

INA

Sustainable Agricultural  
Supply Chains Initiative



Trace

# ADMIN GUIDE

FOR REGIONAL AND SYSTEM ADMINS



# INATrace

The Traceability Tool  
for Sustainable Supply Chains

User guide 2024

# Table of Content

- [Chapter 1 Introduction](#) 04
  - [About this guide](#)
  - [Roles and permissions](#)
  
- [Chapter 2. System configurations](#) 07
  - [2.1 Adding elements on system level](#)
  - [2.2 Adding elements on value chain level](#)
  - [2.3 Adding companies](#)
  - [2.4 Adding products and linking companies \(stakeholders\)](#)
  
- [Chapter 3. Onboarding new users](#) 15
  - [3.1 Activate a new user](#)
  - [3.2 Add a new user to a company](#)
  
- [Chapter 4. Farmer profiles](#) 21
  - [4.1 Upload an Excel file with farmer profiles](#)

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.

[1] points to the Settings icon in the sidebar.

[2] points to the Settings menu item in the sidebar.

[3] points to the 'Types' tab in the 'Additional settings' section.

[3a] points to the '+ Add' button for semi-products.

[3a] points to the 'Edit' button for an existing semi-product.

**System**

- Companies
- Users
- Settings** [2]
- Value chains
- Currencies

**Additional settings** Types [3]

Claudia (Magic Mountain Producers) ☰

### Semi-products

List of semi-products  
Showing 65/10

Name ▲	Description ▲	Buyable	SKU	SKU end customer	Actions
Macadamia Waste	After sorting, damaged macadamia nuts are kept to be sold at a very low cost.				Edit Delete
Deshelled Cashew	After steaming the shell of the cashew to soften it, the shell of the raw cashew nut is removed with a specialized knife	✓			Edit Delete
Raw Cashew	Raw cashew after drying	✓			Edit Delete
Peeled Cashew Kernels	Peeled Kernels		✓		Edit Delete
Graded Cashew Kernels	.		✓		Edit Delete
Steamed Cashew	Steamed Cashew Kernels		✓		Edit Delete
Caja C6 FairTrade	Caja con 6 piñas FairTrade				Edit Delete
25 kg Packaged Cashew Kernels	Cashew Bags 25 kg		✓		Edit Delete
Pineapple	Piña recién cosechada Puede llegar en cajas de 10 unidades o en bins de X unidades	✓			Edit Delete
Dried fermented cocoa beans	Dried fermented cocoa beans at the cooperative.				Edit Delete

« 1 2 3 4 5 6 7 »

[3a] Add new semi-product

[3a] Edit existing semi-product

### Facility types

List of facility types  
Showing 10/14

id	Label ▲	Actions
WASHING_STATION	Pre-processing Facility	Edit Delete
DRYING_BED	Drying bed	Edit Delete

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.

**System**

- Companies
- Users
- Settings**
- Value chains
- Currencies

**Semi-products**  
List of semi-products  
Showing 65/10

Additional settings Types

Claudia (Magic Mountain Producers) ☰

Buyable = raw material or semi-product buyable directly from farmers. Semi-product will only be available in the companies' 'delivery' menu if this is ticked

SKU = Stock-keeping unit at company level

SKU = Stock-keeping unit at end-buyer

Name ▲	Description ▲	Buyable	SKU	SKU end customer	Actions
Macadamia Waste	After sorting, damaged macadamia nuts are kept to be sold at a very low cost.				Edit Delete
Deshelled Cashew	After steaming the shell of the cashew to soften it, the shell of the raw cashew nut is removed with a specialized knife		✓		Edit Delete
Raw Cashew	Raw cashew after drying	✓			Edit Delete
Peeled Cashew Kernels	Peeled Kernels		✓		Edit Delete
Graded Cashew Kernels	.		✓		Edit Delete
Steamed Cashew	Steamed Cashew Kernels		✓		Edit Delete
Caja C6 FairTrade	Caja con 6 piñas FairTrade				Edit Delete
25 kg Packaged Cashew Kernels	Cashew Bags 25 kg		✓		Edit Delete
Pineapple	Piña recién cosechada Puede llegar en cajas de 10 unidades o en bins de X unidades	✓			Edit Delete
Dried fermented cocoa beans	Dried fermented cocoa beans at the cooperative.				Edit Delete

« 1 2 3 4 5 6 7 »

