TRACELINK UNIVERSITY

Establish Links

Companies that own multienterprise apps can link Partners and internal locations to those apps and their respective networks. These Links allow the Owner and their linked entities to collaborate and exchange data.

To establish Links for native Opus apps (e.g. Agile Process Teams), select the Multi-Network tab, and to establish Links for Track & Trace Services (TTS) apps (e.g. US Compliance), select the Single-Network tab. Not all Links are available in the Opus UI. To administer Links for other TTS apps, go to the TTS UI.

If the app can only have one network, then Owners link Partners and internal locations directly to the app. If the app can have multiple networks, then Owners link Partners and internal locations to a specific network within the app. For example, a Manufacturer that owns Agile Process Teams might create two networks within that APT app (Kendall Supply Network and Kendall US Distribution Network). The Manufacturer could then link the Partners and internal locations they work with for material suppliers to Kendall Supply Network and different Partners and internal locations to Kendall US Distribution Network.

Some enterprise apps also allow Owners to link their internal locations to the app.

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Access to Links

System Administrators and Application Administrators can establish and manage Links, and users and roles within those Links, for apps and their networks.

If an app supports multiple networks, then the Application Administrator role does not itself grant users the permission to establish or manage links for the networks within apps they administer. Users with the Application Administrator role must be separately assigned the Application Administrator role for those specific networks to take these actions.

Establish Links to an application or network

Establish Links

Application Administrators can establish Links only for the apps and their networks where they are assigned the Application or Network Administrator role.

1. Select the Main Menu icon.
2. Select Administration in the main menu.
3. Select Links.
4. Select the tab for the type of Link:
    - Mutli-Network tab – View the Links for native Opus apps (e.g. Agile Process Teams)
    - Single-Network tab – View the Links for Track & Trace Services (TTS) apps that are available in the Opus UI (e.g. US Compliance)
    - Failed tab – Review the Links that could not be established
5. Select the Add Links icon.
6. On Step 1: Network and Invitations:
    a. Fill in the following fields in the Network section:
        i. Application drop-down – Required. The app that the Partner or

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internal location must be linked to.

ii. Application - Network (Owner) drop-down – Conditionally required if the app allows multiple networks. The network that the Partner or internal location must be linked to (enabled only for apps that allow multiple networks).

b. Fill in the following fields in the Entities to Link section:

i. Entity field – Required. The name or identifier of the Partner or internal location to link to the app or network, sourced from the Partners and locations entered in Master Data Exchange.

When linking with a Partner or an internal location, use a TraceLink ID to avoid any issues.

If there is no TraceLink ID in the entity list, the owning Company must add the TraceLink ID of the Partner Location to the Partner locations master data and the TraceLink ID to the company location master data for their internal locations on Track & Trace Services.

c. Select Next.

7. On Step 2: Roles:

a. Select the roles that the linked entities can assign to their users.

Tips

- All selected roles are added to each entity within the Link as specified in Step 1: Networks and Invitations.

b. Select Link.

TraceLink automatically creates the Link and the user can begin exchanging data with the linked entities.

Return to the Links screen and filter to find the Link you just created to see whether or not it was successful.

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Tips

- If the Link failed to process and the Link information is correct, select the Retry Link icon to resubmit the failed Link.

Import Links

Import a CSV file to expedite the process of linking an Owner to a large number of Partners.

1. Select the Main Menu icon.
2. Select Administration in the main menu.
3. Select Links.
4. Select the Import icon to import a list of Partners from a CSV file. The element headers listed below are all required in the CSV file, in order, and separated by commas. The data in the individual cells can be empty if a value is not required.
    - **Entity Identifier Type** – Value required. The identifier type used for this Partner or internal location to link the app or network, sourced from the Partners and locations entered in Master Data.

