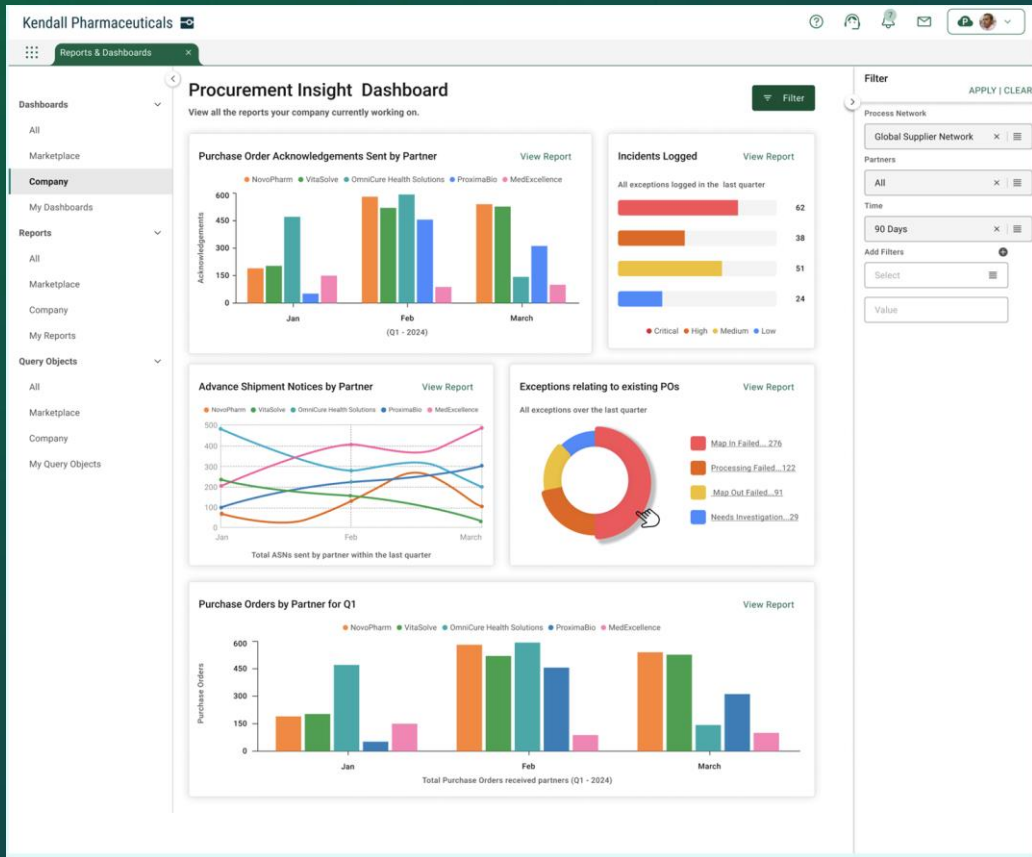
Purchase Order Number	Status	Due Date	Total Amount	Ship to Location
PO202401001	Shipped	21 Mar 2024	\$484,000	Kendall Warehouse Liberty Ave, PA 15222
PO2024854748	Pending Approval	25 Mar 2024	\$500,000	Kendall Warehouse Liberty Ave, PA 15222
PO2024943839	Shipped	25 Mar 2024	\$250,000	Kendall Warehouse Liberty Ave, PA 15222
PO200947384	On Hold	27 Mar 2024	\$150,000	Kendall Warehouse Liberty Ave, PA 15222
PO209048569	Created	4 Apr 2024	\$750,000	Kendall Warehouse Liberty Ave, PA 15222
PO202401380	Pending Approval	13 Apr 2024	\$200,000	Kendall Warehouse Liberty Ave, PA 15222
PO202409035	Created	21 Apr 2024	\$100,000	Kendall Warehouse Liberty Ave, PA 15222

The 'Report Definition' sidebar on the right includes the following configuration options:

- Group by: Status
- Select row: Select row
- Filters: Select Column
- Value: Value
- Columns: Search Column
- Columns list:  Purchase Order Number,  Status,  Due Date,  Total Amount,  Ship to Location
- Sort By:  Row Counts,  Detail Rows,  Sub Totals



