NETWORK FOR GREATER GOOD

OSE Troubleshooting



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OPUS Solution Environment (OSE) Troubleshooting

Learning Objectives

- Perform key checks before troubleshooting an OSE Solution.
- Troubleshoot common issues across OSE Solution elements.
- Identify whether an issue is related to configuration, permission, versioning, or testing setup.
- Use a structured approach to investigate and resolve solution behavior issues.
- Validate configuration changes using the correct user roles and solution version.
- Apply testing and release checklists to confirm solution readiness.
- Recognize when an issue should be escalated to Support.

Overview

During OSE configuration and testing, a Solution Designer may find that the configured solution does not behave as expected. OSE troubleshooting helps identify which configuration area is responsible for the issue, such as solution preparation, pages, workflows, menus, roles, testing or validation.

Before making configuration changes, first confirm the solution's context: life-cycle state, affected user role, permissions, network activation, whether changes were saved and validated, and whether the session has refreshed.

A structured approach helps narrow the issue quickly. Start by asking: "Which configuration area controls the behavior that is not working?"

To get started

Before starting the OSE Troubleshooting course, learners should be familiar with core OSE configuration concepts and have prior experience working as a Solution Designer.

Confirm the following before troubleshooting:

- The user has the required OPUS Solution Designer role, if configuration access is needed.
- The user has access to the required applications.
- The solution is assigned or activated on the correct network for testing.
- The solution is in the expected life-cycle state: Edit, Test, or Released.
- Configuration changes were saved and validated before testing.
- The current session has refreshed to load the latest configuration.
- Required fields are populated before testing workflow transitions.

Troubleshooting OSE Configuration Areas

OSE troubleshooting begins by identifying where the issue is occurring within the solution configuration. Most issues can be traced to one of the main configuration areas: solution preparation, pages, workflows, menus, roles, or testing/validation.

Once the affected area is identified, the troubleshooting process becomes more focused. For example, issues related to what appears on a page should be investigated in page configuration, while issues related to access or visibility should be reviewed through roles and permissions.

Each area controls a different part of the solution's behavior:

- **Solution Preparation** controls whether the solution can be downloaded, saved, unpacked, edited, or versioned.
- **Pages** control page elements, field visibility, buttons, tables, and page-level navigation behavior.
- **Workflows** control state transitions and action-driven movement of records.
- **Menus** control how users access pages and whether menu items navigate to the expected destination.
- **Roles** control visibility and access to configured elements.
- **Testing or Validation** confirms that saved configuration changes are available in the active testing session.

Solution Preparation Troubleshooting

Solution preparation troubleshooting focuses on issues that occur when a Solution Designer is downloading, saving, preparing, editing, or versioning an OSE solution.

These issues may commonly involve:

- Solution version conflicts
- Package unpacking failures
- Invalid solution package details
- Incorrect solution life-cycle state

Solution life-cycle state is especially important because configuration behavior changes depending on whether the solution is in **Edit**, **Test**, or **Released** state.

Solution Preparation Scenario 1: A Released Solution cannot be Downloaded

This scenario occurs when an OPUS Solution Designer attempts to download a released solution, but the requested version is older than a version that already exists.

OSE prevents an older released version from being downloaded over a higher released version. This protects the solution from being overwritten by an earlier version and helps maintain version integrity.

To troubleshoot this issue:

- Confirm the version of the released solution being downloaded.
- Determine whether a newer version of the same solution already exists.
- Avoid attempting to overwrite a higher released version with an older released version.
- Use **Save As** to create an editable copy when configuration changes are needed.

Use **Save As** when the goal is to create a new editable copy of a released solution instead of overwriting an existing released version.

Solution Preparation Scenario 2: Solution is not Available after Downloading or Saving

This scenario occurs when an OPUS Solution Designer downloads or saves a solution, but the solution does not become available as expected.

