



Administration Guide | CONFIDENTIAL  
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# Administrator's Guide for SAP Rural Sourcing Management

## Release 2112

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# 1 SAP Rural Sourcing Management Overview

SAP Rural Sourcing Management is a mobile business application connecting smallholder farmers and suppliers in rural areas with the supply chain of global agribusinesses and consumer products companies. The Rural Sourcing Management mobile application is also utilized by plastic waste pickers and aggregators working within the circular economy to track volumes, types of plastics and prices paid for plastic waste across the value chain.

SAP Rural Sourcing Management is specifically designed to increase productivity and improve communities' livelihoods by providing full transparency on the supply chain and their participants and full traceability of agricultural products or plastic waste materials.

Developed on the SAP HANA Cloud Platform, an in-memory Cloud platform based on open standards, the SAP Rural Sourcing Management solution provides access to a feature-rich, easy-to-use development environment in the Cloud. The platform includes a comprehensive set of services for integration, enterprise mobility, collaboration, and analytics.

The Rural Sourcing Management solution is comprised of a mobile application and a Web interface. It uses a Cloud-based server application as the central point of data consolidation and distribution to participating desktop and mobile clients over a lightweight synchronization mechanism.

The mobile application is designed for Android smart phones and is intended for use in the field. For agricultural products, the mobile application provides full electronic traceability from the earliest stage of individual smallholder farmer deliveries to the weighing bridge. For recycled plastic waste in the circular economy, it provides digital tracking and transparency about recycled plastic prices so plastic pickers can receive a fair price and avoid exploitation. The application is fully offline-enabled with full bandwidth optimization, allowing for transaction data management and data analytics in the field. With electronic data capture using the smart phones, the need for paper is virtually eliminated.

The Web Interface is a Cloud application that provides for comprehensive supply chain management. It is intended for use by management and Central Operations to monitor and maintain the various pieces of the master data as well as all transaction data.

## [Prerequisites \[page 6\]](#)

To use the Rural Sourcing Management application, there are minimum and recommended mobile device and browser requirements.

## [Purpose and Scope \[page 7\]](#)

The Administration Guide provides a central starting point for the technical configuration of the Rural Sourcing Management application.

## [Logon and Site Authorization \[page 8\]](#)

Rural Sourcing Management users are maintained in SAP Cloud Identity.

## [SAP RSM Components \[page 8\]](#)

The Rural Sourcing Management solution is comprised of a mobile application as well as a Web interface that includes reporting functions.

## 1.1 Prerequisites

To use the Rural Sourcing Management application, there are minimum and recommended mobile device and browser requirements.

### Smart Phone Requirements

	Minimum	Recommended
Operating System	Android 5.1	Android 10
Display	4.5 inches	5 inches
Resolution	1280x720 pixels	1280x720 pixels
CPU	Quad-core, 2 GHz	Quad-core, 2500 MHz
RAM	2 GB	4 GB
Internal Memory	16 GB	64 GB
Camera	Yes	Yes
Mobile Data	Yes	Yes
WLAN	Yes	Yes
GPS	Yes	Yes
USB	micro USB or USB-C connection	micro USB or USB-C connection
Battery	3000 mAh	4000 mAh

### Reference Devices

The SAP Mobile SDK has been tested on the following devices with the specified device operating systems.

Device	Device OS
Google Nexus 5	Android 5.1
Samsung Galaxy S6	Android 5.1.1
Xiaomi Redmi 7A	Android 9.0

Device	Device OS
TECNO Spark 3	Android 9.0

### i Note

Refer to SAP Note 1933857 <https://service.sap.com/sap/support/notes/> for further information.

## Supported Browsers

Only browsers with HTML5 capabilities are supported to run the Rural sourcing Management Web interface.

Platform	Device Category	Platform Version	Google Chrome
Windows	Desktop	Windows 7, 8.1, 10	Latest version

**Parent topic:** [SAP Rural Sourcing Management Overview \[page 5\]](#)

## Related Information

[Purpose and Scope \[page 7\]](#)

[Logon and Site Authorization \[page 8\]](#)

[SAP RSM Components \[page 8\]](#)

## 1.2 Purpose and Scope

The Administration Guide provides a central starting point for the technical configuration of the Rural Sourcing Management application.

This guide describes all activities necessary for the administration of Rural Sourcing Management. It provides instructions for the back end configuration that is completed by your system administrator with input and direction from SAP personnel as well as use and settings to be configured with the various application features by users in the field.

**Parent topic:** [SAP Rural Sourcing Management Overview \[page 5\]](#)

## Related Information

[Prerequisites \[page 6\]](#)

[Logon and Site Authorization \[page 8\]](#)

[SAP RSM Components \[page 8\]](#)

## 1.3 Logon and Site Authorization

Rural Sourcing Management users are maintained in SAP Cloud Identity.

User creation and authorization through application roles are maintained through the Web interface by your system administrator. Initial onboarding and subsequent login to the mobile application utilizes the SAP Mobile SDK logon functionality.

For a list of user roles and application-specific transaction access, see [User Roles \[page 43\]](#) and [Tables of Permissions \[page 44\]](#).

### i Note

If you do not know your user name or password, please contact your system administrator.

**Parent topic:** [SAP Rural Sourcing Management Overview \[page 5\]](#)

## Related Information

[Prerequisites \[page 6\]](#)

[Purpose and Scope \[page 7\]](#)

[SAP RSM Components \[page 8\]](#)

## 1.4 SAP RSM Components

The Rural Sourcing Management solution is comprised of a mobile application as well as a Web interface that includes reporting functions.

### Mobile Application

The mobile application is designed for Android smart phones and is intended for use in the field. The mobile application provides full electronic traceability from the earliest stage of individual farmer deliveries to the

weighing bridge. The application is fully offline-enabled with full bandwidth optimization. With electronic data capture using the smart phones, the need for paper is virtually eliminated.

Functions that can be accomplished from the mobile device include:

- Farmer registration and master data updates
- Farmer surveys
- Price information
- Farmer purchasing
- Certification process support and traceability
- Advances and capturing of (m-) payments
- Transportation logistics
- Grading and quality indicators
- Farm field mapping
- Input Distribution
- Delivery Agreement
- Training Attendance
- Garden Sales
- Cash loans
- Secret Farmer PIN authorization

## Web Interface

The Web interface is a Cloud application that provides for comprehensive supply chain management. The Web interface is intended for use by management and Central Operations to monitor and maintain the various pieces of the master data and transaction data. With the Rural Sourcing Management Web interface, you will have more efficient operations overall, due to up-to-date information on storage and logistics. The interface also allows for a direct exchange of information with market participants and gives immediate responses to quality incidents.

Functions that can be accomplished from the Web interface include:

- Mass master data management
- Transaction data access management
- Market information and price distribution
- Device synchronization and monitoring

**Parent topic:** [SAP Rural Sourcing Management Overview \[page 5\]](#)

## Related Information

[Prerequisites \[page 6\]](#)

[Purpose and Scope \[page 7\]](#)

Logon and Site Authorization [page 8]

## 2 Installation and System Setup

The initial system setup refers to back end configuration that is completed by your system administrator with input and direction from SAP personnel, based on your business needs.

For system installation information, see [Application Installation \[page 11\]](#).

Initial setup is mandatory before the Rural Sourcing Management system can be used. Setup is completed by your system administrator in conjunction with SAP personnel using the Rural Sourcing Management Web Interface. Items that must be defined and configured include:

- General Settings
- Crop Selection
- Transaction Selection

### [Application Installation \[page 11\]](#)

The mobile component of the Rural Sourcing Management solution must be downloaded and installed on the mobile device. The Web interface component of the solution is accessible through a URL that is provided by SAP personnel.

### [General Settings \[page 12\]](#)

As part of the initial system setup, you must define some basic general settings. This is completed by SAP personnel with input and direction from your system administrator.

### [Crop Selection \[page 13\]](#)

During initial system setup, you must select the crop that applies to your business. This is completed by your system administrator with input and direction from SAP personnel.

### [Transaction Configuration Examples \[page 15\]](#)

As part of the initial system setup, you must select those transactions that are necessary for your business needs. This is completed by your administrator with input and direction from SAP personnel.

### 2.1 Application Installation

The mobile component of the Rural Sourcing Management solution must be downloaded and installed on the mobile device. The Web interface component of the solution is accessible through a URL that is provided by SAP personnel.

The following release channels are available for the Rural Sourcing Management components:

- **Android mobile application:** Direct On-premise
- **HCP/WebUI:** Cloud Direct (SaaS, PaaS, IaaS)

Customers can obtain and access the Rural Sourcing Management system here:

- **Android mobile application:** SAP Software MarketPlace
- **HCP/WebUI:** No installation is required, it is available in the SAP Public Cloud. SAP will provide the URL to the Web interface.

### i Note

To properly set up the mobile application and see the mobile transactions, you must first perform a [Transaction Synchronization](#) to download the database to the mobile device. Prior to [Transaction Synchronization](#), the mobile application will not function properly.

**Parent topic:** [Installation and System Setup \[page 11\]](#)

## Related Information

[General Settings \[page 12\]](#)

[Crop Selection \[page 13\]](#)

[Transaction Configuration Examples \[page 15\]](#)

## 2.2 General Settings

As part of the initial system setup, you must define some basic general settings. This is completed by SAP personnel with input and direction from your system administrator.

There are three general settings to be determined are the application name, currency, and language. Examples are shown in the table.

Setting	Example	Comments
Name	Example_Coffee_app	This is the name of the application that is displayed on the mobile application and the top of the Web interface.
Currency	UGX	This can be any country currency.
Language	English	This can be any of the supported languages, which include: <ul style="list-style-type: none"><li>• English</li><li>• French</li><li>• Portuguese</li><li>• Spanish</li></ul>

**Parent topic:** [Installation and System Setup \[page 11\]](#)

## Related Information

[Application Installation \[page 11\]](#)

[Crop Selection \[page 13\]](#)

[Transaction Configuration Examples \[page 15\]](#)

## 2.3 Crop Selection

During initial system setup, you must select the crop that applies to your business. This is completed by your system administrator with input and direction from SAP personnel.

Typically, you are only able to select one crop. In special cases, customers will be allowed to select a second crop.

Available crops include:

- Cashew
- Cocoa
- Coffee
- Cotton
- Macadamia
- Rice
- Sesame
- Shea

Once you select your crop, you can optionally add:

- **Certifications** - Certifications ensure specific standards, such as agricultural practice, trade standards, labor standards, and so on.
- **Product types** - Product types can be based on different plant species, the degree of processing, or other characteristics of the selected crop.

Both of these are discussed in more detail later in this topic.

### i Note

The quality indicators available for the various crops are dependent on the transaction type. As part of the initial system setup, you must define the quality indicators for your selected crop or crops. After you select the quality indicators you want to be active, you can configure which are to be mandatory and which can be voluntary. See the appropriate transaction configuration section in this guide for details on the available quality indicators.

## Certifications

Certifications ensure specific standards, such as agricultural practice, trade standards, labor standards, and so on. Farmers comply with certification standards through recurring farm inspections and a membership

in certification organizations. The Rural Sourcing Management system supports this processes through the recording and tracking of certifications.

Selecting certifications will have an effect on both the transactions in the Rural Sourcing Management application as well as the initial master data setup.

Certification Examples	Effect on Transactions in the RSM Application	Effect on the Initial Master Data Setup
For the cocoa crop, certifications could include <b>UTZ cocoa</b> , <b>Rainforest Alliance cocoa</b> , and so on.	You can set a different price for each certification.  When capturing a buying transaction for a certain farmer, only those products that he or she is certified for will appear as an option.	Certifications must be defined for each farmer on the <i>Persons</i> sheet of the master data template.  All certifications must be captured on the <i>Organizations</i> sheet of the master data template.

### Note

For details on the initial master data setup, see [Initial Master Data Setup \[page 39\]](#).

## Product Types

Product types can be based on different plant species, the degree of processing, or other characteristics of the selected crop.

Selecting product types will have an effect on the transaction in the Rural Sourcing Management application.

Product Type Examples	Effect on Transactions in the RSM Application	Effect on the Initial Master Data Setup
For the coffee crop, the product types could include: <ul style="list-style-type: none"> <li>• <b>Fresh Arabica coffee</b></li> <li>• <b>Dried Arabica coffee</b></li> <li>• <b>Fresh Robusta coffee</b></li> <li>• <b>Dried Robusta coffee</b></li> </ul>	You can set a different price for each product type.  When capturing a buying transaction for a certain farmer, all product types will appear as options.	No effect. Product types do not need to be captured on the Master Data template.

Parent topic: [Installation and System Setup \[page 11\]](#)

## Related Information

[Application Installation \[page 11\]](#)

## 2.4 Transaction Configuration Examples

As part of the initial system setup, you must select those transactions that are necessary for your business needs. This is completed by your administrator with input and direction from SAP personnel.

The following transaction configurations are examples. This is not a complete list of possible configurations. The details configuration is aligned with SAP personnel.

Transaction	Description
Farmer Registration	<i>Farmer Registration</i> transactions enable Buying Station Managers to immediately register additional smallholder farmers through a simple process using the mobile Rural Sourcing Management application.
Individual Buying	An <i>Individual Buying</i> transaction records the sale of agricultural products from a smallholder farmer to a Buying Station.
Payment	A <i>Payment</i> transaction occurs when the smallholder farmer is paid for the agricultural product.
Advance	An <i>Advance</i> transaction enables smallholder farmers to receive money for a future delivery of agricultural products.
Loan Application	The <i>Loan Application</i> transaction allows a Buying Station Manager to register smallholder farmers who want to apply for a loan, for instance from a financial institution.
Survey	The <i>Survey</i> transaction allows the Organizer to complete pre-designed questionnaires with the smallholder farmer on a variety of customer-defined topics.
Price	<p>A <i>Price</i> transaction allows an end user to set an online or offline price for agricultural products.</p> <p>Online prices are set on the back end through the Web interface and cannot be changed in the field through the mobile device, but offline prices can be changed from the mobile device by users with the proper authorizations.</p>
Loading Type 1	<p>A <i>Loading Type 1</i> transaction records the loading of the agricultural product onto the delivery truck at a Buying Station.</p> <p><i>Loading Type 1</i> transactions are related to <i>Offloading Type 1</i> transactions and are related to <i>Individual Buying</i> transactions.</p>

Transaction	Description
Offloading Type 1	<p>An <i>Offloading Type 1</i> transaction records the receipt of the agricultural product at a warehouse or central warehouse.</p> <p><i>Offloading Type 1</i> transactions are related to <i>Loading Type 1</i> transactions, which are also related to <i>Individual Buying</i> transactions.</p>
Processing Start	<p>The <i>Processing Start</i> transaction records the beginning of the processing of the agricultural product.</p>
Processing End	<p>The <i>Processing End</i> transaction records the completion of the processing of the agricultural product.</p>
Loading Type 2	<p>A <i>Loading Type 2</i> transaction records the loading of the agricultural product onto the delivery truck either at a Buying Station or at a warehouse.</p> <p><i>Loading Type 2</i> transactions are related to <i>Offloading Type 2</i> transactions but are not related to any <i>Individual Buying</i> transactions.</p>
Offloading Type 2	<p>An <i>Offloading Type 2</i> transaction records the receipt of the agricultural product at a warehouse or central warehouse.</p> <p><i>Offloading Type 2</i> transactions are related to <i>Loading Type 2</i> transactions but are not related to <i>Individual Buying</i> transactions.</p>

### i Note

Transaction names are fully customizable during the initial system setup.

**Parent topic:** [Installation and System Setup \[page 11\]](#)

## Related Information

[Application Installation \[page 11\]](#)

[General Settings \[page 12\]](#)

[Crop Selection \[page 13\]](#)

## 2.4.1 Registration Transaction Overview

*Registration* transactions enable Buying Station Managers to register new smallholder producers in the field or anywhere through a simple process in the Rural Sourcing Management mobile application.

*Registration* transactions can be used to add smallholder producers to the master data set, or to edit the data of any previously registered smallholder producer. *Registration* transactions capture personal details about each person.