**Facility types**  
List of facility types  
Showing 10/14

Id	Label ▲	Actions
WASHING_STATION	Pre-processing Facility	Edit Delete
DRYING_BED	Drying bed	Edit Delete

## 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.

The screenshot shows the INATrace 2.0 Admin Guide interface. On the left, a vertical sidebar contains navigation icons. An arrow labeled [1] points to the gear icon representing 'Settings'. Below it, an arrow labeled [2] points to the 'Value chains' menu item. The main content area displays the 'Value chains' settings page. At the top right, the user name 'Claudia (Montaña Mágica Productores)' is visible. Below the header, there is a 'New value chain' button, which is highlighted by a green box and an arrow labeled [3a]. Below this is a table listing value chains. The 'Edit' button for the 'Piña Costa Rica' entry is highlighted by a green box and an arrow labeled [3b].

Name ▲	Description ▼	Status ▼	Actions
Beeswax	This value chain covers the production of beeswax from raw honey to a refined and purified end-product.	ENABLED	Edit Enable Disable Delete
Café R. Dominicana	Cadena de suministro de café de la República Dominicana.	ENABLED	Edit Enable Disable Delete
Cashew	This is an example for a cashew value chain	ENABLED	Edit Enable Disable Delete
Cocoa	This is a generic cocoa value chain	ENABLED	Edit Enable Disable Delete
Coffee Honduras	This is the value chain setting for single origin coffee from Honduras.	ENABLED	Edit Enable Disable Delete
Coffee Rwanda	This is the value chain setting for single origin coffee from Rwanda.	ENABLED	Edit Enable Disable Delete
Macadamia Rwanda	This is the value chain setting of Macadamia Nuts from Rwanda.	ENABLED	Edit Enable Disable Delete
Piña Costa Rica	Piña producida en Costa Rica, con venta a compradores en todo el mundo.	ENABLED	Edit Enable Disable Delete

## 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.

The screenshot displays the INATrace 2.0 Admin Guide interface. On the left, a vertical sidebar contains the INATrace logo and several icons. A green box labeled [1] highlights the gear icon representing 'System'. To the right of the sidebar, the 'System' menu is expanded, and a green box labeled [2] highlights the 'Companies' option. The main content area shows the 'Companies' settings page. At the top right, the user is identified as 'Claudia (Magic Mountain Producers)'. Below this, there is a 'New company' button highlighted with a green box and an arrow labeled [3] 'Add new company'. The page also features a table of existing companies with columns for 'Name', 'Status', and 'Actions'. The table contains six rows, all with a status of 'ACTIVE'. The 'Actions' column for each row includes links for 'Edit', 'Activate', 'Deactivate', and 'Merge to'. At the bottom right of the table, there is a pagination control showing the current page is 4 out of 6.

Name	Status	Actions
	ACTIVE	Edit Activate Deactivate Merge to
	ACTIVE	Edit Activate Deactivate Merge to
	ACTIVE	Edit Activate Deactivate Merge to
	ACTIVE	Edit Activate Deactivate Merge to
	ACTIVE	Edit Activate Deactivate Merge to
	ACTIVE	Edit Activate Deactivate Merge to

## 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.

[1]

INA

Claudia (Magic Mountain Producers) ☰

### Products

List of products  
Showing 4/4

New product [2]

Filter Search

Beyco test beans

Test HND

Test RW

The Best Coffee

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.

The screenshot shows the INATrace web application interface. The browser address bar displays `https://test.inatrace.org/en/product-labels/9/stakeholders/value-chain`. The left sidebar contains a navigation menu with the following items: Product settings, QR labels, Knowledge blog, Stakeholders (highlighted with a green box and arrow labeled [1]), Final products, and Archive product. The main content area is titled 'Value chain' and features three sections: 'Exporters' (containing 'Export Pros'), 'Producers' (containing 'Magic Mountain Producers'), and 'Associations'. Each section has a corresponding '+ Add' button. A green box highlights the '+ Add exporter' button with a green arrow labeled [2]. The user's name 'Claudia (Magic Mountain Producers)' is visible in the top right corner.

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.