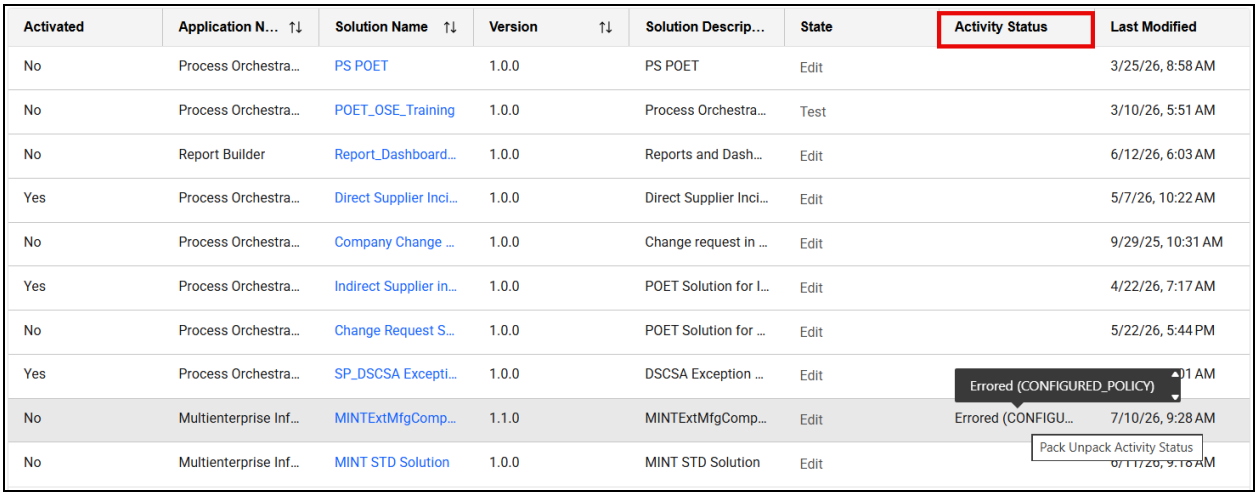
The issue may be caused by a solution unpacking failure. During unpacking, OSE processes the solution package and makes its configuration artifacts available for use. If the package contains a problem, the solution may remain incomplete or fail to become available.

Possible package-level issues may include:

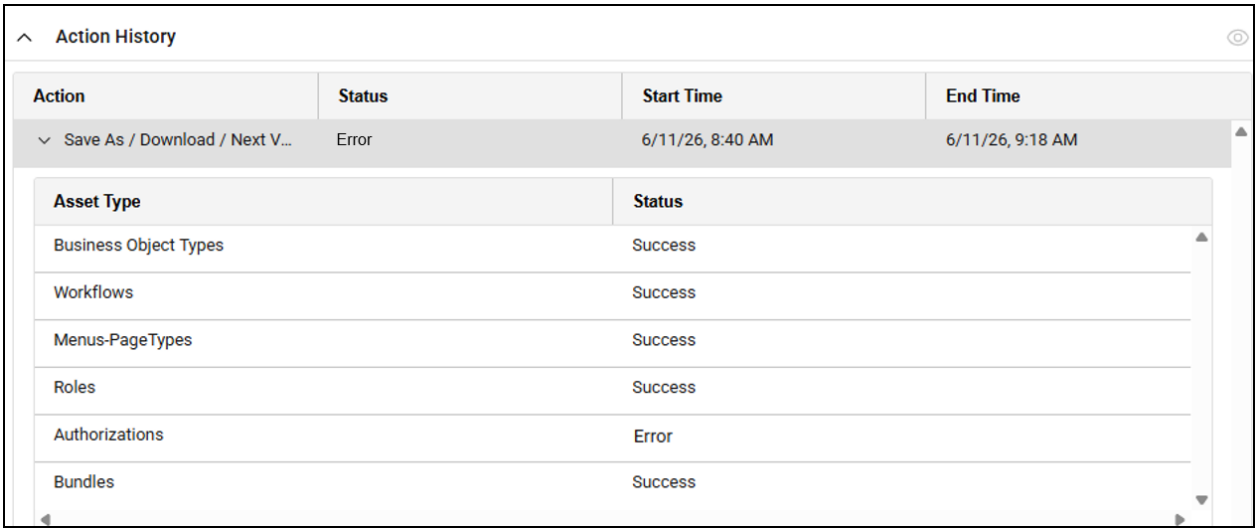
- A missing dependency
- A configuration conflict
- Invalid solution package details

To troubleshoot this issue:

- Review the **Activity Status** column to confirm whether the solution activity completed successfully or is still in progress.



