



Configuring POET with OPUS Solution Environment



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Configuring POET with OPUS Solution Environment

Learning Objectives

At the end of this guide, you will be able to:

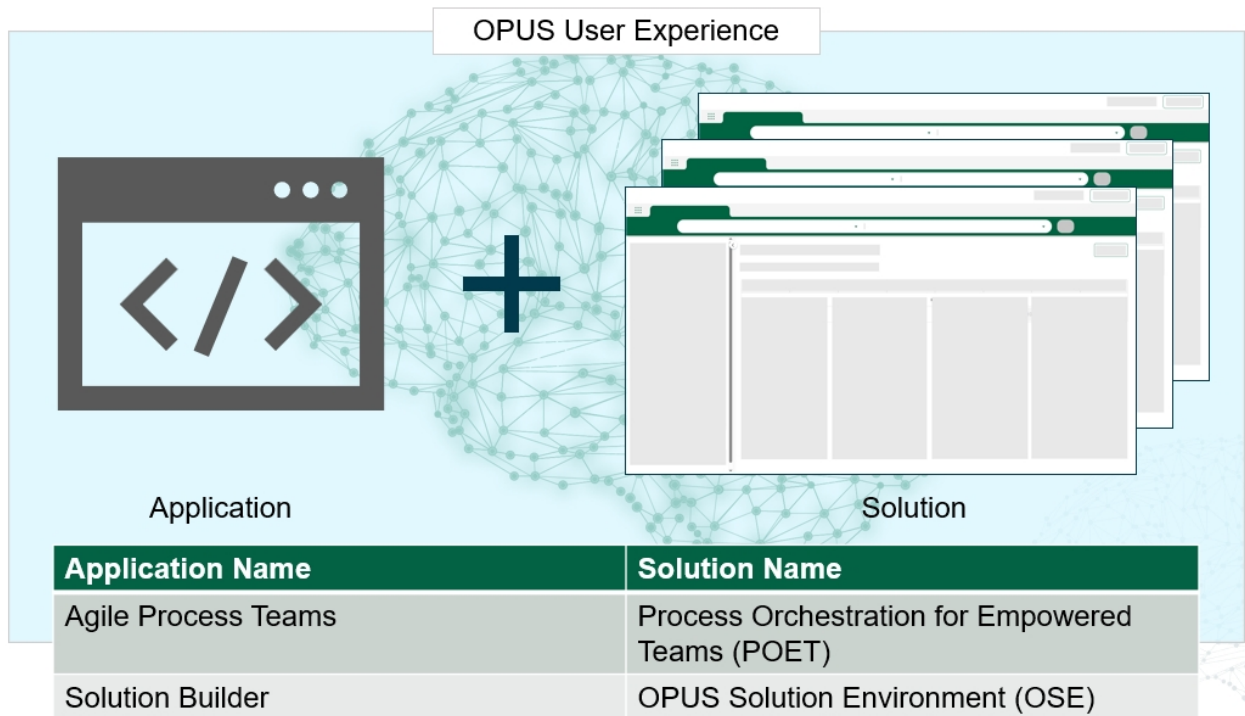
- Describe the OPUS Solution Environment (OSE) and its key components.
- Identify and differentiate OSE personas, outlining their roles and responsibilities within the environment.
- Explain the core principles of OPUS no-code configuration and how they apply to OSE.
- Navigate and manage OSE solutions within the OPUS Catalog.
- Configure POET solutions in OSE: define Business Object Types and set up pages, menus, roles, and workflows.
- Release a company-specific POET solution in OSE.
- Apply the configured solution to a POET network and verify the updates.

Introduction

Application vs Solution

The user experience within the OPUS (Orchestrating Platform for Universal Solutions) consists of two primary components: the Application and the Solution. The Application exposes headless APIs; the Solution supplies the UI. This separation lets you customize the UI for users or use cases while leaving application logic unchanged.

For instance, the Agile Process Teams (APT) is an application for the Process Orchestration for Empowered Teams (POET) solution. Similarly, the OPUS Solution Builder is the application for the OPUS Solution Environment (OSE).