Sample business context for using *Registration* transactions could include:

- The smallholder farmer and the Buying Station Manager meet face-to-face
- The smallholder farmer wants to deliver an agricultural product, but he or she is not yet registered in the system
- The smallholder farmer has changes or additional personal details to add

Configuration is set up by the system administrator through the Web interface in conjunction with SAP personnel, as described in the Administration Guide.

## Related Information

[Creating and Viewing a Registration](#)

### 2.4.1.1 Farmer Registration Configuration

*Farmer Registration* transactions enable Buying Station Managers to immediately register additional smallholder farmers through a simple process using the Rural Sourcing Management mobile application.

#### i Note

The name of this transaction is fully customizable and can be set during the initial system setup. The default term "Farmer Registration" is used for descriptive purposes.

*Farmer Registration* transactions deal only with static information that comes from the master data spreadsheet.

During initial system setup, you can set the following feature of the *Farmer Registration* transaction:

- *Farmer Code* -if you choose to include a Farmer Code, you have the following options:
  - *Automatically generated code* - you can set this so that a unique, random farmer code is automatically generated for each smallholder farmer registered.
  - *Scan button* - allows for a *Scan* button on *Registration* screen of the mobile application which can scan printed bar codes.

#### i Note

Unique codes can only be guaranteed if the end user does not change the code manually. If the end user changes the code manually or uses the *Scan* function, he or she must monitor and control the unique code allocation.

## 2.4.2 Individual Buying Transaction Overview

An *Individual Buying* transaction records the sale of agricultural products from a smallholder farmer to a buying station.

During an *Individual Buying* transaction, the smallholder farmer delivers a small amount of product to the buying station. A buying station is a central point in a region or village that is the first point of sale with direct contact with the smallholder farmer. A Buying Station Manager receives the sacks of agricultural product and records the transaction in the Rural Sourcing Management application. The application allows the Buying Station Manager to capture the volume of the delivery and record some quality indicators.

Sample business context for using *Individual Buying* transactions:

- The smallholder farmer and the Buying Station Manager meet face-to-face
- The smallholder farmer delivers product to a Buying Station and proves his or her identity by providing name, ID number, and so on
- The Buying Station Manager weighs and counts the sacks
- The Buying Station Manager can also conduct quality checks at this time

Configuration is set up by the system administrator through the Web interface in conjunction with SAP personnel, as described in the Administration Guide.

### Related Information

[Creating and Viewing an Individual Buying Transaction](#)

### 2.4.2.1 Individual Buying Configuration

An *Individual Buying* transaction records the sale of agricultural product from a smallholder farmer to a Buying Station.

#### i Note

The name of this transaction is fully customizable and can be set during the initial system setup. The default term "Individual Buying" is used for descriptive purposes.

During initial system setup, you can set the following features of the *Individual Buying* transaction:

- *Comments* - allows the user to add comments about the payment
- *Follow-up Transaction* - allows the user to indicate if a follow-up transaction is necessary
- *SMS Receipt* - enables the ability to issue a receipt through SMS

#### i Note

When the SMS Receipt feature is enabled, the recipient's mobile phone must be equipped with a SIM card to receive the receipts. In addition, the sender must understand that each SMS receipt sent may incur costs, depending on the conditions of the mobile provider.

- [Quality Indicators](#) - you can select or define quality indicators to be checked during this transaction

Quality Indicators

Quality Indicator	Entered as...
Color	free text
Defective "units"	percentage ( % )
Foreign objects	percentage ( % )
Insect damage	percentage ( % )
Micronaire	a positive decimal between 2.0 and 8.0
Moisture	percentage ( % )
Moldy units	percentage ( % )
Shape and Size	"unit"/kg
Staple	inches
Strength	grams per denier (g/den)
Trash	percentage ( % )

### **i** Note

The list of quality indicators is customizable. During the initial system setup, you can add any quality indicators that are necessary for your business process.

## 2.4.3 Payment Transaction Overview

A [Payment](#) transaction occurs when the smallholder farmer is paid for the product.

The [Payment](#) transaction usually follows the [Individual Buying](#) transaction. A Buying Station Manager can pay the smallholder farmer using either cash or mobile payments. The system displays previous payments and advances, so the smallholder farmer can be paid an appropriate amount, based on the current delivery and on former payments and advances.

Once a payment is captured, the system provides an optional SMS functionality. If SMS receipts are enabled, as described in [Mobile Settings and Preferences](#), the smallholder farmer can receive an SMS text message with a receipt of a payment.

Sample business context for using [Payment](#) transactions:

- The smallholder farmer and a Buying Station Manager can meet face-to-face or there is no meeting point
- The smallholder farmer requests payment after delivering agricultural products to a buying station

Configuration is set up by the system administrator through the Web interface in conjunction with SAP personnel, as described in the Administration Guide.

## Related Information

[Creating and Viewing a Payment Transaction](#)

### 2.4.3.1 Payment Configuration

A *Payment* transaction occurs when the farmer is paid for the product.

#### i Note

The name of this transaction is fully customizable and can be set during the initial system setup. The default term "Payment" is used for descriptive purposes.

During initial system setup, you will need to select payment types. The available payment types are:

- *Cash*
- *Bank* - captures payment type only
- *Mobile* - captures payment type only

#### i Note

Triggered mobile money payments are currently only available in Uganda. A connection between the Rural Sourcing Management application and a mobile money provider has been implemented in Uganda. This connection includes the triggering and administration of mobile money payments with the application, interfacing to a concrete mobile payment provider.

You can also set the following features of the *Payment* transaction:

- *Payment calculations* - you can configure the Payment transaction to take into consideration advances and the value of buying transactions
- *Comments* - allows the user to add comments about the payment
- *SMS Receipt* - enables the ability to issue a receipt through SMS

#### i Note

When the SMS Receipt feature is enabled, the recipient's mobile phone must be equipped with a SIM card to receive the receipts. In addition, the receiver must understand that each SMS receipt may incur costs, depending on the conditions of the mobile provider.

### 2.4.4 Advance Transaction Overview

An *Advance* transaction enables a smallholder farmer to receive money for a future delivery of agricultural produce.

*Advance* transactions allow the Buying Station Manager to track all advance payments that have been made. The *Advance* transaction also allows the Buying Station Manager to separate and overview different kinds of

cash flows. For instance, he or she can look at payments that do not initially refer to a specific counter value but that will be linked to a counter value at a later date.

The Rural Sourcing Management application can record information about the *Advance* transaction, such as the date, the name of the smallholder farmer, amount, payment type, and comments. If SMS receipts are enabled, as described in [Mobile Settings and Preferences](#), the smallholder farmer can receive an SMS text message with a receipt of a payment.

Sample business context for using *Advance* transactions:

- The smallholder farmer and the Buying Station Manager meet face-to-face
- The smallholder farmer requests an advance payment for a future delivery

Configuration is set up by the system administrator through the Web interface in conjunction with SAP personnel, as described in the Administration Guide.

## Related Information

[Creating and Viewing an Advance Transaction](#)

### 2.4.4.1 Advance Configuration

An *Advance* transaction enables individuals to receive money for a future delivery of agricultural product.

#### i Note

The name of this transaction is fully customizable and can be set during the initial system setup. The default term "Advance" is used for descriptive purposes.

During initial system setup, you will need to select *Advance* payment types. The available *Advance* payment types are:

- *Cash*
- *Bank* - captures payment type only
- *Mobile* - captures payment type only

#### i Note

Triggered mobile money payments are currently only available as a prototype in Uganda. A connection between the Rural Sourcing Management application and a mobile money provider has been implemented in Uganda. This connection includes the triggering and administration of mobile money payments with the application, interfacing to a concrete mobile payment provider.

You can also set the following features of the *Advance* transaction:

- *Comments* - allows the user to add comments about the advance
- *SMS Receipt* - enables the ability to issue a receipt through SMS

### i Note

When the SMS Receipt feature is enabled, the recipient's mobile phone must be equipped with a SIM card to receive the receipts. In addition, the receiver must understand that each SMS receipt may incur costs, depending on the conditions of the mobile provider.

## 2.4.5 Loan Application Transaction Overview

The *Loan Application* transaction allows a Buying Station Manager to register smallholder farmers who want to apply for a loan directly from a lender.

The Buying Station Manager uses the Rural Sourcing Management application to record the name of the smallholder farmer and the desired lender. The Buying Station Manager can log into the Web interface to prepare a report to give to the lender. The report initially includes a full list of smallholder farmers who want a loan. Then, during the application process, the system administrator can prepare a more detailed report that includes a work record for each specific smallholder farmer to support the loan application.

Sample business context for using *Loan Application* transactions:

- The smallholder farmer and the Buying Station Manager meet face-to-face
- The smallholder farmer wants to have access to financial products and needs support
- The farmer requests a loan from a specific lender
- The Buying Station Manager helps to establish a connection with the selected lender
- The Buying Station Manager can use the Web interface to prepare a report for the lender with the smallholder farmer's work history records in support of the application

Configuration is set up by the system administrator through the Web interface in conjunction with SAP personnel, as described in the Administration Guide.

### Related Information

[Creating and Viewing a Loan Application](#)

## 2.4.5.1 Loan Application Configuration

The *Loan Application* transaction allows a Buying Station Manager to register smallholder farmers who want to apply for a loan directly from various financial institutions.

### i Note

The name of this transaction is fully customizable and can be set during the initial system setup. The default term "Loan Application" is used for descriptive purposes.

During initial system setup, you will need to define:

- *Loan Products* - you can define an unlimited number of loan products
- *Financial Institutions* - you can define all application financial institutions. These options then display on the Rural Sourcing Management mobile application and are considered in the financial reporting

## 2.4.6 Survey Transaction Overview

The *Survey* transaction allows the Organizer to complete pre-designed questionnaires with the smallholder farmer on a variety of customer-defined topics.

The Organizer can meet with the smallholder farmer to conduct a survey. Survey questions are pre-defined and are created by your system administrator during initial system setup. The Organizer enters all survey responses into the Rural Sourcing Management mobile application.

The purpose of surveys is to collect additional information from the smallholder farmer that is not part of the registration information or that is information that could change on a regular basis.

### i Note

Surveys will display on the mobile device in the language they were created in, regardless of the language selected by the user for the rest of the Rural Sourcing Management screens.

Sample business context for using *Survey* transactions:

- The Organizer can conduct a face-to-face survey with the smallholder farmer
- Surveys are pre-defined and can cover a single topic or multiple topics, for example:
  - Household information
  - Personal information
  - Land size inquiries
  - Crop size (number of trees, and so on)
  - Agricultural practices
  - Child labor practices

Configuration is set up by the system administrator through the Web interface in conjunction with SAP personnel, as described in the Administration Guide.

## Related Information

[Conducting and Viewing a Survey](#)

## 2.4.6.1 Survey Configuration

The *Survey* transaction allows the Organizer to complete pre-designed questionnaires with the smallholder farmer on a variety of customer-defined topics.

### i Note

The name of this transaction is fully customizable and can be set during the initial system setup. The default term "Survey" is used for descriptive purposes.

During initial system setup, you have the option to set up smallholder farmer surveys that conform to your business needs. For instance, you may want to design a survey that inquires about the size of the smallholder farmer's land, the number of trees in the fields, and so on, so that you can make informed decisions about future business. SAP provides a survey template in an Excel spreadsheet. The entries you make on the spreadsheet define the questions and also define the logic flow of the survey. Once you have completed the Excel spreadsheet for your desired surveys, SAP personnel will upload it into the system and it will be ready for use.

For each question, you can designate the following items:

Spreadsheet Field	Description
Short title	Text to be used on the Overview screen
Question	Full text of the question
Unit	Appears in parenthesis behind the question
Recurrence group ID	Set of question with the same ID can be answered multiple times
Required	Designate the question as required ( <i>yes</i> ) or not required ( <i>no</i> )
Input field type	Select one: <ul style="list-style-type: none"><li>• date picker</li><li>• person picker</li><li>• number picker</li><li>• text field</li><li>• drop-down menu</li><li>• radio button group</li></ul>
Value restrictions	Select one: <ul style="list-style-type: none"><li>• any value</li><li>• contained in enumeration</li><li>• positive decimal</li></ul>
Enumeration values	Valid for questions defined with a value restriction of <i>contained in enumeration</i> . Examples of this would be the months of the year, or relationship statuses.
Value type	This can be any value that you define in regard to the corresponding question.
No answer option title	Title for the option indicating no selection
Min value for range	This is valid only for questions defined with a value type of <i>within range</i>
Max range value	This is valid only for questions defined with a value type of <i>within range</i>

Spreadsheet Field	Description
Show depending on field	Code of the field whose value to examine
Show if value of related field is any of...	The field will be shown if the related field's value is contained in this list
Icon	The icon to be displayed in front of the question
Filter	You can define one field that is offered as a filter. You can only define one.
Position in Overview Item	Definition of the position of the question or item to be displayed on the Overview screen
View Restriction	Show the survey only to people who meet specific conditions

#### → Tip

Keep in mind that the surveys will display on the user's mobile application in the language you create them in, regardless of the language selected by the user on his or her mobile device. Therefore, it is recommended that you create the survey in a language that is most common for your users in the field.

## 2.4.7 Offline Price Transaction Overview

An *Offline Price* transaction allows you to set an offline price for agricultural products.

The Rural Sourcing Management system allows for both online pricing and offline pricing. Online prices are set through the Web interface and cannot be changed using the mobile application, but offline prices can be set and changed from the mobile application.

With the *Offline Price* transactions, the Buying Manager can calculate the value of the agricultural product that is delivered by the smallholder farmer.

#### i Note

Online prices are set for the whole organization. Offline prices are only set for the particular mobile device on which the Rural Sourcing Management mobile application is used.

Sample business context for using *Price* transactions:

- An organization or a buying station wants to have a pre-set price for the agricultural product that the Buying Station Manager buys from the smallholder farmer, or an organization wants to change the price for the agricultural product from the office
- The organization wants to set different prices for the different agricultural products and certificates
- Payment to the smallholder farmer can be calculated based on this price per unit of the product and the amount the smallholder farmer delivers

Configuration is set up by the system administrator through the Web interface in conjunction with SAP personnel, as described in the Administration Guide.

## Related Information

[Creating and Editing a Price Transaction](#)

### 2.4.7.1 Price Configuration

A *Price* transaction allows you to set an online or offline price for agricultural products.

#### i Note

The name of this transaction is fully customizable and can be set during the initial system setup. The default term "Price" is used for descriptive purposes.

During the initial system setup, you can set the following features of the *Price* transaction:

- *Number of Products* - allows the user to enter the number of units for which the price should be set
- *Online Price* - online prices can only be set from the Web interface and are set for the whole organization
- *Offline Price* - offline prices are set only for a particular phone on which the Rural Sourcing Management application is to be used and are set initially on the Web interface, but can be changed directly on the phone

### 2.4.8 Loading Type 1 Transaction Overview

A *Loading Type 1* transaction records the loading of the agricultural product onto the truck for delivery after several *Individual Buying* transactions are completed at a buying station.

*Loading Type 1* transactions are related to *Offloading Type 1* transactions and are also related to *Individual Buying* transactions, allowing for more traceability of each *Individual Buying* transaction.

#### i Note

*Loading Type 1* transactions can only be recorded at a buying station. For loading taking place at a warehouse, use *Loading Type 2* transactions.

The Rural Sourcing Management mobile application allows the Buying Station Manager to record each sack or unit of product that is loaded onto the truck at the buying station. With *Loading Type 1* transactions, the Buying Station Manager can select each *Individual Buying* transaction that has already been recorded and will be loaded onto the truck. At that time, he or she then can re-enter the sack weight, the number on each sack, the current quality for the product, and the destination.

Sample business context for using *Loading Type 1* transactions:

- A buying station has either collected a sufficient amount of agricultural product to bring to a warehouse, or a delivery truck arrives at the buying station to collect the agricultural product
- The Buying Station Manager wants to track all sacks that are loaded onto the truck
- The Buying Station Manager wants to know the overall number of sacks, the weight, and the current quality of the agricultural product that has been loaded onto the truck

Configuration is set up by the system administrator through the Web interface in conjunction with SAP personnel, as described in the Administration Guide.