      Valid values

        - AR_CUIT – 11-character Argentina Tax ID. Format is 00-00000000-0 (e.g. 33-56899856-8). Cannot be set as the Primary Identifier.
        - AM_TIN – 8-character Armenia Taxpayer Identification Number (e.g. 53663456). Cannot be set as the Primary Identifier.
        - BR_CNES – Brazil National Registry of Health Facilities Number (e.g. 3868249).
        - BR_CNPJ – 14-character Brazil Tax/Legal Entity ID. Format is 00.000.000/0001-00 (e.g. 71.116.165/0001-71).
        - BR_CPF – 11-character Brazil Individual Taxpayer Registration

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Number. Format is 000.000.000-00 (e.g. 605.085.153-00). The first 8 digits identify the company, the next 4 digits identify the branch or subsidiary ("0001" designates the headquarters), and the last 2 are check digits.

- BR_PROF_REG – Brazil Professional Registration Number (e.g. CRODFCD9952).
- BY_TIN – 9-character Belarus Taxpayer Identification Number (e.g. 004893223). Cannot be set as the Primary Identifier.
- CN_CHINA_ID – Alphanumeric China identifier (e.g. 352J685B548N).
- CN_FOREIGN_MAH – China Foreign MAH ID (e.g. 0678645).
- CN_FOREIGN_MFR – China Foreign Manufacturer ID (e.g. 665S55D).
- CN_USCID – China Unified Social Credit Identifier (e.g. 9771221453).
- COMPANYID – Alphanumeric internal company identifier (e.g. KENDALL).
- COMPANYSITEID – Alphanumeric internal location, plant, or site identifier (e.g. 465MEMPHIS).
- DE_IFA_REG_NUM – 6-character Informationsstelle für Arzneispezialitäten (IFA) Registration Number (e.g. 548726). Cannot be set as the Primary Identifier.
- DEA – 9-character US Drug Enforcement Agency Number (e.g. F92547851).
- DUNS – 9-character Dunn and Bradstreet Number (e.g. 82-759-6961).
- DUNS4 – 13-character Dunn and Bradstreet Number, which includes a 4 digit extension (e.g. 82-759-6961-KP89).
- GCP – 6- to 12-character GS1 Global Company Prefix (e.g. 8856277).
- GLN – 13-character Global Location Number (e.g. 8856277233311). To send and receive EPCIS messages, companies and locations need a GLN.

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- `HIN` – Maximum 9-alphanumeric character Health Industry Number assigned by HIBCC (e.g. 214Z65H00).
- `ID_BPOM_FACILITYID` – Indonesia Facility ID (e.g. 45764574).
- `IN_COMPANY_ID` – India Company ID (e.g. 5423695784236).
- `IN_GSTN` – India Goods and Services Tax ID (e.g. 55876215).
- `IN_IEC` – 10-character India Importer Exporter Code (e.g. 0255411222). Cannot be set as the Primary Identifier.
- `IN_LOCATION_ID` – India Location ID (e.g. 65874532).
- `IN_MFR` – India Manufacturing Code (e.g. 00552101).
- `IN_MRCH` – India Merchant Exporter Code (e.g. 601227644).
- `IN_PAN` – 10-character India Permanent Account Number. The first five characters are letters, next four numbers, last character is a letter (e.g. AFZPK7190K). Cannot be set as the Primary Identifier.
- `IN_TIN` – 11-character India Taxpayer Identification Number (e.g. 95684444523). Cannot be set as the Primary Identifier.
- `KG_TIN` – 14-character Kyrgyzstan Taxpayer Identification Number (e.g. 56200044505998). Cannot be set as the Primary Identifier.
- `KR_BUS_REG_NUMBER` – 10-character South Korea Corporate Registration Number. Format is xxx-xx-xxxxx (e.g. 324-84-22451).
- `KR_PROVIDER_CODE` – 8-character South Korea Provider Code (e.g. 45632196).
- `KZ_BIN` – 12-character Kazakhstan Business Identification Number (e.g. 220110668755). Cannot be set as the Primary Identifier.
- `RU_ACCOUNT_NUMBER` – 14- to 36-character Russia Account Number (e.g. 19527400000001 or 19406412-0001-000a-0000-000000000022). Cannot be set as the Primary Identifier.
- `RU_INN_FOREIGN_ENTITY` – 10-character Russia Foreign Business Taxpayer Identification Number (e.g. 7744000912). Cannot be set as the Primary Identifier. Only one of the following identifier types

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can be assigned to an entity: RU - INN Local, RU - IN Foreign, and RU - INN Individual.

