Onboarding a Partner for POET

In order to exchange data with your Partners, you need to:

- Link to the Partner.

  To link to a Partner, the Partner must already exist in Partner Master 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.

- Give users at your company access to the Process Network (the shared workspace).

  To give a user access to a Process Network, the user must already be in TraceLink.

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 Assign Access to Users in Your Company via the Network tab

To perform these steps you must be either an Application Administrator or a System Administrator.

1. Log in to *opus.tracelink.com.*
2. Select **Administration** from the **Main Menu** .
3. In the side menu, select **Users**.
4. Select the **Networks** tab.
5. Select an **Application - Network (Owner)**.

   Note that this includes Networks to which you are linked as well as the Networks you own.
6. Click **Apply**.
7. Click the add icon .
8. In the **Internal User** section, select a **User**.
9. Select a **Team**, if you wish. If you do not specify a **Team**, the user can access all Teams.
10. Select a **Role**.

    Roles provide access in the context of the Application. Click the add icon to give the user additional roles.
11. Click **Assign**.

To Assign Access for Users at your Linked Partner

If you have the email address of users at your Partner, you can add them to your POET Network so they can access compliance exceptions.

1. Log in to *opus.tracelink.com.*
2. Select **Administration** from the **Main Menu** .
3. In the side menu, select **Users.**
4. Select the **Networks** tab.
5. For **Application - Network (Owner)**, select the Process Orchestration for Empowered Teams application and network.
6. Click **Apply**.
7. Click the **Assign User to Network** icon.
8. In the panel, collapse the **Internal User** section and expand the **External User** section.
9. For **Team**, select your Partner.
10. Enter the **Email** of the user at your Partner.

    Important: Make sure the email address is for a user at the correct Partner. There is no validation to see if the user exists at the Partner company.

11. Select your **Team**.
12. Select a **Role**. For POET, select Partner Member - Compliance Exception Access.
13. Click **Assign**.

To Remove Access

1. In the appropriate tab of the **User** screen ("Networks" or "Apps"), find the user in the list, click the action icon in the right column and select **Remove**.
2. Click **Remove** in the pop-up box.

To Manage Roles for Existing Network Members

1. Log in to *opus.tracelink.com.*
2. Select **Administration** from the **Main Menu** .
3. In the side menu, select **Users**.
4. Select the **Networks** tab.
5. Select a **Application - Network (Owner)**.

   Note that this includes Networks to which you are linked as well as the Networks you own.
6. Click **Apply**.
7. Find the appropriate user in the list.
8. Click the action icon on the user's row and select **Manage Roles**.
9. In the side panel, a list of roles appears with check boxes next to them.
   - Select the check box next to a role you wish to add.
   - Clear a check box next to a role you wish to remove.
10. Click **Submit**.