## Related Information

[Creating and Viewing a Loading Type 1 Transaction](#)

### 2.4.8.1 Loading Type 1 Configuration

A *Loading* transaction records the loading of the agricultural product onto the truck for delivery after an *Individual Buying* transaction is completed at a Buying Station.

#### i Note

The name of this transaction is fully customizable and can be set during the initial Pilot setup. The default term "Loading Type 1" is used for descriptive purposes.

*Loading Type 1* transactions are related to *Individual Buying* transactions and are also related to *Offloading Type 1* transactions.

You can set the following features of the *Loading Type 1* transaction:

- *Destination* - you can either define a pre-selected destination or allow users to choose from a list
- *Comments* - allows the user to add comments about the *Loading Type 1* transaction
- *Quality Indicators* - you can select or define quality indicators to be checked during this transaction

Quality Indicators

Quality Indicator	Entered as...
Color	free text
Defective "units"	percentage ( % )
Foreign objects	percentage ( % )
Insect damage	percentage ( % )
Micronaire	a positive decimal between 2,0 and 8,0
Moisture	percentage ( % )
Moldy units	percentage ( % )
Shape and Size	"unit"/kg
Staple	inches

Quality Indicator	Entered as...
Strength	grams per denier (g/den)
Trash	percentage ( % )

### **i** Note

The list of quality indicators is customizable. During the initial Pilot setup, you can add any quality indicators that are necessary for your business process.

## 2.4.9 Offloading Type 1 Transaction Overview

An *Offloading* transaction records the receipt of the agricultural product at a warehouse or regional center.

*Offloading Type 1* transactions are related to *Loading Type 1* transactions, which are related to *Individual Buying* transactions.

The offloading is captured by a Warehouse Manager or Regional Center Manager. Once a truck arrives at the warehouse or regional center, the manager first selects the corresponding *Loading* transaction from the system. This allows an additional comparison and control of the weight and quality of the product.

The manager uses the Rural Sourcing Management application to compare and record information about the delivery, such as the product destination, driver's information, delivery amount, weight, and quality, per assigned quality indicator controls for the delivered product.

Sample business context for using *Offloading Type 1* transactions:

- A truck loaded with an agricultural product arrives at a warehouse or regional center
- The delivery is counted and weighed
- Delivery data is compared with the loading data
- Applicable quality indicators are checked

Configuration is set up by the system administrator through the Web interface in conjunction with SAP personnel, as described in the Administration Guide.

### Related Information

[Creating and Viewing an Offloading Type 1 Transaction](#)

## 2.4.9.1 Offloading Type 1 Configuration

An *Offloading* transaction records the receipt of the agricultural produce at a central warehouse that can be found in larger cities.

### i Note

The name of this transaction is fully customizable and can be set during the initial Pilot setup. The default term "Offloading Type 1" is used for descriptive purposes.

*Offloading Type 1* transactions are related to *Loading Type 1* transactions and are also related to *Buying* transactions.

You can set the following features of the *Offloading Type 1* transaction:

- *Comments* - allows the user to add comments about the *Offloading Type 1* transaction
- *Quality Indicators* - you can select or define quality indicators to be checked during this transaction

Quality Indicators

Quality Indicator	Entered as...
Color	free text
Defective "units"	percentage ( % )
Foreign objects	percentage ( % )
Insect damage	percentage ( % )
Micronaire	a positive decimal between 2,0 and 8,0
Moisture	percentage ( % )
Moldy units	percentage ( % )
Shape and Size	"unit"/kg
Staple	inches
Strength	grams per denier (g/den)
Trash	percentage ( % )

### i Note

The list of quality indicators is customizable. During the initial Pilot setup, you can add any quality indicators that are necessary for your business process.

## 2.4.10 Processing Start Overview

The *Processing Start* transaction records the beginning of the processing of an agricultural product.

This transaction indicates the start of any processing necessary for agricultural products in relation to quality control. This would include, for instance, processing to reduce moisture or remove hulls. The *Processing Start* transaction allows the Buying Station Manager or Warehouse Manager to record the start of the processing function in the Rural Sourcing Management mobile application. They can record the date, location, and product type to be processed, along with other details such as the number of sacks, weight, and the product quality.

### i Note

The product *Processing Start* transaction is connected to a *Processing End* transaction but not to any other transaction (buying, loading, or offloading). It is recorded in the system without direct reference to any other transaction.

Sample business context for using *Processing Start* transactions:

- An agricultural product is delivered to a buying station and is to be processed at the buying station, at the warehouse, or at a later stage
- The processing changes the characteristics of the original delivered product, such as the weight, quality, or bagging
- The time and the characteristic changes are recorded to ensure the integrity of the overview of the whole value-chain

Configuration is set up by the system administrator through the Web interface in conjunction with SAP personnel, as described in the Administration Guide.

## Related Information

[Creating and Viewing a Processing Start Transaction](#)

### 2.4.10.1 Processing Start Configuration

The *Processing Start* transaction records the beginning of the processing of unprocessed agricultural product.

### i Note

The name of this transaction is fully customizable and can be set during the initial Pilot setup. The default term "Processing Start" is used for descriptive purposes.

You can set the following features of the *Processing Start* transaction:

- *Comments* - allows the user to add comments about the processing
- *Location* - you can either define a pre-selected location or allow users to choose from a list
- *Quality Indicators* - you can select or define quality indicators to be checked during this transaction

## Quality Indicators

Quality Indicator	Entered as...
Color	free text
Defective "units"	percentage ( % )
Foreign objects	percentage ( % )
Insect damage	percentage ( % )
Micronaire	a positive decimal between 2,0 and 8,0
Moisture	percentage ( % )
Moldy units	percentage ( % )
Shape and Size	"unit"/kg
Staple	inches
Strength	grams per denier (g/den)
Trash	percentage ( % )

## 2.4.11 Processing End Overview

The *Processing End* transaction records the completion of the processing of an agricultural product.

This transaction indicates the end of any processing necessary for agricultural products in relation to quality control and is always related to a *Processing Start* transaction. The *Processing End* transaction allows the Buying Station Manager or Warehouse Manager to record the end of the processing transaction in the Rural Sourcing Management mobile application. They can record the date and location of the processing end. At this step, the manager records the number of sacks, the weight, and the current quality of the product. These entries will be compared to the recorded date in the *Processing Start* step.

### i Note

The product *Processing End* transaction is connected to a *Processing Start* transaction but not to any other transaction (buying, loading, or offloading). It is recorded in the system without direct reference to any other transaction.

Sample business context for using *Processing End* transactions:

- The agricultural product has been processed and will be re-entered in the value-chain (loading/offloading transaction process)
- The processing changes the characteristics of the original delivered product, such as the weight, quality, or bagging
- The time and the characteristic changes are recorded to ensure the integrity of the overview of the whole value-chain

### i Note

The time and changes of the processed product should be recorded in comparison to the record made at the start of processing.

Configuration is set up by the system administrator through the Web interface in conjunction with SAP personnel, as described in the Administration Guide.

## Related Information

[Creating and Viewing a Processing End Transaction](#)

### 2.4.11.1 Processing End Configuration

The *Processing End* transaction records the completion of the processing of unprocessed agricultural product.

### i Note

The name of this transaction is fully customizable and can be set during the initial Pilot setup. The default term "Processing End" is used for descriptive purposes.

You can set the following features of the *Processing End* transaction:

- *Location* - you can either define a pre-selected location or allow users to choose from a list
- *Comments* - allows the user to add comments about the *Processing End* transaction
- *Quality Indicators* - you can select or define quality indicators to be checked during this transaction

Quality Indicators

Quality Indicator	Entered as...
Color	free text
Defective "units"	percentage ( % )
Foreign objects	percentage ( % )
Insect damage	percentage ( % )
Micronaire	a positive decimal between 2,0 and 8,0
Moisture	percentage ( % )
Moldy units	percentage ( % )
Shape and Size	"unit"/kg

Quality Indicator	Entered as...
Staple	inches
Strength	grams per denier (g/den)
Trash	percentage ( % )

## 2.4.12 Loading Type 2 Transaction Overview

A *Loading Type 2* transaction records the loading of the agricultural product onto the delivery truck either at a buying station or at a warehouse.

*Loading Type 2* transactions are related to *Offloading Type 2* transactions but are not related to any *Individual Buying* transactions.

Buying Station Managers or Warehouse Managers use this transaction to manage and record the destination of loading happening at the buying station or warehouse. He or she can record the load weight, the number of sacks, the destination, and the applicable quality indicators.

### → Tip

For better traceability of *Individual Buying* transactions, it is recommended to use *Loading Type 1* transactions when the loading takes place at a buying station.

Sample business context for using *Loading Type 2* transactions:

- The agricultural products at a Buying Station or a warehouse are to be collected and delivered to another warehouse or regional center
- The Buying Station Manager or Warehouse Manager wants to track sacks and weight that are loaded onto the truck
- This step allows the company to track several loading steps that happen with the load until the product reaches the warehouse or regional center

Configuration is set up by the system administrator through the Web interface in conjunction with SAP personnel, as described in the Administration Guide.

## Related Information

[Creating and Viewing a Loading Type 2 Transaction](#)

## 2.4.12.1 Loading Type 2 Configuration

A *Loading Type 2* transaction records the loading of the agricultural product onto the delivery truck either at a Buying Station or at a regional warehouse.

### i Note

The name of this transaction is fully customizable and can be set during the initial Pilot setup. The default term "Loading Type 2" is used for descriptive purposes.

*Loading Type 2* transactions are related to *Offloading Type 2* transactions but are not related to *Individual Buying* transactions.

You can set the following features of the *Loading Type 2* transaction:

- *Destination* - you can either define a pre-selected destination or allow users to choose from a list
- *Comments* - allows the user to add comments about the *Loading Type 2* transaction
- *Quality Indicators* - you can select or define quality indicators to be checked during this transaction

Quality Indicators

Quality Indicator	Entered as...
Color	free text
Defective "units"	percentage ( % )
Foreign objects	percentage ( % )
Insect damage	percentage ( % )
Micronaire	a positive decimal between 2,0 and 8,0
Moisture	percentage ( % )
Moldy units	percentage ( % )
Shape and Size	"unit"/kg
Staple	inches
Strength	grams per denier (g/den)
Trash	percentage ( % )

### i Note

The list of quality indicators is customizable. During the initial Pilot setup, you can add any quality indicators that are necessary for your business process.

## 2.4.13 Offloading Type 2 Transaction Overview

An *Offloading Type 2* transaction records the receipt of the agricultural product at a warehouse or regional center.

*Offloading Type 2* transactions are related to *Loading Type 2* transactions but are not related to *Individual Buying* transactions.

The offloading is captured by a Warehouse Manager or Regional Manager. Once a truck arrives at the warehouse or regional center, you select the corresponding *Loading Type 2* transaction from the system. This allows an additional comparison and control of the weight and quality of the product.

The manager uses the Rural Sourcing Management application to compare and record information about the delivery, such as the product destination, driver's information, delivery amount, weight, and quality, per assigned quality indicator controls for the delivered product.

Sample business context for using *Offloading Type 2* transactions:

- A truck loaded with an agricultural product arrives at a warehouse or regional center
- The delivery is counted and weighed
- Delivery data is compared to the loading data
- Applicable quality indicators are checked

Configuration is set up by the system administrator through the Web interface in conjunction with SAP personnel, as described in the Administration Guide.

### Related Information

[Creating and Viewing a Offloading Type 2 Transaction](#)

#### 2.4.13.1 Offloading Type 2 Configuration

An *Offloading* transaction records the receipt of the agricultural produce at a central warehouse that can be found in larger cities.

##### i Note

The name of this transaction is fully customizable and can be set during the initial Pilot setup. The default term "Offloading Type 2" is used for descriptive purposes.

*Offloading Type 2* transactions are related to *Loading Type 2* transactions but are not related to *Buying* transactions.

You can also set the following feature of the *Offloading Type 2* transaction:

- *Comments* - allows the user to add comments about the *Offloading Type 2* transaction
- *Quality Indicators* - you can select or define quality indicators to be checked during this transaction

## Quality Indicators

Quality Indicator	Entered as...
Color	free text
Defective "units"	percentage ( % )
Foreign objects	percentage ( % )
Insect damage	percentage ( % )
Micronaire	a positive decimal between 2,0 and 8,0
Moisture	percentage ( % )
Moldy units	percentage ( % )
Shape and Size	"unit"/kg
Staple	inches
Strength	grams per denier (g/den)
Trash	percentage ( % )

### i Note

The list of quality indicators is customizable. During the initial Pilot setup, you can add any quality indicators that are necessary for your business process.

## 2.4.14 Transaction Synchronization Overview

*Transaction synchronization* is the process of uploading your saved transactions from your mobile device to the central database and downloading any updates from the central database to your mobile device.

On your mobile device, your *Sync List* contains all of the transactions you have saved locally. Transaction data is stored offline on the mobile device until the mobile user initiates a *transaction synchronization*. At that time, the stored transaction data from the mobile device *Sync List* is uploaded to the system database, and at the same time, any master data updates are downloaded to the user's mobile device.

*Transaction synchronization* requires a stable Internet connection.

### i Note

It is very important to synchronize frequently. Data that has not been sent to the database is only saved locally. If the mobile device is broken, lost or stolen, all the data in that mobile device's *Sync List* will be lost. Synchronization also ensures that the mobile device has the latest master data updates downloaded.

# Related Information

[Transaction Synchronization](#)

## 3 Master Data

As part of the initial Rural Sourcing Management system setup, you must create your master data set. This is completed on the back end by your system administrator with input and direction from SAP personnel.

The key master data spreadsheet contains four sheets: *Organizations*, *Persons*, *OrgTypes* and *OrgRoles*. Before you can define all necessary items for these data sheets, you have to first carefully layout your company's hierarchy. For an example, see [Company Hierarchy \[page 38\]](#).

### i Note

The transaction downloads and master data downloads and uploads described in [Management Transactions \[page 48\]](#) assumes that the company hierarchy and initial master data is correctly and completely set up prior to initiation.

Full details on master data setup can be found in the Administration Guide.

#### [Company Hierarchy \[page 38\]](#)

A key component of the master data setup is the definition of your company hierarchy.

#### [Initial Master Data Setup \[page 39\]](#)

The initial master data setup consists of filling in the *Organizations* sheet and the *Persons* sheet on the master data spreadsheet. This is completed on the back end by your system administrator with input and direction from SAP personnel.

### 3.1 Company Hierarchy

A key component of the master data setup is the definition of your company hierarchy.

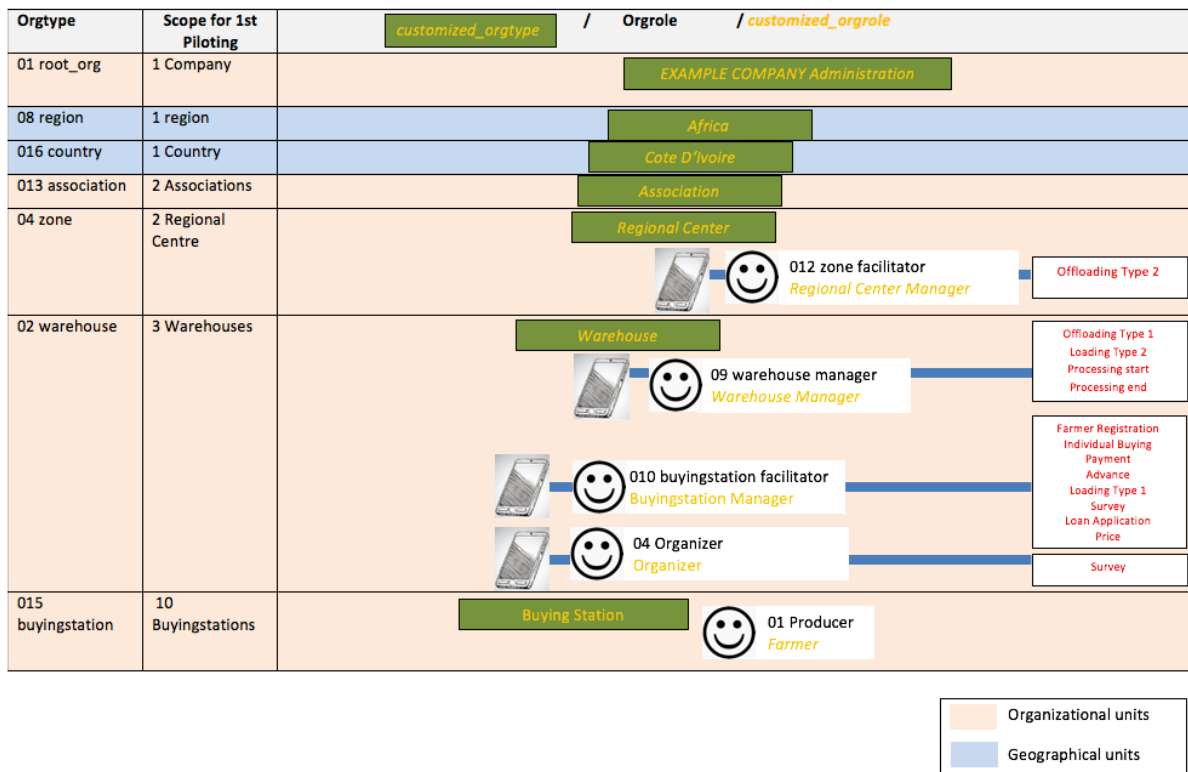
This is done internally by your system administrator in conjunction with SAP personnel. Because the hierarchy is closely related to how Rural Sourcing Management runs, it is very important that the hierarchy is built as close to your company structure as possible.