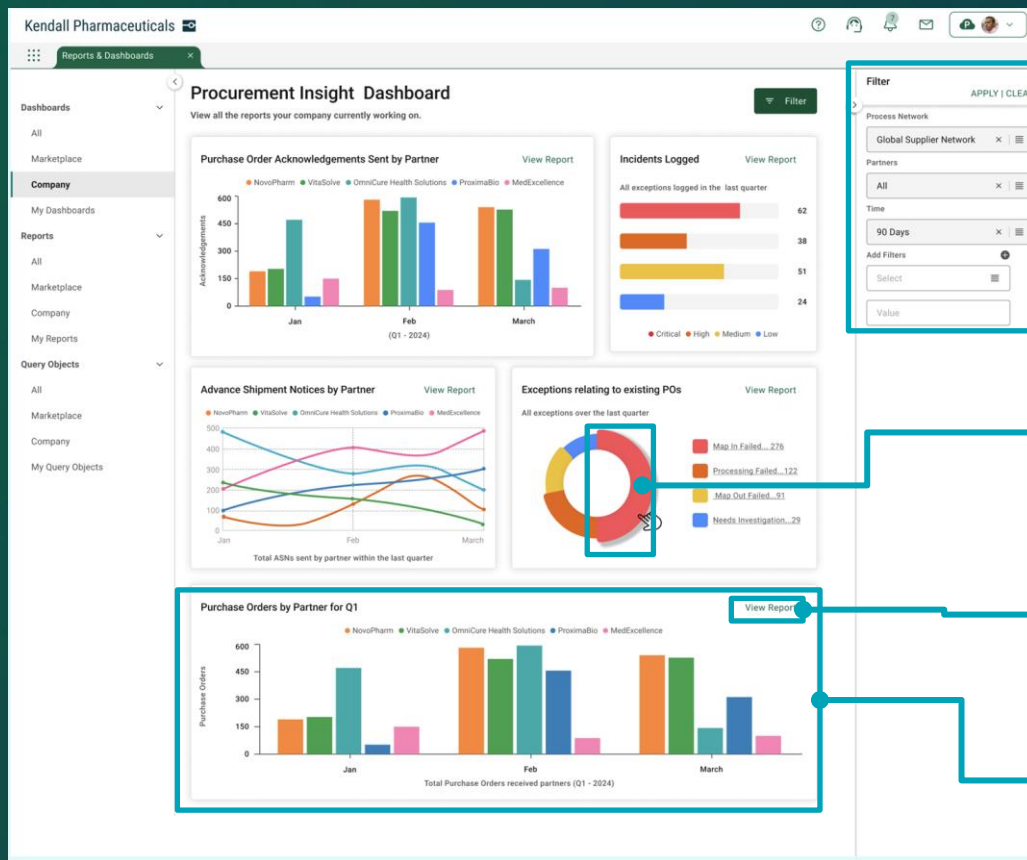
# Dashboards include rich and interactive visualizations that can be easily configured for preferred views



## Dashboards Features

- No code dashboards are collections of defined reports
- Maintains client-side interactivity
- Cross application view
- Reports linked to provide consistent view of data (1-N reports per dashboard element/visualization)
- 1-N dashboard elements per dashboard
- Data cached for performance
- Predefined filters established by Dashboard builders to allow filtering of data across the dashboard.

# Dashboards are designed with predefined elements that enable users to navigate from a high-level view to more granular report data



Dashboard Filters

Drill down report opens in new tab based on user's selection (e.g. only a report with Map In Failed exceptions)

