TRACELINK UNIVERSITY

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TraceLink University

Add users

Users must be registered on the TraceLink Network in order to be assigned roles within apps, networks, and Links. Administrators can assign users from their own company networks, or Links. System Administrators 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.

To add users for native Opus Platform networks (e.g. Agile Process Teams), select the Networks tab, and to add users to Track & Trace (TTS) networks that are available in the Opus UI (e.g. US Compliance), select the Apps tab. To give users access to other TTS apps, go to the TTS UI.

Access to assigning users and roles

System Administrators can add users and assign roles for any user or role within the company. System Administrators and Application Administrators must assign users to roles directly within the specific app, network, or Link.

Add a new user to the company

In the current release, a System Administrator for Track & Trace Services (TTS) must add the user to the company in TTS Company 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 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.

Assign users to networks and Links

Assign a user to a specific network

System Administrators and Application Administrators can add an existing or new user to a network that they administer and assign roles to those users so that the they can access networks and Links.

1. Select Administration in the main menu.
2. Select Networks.
3. Select the Networks tab to view the networks for native Opus apps (e.g. Agile Process Teams).
4. Filter to find the network.
5. Select the Action ⋮ icon in the row for the network.
6. Select Assign to Network.
7. Select the Internal User tab in the dialog box to assign a user in your company to a network, or the External User in the dialog box to assign a user who is not in your company to a network.
8. Select the Assign User to Network ⊕ icon.
9. Fill in one or more of the following fields to filter the results:
    - Network – The network that the role is for.
    - User field – Conditionally required if the user is an Internal User. The user assigned to the role. The User field does not appear when adding an External User.
    - Email Address field – Conditionally required if the user is an External

User. The email address of the user to add. The Email Address field does not appear when adding an Internal User.

- Team drop-down – Conditionally required if the user is an External User. The Link to assign the user to. If the Link is not specified to an Internal User, the user is added directly to the network.

  Select your company's name instead of a specific Link to assign the user to the app or its network directly, so the user has access to all Links within the app or its network.

- Role drop-down – Required. The role to assign to the new user. Select the Add icon to add another Role drop-down.

10. Select Assign.

    The existing user is assigned to a network that they administer.

Assign a user to a specific Link

Users must already be added to the company before they can be added to a Link. A Company Administrator can add users to the company in Track & Trace Services Company Administration.

System Administrators and Application Administrators can assign an existing user to a Link that they administer.

1. Select Administration in the main menu.
2. Select Links.
3. Select the tab for the type of Link:
    - Mutli-Network tab – View the Links for native Opus apps (e.g. Agile Process Teams)
    - Single-Network tab – View the Links for Track & Trace Services (TTS) apps that are available in the Opus UI (e.g. US Compliance)

- Failed tab – Review the Links that could not be established

4. Filter to find the Link.
5. Select the Action ⋮ icon in the row for the Link.
6. Select View Link.
7. Select the Users tab.
8. Select the Assign User to Network ⊕ icon.
9. If the user is already registered on the TraceLink Network when assigning a user to a Link, expand the Existing Internal User section, and fill in the following fields:
   a. User field – Required. The user registered on the TraceLink Network that is a member of your company.
   b. Role drop-down – Required. The role to assign to the user.
10. Select a User to assign to the Link.

    Select the Add ⊕ icon to add another User drop-down.

11. Select Assign.

    The existing user is assigned to a Link that they administer.

Assign any role to a user

System Administrators and Application Administrators assign roles to users that control the actions those users can perform for apps, networks, and Links that their company has access to.

Without filtering for the user

1. Select Administration in the main menu.
2. Select Users.
3. Select the tab for the type of User:
   - Networks tab – Add users for native Opus Platform networks (e.g. Agile

Process Teams)
    - Apps tab – Add users for Track and Trace Services (TTS) apps that are available in the Opus UI (e.g. US Compliance)
    - All tab – Assign a user
4. Select the Add User icon.
5. Expand the Add User to Network section, and fill in the following fields:
    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. Network drop-down – Required. The network to assign the user to.
    c. Team drop-down – Conditionally required if the user is an External User. The Link to assign the user to.
    d. Role drop-down – Required. The role to assign to the user.
6. Select Add.