You can define your company hierarchy in one of the following ways:

- Geographical - this includes geographical units such as countries, regions, parishes, and so on
- Organizational - this includes organizational units such as buying stations, warehouses, regional centers, and so on
- Mix (geographical and organizational together)
- Parallel (one geographical and one organizational)

The default hierarchy is a mixed hierarchy based on the sample shown below.

## ORGANIZATIONAL/GEOGRAPHICAL - HIERARCHY



The sample displays representative names and terms. All terms in yellow are just examples and can be custom-defined. The smiley face icons represent user roles and the red text shows examples of what each role can capture. The cell phones next to a smiley face indicate that the end user is using the mobile application on a smart phone in the field to capture transactions.

Parent topic: [Master Data \[page 38\]](#)

## Related Information

[Initial Master Data Setup \[page 39\]](#)

## 3.2 Initial Master Data Setup

The initial master data setup consists of filling in the *Organizations* sheet and the *Persons* sheet on the master data spreadsheet. This is completed on the back end by your system administrator with input and direction from SAP personnel.

SAP provides a Master Data Template in an Excel spreadsheet. It is not possible to complete this spreadsheet until you have defined your company hierarchy. See [Company Hierarchy \[page 38\]](#) for details.

To complete the initial master data setup, you must complete the spreadsheets for *Organizations* and for *Persons*. For details, see the appropriate section:

- [Master Data - Organizations \[page 40\]](#)
- [Master Data - Persons \[page 41\]](#)

**Parent topic:** [Master Data \[page 38\]](#)

## Related Information

[Company Hierarchy \[page 38\]](#)

### 3.2.1 Master Data - Organizations

The *Organizations* sheet of the master data Excel file is completed by your system administrator with an SAP representative.

Use this sheet to define all organizations and all levels that are part of your business hierarchy. Items to configure on this spreadsheet include all organizational units applicable to your business, such as buying stations, warehouses, regional centers, and so on. You need to customize the spreadsheet to match your business case and your defined company hierarchy.

You must add all defined certifications to the *Organizations* sheet but it is not necessary to add the product types. For details on certifications and product types, see [Crop Selection \[page 13\]](#).

#### → Tip

Some of the fields in the *Persons* sheet are dependent on entries on this sheet. You must completely fill in the *Organizations* sheet before moving to the *Persons* sheet.

See below for an example of a completed *Organizations* sheet for master data.

cid	id	org	orgname	orgtype	org	parent_orgname	parent_or	part	village	address	zipc	phone	email	longitude	latitude	oper	remark	creation_date				
		add	Example Company	root_org	1000													active	2016-12-06			
		add	Africa	region	1001	Example Company	root_org											active	2016-12-06			
		add	Côte d'Ivoire	country	1002	Africa	region											active	2016-12-06			
		add	Association I	association	1003	Côte d'Ivoire	country											active	2016-12-06			
		add	Regional Centre A	zone	1004	Association I	association	1003	Katadji	Main Road	12345	+						regionalcentreA@ab	4.454216003	5.66450162	active	2016-12-06
		add	Warehouse ONE	warehouse	1005	Regional Centre A	zone	1004	Béédi	Long Street	12355	+						Warehouse1@abc.co	4.58198547	5.6378526	active	2016-12-06
		add	Warehouse TWO	warehouse	1006	Regional Centre A	zone	1004	Sikensi	Mountain S	12458	+						Warehouse2@abc.co	4.57853225	5.66176845	active	2016-12-06
		add	Buyingstation 1	buyingstation	1007	Warehouse ONE	warehouse	1005													active	2016-12-06
		add	Buyingstation 2	buyingstation	1008	Warehouse ONE	warehouse	1005													active	2016-12-06
		add	Buyingstation 3	buyingstation	1009	Warehouse ONE	warehouse	1005													active	2016-12-06
		add	Buyingstation 4	buyingstation	1010	Warehouse TWO	warehouse	1006													active	2016-12-06
		add	Buyingstation 5	buyingstation	1011	Warehouse TWO	warehouse	1006													active	2016-12-06
		add	Buyingstation 6	buyingstation	1012	Warehouse TWO	warehouse	1006													active	2016-12-06
		add	Association II	association	1013	Côte d'Ivoire	country														active	2016-12-06
		add	Regional Centre B	zone	1014	Association II	association	1013	Dabou	Lagune Stre	5478	+						RegionalCentreB@al	4.35333252	5.31797051	active	2016-12-06
		add	Warehouse THREE	warehouse	1015	Regional Centre B	zone	1014	Songon Agban	Cliff Street	5482	+						Warehouse3@abc.co	4.25170898	5.31523574	active	2016-12-06
		add	Buyingstation 7	buyingstation	1016	Warehouse THREE	warehouse	1015													active	2016-12-06
		add	Buyingstation 8	buyingstation	1017	Warehouse THREE	warehouse	1015													active	2016-12-06
		add	Buyingstation 9	buyingstation	1018	Warehouse THREE	warehouse	1015													active	2016-12-06
		add	Buyingstation 10	buyingstation	1019	Warehouse THREE	warehouse	1015													active	2016-12-06
		add	UTZ	certifier	2000																active	2016-12-06
		add	Fairtrade	certifier	2001																active	2016-12-06
		add	Rainforest Alliance	certifier	2002																active	2016-12-06

Sample Master Data - Organizations Sheet

### 3.2.2 Master Data - Persons

The *Persons* sheet of the master data Excel file is completed by your system administrator with an SAP representative.

Use this sheet to define all people that are part of the Rural Sourcing Management system in any way. Whether a person records transactions or not, if he or she is part of your company hierarchy, he or she must be listed on the *Persons* sheet and you must show the appropriate registration for that person. For details on company hierarchy, see [Company Hierarchy \[page 38\]](#).

#### i Note

Some of the fields in the *Persons* sheet are dependent on entries in the *Organizations* sheet. Therefore, you must complete the *Organizations* sheet before you can complete this sheet.

For example, an **admin** would be connected to the **root\_org** in the master data *Persons* sheet. The **org roles**, **org type**, and **org code** for that admin should all refer back to the master data *Organizations* sheet input.

Remember that if a person is attached to an organization, that person can only see from that organization and below in the company hierarchy organizational chart. Smallholder farmers are at the lowest level of the Rural Sourcing Management system. They only have the role of certifier and are attached to buying stations.

See below for an example of a completed *Persons* sheet for master data.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF	AG	AH	AI	AJ	AK		
					firstnam	lastname	ducer	staff_co	gender	phone	email	marital_sta	date_of_bi	d	date_of_regist			lucer_or	ducer_o	ducer_o	ducer_o	ducer_o	ducer_o	ducer_o	ducer_o	ducer_o	ducer_o	ducer_o	ducer_o	ducer_o	ducer_o	ducer_o	ducer_o	ducer_o	ducer_o	ducer_o	ducer_o	ducer_o	
1	add	Example	Regional Centre Manager	RM123	MALE				02			SINGLE	1974-01-07	2017-01-01																									
2	add	Celine	C	RM124	FEMALE					Celine.C@gmail.com	MARRIED	1978-03-12	2017-01-01																										
3	add	David	D	RM125	MALE							SINGLE	1978-05-13	2017-01-01																									
4	add	Eva	E	RM126	FEMALE							MARRIED	1969-05-03	2017-01-01																									
5	add	Example	Warehouse Manager	WM234	MALE							SINGLE	1965-05-13	2017-01-01																									
6	add	Fred	F	WM235	MALE							MARRIED	1975-01-01	2017-01-01																									
7	add	Gina	G	WM236	FEMALE					GinaG@yahoo.com	SINGLE	1975-03-11	2017-01-01																										
8	add	Henry	H	WM237	MALE							MARRIED	1968-11-19	2017-01-01																									
9	add	Ivan	I	WM238	MALE							SINGLE	1987-08-27	2017-01-01																									
10	add	Janet	J	WM239	FEMALE							MARRIED	1990-09-04	2017-01-01																									
11	add	Example	Buyingstation Manager	BM345	FEMALE							SINGLE	1968-11-02	2017-01-01																									
12	add	Kyla	K	BM346	MALE					Kyla-K@yahoo.com	MARRIED	1987-08-27	2017-01-01																										
13	add	Leo	L	BM347	MALE							SINGLE	1990-09-04	2017-01-01																									
14	add	Martha	M	BM348	FEMALE					M@Martha.com	MARRIED	1958-12-09	2017-01-01																										
15	add	Norman	N	BM349	MALE							SINGLE	1973-02-16	2017-01-01																									
16	add	Oliver	O	BM350	MALE							MARRIED	1984-08-14	2017-01-01																									
17	add	Patricia	P	BM351	FEMALE							SINGLE	1977-03-01	2017-01-01																									
18	add	Quentin	Q	BM352	MALE							MARRIED	1960-07-05	2017-01-01																									
19	add	Rose	R	BM353	FEMALE							SINGLE	1963-07-16	2017-01-01																									
20	add	Example	Organizer	O456	FEMALE							MARRIED	1972-05-08	2017-01-01																									
21	add	Tom	T	O457	MALE							SINGLE	1978-04-05	2017-01-01																									
22	add	Uther	U	O458	MALE							MARRIED	1964-08-06	2017-01-01																									
23	add	Valentin	V	O459	MALE							SINGLE	1958-02-02	2017-01-01																									
24	add	William	W	O460	MALE							MARRIED	1988-10-08	2017-01-01																									
25	add	Xavier	X	O461	MALE							SINGLE	1987-06-04	2017-01-01																									
26	add	Yvain	Y	O462	MALE							MARRIED	1990-08-13	2017-01-01																									
27	add	Zoey	Z	O463	FEMALE							SINGLE	1970-08-18	2017-01-01																									
28	add	Albert	AB	O464	MALE							MARRIED	1979-04-26	2017-01-01																									
29	add	Example	Farmer	12345	MALE							SINGLE	2017-01-01	2017-01-01													Buyingstat	buyingstat	1007		certifier	UTZ	certifier			2000			
30	add	Agata	AC	12346	FEMALE							MARRIED	1990-02-18	2017-01-01													Buyingstat	buyingstat	1008		certifier	UTZ	certifier			2000			
31	add	Adam	AD	12347	FEMALE							SINGLE	1966-06-12	2017-01-01													Buyingstat	buyingstat	1009		certifier	UTZ	certifier			2000			
32	add	Evelin	AE	12348	FEMALE							MARRIED	1976-08-12	2017-01-01													Buyingstat	buyingstat	1010		certifier	UTZ	certifier			2000			
33	add	Fred	AF	12349	MALE							SINGLE	1989-09-17	2017-01-01													Buyingstat	buyingstat	1011		certifier	UTZ	certifier			2000			
34	add	Oliver	AG	12350	MALE							MARRIED	1964-03-14	2017-01-01													Buyingstat	buyingstat	1012		certifier	UTZ	certifier			2000			
35	add	Jack	AH	12351	MALE							SINGLE	1982-09-18	2017-01-01													Buyingstat	buyingstat	1007		certifier	UTZ	certifier			2000			
36	add	Chloe	AI	12352	FEMALE							MARRIED	2017-01-01	2017-01-01													Buyingstat	buyingstat	1006		certifier	UTZ	certifier			2000			
37	add	Mia	AJ	12353	FEMALE							SINGLE	1982-11-16	2017-01-01													Buyingstat	buyingstat	1009		certifier	UTZ	certifier			2000			

Sample Master Data - Persons Sheet

## 4 User Roles

As with most applications, user permissions within the Rural Sourcing Management application are based on the user role assigned to the person logged into the system.

There are some basic user roles within the Rural Sourcing Management system:

- *Regional Center Manager* - The Regional Center Manager is a person working at a central warehouse who captures loading and offloading transactions that take place at his or her central warehouse.
- *Warehouse Manager* - The Warehouse Manager is similar to the Regional Center Manager, but works out of a single warehouse rather than a central warehouse. The warehouse manager captures loading and offloading transactions that take place at his or her single warehouse.
- *Buying Station Manager* - The Buying Station Manager works at a buying station and is responsible for buying agricultural products from the farmers.
- *Organizer* - The organizer is the person responsible for conducting surveys with the smallholder farmers.

The farmer or producer is also a part of the process but is not a user role as the farmer does not interact with the Rural Sourcing Management application.

### i Note

User roles and role titles are fully customizable by your system administrator during the initial system setup. The roles in the list above and used throughout this guide are samples that represent the main roles in the Rural Sourcing Management process. Based on your business need, additional roles and permissioning can be defined.

#### [Initial User Setup and Modifications \[page 43\]](#)

User roles are defined by your system administrator in conjunction with SAP personnel. User roles must be set up in the system before users can use the Rural Sourcing Management application.

#### [Tables of Permissions \[page 44\]](#)

User roles within the Rural Sourcing Management system determine which transactions the user can view and which transactions that the user can record. In addition, specific permissions have been created to address and protect data privacy.

### 4.1 Initial User Setup and Modifications

User roles are defined by your system administrator in conjunction with SAP personnel. User roles must be set up in the system before users can use the Rural Sourcing Management application.

Your company hierarchy must be fully defined before you can create user roles. During system configuration, user roles are attached to an organizational unit and there is a limit to the number of users per role per organizational unit, as shown in the following table:

## Sample User Setup

User Role	Organizational Unit	Users per Org Unit
<i>Regional Center Manager</i>	<i>Zone</i>	5
<i>Warehouse Manager</i>	<i>Warehouse</i>	5
<i>Buying Station Manager</i>	<i>Warehouse</i>	5
<i>Organizer</i>	<i>Warehouse</i>	5

### i Note

User role titles are fully customizable during the initial system setup. The role titles in the table above are samples that represent the four main roles in the Rural Sourcing Management process. Additional roles can also be defined, based on your business need.

## Modifying User Roles

Once the user roles are initially set up, your system administrator can make changes using the [Master Data](#) page of the Web interface.

Parent topic: [User Roles \[page 43\]](#)

## Related Information

[Tables of Permissions \[page 44\]](#)

## 4.2 Tables of Permissions

User roles within the Rural Sourcing Management system determine which transactions the user can view and which transactions that the user can record. In addition, specific permissions have been created to address and protect data privacy.

### Transaction Access Permissions

User role permissions are set by the administrator during initial system setup.

#### Example of Transaction Access Permissions

Transaction Type	Regional Center Manager Permissions	Warehouse Manager Permissions	Buying Station Manager Permissions	Organizer Permissions
Farmer Registration	None	None	Register and edit	None
Individual Buying	None	None	View and record	None
Payment	None	None	View and record	None
Advance	None	None	View and record	None
Loan Application	None	None	View and Record	None
Survey	None	None	None	View and Record
Price	None	None	View and Record	None
Loading Type 1	None	View only	View and Record	None
Offloading Type 1	None	View and Record	View only	None
Processing Start	None	View and Record	None	None
Processing End	None	View and Record	None	None
Loading Type 2	View only	View and Record	None	None
Offloading Type 2	View and Record	View only	None	None

## Data Privacy Permissions

The following permissions are used to establish and protect data privacy.

