TRACELINK UNIVERSITY

Home
Resources
TraceLink University

Administer FAQs

General

How do I connect with trade partners and internal locations?

TraceLink users can edit their company's profile and add their Partner identifiers to link the Partners to the company's apps and networks. Partners and their locations must already exist as members of the TraceLink Network, and the identifiers entered on the company's Partners tab must match at least one identifier that TraceLink has verified for the Partner. Apps must allow for Links, and the global identifier for the Partner company or location specified in Partner master data should match the identifier specified while adding the company or location.

How do I set up my application so my company can begin using it?

To begin using any Opus app:

Add employees to your company in Track & Trace Services Company Administration so that other users can add them to apps, networks, and Links.

1. If the app allows linking (i.e. a multienterprise app):
   a. Add company locations and their identifiers to your company so that you can link them to the app.
   b. Add Partners and their identifiers to your company in Track & Trace

Services Company Administration so that you can link them to the app.

c. Add Partners and their identifiers to your company so that you can link them to the app.
d. Add Partner companies, locations, and their identifiers to your company so that you can link them to the app.
e. Make sure that the internal locations that you want to link to the app or its network are allowed to link to apps.
f. Make sure that the internal locations that you want to link to the app or its network are allowed to link to apps in Track & Trace Services Company Administration.

2. Add at least one user to the app and assign that user the Application Administrator role.

   In the current release, users can be assigned the Application Administrator role but cannot perform any Application Administrator tasks. Users assigned the Application Administrator role will have access to the role's full functionality in a future release.

3. Configure the app in Track & Trace Services Company Administration to determine whether the app is visible to other companies in Track & Trace Services Community.
4. If the app supports multiple networks, add a least one network to the app, add at least one user to the network, and assign that user the Network Administrator role.

   In the current release, users can be assigned the Network Administrator role but cannot perform any Network Administrator tasks. Users assigned the Network Administrator role will have access to the role's full functionality in a future release.

5. If the app allows linking (i.e. a multienterprise app), in Opus Company Administration:

   a. Link Partners or internal locations.
   b. Your company and the Partner add users to the Link to give them access.

For more information on how to set up applications before they can be used, see the *Company Administration Online Help*.

Contact TraceLink Support for additional help setting up applications for use on the Opus Platform.

Do I still need to use Track & Trace Services Company Administration or Management?

For Opus apps: Yes. All configuration for the company (e.g. editing the company's profile, configuring settings at the company level, adding trade partner identifiers, identifiers) must be done within Track & Trace Services Company Administration. No other configuration for the company, apps, Links, or users can be done in Track & Trace Services for Opus apps.

For Track & Trace Services apps: Yes. All configuration for Track & Trace Services apps must be done in Track & Trace Services Company Administration and Management.

How do I access Track & Trace Services apps in the Opus Web UI?

An Opus Platform user with the Member - Classic Access role can access all Track & Trace Services (TTS) apps embedded within the Opus Platform at opus.tracelink.com. It is not necessary to switch between multiple URLs to access TTS apps. The TTS apps display in the Opus Platform UI Networks drop-down. After selecting a TTS app, the Team and Process drop-downs are disabled, and an iFrame displays the classic TTS Web UI for the app selected. The classic TTS Web UI screen navigation within the app remains available inside the iFrame, and the TTS help documentation is also still available for each app from the existing TTS Help icons.

To access these new side menu items, the existing Opus Administration solution includes the following new roles, which must be assigned as Administrator roles:

- Classic Administrator – Allows users to access the new Company Administration (Classic) side menu item.

- Classic Manager – Allows users to access the new Management (Classic) side menu item.

Like the Track and Trace and Compliance apps, the existing Opus Master Data solution also has a new Member - Classic Access role that gives users access to the Master Data Exchange (Classic) side menu item described below.

If any TTS apps also have Opus experiences (e.g. US Compliance), the Team and Process drop-downs remain enabled, but any selections made in these drop-downs do not impact the classic TTS Web UI. The embedded classic TTS Web UI might not display by default for these networks. In this case, select the classic side menu item (e.g. US Product Track (Classic) for the US Compliance network).

What are solutions?

TraceLink apps are extended through **solutions**, which pull together assets that define how the app looks and functions when users interact with it (i.e. the app's data model, pages workflows, roles, and policies). Solutions available in the Marketplace Catalog can be saved as Company Solutions and configured to meet a company's specific use cases and business needs.

Which events are captured in the audit trail?

The following Administer events are captured in the Track & Trace Services audit trail:

functionalArea	businessObjectType	action	Description
Networks	Process Network Administration	Add Network	Captures when Application Administrators add a new network.
Networks	Process Network Administration	Edit Network	Captures when administrators edit the network.
Networks	Process Network Administration	Remove User from Network	Captures when administrators remove a user from the network.
Master Data	Company Master Data	Edit Company Master Data	Captures when users edit master data records for a company.
Master Data	Company Master Data	Remove Company Master Data	Captures when users remove master data records for a company.
Master Data	Company Location Master Data	Add Company Location Master Data	Captures when users add master data records for company internal locations.
Master Data	Company Location Master Data	Edit Company Location Master Data	Captures when users edit master data records for company internal locations.
Master Data	Company Location Master Data	Remove Company Location Master Data	Captures when users remove master data records for company internal locations.
Master Data	Partner Master Data	Add Partner Company Master Data	Captures when users add master data records for a Partner.
Master Data	Partner Master Data	Edit Partner Company Master Data	Captures when users edit master data records for a Partner.
Master Data	Partner Master Data	Remove Partner Company Master Data	Captures when users remove master data records for a Partner.
Master Data	Partner Location Master Data	Add Partner Location Company Master Data	Captures when users add master data records for Partner internal locations.
Master Data	Partner Location Master Data	Edit Partner Location Company Master Data	Captures when users edit master data records for Partner internal locations.

functionalArea	businessObjectType	action	Description
Master Data	Partner Location Master Data	Remove Partner Location Company Master Data	Captures when users remove master data records for Partner internal locations.

