OPUS Administration: Part 3

Table of Contents

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Learning Objectives

At the end of this course, you will be able to:

- Identify common OPUS Administration troubleshooting scenarios
- Verify user access and resolve login issues
- Validate application availability and user role assignments
- Troubleshoot failed links by checking partner identifiers and configuration
- Diagnose and resolve Single Sign-On (SSO) issues
- Apply a structured approach to troubleshooting before making configuration changes
- Open a support case and provide the required information for resolution

Introduction

During day-to-day operations, companies may need to troubleshoot issues within OPUS. When issues occur, it can be difficult to know where to start.

This guide provides an overview of the basic areas to check first, helping identify common issues and guide the initial troubleshooting process within Administration.

Course prerequisites:

- Complete the **OPUS Administration Fundamentals** instructor-led training (ILT)
- Understand OPUS Administration navigation
- Be familiar with core concepts such as:
    - Users
    - Networks

    - Links
    - Applications
- Understand basic configuration tasks
- Have the required access to perform troubleshooting activities
- Have **Network and Apps Administrator** permissions
- Be assigned as a **Manager** or **Member** for application-specific tasks

This course assumes completion of the OPUS Administration Fundamentals instructor-led training (ILT). You should already be familiar with OPUS Administration navigation, core concepts such as users, networks, links, and applications, and basic configuration tasks.

You should also have appropriate access to perform troubleshooting activities. Most functions covered in this course require Network and Apps Administrator permissions. For application-specific tasks, you must be a Manager or Member of the relevant application.

Troubleshoot a problem: quick checklist

Complete this checklist before making configuration changes:

- **Confirm the user's role matches expected permissions**. The user's role determines what the user can view and perform. Many access issues are caused by role mismatches.
- **Read the exact error message**. Do not rely on the user's interpretation. The exact wording often points to the root cause.
- **Identify when the issue occurs**. Confirm whether the issue happens at login, during navigation, or while completing an action. This helps narrow the Administration area to check.
- **Check what changed**. If the process worked previously, review recent updates such as role changes, application enablement, or network configuration changes.

- **Test with another user and compare access**. If the same action works for another user, compare roles, permissions, and network access.
- **Review all possible causes before taking action**. Pause before making changes to avoid unnecessary configuration updates and repeat issues.

Error scenario 1: User Cannot Access OPUS

During daily operations, users might report that they cannot access OPUS. As an OPUS Administrator, first validate the user configuration before investigating more complex causes such as Single Sign-On (SSO) failures or system outages.

The key symptom includes the following:

- Access denied or unauthorized errors
- Account lock notifications
- Blank or incomplete dashboards after login

These issues are often caused by an inactive or disabled user account.

To troubleshoot the issue, search for the affected user in the Company Users administration area and verify that the account status is set to Active. If the account is inactive, update the status and save the changes. Review the assigned roles as part of the validation process and remove any incorrect roles if necessary.

After updating the account, request that the user log out and log back in. Confirm that the user can successfully access OPUS and that no additional access errors are displayed.

To update Company User account status

1. Log in to OPUS as Administrator.
2. Select **Administration** from the **Main Menu**.
3. In the side menu, select **Users** > **Company Users**.
4. Search for the user using their email address.
5. In the **Status** field, verify the current status. If the status is **Inactive**, click **Edit**.

6. Change the status to **Active**.
7. Click **Save**.

Tip: Most user access issues are caused by incorrect account configuration or inactive account status. Always verify user configuration before investigating SSO configuration or system availability issues.

Error scenario 2: Application Not Available

Users may report that a required application is not visible or accessible in OPUS. As an Administrator, begin by verifying access configuration rather than assuming a system issue.

Common symptoms include missing applications in the user interface, inability to access a specific application, or applications not appearing in the Applications or Navigation menu. These issues are commonly caused by missing application assignments, applications not enabled for the network, or missing user roles such as Manager or Member.

To troubleshoot the issue, verify the user's role assignments and confirm that the application is enabled for the appropriate network. Ensure the user is assigned to the application with the correct access level. Update the configuration if required and save the changes.

After updating access, confirm that the user can view and access the application successfully.