   If the user is not assigned any roles, the user can log in to TraceLink but cannot access any networks or Links.

By filtering for a user

System Administrators and Application Administrators can add an existing user to a network that they administer and assign roles to those users so that they can access networks and Links.

1. Select Administration in the main menu.
2. Select Users.
3. Filter to find the network.
4. Select the Action icon in the row for the user.
5. Select Assign to Network.
6. If the user is already registered on the TraceLink Network, fill in the following fields in the Registered TraceLink User section:

   a. Name drop-down – Required. The first and last name of the user to assign. The user must not already be registered on the TraceLink Network as a member of another company. This field is prepopulated.
   b. Network drop-down – Required. The network to assign the user to.
   c. Team drop-down – Optional.The Link to assign the user to.
   d. Role drop-down – Required. The role to assign to the user.

      Select the Add icon to add another Role drop-down.

7. Select Assign.

   Select Assign Another to assign another user to a network.

While viewing the user's profile

1. Select Administration in the main menu.
2. Select Users.
3. Select the tab for the type of User:
   - Networks tab – Add users for native Opus Platform networks (e.g. Agile Process Teams)
   - Apps tab – Add users for Track and Trace Services (TTS) apps that are available in the Opus UI (e.g. US Compliance)
   - All tab – Assign a user
4. Filter to find the user.
5. Select the Action icon in the row for the user.
6. Select View Profile.

   Select Manage Roles to change the roles assigned to the user directly. The available roles displayed are based on the networks or Links that the user is already a member of.
7. In the User Roles section:

a. Select the Assign Roles icon.

b. Enter a role or network name in the Keywords field to filter for specific roles (optional).

c. Select one or more [Role Name] checkboxes to assign to the user.
d. Select Assign.

The users are assigned the specific roles within the network and team selected.

Application Administrator role

System Administrators can assign the System Administrator and Application Administrator to users in their company. The Application Administrator role only has permission to perform Administration tasks for the Applications and Networks that a System Administrator has given them permission to.

1. Select Administration in the main menu.
2. Select Users.
3. Filter to find the user.
4. Select the Action icon in the row for the user.
5. Select Assign External User to Administrator Role.
6. Fill in the following fields in the Assign External User to Administrator Role section:
    a. Name drop-down – Required. The first and last name of the user to assign. The Name drop-down is pre-filled with the name of the selected user.
    b. Administrator Role drop-down – Required. The role to assign to the user.
    c. Network drop-down – Optional. The network to assign the user to.

    Select the Add icon to add another Network drop-down.

   d. Team drop-down – Conditionally required if the user is an External User. The Link to assign the user to.

      Select your company's name instead of a specific Link to assign the user to the app or its network directly, so the user has access to all Links within the app or its network.

7. Select Assign.

Assign roles to my company users

System Administrators can assign roles to my company users.

1. Select Administration in the main menu.
2. Select Users.
3. Select the All tab to assign a user.
4. Select the Action icon in the row for the user.
5. Select View Profile.
6. Select a role. The available roles displayed are based on the networks or Links that the user is already a member of.
7. Select Submit.

   The user is assigned to the role.

Export user data

System Administrators can export a CSV file with user data from the All tab in the Export User section including the account status and user role information.

1. Select Administration in the main menu.
2. Select Users.
3. Select the All tab.
4. Select the Export icon to export the user data.

   TraceLink asynchronously generates the CSV file. The file will be exported, downloaded, and available to be opened locally in your notifications when it is ready. From the Notifications panel, view the date that the export file was created.

5. Select the View Details link.

   The file downloads.

See the columns that display in the user data CSV file

The element headers below are all required in the CSV file, in order, and separated by commas. The data in the individual cells can be empty.

