TRACELINK UNIVERSITY

Users

Users must be registered on the TraceLink Network to be assigned roles within applications, networks, and Links. Administrators can assign users from their own company to specific applications, networks, or Links. System Administrators can add users and assign any role within the company. They can also view a list of their company users (i.e. users with company memberships) and Partner users who have been added to their networks or Links.

Access to assigning users and roles

System Administrators and Network and App Administrators can assign users to roles directly within a Link or within a specific app or network. However, Network and App Administrators can perform these actions only if a System Administrator has assigned them the appropriate roles. When granted the necessary permissions, Network and App Administrators can add company or external users to specific networks or applications, manage user roles, and configure application settings within their designated areas.

Add a new user to the company

A User Administrator can add new users to the company. System Administrators, Network and App Administrators can assign those users to networks and applications.

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1. Select the Main Menu icon.
2. Select Administration in the main menu.
3. Select Users from the left menu.
4. Select Company Users from the left menu.
5. Select the New button.
6. Fill the following fields in the New User screen.
    a. Email field – Required. The email address of the user to assign. The user must not already be registered on the TraceLink Network as a member of another company.
    b. First Name field – Required. The first name of the user to add.
    c. Last Name field – Required. The last name of the user to add.
7. Select the Save button to add the user and close the panel or Save and New to add the user and refresh the panel with blank fields.

    The user is added to the company and sent an activation email. The activation email includes a link to register on the TraceLink Network. The user must select the registration link first, go through the registration process, return to the email to select the invitation link and accept the invitation, and then the user is added to the company. If the user is not assigned any roles, the user can log in to TraceLink but cannot access any apps, networks, or Links.

    Keep in mind the following about the activation email and registration link:

    - The activation email includes a link to register on the TraceLink Network only if the user does not already exist in OPUS (in either the validation or production environment). If the user already exists in one environment and is added to another, the activation email is not sent.

    - The registration link expires after 24 hours. Select the link in the activation email again and complete the registration process. If the

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registration link expires five times, contact TraceLink Support.

8. Select the Email hyperlink from the results table.

   The Company Users Details screen displays.

9. Select the Edit button to add additional user details.

10. Fill in the following fields in the Account Information section:

    i. First Name field – Required. The first name of the user to add.
    ii. Last Name field – Required. The last name of the user to add.
    iii. Email field - The email address of the user to assign. The user must not already be registered on the TraceLink Network as member of another company.
    iv. Status – Indicates whether the account is active or inactive.

    Select Inactive from the Status drop-down to deactivate the user account.

    v. Privileged User field – Indicates whether the user is designated as a Privileged User. This designation allows separate minimum password length requirements to be applied to the user's account when configured by a System Administrator.

    - Yes – The user is designated as a Privileged User and can be subject to separate minimum password length requirements.

    - No – The user is not designated as a Privileged User and is subject to the standard minimum password length requirements.

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11. Fill in the following fields in the Login Information section:

    a. Account State field – User account status.

        - Unlocked – This is the default option. Indicates that the user account is active and accessible.
        - Locked – Indicates that the user account is inactive and cannot be accessed.

12. In the Administered Networks section, select the add + icon on the top right of the Network table.

    i. In the side panel, select a network to assign user the Network Administrator role from Network drop-down list.

    ii. Select Apply.

    The Network is added to the Networks table.

13. In the User Roles section, select the Expand ⌄ icon below Application - Network table header.

    The role assigned to the selected application or network is displayed.

14. Select the Save button.

    The newly added company user details display in the results table.

Tips

- From the Administered Networks section, select a Network, select the Delete − icon, and then select Apply to unassign the user from the Network

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Administrator role.

Filter and view a company user

System Administrators and Network and App Administrators can filter and view company users to quickly locate specific accounts for review, management, or assignment to networks, apps, or Links.

1. Select the Main Menu icon.
2. Select Administration in the main menu.
3. Select Users from the left menu.
4. Select Company Users from the left menu.
5. Select the Filter button.
6. In the Filters side panel, fill in the Email field.
7. Select Apply.

   The filtered results display in the table.

8. Select the Email hyperlink in the results table.
9. View the following information in the Company User Details screen:
   a. Account Information section:
      i. First Name field – Required. The first name of the user to add.
      ii. Last Name field – Required. The last name of the user to add.
      iii. Email field – The email address of the user to assign. The user must not already be registered on the TraceLink Network as member of another company.
      iv. Status – Indicates whether the account is active or inactive.
      v. Privileged User field – Indicates whether the user is designated as a

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Privileged User. This designation allows separate minimum password length requirements to be applied to the user's account when configured by a System Administrator.