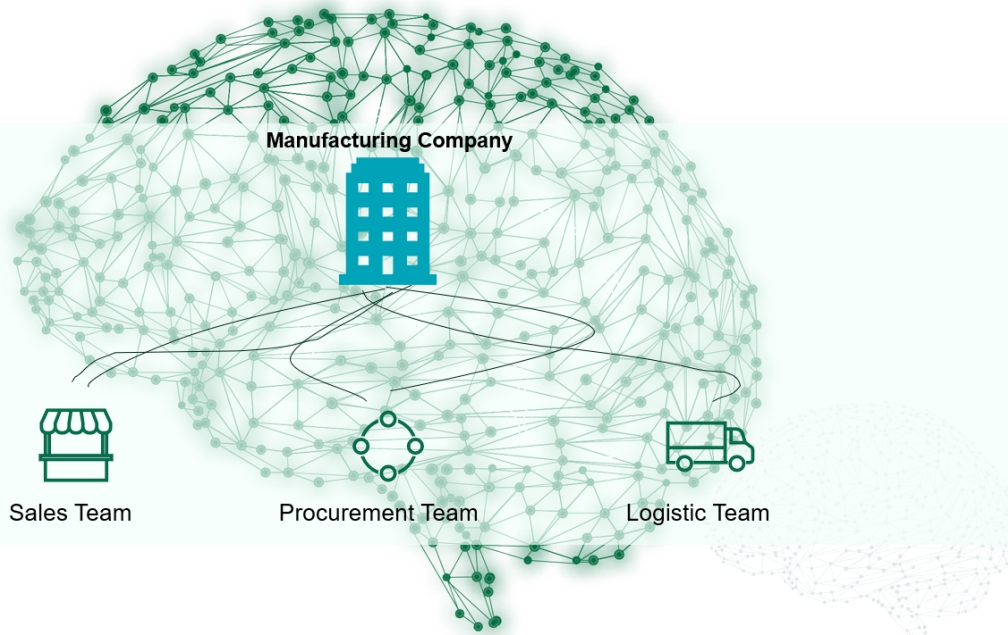
Why OPUS Solution Environment (OSE)?

Consider a real-world onboarding scenario. Medivonic’s current inventory management system lacks efficiency and transparency. To improve decision-making, collaboration with teams such as Sales and Procurement is required. Using POET’s Item feature, Medivonic aims to streamline this process.

However, the standard feature does not meet all requirements, necessitating customization.

The system will be configured to:

- Update field names on the Search Item page to match company terminology.
- Add a new access control role.
- Introduce substate in the workflow.



OSE Architecture

Metadata Driven Approach

OSE uses three metadata layers Business Object, User Interface, and Solution to push configuration as low in the stack as possible.

Business Object Metadata:

This is the foundational layer where object types, fields, and operations are defined.

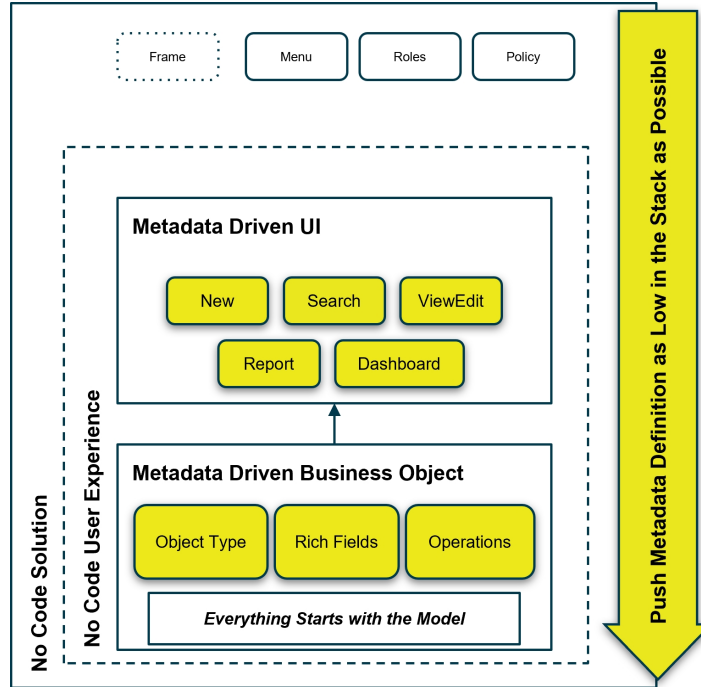
These elements form the core characteristics and behaviors of an application.

User Interface Metadata:

In this layer, standard, pre-coded page types are configured for each business object. These configurations determine which fields and operations from the business object layer are exposed to users.

Solution Metadata:

The final layer ties everything together and fine-tunes specific user experiences with defined authorizations, using elements such as menus, roles, and permissions.



