



TRACELINK UNIVERSITY

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Resources

TraceLink University


Lists

A List is a multi-enterprise business object that allows to group multiple Items, Work Items, and sub-types. Owners can collaborate internally or externally with Partners to meet to track and complete a series of tasks (items, work items, and subtypes) in a list required to achieve a business objective.

Create a list

Create and configure a list to group multiple Items, Work Items, and sub-types.

Create a list

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 List from the left menu.
6. Select New.
7. In the General section fill in the Title and Description.
8. Select Save.

The item is created in the To Do state.

9. Optionally, to move the item to In Progress state, select the Move to

 button.




Tips

- Configure a prefix for list when setting up Process Orchestration for Empowered Teams. For more information about configuring prefixes, see [Specify prefixes for display identifiers](#).
- 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 a list

Add a new list association (Item, Work Item, or subtype) to the list or associate an existing Item, Work Item, or subtype.

Add a new list association

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 List from the left menu.
6. Select the Display Identifier of the item to edit.
7. Select the Edit  button.
8. Under List Associations, select the Add  button.
 - a. Select the Business Object Type.

b. Enter a Title for the business object.

c. (Optional) Enter a Due Date for the business object.

9. Select Apply.

10. Select Save.

The list is updated.

Add an existing business object to a list

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 List from the left menu.

6. Select the Display Identifier of the item to edit.

7. Select the Edit  button.

8. Under List Associations, select the Associate Existing Object  button.

a. Enter the Display Identifier of the object.

The Title, Due Date, and Assignee Company fields will be auto-populated.

9. Select Apply.

10. Select Save.

The list is updated.


Edit a business object in a list

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 List from the left menu.
6. Select the Display Identifier of the item to edit.
7. Select the Edit  button.
8. In the Comments and Attachments section, add a comment in the Comment Text field and attach a file under Attachment.
9. Select Apply.
10. Select Save.
The list is updated.

Delete a list

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





A list cannot be recovered once it is deleted.

Monitor lists

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

Search lists

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 list.
 - b. State field - The state in which the list is, such as To Do, In Progress, or Done.
 - c. Title field - The title of the list.
 - d. Last Modified field - The period of time in which the list was last updated.
8. Select Apply.

All lists are matching the filter criteria are displayed.

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