The screenshot displays the INATRACE admin interface. On the left, a vertical sidebar contains the INATRACE logo and several icons. Below the icons is a list of navigation items: Product settings, QR labels, Knowledge blog, Stakeholders (highlighted with an orange bar), Final products, and Archive product. The main content area is titled 'Value chain' and features a header with the user name 'Claudia (Magic Mountain Producers)' and a menu icon. The 'Product admins' section shows three entries: Magic Mountain Producers, CORWA, and Export Pros, each with a profile icon and a three-dot menu. A green arrow points from the 'Product admins' title to a '+ Add product admin' button. Below this is the 'Data sharing agreements' section, which includes a dashed box for input and an 'Add new' button with a plus sign. At the bottom right of the main content area are 'Back' and 'Save' buttons.

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.

The screenshot shows the INATrace system settings interface. On the left, a vertical navigation bar contains icons for System, Companies, Users, Settings, Value chains, and Currencies. The 'Users' icon is highlighted with a green box and an arrow labeled [1] 'Click here'. The 'Users' menu item in the sub-menu is also highlighted with a green box and an arrow labeled [2]. The main content area displays the 'Users' list with columns for Name, Surname, E-mail, Role, and Status. A filter dropdown is open, showing options: Show active, Show deactivated, Show confirmed email, Show unconfirmed, Show System admin, and Show Regional admin. The 'Show unconfirmed' option is highlighted with a green box and an arrow labeled [3].

Name	Surname	E-mail	Role	Status
...	...	...	USER	UNCO
...	...	...	USER	UNCO
...	...	...	USER	UNCO
n	...	...	USER	UNCO, ...
...	...	...	USER	UNCONFIRMED
...	...	...	USER	UNCONFIRMED
...	...	...	USER	UNCONFIRMED

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.

The screenshot displays the 'Edit user profile' interface in the INATrace System. The left sidebar is titled 'System' and includes a menu with 'Users' highlighted. The main content area is divided into three sections: 'Basic information', 'User language', and 'User companies'. The 'Basic information' section contains a 'Confirm user email' button, which is highlighted with a green arrow and a '[1]' label. The 'User language' section shows 'Selected' as EN and 'Available' as DE, RW, and ES. The 'User companies' section shows 'No companies'. At the bottom right, there are 'Go back' and 'Save' buttons, with a green arrow pointing to the 'Save' button and a '[2]' label.

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.

System

Claudia (Magic Mountain Producers) ☰

Companies

Users

Settings

Value chains

Currencies

### Users

List of users  
Showing 3/172

Show confirmed\_email x Filter Search

Name ▲	Surname ▼	E-mail ▼	Role	Status	Actions
				CONFIRMED_EMAIL	Edit Activate Deactivate
				CONFIRMED_EMAIL	Edit Activate Deactivate
				CONFIRMED_EMAIL	Edit <b>Activate</b> Deactivate

[1]