- RU_INN_INDIV – 12-character Russia Individual Taxpayer Identification Number (e.g. 123456789001). Cannot be set as the Primary Identifier. Only one of the following identifier types can be assigned to an entity: RU - INN Local, RU - IN Foreign, and RU - INN Individual.
- RU_INN_KPP_TAX_CODE – 9-character Russia KPP Registration Code (e.g. 771301001). Cannot be set as the Primary Identifier.
- RU_INN_LOCAL_ENTITY – 10-character Russia Local Business Taxpayer Identification Number (e.g. 7728640746). Cannot be set as the Primary Identifier. Only one of the following identifier types can be assigned to an entity: RU - INN Local, RU - IN Foreign, and RU - INN Individual.
- SGLN – 15-character SGLN format representation of Global Location Number:
    - Format for company entities is [CompanyPrefix].[LocationRef].0 or [CompanyPrefix]..0. The LocationRef segment is optional. If the LocationRef is included, the first two segments contain only digits separated by the dot, and must be 13 characters in total. If the LocationRef is not included, then the first segment must be 12 digits, followed by two dot seperators. The third segment should always be the digit 0. For example, 539885451928..0 or urn:epc:id:sgln:0614141.12345.0.
    - Format for location entities is [CompanyPrefix].[LocationRef].[sub-location identifier] or [CompanyPrefix]..[sub-location identifier].The LocationRef segment is optional. If the LocationRef is included, the first two segments contain only digits separated by the dot, and must be 13 characters in total. If the LocationRef is not included,

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then the first segment must be 12 digits, followed by two dot seperators. The third segment is always alphanumeric and can be any length, with at least one character in it preceded by the dot separator. For example, 8856277.23331.6 or 539885451928..11.

- `TRACELINK_ID` – TraceLink Identification Number (e.g. KENDALLPHARM).
- `UZ_TIN` – 9-character Uzbekistan Taxpayer Identification Number (e.g. 000181244). Cannot be set as the Primary Identifier.

- **Entity Identifier Value** – Value required. The entity ID associated with the entity type for this Partner or internal location to link the app or network, sourced from the Partners and locations entered in Master Data.
- **Send Invitation To** – Value optional. The email of the user at the Partner or internal location who is establishing the Link. If the email is populated, an email is sent to the specified user notifying them that they have been added to the Link. System Administrators from the linked Partner can then manage the Link. The email address must be in a valid email format (e.g. name@tracelink.com).

5. Fill in the following fields in the Import Links section in the Import Links dialog box:
   - Application drop-down – Required. The app that the Partner or internal location must be linked to.
   - Application - Network (Owner) drop-down – Enabled and conditionally required if the app allows multiple networks. The network that the Partner or internal location must be linked to (enabled only for apps that allow multiple networks).
   - Role – The roles that the linked entity can assign to their users.
6. Drag and drop the CSV file or select the browse link to search for the file.
7. Select Import.

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The list of Partners is imported to expedite the process of linking an Owner to a Partner.

Tips

- Application Administrators can establish Links only for the apps and their networks that they are the Application Administrator for.

Modify access to a Link

Modify the roles that the linked entities can assign to their users within the Link, and add users from your company to the Link.

Add roles to a Link

The System Administrator at the Partner or internal location linked to the app or its network can assign these roles to their users that are added to the Link.

Only the Owner can add roles to the Link.

