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Tasks and Sub-tasks

In the pharmaceutical supply chain, a change request is a formal proposal to modify an existing process, system, material, document, or equipment.

What is task management

Task Management in POET facilitates structured orchestration of collaborative workflows where a business outcome is achieved by executing a set of tasks, often requiring coordination between multiple stakeholders. Tasks may be broken into sub-tasks to reflect complex dependencies, ownership divisions, or staged execution logic.

- A Task is a unit of work with a defined objective, ownership, and timeline.
- A Sub-task is a decomposed part of a parent Task. It represents a finer-grained action that contributes to completing the overall Task.
 - Sub-tasks can be executed:
 - Sequentially (in a defined order)
 - In parallel (independent execution)
 - With dependencies (Sub-task B starts only after A is completed)

Advantages of task management


- **Workflow Management:** Enable structured tracking of multi-step, multi-party workflows.
- **Accountability:** Ensure responsibility and accountability across organizations.
- **Process Digitization and Standardization:** Digitize and standardize processes that are typically email- or spreadsheet-driven.
- **Dynamic and Dependency-Driven Execution:** Support dynamic process execution with dependency logic.
- **Auditability and Regulatory Alignment:** Enable auditability and compliance with pharma regulations.

How to configure the task management marketplace solution

Before using the product complaint marketplace solution, Solution Designers must first configure the solution in Opus Solution Environment (OSE) by following the steps listed below:

Save the marketplace solution as a company solution in OPUS Solution Environment

Solution Designers must first save the latest version of the marketplace solution from the marketplace catalog as a company solution.


1. Select the Main Menu  icon.
2. Select OPUS Solution Environment.
3. Select Catalog from the left menu.
4. Select Marketplace Solutions.
5. On the Search Solutions page, filter the list of solutions to find the required solution.
6. Find the latest version of the solution and select the Solution Name to open the solution.

7. On the Solution Details page, select Save As.
8. On the Save As panel, fill in the following fields:
 - a. Solution Name field - The name of the solution that will be saved as a company solution.
 - b. Description field - (Optional) The description of the solution.
9. Select Apply.

The marketplace will be saved as a company solution in the Available tab on the left menu.

Create a network for the solution in OPUS Administration


After saving the solution as a Company Solution, Solution designers must create a network for the solution from OPUS Administration.

1. Select the Main Menu  icon.
2. Select Administration.
3. Select Network and Apps from the left menu.
4. Select New.
5. In the Network Information section, fill in the following fields:
 - a. Application drop-down - Select the application for which you want to configure the marketplace solution. For e.g. Process Orchestration for Empowered Teams.
 - b. Network Name field - The name of the network being created.
 - c. Network Description field - (Optional) The description of the network being created.
6. In the Solution section, fill in the following fields:
 - a. Standard Solution toggle - This value must be no as the solution for which the network is being created is a marketplace solution.
 - b. Company Solution field - Select the solution that you saved as a company solution in the previous procedure.
7. Select Save.

The new network is created and the solution is ready for use.

Configure roles for the new network in OPUS Administration

After creating a network for the solution, Solution Designers must define roles for accessing the network.

1. Select the Main Menu  icon.
2. Select Administration.
3. Select Users from the left menu.
4. Select Network Members from the left menu.
5. On the Search Network Members page, filter the list of network members by the network created in the previous procedure.
6. Select the user email of the user who created the network.
7. Select Edit.
8. In the Roles section, select the role required to access the network.
9. Select Save.


The role to access the new network is configured.

For more information about configuring or customizing marketplace solutions as per your business needs, see [OPUS Solution Environment Help Center](#).

Add a task or sub-task

Add a task

By default, a task is created by a set of basic fields, which are widely used. However, depending on your business needs, you may need to include additional fields in the task. To include additional fields, [edit the task](#) to view all available fields and update the required fields.


1. Select the Main Menu  icon.
2. Select My Networks.
3. Select a [POET Network] from the Select your Network drop-down in the header.

4. Select a Partner or location from the Select your Partner or Location drop-down in the header.
5. Select Go.
6. Select Task from the left menu.
7. Select New.
8. In the General section fill in the following fields:
 - a. Title field - The title of the new task.
9. Select Save.

The task is created in the Draft state.
10. To move the task to To Do state, select Move to.

Add a sub-task


By default, a sub-task is created by a set of basic fields, which are widely used. However, depending on your business needs, you may need to include additional fields in the sub-task. To include additional fields, [edit the sub-task](#) to view all available fields and update the required fields.

1. Select the Main Menu  icon.
2. Select My Networks.
3. Select a [POET Network] from the Select your Network drop-down in the header.
4. Select a Partner or location from the Select your Partner or Location drop-down in the header.
5. Select Go.
6. Select Sub-Task from the left menu.
7. Select New.
8. In the General section fill in the following fields:
 - a. Title field - The title of the new sub-task.
9. Select Save.

