TRACELINK UNIVERSITY

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

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

c. Add Partners and their identifiers 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 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 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

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Administration:

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

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

Yes. All company configuration can now be performed in OPUS Master Data, and access to TTS Master Data is no longer required. However, until the OPUS Master Data 2026.2.0 release, the following updates can still be completed in TTS Master Data:

- Add or update Company Logo
- Add or update Product Logo

Yes. All configuration can be managed through OPUS Master Data, with no need to access TTS Master Data, except for Company Logo and Product Logo updates as noted above until the 2026.2.0 release.

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

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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.

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functionalArea	businessObjectType	action	Description
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.
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?

Administer Apps	Menu Items
Company Administration	Users and Roles The Company Administration app provides support for System Administrators to assign users to roles, deactivate users and search for and view users and roles.
Application Administration	Links The Application 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 choose which roles the linked entity can assign to their user within the Link.
Master Data Exchange	The Master Data Exchange app allows Internal TraceLink users to migrate Master Data from Track & Trace Services (TTS) to OPUS.
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.

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Administer Apps	Menu Items
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. **B2B Integration** The Administration app provides support for network Owners and their Partners to exchange B2B messages. **My Network Company** The Administration app provides support for Company Administrators to edit and view a company's profile, a business logo, headquarters information, and business contact.

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 OPUS. In this case, there can be a delay displaying the added or edited content in the OPUS.

What do master data imports do, and when do they succeed or fail?

Master data imports allow users to upload and update foundational business data (e.g. company locations, partners, partner Locations, and products) in bulk. An import succeeds when the file meets all format, validation, and data requirements; it fails if required fields are missing, values are invalid, or the data does not meet system validation rules.

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Company location import

What actions are supported in the company location import?

User can:

- Add new company locations.
- Update existing company locations.
- Add, update, or delete identifiers.
- Change the primary identifier.
- Add, update, or delete regulatory licenses.
- Import multiple locations in one file.
- Perform partial updates using an exported CSV.

When does a company location import succeed?

If any of the requirements listed below are not met, the import fails.

An import succeeds when:

- The file is a valid CSV file.
- The headers match the OPUS CSV template.
- The system accepts the file and proceeds to validation.

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- Multiple Company Location records in one file are processed independently.
- Primary Identifier Type and Primary Identifier Value are populated in the root row.
- Location Name and Status are populated in the root row.
- At least one Identifier row is included.
- Identifier Type, Identifier Value, and Is Primary are populated.
- Exactly one identifier is marked as primary for each record (for each company or entity being imported).
- A new Company Location is created when the identifier does not already exist.
- An existing Company Location is updated when the Primary Identifier matches.
- Non-primary identifiers can be added.
- The primary identifier can be changed while maintaining exactly one primary.
- Non-primary identifiers can be deleted.
- Regulatory License Country and Regulatory License Number are provided when license rows are included.
- Regulatory License delete and update actions are valid.

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- Identifier and regulatory license arrays align correctly.
- Array rows immediately follow the root row.

When does a company location import fail?

An import fails if:

- Processing stops after the first failed row.
- The file is not in CSV format.
- The CSV file is empty.
- Required headers are missing.
- Primary Identifier Type is missing.
- Primary Identifier Value is missing.
- Primary Identifier Type and Value differ across rows of the same record.
- Array rows appear before the root row.
- Location Name is missing.
- Status is missing in the root row.
- Status in the root row contains a value other than Active or Inactive.

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- Non-array fields are populated in child rows.
- No identifier rows are provided.
- Identifier Type, Identifier Value, or Is Primary is partially populated.
- Is Primary contains a value other than Yes or No.
- No identifier is marked as primary.
- More than one identifier is marked as primary.
- An attempt is made to delete the primary identifier.
- Identifier Action contains a value other than empty or Delete.
- Regulatory License Country is missing when Regulatory License Number is provided.
- Regulatory License Number is missing when Regulatory License Country is provided.
- Regulatory License Action contains a value other than empty or Delete.
- A blank row appears between the root and array rows.
- Array rows are not contiguous.
- Array data is associated with the wrong record.

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- For CSV imports, if an error occurs in any row of the file, processing stops immediately. No subsequent records are processed after the first failure.

Partner import

What actions are supported in the partner import?

