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NETWORK FOR GREATER GOOD

OPUS Link Lab Solution Development for POET



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OPUS Link Lab Solution Development for Process Orchestration for Empowered Teams (POET)

Learning Objectives

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

- Describe Process Orchestration for Empowered Teams (POET) in OPUS Solution Environment (OSE).
- Describe the POET base object types and their subtypes.
- Explain the expansion object model and solution components within POET.
- Describe the overall POET design flow.
- Apply learned concepts through a hands-on workshop exercise.

Overview

This guide introduces the OPUS Solution Environment for POET. POET digitalizes cross-functional and partner-driven processes, replacing email threads and spreadsheets with a structured, centralized system. By connecting people, tasks, and data in one controlled environment, organizations gain greater visibility, reduce delays, and eliminate manual tracking. Beyond improving efficiency and collaboration today, POET also establishes a strong digital foundation that enables the future use of AI-driven agents to further automate and optimize these processes.

You build solutions in POET using four base objects: Work Item, Item, and List. These objects form the foundation of the workflow you are trying to build out. You use the objects to then extend them into business objects such as Incident Management, Checklists, Quality Reviews, Drug Recall, etc. Each process uses the same base structure, which keeps your system consistent while allowing flexibility for different needs.

To build a solution, you define the data model, configure workflows, assign roles and permissions, and create reports and dashboards. You also design user pages that support search, create, and edit actions. This step-by-step approach helps you turn a defined process into a working solution.

Introduction to OPUS Solution Environment for POET

Process Orchestration for Empowered Teams (POET)

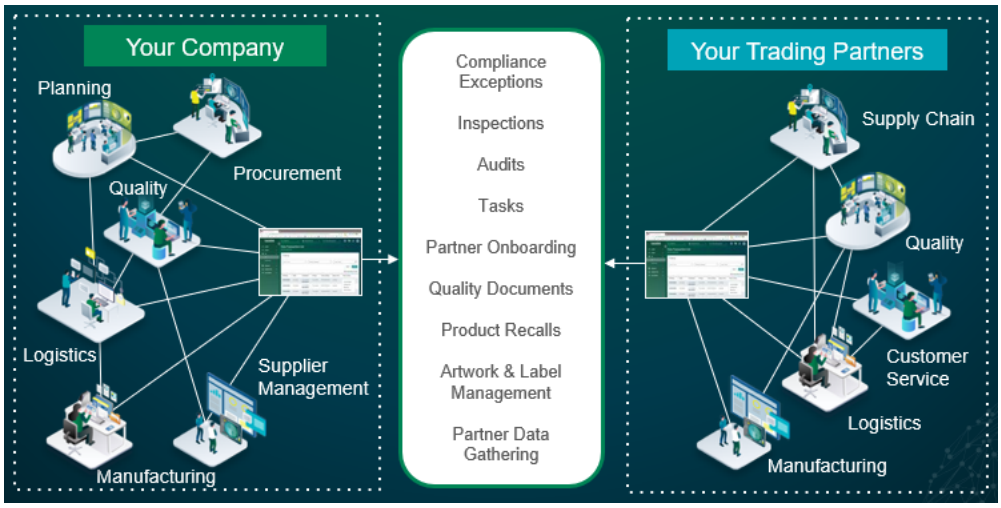
POET helps you work effectively with both internal teams and external partners. In most organizations, daily work depends on clear coordination across planning, procurement, quality, manufacturing, logistics, supplier management, and customer service. When information is not shared in a structured way, delays increase and results become inconsistent.

Companies may experience missed delivery dates because order updates and production status do not align. Organizations may rely on emails or spreadsheets to track tasks, changes, and issues. This manual approach slows cycle time, creates confusion, and limits the ability to measure performance or identify trends.

POET improves how you collaborate by bringing people and processes into one connected system. Everyone works in shared workflows instead of separate tools. It allows you to manage compliance events, inspections, audits, onboarding, recalls, artwork processes, and partner data in a single digital environment. Everybody follows the same process and sees the same information.