The sub-task is created in the Draft state.
10. To move the sub-task to To Do state, select Move to.

Modify a task

Edit a task

1. Select the Main Menu  icon.
2. Select My Networks.
3. Select a [POET Network] from the Select your Network drop-down in the header.
4. Select a Partner or location from the Select your Partner or Location drop-down in the header.
5. Select Go.
6. Select Task from the left menu.
7. Select the Display Identifier of the task to edit.
8. Select Edit.

In addition to the fields updated when creating the task, additional fields will be displayed which can be updated if required.

9. In the General section update the following fields:
 - a. Display Identifier field - The display identifier of the task.
 - b. Title field - The title of the task.
 - c. Description field - The detailed description of the task.
 - d. Business Priority field - The level of priority for the task. Select from Low, Medium, High, and Critical.
 - e. Visibility field - Indicates who can view the task.
 - f. Tags field - Labels or keywords for easy classification and search.
10. If you require to view the sub-tasks linked to the task, see the Sub-Tasks section.
11. In the Closure Summary section, add information about the how the task was closed:
 - a. Resolution field - Specifies why the task was closed.
 - b. Closed By field - The person who marked the task as closed.
 - c. Closed Date field - The date and time when the task was closed
 - d. Closure Notes field - The summary of what was done to close the task.


12. In the User Activity section, add information about the impacted product in the following fields:
 - a. Created By field – The user who created the task.
 - b. Created On field – The time-stamp of task creation.
 - c. Last Modified By field – The user who most recently updated the task.
 - d. Last Modified On field – The time-stamp of last update.
13. In the Comments and Attachments section, add information in the following fields:
 - a. Comment Author field (auto-generated) – The name of the user who entered the comment.
 - b. Last Modified field – Displays the date and time when the comment was last modified.
 - c. Comment Text field – Text of the comment.
 - d. Attachments field – Name of the file attached.
14. The Followers section displays names of the users who are following the task.
15. Select Save.

The task is updated.



Owners can edit the Assignee Details section while the batch record review is in the Draft state. Once the work item moves to the To Do state, the Assignee Details section can be edited only once.

Edit a sub-task

1. Select the Main Menu  icon.
2. Select My Networks.
3. Select a [POET Network] from the Select your Network drop-down in the header.
4. Select a Partner or location from the Select your Partner or Location drop-down in the header.
5. Select Go.
6. Select Sub-Task from the left menu.
7. Select the Display Identifier of the task to edit.

8. Select Edit.

In addition to the fields updated when creating the sub-task, additional fields will be displayed which can be updated if required.

9. In the General section update the following fields:

- a. Display Identifier field – The display identifier of the sub-task.
- b. Title field – The title of the sub-task.
- c. Description field – The detailed description of the sub-task.
- d. Parent Task ID field – The ID of the parent task.
- e. Business Priority field – The level of priority for the sub-task. Select from Low, Medium, High, and Critical.

10. If you require to collaborate with an external partner, enter the following Initiator Company details under the Participants section:

- a. Business Name field – The name of the company that created the sub-task.
- b. Identifier Type field – The identifier type of the initiator company.
- c. Identifier Value field – The value of the identifier.

11. If you require to collaborate with an external partner, enter the following Assignee Company details under the Participants section:

- a. Business Name field – The name of the Partner company that is assigned to take action on the sub-task.
- b. Identifier Type field – The identifier type of the assignee company.
- c. Identifier Value field – The value of the identifier.

12. In the Owner section, add information about the user who owns the sub-task:

- a. Email field – The email address of the user who owns the task.
- b. Name field – The name of the user who owns the task.

13. In the Assignee User section, add information about the user to whom the sub-task is assigned:

- a. Email field – The email address of the person to whom the sub-task is currently assigned.
- b. Name field – The name of the person to whom the sub-task is currently

assigned.

14. In the Schedule & Timeline section, add information about the timeline of the sub-task in the following fields:
 - a. Planned Start Date field - The date when work on the sub-task is planned to begin.
 - b. Planned End Date field - The expected completion date of the sub-task.
 - c. Actual Start Date field - The actual date when the sub-task started.
 - d. Actual End Date field - The actual date when the sub-task was completed.
15. In the Dependencies section, add information about dependent sub-tasks:
 - a. Depends On field - Indicates any sub-task that must be completed before this one starts.
16. In the Documentation section, add information about any documents related to the sub-task:
 - a. Related Documents field - Document relevant to the sub-task.
17. In the Closure Summary section, add information about the how the sub-task was closed:
 - a. Resolution field - Specifies why the sub-task was closed.
 - b. Closed By field - The person who marked the sub-task as closed.
 - c. Closed Date field - The date and time when the sub-task was closed
 - d. Closure Notes field - The summary of what was done to close the sub-task.
18. In the Comments and Attachments section, add information in the following fields:
 - a. Comment Author field (auto-generated) - The name of the user who entered the comment.
 - b. Last Modified field - Displays the date and time when the comment was last modified.
 - c. Comment Text field - Text of the comment.
 - d. Attachments field - Name of the file attached.