- If the activity did not complete as expected, open **Action History** to review the execution details.



- Check Action History for failed steps or errors that occurred during the download, save, or unpacking process.
- Review any available error details to determine whether the failure is related to a missing dependency, configuration conflict, or invalid package detail.
- If the issue cannot be resolved, collect the **Activity Status, Action History** details, error messages, solution name, and solution version before opening a **Support Case.**

The **Activity Status** column helps identify the current processing status of the solution activity, while **Action History** provides more detailed information about whether any step failed during processing.

Solution Preparation Scenario 3: Unable to Edit Configuration

This scenario occurs when an OPUS Solution Designer cannot edit fields, pages, menus, workflows, or other configuration items.

The issue is typically related to solution life-cycle state. Only solutions in the Edit state can be configured. If the solution is in the Released or Test state, configuration artifacts cannot be edited.

To troubleshoot this issue:

- Check the current life-cycle state of the solution.
- Confirm whether the solution is in **Edit, Test**, or **Released** state.
- If configuration updates are required, confirm that the solution is in **Edit** state.
- If the solution is in **Test** state, create a new version to continue making configuration changes.
- If the solution is in **Released** state, create a new editable version before making updates.
- After the solution is editable, return to the configuration area that requires changes.

Currently, if you need to make changes from a non-editable state, the solution is to create a new version so you can work in an editable copy.

In future updates, solutions in **Test** state will be able to move back to **Edit** state. When that is available, you may be able to return a **Test** solution to **Edit** instead of creating a new version. However, a **Released** solution will still require a new editable version for changes.

Pages Troubleshooting

Page troubleshooting focuses on issues related to page layout, page elements, visibility settings, tables, and navigation behavior within a page.

Common page-related issues may include:

- A button or page element is missing.
- A field or page element does not display as expected.
- Table row text does not open the expected View or Edit page.

Page configuration should be reviewed when the issue is related to what appears on the page or how users navigate from page elements.

Page Troubleshooting Scenario 1: Button is Missing on a Page

This scenario occurs when a button has been added to a page, but it is not visible. For example, the **Save and New** button may not appear on a search page.

The most likely cause is that the button is configured as **Hidden** in the page configuration.

To troubleshoot this issue:

- Open the relevant page configuration.
- Locate the page element or button that is expected to appear.
- Review the visibility configuration for the element.
- Confirm whether the element is configured as hidden.
- If the element should be visible, update the visibility setting.
- Save and validate the configuration.

How to Resolve the issue

1. Log into *opus.tracelink.com.*
2. Select **Main Menu → OPUS Solution Environment**
3. In the side Menu, go to **Available → Company Solution**
4. On the Search Solutions page, click **Filters**.
5. In the **Solution Name** section, search for the solution you want to modify.
6. On the Solution Details page, scroll down and click **New Pages.**
7. From the drop-down, select the page you want to configure.
8. Click **Edit**.
9. On the edit page, you will see hidden elements with a **Hide** icon on them.
10. Select the button and click the **Show** button (eye-shaped) from the top panel to make the button visible.
11. Click **Save** to save the updated configuration and validate on your solution network.

Page Troubleshooting Scenario 2: Table Row Text Does Not Navigate to intended View / Edit page

This scenario occurs when a user clicks row text in a table on the search page, but the expected View or Edit page does not open.

The issue may occur because the **Hyperlink** is missing from the table column or row configuration.

To troubleshoot this issue:

- Open the search page that contains the table.
- Identify the column or row text that should support navigation.
- Confirm whether a hyperlink is configured for the relevant table element.

- Add the hyperlink configuration to the Column as needed.
- Save and validate the configuration.

