

# INATrace ADMIN GUIDE



FOR REGIONAL AND SYSTEM ADMINS



# INATrace

The Traceability Tool for Sustainable  
Supply Chains

Admin Guide 2025



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## 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> ) and to the INATrace Wiki (<https://inatrace-docs.github.io>)
- 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 or are part of	No	No
Can activate new users	Yes	Yes	No	No
Can add users to a company	Yes	Only users they activated / only companies they created or are part of	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]

[2]

[3]

[3a] Add new semi-product

[3a] Edit existing semi-product

**System**

Companies

Users

**Settings**

Value chains

Currencies

Additional settings

Types

**Semi-products**

List of semi-products

Showing 65/10

+ Add

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

+ Add

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.

INA

System

Companies

Users

Settings

Value chains

Currencies

Additional settings

Types

Claudia (Magic Mountain Producers)

Semi-products

List of semi-products

Showing 65/110

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

+ Add

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 bines 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

+ Add

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 sidebar contains a 'System' menu with options: Companies, Users, Settings, Value chains, and Currencies. A green box [1] highlights the 'Settings' icon, and a green box [2] highlights the 'Value chains' option. The main content area is titled 'Value chains' and shows a list of value chains. A green box [3a] highlights the 'New value chain' button, and a green box [3b] highlights the 'Edit' button for the 'Piña Costa Rica' value chain.

[1]

[2]

[3a] Add new value chain

[3b] Edit existing value chain

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 / create a new company** in the system, 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 their company profile.

The screenshot displays the INATrace 2.0 Admin Guide interface. On the left, a sidebar contains the 'System' menu with options: Companies, Users, Settings, Value chains, and Currencies. The 'Companies' option is highlighted with a green box and labeled [2]. A green arrow labeled [1] points to the sidebar icon. The main content area shows the 'Companies' section with the title 'List of companies' and 'Showing 6/81'. A green box highlights the 'New company' button, with a green arrow labeled [3] pointing to it and the text '[3] Add new company'. Below the button is a table of companies.

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

At the bottom right, there is a pagination control showing '1 2 3 4' with '4' selected.

## 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 that are part of the same supply chain (meaning they exchange (semi-)products). This allows them to access selected traceability information along the supply chain by using the "order" functionality in the system which allows sharing data related to a specific batch along the supply chain. Furthermore, a company that is not linked to any product, will not be able to use essential system functions like adding deliveries.

The screenshot displays the INATrace 2.0 Admin Guide interface. On the left, a vertical sidebar contains three icons: a building, a factory, and a stack of boxes. A green arrow labeled [1] points to the stack of boxes icon. The main content area is titled 'Products' and shows a 'List of products' with 'Showing 4/4'. Below the title, there are four product cards: 'Beyco test beans' (image of coffee beans), 'Test HND' (image of coffee beans), 'Test RW' (image of a latte), and 'The Best Coffee' (image of a cup of coffee). In the top right corner of the main content area, there is a 'New product' button, a 'Filter' button, and a 'Search' button. A green arrow labeled [2] points to the 'New product' button. The top right of the interface shows the user 'Claudia (Magic Mountain Producers)' and a menu icon.

After completing and saving the “Product setting” section, navigate under the products menu to the “Stakeholders” submenu and add all companies related to this product which you wish to connect. You need to create the companies in the system beforehand. Note that “producers” refers to producer organizations who buy from farmers or collectors (intermediaries), it does not mean farmers. Farmers and collectors are added by the producer organizations within their company profile. You will not see them in this section.

The screenshot displays the INATrace web application interface. The browser address bar shows the URL: <https://test.inatrace.org/en/product-labels/9/stakeholders/value-chain>. The sidebar on the left contains the INATrace logo and navigation icons. The main content area is titled 'Value chain' and shows the 'Stakeholders' section. The 'Stakeholders' section is divided into three sub-sections: 'Exporters', 'Producers', and 'Associations'. The 'Exporters' section contains a card for 'Export Pros'. The 'Producers' section contains a card for 'Magic Mountain Producers'. The 'Associations' section contains a '+ Add association' button. The right-hand panel contains three buttons: '+ Add exporter', '+ Add producer', and '+ Add association'. A green box labeled [1] highlights the 'Stakeholders' option in the sidebar, and a green box labeled [2] highlights the '+ Add exporter' and '+ Add producer' buttons.

