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NETWORK FOR GREATER GOOD

# OPUS Administration: Part 1

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# Getting started with OPUS Administration

## Learning Objectives

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

- Explain the purpose of the **Administration application** on the OPUS Platform.
- Describe the key components of the **TraceLink Digital Twin**.
- Identify the main areas of the **Administration user interface**.
- Navigate to Administration and access key sections such as **Company Users, Network Members, Networks and Apps, and Network Links**.
- Create and manage **Process Networks**.
- Apply **Company Solutions** to networks.
- Establish **Links with supply chain partners**.
- Add and manage **company users** and assign them to networks with appropriate roles.
- Create **Business Teams** and assign users and partner Links.
- Differentiate between **System Administrator and Networks and Apps Administrator roles** and understand their responsibilities.

## Introduction

The Administration menu item allows companies to set up and manage their configuration on the OPUS Platform. Through Administration, authorized users control how Apps, Solutions, Networks, and Links function for their company on the TraceLink Network.

Administration connects the core building blocks of the platform:

**Networks**: The collaboration space.

**Solutions**: The user interface (UI) and user experience.

By configuring these components, administrators define what users can **see**, **access**, and **do** when they log in to the platform.

## Managing Your Digital Twin

One of the key components of the TraceLink Network is the Digital Twin. A Digital Twin is a digital representation of your company on the TraceLink Network. It includes your company profile, locations, and the global identifiers associated with your organization. Administration enables you to manage your Digital Twin and model your supply chain network digitally.

The structure of a Digital Twin includes the following components:

- **Process Networks**: Process networks create shared digital workspaces where companies orchestrate business processes such as **logistics**, **manufacturing**, **commerce**, and **clinical operations**.
- **Partners and Links**: Partners are the supply chain organizations that collaborate with your company. You expand your process network by establishing Links with partners.
- **Users**: Users represent individuals within your company who interact with the platform. Administrators define user access based on each user's role in business processes and relationships with partners.

  Together, these components represent your company's digital presence and operational structure on the TraceLink Network.

### To navigate to Administration

1. Select **Administration** from the **Main Menu**.
2. Click **Users** > **Company Users** or **Network Members**.

   These sections allow administrators to manage users and assign them to networks.
3. Click **Network and Apps** > **Network and Apps**.

This section allows administrators to create and manage process networks and applications.

4. Click **Links** > **Network Links**.

   In this section, administrators establish Links with supply chain partners.

## Network and Apps Management

Network and Apps management allows administrators to configure applications and networks that support business processes.

**Application**: An Application provides the functionality required to perform business processes. Applications contain the APIs and logic used to exchange and process supply chain data.

**Network**: A Network is the collaboration environment where companies interact with partners while using an application. Effective network management ensures seamless communication, data exchange, and collaboration across the supply chain.

### Enterprise vs Multienterprise Applications

**Enterprise Application**: An Enterprise Application operates within a single organization. It supports internal business operations and is typically designed for internal workflows.

For example, SNM (Serial Number Exchange) is an enterprise application that enables companies to manage serial numbers and related processes within a single organization.

**Multienterprise Application**: A Multienterprise Application operates across multiple organizations. It allows companies to exchange information and collaborate with supply chain partners. Multienterprise applications are essential for supply chain collaboration.

For example, MINT (Multienterprise Information Network Tower) is a multienterprise application that allows companies to exchange supply chain data with partners.

### Why Use Multiple Networks?

Organizations may create multiple networks for a single application based on different business processes.

For example:

- Manufacturing operations may involve **contract manufacturers (CMOs)**.
- Logistics operations may involve **third-party logistics providers (3PLs)**.

  These groups may require different partners, users, and workflows.

Process networks allow organizations to separate these operations into different networks, such as **MINT for Manufacturing** and **MINT for Logistics**.

### To create a New Network

1. Select **Administration** from the **Main Menu**.
2. In the side menu, select **Networks and Apps**.
3. Click **New**.
4. Fill in the required fields in the **Network Information** section.
5. Click **New** from the Operations toolbar.
6. In the Network Information section, fill in the following fields:
   - **Application**: Select the Application from the drop-down list. For example, Multienterprise Information Network Tower (MINT).
   - **Network Name**: Enter a Network name.
   - **Network Description** (Optional)
7. In the Solution section, the Standard Solution switch is set to **Yes** by default, indicating a standard solution is applied to the network.

   **Note**: To apply a configured company solution, set the Standard Solution switch to **No**, then select the desired solution from the Company Solution drop-down list.
8. Click **Save**.

   The new network is added and displays as an option when establishing Links.

## Managing a Network

A **Company Solution** is used when a company needs functionality that goes beyond the standard application behavior.

For example, a company may require invoices to be **paused for manual review** before sending them to an ERP system.

Each **Company Solution** is linked to a single **Process Network**, creating a **one-to-one relationship**. Organizations can create multiple networks with different solutions to support different operational requirements. When a network uses a **Company Solution**, it does **not automatically receive updates** from future standard application releases.

