ADMIN GUIDE

FOR REGIONAL AND SYSTEM ADMINS

INATrace

The Traceability Tool
for Sustainable Supply Chains

User guide 2024

INA

Sustainable Agricultural
Supply Chains Initiative

Trace

Table of Content

Chapter 1.

Introduction

About this guide

This Admin guide helps you with the first steps on how to set up INATrace after you successfully installed the system. If you need help installing the system, please refer to the existing GitHub documentation https://github.com/INATrace/fe/blob/main/README.md.

In order to set up INATrace, you need to configure the different parts of INATrace chronologically as shown in chapter 2 (system level, value chain level, company level, product level). In case one of these parts is not configured correctly, company users will not be able to use the system.

After completing these steps, you can onboard new users and link them to their respective companies (chapter 3).

You can also assist the companies in uploading Farmer lists as shown in chapter 4.

This guide is NOT a user guide and also does NOT include information on how to set up individual company configurations. Separate user guides are available for this.

Roles and permissions

	System Admin	Regional Admin	Company Admin	Company User
Can add elements on system level	Yes	Yes	No	No
Can edit / delete elements on system level	Yes	No	No	No
Can add elements on value chain level	Yes	Yes	No	No
Can edit / delete elements on a value chain level	Yes	No	No	No
Can create new companies	Yes	Yes	No	No
Can create new products	Yes	Yes	Yes	No
Can link companies to an existing product	Yes	Only companies they created / have been added to	No	No
Can activate new users	Yes	Yes	No	No
Can add users to a company	Yes	Only users they activated and only companies they created / have been added to	No	No

Chapter 2.

System configurations

This part of the system can only be fully modified by a system admin. In case you are a regional admin and have specific functions unavailable, please contact your system admin or support contact to request the necessary additions or edits.

2.1 Adding elements on system level

To add a new element on a system level or to edit it, navigate to the system settings as shown below. You can add / edit semi-products, measuring unit types, processing evidence types, processing evidence fields and products here. Note: You will need to add the elements you added also on a value chain level in a second step in order for the users to be able to access those in their company configuration.

Pay attention when adding the semi-products, to check the correct boxes as shown below. Also note that this section is only for semi-products (raw materials or semi-processed goods). Final products (packaged and branded products for end-customers) are added in the "products" section of the system by company users.

2.2 Adding elements on value chain level

To add a new element on a value chain level or to edit it, navigate to the value chain settings as shown below. You can add / edit semi-products, facility types, measuring unit types, processing evidence types and processing evidence fields for each value chain individually here. Note: all elements need to be added beforehand on a system level. Otherwise they will not be available on a value chain level.

[1]

[2]

[3a] Add new value chain

[3b] Edit existing value chain

2.3 Adding companies

To add a new company, navigate to the company settings as shown below and click 'new company'. You will need to provide basic information about the company you are adding. The company admin can later on edit and complete the company profile.

2.4 Adding products and linking companies (stakeholders)

To add a new product in the system follow the steps shown below. Note, that adding a product is a required step to link companies within the same supply chain. This allows them to use the "order" functionality in the system and share data related to a specific batch along the supply chain. A company that is not linked to any product, will not be able to use essential system functions like adding deliveries.

Navigate now under the products menu to the stakeholders submenu and add one or several companies working on the same product. Note that "producers" refers to producer organizations or companies which buy from farmers or collectors (intermediaries). Farmers and collectors are added by the producer organizations within their company profile.

In the lower part of the page, you will also be able to define one or several "Product admins". These are the companies that can edit the product settings, create QR labels for QR codes, and add final products. Mostly this role is taken over by the brand owner. Additionally, you can upload data sharing agreements that have been agreed on by the stakeholders.

Chapter 3.

Onboarding new users

3.1 Activate a new user

In order to activate a new user, navigate to the "system" settings as shown below. Click on "users" in the sub menu and filter for "Show confirmed email" and "Show unconfirmed" to find the new user who has registered on the platform beforehand.

In case the user is found under "unconfirmed email" you can confirm the email for them after checking that the email address is correct by clicking on "edit" and following the step shown below. If the user showed up under "confirmed email", you can skip this step.

Next: Filter for "Show confirmed email" and click "activate" for the user you would like to activate. Afterwards, you will have to "add" the new user to their company profile as shown in the next chapter.

3.2 Add a new user to a company

Within the system menu, navigate to "companies", find the company you want to add the user to and click "Edit".