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. This is only relevant if the respective stakeholders plan to use QR Codes. Additionally, you can upload data sharing agreements that have been agreed on by the stakeholders.

The screenshot displays the INATrace 2.0 Admin Guide interface. On the left is a vertical sidebar with the INATrace logo and icons for a building, layers, and a gear. The main content area is titled 'Product' with a back arrow icon. Below the title is a placeholder image of a coffee cup. A sidebar menu on the left lists 'Product settings', 'QR labels', 'Knowledge blog', 'Stakeholders' (highlighted with an orange bar), 'Final products', and 'Archive product'. The main content area is divided into two sections: 'Value chain' and 'Product admins'. The 'Value chain' section has a header 'Value chain' and a user profile 'Claudia (Magic Mountain Producers)' with a menu icon. Below this is a 'Product admins' section with a green arrow pointing to a '+ Add product admin' button. There are three admin cards: 'Magic Mountain Producers', 'CORWA', and 'Export Pros', each with a green icon and a three-dot menu icon. Below this is a 'Data sharing agreements' section with a header 'Data sharing agreements' and an 'Add new' button. A dashed box contains the text 'Add new'. At the bottom right are 'Back' and 'Save' buttons.

Product

Value chain

Claudia (Magic Mountain Producers)

Product admins

+ Add product admin

Magic Mountain Producers

CORWA

Export Pros

Data sharing agreements

Add new

Back

Save



## 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 orange sidebar 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 main content area is titled 'System' and shows a list of settings. The 'Users' setting is highlighted with a green box and an arrow labeled [2]. The 'Users' section displays a list of users with columns for Name, Surname, E-mail, Role, and Status. A filter menu is open, showing options like 'Show active', 'Show deactivated', 'Show confirmed email', and 'Show unconfirmed'. The 'Show unconfirmed' option is highlighted with a green box and an arrow labeled [3].

**System**

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

**Users**  
List of users  
Showing 7/172

Show unconfirmed x Filter Search

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

[1] Click here

[2]

[3]



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 INATrace System interface for editing a user profile. The left sidebar, under the 'System' header, lists 'Companies', 'Users' (highlighted), 'Settings', 'Value chains', and 'Currencies'. The main content area is titled 'Edit user profile' and includes the following sections:

- Basic information:** A large empty text area, a 'Reset password' button, and a 'Confirm user email' button. A green arrow labeled [1] points to the 'Confirm user email' button.
- User language:** A section with 'Selected' (EN) and 'Available' (DE, RW, ES) language options.
- User companies:** A section showing 'No companies'.

At the bottom right, there are 'Go back' and 'Save' buttons. A green arrow labeled [2] points to the 'Save' button.

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

Companies

Users

Settings

Value chains

Currencies

Claudia (Magic Mountain Producers) ☰

### 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

## 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 2.0 Admin Guide interface. On the left, the 'System' menu is open, and 'Companies' is selected. The main content area shows the 'Companies' page with a table of companies. The 'Edit' button for the last row is highlighted, and a green arrow points to it.