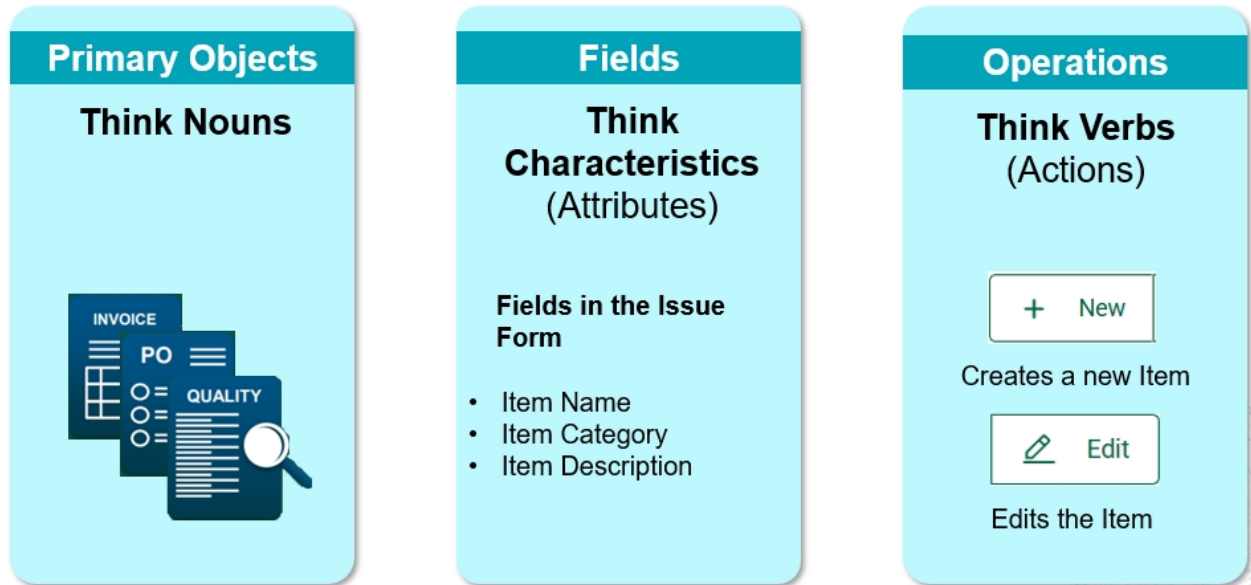
Business Transaction Objects (BTOs)

The Business Object layer is where you define and configure the following components:

Business Objects: These represent the items users manage within the system. They are familiar concepts from the business domain, such as Item, Work Item, allowing users to intuitively understand how to interact with them.

Fields: These are the specific characteristics or attributes of a business object. Examples include Name, Item Category, and Item Description.

Operations: These are the actions a user can perform on a business object. They are typically represented by on-screen buttons, such as New, Edit, and Submit.