Click "Add new" and select the user by start typing their name in the field "User". Once selected, you need to choose a role for this user. Select "company user" for a person without rights to edit the company configuration and "company admin" for a person who holds these right. Click "Save".
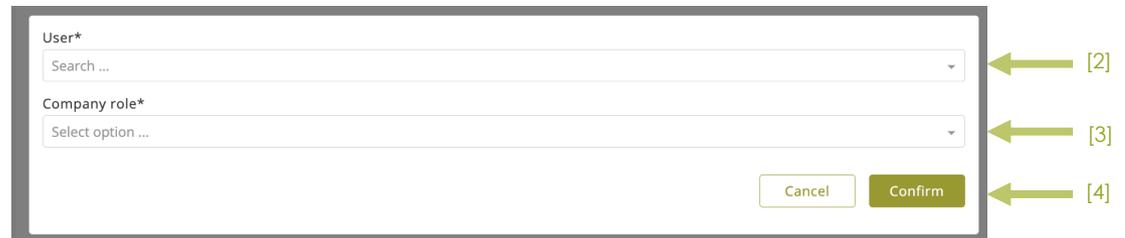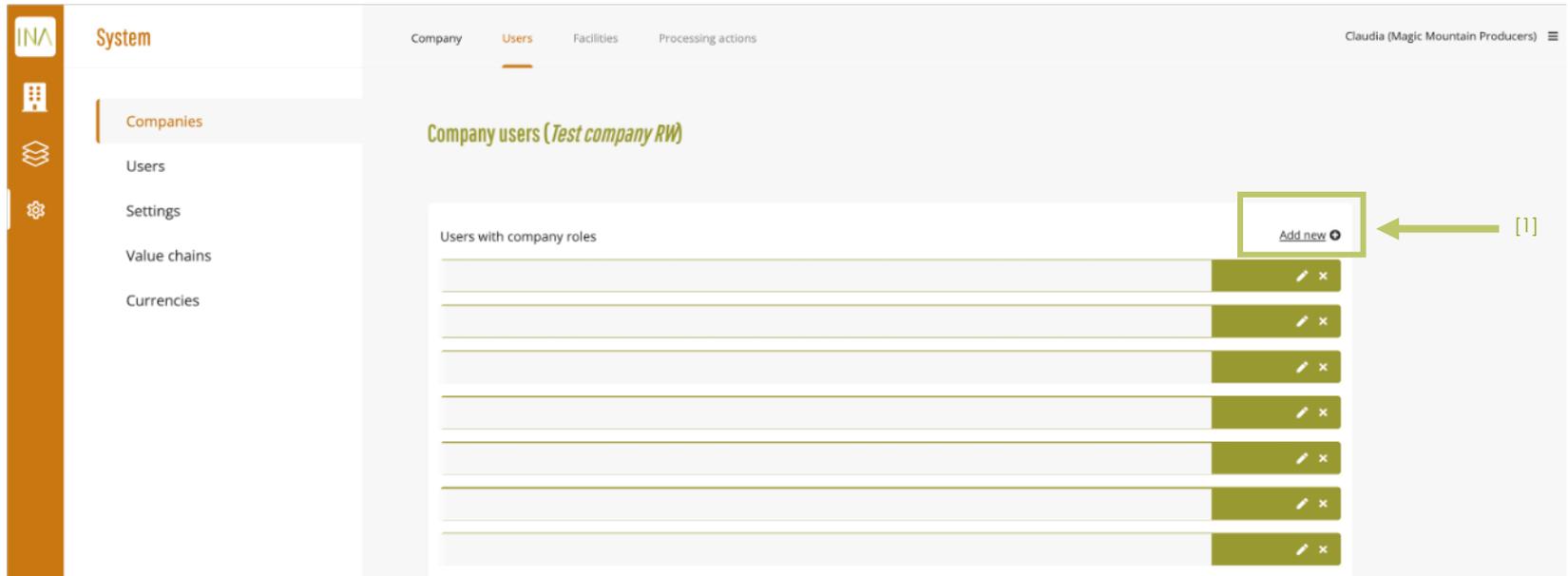
Chapter 4.

Farmer profiles

4.1 Upload an Excel file with farmer profiles

To upload a file with farmer profiles, you need the company's permission to access their company profile. To access the farmers' section of the company, click on the "Company" icon as shown on the screenshot below and select "Farmers" from the submenu. You can also go directly to "Farmers" tile as shown below.

Next: click on "import farmers".