You can:

- Add new partners.
- Update existing partners.
- Manage the full identifier lifecycle (add, update, delete, change primary).
- Manage regulatory licenses.
- Import multiple partners in a single file.
- Handle multi-row identifier and regulatory license arrays.

When does a partner import succeed?

If any of the requirements listed below are not met, the import fails.

An import succeeds when:

- The file matches the OPUS Partner CSV template.
- Required headers are present.

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- The system accepts the file and begins validation.
- Multiple Partner records in one file are processed independently.
- Primary Identifier Type and Primary Identifier Value are provided.
- Company Name and Status are provided.
- At least one Identifier row is included.
- Identifier Type, Identifier Value, and Is Primary are populated.
- Exactly one identifier is marked as primary for each record (for each company or entity being imported).
- A new Partner is created when the identifier does not already exist.
- An existing Partner is updated when the Primary Identifier matches.
- Non-primary identifiers can be added.
- The primary identifier can be changed while maintaining exactly one primary.
- Non-primary identifiers can be deleted.
- Regulatory License Country and Regulatory License Number are provided when license rows are included.
- Regulatory License delete and update actions are valid.

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- Identifier and regulatory license arrays align correctly.
- Array rows follow the root row immediately.

When does a partner import fail?

An import fails if:

- Processing stops after the first failed row.
- Primary Identifier Type is missing.
- Primary Identifier Value is missing.
- Primary Identifier Type and Value differ across rows of the same record.
- Company Name is missing.
- Status is missing in the root row.
- Status in the root row contains a value other than Active or Inactive.
- Non-array fields are populated in child rows.
- No identifier rows are provided.
- Identifier Type, Identifier Value, or Is Primary is partially populated.
- Is Primary contains a value other than Yes or No.

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- No identifier is marked as primary.
- More than one identifier is marked as primary.
- An attempt is made to delete the primary identifier.
- Identifier Action contains a value other than empty or Delete.
- Regulatory License Number is provided without Regulatory License Country.
- Regulatory License Action contains a value other than empty or Delete.
- A blank row appears between the root and array rows.
- Array rows are not contiguous.
- Array rows are associated with the wrong Partner record.

Partner Location import

What actions are supported in the partner location import?

You can:

- Add new partner locations.
- Update existing partner locations.
- Manage the full identifier lifecycle (add, update, delete, change primary).

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- Manage the full regulatory license lifecycle.
- Validate partner - location linkage.
- Enforce array alignment rules.

When does a partner location import succeed?

If any of the requirements listed below are not met, the import fails.

An import succeeds when:

- The file matches the OPUS Partner Location CSV template.
- Required headers are present.
- The system accepts the file for validation.
- Multiple Partner Location records in one file are processed independently.
- Primary Location Identifier Type and Primary Location Identifier Value are populated in the root row.
- Primary Partner Identifier Type and Primary Partner Identifier Value are populated in the root row.
- Location Name and Status are populated in the root row.
- At least one Location Identifier row is included.

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- Location Identifier Type, Location Identifier Value, and Is Primary are populated.
- Exactly one identifier is marked as primary for each record (for each company or entity being imported).
- A new Partner Location is created and linked to the referenced Partner.
- An existing Partner Location is correctly identified for updates.
- Core attributes (e.g., Location Name, Status, Address) are updated when provided.
- Non-primary identifiers can be added.
- The primary identifier can be changed while maintaining exactly one primary.
- Non-primary identifiers can be deleted.
- Regulatory License Country and Regulatory License Number are provided when license rows are included.
- Regulatory License delete and update actions are valid.
- Identifier and regulatory license arrays align correctly.
- Array rows immediately follow the root row.

When does a partner location import fail?

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An import fails if:

- Processing stops after the first failed row.
- The primary location identifier type is missing.
- The primary location identifier value is missing.
- The primary location identifier type and value differ across rows of the same record.
- The primary partner identifier type is missing.
- The primary partner identifier value is missing.
- The referenced partner does not exist.
- Location Name is missing.
- Status is missing in the root row.
- Status in the root row contains a value other than Active or Inactive.
- Non-array fields are populated in child rows.
- No identifier rows are provided.
- Identifier Type, Identifier Value, or Is Primary is partially populated.