POET supports this way of working. It allows you to share data securely across company boundaries. You collaborate through shared tasks, issue tracking, change requests, and document reviews. This structure helps you understand roles, responsibilities, and progress at any time. With this approach, you gain clear visibility into partner activities, improving on time in full performance, fill rates, and cost control. It allows you to spend less time reacting to problems and more time managing work in a consistent and predictable way.

This foundation helps you understand how OSE supports POET in a practical and usable way.



Base Objects

POET uses a flexible and scalable object model to support cross-enterprise processes. At the center of OPUS, you work with three base objects: Work Item, Item, and List.

Item helps you manage collaborative processes within a single enterprise. WorkItem is used when work needs to be coordinated across multiple companies or partner networks, and it includes an expected due date. Both objects can be customized to fit different business needs. List is used to organize related records. It groups work items or other objects so you can manage them in a clear and structured way.

These three objects form the foundation of the solution. They give you structure, consistency, and reusability across use cases. Instead of creating a new system for each process, you configure and extend these core objects to support different operational needs. This approach improves efficiency and allows organizations to scale across their enterprise network.

POET - Expansion Object Model

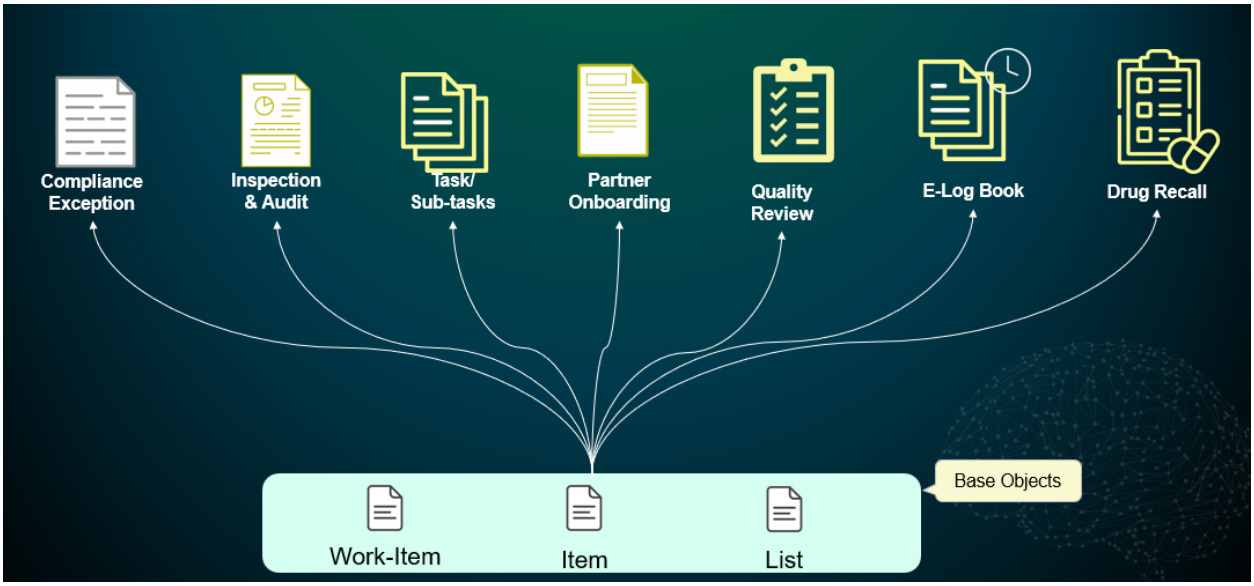
Start with the base objects and configure subtypes to represent specific business processes. These include Compliance Exception, Inspection and Audit, Task and Subtasks, Partner Onboarding, Quality Review, E Log Book, Drug Recall, etc.

Each process uses the same core object structure. For example, a Compliance Exception uses work items to manage tasks, and lists to organize structured data. A Drug Recall

uses the same core objects but applies them to a different business need. This object-based approach keeps the structure consistent while allowing you to adapt it to different scenarios.

This model provides two key benefits. First, you deploy solutions faster because you configure existing objects instead of building new systems from the beginning. Second, you scale more easily because every new use case builds on the same foundation.

This model is fundamental to understanding OPUS capabilities. Every capability used builds on this structured and flexible object framework.