- Yes – The user is designated as a Privileged User and can be subject to separate minimum password length requirements.

- No – The user is not designated as a Privileged User and is subject to the standard minimum password length requirements.

a. Login Information section:

i. Account State field – The status of the user account.

- Unlocked – Default. The user can log in without restrictions.
- Locked – Account access is restricted.

ii. Failed Login Attempts field – Displays the number of unsuccessful login attempts made by the user before the account is locked.

iii. Last Login field – Displays the most recent date and time the user successfully logged into the system.

iv. Password Valid Until field – Displays the expiration date of the user's password, after which a reset will be required.

v. Password Last Changed field – Indicates the date and time when the user's password was last updated.

vi. Last Updated field – Displays the most recent date and time when any changes were made to the user's account information.

a. The Administered Networks section:

i. The Network table displays the network where the user has

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administrator access.

b. In the User Roles section, select the Expand icon for an application or network to view the roles assigned to the selected application or network.

   i. Application - Network field – Displays the application or network assigned to the user.

   ii. Link field – Displays the company or partner link associated with the application or network.

   iii. User Group Name field – Displays the user group through which the role assignment is inherited, if applicable.

   iv. Role Name field – Displays the name of the role assigned to the selected application or network.

   v. Role Description field – Displays a description of the assigned role.

Tips

- Select the Edit button to add additional user details.
- Select the New button to add another new user.

In the current release, a System Administrator for Track & Trace Services (TTS) must add the user to the company in TTS Administration. If their company is already enabled with TraceLink Single Sign-On (TraceLink SSO), the user is automatically enabled with the TraceLink SSO. If their company is not enabled with

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the TraceLink SSO and they own an Opus solution, they can contact TraceLink Support to enable the company and all its users with the TraceLink SSO.

Import company users

Import a CSV file to bulk-add users to the company.

1. Select the Main Menu icon.
2. Select Administration.
3. Select Users from the left menu.
4. Select Company Users from the left menu.
5. Select the Import button on the top right corner of the screen.
6. In the Input File field, drag and drop the CSV file or select the browse link to search for the file. The element headers listed below are in order and separated by commas. The data in the individual cells can be empty if a value is not required.
    - Email field – The email address of the user, used for login and system notifications.
    - First Name field – The first name of the user.
    - Last Name field – The last name of the user.

    Download a sample CSV file
7. Select Apply.

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The list of Company Users displays in the table.

Export company users

Export a CSV file of Company Users to review, edit, and re-import user details in bulk using a compatible format.

1. Select the Main Menu icon.
2. Select Administration.
3. Select Users from the left menu.
4. Select Company Users from the left menu.
5. Select the Export button on the top right corner of the screen. The CSV file is imported to streamline the process of managing multiple Company Users at once.
6. Fill in a name in the Activity Name field.
7. In the Output Format drop-down, select the following options:
   - Detailed File Format – Used to export a CSV for reporting, offline review, or analysis.
   - Import-Compatible File Format – Used to export a CSV that can be edited and re-imported to update, create, or deactivate users in bulk.
8. Select Apply.

   A notification displays indicating that the export is queued. When ready, a second notification displays in the Notifications section in the top-right corner of the screen.

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9. Select the Notification icon.

10. Select View details to open the Import/Export section in the OPUS Platform.

11. In the Export Details screen, select the file hyperlink to download the CSV file.

Add a company user or external user to a specific network or app

System Administrators and Application Administrators can add a company user or external user to a specific network or app that they administer.

1. Select the Main Menu icon.
2. Select Administration in the main menu.
3. Select Users from the left menu.
4. Select Network Members from the left menu.
5. Select the New button.
6. Fill in the following fields in the New Network Membership screen:
    a. **User Type** section:
        i. User Type drop-down – Required. Allows you to select the type of user.
        - Internal – A user from the Owner company.
        - External – A user from any company on the TraceLink Network.

a. **User Information** section:
    i. User Name drop-down – Required. The name of the user. This field is enabled only when Internal user is selected in the User Type drop-down.
    ii. Email field – Required. The email address of the user to assign. The user must not already be registered on the TraceLink Network as member of another company. This field is enabled only when External user is selected in the User Type drop-down.

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a. **Network Information** section:

i. Application drop-down – Required. The name of the app.

ii. Link Name drop-down – The name of the Link that defines the user's role in the network.

iii. Network Name drop-down – The name of the network associated with the selected app and team.This drop-down appears only for multi-enterprise apps, such as MINT and POET.

a. Roles section:

i. Roles drop-down – Required. One or more roles that define the user's permissions in the selected network. Use the Add + icon to assign each role.