Dashboard Report opens in new opus tab, with tabular report

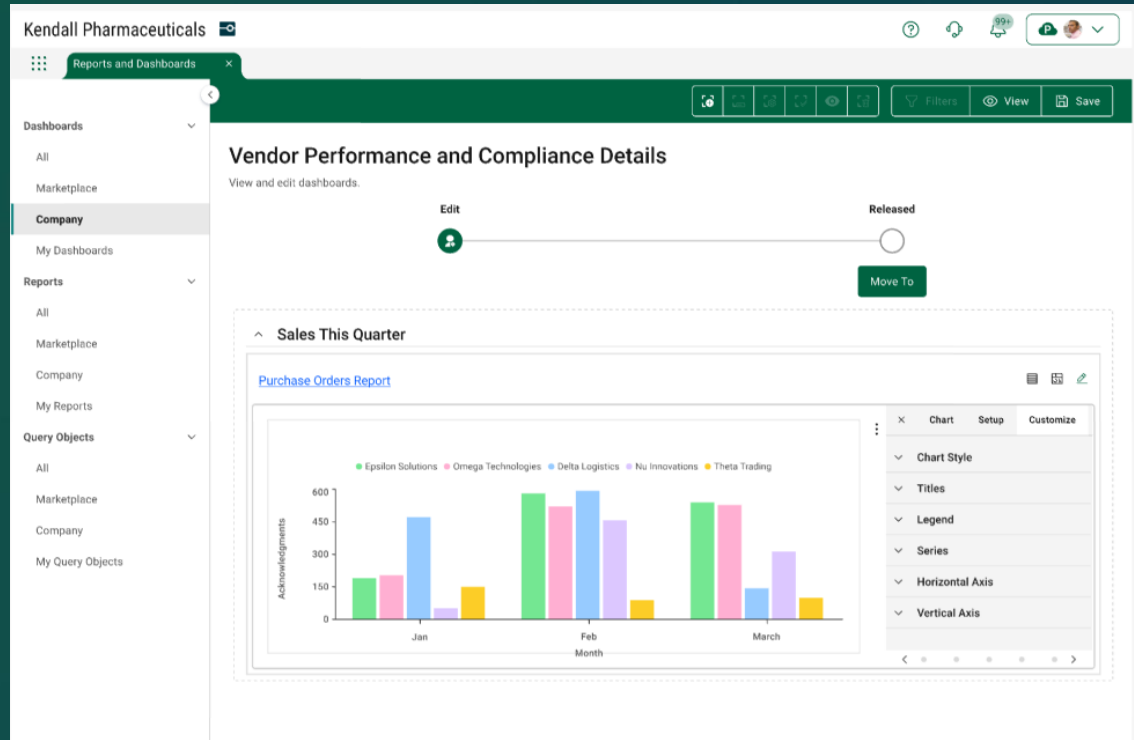
Dashboard Element pulls from report (e.g. Purchase Order Tracking)

# Dashboards are designed with predefined elements that enable users to navigate from a high-level view to more granular report data

Dashboards are comprised of multiple (1-N) **Dashboard Elements**. Each Dashboard Element represents a visual representation of a report - as a chart or a mini-table. Dashboard elements can be configured and added to the dashboard vertically.

The charts inside the Dashboard elements can be further configured by the Dashboard builder, including chart titles, colors, legend, axes configuration, etc.

Once saved, users can view and interact with the dashboard by filtering the data,, but can only change the Dashboard elements based on user permissions.