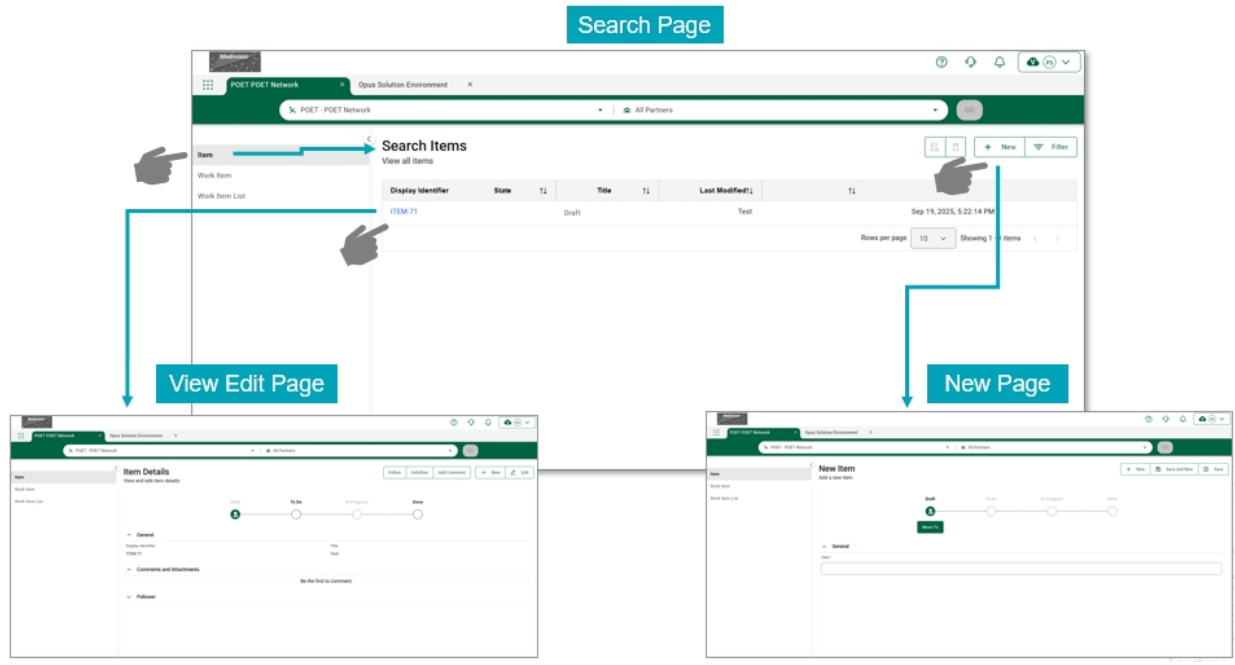


User Interface Metadata Layer

In the User Interface Metadata layer, business objects (for example, Item) appears in the left-side menu. Selecting one of these objects will launch a Search page, Dashboard, or Report page.

For the Search page, you can choose which fields from the business object will appear in the search results table by dragging and dropping them. From the search results, clicking a link (like Display Identifier) will take the user to a View/Edit page. Clicking a New button will take the user to a New page.

On the View/Edit and New pages, you can also drag and drop the fields you want users to be able to interact with. You can create multiple View/Edit or New pages to support different user roles, such as internal company users versus external partners.



OSE Personas and OPUS Solution Catalog

OSE Personas

OPUS Developer: Develops Multienterprise Applications and Standard Solutions for TraceLink customers. These individuals manage the Standard Solutions section of the catalogs.

Solution Designer (Solution Partner): Configures solutions for industry needs. These solutions can be published in the Marketplace Solutions section of the catalog.

Solution Designer (Customer): Configures solutions for their own company and their trade partners' unique requirements. These solutions are maintained in the Company Solutions section of the catalog.

End Users: Use a standard solution or a custom company solution applied to a specific process network.



OPUS Developer

...My goal is to develop Multienterprise Applications and Standard solutions for TraceLink customers.



Solution Designer (Solution Partner)

...My goal is to configure solutions for industry needs that I can publish as a Marketplace Solutions.



Solution Designer (Customer)

...My goal is to configure my company solutions to my company's and trade partner's unique requirements.



User

...Use TraceLink's Standard Solutions OR Use a Company Solution specifically tailored to our business requirements.

OPUS Solutions Catalog

The OPUS Solution Catalog organizes OPUS solutions into three categories: Standard Solutions, Marketplace Solutions, and Company Solutions.

Standard Solutions:

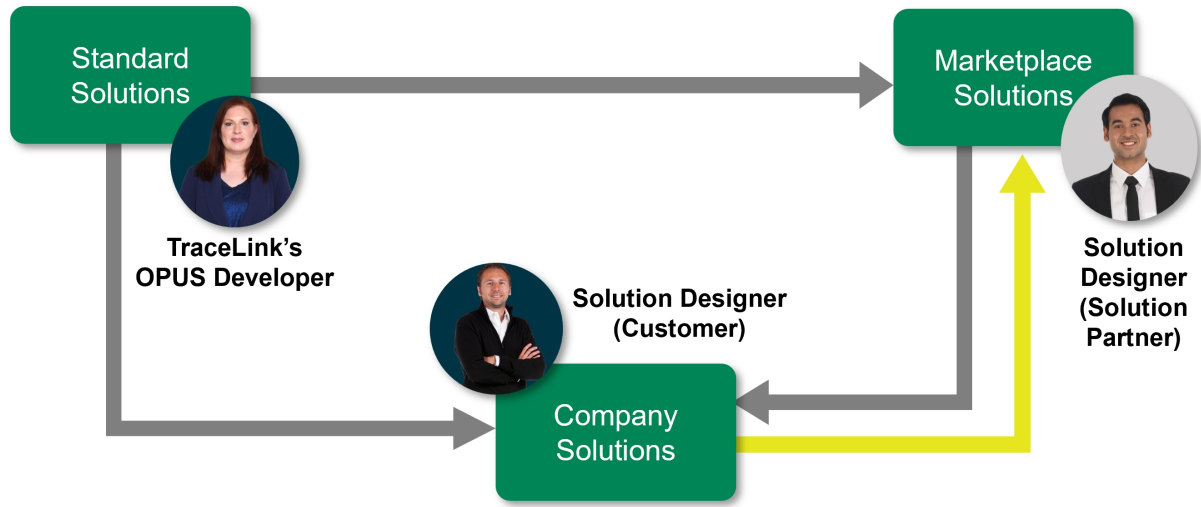
These solutions are developed by TraceLink's OPUS developers and function right out of the box. They are pre-installed when you license an application like POET and are designed to solve common use cases.