You will find the Excel template in the upper part of the interface. The template will be available for download in the users' language. If you wish to download the template in another language, you need to change the system language in your user profile first. Make sure to always use the newest template available, otherwise the system will reject it when uploading the filled file.
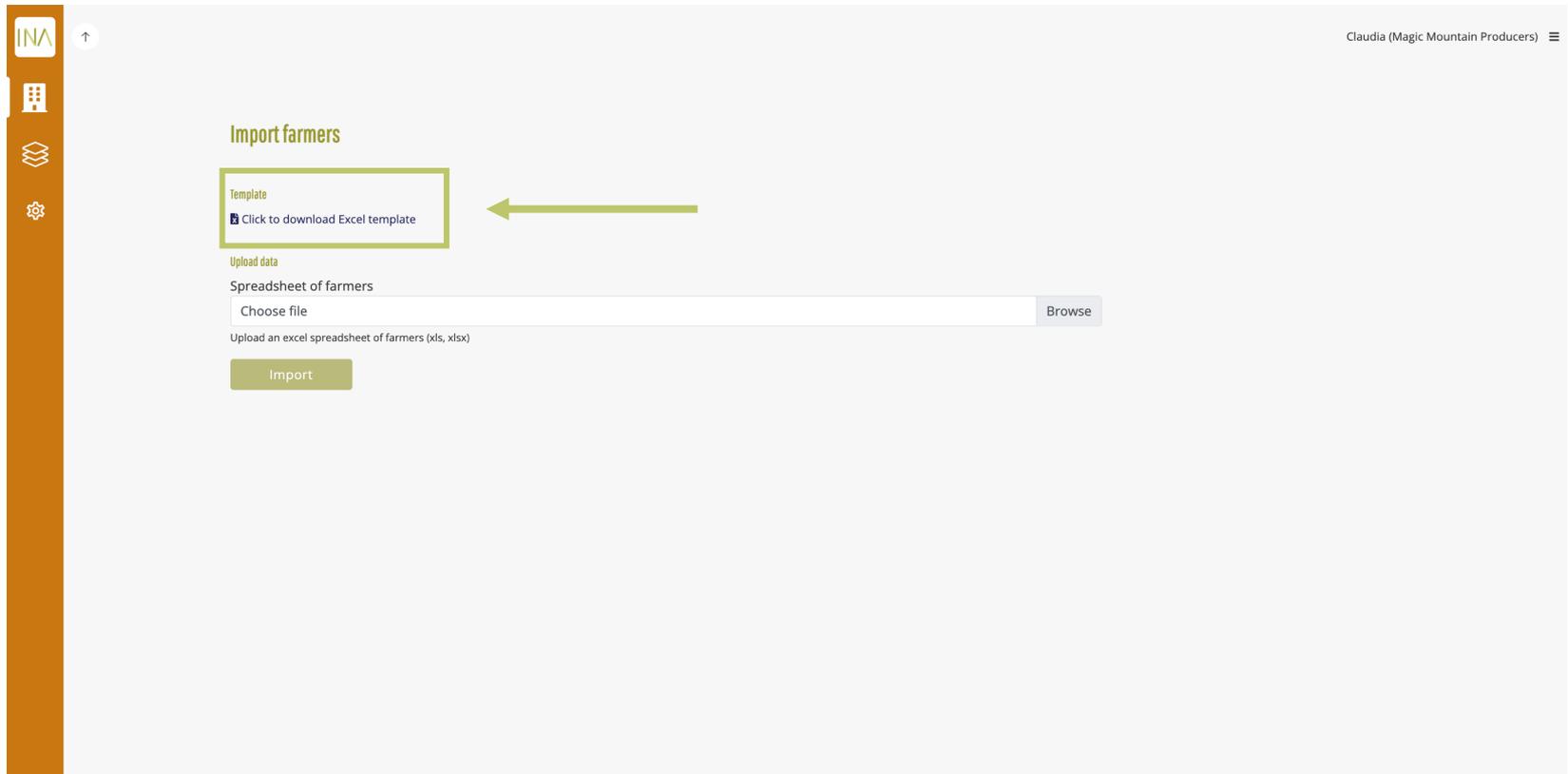
Before uploading any file to the system, please <u>check the data in the Excel sheet very carefully</u>. You will not be able to undo this. You can also upload the file in the test system first and conduct checks in case you are uploading a big file. "Browse" for your file and click "Import". Only click on import once, to ensure it is not added twice. The system will check for duplicates. You will be able to keep those or reject them.
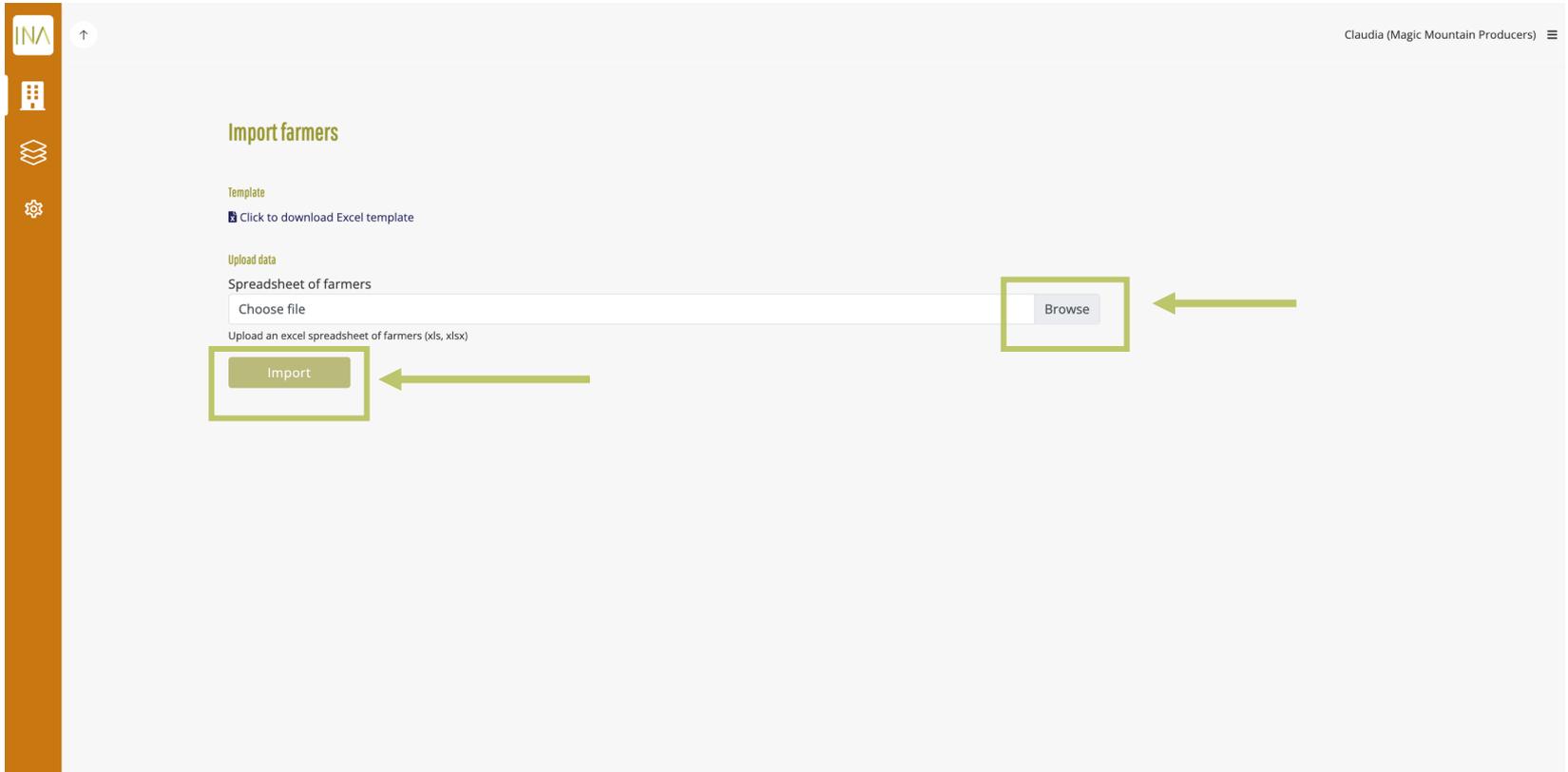
In case the file gets rejected by the system, check for the following common causes:

1. The template used was not up-to-date. Always download the newest version under "All stock" > "Farmers" > "Import farmers".
2. The template was modified. Adding or deleting columns or rows or modifying the format otherwise will make the system rejecting the file when uploading.
3. Your data entries are not in line with the allowed values of a specific column (e.g. if only "Y" and "N" are allowed, you cannot type in "Yes".
4. You have a formula in one or several cells. All data entries need to be converted to "value".
5. You added a space in one or several data cell at the beginning of the cell or you have entered a space (by clicking the spacebar) instead of leaving it empty in a column that is meant for numbers or dates.
6. Dates entered are non-existing or format for date was altered