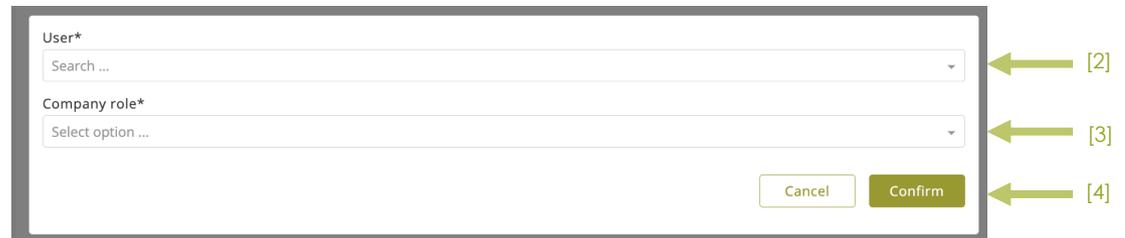
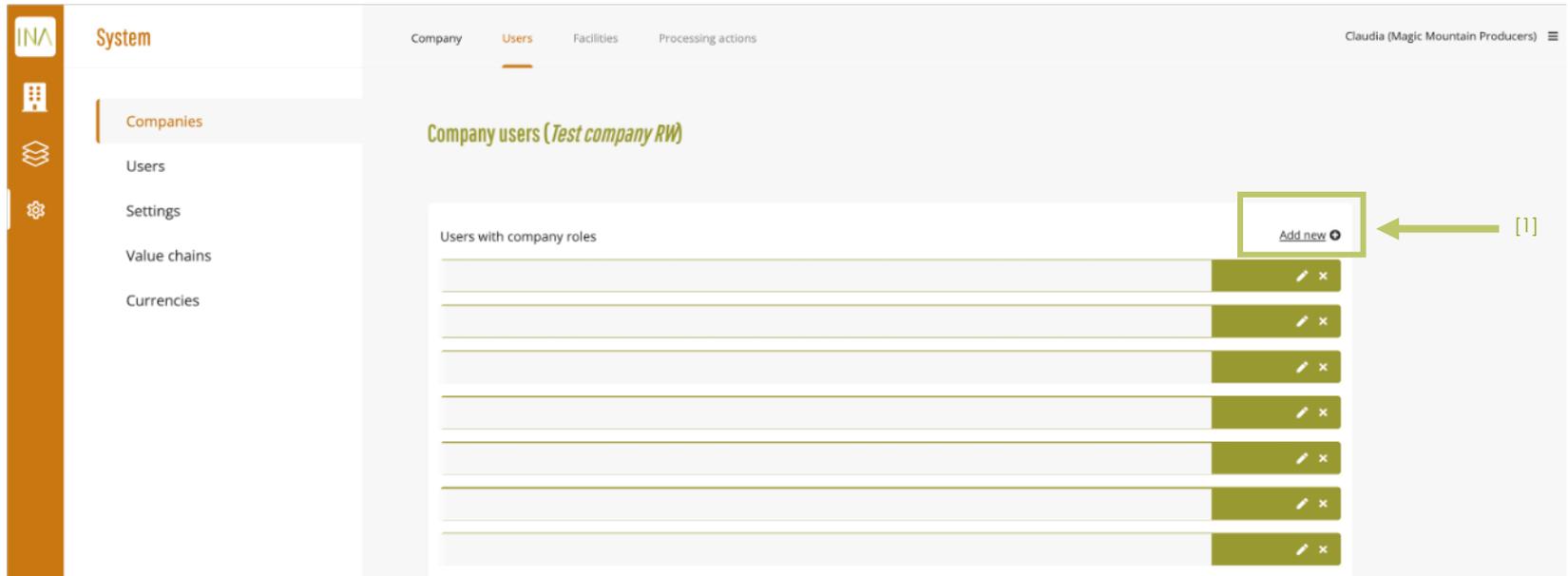
## 3.2 Add a new user to a company

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

The screenshot displays the INATrace system interface. On the left, a vertical orange sidebar contains the 'System' menu with icons for Companies, Users, Settings, Value chains, and Currencies. The 'Companies' menu item is highlighted with a green box. The main content area is titled 'Companies' and shows a list of companies. The table has columns for Name, Status, and Actions. The 'Edit' button in the Actions column for the last row is highlighted with a green box and a green arrow. The page also includes a 'New company' button, a search bar, and pagination controls.

Name	Status	Actions
	ACTIVE	Edit Activate Deactivate Merge to
	ACTIVE	Edit Activate Deactivate Merge to
	ACTIVE	Edit Activate Deactivate Merge to
	ACTIVE	Edit Activate Deactivate Merge to
	ACTIVE	Edit Activate Deactivate Merge to
	ACTIVE	Edit Activate Deactivate Merge to

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.

The screenshot displays the INATrace user interface. On the left is a vertical orange sidebar with the INATrace logo at the top and three icons below it: a building, a stack of boxes, and a truck. The main content area is white and contains a top navigation bar with the text "Claudia (Magic Mountain Producers)" and a menu icon. Below this is a grid of five white tiles with green icons and labels: "My stock" (house icon), "Orders" (clipboard icon), "Farmers" (farmer icon), "Collectors" (truck icon), and "Dashboard" (bar chart icon). The "Farmers" tile is highlighted with a green border. A green arrow points from the text "[1] Click here" to the building icon in the sidebar. Another green arrow points from the text "[1] Alternatively, click here" to the "Farmers" tile. Below the grid is a section titled "My Products" with three product tiles: "Beyco test beans" (coffee beans), "Test RW" (latte), and "Test HND" (coffee beans).

Next: click on "import farmers".