Marketplace Solutions:

These solutions are developed by TraceLink and its solution partners. Partners create and publish these solutions to address the specific needs of various customer segments. A single partner can publish multiple solutions for an application, such as ORD reports or POET.

Company Solutions:

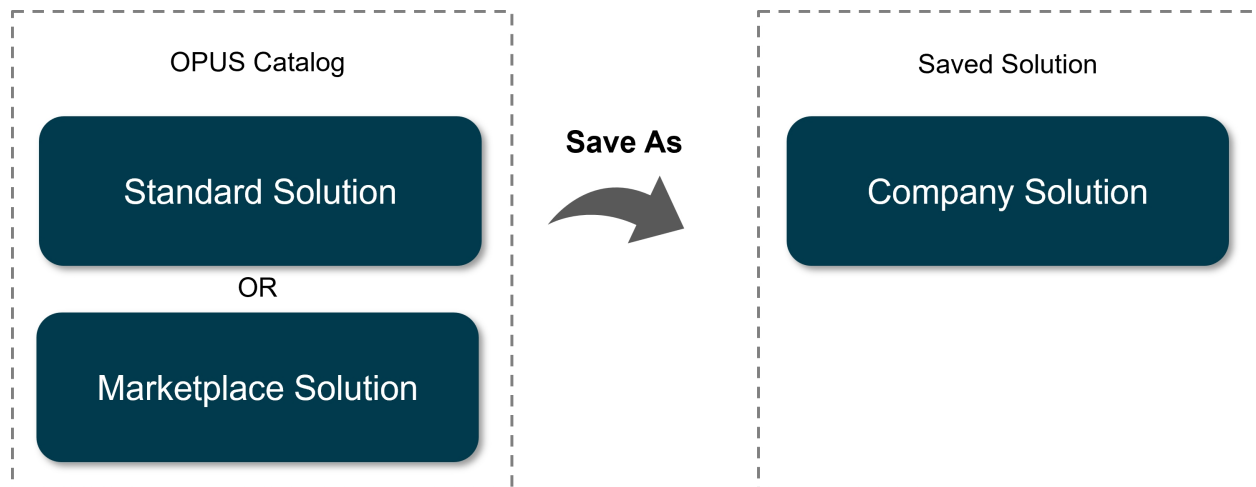
If standard or marketplace solutions do not meet your specific requirements, you can create your own company solutions. You can do this by saving a standard or marketplace solution and then customizing it. Once configured, you can begin using it immediately. TraceLink and its solution partners can also assist in configuring these solutions to ensure they perfectly match your unique needs. A Company Solution can be promoted to a Marketplace Solution after partner review.



Preparing to Configure a Solution

To begin configuring a solution, you must first save a standard or marketplace solution as a company solution.

Once saved, the solution will be accessible in the Available > Company Solution section. This step is essential because you cannot directly edit standard solutions. After the solution appears in the available company solutions, you can begin editing and configuring it to meet your specific needs.





Save a Standard Solution as a Company Solution

1. Log in to *opus.tracelink.com*.
2. Select **Opus Solution Environment** from the **Main Menu** ☰.
3. In the side menu, select **Catalog > Standard Solutions**.
4. In the Solution Name column, select the link for the latest POET solution.
5. Click the **Save As** button from the Operations toolbar.
6. In the Save As push panel, complete the following:
 - Enter the Solution Name
 - Enter Solution Description
 - Click **Apply**.
7. In the side menu and select **Available > Company Solutions** to view or edit the new Company Solution.

Preparing to Configure a Solution

In the Opus Solution Environment, Business Object Types are the core data entities that model all real-world processes and transactions. They define how information is structured, exchanged, and governed across the network.

Each object type has:

- A schema (data model).
- A workflow (state transitions).
- Business logic (rules & validation).

They can be customized to include unique attributes per organization.

They also support auditing for traceability and can participate in a searchability for decentralized ownership. Finally, they maintain relationships with other object types, for

example, customers linked to their orders creating a full digital thread across the supply chain.



Configuring Pages

With OSE's intuitive drag-and-drop interface, you can effortlessly configure various field types.

Simple fields: These fields store single values, such as Item Name, etc.

Groups: A Group organizes related fields together. For example, an Address group would contain multiple simple fields like Country, City, and Postal Code.

Collection: A Collection is a data element that can store multiple values within a single object instance. Each collection within an object is displayed in its own dedicated table.

Panel: A Panel in OSE is a container or layout area used to organize fields, collections, and UI elements related to a business object. Panels can be considered as sections on a web page and are fully configurable to include tables, form fields, and collections.

There are different types of panels. The most common is the Main Page Panel, which is the default view when a page is opened. Another type is the Push Panel, which slides in from the right to display or allow editing of additional details without the user losing sight of the main page.