**System**

- Companies
- Users
- Settings
- Value chains
- Currencies

**Companies**

List of companies  
Showing 6/81

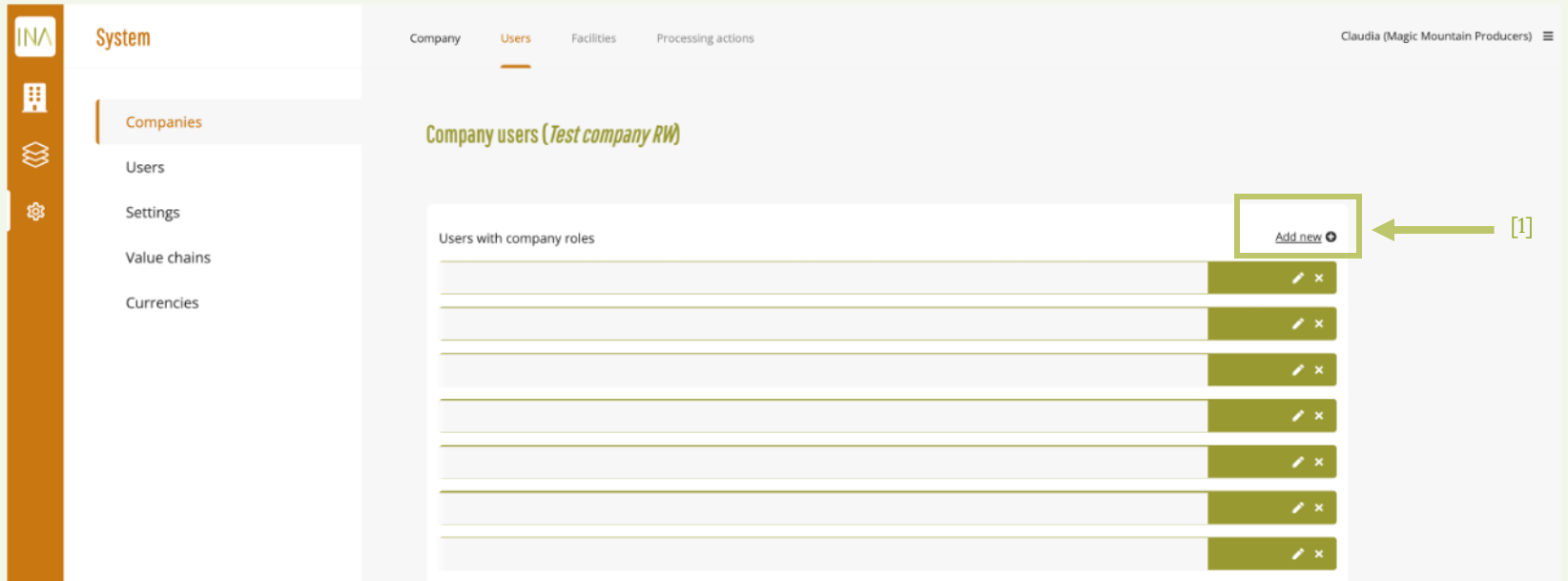
New company

Show active x My companies x Filter Search

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

« 1 2 3 4 »

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”.



The dialog box for adding a new user. It contains two dropdown menus: 'User\*' and 'Company role\*'. The 'User\*' dropdown has a search field. The 'Company role\*' dropdown has a 'Select option ...' option. There are 'Cancel' and 'Confirm' buttons at the bottom right. Arrows labeled [2], [3], and [4] point to the 'User\*', 'Company role\*', and 'Confirm' buttons respectively.