How to resolve this issue

1. Log into *opus.tracelink.com.*
2. Select **Main Menu** → **OPUS Solution Environment**
3. In the side Menu, go to **Available** → **Company Solution**
4. On the Search Solutions page, click **Filters**.
5. In the **Solution Name** section, search for the solution you want to modify.
6. On the Solution Details page, scroll down and click **Search Pages.**
7. From the drop-down, select the page you want to configure.
8. Click **Edit.**
9. Select the column you want to add Hyperlinks to.
10. From the top panel click the **Configure UI Properties** button.
11. In the right-side panel, turn on the **Enable Hyperlink** button.
12. Click **Apply** and then **Save** to save the configuration.

Workflow Troubleshooting

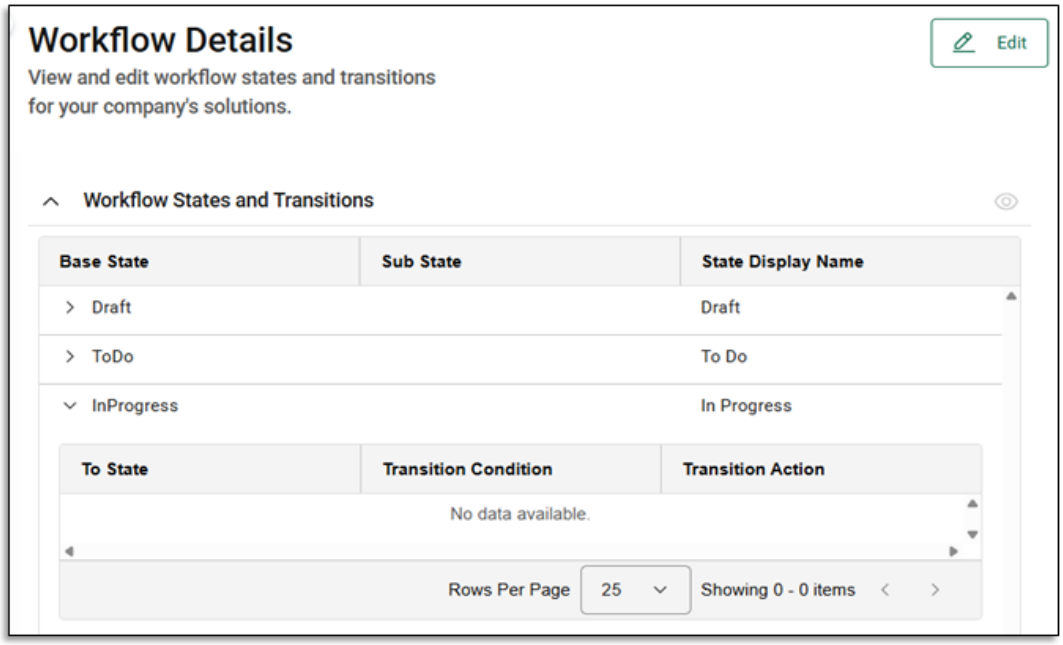
Workflow troubleshooting focuses on issues related to state transitions and workflow actions.

A workflow action may appear available to the user, but the record may remain in the same state after the action is selected. Workflow transitions often depend on required data. If required fields are not populated, the transition would not complete as expected.

Workflow Troubleshooting Scenario 1: Workflow Action does not Move the Record Forward

This scenario occurs when a user selects a workflow action, but the record remains in the same state.

The issue may occur because a required field used by the workflow transition is missing. When required transition data is not populated, the workflow transition would not complete.



To troubleshoot this issue:

- Identify the workflow action selected by the user.
- Confirm the record's current state.
- Check the expected next state.
- Review the workflow transition associated with the selected action.
- Check whether all required fields are populated on the record.
- Populate missing required fields, if needed.
- Test the workflow action again.
- If the issue persists, review Action History to determine whether a process step failed.