Magic Mountain Producers

Claudia (Magic Mountain Producers)

### Farmers

List of farmers  
Showing 10/14

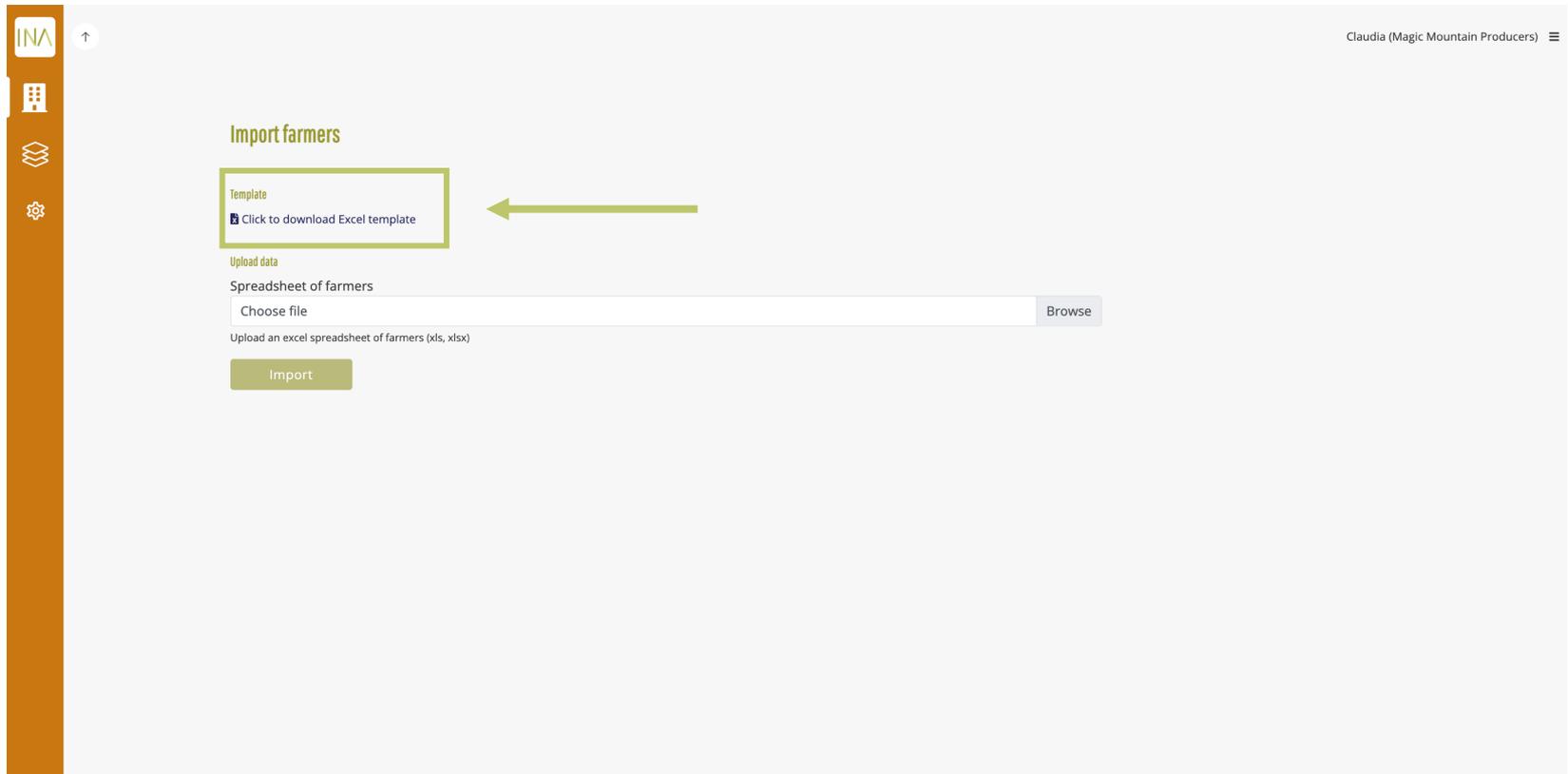
+ Import farmers + Add farmer

Search

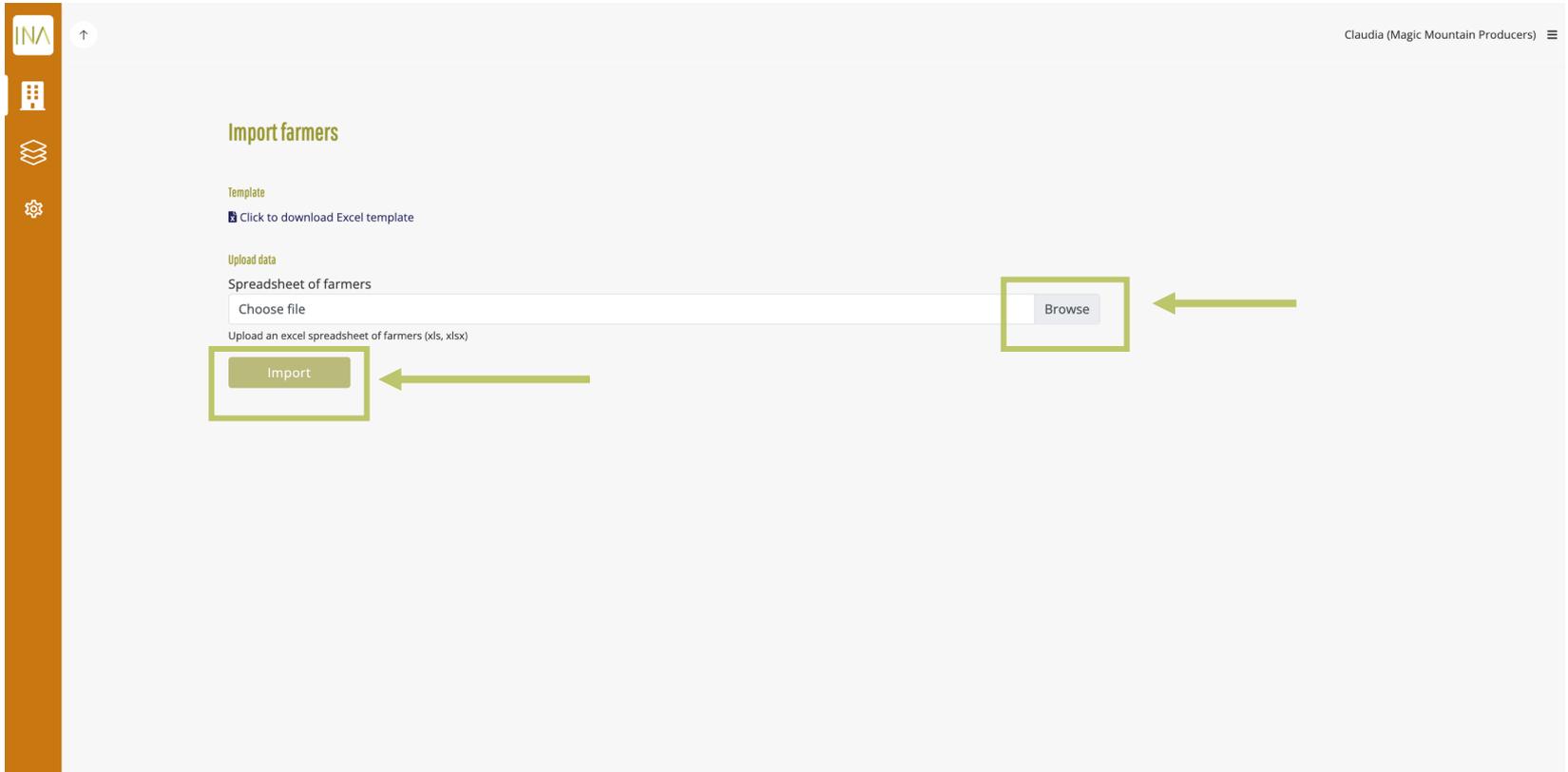
First name	Last name	Gender	Id	Village	Cell	Actions
Claudine	Niyokwizerwa	FEMALE	37	Masoro	Cell A	Edit Delete
Jean	Uwimana	MALE	5509	Ruhengeri	100	Edit Delete
Josianne	Uwayo	FEMALE	44	Nyamabuye	Cell A	Edit Delete
Joy	Uwituze	FEMALE	45	Remera	Cell B	Edit Delete
Jules	César	MALE	5506	Muhanga	Masoro	Edit Delete
Lolo	Svara	N_A	6211	Ruhango	30	Edit Delete
Marie	Ineza	FEMALE	185	Village A	Cell A	Edit Delete
Marie Claire	Uwimana	FEMALE	40	Rubungo	Cell B	Edit Delete
Misael	León	MALE	5508	Macanudo	34	Edit Delete
Pascal	Tuyishime	MALE	17	Imena	Cell A	Edit Delete

« 1 2 »

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 check the data in the Excel sheet very carefully. 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