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- Is Primary contains a value other than Yes or No.
- No identifier is marked as primary.
- More than one identifier is marked as primary.
- An attempt is made to delete the primary identifier.
- Identifier Action contains a value other than empty or Delete.
- Regulatory License Number is provided without Regulatory License Country.
- Regulatory License Action contains a value other than empty or Delete.
- A blank row appears between the root and array rows.
- Array rows are associated with the wrong Partner Location record.

Product import

What actions are supported in the product import?

You can:

- Add new Products.
- Modify existing Products.
- Manage the full identifier lifecycle (add, update, delete, change primary).

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- Manage the regulatory license lifecycle (if applicable to Product).
- Handle multi-row identifier and regulatory license arrays.
- Support bulk import behavior with independent processing of each Product record.

When does a product import succeed?

If any of the requirements listed below are not met, the import fails.

An import succeeds when:

- The file matches the OPUS Product CSV template.
- Required headers are present.
- The system accepts the file and begins validation.
- Multiple Product records in one file are processed independently.
- Primary Product Identifier Type and Primary Product Identifier Value are provided in the root row.
- Product Name and Status are populated in the root row.
- At least one Product Identifier row is included.
- Identifier Type, Identifier Value, and Is Primary are populated.

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- Exactly one identifier is marked as primary for each record (for each company or entity being imported).
- A new Product is created when the identifier does not already exist.
- An existing Product is updated when the Primary Product Identifier matches.
- Non-primary identifiers can be added.
- The primary identifier can be changed while maintaining exactly one primary.
- Non-primary identifiers can be deleted.
- Regulatory License Country and Regulatory License Number are provided when license rows are included.
- Regulatory License delete and update actions are valid.
- Identifier and regulatory license arrays align correctly per OPUS slicing rules.
- Array rows follow the root row immediately.

When does a product import fail?

An import fails if:

- Processing stops after the first failed row.
- Primary Product Identifier Type is missing.

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- Primary Product Identifier Value is missing.
- Primary Product Identifier Type and Value differ across rows of the same record.
- Product Name is missing.
- Status is missing in the root row.
- Status in the root row contains a value other than Active or Inactive.
- Non-array fields are populated in child rows.
- No Product Identifier rows are provided.
- Identifier Type, Identifier Value, or Is Primary is partially populated.
- Is Primary contains a value other than Yes or No.
- No identifier is marked as primary.
- More than one identifier is marked as primary.
- An attempt is made to delete the primary identifier.
- Identifier Action contains a value other than empty or Delete.
- Regulatory License Number is provided without Regulatory License Country.

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- Regulatory License Action contains a value other than empty or Delete.
- A blank row appears between the root and array rows.
- Array rows are associated with the wrong Product record.

Roles

What are the master data roles?

Companies that own or link to OPUS apps have access to the Master Data menu item, which displays in the side menu of OPUS. The Partners functionality available to users depends on the role they are assigned.

The following master data roles can be assigned to users:

- **Company Data Manager** - Allowed to administer and manage information about their company's headquarter and locations.
- **Company Data Viewer** - View-only access to company Master Data information.
- **Full Access** - Full access to Master Data APIs to support legacy OPUS integrations and ensure backward compatibility.
- **Master Data Administrator** - Allowed to administer and manage information about their company headquarters and locations, partner and partner locations, and product.
- **Master Data Viewer** - View-only access to company, partner, and product Master Data information.
- **Partner Data Manager** - Allowed to administer and manage information about their partner companies and partner locations.
- **Partner Data Viewer** - View-only access to partner Master Data information.
- **Product Data Manager** - Allowed to administer and manage information about their product.

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- **Product Data Viewer** - View-only access to product Master Data information.

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.

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.

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OPUS

Which browsers does the OPUS support?

The OPUS supports the following web browsers:

- **Google Chrome** (recommended): Versions 57, 68, 74, or above
- **Microsoft Edge**: Version 113 or above

  For the most stable and optimized performance, use Google Chrome. When using Microsoft Edge, additional configuration may be required to ensure optimal performance. See the *My OPUS experience is slow in Microsoft Edge* in the *Troubleshoot a Problem* topic for Microsoft Edge-specific guidance.

- **Mozilla Firefox**: Versions 60, 63, 67, or above
- **Apple Safari**: Versions 12.1.2, 13.0, or above

The OPUS 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

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