19. The Followers section displays names of the users who are following the sub-task.

20. Select Save.

The sub-task is updated.



Owners can edit the Assignee Details section while the batch record review is in the Draft state. Once the work item moves to the To Do state, the Assignee Details section can be edited only once.

Tasks workflow

The following workflow states are used to track the progress of a task:

Base State	Workflow State	Description
To Do	To Do	The task has been defined and is ready to begin, but no active work has started yet.
In Progress	In Progress	The task is actively being worked on by the owner company or, where applicable, by partners through related sub-tasks.
In Progress	On Hold	The task is temporarily paused due to a dependency, missing information, or resource constraints.

Base State	Workflow State	Description
Done	Done	The task has been completed or otherwise closed with a valid final outcome.

Sub-tasks workflow

The following workflow states are used to track the progress of a sub-task:


Base State	Workflow State	Description
Draft	Draft	The subtask has been created and is still being defined. Additional refinement or information may be needed before work can begin.
To Do	To Do	The subtask has been reviewed, finalized, and assigned to the responsible party, and is awaiting the start of work.
In Progress	In Progress	Work on the subtask has started and is actively being carried out.

Base State	Workflow State	Description
In Progress	On Hold	Progress on the subtask is temporarily paused due to dependencies, pending approvals, missing information, or required external input.
Done	Closed	The subtask has been closed, with the specific closure outcome, such as completed or no longer required, recorded separately.

Monitor tasks

A high level understanding of the state of all product complaints that you have access to.

View the tasks dashboard (Owner)


1. Select the Main Menu  icon.
2. Select My Networks.
3. Select a [POET Network] from the Select your Network drop-down in the header.
4. Select a Partner or location from the Select your Partner or Location drop-down in the header.
5. Select Go.
6. Select Tasks Dashboard from the left menu.

View the widgets in the dashboard, which display pre-defined queries to

demonstrate the state of all tasks at a high level.

Metric	Description
Status - Open	Tasks classified by status (Draft, To Do, In Progress).
Business Priority	Tasks classified by business priority (Critical, High, Medium, Low)
Visibility	Tasks classified by the type of visibility (Internal Only, Partner Shared, Multi-Partner Shared).
Closure Reasons	Tasks classified by the reasons for closure (Completed Successfully, Cancelled, Superseded, Incomplete but Closed, Duplicate).
Task Aging	Tasks classified by the average number of days between Created On and Closed Date.
Due Date Monitoring	
Overdue Tasks	Tasks past Due Date by currentState. Escalates compliance and execution risks.
Due in Next 24 Hours	Tasks due within 24 hours by currentState. Highlights items requiring immediate executive attention.
Due in Next 7 Days	Tasks due within 7 days by currentState. Supports short-term workload planning.
Due in Future	Tasks due beyond 7 days by currentState. Supports capacity forecasting.

View the tasks dashboard (Partner)


1. Select the Main Menu  icon.
2. Select My Networks.
3. Select a [POET Network] from the Select your Network drop-down in the header.
4. Select a Partner or location from the Select your Partner or Location drop-down in the header.
5. Select Go.
6. Select Tasks Dashboard from the left menu.

View the widgets in the dashboard, which display pre-defined queries to demonstrate the state of all tasks at a high level.

Metric	Description
Status - Open	Tasks classified by status (Draft, To Do, In Progress).
Business Priority	Tasks classified by business priority (Critical, High, Medium, Low)
Visibility	Tasks classified by the type of visibility (Internal Only, Partner Shared, Multi-Partner Shared).
Closure Reasons	Tasks classified by the reasons for closure (Completed Successfully, Cancelled, Superseded, Incomplete but Closed, Duplicate).

Metric	Description
Task Aging	Tasks classified by the average number of days between Created On and Closed Date.
Due Date Monitoring	
Overdue Tasks	Tasks past Due Date by currentState. Escalates compliance and execution risks.
Due in Next 24 Hours	Tasks due within 24 hours by currentState. Highlights items requiring immediate executive attention.
Due in Next 7 Days	Tasks due within 7 days by currentState. Supports short-term workload planning.
Due in Future	Tasks due beyond 7 days by currentState. Supports capacity forecasting.

Search tasks

1. Select the Main Menu  icon.
2. Select My Networks.
3. Select a [POET Network] from the Select your Network drop-down in the header.
4. Select a Partner or location from the Select your Partner or Location drop-down in the header.
5. Select Go.
6. Select Task from the left menu.
7. Select Filter.