### To apply Company Solution to a Network

1. Select **Administration** from the **Main Menu**.
2. In the side menu, select **Networks and Apps**.
3. Click **Filter** to narrow down the list of available Networks and Apps.

   Example: Multienterprise Information Network Tower (MINT).
4. In the Filters panel, select the desired application from the drop-down list.
5. Click **Apply**.
6. In the search results, select the hyperlink for your desired network.

   Example: External Manufacturing.
7. Click **Edit**.
8. In the **Solution section**, the **Standard Solution** switch is set to **Yes** by default.
9. To apply a company solution, set **Standard Solution** to **No**.
10. Select the desired solution from the **Company Solution** drop-down list.
11. Click **Save**.

    The selected **Company Solution** is now applied to the network.

# Administrator Roles in OPUS

Administrative roles control access to configuration and management functions in the OPUS Platform and enable users to manage system settings, networks, and applications. Use these roles to configure apps, manage networks, and assign roles to users.

Two primary administrator roles are available in OPUS:

- **System Administrator**
- **Networks and Apps Administrator**

## System Administrator Role

The System Administrator role has full access to administration functions across the platform. System Administrators can manage configuration for any application or network and assign roles to other users. This role functions as a super administrator for the OPUS Platform.

Responsibilities include:

- Manage system-level configuration
- Configure networks and applications
- Assign roles to users
- Manage administrative settings across the platform

The System Administrator role is similar to the Company Administrator role in TraceLink Track and Trace Services (TTS). However, System Administrators in OPUS have broader permissions because they can assign any role to users.

## Networks and Apps Administrator Role

The Networks and Apps Administrator role provides administrative access to specific applications. Users with this role can perform administrative tasks for the applications they manage.

Responsibilities include:

- Manage administrative settings for assigned applications
- Configure application-specific administration functions
- Support application configuration within a network

This role is similar to the Application Manager role in TTS. However, unlike Application Managers in TTS, Networks and Apps Administrators do not have access to the application itself. Their permissions are limited to administration tasks.

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### To assign Admin roles

1. Select **Administration** from the Main Menu.
2. In the side menu, select **Users** > **Network Members**.
3. Click **New**.
4. Select **Internal**, in the **User Type** drop-down.
5. Select a user or start typing the user’s name to display matching suggestions, in the **User Name** drop-down.
6. Select **Administration**, in the **Application** drop-down.
7. Select **System Administrator**, in the **Roles** dropdown.
8. Click **Save**.

   The user now has full access to the Administration app.

## Linking Partners

Linking connects your company with supply chain partners on the TraceLink Network. When you create a Link, TraceLink confirms the digital address of your partner's digital twin and adds it to your company's network. If your partner's identifiers are not on the network, the TraceLink Network Operations team verifies and registers them. The Link represents the relationship that allows companies to exchange data through the application. Linking also enables a shared, secure workspace between your company and your partner. When establishing a Link, the application owner assigns roles that determine what actions the partner's users can perform.

Best practice guidelines:

- Link **OPUS multinetwork apps** through OPUS.
- For apps available on both **TTS** and **OPUS**, linking is typically done through TTS.
- Apps available only on **TTS** must be linked through TTS.

### To establish Partner Links

Establish a Link to connect your company with a partner on the TraceLink Network and enable data exchange within the selected application and network.

1. Select **Administration** from the **Main Menu**.
2. In the side menu, select **Links** > **Network Links**.
3. Click **New**.
4. In the **Network** section, fill in the following fields:
   - **Application**: Select the application from the drop-down list.
   - **Network**: Select the network from the drop-down list.
5. In the **Entity to Link** section, fill in the following fields:

- **Entity**: Select the partner or internal location from the list. Best practice: Select an entity with a global identifier such as SGLN or GLN.
- **Send Notification To** (Optional): Enter an email address to notify the partner that the link has been created.
- **Identifier Type** (Optional): Select the identifier type used to link this Partner or internal location to the app or network. The value is sourced from the Partners and Locations configured in Master Data.
- **Identifier Value** (Optional): Enter the entity ID associated with the selected identifier type to link this Partner or internal location to the app or network. The value is sourced from the Partners and Locations configured in Master Data.

6. In the **Roles** section, fill in the following field:
   - **Roles**: Select the roles that the administrator at the linked entity can assign to their users.
7. To add additional roles, click the **Add** + button.
8. To remove roles, click the **Remove** - button.
9. Click **Save**.

   The Link is created, enabling your company and the partner to exchange data within the application network.

## User Management

If a team member has not yet been added to TraceLink, administrators must first create the user as a Company User. Once the user is created, administrators assign the user to a specific Process Network through Network Members. Users are considered Network Objects, which means a user created in OPUS is also visible in TTS.

### To add Company Users

Add a company user to create a user account and send an invitation to join the TraceLink Network.