For example, on an Item View/Edit page, the main panel typically contains all the sections, fields, and collections. In contrast, a push panel might contain filters or options to support a specific operation.

As a best practice, the main panel should be used for key summary data, while push panels are ideal for extended details, which helps to optimize the user experience.



Configure a Search Page

Access and Edit the Search Page:


1. Select **OPUS Solution Environment** from the **Main Menu** 
2. In the side menu, select **Solution > Search Pages**.
3. Click  Filter.
4. Use the drop-down menus located under the **Filters** pushpanel to locate the desired **Page Name**.
5. Click **Apply**.
6. In the **Page Name** column, select the hyperlink for your desired Page Name.
7. In the top toolbar, click the  icon. The toolbar will display additional configuration options.

Rename the Page Title and Hide the Subtitle:



1. Select the **Page Title** field to activate context-sensitive toolbar options.
2. Click **Configure UI Properties** in the toolbar.
3. In the configuration panel, update the subtitle from Search Items to **Search Medivonic Item**.
4. Click Apply.
5. Select the **Page Subtitle field** and then click the **Hide** icon to remove it from view.

Configure the Search Table:

1. Select the Search Table area (outlined by a dotted box).
2. Click the **Drag and Drop Field** button in the toolbar.

3. Add the following columns by dragging and dropping them into the table:
 - Created By User
 - Last Updated By User
4. Position the new columns between the existing Title and Last Modified columns.
5. To rename the existing Title column to Item Type, select the Title field and click **Configure UI Properties**.
6. Enter the new name and click Apply.
7. Click  from the Operations toolbar.

Configure the Filter Panel:

1. Click  to enter the configuration mode.
2. Select the **Panels** button in the toolbar.
3. In the **Design Panels** panel, select **Filters**, and then click **Apply**.
4. Select the Title field and click **Configure UI Properties**.
5. Update the panel title from Title to Item Type, then click **Apply**.
6. Reorder the filter fields in the following order:
 - Item Type
 - Current State
 - Last Updated Date/Time
7. Select the filter fields container (dotted box), then click **Drag and Drop Field**.
8. Add the Created By User field as a filter field.
9. Rename the Last Modified Date/Time filter field to Last Modified.
10. Click  to finalize all changes.

Configuring Menus





The Side Menu in OPUS's user experience organizes content into submenus and menu items. Submenus are used to group business objects by orchestration or use case. Menu items are secured by roles, permissions, and policies to ensure users only have access to relevant information and operations.

With OSE, you can configure unique side menus for different user types:


- You can create distinct menus for different internal users based on their roles.
- You can design different menu experiences for various partners within the same process network.
- Even within the same partner organization, you can create different side menus for different users depending on their specific needs.



Create a New Menu Instance

1. In the side menu, select **Solution > Menus** to display the **Search Menus** page.
2. Click  from the Operations toolbar.
3. Complete the following fields for the new **Menu**:
 - Menu Name
 - Menu Display Name
 - Solution
4. Click  from the Operations toolbar.
5. Click  from the Operations toolbar.
6. In the Submenus and Menu Items section, select the **New Submenu or Menu Item**  icon.
7. In the New Submenu or Menu Item push panel, complete the following:

- Submenu or Menu Item
- Name
- Display Name
- Target Page Type
- Page Object
- Click **Apply**.

8. Click  from the Operations toolbar.

Configuring Roles

Users' access to data and operations in a solution is governed by a combination of permissions, roles, and policies. These elements are defined separately but work together to control access levels, protect data, and meet security standards.

Permissions

Permissions define what a user can and cannot do within OPUS. For example, in POET, permissions might allow a user to view, edit, or create purchase orders. TraceLink products come with a set of predefined permissions that solution designers cannot modify.

Roles

Roles group one or more permissions to define a specific level of access that can be assigned to a user. For instance, a role could group the permissions to create, view, and edit items. This role can then be assigned to multiple users simultaneously. You can create new roles or modify existing ones by adding or removing permissions.






Policies

Policies provide the logic that governs the permissions associated with roles. They ensure that a user is authorized to perform specific actions based on their assigned role.

Note: Modifying policies is an advanced topic that should only be attempted after consulting with your company's security team and a TraceLink Services representative.