All other events are captured with the same audit trail entries as the Track & Trace Services Company Administration and Management events.

Which apps support Administer?

- Administration, version 2023.1
- Administration, version 2023.2
- Administration, version 2023.3
- Administration, version 2023.4
- Master Data Exchange, version 2023.1
- Master Data Exchange, version 2023.2
- Master Data Exchange, version 2023.3

Administer Apps	Menu Items
Master Data Exchange	The Master Data Exchange app allows owners and Partners to search for and view and edit master data records in order to track and leverage information necessary to complete operations needed for serialized production, shipping and receiving, and regulatory compliance.
Administration Application	**Links** The Administration app provides support for companies that own Opus apps to link Partners and internal locations to those apps and their respective networks. Owners can chose which roles the linked entity can assign to their user within the Link. **Users** The Administration app provides support for System Administrators to assign users to roles, deactivate users and search for and view users and roles. **Networks** The Administration app provides support for Owners to add networks only for apps that support multiple networks.

Master Data

Where is the added or edited master data?

If you see a success message indicating that your additions or edits were made on the Add or Edit company, Partner, or product master data screens but you do not see the content immediately, the updates will display momentarily. If you are a Track & Trace (TTS) customer, your master data needs to be called back to TTS and brought to the Opus Platform. In this case, there can be a delay displaying the added or edited content in the Opus Platform.

Roles

What are the administrator roles?

The following administrator roles can be assigned to users:

- **System Administrator** – Each company must have at least one user assigned the System Administrator role, which allows these administrators to configure company data, add users to the company, and assign roles to these users.
- **Application Administrator** – Each app has an Application Administrator role. In the current release, users can be assigned the Application Administrator role and the role can be scoped to a list of specific apps and networks. Users assigned the Applications Administrators role will be able to configure the app, establish links with Partners, add users, and assign users roles within the app.
- **Classic Administrator** – Allows users to access the new Company Administration (Classic) side menu item.
- **Classic Manager** – Allows users to access the new Management (Classic) side menu item.
- **Member - Standard Audit Trail Access** – Allows users to access the Audit Trail Events menu item to export audit trail data which, provides visibility into the exact date and time that a particular user made a change, the data that was updated, and where the change occurred (e.g. which application, whether the user touched the UI).

What are the master data roles?

The following master data roles can be assigned to users:

- **Full Access** – Allows users to administer the Master Data solution that their company owns to edit company information and add and edit company locations, Partner information, Partner locations, and product information using the your company, Partner, and product APIs. This user can enable linking to individual locations and view locations, and import locations with the APIs.
- **Member - Expanded UI Access** - Allows users to administer the Master Data solution that their company owns to filter and view and export the company information, company locations, Partner information, Partner locations, and product information.
- **Member - Classic Access** - Allows users to access the Master Data Exchange (Classic) side menu item.

At this time, a user needs to be assigned the **Full Access** role and the **Member - Expanded UI Access** role to add and edit the company information, company locations, Partner information, Partner locations and product information in the Administer UI.

How do roles provide users with access?

Roles group a set of permissions for specific actions (either in the UI or via API), side menu items, and data within an app. The solution applied to the app or its network determines which roles are available. Administrators assign users to roles when they assign users to an app, its network, or its Links.

Owners assign specific roles to Links, allowing their Partners to assign those roles to the Partner users with access to the Link.

How do I add or edit roles?

Companies must own Opus Solution Environment (OSE) to add or edit roles. If your company owns OSE and you also have the Solution Designer role assigned, you can add new roles to a Company Solution or edit existing roles by navigating to OSE and selecting Roles in the side menu. See the Opus Solution Environment Help Center for more information. If your company does not own OSE, then contact TraceLink Support for more information.

Event Notifications

What notifications are available for Administer?

Administer users can sign up to receive email notifications for the following events.

Notification settings

- Bulk Link to Network – The users will receive a notification in the Notifications panel when the CSV file is ready for download. The users can also receive an email when the CSV file is ready for download.
- Partner Link to Network – The users will receive a notification in the Notifications panel when the CSV file is ready for download. The users can also receive an email when the CSV file is ready for download.

What notifications are available for Master Data?

Master Data users can sign up to receive email notifications for the following events.

Notification settings

- Master Data file export completed – The users will receive a notification in the Notifications panel when the CSV file with master data is ready for download. The users can also receive an email when the CSV file with master data is ready for download.
- Master Data migration completed – The users will receive a notification in the Notifications panel when master data is migrated from Track & Trace Services

(TTS) to Opus.

Opus Platform

Which browsers does the Opus Platform support?

The Opus Platform supports the following web browsers:

- **Google Chrome**: Versions 57, 68, 74, or above
- **Microsoft Edge**: Version 80 or above
- **Microsoft Edge (Legacy)**: Versions 16, 17, and 18
- **Mozilla Firefox**: Versions 60, 63, 67, or above
- **Apple Safari**: Versions 12.1.2, 13.0, or above

The Opus Platform supports the following mobile browsers:

- **Google Chrome Mobile**: Version 80.0 or above
- **Android Web View**: Version 80.0 or above
- **iOS Safari**: Version 13.1 or above

Related Content

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The networks in the network composer and the apps in the main menu display in alphabetical order.
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