TRACELINK UNIVERSITY

Configure TraceLink for Process Orchestration for Empowered Teams

Configure Process Orchestration for Empowered Teams

See the *Administer Help Center*Administer Help Center for information about how to configure Process Orchestration for Empowered Teams, link Partners, and add users.

Process network configuration overview

The Process Network configuration in POET defines how business objects such as Work Items, Items, and Compliance Exceptions behave within a process network. This configuration allows you to:

- Customize behavior for each object type
- Define prefixes for each object type
- Configure due dates and notifications
- Control outbound integrations

The configuration uses a modular structure where:

- Global settings apply at the process network level
- Object-specific settings are defined per object type using objectTypeConfigurations

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How to configure settings at the process network level

Settings at the process network level are applied globally to all objects used in the solution. However, object-specific settings are applied at individual object level and will override the process network settings.

To configure settings for the process network in POET, follow the steps listed below:

1. Send a POST request to:
   `POST https://{{host}}/api/events`
   with the following event name:
   `agile-process-teams:edit-process-network-config:v8`

2. To define the header, include the required metadata in the following format:

```
"header": {
  "headerVersion": 1,
  "eventName": "agile-process-teams:edit-process-network-
config:v8",
  "ownerId": "<owner-id>",
  "processNetworkId": "<process-network-id>",
  "appName": "agile-process-teams",
  "dataspace": "default"
}
```

3. Add general settings that apply to the entire process network in the following format:

```
"payload": {
```

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```
  "processNetworkId": "<process-network-id>",
  "enableNotificationForActionInitiator": true,
  "generalConfigurations": [
    {
      "configurationType":
"maxNumberOfRecentCommentsToInclude",
      "configurationValue": "3"
    }
  ]
}
```

4. Define behavior for each object type using `objectTypeConfigurations`. Each entry must include the `objectType` and `generalConfigurations`:

```
"objectTypeConfigurations": [
  {
    "objectType": "workItem",
    "generalConfigurations": [
      {
        "configurationType": "prefix",
        "configurationValue": "WI"
      },
      {
        "configurationType": "defaultDueDateInDays",
        "configurationValue": "5"
      }
    ]
  }
]
```

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5. Send the full payload to apply the configuration. Note that only the fields included in the request are updated.

How to configure settings at the object level

Object-specific settings are defined per object type using objectTypeConfigurations. These settings are particularly useful when a solution includes multiple object types that need custom settings as per business use. For example, the default due date for a compliance exception can be different from that of a change request. You can set the following configurations for every object type:

Configuration	Description
prefix	Display ID prefix (e.g., WI, DSCSA).
defaultDueDateInDays	Default due date from creation.
maxNumberOfRecentCommentsToInclude	Comments included in notifications.
outbound	Transform name and version.
outboundTransactionFlag	Enable or disable outbound transactions.
outboundB2BTransactionTypeName	Required for outbound transactions.
assignToUserB2BTransactionTypeName	Used for assignment-related transactions.

These settings allow you to control notifications, ID prefix, and outbound integration.

Sample Object Configurations

If your solution includes a single business object such as work item, then see the following sample configuration:

```
{
  "objectTypeConfigurations": [
    {
      "objectType": "workItem",
      "generalConfigurations": [
        {
          "configurationType": "maxNumberOfRecentCommentsToInclude",
          "configurationValue": "2"
```

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```
        },
        {
          "configurationType": "defaultDueDateInDays",
          "configurationValue": "5"
        },
        {
          "configurationType": "prefix",
          "configurationValue": "WI"
        },
        {
          "configurationType": "outbound",
          "configurationValue": "POET_WorkItemBOToCanonical:v3"
        },
        {
          "configurationType": "outboundTransactionFlag",
          "configurationValue": "false"
        },
        {
          "configurationType": "outboundB2BTransactionTypeName",
          "configurationValue": "APT_WORK_ITEM_ADVISEMENT"
        },
        {
          "configurationType": "assignToUserB2BTransactionTypeName",
          "configurationValue": "POET_WORK_ITEM_ASSIGN_TO_USER"
        }
      ]
    }
  ]
}
```