Create a New Role Instance

1. In the side menu, select **Solution** > **Roles** to display the **Search Roles** page.
2. Click  from the Operations toolbar.
3. Complete the following fields for the new **Role**:
 - Role Name
 - Role Display Name
 - Solution
 - Description (Optional)
4. Click  from the Operations toolbar.
5. Click  from the Operations toolbar.
6. On the Role Details page, scroll down to the Menu Permissions section.
7. In the Menu Permissions section, expand the **MPC Standard Menu** collection table.
8. Select the desired Menu Item row and then click the **Edit**  icon from the Operations toolbar.
9. In the Edit Menu Item Permissions push panel, complete the following:
 - Toggle the **Grant Permissions** button to set the field value to **Permitted**.
 - Click **Apply**.
10. Click  from the Operations toolbar.

Configuring Workflows

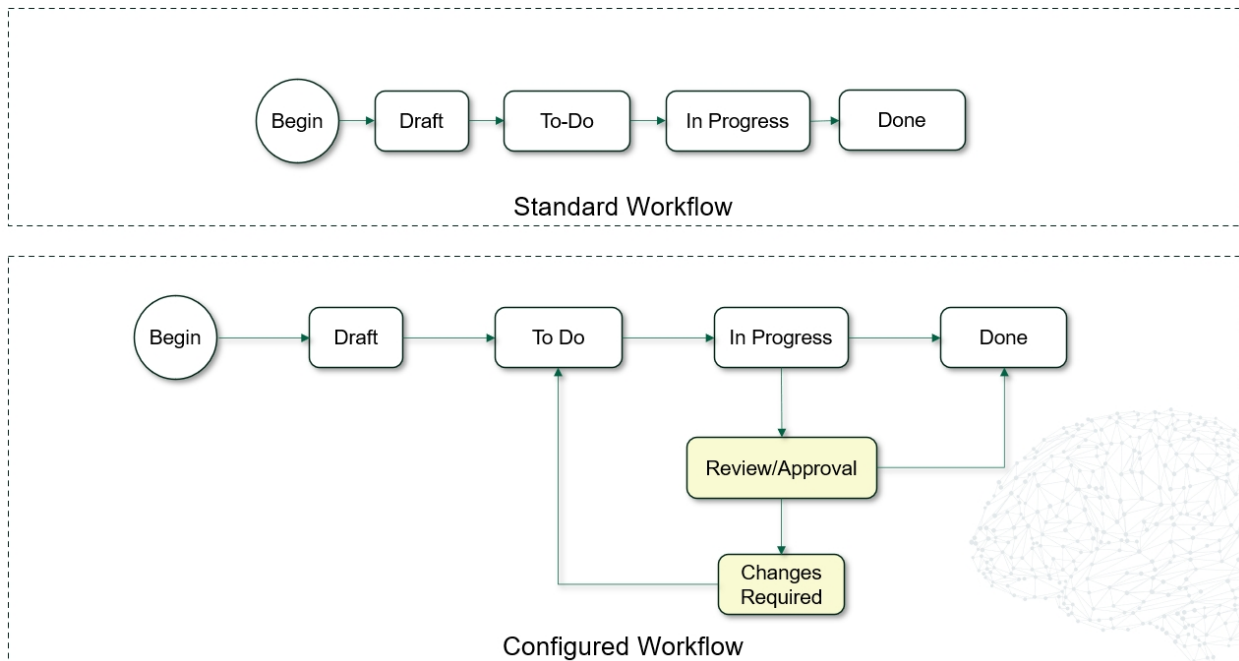
Workflows are powerful mechanisms that enhances business process management by providing structure, automation, and integration. Every object, such as a Item, comes with a standard workflow. You can view its current state on the New and View/Edit pages and move through states on the Edit page.

You cannot directly modify standard workflows. However, you can extend a standard workflow to meet specific business requirements. When extended, it becomes a configured or company workflow.

Configuring Workflows:



You can add substates that are associated with a base state. You can add transitions between substates and base states. You can also add conditions and post-transition actions to those transitions.

Before configuring your workflow in the OPUS Solution Environment (OSE), it's crucial to first identify your specific business requirements and define the desired workflow states, transitions, conditions, and actions. This definition often occurs during the modeling stage and may require collaboration with an OPUS Developer. Diagramming the workflow early in the process helps define it clearly. Modeling the objects correctly before configuration makes the workflow setup easier.





Workflow - Add a New Sub State

1. In the side menu, select **Solution > Workflows** to display the **Search Workflows** page.

2. In the **Business Object Workflow** column, select the link for the required solution.
3. Click  from the Operations toolbar.
4. In the **Workflow States and Transitions** table, select the desired **Base State**.
5. Click the **Add Sub State +** icon.
6. In the Add Sub State push panel, complete the following:
 - Select the **Base State** from the drop-down list.
 - Enter the **Sub State** and **State Display Name**.
 - Toggle the **Start State** button to **Enable** or **Disable**, as necessary.
 - Click **Apply**.
7. Notice the newly added Sub State in the **Workflow States and Transitions** table.
8. Click  from the Operations toolbar.