Permissions	Description	Comment
createRetentionPeriod	Create a new retention period for personal data	Web Interface Administrator only
readRetentionPeriod	View full history of defined retention periods	
readRetentionPeriod-Persons	View list of persons associated with a retention period	
revokePersonConsent	Revoke the consent given by a person with regards to accessing his or her personal data	
readAuditLogs	Get access to view audit logs	

Parent topic: [User Roles \[page 43\]](#)

## Related Information

[Initial User Setup and Modifications \[page 43\]](#)

## 5 Mobile Transactions

During the initial configuration of the Rural Sourcing Management system, a number of mobile transactions were defined and enabled to help you complete each stage of the supply chain sourcing.

### i Note

The names of the transactions are fully customizable and are set during the initial system setup. The terms listed in this guide are the default transaction names.

Administrators and central management using the Web Interface should refer to [Management Transactions \[page 48\]](#) for details on monitoring and managing master data and transaction data in the system.

### i Note

The *User Guide* documentation for the Rural Sourcing Management system contains all of the details related to the use of the mobile transactions, including how to review and modify your mobile settings and preferences, and how to synchronize your transactions from your mobile phone.

Refer to the [Using the Mobile Transactions](#) topic of the *Rural Sourcing Management User Guide* for full details.

# 6 Management Transactions

The Web interface of the Rural Sourcing Management system provides a way for system administrators and the management team to monitor master data and transaction data and create business reports.

When you log into the Web interface, you will see a menu list of management options on the left side of your screen. Each one of these options opens a separate page and some have multiple tabs once the page is open. Each of the management options is described in its own section in this guide.

For details on the management topics, see the appropriate document topic.

## [Batch Data Administration \[page 49\]](#)

Within the Rural Sourcing Management solution, batch data transactions are those transactions related to the upload and download of the master data, including all transaction data.

## [Managing Users \[page 54\]](#)

The *Users* option of the main menu on the Rural Sourcing Management system's Web interface allows you to view and manage all users of the system.

## [Managing and Monitoring Master Data \[page 56\]](#)

As part of the initial Rural Sourcing Management system setup, a master data set was created on the back end your administrator with input and direction from SAP personnel.

## [Managing Groups \[page 62\]](#)

Groups are often made up of organizations in the same geographical area that are supposed to participate in similar training activities.

## [Managing Trainings \[page 65\]](#)

Training topics are any topics that you want groups in your Rural Sourcing Management system to participate in.

## [Managing Price Information \[page 68\]](#)

The *Price Information* option of the main menu on the Rural Sourcing Management system's Web interface allows you to check pricing status and set all online prices for the agricultural products.

## [Managing Inputs \[page 69\]](#)

The *Rural Sourcing Management* system has a feature called *Input Supply* which helps the *Rural Sourcing Management* administrator maintain information about inputs, assign input quotas, and approve input requests coming from mobile phone users in the field.

## [Managing Surveys \[page 77\]](#)

Administrators of the Rural Sourcing Management system may want to ask small-holder farmers questions in order to gather information about them. The survey function of the mobile phone app helps to do this.

## [Managing Cases \[page 88\]](#)

The SAP Rural Sourcing Management administrator can create case templates for flagging if a farmer is violating one of the organization's rules, regulations, or standards.

## [Managing Activities \[page 92\]](#)

The SAP Rural Sourcing Management administrator can create, assign, and schedule activities for field agents to conduct with farmers/groups/organizations.

## 6.1 Batch Data Administration

Within the Rural Sourcing Management solution, batch data transactions are those transactions related to the upload and download of the master data, including all transaction data.

The *Administration* option of the main menu on the Rural Sourcing Management system's Web interface contains three tabs, indicating the three types of batch data handling that you can perform:

- *Transaction Download* - This tab opens by default when you select the *Administration* option. Use this tab to monitor the current status of any transaction downloads that are running and to initiate a new download.
- *Master Data Download* - Use this tab monitor the current status of any master data downloads that are running or to initiate a download of the master data listing for a specific organization.
- *Master Data Upload* - Use this tab to monitor the current status of any master data uploads that are running and to initiate an upload of master data.
- *Retention Period* - Use this tab to define the period of time for retaining personal data once a person has chosen to withdraw consent.

Transaction and master data downloads are in the form of Excel spreadsheets. This is especially useful for low-tech environments, such as local warehouses, cooperative offices, and so on. These data sheets can be used for business reporting and monitoring by your management teams.

### i Note

Master data downloads and uploads and transaction downloads cannot be initiated until all master data has been initially configured. See [Master Data \[page 38\]](#) for details.

For details on the download and upload actions, see the appropriate topic in the Related Links.

#### [Transaction Downloads \[page 50\]](#)

The *Transaction Download* tab opens by default when you select the *Administration* option of the Rural Sourcing Management Web interface. Use this tab to monitor the current status of any transaction downloads and to initiate a new download.

#### [Master Data Downloads \[page 51\]](#)

The *Master Data Download* tab is one of the tabs in the *Administration* option of the Rural Sourcing Management Web interface. Use this tab to monitor the current status of any master data downloads or to initiate a download of the master data listing for a specific organization.

#### [Master Data Uploads \[page 51\]](#)

The *Master Data Upload* tab is one of the tabs in the *Administration* option of the Rural Sourcing Management Web interface. Use this tab to monitor the current status of any master data uploads that are running and to initiate an upload of Master Data.

#### [Retention Period \[page 53\]](#)

The *Retention Period* tab is one of the tabs in the *Administration* option of the SAP Rural Sourcing Management Web Interface.

**Parent topic:** [Management Transactions \[page 48\]](#)

## Related Information

- [Managing Users \[page 54\]](#)
- [Managing and Monitoring Master Data \[page 56\]](#)
- [Managing Groups \[page 62\]](#)
- [Managing Trainings \[page 65\]](#)
- [Managing Price Information \[page 68\]](#)
- [Managing Inputs \[page 69\]](#)
- [Managing Surveys \[page 77\]](#)
- [Managing Cases \[page 88\]](#)
- [Managing Activities \[page 92\]](#)
- [Transaction Downloads \[page 50\]](#)
- [Master Data Downloads \[page 51\]](#)
- [Master Data Uploads \[page 51\]](#)

### 6.1.1 Transaction Downloads

The *Transaction Download* tab opens by default when you select the *Administration* option of the Rural Sourcing Management Web interface. Use this tab to monitor the current status of any transaction downloads and to initiate a new download.

Initiate a transaction download to create a report on all data related to all transactions captured in the field (all buying, loading, payment information, and so on). Transaction downloads are in the form of Excel spreadsheets. In the Excel file, there is one sheet for each transaction type that you have set up for the organization selected. Each transaction sheet contains columns for each of the data fields recorded for that transaction. This report gives you an overview of what is happening in the field. For instance, you can see how much of a particular product has been purchased or how many payments have been made to the farmers, and so on.

To initiate a download of the transaction data, select the organization from the *Organization* drop-down list and select a *Start Date* and *End Date* from the calendars provided, then click *Generate*. The progress of the operation is displayed in the *Logs* section of the screen. When your desired report is complete, the message "Data has been successfully exported. File is ready for download" displays in the *Logs* section and the *Download* button is enabled. Click *Download* to download the report to your computer.

**Parent topic:** [Batch Data Administration \[page 49\]](#)

## Related Information

- [Master Data Downloads \[page 51\]](#)
- [Master Data Uploads \[page 51\]](#)
- [Retention Period \[page 53\]](#)

## 6.1.2 Master Data Downloads

The *Master Data Download* tab is one of the tabs in the *Administration* option of the Rural Sourcing Management Web interface. Use this tab to monitor the current status of any master data downloads or to initiate a download of the master data listing for a specific organization.

The master data download is in the form of a Excel data sheet. This data file matches the format and structure of the initial master data sheet used to set up your system.

To initiate a download of the master data, select the organization from the *Organization* drop-down list and click *Generate*. The progress of the operation is displayed in the *Logs* section of the screen. When your desired report is complete, the message "Data has been successfully exported. File is ready for download" displays in the *Logs* section and the *Download* button is enabled. Click *Download* to download the report to your computer.

**Parent topic:** [Batch Data Administration \[page 49\]](#)

### Related Information

[Transaction Downloads \[page 50\]](#)

[Master Data Uploads \[page 51\]](#)

[Retention Period \[page 53\]](#)

## 6.1.3 Master Data Uploads

The *Master Data Upload* tab is one of the tabs in the *Administration* option of the Rural Sourcing Management Web interface. Use this tab to monitor the current status of any master data uploads that are running and to initiate an upload of Master Data.

Use this tab to monitor the current status of any master data uploads that are running and to initiate an upload of Master Data. Data uploads can be used to add new information or modify existing information to your master data. You will upload master data from Excel spreadsheets similar in format and structure of the initial master data sheet used to set up your system.

#### i Note

- A maximum of 16384 persons can be added or updated in one upload.
- A maximum of 4096 organizations can be added or updated in one upload.

You can add or update organizations and persons either through the Web Interface or through the Master Data sheet data uploads. To make changes or additions, first download the existing spreadsheet from the Web Interface. Then, to update any information you must first change the *operation\_to\_perform* column of the appropriate data sheet to **Update** and if you want to add an organization or person, change the *operation\_to\_perform* column of the appropriate data sheet to **Add**. When adding an organization, the mandatory fields are: *Parent Organization*, *Name*, and *Code*.

### ⚠ Caution

Changes to the master data can have an impact on the whole SAP Rural Sourcing Management for Barry Callebaut system. To avoid issues or unintended results, be very careful when making changes to master data and be sure to double-check all entries against the data that you initially uploaded before initiating a master data upload.

Before making any changes, you should always download the latest spreadsheet first. Then, make your desired changes and upload the updated master data. See the individual master data sheet topics for notes on any applicable mandatory fields, etc., prior to making additions or changes.

To upload new master data, do the following:

1. Use the [Browse](#) button to find and select your file.
2. Check the [Personal data use consent](#) checkbox to indicate consent has been obtained.

### ! Restriction

If you have not received consent for personal data use and do not check this checkbox, you will not be able to upload the new master data.

3. Click [Upload Master Data](#). The progress of the upload operation is displayed in the [Logs](#) section of the page. You can leave this page to do other work once the upload begins, but you must return to this page to check on the status and complete the final step.  
When your file upload is complete, the message "Data has been successfully imported." displays in the [Logs](#) section and the [Activate Imported Data](#) and [Cancel](#) buttons are enabled at the bottom of the page.
4. Click [Activate Imported Data](#) as a final confirmation. The updated master data will be available to the mobile applications at the next synchronization on the mobile device.

### → Tip

Click [Cancel](#) to stop the import operation at any time before completion.

Parent topic: [Batch Data Administration \[page 49\]](#)

## Related Information

[Transaction Downloads \[page 50\]](#)

[Master Data Downloads \[page 51\]](#)

[Retention Period \[page 53\]](#)

## 6.1.4 Retention Period

The [Retention Period](#) tab is one of the tabs in the [Administration](#) option of the SAP Rural Sourcing Management Web Interface.

Use this tab to define or change retention periods. Retention Periods are related to the time period for retaining personal data once a Person has chosen to withdraw Consent.

### **i** Note

The **Default Retention Period** is **180** days. The only way to change the default period is to create a new Retention Period through the [Change](#) option.

The [Retention Period History](#) list includes the following fields:

- [Created At](#)
- [Name](#)
- [Reason](#)
- [Type](#)
- [Days](#)

To help refine the list, you can search for a keyword or select a [Created Date](#).

## Change the Retention Period

Each time you change a retention period, you are creating a new period. Do the following:

1. Click the [Change](#) link below the current active retention period at the top of the tab. This opens the [Change Retention Period](#) window.
2. Enter a [Name](#) for the retention period.
3. Optionally, enter a reason for the retention period.
4. Enter the number of days the retention period will last.
5. Select a Retention Period [Type](#) from the drop-down menu - your choices are **Law** and **Customer**.
6. Click [Save](#) to save the Retention Period you defined. Note: a warning message will display to remind you that the current Retention Period will be set to Inactive; click [Continue](#) to save the new Retention Period.

As a result of the change, the new Retention Period is displayed at the top of the tab as the [Current Active Retention Period](#) and the previous Retention Period is moved into the [Retention Period History](#) List.

## View Person Details for a Retention Period

To view the [Person Details](#) list for a particular Retention Period, do the following:

1. Click on the name of the [Current Active Retention Period](#) or click on a name of a Retention Period from the [Retention Period History](#) list. The [Person Details](#) page for the selected Retention Period displays.
2. The list of Persons associated with the Retention Period are listed with the following information fields in view only mode:

- [First Name](#)
  - [Last Name](#)
  - [Gender](#)
  - [Staff Code | Producer Code](#)
  - [Role - Organization](#)
3. If the list is long, there will be multiple pages and each page will display 20 results. To search for a particular person, enter the name in the [Persons](#) search box.
  4. Click [Cancel](#) to exit the page.

### **i** Note

Once a Person removes Consent and is assigned a Retention Period, the Person's transactions will still be visible in the Master Data, but the Person is blocked and cannot be seen. After the Retention Period expires, the Person is deleted from the Master Data.

Parent topic: [Batch Data Administration \[page 49\]](#)

## Related Information

[Transaction Downloads \[page 50\]](#)

[Master Data Downloads \[page 51\]](#)

[Master Data Uploads \[page 51\]](#)

## 6.2 Managing Users

The [Users](#) option of the main menu on the Rural Sourcing Management system's Web interface allows you to view and manage all users of the system.

On the [Users](#) page, you get a quick view of all of the users in the system, including their user name, their real first and last name, their email address, and whether they are active or inactive in the system. Use the radio buttons to display [All](#) users, [Active](#) users, or [Inactive](#) users. Enter text into the [Search](#) text box for an interactive search for a specific user.

Managers or administrators can perform the following management tasks:

- Edit personal details for users
- Assign existing users to different organizations
- Assign existing users to different or additional organizational roles
- Set users to **Active** or **Inactive** status
- Add new users
- Enable two-factor authentication per user to secure administrative features from unauthorized access

To make any changes to a user's details select the user from the list and click [Edit](#).

You can modify or add any of the details in the personal details fields, as necessary.

To set the user status, slide the *Operation Status* selector to the right to display the green check mark and set the user to **Active** or slide the selector to the left to display the red "x" and set the user to **Inactive**. A status of **Inactive** means that a user's credentials no longer work and that user can no longer log into the system.

#### **i** Note

It may be possible that a user has transactions on his or her mobile device that have not been synchronized at the time you change the user's status to **Inactive**. In this case, the transaction data will remain on his or her phone until you change the status back to **Active** and a transaction synchronization can be performed.

You can also make changes to the user's roles. In the *Assigned Organization Roles* section, use the appropriate icon to add, edit, or delete a role.

#### **i** Note

For a full description of the user roles and permissions, see [User Roles \[page 43\]](#).

When you have made all applicable changes on the *New/Edit Person Details* screen, click *Save* to keep the changes or click *Cancel* to close the screen without saving any changes. You are returned to the New/Edit User screen and you must click *Save* again to save any changes you made.

To add a new user, click *Add* on the *Users* list page. The *New/Edit User* screen displays. Enter a *Username*. By default, the *Operation Status* is set to **Inactive**. Slide the selector to the right to set the user to **Active**. Select the person from the person search list at the bottom of the screen, and click *Save* to create the new user.

#### **i** Note

When you create a new user, you can only select from the list of persons already entered into the master data for the system.

**Parent topic:** [Management Transactions \[page 48\]](#)

## Related Information

[Batch Data Administration \[page 49\]](#)

[Managing and Monitoring Master Data \[page 56\]](#)

[Managing Groups \[page 62\]](#)

[Managing Trainings \[page 65\]](#)

[Managing Price Information \[page 68\]](#)

[Managing Inputs \[page 69\]](#)

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## 6.3 Managing and Monitoring Master Data

As part of the initial Rural Sourcing Management system setup, a master data set was created on the back end your administrator with input and direction from SAP personnel.