Solution Components

After selecting the correct business object from the base model, you build the full solution using the main components.

First, define the data model. Decide which fields the process requires, what information users must enter, how it should be organized, and where it appears on the page. Clear field setup helps users enter accurate data and supports reliable reporting.

Next, configure the workflow. Define how the record moves from one state to another. A clear workflow shows users what to do next and keeps the process moving in a controlled way.

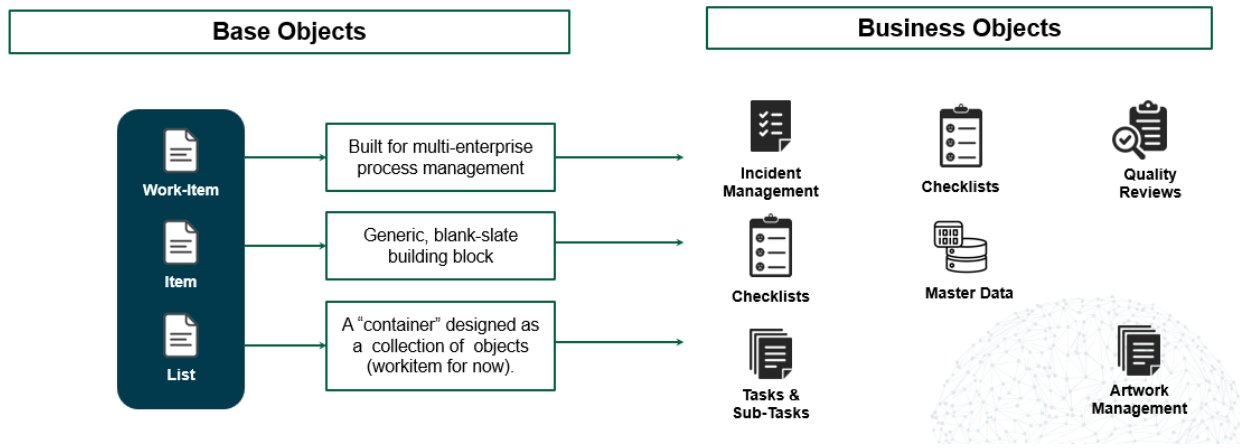
Then, define stakeholders and roles. Identify who uses the object and what each person can do. Some users create records, while others review or approve them. Clear role configuration protects data and supports effective collaboration between internal teams and external partners.

After that, configure reports and dashboards, using captured data to track key metrics and monitor process status. Teams review open items, measure performance, and identify trends over time.

Finally, design partner specific dashboards. Adjust visibility based on each partner's responsibilities. This setup gives partners access to the information they need while maintaining control.

Together, these components turn a basic object into a complete business solution. It follows a defined process, track results, and expand the solution as your needs grow.

POET Solution Design



This view shows how the object model and solution components work together in one design. It explains how you turn basic system objects into real business processes in OPUS.

Start with a small set of base objects then extend these base objects into subtypes that support specific business needs. These subtypes become the business objects that teams use every day.

On the left, you see the three base objects. On the right, you see examples of business objects created from them. You configure these objects to support processes such as Incident Management, Checklists, Quality Reviews, Tasks and Subtasks, Master Data, and Artwork Management.

Each business object connects back to a base object. It follows the same structure and rules. This connection keeps the system consistent and easier to manage. At the same time, you can adjust each object to match different process requirements.

This approach keeps the design simple and flexible. Using the same foundation for many processes. Users do not build a new system each time. You configure what already exists, which saves time and makes the solution easier to maintain.

Configurable Solution Components

Now translate process design into a working business object in POET. When you define a process, it's implemented as a structured object with clearly configured components.

Each business object includes key elements that shape the user experience and control execution.

Start with menus. Menus define how users access the object in the application. They provide clear navigation and help the right users find the right functionality quickly.

Next, define roles. Roles control who can create, view, edit, approve, or manage records. Clear role setup protects data, supports governance, and ensures accountability across internal teams and external partners.

Within the object, configure pages that support user interaction. These usually include Search, New, and View or Edit pages.