- Name field – The first and last name of the user.
- Email field – The email address of the user.
- **Account Status** – The status of the account (i.e. active or inactive).
  - Active – The user has activated their account and can log in to TraceLink.
  - Inactive – The user has been deactivated.
- Last Login – The date and time of the user's last successful login.
- Password Expiration – The date and time when the user's password expires.
- **Administrator** – The user is an Administrator and has Company Administration Roles which gives them access to Administration Experience Task app.
  - Yes – The user has the role of Administrator.
  - No – The user does not have the role of Administrator.
- **System Administrator** – The user role is a System Administrator.
  - Yes – The user has the role of System Administrator.
  - No – The user does not have the role of System Administrator.
- **Application Administrator** – The user role is an Application Administrator.
  - Yes – The user has the role of Application Administrator.
  - No – The user does not have the role of Application Administrator.
- **Administer Networks** – Conditionality required if the user is an Application

Administrator. The apps that the user is the Application Administrator for.
- Roles – The apps that the user has access to.

Manage user accounts

Reset a user's password

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

1. Select Administration in the main menu.
2. Select Users.
3. Select the All tab to assign a user.
4. Filter to find the user.
5. Select the Action ⋮ icon in the row for the user.
6. Select Reset Password.

   TraceLink sends the user an email to reset their password.

Unlock a user

System Administrators can unlock accounts for users who have locked themselves out of their account on the Opus Platform. Users could lock their account after exceeding the number of allowed login attempts. System Administrators can also remove user access to the platform by deactivating a user's account.

1. Select Administration in the main menu.
2. Select Users.
3. Select the All tab to assign a user.
4. Filter to find the user.
5. Select the Action ⋮ icon in the row for the user.
6. Select View Profile.
7. In the Login Information section:
   a. Select the Edit icon.

   b. Set the Account State switch to Unlocked.
   c. Select the Save icon.

      The user's account is unlocked. When an account is unlocked, access to the Opus Platform is restored.

Activate a user's account

System Administrators can activate a user's locked or unlocked accounts so they can log in to TraceLink.

1. Select Administration in the main menu.
2. Select Users.
3. Select the All tab to assign a user.
4. Filter to find the user.
5. Select the Action icon in the row for the user.
6. Select View Profile.
7. In the Account Information section:
   a. Select the Edit icon.
   b. Set the Status switch to Active.
   c. Select the Save icon.

      The user is activated and can access all TraceLink apps.

Tips

- Users can also be activated by selecting Activate in the Action menu, but activating the user from the View User Profile screen allows System Administrators to check which apps, networks, or Links the user has access to before activating.

Configure user account settings

System Administrators can configure user session timeouts and password settings.

1. Select Administration in the main menu.
2. Select Users.
3. Select the Configure SSO Settings tab.
4. Fill in one or more of the following fields in the Failed Login Attempts section:
    a. Login Attempts Allowed drop-down – Required. The account locks after a specified number of failed consecutive login attempts. Default is 5 consecutive failed attempts.
    b. Unlock account after specific number of minutes checkbox – Indicates whether to unlock the account after a specified number of minutes. If not selected, users who are locked out must reset their password. The checkbox is selected by default.
        - Login Attempts Allowed field – Conditionally required if the Unlock account after a specific number of minutes checkbox is selected. Select the time in minutes after which an account is unlocked. Default is 16 minutes.
5. Select a Password Expiration radio button:

    a. Password Never Expires radio button – Indicates whether the password never expires. This radio button is selected by default.

    b. Password Expires radio button – Indicates whether the password expires. If selected, specify the number of days the password expires after:

        - Expires After field – Conditionally required if the Password Expires radio button is selected. 8 character minimum and 480 character maximum.

6. Select a Password Reuse radio button:

   a. Previous Passwords Allowed radio button – Indicates whether all previous passwords can be used again. All previous passwords are allowed by default.

   b. Cannot Reuse Specified Number of Previous Passwords radio button – Indicates whether a previous password cannot be used again.

      - Number of Previous Passwords that Cannot be Reused field – Conditionally required if the Cannot Reuse Specified Number of Previous Passwords radio button is selected. The number of passwords that cannot be used. Default is 30 passwords that cannot be reused.