8. In the Filters panel, fill in one or more of the following fields to filter the results:
 - a. Display Identifier field - The display identifier of the task.
 - b. Title field - The title of the task.
 - c. State field - The state of the task.
 - d. Created By field - The name of the person who created the task.
 - e. Creation Time field - The timestamp when the task was created.
 - f. Due Date field - The due date for task completion.
 - g. Tags field - The labels or keywords associated with the task.
 - h. Business Priority field - The level of priority for the task. Select from Low, Medium, High, and Critical.

i. Last Modified Date field - The date when the task was last modified.

9. Select Apply.

All tasks matching the filter criteria are displayed.

View the sub-tasks dashboard (Owner)


1. Select the Main Menu  icon.
2. Select My Networks.
3. Select a [POET Network] from the Select your Network drop-down in the header.
4. Select a Partner or location from the Select your Partner or Location drop-down in the header.
5. Select Go.
6. Select Sub-Tasks Dashboard from the left menu.

View the widgets in the dashboard, which display pre-defined queries to demonstrate the state of all sub-tasks at a high level.

Metric	Description
Status - Open	Sub-tasks classified by status (Draft, To Do, In Progress).
Business Priority	Sub-tasks classified by business priority (Critical, High, Medium, Low)
On Hold	Sub-tasks classified by the On Hold status count.
Without Owner	Sub-tasks that do not have an owner assigned.
Partner	Sub-tasks classified by the Partner organization combined with status.
Dependent Sub-Tasks Stuck	Sub-tasks in which dependencies are not completed but the work has started.
Closure Reasons Analysis	Sub-tasks classified by the reason for closure (Completed, No Longer Required, Duplicate, Cancelled, Cancelled Parent Task, Cancelled by User, Obsolete Requirement).
Due Date Monitoring	
Overdue Sub-tasks	Sub-tasks past Due Date by currentState. Escalates compliance and execution risks.
Due in Next 24 Hours	Sub-tasks due within 24 hours by currentState. Highlights items requiring immediate executive attention.
Due in Next 7 Days	Sub-tasks due within 7 days by currentState. Supports short-term workload planning.

Metric	Description
Due in Future	Sub-tasks due beyond 7 days by currentState. Supports capacity forecasting.


View the sub-tasks dashboard (Partner)

1. Select the Main Menu  icon.
2. Select My Networks.
3. Select a [POET Network] from the Select your Network drop-down in the header.
4. Select a Partner or location from the Select your Partner or Location drop-down in the header.
5. Select Go.
6. Select Sub-Tasks Dashboard from the left menu.

View the widgets in the dashboard, which display pre-defined queries to demonstrate the state of all sub-tasks at a high level.

Metric	Description
Status - Open	Sub-tasks classified by status (Draft, To Do, In Progress).
Business Priority	Sub-tasks classified by business priority (Critical, High, Medium, Low)
Overdue Sub-Tasks	Sub-tasks classified by due date (due or past due).
On Hold	Sub-tasks classified by the On Hold status count.
Without Owner	Sub-tasks that do not have an owner assigned.
Dependent Sub-Tasks Stuck	Sub-tasks in which dependencies are not completed but the work has started.
Due Date Monitoring	
Overdue Sub-tasks	Sub-tasks past Due Date by currentState. Escalates compliance and execution risks.
Due in Next 24 Hours	Sub-tasks due within 24 hours by currentState. Highlights items requiring immediate executive attention.
Due in Next 7 Days	Sub-tasks due within 7 days by currentState. Supports short-term workload planning.
Due in Future	Sub-tasks due beyond 7 days by currentState. Supports capacity forecasting.

Search sub-tasks

1. Select the Main Menu  icon.
2. Select My Networks.
3. Select a [POET Network] from the Select your Network drop-down in the

header.

4. Select a Partner or location from the Select your Partner or Location drop-down in the header.
5. Select Go.
6. Select Sub-Task from the left menu.
7. Select Filter.
8. In the Filters panel, fill in one or more of the following fields to filter the results:
 - a. Display Identifier field - The display identifier of the sub-task.
 - b. Title field - The title of the sub-task.
 - c. State field - The state of the sub-task.
 - d. Creation Time field - The timestamp when the sub-task was created.
 - e. Initiator Company field - The name of the company who initiated the sub-task.
 - f. Assignee Company field - The name of the company to whom the sub-task is assigned.
 - g. Due Date field - The due date for sub-task completion.
 - h. Parent Task ID field - The ID of the parent task.
 - i. Business Priority field - The level of priority for the sub-task. Select from Low, Medium, High, and Critical.
 - j. Last Modified field - The date when the sub-task was last modified.
9. Select Apply.

All sub-tasks matching the filter criteria are displayed.

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