The Search page helps users find records based on defined criteria. Strong search capability improves efficiency and increases visibility across active and past records.

The New or Create page allows users to start a process instance. Here, you capture structured data that follows the defined data model.

The View or Edit page supports collaboration and ongoing work. Users update information, attach documents, track progress, and complete assigned actions within a controlled structure.

Two core elements power these pages. Fields define what data you capture and how you structure it. Workflows define how the record moves from one stage to another.

Together, menus, roles, pages, fields, and workflows turn a defined process into a fully operational business object. This configuration ensures that POET supports consistent, controlled, and scalable process execution across your enterprise network.

Solution Design Flow

Now, review the Solution Design Flow. Start with the business object. At this stage, you define the overall process. Clarify what the process manages and what problem it solves. For example, you may define an Incident Management process that controls how teams capture, track, and resolve supply chain incidents.

Next, define the data model. Identify the fields required to support the solution. Decide what information users must enter, such as Incident ID, title, due date, severity, or supplier name. A clear data model ensures structured data capture and supports reporting and analytics.

Then design the pages. Configure the user interface by placing fields on pages. You organize the layout so users can easily enter and review information. A clear page design improves adoption and execution.

After that, define the workflow. Set how the record moves from one state to another, such as from Draft to To Do, then In Progress to Done. You configure approvals, task assignments, and decision points to maintain control and accountability.

Next, add roles and permissions. Define which roles use the solution and what access each role has. Some users may have view only access, while others can create or edit records. Clear role setup protects data and supports governance.

Finally, configure reports and dashboards. Define the metrics that matter, such as incidents by supplier, resolution time, or open versus closed cases. Reports turn structured data into insights that support daily operations and business decisions.

This end-to-end flow ensures that every solution you build in POET remains structured, measurable, and aligned with business goals.

Lab 1: Access the POET solutions within OPUS

In this lab, you will access the Process Orchestration for Empowered Teams (POET) solution within the OPUS Platform.

Log In and Navigate to the OPUS Solution Environment

1. Log in to *opus.tracelink.com.*
2. Select **OPUS Solution Environment** from the **Main Menu** .

Access the Company Solutions and Open Solution Details Page

1. In the side menu, select **Available** > **Company Solutions**.
2. Click **Filter**.
3. In the Filters push panel, select **Process Orchestration for Empowered Teams** from the **Application Name** drop-down.
4. Click **Apply**.
5. Select the **POET Demo** solution hyperlink to open **Solution Details** Page.

Lab 2: Configure a Page within POET

In this lab, you will configure a page within POET using the available configuration tools.

Using the Drag and Drop Feature

1. On the **Solution Details** page, select **New Pages**.
2. To open the Page Details view, select **newWorkItem** hyperlink.
3. Click **Edit** to enter edit mode.
4. Select the General table (inner dotted box), then select the **Drag and Drop Field**  from the toolbar.

5. Drag and drop the following fields in the table:
    - Creation Time Stamp
    - Last Modified By User
    - Assignee Company
    - Assignee User
    - comments
6. Click **Save**.

Using the Configure UI Properties Feature

Follow these steps to rename a page in OSE.

1. Stay on the **New Work Item** page in **Edit** mode.
2. Select the **Page Title** field and then click the **Configure UI Properties**  from the toolbar.
3. In the **Edit Properties** push panel, find the field labeled **Enter the text***.
4. Update name from **New Work Item** to **New Medivonic Page Details**.
5. Click **Apply**.
6. Click **Save**.

Lab 3: Viewing Your Edited Pages

In this lab, you will view your edited pages.

Viewing Your Edited Pages

1. Select **My Networks** from the **Main Menu** .
2. Select **POET Network** from the Network drop-down.

3. Click **GO**.
4. In the side menu, select **Work Item**.
5. You will be directed to the default landing page, which is the **Search Page**.
6. To create a new record, click the **New** button.
7. All the edits you have made, such as drag-and-drop customizations and renamed title field, will be visible on this page.

NOTE: You cannot save a new record for now because the process network is not configured in this example. In a real environment, once the process network is properly configured, you will be able to save and manage records normally.