1. Select the Main Menu icon.
2. Select Administration in the main menu.
3. Select Links.
4. Select the tab for the type of Link:
    - Mutli-Network tab – View the Links for native Opus apps (e.g. Agile Process Teams)
    - Single-Network tab – View the Links for Track & Trace Services (TTS) apps that are available in the Opus UI (e.g. US Compliance)
    - Failed tab – Review the Links that could not be established
5. Filter to find the Link.
6. Select the Action icon in the row for the Link.

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7. Select View Link.
8. Select the Add icon on the Roles tab.
9. Select a Role to add to the Link so that the linked entity can assign the role to their users.
10. Select Add.

    The selected roles are added to the Link, and the linked entity can then assign it to their users.

Assign users to a Link

Assign a user to a specific Link to give the user access to collaborate and share data with the Owner. System and Application Administrators can also determine which roles the user is assigned within the Link.

Activate a Link

The System Administrator can activate or deactivate a Link in the Opus Administration UI. When a Link is deactivated, users can still see all historical data, owners can continue to add users, and Partners can add users and roles. All other settings and access configurations associated with the Link are disabled.

1. Select Administration in the main menu.
2. Select Links.
3. Select the tab for the type of Link:
    - Mutli-Network tab – View the Links for native Opus apps (e.g. Agile Process Teams)
    - Single-Network tab – View the Links for Track & Trace Services (TTS) apps that are available in the Opus UI (e.g. US Compliance)
    - Failed tab – Review the Links that could not be established
4. Filter to find the Link.

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5. Select the Action icon in the row for the Link.
6. Select Activate Link.
7. Select Activate.

   The Link is active on the network. All settings and access configured for this Link are enabled.

Tips

- Deactivate a Link by selecting the Action icon in the row for the Link, selecting Deactivate Link, selecting Deactivate.

Filter and view Links

Filter and view Links

1. Select the Main Menu icon.
2. Select Administration in the main menu.
3. Select Links.
4. Select the tab for the type of Link:
   - Mutli-Network tab – View the Links for native Opus apps (e.g. Agile Process Teams)
   - Single-Network tab – View the Links for Track & Trace Services (TTS) apps that are available in the Opus UI (e.g. US Compliance)
   - Failed tab – Review the Links that could not be established
5. Fill in one or more of the following fields to filter the results:
   a. Network multi-select field – Required. The network that the Partner or internal location is linked to.
   b. Linked Entity multi-select field – The Partner or internal location that is linked to the app or network.

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6. Select Apply.

   The filtered results display in the table.

7. Select View Link.

   The View Link screen displays the user's Link information.

See the information that displays

In the Mutli-Network and Single-Network sections:

- Network (Application) field – The network the user is assigned to.
- Owner field – A company who has licensed a particular TraceLink app.
- Linked Entity field – The name or identifier of the Partner or internal location to link to the app or network, sourced from the Partners and locations entered in Master Data Exchange.
- My Company's Role field – The roles of the user assigned to the Link.
- Linked Entity Type field – The name or identifier of the Link to the app or network, sourced from the Partners and locations entered in Master Data Exchange.
- Last Modified field – The date and time of the user's last modification of the Link.

In the Failed Links section:

- Network (Application) field – The network the user is assigned to.
- Entity field – The name of the Partner or internal location to link to the app or network, sourced from the Partners and locations entered in Master Data Exchange.
- Type field – The identifier type used for this Partner or internal location to link the app or network, sourced from the Partners and locations entered in Master Data.
- Roles field – The roles that the linked entity can assign to its users.
- Error Description field – The details about any errors that caused the

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Link to fail.

- Date Created field – The date and time that TraceLink attempted to establish the Link.

In the Roles section:

- Status field – The status of the Link.
- First Name field – The first name of the user assigned to the Link.
- Last Name field – The last name of the user assigned to the Link.
- Email field – The email address of the user assigned to the Link.
- Roles field – The roles of the user assigned to the Link.

Select the Remove icon to remove a user from the Link.

tap

Tips

- If the Link failed to process and the Link information is correct, select the Retry Link icon to resubmit the failed Link.

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