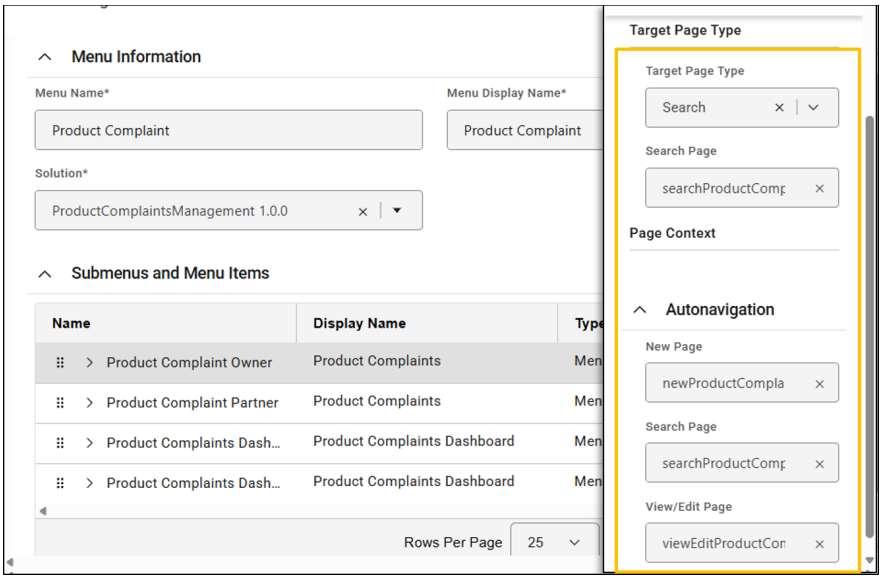
Menu Troubleshooting

A menu item may appear correctly, but still open the wrong page if the menu item is linked to the wrong destination. Menu configuration should be reviewed when a menu item is visible to the user, but selecting it opens an unintended destination page.

Menu Troubleshooting Scenario 1: Menu Item Opens a Different Page

This scenario occurs when a configured menu item is visible to the user, but selecting it navigates to a page other than the intended destination.

This behavior typically indicates that the menu item is associated with an incorrect page in the menu configuration. In OSE, menu items must be mapped to the appropriate destination page so that users are routed to the expected search or detail page.



To troubleshoot this issue:

- Identify the menu item that opens the incorrect page.
- Open the menu configuration.
- Review the page linked to the menu item.
- Update the menu item to link to the correct page, if needed.
- Save and validate the configuration.
- Refresh the user session and test the menu item again.

If a menu item opens the wrong page, review the menu item's configured page link before troubleshooting the destination page itself.

Roles Troubleshooting

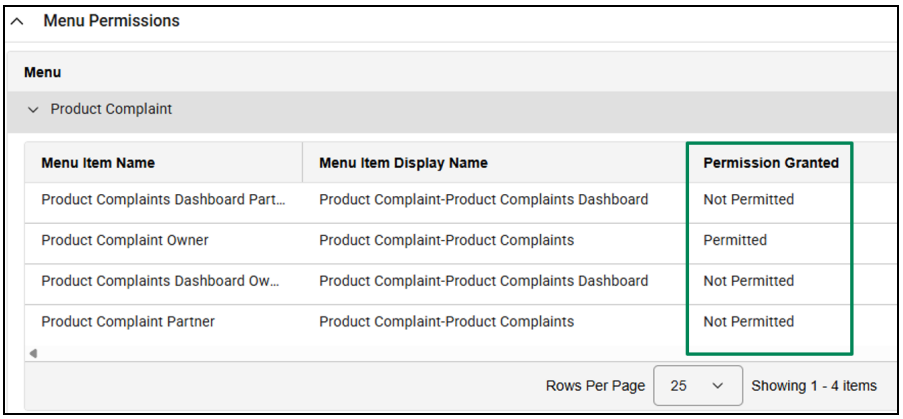
Role-based troubleshooting focuses on user access, visibility, and permissions.

A configuration may be correct, but the configured element may not appear to a user if the user's role does not have the required permission.

Roles Troubleshooting Scenario 1: Menu Item Is Not Visible During Testing

This scenario occurs when a Solution Designer creates a new menu item and links it to the correct page or Business Object Type, but the menu item is not visible when testing the solution.

The issue may occur because the role being used for testing does not have permission to view the new menu item.