1. Select **Administration** from the **Main Menu**.
2. In the side menu, select **Users** > **Company Users**.
3. Click **New**.

   The **New Company Users** screen appears.
4. Enter the following fields:
   - **First name** field - Enter the user's first name.
   - **Last name** field - Enter the user's last name.
   - **Email Address** field - Enter the user's email address.
5. Click **Save** to add the user.
6. To add multiple users, click **Save and New**.

   The company user is added, and the system sends an **email invitation** to the new user.

### To bulk add Company Users

Add a company users in bulk to create a users account and send an invitation to join the TraceLink Network.

1. In the **Search Company Users** field, select **Import**.
2. In the Import panel, drag and drop the CSV file or select the browse link to search for the file.

The following field columns are required in the CSV file.

- Email – The email address of the user, used for login and system notifications.
- First Name – The first name of the user.
- Last Name – The last name of the user.

3. Click **Apply**.

The list of Company Users displays in the table.

**To bulk export Company Users**

Export the company users in bulk to review, edit, and re-import user details in bulk.

1. In the **Search Company Users** field, select **Export**.
2. Type the desired **Activity Name**.
3. Select the desired output format to from the drop-down.
    - Detailed File Format
    - Import-Compatible File Format
4. Click **Apply**.
5. Click **Notifications** icon.
6. In the notification panel, select **View details** to open the **Import/Export** section in the OPUS Platform.
7. In the **Export Details** screen, select the file hyperlink to download the **CSV** file.

## Business Teams

In the Administration application, Business Teams are structured groups used to manage specific business processes. Business teams help administrators organize users and partners so that the right users access the right data.

**Example:**

Suppose your company works with suppliers across multiple countries. A specific group of users may need to work only with suppliers located in the United States.

To support this scenario:

1. Create a **Business Team for the US region**.
2. Assign **US supplier links** to the Business Team.
3. Add relevant users to the Business Team.

Users assigned to this team will see only **US supplier data**, while supplier information from other regions remains hidden. This approach enhances data security and ensures users access only relevant data.

Follow the steps below to configure users and Business Teams for this scenario:

### Step 1: Assign a User to a network

1. Select **Administration** from the **Main Menu**.
2. In the side menu, select **Users** > **Network Members**.
3. Click **New**.
4. In the **User Type** drop-down, select **Internal**.
5. In the **User Name** drop-down menu, select a user or start typing the user's name to display matching suggestions.
6. Under **Network Information**, select the desired Application and network.
7. From the **Roles** drop-down, select the appropriate role for the user.

8. To add more roles, click the **Add** button.

9. Click **Save**.

   The user is assigned to the selected application and network with the specified roles.

As you can import and export company users, you can also import and export network members in bulk.

**To bulk add Users to network**

Add the users in bulk to the network.

1. In the **Search Network Members** field, select **Import**.

2. In the Import panel, drag and drop the CSV file or select the browse link to search for the file.

The following field columns are required in the CSV file.

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

- Business Team – The team within the organization that the internal user is assigned to for managing access and visibility in the network.

3. Click **Apply**.

The list of Network Members displays in the table.

**To bulk export Network Members**

Export the network members in bulk to review, edit, and re-import user details in bulk.

1. In the **Search Company Users** field, select **Export**.
2. Type the description to identify the **Export Activity**.
3. Click **Apply**.
4. Click **Notification** icon.
5. In the notification panel, select **View details** to open the **Import/Export** section in the OPUS Platform.
6. In the **Export Details** screen, select the file hyperlink to download the **CSV** file.

## Step 2: Create a Business Team

Create a Business Team to organize users and partner Links within a specific application and network, enabling controlled access to relevant data and business processes.

1. Select **Administration** from the **Main Menu**.
2. In the side menu, select **Links** > **Business Teams**.
3. Click **New**.
4. In the **Name** field, enter a meaningful name to distinguish the Team.
5. In the **Description** field, enter details that describes the business team.
6. In the **Application** drop-down, select the app that the business team must be linked to.
7. In the **Network** drop-down, select the network the business team must be linked to.

8. Click **Save**.

   The new business team is created within a network for the specific app. The Link section is displayed after saving the details.

9. Click **Edit**.

10. In the Links section, select the **Add** icon to link a new network to the business team.

    The business team is created and linked to the selected application and network, allowing administrators to associate Links and users with the team.

## Step 3: Add a Network Member to a Business Team

Add a network member to a Business Team to allow the user to participate in the team's processes and access the associated partner Links and data.

1. Select **Administration** from the **Main Menu**.
2. In the side menu, select **Users** > **Network Members**.
3. In the **Filter** column, select **Application**.
4. Click **Apply**.
5. Click on the **Name** link [ Select internal user. Currently only Internal users can be added to Business Team ].
6. Click **Edit**.
7. In the **Business Team** section, select the **Add** button to add member to the business team.
8. Select the Business Team.
9. Click **Save**.

   The network member is added to the selected Business Team and can now access the team's associated Links and data.