7. Select the Save icon.

Deactivate a user's account

System Administrators can deactivate a user's locked or unlocked accounts. When an account is deactivated, user’s can no longer log in to TraceLink.

1. Select Administration in the main menu.
2. Select Users.
3. Select the All tab to assign a user.
4. Filter to find the user.
5. Select the Action icon in the row for the user.
6. Select View Profile.
7. In the Account Information section:
   a. Select the Edit icon.
   b. Set the Status switch to Inactive.
   c. Select the Save icon.

The user is deactivated and all access to TraceLink apps is removed.

Tips

- Users can also be deactivated by selecting Deactivate in the Action menu, but deactivating the user from the View User Profile screen allows System Administrators to check which apps, networks, or Links the user has access to before deactivating.

Filter and view users

Filter and view users

1. Select Administration in the main menu.
2. Select Users.
3. Select the tab for the type of User:
4. Select the tab for the type of User:
    - Networks tab – Add users for native Opus Platform networks (e.g. Agile Process Teams)
    - Apps tab – Add users for Track and Trace Services (TTS) apps that are available in the Opus UI (e.g. US Compliance)
    - All tab – Assign a user
5. Fill in one or more of the following fields to filter the results:
    - Name multi-select field – The user's first or last name.
    - Role multi-select field – The role assigned to a user.
    - Network multi-select field – The network that the user belongs to.
6. Select Show Additional Filters and fill in one or more of the following fields to further filter the results:
    - Permissions drop-down – The type of permissions granted to the user based on their assigned roles:
        - Experience Task Permissions – Permissions developed for the app

that determine the side menu items that display for users.
        - Action Permissions – Permissions developed for the app that determine the functionality available to users.
        - Custom Permissions – Custom permissions that are added to an app's solution by a Solution Developer.

    - Status drop-down – The status of the user:

        - All
        - Active – The user has activated their account and can log in to TraceLink.
        - Inactive – The user has been deactivated.
        - Pending – The user has been added to the company but has not yet activated their account.

7. Select Apply.

   The filtered results display in the table.

View account and login information

System Administrators can view login information to identify the last time a user logged into the Opus Platform or any failed login attempts. The login information also includes the date when a user last changed their password and when that password expires.

1. Select Administration in the main menu.
2. Select Users.
3. Select the All tab to assign a user.
4. Filter to find the user.
5. Select the Action ⋮ icon in the row for the user.
6. Select View Profile.

   The View Profile screen displays the account and login information.

See the information that displays

In the Account Information section:

- Name field – The first and last name of the user.
- Email field – The email address of the user.
- Status field – The status of the user:
  - Active – The user has activated their account and can log in to TraceLink.
  - Inactive – The user has been deactivated.

In the Login Information section:

- Account State – The account is locked or unlocked.
- Last Login – Date and time of the user's last successful login.
- Failed Login Attempts – The number of failed login attempts for the user. The number resets after the user logs in successfully.
- Password Last Changed – Date and time when the user last changed the password.
- Password Expiration – Date and time when the user's password expires.

In the User Roles section:

- Network – The network the user is assigned to.
- Team – The Link the user is assigned to.
- Roles – The role the user is assigned to

In the Administered Networks section:

- Network – The network the user is assigned to.
- Network Owner – A TraceLink Member who has purchased a particular TraceLink app.

Select the Add ⊕ icon to assign another user with the Application Admin role.

The filtered results display in the table.

Related Content

Add B2B connections

Application Administrators can create and update Opus B2B connections using AS2, SFTP, and SMTP protocols.
View More

View B2B messages

Application Administrators and members with standard access can filter and view the B2B messages for AS2 , SFTP and SMTP connection types.
View More

Configure TraceLink for Multienterprise Information Network Tower

Unlike other Opus apps, Multienterprise Information Network Tower must be configured on Track & Trace Services because Multienterprise Information Network Tower supports asynchronous messages, which are not yet available on the Opus Platform.
View More