



TRACELINK UNIVERSITY

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Resources

TraceLink University

Work items

Work items facilitate collaboration and data exchange across multiple enterprises or partners. They are specifically built to support use cases where interaction between separate businesses, partners, or stakeholders is required. Work items provide shared visibility into key data and processes for all participating enterprises while ensuring security, access control, and traceability.


Work items can be used in situations where two companies collaborate on a shared task with strict deadlines, such as tracking the supply of life-saving medication for a hospital network. For example, the Owner (Pharmaceutical Formulator) is manufacturing a batch of life-saving medication that a Partner (Hospital Network) requires for an upcoming patient treatment program. The Owner is responsible for manufacturing, quality control, and packaging of the medication. Once ready, the medication needs to be shipped to the Partner, who requires the product to be on-site within 10 days to prepare for patient administration.


Both Owner and Partner must collaborate closely to ensure that the Owner meets production and packaging deadlines while the Partner prepares for immediate distribution to hospitals. Timely updates and coordination are vital to ensuring the medication arrives on time, meets quality standards, and is available for patient use without delay.

Create a work item

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

Create a work 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 Work Item from the left menu.
6. Select New.
7. In the General section fill in the following fields:
 - a. Title field - The title of the new work item.
 - b. Due Date field - The date by which the work item must be completed.
8. Select Save.

The work item is created in the Draft state.
9. To move the work item to To Do state, select the Move to  button.

Tips

- Configure a prefix for work 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 a work 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.

Create a work item by email

Owners and Partners who are on the TraceLink network but do not use the Web UI can create a work item by sending an email in a pre-defined format. To enable work item creation through email, Owners and Partners must follow the steps listed below:

1. Create an SMTP B2B connection in Extensible TraceLink Transfer, which generates a unique TraceLink email (e.g. apt_owner_6bba37c60eeb56@tracelink.com). For more information about adding an SMTP B2B connection, see the **Extensible TraceLink Transfer Help Center**.
2. Share the TraceLink-generated email address (e.g. apt_owner_6bba37c60eeb56@tracelink.com) with a TraceLink Service Representative to map the email address with Process Orchestration for Empowered Teams.



Draft a work item email

When creating a work item by sending an email, the subject line of the email will be used as the title of the work item and the body of the email will be added as a comment to the work item.

Modify a work item

Edit a work item and its sub-types, close a work item and its sub-types that are complete, or delete a work item and its sub-types that are no longer required.

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



The work item is updated.



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

Move a work item to done



When the work item's investigation is complete and an acceptable final response has been provided, the work 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 Work Item from the left menu.
6. Select the Display Identifier of the work item.
7. Select the Move to  button under the Done state.

The work item will be moved to the Done state.

Delete a work item

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





A work item cannot be recovered once it is deleted.

Monitor work items

Monitor work items and its sub-types at a high level to understand the state of all work items that you have access to.

Search work 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 Work 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 work item.
- b. State field - The state in which the work item is, such as Draft, To Do, In Progress, or Done.
- c. Due Date field - The date by which the work item must be completed.
- d. Initiator Company field - The company that has created the work item.
- e. Assignee Company field - The company that the work item is assigned to.
- f. Title field - The title of the work item.
- g. Last Modified field - The period of time in which the work item was last updated.

8. Select Apply.

A list of work 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 Work 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 work item.
- b. State field - The state in which the work item is, such as Draft, To Do, In Progress, or Done.
- c. Due Date field - The date by which the work item must be completed.
- d. Initiator Company field - The company that has created the work item.
- e. Assignee Company field - The company that the work item is assigned to.
- f. Title field - The title of the work item.
- g. Last Modified field - The period of time in which the work item was last updated.

8. Select Apply.

A list of work 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.

Related Content



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Forecasting APIs allow companies to exchange data about anticipated product demand and supply availability with upstream supply chain Partners without giving these Partners access to their serialization system of record.

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