To Verify User Role and Application Access

1. Log in to OPUS with the affected user's credentials.
2. From the **Main Menu**, select **My Network**.
3. From the **Select your Network** list, select the required network.
4. Click **Go**.

5. Confirm that the **Manufacturing - Customer** feature is not accessible to the user. This confirms the issue is present and the fix is required.
6. Log out.

To resolve this issue

1. Log in to OPUS as Administrator.
2. Select **Administration** from the **Main Menu**.
3. In the side menu, select **Users** > **Network Members**.
4. Filter the following values:
   - **Network**: Select the Network or Application.
   - **Email ID**: Enter the affected user's email ID.
5. Click **Apply**.
6. Click the user hyperlink.
7. Click **Edit**.
8. Add the following roles:
   - **Manufacturing-Customer- Expanded**
   - **Manufacturing-Customer- Standard**
9. Click **Save**.

Validate

1. Log in to OPUS with the affected user’s credentials.
2. From the **Main Menu**, select **My Network** > **Select your Network** > **Go**.
3. Verify that the user can now access the **Manufacturing - Customer** feature.

Tip: Most application access issues are caused by missing roles or application assignments. Always verify user role and network configuration before investigating further.

Error scenario 3: Failed Link

This scenario occurs when a Link cannot be created successfully and the Link status displays as Failed. One common cause of this issue is an invalid administrator email address used during Link creation.

The key symptom is the following error message:

- The administrator email could not be resolved to an existing user.

This error indicates that the email address entered does not match an existing active user in OPUS. The issue can occur because of spelling errors, incorrect email domains, formatting issues, or inactive user accounts.

Another possible cause of Link failure is an incorrect Global ID in Master Data. Verify that the Global ID is accurate and correctly associated with the partner. If the identifier is missing or incorrect, update the Global ID before creating a new Link.

Failed links are typically caused by setup or configuration issues rather than system failures.

To view the failed Link

1. Select **Administration** from the **Main Menu**.
2. In the side menu, select **Links** > **Failed Links**.
3. Verify that a failed Link is displayed.
4. Review the error message:
    - **The administrator email could not be resolved to an existing user.**

To resolve this issue

1. Log in to OPUS as an Administrator by using a general account.
2. Select **Administration** from the **Main Menu**.
3. In the side menu, select **Links** > **Network Links**.
4. Click **New**.
5. Enter the correct email address in all required fields.
6. Verify the following:
   - The email address belongs to an existing and active user in OPUS
   - There are no spelling errors, incorrect domains, or formatting issues
7. Click **Save**.

   The new Link is created successfully.

Validate

1. Select **Administration** from the **Main Menu**.
2. In the side menu, select **Links** > **Network Links**.
3. Confirm that the new Link is created successfully.

Tip: Failed links are commonly caused by invalid email addresses or incorrect Global IDs. Always verify user information and Master Data configuration before creating a new Link.

Error scenario 4: Single Sign-On Failure

This scenario occurs when a user cannot log in to OPUS by using Single Sign-On (SSO). As an Administrator, first verify the SSO configuration and user setup before assuming a system issue.

Common symptoms include login failures, redirect loops, authentication errors, or access denied messages during the SSO login process. These issues are typically caused by incomplete SSO configuration, incorrect user setup, or mismatched user information between OPUS and the identity provider.

Before troubleshooting further, confirm that the SSO configuration is complete and that the user details in OPUS match the information configured in the identity provider.

To troubleshoot Single Sign-On (SSO) failure

1. Select **Administration** from the **Main Menu**.
2. In the side menu, select **Single Sign-on Settings** > **Sign-on Settings**.
3. Verify the SSO configuration:
   - Confirm that the correct authentication method is configured.
   - Verify that all required configuration details are complete and accurate.
4. Verify the user setup:
   - Navigate to **Users** > **Company Users**
   - Search for the affected user.
   - Confirm that the user account status is **Active**.
   - Verify that the user details match the identity provider configuration.
5. Update the SSO configuration or user details if required and click **Save**.

Validate

1. Request that the user log in again by using SSO.
2. Confirm that the user can successfully access OPUS.
3. Verify that no authentication or redirect errors are displayed.

Tip: Most SSO login issues are caused by mismatched user information or incomplete SSO configuration. Always verify user details and authentication settings before escalating the issue as a system outage.

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., Company 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