To troubleshoot this issue:

- Confirm which role is being used during testing.
- Verify whether the role has permission to view the new menu item.
- Review the permissions assigned to the configured menu element.
- Add or update the required menu permission, if needed.
- Test the solution using the affected role or equivalent permissions.

How to Resolve this Issue

1. Log into *opus.tracelink.com.*
2. Select **Main Menu** → **OPUS Solution Environment**
3. In the side Menu, go to **Available** → **Company Solution**
4. On the Search Solutions page, click **Filters**.
5. In the **Solution Name** section, search for the solution you want to modify.
6. On the Solution Details page, scroll down and click **Roles.**
7. Select the role you are using for testing.
8. Click **Edit.**
9. On the Roles Details page, select **Menu Permissions**
10. In the drop-down, select the **Menu**.
11. Select the **Menu Item** you want to configure.
12. Click the **Edit** icon on the **Menu Permission bar**.
13. In the right side panel, move the **Grant Permission** button to **Permitted**.
14. Click **Apply** and then **Save** to save the configuration.
15. Validate the changes on the network to see the Menu Item to be visible.

Testing Based Troubleshooting

Testing-based troubleshooting focuses on issues that occur after configuration changes have been made and the solution is being tested.

A common testing issue occurs when the Solution Designer updates the configuration, but the tester continues to see the previous behavior. This may happen when the current user session has not refreshed to load the latest configuration. Configuration changes must be saved before testing, and a stale session is a common cause of missing changes.

Testing-Based Troubleshooting Scenario 1: Recent Configuration Changes Are Not Visible

This scenario occurs when recent configuration changes are not visible while testing the solution.

The issue may occur because the current user session has not refreshed to load the latest configuration.

To troubleshoot this issue:

- Confirm that the configuration change was saved and validated.
- Confirm that the solution is being tested in the expected life-cycle state.
- Refresh the current user session by signing out of the environment and then sign back in.
- Test the solution behavior again.

Release Readiness

Before moving a solution to Released, confirm that all configured behavior works as expected. Release readiness validation should include solution state, versioning, workflow behavior, page visibility, role permissions, menu navigation, testing behavior, Action History, and network activation.

Before release, confirm the following:

- The user has the required OPUS Solution Designer role.
- The solution is activated on the network.
- The solution version is correct.
- The solution is in the correct life-cycle state.
- Action History shows no failed steps.
- Elements on pages are visible where expected.
- Menu items are visible and navigate to the correct search pages.
- Work item transitions move to the expected states.
- Roles and permissions are set as intended for created elements.
- Testing behavior matches requirements.

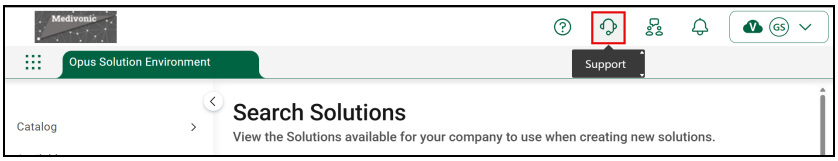
Action History should be reviewed before release to confirm that no failed steps occurred during testing. Make sure the expected behavior is validated across the relevant configuration areas before moving the solution to **Released**.

How to Open a Support Case

If an issue cannot be resolved through troubleshooting, open a support case using the Support options available in OPUS.

To open a support case:

Use the **Support icon** in the OPUS header bar to open a support case with TraceLink.



If the company has access to the **Customer Success Portal**, the Support icon opens the company portal. From the portal, users can log in to create, view, and manage Support Cases.

If the company does not have access to the Customer Success Portal, the Support icon opens the **TraceLink Global Support Request page**. Users can submit the support request form to open a case.

To help TraceLink begin researching the issue, include the following details in the description field:

- Application where the issue occurred, e.g., Administration or MINT
- Business impact of the issue
- Whether the issue is new or recurring
- Detailed steps to reproduce the issue
- Any additional relevant information that might help TraceLink investigate and resolve the case, such as screenshots, error messages or error codes, recent configuration changes, or the time and date when the issue occurred.