The *Master Data* option of the main menu on the Rural Sourcing Management system's Web interface contains multiple tabs, indicating the types of master data that you can monitor and edit. The data that you can manage corresponds to the data sheets initially created during system setup, as described in the "Initial Master Data Setup" topic of the Administration Guide. The tabs include:

- *Organizations* - Use this tab to edit existing organizations and add new organizations.
- *Persons* - Use this tab to edit personal details, activate and deactivate users, and assign roles.
- *Products* - Use this tab to view the full product list, activate or deactivate existing products, or add new products.
- *Certifications* - Use this tab to view the certifications list, activate or deactivate a certification, or add new certifications to the system.

For details on using the various tabs, see the appropriate topic in Related Links:

### [Managing Organizations \[page 57\]](#)

The *Organizations* tab opens by default when you select the *Master Data* option of the Rural Sourcing Management Web interface. Use this tab to edit existing organizations and add new organizations.

### [Managing Persons \[page 58\]](#)

The *Persons* tab is one of the tabs in the *Master Data* option of the Rural Sourcing Management Web interface.

### [Managing Products \[page 60\]](#)

The *Products* tab is one of the tabs in the *Master Data* option of the Rural Sourcing Management Web interface.

### [Managing Certifications \[page 61\]](#)

The *Certifications* tab is one of the tabs in the *Master Data* option of the Rural Sourcing Management Web interface. Certifications ensure specific standards, such as agricultural practice, trade standards, labor standards, and so on. Farmers comply with certification standards through recurring farm inspections and a membership in certification organizations.

**Parent topic:** [Management Transactions \[page 48\]](#)

## Related Information

[Batch Data Administration \[page 49\]](#)

[Managing Users \[page 54\]](#)

[Managing Groups \[page 62\]](#)

[Managing Trainings \[page 65\]](#)

[Managing Price Information \[page 68\]](#)

[Managing Inputs \[page 69\]](#)

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[Managing Cases \[page 88\]](#)

[Managing Activities \[page 92\]](#)

[Managing Organizations \[page 57\]](#)

[Managing Persons \[page 58\]](#)

[Managing Products \[page 60\]](#)

[Managing Certifications \[page 61\]](#)

## 6.3.1 Managing Organizations

The *Organizations* tab opens by default when you select the *Master Data* option of the Rural Sourcing Management Web interface. Use this tab to edit existing organizations and add new organizations.

### Context

The current structural organization list is displayed on the *Organization* tab. To edit the details of an existing organization, select it from the list and click *Edit* to make any necessary changes on the *Edit Organizations Details* screen.

To create a new organization, take the following steps.

### Procedure

1. Click in the first column of the *Organization Name* table to enable the *Add* and *Edit* buttons.
2. Click *Add*.  
The *New/Edit Organizations* screen displays.
3. Complete the applicable fields for the new organization. Only the *Parent Organization*, *Name*, and *Code* are required.
  - a. *Parent organization* - select from the drop-down list
  - b. *Type* - this field is automatically populated based on your initial master data input
  - c. *Name* - this is the name of the organization
  - d. *Code*
  - e. *Phone number*
  - f. *E-mail*
  - g. *Longitude*
  - h. *Latitude*
4. Set the *Operation Status*. The default is **Active**, indicated by the green check mark. To make the person **Inactive**, slide the *Operation Status* selector to the left to see the red "x".
5. Click *Save* to create the new organization or click *Cancel* to leave the *New Organization Details* screen without saving your changes

## Results

The organization you added should now be displayed on the organization list. If you do not see the new organization in the list, click the [Refresh](#) icon to update the list.

**Task overview:** [Managing and Monitoring Master Data \[page 56\]](#)

## Related Information

[Managing Persons \[page 58\]](#)

[Managing Products \[page 60\]](#)

[Managing Certifications \[page 61\]](#)

## 6.3.2 Managing Persons

The [Persons](#) tab is one of the tabs in the [Master Data](#) option of the Rural Sourcing Management Web interface.

### Context

Use this tab to edit personal details, activate and deactivate users, and assign roles.

#### i Note

Persons in the master data list are not necessarily users of the Rural Sourcing Management system. The [Persons](#) list contains all individuals that have anything to do with any part of the supply chain process or management, regardless of role or user status in the application.

By default, the persons list displays all persons, but you can select the appropriate radio button to display only the **Active** or **Inactive** persons. The [Persons](#) list includes the following fields:

- [First Name](#)
- [Last Name](#)
- [Staff Code / Producer Code](#)
- [Role - Organization](#)
- [Active](#)
- [Consent](#) indicator (**True** or **False** to indicate consent to save personal information)

To help refine the list, you can select items from several organization filters. As you select an item from one, the next filter option is enabled. Filter categories include:

- [Country](#)
- [Associations](#)

- [Cooperative](#)
- [Warehouse](#)
- [Village/Section](#)

To edit the details of an existing certification, select it from the list and click [Edit](#) to make any necessary changes on the [New/Edit Certification](#) screen.

To create a new certification, take the following steps.

## Procedure

1. Select each organization filter, as appropriate for the new person.
2. Click [Add](#).  
The [New/Edit Person Details](#) screen displays.
3. Complete the applicable fields for the new person. Only the [First Name](#), [Last Name](#), and [Gender](#) are required.
  - a. First Name
  - b. Last Name
  - c. Staff Code
  - d. Date of Birth
  - e. Gender - select from the drop-down menu list
  - f. E-mail
  - g. Phone Number
4. Set the [Operation Status](#). The default is **Active**, indicated by the green check mark. To make the person **Inactive**, slide the [Operation Status](#) selector to the left to see the red "x".
5. If applicable, assign organizational roles to this person.
  - a. Click the plus (+) icon.
  - b. Select a [Role](#) from the drop-down list.
  - c. Select an [Organization](#) from the drop-down list.
  - d. Set the [Operation Status](#). The default for new persons is **Active**, indicated by the green slider. To make the person **Inactive**, slide the [Operation Status](#) selector to the left to see the red "x".
  - e. Click [Save](#).
6. Click [Save](#) to create the new person or click [Cancel](#) to leave the [New/Edit Person Details](#) screen without saving your changes

## Results

The person you added should now be displayed on the persons list. If you do not see the new person in the list, click the [Refresh](#) icon to update the list.

## i Note

If an Administrator sets a Person's *Consent* indicator to **False**, it blocks the person and their data for a given time period. After the expiration of the Retention Period, the person will be deleted from the Master Data altogether.

**Task overview:** [Managing and Monitoring Master Data \[page 56\]](#)

## Related Information

[Managing Organizations \[page 57\]](#)

[Managing Products \[page 60\]](#)

[Managing Certifications \[page 61\]](#)

## 6.3.3 Managing Products

The *Products* tab is one of the tabs in the *Master Data* option of the Rural Sourcing Management Web interface.

### Context

Use this tab to view the full product list, activate or deactivate existing products, or add new products. For details on initial product selection, see the "Crop Selection" topic in the "Installation and System Setup" section of the Administration Guide.

By default, the products list displays all products, but you can select the appropriate radio button to display only the **Active** or **Inactive** products.

To edit the details of an existing product, select it from the list and click *Edit* to make any necessary changes on the *New/Edit Product* screen.

To create a new product, take the following steps.

### Procedure

1. Click *Add*.  
The *New/Edit Product* screen displays.
2. Enter the product name in the *Name* field. This is a required field.
3. Optionally, select a certifier from the *Certifier* field drop-down list.
4. Set the *Operation Status*. The default is **Active**, indicated by the green check mark. To make the product **Inactive**, slide the *Operation Status* selector to the left to see the red "x".

5. Click [Save](#) to create the new product or click [Cancel](#) to leave the [New/Edit Product](#) screen without saving your changes.

## Results

The product you added should now be displayed on the product list. If you do not see the new product in the list, click the [Refresh](#) icon to update the list.

**Task overview:** [Managing and Monitoring Master Data \[page 56\]](#)

## Related Information

[Managing Organizations \[page 57\]](#)

[Managing Persons \[page 58\]](#)

[Managing Certifications \[page 61\]](#)

## 6.3.4 Managing Certifications

The [Certifications](#) tab is one of the tabs in the [Master Data](#) option of the Rural Sourcing Management Web interface. Certifications ensure specific standards, such as agricultural practice, trade standards, labor standards, and so on. Farmers comply with certification standards through recurring farm inspections and a membership in certification organizations.

### Context

Use this tab to view the certifications list, activate or deactivate a certification, or add new certifications to the system. For details on initial certification selection, see the "Crop Selection" topic in the "Installation and System Setup" section of the Administration Guide.

By default, the certifications list displays all certifications, but you can select the appropriate radio button to display only the **Active** or **Inactive** certifications. To edit the details of an existing certification, select it from the list and click [Edit](#) to make any necessary changes on the [New/Edit Certification](#) screen. To create a new certification, take the following steps.

### Procedure

1. Click [Add](#).  
The [New/Edit Certification](#) screen displays.

2. Enter the certification name in the *Name* field. This is a required field.
3. Enter the certification code in the *Code* field.
4. Set the *Operation Status*. The default is **Active**, indicated by the green check mark. To make the certification **Inactive**, slide the *Operation Status* selector to the left to see the red "x".
5. Click *Save* to create the new certification or click *Cancel* to leave the *New/Edit Certification* screen without saving your changes.

## Results

The certification you added should now be displayed on the certifications list. If you do not see the new certification in the list, click the *Refresh* icon to update the list.

**Task overview:** [Managing and Monitoring Master Data \[page 56\]](#)

## Related Information

[Managing Organizations \[page 57\]](#)

[Managing Persons \[page 58\]](#)

[Managing Products \[page 60\]](#)

## 6.4 Managing Groups

Groups are often made up of organizations in the same geographical area that are supposed to participate in similar training activities.

For example, groups can include several producer / farmer organizations or can include several buying station organizations.

Within the Rural Sourcing Management System, you can add and edit groups from the *Groups* page of the *Master Data* tab. You can also search for specific groups or filter the group list.

[Adding a Group \[page 63\]](#)

You can add groups from the *Groups* page of the *Master Data* tab.

[Editing a Group \[page 64\]](#)

You can edit groups from the *Groups* page of the *Master Data* tab.

[Searching for and Filtering Groups \[page 65\]](#)

You can search for and filter groups from the *Groups* page of the *Master Data* tab.

**Parent topic:** [Management Transactions \[page 48\]](#)

## Related Information

- [Batch Data Administration \[page 49\]](#)
- [Managing Users \[page 54\]](#)
- [Managing and Monitoring Master Data \[page 56\]](#)
- [Managing Trainings \[page 65\]](#)
- [Managing Price Information \[page 68\]](#)
- [Managing Inputs \[page 69\]](#)
- [Managing Surveys \[page 77\]](#)
- [Managing Cases \[page 88\]](#)
- [Managing Activities \[page 92\]](#)

### 6.4.1 Adding a Group

You can add groups from the *Groups* page of the *Master Data* tab.

#### Procedure

1. Select the *Master Data* tab on the left side of the screen.
2. Click the *Groups* page.
3. Click *Add* in the middle right of the *Groups* page.
4. Enter the details for the new group including:
  - a. **<Name>** - name of the new group
  - b. **<Code>** - unique code of the new group
  - c. **<Operation Status>**
    - a green checkmark indicates the group is **active** in the system and **available** for selection
    - a red "x" indicates the group is **inactive** in the system and is **not available** for selection
  - d. **<Location>** - the latitude and longitude of the group's location (if known)
5. Click the button with three dots ( ... ) in the bottom right part of the screen to add organizations to be part of the group. Then click *Edit* when it displays.
6. Select the *parent organization* of the organization(s) you want to assign to the new group.
7. Check the boxes next to all the names of the organization in the list that you want to include in the new group.
8. Click *Save*.
9. Review the details for the new group you are creating and click *Save* again.

**Task overview:** [Managing Groups \[page 62\]](#)

## Related Information

[Editing a Group \[page 64\]](#)

[Searching for and Filtering Groups \[page 65\]](#)

### 6.4.2 Editing a Group

You can edit groups from the *Groups* page of the *Master Data* tab.

#### Procedure

1. Select the *Master Data* tab on the left side of the screen.
2. Click the *Groups* page.
3. Click on the group in the list that you want to edit.
4. Click *Edit* on the right of the *Groups* page.
5. You have the option to change the following:
  - a. You can change the *Name*, *Code*, and *Latitude/Longitude* of the group.
  - b. You can change the *Operation Status* of the group from **active** (green checkmark) to **inactive** (red "x").
  - c. You can add or remove the organizations that are members of the group.
6. Click *Save* when you have completed all desired changes.

**Task overview:** [Managing Groups \[page 62\]](#)

## Related Information

[Adding a Group \[page 63\]](#)

[Searching for and Filtering Groups \[page 65\]](#)

## 6.4.3 Searching for and Filtering Groups

You can search for and filter groups from the *Groups* page of the *Master Data* tab.

### Procedure

1. Select the *Master Data* tab on the left side of the screen.
2. Click the *Groups* page.
3. Click on the drop-down menus in the *Select an Organization* section to choose the organization by which to filter the groups.
  - a. Start by selecting the *Region* by which you want to filter organizations/ groups.
  - b. Continue by selecting *Country*, *Port/District*, *Factory*, *Buying Station*, and/ or *Field* until you have found the exact groups that you want to filter for.
  - c. Sometimes, you might want to filter for all the groups in a region or country; this will bring you a lot of results. To do this, simply select *All* in the *Region* or *Country* drop-down list and you will see all the persons within that region or country.
  - d. Other times, you might want to filter for all groups in a smaller area like in a *Field*; this will likely bring you fewer, more specific results. To do this, continue to filter the results in all the drop-down lists up to the *Field* drop-down list.
4. When you select the *Organization* you want to filter by, all the groups displayed in the list below belong to that organization.
5. You can search for a specific *Group*; type its name into the search bar on the top left of the *Organizations* page

**Task overview:** [Managing Groups \[page 62\]](#)

### Related Information

[Adding a Group \[page 63\]](#)

[Editing a Group \[page 64\]](#)

## 6.5 Managing Trainings

Training topics are any topics that you want groups in your Rural Sourcing Management system to participate in.

When you create a training topic in the administrator system, it becomes available for the chosen group(s) in the mobile phone app within specific dates.

Members of the assigned group(s) will be expected to participate in the training during that specified period of time and their attendance at the training can be recorded in the mobile phone app. Assigning training in the

administrator system and taking attendance in the mobile phone app is a way for you to keep track of which members of the group(s) have received which training topics.

For example, you might want to...

- ...assign certain training topics to groups with farmers/producers such as a training on fertilizer application.
- ...assign certain training topics to groups with buying station members such as a training on quality checking.
- ...assign certain training topics to all groups in your Rural Sourcing Management system such as a training on conflict resolution.

[Adding a Training Topic \[page 66\]](#)

You can add training topics from the *Training* tab.

[Assigning Training to Groups \[page 67\]](#)

You can add training to groups from the *Training* tab.

**Parent topic:** [Management Transactions \[page 48\]](#)

## Related Information

[Batch Data Administration \[page 49\]](#)

[Managing Users \[page 54\]](#)

[Managing and Monitoring Master Data \[page 56\]](#)

[Managing Groups \[page 62\]](#)

[Managing Price Information \[page 68\]](#)

[Managing Inputs \[page 69\]](#)

[Managing Surveys \[page 77\]](#)

[Managing Cases \[page 88\]](#)

[Managing Activities \[page 92\]](#)

### 6.5.1 Adding a Training Topic

You can add training topics from the *Training* tab.

#### Procedure

1. Select the *Training* tab on the left side of the screen.
2. Click *Add* in the top right of the *Training* page.
3. Enter the required details for the new training including:

- a. <Category> or <Type> of the training
- b. <Title> of the training
- c. <Operation Status> of the training

- a green checkmark indicates the training is **active** in the system and **available** for assigning to groups

- a red "x" indicates the training is **inactive** in the system and is **not available** for assigning to groups

4. Click *Save*.

**Task overview:** [Managing Trainings \[page 65\]](#)

## Related Information

[Assigning Training to Groups \[page 67\]](#)

## 6.5.2 Assigning Training to Groups

You can add training to groups from the *Training* tab.