1. Select the Save button.

The network or app member is added, and their details display in the results table.

Tips

- Select the Save and New button to save the new network or app user and add another.

- To remove a user from network or app:

i. Select a network or app from the Search Network Members table.

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ii. Select the Delete icon. The Remove User from Network side panel appears.

iii. Select Apply.

The user is removed from the network or app and no longer appears in the Networks table.

Filter, view, and edit a network member

System Administrators and Application Administrators can filter and view network members to quickly locate specific network members and review their network membership details.

1. Select the Main Menu icon.
2. Select Administration in the main menu.
3. Select Users from the left menu.
4. Select Network Members from the left menu.
5. Fill in one or more of the following fields in the Filters side panel:

   a. Application/Network (Owner) drop-down – Required. The app or network associated with the network member.

   b. Link drop-down – The Link associated with the network member.

   c. Business Team drop-down – The business team associated with the network member.

   d. Email field – The email address of the network member.

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6. Select the Email hyperlink in the results table.

7. View the following information:

   - **User Information** section – Displays the user name.
   - **Network Information** section – Displays the application name, network name, Link name, and user group associated with the network member.
   - **Roles** section – Displays the roles assigned to the network member.
   - **Business Team Information** section – Displays the business teams associated with the network member.

2. Select the Edit button.
3. View the User Information and Network Information sections. The existing user and network information cannot be modified.
4. Fill in the following information in the Roles section:

   - Roles drop-down – Required. Select a role to assign to the network member. Select the Add + icon to assign another role.

5. Fill in the following fields in the Business Team Information screen:

   - Business Team drop-down – Select a business team to associate with the network member. Select the Add + icon to associate another business team.

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6. Select the Save button.

The updated network member details display on the Network Member Details screen.

Tips

- In the Roles section, select a role and select the Remove − icon to remove the role assignment.

- Select the View button to return to the read-only view of the network member details without leaving the Network Member Details screen.

Import network members

Import a CSV file to bulk-create Network Members.

1. Select the Main Menu ⁝⁝⁝ icon.
2. Select Administration.
3. Select Users from the left menu.
4. Select Network Members from the left menu.
5. Select the Import button on the top right corner of the screen. The CSV file is imported to streamline the process of managing multiple Network Members at once.
6. In the Input File field, drag and drop the CSV file or select the browse link to search for the file. The element headers listed below are in order and

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separated by commas. The data in the individual cells can be empty if a value is not required.

- User Email field – The email address of the user, used for login and system notifications.
- User Name field – The name of the user displayed in the application.
- User Type field – The type of user, such as internal user, external partner, or system user.
- Application Name field – The name of the application the user is associated with.
- Network Name field – The network the user is assigned to within the application.
- Link Name field – The name of the specific connection the user is associated with in the network.
- Roles field – The roles assigned to the user, which define their permissions and allowed actions.
- Business Team field – The team within the organization that the internal user is assigned to for managing access and visibility in the network.

Download a sample CSV file

7. Select Apply.

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The list of Network Members displays in the table.

Export network members

Export a CSV file of Network Members to review, edit, and re-import user details in bulk using a compatible format.

1. Select the Main Menu icon.
2. Select Administration.
3. Select Users from the left menu.
4. Select Network Members from the left menu.
5. Select the Export button on the top right corner of the screen.
6. Fill in a description in the Description field to identify the export activity.
7. Select Apply.

   A notification displays indicating that the export is queued. When ready, a second notification displays in the Notifications section in the top-right corner of the screen.

8. Select the Notification icon.
9. Select View details to open the Import/Export section in the OPUS Platform.
10. In the Export Details screen, select the file hyperlink to download the CSV file.

Reset a user's password or multi-factor authentication (MFA)

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System Administrators and Network and App Administrators can send users an email to reset their passwords.

1. Select the Main Menu icon.
2. Select Administration in the main menu.
3. Select Users from the left menu.
4. Select the Filter button.
5. In the Filters side panel, fill in the Email field to find the user.
6. Select Apply.

   The filtered results display in the table.
7. Select the user account from the results table.
8. Select the Reset button on the top right of the Company Users table.
9. In the Reset side panel, select Reset Password or Reset MFA from the Reset drop-down list.
10. Select Apply.

    TraceLink sends the user an email to reset their password or MFA.

Related Content



Add users

Users must be registered on the TraceLink Network in order to be assigned roles within apps, networks, and Links.

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