

Linking Partners to Your POET Network

You link your Partners to your Process Orchestration for Empowered Teams Process Network in order to exchange data with them and provide them with a shared view of that data. When you link a Partner, you provide administrators at their company with roles to assign to their users.

Select the **Partner Member - Compliance Exception Access** role so your Partners can access the Compliance Exceptions. For more information on roles in POET, see the Online Help.

This sections includes:

- Linking to a single partner.
- Bulk linking to many partners.

Note: Before you link your partner, the partner must be in Partner Master Data.



To Link a Partner

1. Log in to *opus.tracelink.com*.
2. Select **Administration** from the **Main Menu** ☰.
3. In the side menu, select **Links**.
4. Click **+** to add a Link.
5. For **Application**, select **Process Orchestration for Empowered Teams**.
6. Select a **Network**.

Note that the name of the network is defined by the company.

7. Select the **Entity** you wish to link to. The entity must exist in Master Data to appear in the list.

Note: If you wish to link at the location level of your Partner's company, you must use a TraceLink ID for the specific location. Contact your Partner to obtain the ID.

8. (Optional) If you want to notify someone at the partner company, enter a value in the **Send Notification To** field.
9. Click **Next**.
10. Select the roles available for an administrator at the partner company to assign to their users.
11. Click **Link**.



To Link in Bulk

1. Select **Administration** from the **Main Menu** ☰.
2. In the side menu, select **Links**.
3. On the **Multi-Network** tab, click the upload icon 📄.
4. For **Application**, select **Process Orchestration for Empowered Teams**.
5. Select a **Network**.

Note that the name of the network is defined by the company.

6. For **Role**, select a role that will be available for an administrator at the partner company to assign to their users.

Click the add icon ➕ to add more roles.

7. Click the [LinksSample.csv](#) link to download the CSV template.
8. In the CSV template, remove the sample line and enter the columns as follows:
 - **entityType** - Enter the identifier type (for example, GLN or SGLN).
 - **entityId** - Enter the identifier value.
 - **email** - Leave blank.

Tip: Download the data from **Master Data > Partners**. Swap the first two columns (so the Primary Identifier Type is first and the Primary Identifier Value is second). Copy the first two columns and paste into the LinksSample.csv template. Remove duplicate rows or any Partners you do not wish to link.

9. Save the file.
10. Drag and drop the file in the panel.
11. Click **Import**.