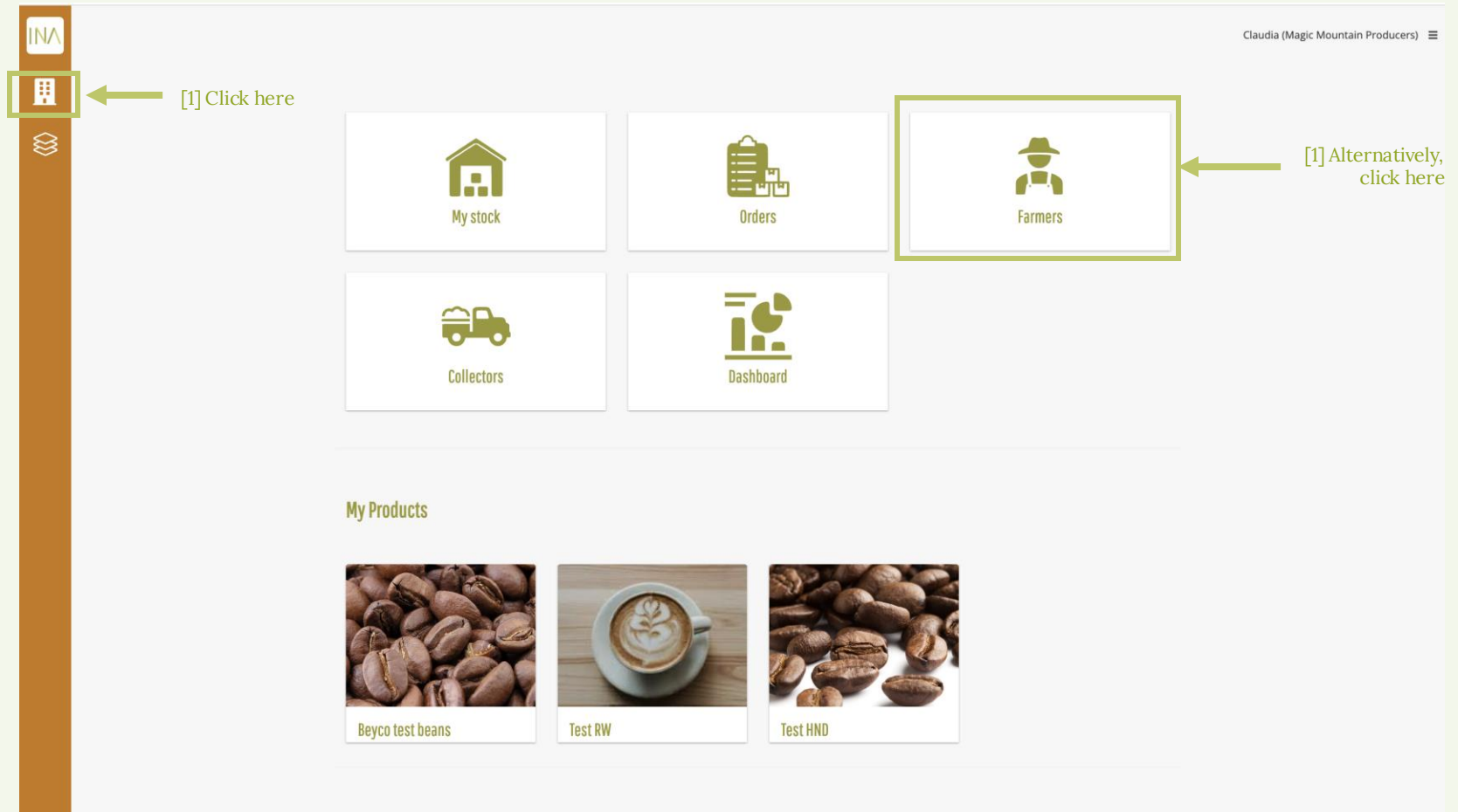


## Chapter 4.

# 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".

INA

Magic Mountain Producers



My stock

Orders

Farmers

Collectors

Dashboard

Farmers

List of farmers

Showing 10/14

+ Import farmers

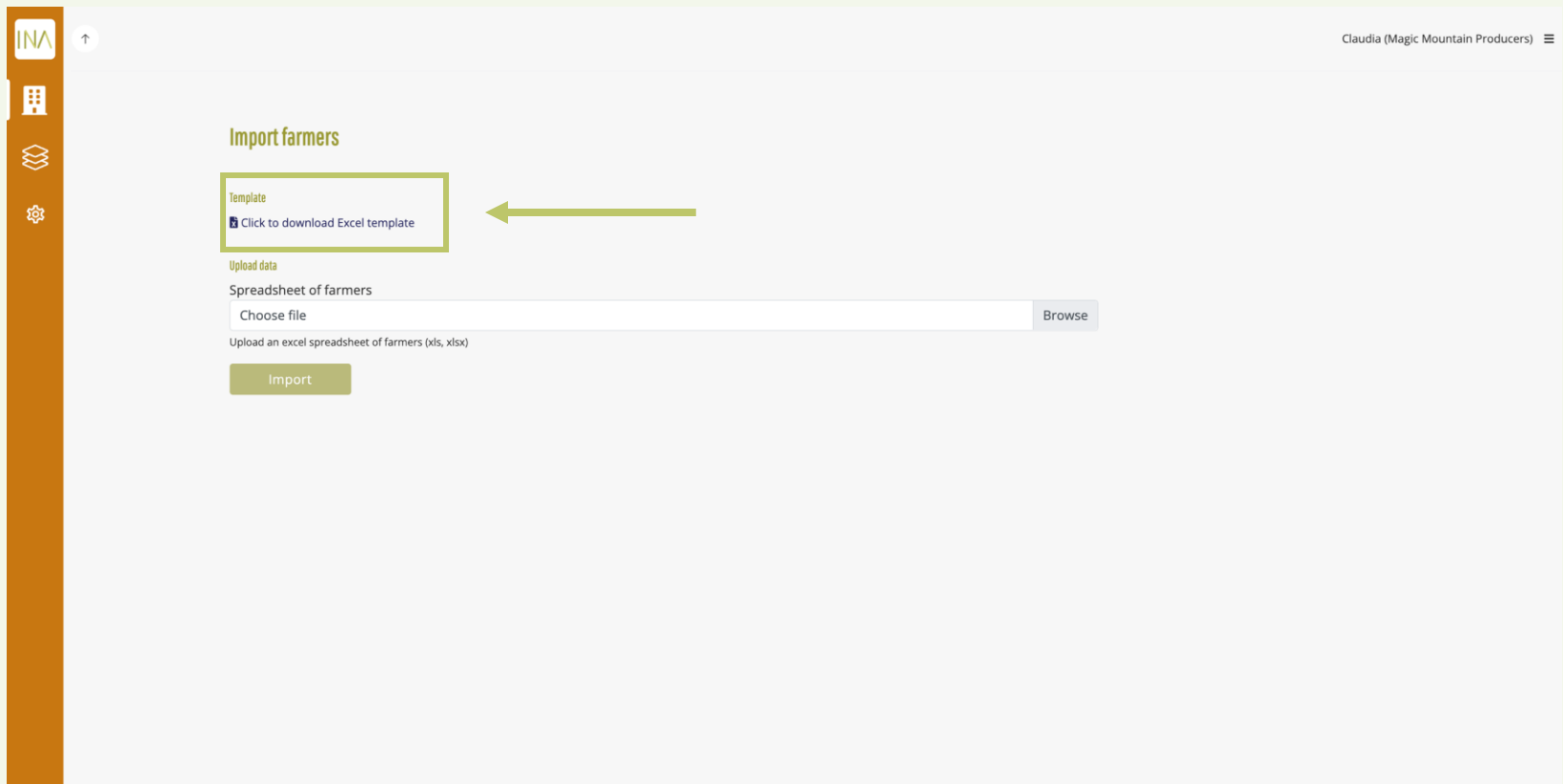
+ Add farmer

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.

The screenshot shows the 'Import farmers' section of a web application. On the left is a vertical orange sidebar with icons for INA, a list, a stack, and a gear. The main content area has a header 'Import farmers' and a sub-header 'Template' with a link 'Click to download Excel template'. Below this is the 'Upload data' section, titled 'Spreadsheet of farmers', which contains a 'Choose file' input field and a 'Browse' button. A green arrow points to the 'Browse' button. Below the input field is the instruction 'Upload an excel spreadsheet of farmers (xls, xlsx)' and an 'Import' button. A green arrow points to the 'Import' button. The top right corner shows the user 'Claudia (Magic Mountain Producers)' and a menu icon.

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



**SASI – Sustainable Agricultural Supply Chains Initiative by**

On behalf of



Federal Ministry  
for Economic Cooperation  
and Development