



## TRACELINK UNIVERSITY

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Items


An Item is a lightweight object instance in Process Orchestration for Empowered Teams, that allows businesses to leverage a simplified object without predefined application functionality, enabling them to model subtypes tailored to their specific needs. Companies can use Items for internal collaboration on tasks which are not time-bound, such as optimizing an inventory management system.

For example, company A (Retailer) uses POET Item to optimize its inventory management system by fostering seamless collaboration across the Supply Chain, IT, and Sales teams. Tasks are clearly defined, with real-time updates and shared responsibilities documented in a centralized platform. The Supply Chain team analyzes inventory trends, the IT team integrates software tools, and the Sales team provides demand insights, all coordinated through POET Item to ensure progress and accountability. This approach enables Company A to create an adaptive, data-driven inventory management system that reduces inefficiencies, responds to real-time changes, and aligns with business goals.

## **Create an item**

Create and configure an item to track internal operations or to collaborate with an external partner and exchange data.

**Create an item**

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 Item from the left menu.
6. Select New.
7. In the General section fill in the Title and Due Date.
8. Optionally, in the Comments and Attachments section, add a comment in the Comment Text field or attach a file under Attachment.
9. Select Save.  
The item is created in the Draft state.

10. To move the item to To Do state, select the Move to  button.



## Tips

- Configure a prefix for item when setting up Process Orchestration for Empowered Teams. For more information about configuring prefixes, see [Specify prefixes for display identifiers](#).
- If a Partner creates an item, they do not have the option to add an Assignee company, as the Assignee company is set to the Owner's company by default.
- In the Comments and Attachments section, do one of the following
  - Select the Add icon, to add comments and attachments.
  - Select the Delete icon, to remove comments and attachments.
- Attachments cannot be added without a comment.


## Modify an item

Edit an item, close an item that is complete, or delete an item that is no longer required.

### Edit an item


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 Item from the left menu.
6. Select the Display Identifier of the item to edit.
7. Select the Edit  button.
8. Update the required information.
9. Select Save.


The item is updated.

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

### Move an item to done



When the item's investigation is complete and an acceptable final response has been provided, the item can be moved to the Done state from the To Do or In Progress state.

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 Item from the left menu.
6. Select the Display Identifier of the item.
7. Select the Move to  button under the Done state.  
The item will be moved to the Done state.

### **Delete an item**

When an item is no longer required or created incorrectly, it can be deleted.

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 Item from the left menu.
6. Select the item row from the list.
7. Select the Delete  button.
8. Select Apply on the confirmation prompt.  
The item will be deleted.





An item cannot be recovered once it is deleted.

## **Monitor items**

Monitor items at a high level to understand the state of all items that you have access to.


### **Search items**

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 Item from the left menu.
6. Select the Filter  button.
7. 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 item.
  - b. State field - The state in which the item is, such as Draft, To Do, In Progress, or Done.
  - c. Initiator Company field - The company that has created the item.
  - d. Title field - The title of the item.
  - e. Last Modified field - The period of time in which the item was last updated.
8. Select Apply.

A list of items is displayed based on the filter results.

### **Add comments and attachments**

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 Item from the left menu.

6. Select the Filter  button.

7. 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 item.
- b. State field - The state in which the item is, such as Draft, To Do, In Progress, or Done.
- c. Initiator Company field - The company that has created the item.
- d. Title field - The title of the item.
- e. Last Modified field - The period of time in which the item was last updated.

8. Select Apply.

A list of items is displayed based on the filter results.

9. Select the Display Identifier of the item.

10. In the Comments and Attachments section, add a comment in the Comment Text field and name of the user in the Commented By field, or attach a file under Attachment.



Owners can mark comments as Internal Only to restrict visibility only within the Owner's organization.

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