If your solution includes multiple business objects, then see the following sample configuration:

```
{
  "objectTypeConfigurations": [
    {
      "objectType": "workItem",
      "generalConfigurations": [
        {
          "configurationType": "maxNumberOfRecentCommentsToInclude",
          "configurationValue": "2"
        },
        {
          "configurationType": "defaultDueDateInDays",
```

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```
          "configurationValue": "5"
        },
        {
          "configurationType": "prefix",
          "configurationValue": "WI"
        },
        {
          "configurationType": "outbound",
          "configurationValue": "POET_WorkItemBOToCanonical:v3"
        },
        {
          "configurationType": "outboundTransactionFlag",
          "configurationValue": "false"
        },
        {
          "configurationType": "outboundB2BTransactionTypeName",
          "configurationValue": "APT_WORK_ITEM_ADVISEMENT"
        },
        {
          "configurationType": "assignToUserB2BTransactionTypeName",
          "configurationValue": "POET_WORK_ITEM_ASSIGN_TO_USER"
        }
      ]
    },
    {
      "objectType": "ext_TRACELINK_poetComplianceException",
      "generalConfigurations": [
        {
          "configurationType": "defaultDueDateInDays",
          "configurationValue": "5"
        },
        {
          "configurationType": "prefix",
          "configurationValue": "DSCSA"
        },
        {
          "configurationType": "outbound",
          "configurationValue":
"POET_ComplianceExceptionBOToCanonical:v2"
        },
        {
          "configurationType": "outboundTransactionFlag",
          "configurationValue": "false"
        },
        {
          "configurationType": "outboundB2BTransactionTypeName",
```


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```
          "configurationValue": "POET_COMPLIANCE_EXCEPTION_ADVISEMENT"
        },
        {
          "configurationType": "assignToUserB2BTransactionTypeName",
          "configurationValue":
"POET_COMPLIANCE_EXCEPTION_ASSIGN_TO_USER"
        }
      ]
    },
    {
      "objectType": "item",
      "generalConfigurations": [
        {
          "configurationType": "prefix",
          "configurationValue": "ITEM"
        }
      ]
    }
  ]
}
```

If your solution includes custom or marketplace object types, use the `ext_TRACELINK_` prefix. For example: `ext_TRACELINK_poetComplianceException`.

Sample API Configuration for Process Network and Object Configurations

The following is sample API configuration that includes settings at the process network level and the object level.

```
{
    "header": {
        "headerVersion": 1,
        "eventName": "agile-process-teams:edit-process-network-
config:v8",
        "ownerId": "{{ownerID}}",
        "processNetworkId": "{{processNetworkID}}",
        "appName": "agile-process-teams",
        "dataspace": "default"
    },
    "payload": {
        "processNetworkId": "{{processNetworkID}}",
        "enableNotificationForActionInitiator": true,
        "generalConfigurations": [
            {
                "configurationType":
"maxNumberOfRecentCommentsToInclude",
```