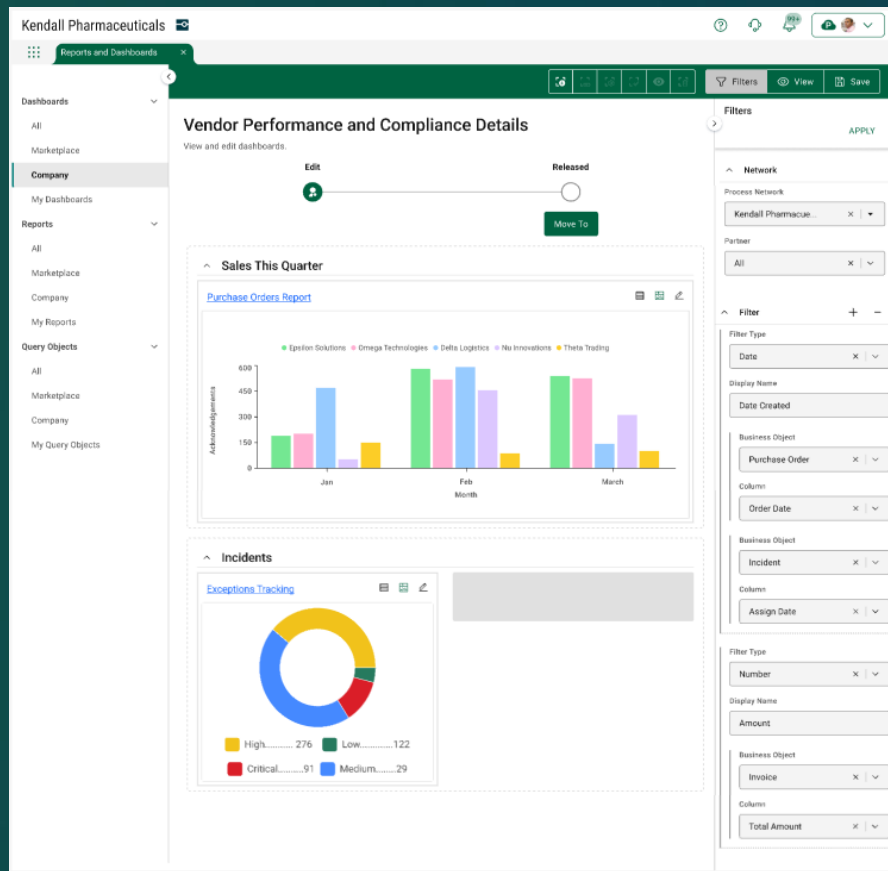


# Dashboards leverage operations that enable users to narrow results

Dashboard builders enable their end users to filter the data across the entire dashboard by pre-defined filters - **Dashboard Filters**.

These filters work across the objects representing the data, allowing a single filter to impact multiple Dashboard Elements. This provides a unified and consistent view of the data across the dashboard.

A key dashboard filter is the Process Network and Partner Selection - allowing a user to quickly toggle where the data is coming from for the entire dashboard.



# Query Objects, Reports, and Dashboards harness orchestration insights across your end-to-end supply chain

## 1 - Query Object

Supplier Performance Scorecard Details

View and edit query objects.

Query Object Name: Supplier Performance Scorecard

Application: Multienterprise Process Connect

Description: Provides a performance scorecard for suppliers.

Primary Object: Purchase Order

Relationship: Secondary Object: Invoice

## 2 - Reports (1-N)

Purchase Order Trends for America Details

PO Number	Status	Due Date	Total Amount
PO202401001	Shipped	21 Jun 2024	\$484,000
PO2024854748	Pending Approval	17 Jun 2024	\$590,000
PO2024943839	On Hold	09 Jun 2024	\$700,000
PO20209947384	Created	30 May 2024	\$230,000
PO20209048569	Pending Approval	28 May 2024	\$100,000
PO202406577	Created	24 May 2024	\$200,000
PO202408569	On Hold	21 May 2024	\$600,000
PO2024016477	Shipped	18 May 2024	\$300,000

## 3 - Dashboard elements (1-N)

Procurement Insight Dashboard

View all the reports your company currently working on.

- Purchase Order Acknowledgements Sent by Partner
- Incidents Logged
- Advance Shipment Notices by Partner
- Exceptions relating to existing POs
- Purchase Orders by Partner for Q1

# Key Takeaways

- **Administrators Configure Critical Insights:** TraceLink Administrators set up query objects, reports, and dashboards to deliver essential supply chain insights for informed decision-making.
- **Dashboards Visualize Orchestration Data:** Dashboards provide a clear view of information from query objects to reports, leveraging data across process networks for actionable insights.
- **Easy Access to Reports and Dashboards:** Reports and dashboards are conveniently located within the UI, integrated with other solutions for seamless navigation.
- **Configurable Reports and Criteria:** Reports and their criteria are fully configurable, allowing for detailed analysis of business processes.
- **Predefined Dashboard Structure:** Dashboards are designed with predefined elements and interactive visualizations, enabling users to navigate from high-level to granular data.