Workflow - Edit a Sub State

1. In the side menu, select **Solution > Workflows** to display the **Search Workflows** page.
2. In the Search Workflows table, select the link for the desired **Business Object Workflow**.
3. Click  from the Operations toolbar.
4. In the **Workflow States and Transitions** table, select the desired **Sub State**.
5. Click the **Edit Sub State**  icon.
6. In the Edit Sub State push panel, edit the required fields and then click **Apply**.
7. Notice the edited Sub State in the **Workflow States and Transitions** table.
8. Click **Save** to save the changes to the Workflow.





Workflow - Edit a Sub State of the Base Start State

1. In the side menu, select **Solution > Workflows** to display the **Search Workflows** page.
2. In the Search Workflows table, select the link for the desired **Business Object Workflow**.
3. Click  from the Operations toolbar.
4. In the **Workflow States and Transitions** table, select the desired **Sub State**.
5. Click the **Edit Sub State**  icon.
6. In the Edit Sub State push panel, toggle the **Start State** button to **Yes** and then click **Apply**.
7. Notice the edited Sub State in the **Workflow States and Transitions** table.
8. Click **Save** to save the changes to the Workflow.





Workflow - Add a Transition

1. In the side menu, select **Solution > Workflows** to display the **Search Workflows** page.
2. In the **Business Object Workflow** column, select the link for the desired Business Object Workflow.
3. Click  from the Operations toolbar.
4. In the **Workflow States and Transitions** table, select the desired **Sub State**.
5. Click the **Add New Transition**  icon.
6. In the New Transition to display the **New Transition** push panel.
7. Select the desired transition from the **To State** drop-down list and click **Apply**.

8. Notice the new **Sub State Transition** in the **Workflow States and Transitions** table.
9. Click **Save** to save the changes to the Workflow.



Workflow - Remove a Transition

1. In the side menu, select **Solution > Workflows** to display the **Search Workflows** page.
2. In the **Business Object Workflow** column, select the link for the desired Business Object Workflow.
3. Click  from the Operations toolbar.
4. In the **Workflow States and Transitions** table, select the desired **Sub State**.
5. Select the desired **Transition To State**, then click the **Remove Transition**  icon to open the **Remove Transition** push panel.
6. In the Remove Transition push panel, click **Apply**.
7. Click **Save** to save the changes to the Workflow.


Releasing a Company Solution

Once configuration is finalized, the solution can be transitioned from the Edit state to the Test state to initiate the release process. This transition triggers the Pack process, an automated background operation that bundles all relevant metadata, configurations, and assets into a deployable package. This ensures the solution is properly versioned, validated, and ready for controlled distribution.

Upon successful completion of the Pack process, the solution becomes available in the Company Solutions catalog, where it can be deployed by authorized users or environments.




Move the Company Solution to the Test State

1. In the side menu, select **Available** > **Company Solutions**.
2. In the **Solution Name** column, select the link for the desired Business Object Workflow.
3. Click  from the Operations toolbar.
4. Click the **Move To** button to transition the Solution from the **Edit** state to the **Test** state.
5. Click **Save** in the Operations toolbar.

Note: Moving the Solution from the **Edit** state to the **Test** state triggers the **Pack** process in the background.



Release the Company Solution

6. In the side menu, select **Available** > **Company Solutions**.
7. From the Solution Name column, select the link for the desired solution that is in the **Test** state.
8. Click  from the Operations toolbar.
9. Click the **Move To** button to transition the Solution from the **Edit** state to the **Released** state.
10. Click **Save** in the Operations toolbar.

Note: Moving the Solution from the Edit state to the Test state triggers the Pack process in the background. When the Pack process completes and the solution is released, it appears on the Company Solutions search page under the Catalog side menu.


11. In the side menu, select **Catalog** > **Company Solutions** to display the **Search Solutions** page.

Activating the Company Solution

As a System Administrator, you can use the OPUS Administration solution to activate a solution for a specific network. To do this, you first edit the network, select the Custom Solution option, and save the changes.



Activate a Company Solution

1. Select **Administration** from the Main Menu .
2. In the side menu, select **Network and Apps > Network and Apps**.
3. Click **Filter**.
4. In the Filters push panel, select your network from the Application drop-down and then click **Apply**.
5. On the Search Networks and Apps screen, select the Network hyperlink.
6. Click **Edit**.
7. In the Solution section, set the Standard Solution switch to **No**.
8. Select the company solution from the Company Solution drop-down.
9. Click **Save**.

A company solution is applied to the network.