### Procedure

1. Select the *Training* tab on the left side of the screen.
2. Select the training topic in the list that you want to assign to a group.
3. Click *Assign* at the top right of the *Training* page.
4. Click *Add* on the left side of the pop-up screen.
5. Select the *Start Date* and *End Date* for the training topic assignment.
  - The start date is the date from which the training topic is available for selection in the mobile phone app for the group. You can set the start date for today for immediate effect or for a date in the future for later effect.
  - The end date is the last date the training topic can be selected in the mobile phone app.

**Task overview:** [Managing Trainings \[page 65\]](#)

## Related Information

[Adding a Training Topic \[page 66\]](#)

## 6.6 Managing Price Information

The *Price Information* option of the main menu on the Rural Sourcing Management system's Web interface allows you to check pricing status and set all online prices for the agricultural products.

The Rural Sourcing Management system allows for both online pricing and offline pricing. Online prices are set on the back end through the Web interface and cannot be changed in the field, but offline prices can only be changed from individual mobile devices in the field. Online pricing can be set for everyone and special pricing can be set for individual organizations.

### → Tip

Products can have multiple prices, depending on the product and organization combination, but can only have one valid price per combination at a time.

The pricing list displays all prices, by default. You can choose to display only *Pending* or only *Valid* prices by selecting the appropriate radio button. You can also search the pricing list for a specific product or organization or you can search by the start date of the price.

For each price in the price list, the following fields are displayed:

- *Price*
- *Product*
- *Organization* (if applicable)
- *Start Date*
- *Status* - statuses include:
  - **Valid** - this indicates that this price is current for the product and organization combination
  - **Overridden** - this indicates that this price is no longer valid because there is a more current, valid price for the product and organization combination
  - **Pending** - this indicates a price that is set for use for a future date. Once that date arrives, the status automatically changes to **Valid**.

To create a new price, click the *Add Price* button and complete the appropriate pricing fields, and click *Save*. All fields on the *New Price* screen are required with the exception of *Organization*. The fields include:

- *Product* - select a product from the drop-down menu
- *Organization* - optionally, select an organization from the drop-down menu
- *Amount* - enter the product price
- *Currency* - enter the currency
- *Unit of Measurement* - enter the unit of measurement applicable for this price
- *Start Date* - select a date from the calendar on which this price is to become valid

### i Note

If you do not select an organization in the *Organization* field when setting a price, the price is applicable to all organizations for that product.

Parent topic: [Management Transactions \[page 48\]](#)

## Related Information

[Batch Data Administration \[page 49\]](#)

[Managing Users \[page 54\]](#)

[Managing and Monitoring Master Data \[page 56\]](#)

[Managing Groups \[page 62\]](#)

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## 6.7 Managing Inputs

The *Rural Sourcing Management* system has a feature called *Input Supply* which helps the *Rural Sourcing Management* administrator maintain information about inputs, assign input quotas, and approve input requests coming from mobile phone users in the field.

Farmers who participate in the *Rural Sourcing Management* system often need inputs such as seeds, fertilizers, insecticide, and personal protective equipment (PPE) in order to be successful farmers. Sometimes it may be necessary to assign quota assignments in order to regulate the amount of an input a farmer receives. On the mobile phone side, users can make requests for input quotas, manage the logistics and stocks of inputs, and distribute inputs to farmers.

All inputs that will be distributed to farmers must first be entered into the *Rural Sourcing Management* administrator system. The process of uploading and assigning input quotas is the responsibility of the system administrator and is done through the Web Interface. The distribution of the inputs is done through the mobile phone app by the field agent (Lead Farmer). The back end administration tasks are described in this guide and the distribution of inputs is described in the User Guide.

All inputs that will be distributed to farmers must first be entered into the Rural Sourcing Management administrator system. This can be done in one of two ways:

- System Administrator assigns the Input Quotas
  - Administrator can limit the amount of inputs for each farmer by setting a quota
  - Administrator can assign input quotas for a single input for multiple farmers at one time by uploading an Excel spreadsheet
- Inputs are requested on the mobile phone app and reviewed and approved in the Administrator system

See the appropriate topic for details.

### [Assigning Input Quotas \[page 70\]](#)

An Administrator user in the *Rural Sourcing Management System* Web Interface can limit the amount of inputs for each farmer by setting a quota.

### [Uploading Input Quota Assignments via an Excel Spreadsheet \[page 71\]](#)

It is possible to set input quotas for a single input for multiple farmers at one time by uploading an Excel sheet.

[Assigning an Input Quota to an Individual Farmer \[page 73\]](#)

It is possible to set an input quota for one farmer at a time directly on the Administrator System.

[Editing an Input Quota for an Individual Farmer \[page 74\]](#)

It is possible to edit an input quota for a farmer directly in the Administrator System.

[Viewing all Quotas Assigned to an Organization \[page 75\]](#)

You can filter input quota assignments so you only see those for a specific organization.

[Reviewing and Approving Input Requests \[page 75\]](#)

When in the field, a field agent (Lead Farmer) can submit a request for inputs on behalf of a farmer using the mobile phone app.

**Parent topic:** [Management Transactions \[page 48\]](#)

## Related Information

[Batch Data Administration \[page 49\]](#)

[Managing Users \[page 54\]](#)

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[Managing Price Information \[page 68\]](#)

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## 6.7.1 Assigning Input Quotas

An Administrator user in the *Rural Sourcing Management System* Web Interface can limit the amount of inputs for each farmer by setting a quota.

The Administrator might want to set a quota to ensure a farmer does not receive too much of a specific input. For example, a quota might be used to ensure a farmer with only 1 acre of land does not receive seeds that can plant 2 acres of land.

A quota helps to prevent misuse of inputs. It limits the inputs given to a farmer so he/ she only receives the amount needed and not an excess amount. Quotas are set for a specific *Type* and *Volume* of an input. Quotas are valid for a selected time frame, meaning it can only be distributed during that time.

An example quota for Farmer A is that he can receive up to 200 kgs of DAP fertilizer between February and March to ensure timely planting.

**Parent topic:** [Managing Inputs \[page 69\]](#)

## Related Information

[Uploading Input Quota Assignments via an Excel Spreadsheet \[page 71\]](#)

[Assigning an Input Quota to an Individual Farmer \[page 73\]](#)

[Editing an Input Quota for an Individual Farmer \[page 74\]](#)

[Viewing all Quotas Assigned to an Organization \[page 75\]](#)

[Reviewing and Approving Input Requests \[page 75\]](#)

## 6.7.2 Uploading Input Quota Assignments via an Excel Spreadsheet

It is possible to set input quotas for a single input for multiple farmers at one time by uploading an Excel sheet.

### Context

#### i Note

While many different farmers can be assigned individual *Input Quota Amounts* at the same time with the Excel sheet, they must all be assigned quotas for the *same input* on one Excel sheet. If you want to assign input quotas for several different inputs, you must upload several Excel sheets, one for each input for which you want to set a quota.

### Procedure

1. Click on the *Input Supply* tab on the left side of the screen.
2. Click *Download Template* at the top right of the screen.
3. Click on the *Quota Assignment Sheet* that you have just downloaded. The Quota Assignment sheet may also be found in the *Downloads* folder of your computer, if you are using a PC computer.
4. Open the *Quota Assignment* Excel file that you just downloaded.
5. Decide on which input you want to assign to assign an input quota.
6. Enter the **<Producer Code>** that is assigned to a farmer in the Administrator system. Then enter the **<Quantity>** of the input you want to assign as his or her quota.

Check what unit of measurement is assigned to the input in the Administrator system. For example, Urea may come in grams while seeds may come in bags. Check this in the *Master Data* tab on the *Products* page.

7. Repeat on each row of the sheet, entering all *Producer Codes* and *Quantities* of the input you want to assign.
8. After you have added all the quota assignments for all farmers who need a specific input, save the Excel file to your computer in a location that you will remember, such as on your Desktop or in a specific folder.

9. Return to the main *Input Supply* tab in the administrator system.
10. Click *Import* at the top right of the page.
11. Click *Browse* in the pop-up window and find the *Quota Assignment* Excel file you completed and saved in Step 8. Search for and click on that file in the pop-up window. Click *Open* in the pop-up window.

You will then see the name of the *Quota Assignment* sheet file in the box.

12. Choose the product/input that the quota assignment applies to. The unit of measurement for the input will be shown beside each possible selection. Ensure that it is the unit of measurement you expected for that input.

#### **i Note**

Remember that you can only upload a bulk batch of quota assignments for one product/input at a time. If you had quota assignments in your Excel sheet for different inputs, go back and revise the sheet so all farmers' quotas apply to the same type of input.

13. Click *Save*.

Now the quota assignment set for the input for the selected farmers is effective in the Administrator System.

14. If you wish to upload a quota assignment for multiple farmers for a different input, repeat steps 1-13 to fill in and upload a Quota Assignment Excel sheet for another input.

#### **i Note**

If there is an error with the upload, an error message will display and tell you what the problem is.

A common mistake that can causes errors while importing a quota assignment sheet is if you have included a Producer Code that does not exist in the *Rural Sourcing Management System*.

**Task overview:** [Managing Inputs \[page 69\]](#)

## **Related Information**

[Assigning Input Quotas \[page 70\]](#)

[Assigning an Input Quota to an Individual Farmer \[page 73\]](#)

[Editing an Input Quota for an Individual Farmer \[page 74\]](#)

[Viewing all Quotas Assigned to an Organization \[page 75\]](#)

[Reviewing and Approving Input Requests \[page 75\]](#)

## 6.7.3 Assigning an Input Quota to an Individual Farmer

It is possible to set an input quota for one farmer at a time directly on the Administrator System.

### Procedure

1. Click on the *Input Supply* tab on the left side of the screen.
2. Click Add at the top right of the screen.
3. Scroll down and choose the organization that the farmer belongs to that for which you want to create a quota assignment. This will filter so only the farmers within that organization are shown in the list below.
4. Scroll to the bottom of the pop-up window and click on the name of the farmer for which you want to set an input quota.

You can also search for the farmer by typing their name into the search bar, searching farmers according to their registration status or by filtering for all, active, or inactive persons.

5. After choosing the farmer, scroll back to the top of the pop-up window and fill in information about the quota you want to set.
  - a. Enter the **<Start Date>** and **<End Date>** for the quota assignment. This means the input can be distributed to the person within this window of time when the quota assignment is valid.
  - b. Enter the **<Product / Input>** the quota is for.
  - c. Enter the **<Quota Amount>** you want to assign for the product/ input.

Check what unit of measurement is assigned to the input in the administrator system. For example, Urea may come in grams while seeds may come in bags. This information will appear next to each input in the list.

- d. After you enter a quota amount, the system will automatically generate how many units of the product/ input the farmer will receive per mapped hectare.

This will only appear if the farmer's total farm hectares have been mapped in the system.

This can help guide you to decide on a quota assignment. For example, if you want to give the farmer about 2 bags of Urea for each of his farm's hectares, the system can help you validate your estimation. By typing in 3 bags of Urea, the system validates that this will provide for about 2 bags per hectare.

- e. Enter the **<Operation Status>** of the quota assignment.

A green check mark indicates that the quota assignment is **active** in the system.

A red "x" indicates that the quota assignment is **inactive** in the system.

6. Click *Save*.

Now the quota assignment set for the input for the selected farmer is effective in the Administrator System (if the Operation Status was set to **active** – green check mark).

7. If you want to set a quota assignment for a different input for the same farmer or for a different farmer entirely, repeat steps 1-6.

**Task overview:** [Managing Inputs \[page 69\]](#)

## Related Information

[Assigning Input Quotas \[page 70\]](#)

[Uploading Input Quota Assignments via an Excel Spreadsheet \[page 71\]](#)

[Editing an Input Quota for an Individual Farmer \[page 74\]](#)

[Viewing all Quotas Assigned to an Organization \[page 75\]](#)

[Reviewing and Approving Input Requests \[page 75\]](#)

## 6.7.4 Editing an Input Quota for an Individual Farmer

It is possible to edit an input quota for a farmer directly in the Administrator System.

### Procedure

1. Click on the *Input Supply* tab on the left side of the screen.
2. Find the name of the farmer that you wish to edit the quota assignment for. You can use the filters at the top of the page to search for the farmer according to their name, organization, start and end date of their quota assignment, and status of their assignment.
3. Click the *Action* button in the same row as the farmer name.
4. Click *Edit*.
5. Edit details of the input quota including the *Start Date* and *End Date*, the *Product*, the *Quota Amount*, the *Operation Status*, and the *Person* the quota assignment is for.
6. Click *Save*.

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## Related Information

[Assigning Input Quotas \[page 70\]](#)

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[Assigning an Input Quota to an Individual Farmer \[page 73\]](#)

[Viewing all Quotas Assigned to an Organization \[page 75\]](#)

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## 6.7.5 Viewing all Quotas Assigned to an Organization

You can filter input quota assignments so you only see those for a specific organization.

### Procedure

1. Click on the *Input Supply* tab on the left side of the screen.
2. Choose the organization you want to filter quota assignments for at the top of the screen.  
Only the quota assignments for that organization will then appear in the list.
3. You can also filter the list to see only those quota assignments within a specific start and end date, only those quota assignments for a specific individual farmer, or according to quota assignment status.

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### Related Information

[Assigning Input Quotas \[page 70\]](#)

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[Assigning an Input Quota to an Individual Farmer \[page 73\]](#)

[Editing an Input Quota for an Individual Farmer \[page 74\]](#)

[Reviewing and Approving Input Requests \[page 75\]](#)

## 6.7.6 Reviewing and Approving Input Requests

When in the field, a field agent (Lead Farmer) can submit a request for inputs on behalf of a farmer using the mobile phone app.

This allows inputs to be requested by field agents even if the Administrator did not set an input quota for a farmer. The input request must then be reviewed by an appropriate user of the Administrator System and approved before distribution.

### Review Input Requests

After an input request is made through the mobile phone app, an appropriate user of the Administrator System must either approve or deny the request. Requests must be approved or denied one by one and cannot be processed in bulk.

The following steps are needed to review and approve or deny an input request:

1. Click on the Input Supply tab on the left side of the screen.
2. At the top of the screen, filter the quota assignments by status. Choose to filter by **Requested**.
3. Find the input request you want to review.
4. Click the *Action* button next to its status.
  - If you *Approve* an input request, its status will change to **Effective** and will become an input quota for the farmer.
  - If you *Deny* an input request, its status will change to **Denied** and it will not become an input quota for the farmer.

## Status Types for Input Requests

There are six possible status types for input requests in the administrator system.

Status Type	Description
Requested	This is when an input request has come from a mobile phone user and is waiting for review by an authorized user of the Administrator System. It is not possible to distribute this input to the farmer yet (unless the mobile user overrides a warning message on the mobile phone app to distribute anyway without approval.)
Effective	This is when an input request has been assigned or approved by an authorized user of the Administrator System and it is active because it is still within the requested time frame. It is possible to distribute this input.
Denied	This is when an input request has been denied by an authorized user of the Administrator System and it is NOT an active input quota. It is not possible to distribute this input (unless the mobile user overrides a warning message on the mobile phone app to distribute anyway without approval.)
Expired	This is a quota assignment that is beyond the requested time frame. It is not possible to distribute this input.
Pending	This is when a quota assignment has been assigned or approved, but the time frame for the input quota has not yet started. It is not possible to distribute this input yet.
Inactive	This is when an input request's operation status is set as inactive. It is not possible to distribute this input while it is inactive.

Parent topic: [Managing Inputs \[page 69\]](#)

## Related Information

[Assigning Input Quotas \[page 70\]](#)

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[Viewing all Quotas Assigned to an Organization \[page 75\]](#)

## 6.8 Managing Surveys

Administrators of the Rural Sourcing Management system may want to ask small-holder farmers questions in order to gather information about them. The survey function of the mobile phone app helps to do this.

An administrator can create a survey with questions and assign it to individual farmers or groups of farmers to take. Surveys can collect important data about farmer demographics, about their farming practices and beliefs, about their perceived productivity and quality, about what additional training they would like to receive, and many other topics that might be important for improving the organization.