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```
                "configurationValue": "3"
            }
        ],
        "objectTypeConfigurations": [
            {
                "objectType": "workItem",// example for a base type
                "generalConfigurations": [
                    {
                        "configurationType":
"maxNumberOfRecentCommentsToInclude",
                        "configurationValue": "2"
                    }
                    {
                        "configurationType": "defaultDueDateInDays",
                        "configurationValue": "5"
                    },
                    {
                        "configurationType": "prefix",
                        "configurationValue": "WI"
                    },
                    {
                        "configurationType": "outbound",
                        "configurationValue":
"POET_WorkItemBOToCanonical:v3"
                    },
                    {
                        "configurationType":
"outboundTransactionFlag",
                        "configurationValue": "false"
                    },
                    {
                        "configurationType":
"outboundB2BTransactionTypeName",
                        "configurationValue":
"APT_WORK_ITEM_ADVISEMENT"
                    },
                    {
                        "configurationType":
"assignToUserB2BTransactionTypeName",
                        "configurationValue":
"POET_WORK_ITEM_ASSIGN_TO_USER"
                    }
                ]
            },
            {
                "objectType":
```

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```
"ext_TRACELINK_poetComplianceException",// example for a subtype
                "generalConfigurations": [
                    {
                        "configurationType": "defaultDueDateInDays",
                        "configurationValue": "5"
                    },
                    {
                        "configurationType": "prefix",
                        "configurationValue": "DSCSA"
                    },
                    {
                        "configurationType": "outbound",
                        "configurationValue":
"POET_ComplianceExceptionBOToCanonical:v2"
                    },
                    {
                        "configurationType":
"outboundTransactionFlag",
                        "configurationValue": "false"
                    },
                    {
                        "configurationType":
"outboundB2BTransactionTypeName",
                        "configurationValue":
"POET_COMPLIANCE_EXCEPTION_ADVISEMENT"
                    },
                    {
                        "configurationType":
"assignToUserB2BTransactionTypeName",
                        "configurationValue":
"POET_COMPLIANCE_EXCEPTION_ASSIGN_TO_USER"
                    }
                ]
            },
            {
                "objectType": "item",
                "generalConfigurations": [
                    {
                        "configurationType": "prefix",
                        "configurationValue": "ITEM"
                    }
                ]
            }
        ]
    }
}
```

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Assign Agile Process Teams roles

See the *Administer Help Center* for information about how to assign Agile Process Teams roles to users.

Roles

- Member - Expanded Access – Allows users from the Owner to view, add, edit, copy, close, reopen, and export processes (e.g. incidents, compliance exceptions, change requests). Also allows users to submit processes to Partners and submit initial and final responses to processes, if supported. These users see the Expanded Access dashboard on the Monitor screens.
- Partner Member – Allows users from external Partners to view, add, edit, copy, and download processes. Also allows users to submit initial and final responses to processes, if supported. These users see the Standard Access dashboard on the Monitor screens, with information limited further for Partners.

Set up notifications

All Process Orchestration for Empowered Teams users can sign up to receive email notifications based on certain events. See the Opus Platform Help Center for more information.

Notification types

- Item created – The users receive a notification when an item is created.
- Item assigned – The users receive a notification when an item is assigned to a user.
- Item modified – The users receive a notification when an item is modified.
- Item closed – The users receive a notification when an item is closed.
- Work item created – The users receive a notification when a work item is

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created.

- Work item assigned – The users receive a notification when a work item is assigned to a user.
- Work item modified – The users receive a notification when a work item is modified.
- Work item closed – The users receive a notification when a work item is closed.

Specify prefixes for display identifiers

When you create an instance using a business object such as item or work item, the instance shows a prefix in the display identifier. For example, the prefix for a work item instance named WI-123 is WI. An application administrator must specify this prefix for each business item when setting up Process Orchestration for Empowered Teams.

 Contact your TraceLink Services representative for more information about how to set up a prefix for business object.

Configure Number of Comments in Outbound Emails

When a business object is updated, Tracelink sends email notification with the comments and attachments for that business object. To configure the number of comments displayed in the outbound email, use the following API to specify the number of comments in the `maxNumberOfRecentCommentsToInclude` configuration type.

```
{
    "payload": {
        "prefix": "daac",
        "processNetworkId": "{{POET_processNetworkId}}",
        "generalConfigurations": [
          {
              "configurationType":
"maxNumberOfRecentCommentsToInclude",
              "configurationValue": "5"
```

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```
          }
        ]
        "objectTypeConfigurations": [
            {
                "objectType": "ext_TRACELINK_reviewBatchRecord",
                "generalConfigurations": [
                    {
                        "configurationType": "defaultDueDateInDays",
                        "configurationValue": "5"
                    },
                    {
                        "configurationType": "prefix",
                        "configurationValue": "BRRM"
                    },
                    {
                         "configurationType":
"maxNumberOfRecentCommentsToInclude",
                         "configurationValue": "5"
                    }
                ]
            }
        ]
    }
}
```

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