After farmers have taken a survey using the mobile phone app, it is possible to download the answers from the administrator system and analyze them to gain more understanding about the farmers. Answers to surveys can also be analyzed using the SAP Analytics Cloud (SAC).

The following sections provide detailed information about how to create, upload, and assign a survey to farmers. It also provides information about downloading the answers from a survey and deactivating a survey when it is no longer relevant.

[Creating and Uploading Surveys \[page 78\]](#)

For a survey to be available on the mobile phone app for farmers to take, it is first necessary to create the survey in an Excel sheet and upload it to the administrator system.

[Assigning a Survey to Farmers \[page 85\]](#)

Assigning a survey to farmers will make it available for them to take on the mobile phone app.

[Viewing and Editing Assigned Surveys \[page 86\]](#)

As an Administrator, you can view all surveys and edit survey assignments from the Survey List page.

[Deactivating a Survey \[page 87\]](#)

When a survey is no longer relevant for your purposes and you do not want to assign it to any other farmers, you can deactivate it.

**Parent topic:** [Management Transactions \[page 48\]](#)

### Related Information

[Batch Data Administration \[page 49\]](#)

[Managing Users \[page 54\]](#)

[Managing and Monitoring Master Data \[page 56\]](#)

[Managing Groups \[page 62\]](#)

[Managing Trainings \[page 65\]](#)

[Managing Price Information \[page 68\]](#)

[Managing Inputs \[page 69\]](#)

[Managing Cases \[page 88\]](#)

[Managing Activities \[page 92\]](#)

## 6.8.1 Creating and Uploading Surveys

For a survey to be available on the mobile phone app for farmers to take, it is first necessary to create the survey in an Excel sheet and upload it to the administrator system.

Use the following instructions to create your own surveys, tailored to the kinds of questions you need to ask of the farmers in your organization.

There are two main steps involved:

1. Fill out the survey template Excel sheet.
2. Upload the completed Survey Excel Sheet to the Administrator System.

### Step 1: Fill out the Survey Template Excel sheet

#### General Rules:

- Use the Survey Template Excel file you received from SAP for creating surveys.
  - Develop the survey questions directly in the Excel file.
  - Each question will have its own row in the Excel file.
  - The table below will explain each section you must fill out for each question in the Survey Template.
- After you have finished creating the survey questions, save the Excel file to your computer in a location that you will remember, such as on your Desktop or in a specific folder. You will need to know this location during the upload process.

#### Name the Excel Sheet

- At the bottom of the Excel sheet, there is a tab with a name. This is the name of the survey which will be displayed in the Administrator System.
- To rename the survey, right click on the tab and select *Rename*.
- You can type in the name you want the survey to have in the Administrator System.

#### i Note

If you are **updating** a survey that has been uploaded before on the Administrator System and you want to replace the existing survey, keep the sheet name the same as the one currently in the Administrator System.

If you are creating a NEW survey, rename the sheet with a new name. **If you do not rename the sheet and it has the same name as a survey that currently exists in the Administrator System, you will accidentally replace the one currently in the system.**

## ⚠ Caution

Do not change the name of the tab called "Data Validation (do not touch)". Do not change anything within that tab either. It includes important codes that cannot be changed.

### Rows 1-3 Survey Details

- **Row 1 - Language Code** - Enter a two-letter language code:
  - **en** for English
  - **fr** for French
  - **id** for Indonesian
- **Row 2 - Title** - Enter a title for the survey. This title will display in the mobile application when the user selects the survey.
- **Row 3 - Overview Title** - Enter an overview title for the survey to further explain what the survey is for. This title will display in the mobile application when the survey is opened.

Column	Title	Entry
A	Code	<ul style="list-style-type: none"><li>• Each question in the survey needs to have a unique question code.</li><li>• The code for the question asking the <b>farmer's name</b> <b>MUST</b> be <b>farmer1</b>.</li><li>• Codes for all other questions can be any combination of words and numbers, as long as each one in the survey is unique.</li><li>• Examples could include:<ul style="list-style-type: none"><li>• Farmer2</li><li>• Farmer2.1</li><li>• Crops1</li></ul></li></ul>
B	Short Title	This is the title of the question. It is displayed above the full question in the survey on the mobile phone app.
C	Question	This is the full question that will be displayed in the survey on the mobile phone app. It is the question that the farmer will need to answer.
D	Unit	<p>If the answer to the question requires a unit of measurement, enter it here. This unit will display in brackets next to the question to indicate to the user what unit of measurement he/she should answer in.</p> <ul style="list-style-type: none"><li>• For example, if the question is "How much land do you own?"; you should write "hectares" or "acres" in the <i>Unit</i> column.</li><li>• For example, if the question is "What is the interest rate on your loan?"; you should write "%" in the <i>Unit</i> column.</li><li>• For example, if the question is "How long have you grown this crop?"; you should write "months" or "years" in the <i>Unit</i> column.</li></ul>

Column	Title	Entry
E	Recurrence Group ID	<ul style="list-style-type: none"> <li>• If the question can be answered multiple times with multiple sub-questions, it needs a <i>Recurrence Group ID</i>.</li> <li>• The farmer's answer to the main question determines how many times the survey should generate each of the sub-questions connected to it.</li> <li>• Do not write anything in Column E of the main question.</li> <li>• For each of the sub-questions, create a <i>Recurrence Group ID</i>. Type a word twice, separated by ##</li> <li>• For example, if the main question is "How many persons live in your household?", if the farmer answers "4", the sub-questions that follow it will be asked 4 times so the farmer can enter the information about each of the 4 family members.</li> </ul>
F	Required	<ul style="list-style-type: none"> <li>• Decide if the question must be answered or not.</li> <li>• If an answer is required for the question, enter "yes" in this column.</li> <li>• If an answer is not required for the question and can be skipped, enter "no" in this column.</li> </ul>
G	Input Field Type	<p>This determines the kind of answers permitted for the question. Enter one of the following:</p> <ul style="list-style-type: none"> <li>• <b>Date picker:</b> The answer must be a date, selected from a mini calendar.</li> <li>• <b>Person picker:</b> The answer must be the name of a person registered in the Rural Sourcing Management System, selected from a list of registered people.</li> <li>• <b>Organization picker:</b> The answer must be the name of an organization registered in the Rural Sourcing Management System, selected from a list of organizations.</li> <li>• <b>Number field:</b> The answer must be a number (written as an integer like "1", not as a word like "one").</li> <li>• <b>Text field:</b> The answer can be any text, including all words and numbers.</li> <li>• <b>Drop-down menu:</b> The answer must be ONE answer, selected from a pre-determined list of possible answers.</li> <li>• <b>Radio button group:</b> The answer must be ONE answer, selected from two or more possible pre-determined possible answers.</li> <li>• <b>Check boxes:</b> There could be MULTIPLE answers, selected from a pre-determined list of possible answers.</li> </ul>

Column	Title	Entry
H	Restrict Values to Be	<ul style="list-style-type: none"> <li>This allows you to set some controls on how a question is answered. Enter one of the following: <ul style="list-style-type: none"> <li><b>Any:</b> This means the answer can be any word or number.</li> <li><b>Contained in enumeration:</b> This means you want to list the possible answers for the farmer to choose from. You will enter the possible answers in Column I.</li> <li><b>Positive integer including 0:</b> This is any positive WHOLE number including 0. For example: 0, 1, 15, 25, 2000.</li> <li><b>Positive integer excluding 0:</b> This is any positive WHOLE number, excluding 0: For example: 1, 15, 25, 2000.</li> <li><b>Positive decimal including 0:</b> This is any positive number which can have a decimal, including 0. For example: 0.5, 11.2, 65.5.</li> <li><b>Positive decimal excluding 0:</b> This is any positive number which can have a decimal, excluding 0. For example: 11.2, 65.5.</li> <li><b>Within range:</b> This determines what range the number answer must fall within. You will enter the acceptable range in Columns L and M.</li> </ul> </li> <li>The way you restrict the answers for a question often depends on what type of question you have in the input field type (Column G). <ul style="list-style-type: none"> <li><b>Date picker:</b> Any</li> <li><b>Person picker:</b> Any</li> <li><b>Organization picker:</b> Any</li> <li><b>Number field:</b> Positive integer including 0 (or) positive integer excluding 0 (or) positive decimal including 0 (or) positive decimal excluding 0 (or) Within range</li> <li><b>Text field:</b> Any</li> <li><b>Drop-down menu:</b> Contained in enumeration</li> <li><b>Radio button group:</b> Contained in enumeration</li> <li><b>Check boxes:</b> Contained in enumeration</li> </ul> </li> </ul>

Column	Title	Entry
I	Enumeration Values	<ul style="list-style-type: none"> <li>For a question that you restricted values to be “contained in enumeration” in Column H, you must list the possible answers that farmers will have to pick from in the survey.</li> <li>Create a row for each possible answer in Column I.</li> <li>Type the possible answer twice, separated by ## <ul style="list-style-type: none"> <li>The answer on the left of the ## is the answer that will display in the mobile phone app. The answer on the right of the ## is the answer that will display in the administrator system data. This makes it possible to ask questions to farmers in one language and record their answers in another language.</li> <li>For example: Oui##Yes - Farmers will see “Oui” in the mobile phone app, and the administrator will see “Yes” in the answer data.</li> <li>If both the farmer and the administrator speak the same language, the words can be the same. For example: Yes##Yes</li> </ul> </li> </ul>
J	Exclusive Options	<ul style="list-style-type: none"> <li>For a question where the farmer can select multiple answers (if you chose check boxes for the input field type in Column G), you may want to make one of the answers exclusive.</li> <li>This means that if a farmer chooses that answer, it is not possible to select other answers.</li> <li>For example, if the question is “What kind of fertilizer do you use?”, one possible answer may be “I don’t use fertilizers”. If the farmer chooses this answer, he/she cannot also select other possible answers such as “Urea” or “DAP”.</li> <li>Type the possible exclusive answer twice, separated by ## in Column J.</li> </ul>
K	No Answer Option Title	<ul style="list-style-type: none"> <li>For a question where the farmer can select multiple answers (if you chose check boxes for the input field type in Column G), you may want to make it possible for the farmer not to answer the question.</li> <li>A farmer’s choice not to answer a question is also valuable data to collect.</li> <li>This means that if a farmer chooses the “no answer” option, it is not possible to select other answers.</li> <li>“No Answer” option cannot be chosen if the “required” column is filled.</li> </ul>
L	Min value for range	<ul style="list-style-type: none"> <li>For a question that you restricted the answer to be “within range” in Column H, you must define what range of numbers are possible.</li> <li>Enter the minimum possible number in Column L.</li> <li>For example, if the question is “How many months in a year do you farm?”, you may want to make the minimum possible answer “1”.</li> </ul>

Column	Title	Entry
M	Max value for range	<ul style="list-style-type: none"> <li>For a question that you restricted the answer to be “within range” in Column H, you must define what range of numbers are possible.</li> <li>Enter the maximum possible number in Column M.</li> <li>For example, if the question is “How many months in a year do you farm?”, you may want to make the maximum possible answer “12”.</li> </ul>
N	Show depending on field	<ul style="list-style-type: none"> <li>Some questions will only be displayed if the farmer answered in a certain way to a previous question. These are dependent questions.</li> <li>For example, if a farmer answers “no” to a question like “Do you have a landlord”, it would not make sense to then ask “What is your landlord’s name”. The question about the landlord’s name will only be asked if the farmer said that they do have a landlord.</li> <li>In Column N of the dependent question, write the question code of the original question which the dependent question depends.</li> </ul>
O	Show if value of related field is any of...	<ul style="list-style-type: none"> <li>This determines what answer must be selected in an original question in order for the dependent question to display.</li> <li>Write the answer that must be selected in the original question in Column O of the dependent question.</li> </ul>
P	Icon	<ul style="list-style-type: none"> <li>This is the icon that will be displayed next to the question in the mobile phone app.</li> <li>Check the “Data Validation (do not touch)” tab to see the list of possible icons that can be entered into Column P.</li> </ul>
Q	Filter	<ul style="list-style-type: none"> <li>It is possible for authorised users to view the answers to a farmer’s filled out survey in the information section of the Survey function on the mobile phone app.</li> <li>You need to choose one question in the survey that will be used to find a farmer’s filled out survey.</li> <li>Often times, you will want to choose the question that asks the farmer’s name. This means that if you are looking for a particular farmer’s answers to a survey, you can search by their name and find it in the information section of the Survey function on the mobile phone app.</li> <li>Place an “X” in Column Q for the question you want to use for this.</li> <li>Only one question can be chosen for this.</li> </ul>

Column	Title	Entry
R	View Restriction	<ul style="list-style-type: none"> <li>It is possible for authorised users to view the answers to a farmer's filled out survey in the information section of the Survey function on the mobile phone app.</li> <li>You can choose which question answers will display in the survey overview when the answers are viewed in the information section of the Survey function on the mobile phone app.</li> <li>For example, you likely want to be able to see the date of the survey and farmer's name as well as some other key information collected by the survey.</li> <li>There are 4 possible positions where answers can be displayed in the overview: <ul style="list-style-type: none"> <li>Row 1 left</li> <li>Row 1 right</li> <li>Row 2 left</li> <li>Row 2 right</li> </ul> </li> <li>Enter these positions in Column R of the questions you want displayed in the overview.</li> </ul>
S	View Restriction	<ul style="list-style-type: none"> <li>This determines who can view the answers to the survey.</li> <li>This means that only users in the same organization as the interviewed farmers can see their survey answers.</li> </ul>
T	Number of Question Groups of Type	If the question is a main question with sub-questions, the Recurrence Group ID entered in Column E of the sub-questions needs to be entered in Column T of the main question.

## Step 2: Upload the completed Survey Excel Sheet to the Administrator System

Once you've completed the template for your survey, you need to upload it to the Administrator System. Take the following steps.

1. Click on the [Survey](#) tab on the left side of the screen.
2. Click on the [Definitions Import](#) page.
3. In the pop-up window, search for and click on the file you created and saved when you filled out the Survey Template Excel sheet in the main step above. Click [Open](#) in the pop-up window. You will then see the name of the Survey Excel sheet in the box.
4. Click on the white [Upload](#) button.
5. After a few seconds (when the system has uploaded the Survey Excel sheet) the green [Activate](#) button will be enabled. Click [Activate](#).

Parent topic: [Managing Surveys \[page 77\]](#)

## Related Information

[Assigning a Survey to Farmers \[page 85\]](#)

[Viewing and Editing Assigned Surveys \[page 86\]](#)

[Deactivating a Survey \[page 87\]](#)

## 6.8.2 Assigning a Survey to Farmers

Assigning a survey to farmers will make it available for them to take on the mobile phone app.

### Context

After creating and uploading a survey, the next step is to assign it to farmers. You will decide which survey to assign, which farmers to assign it to, the time frame during which they should take it, and who (field agents/ Lead Farmers) should administer the survey.

#### i Note

You must first create and upload a survey before you can assign it. See [Creating and Uploading Surveys \[page 78\]](#) for details.

### Procedure

1. Click on the *Survey* tab on the left side of the screen.
2. Click on the *Survey List* page.
3. In the Survey List, select the survey that you want to assign.
4. Click *Assign* on the top right part of the page.
5. Click *Add* the top left of the pop-up screen.
6. On the next screen that displays, choose to whom to assign the survey. Click on the circle next to one of the following:
  - *Specific Individuals* - select this if you want to assign the survey to just a few, specific farmers that you choose individually.
  - *Random Individuals* - select this if you want to assign the survey to a few, random individuals in a particular group or organization of your choosing.
  - *Groups & Organizations* - select this if you want to assign the survey to ALL of the farmers in groups or organizations of your choosing.
7. Click *Step 2*.
8. On the next screen that displays, enter the time frame during which the chosen farmers should take the survey.

- **Start Date** - The Start Date is the first date that the survey will be available to take in the mobile phone app.
  - **End Date** - The End Date is the last date that the survey will be available to take in the mobile phone app.
9. Click **Step 3**.
  10. On the next screen that displays, choose which users will be allowed to access the survey and administer it to the selected farmers.
    - Type in the name(s) of the role(s) that users must have in order to administer the survey to farmers.
  11. Click **Step 4**.
  12. On the next screen that displays, choose which farmers will take the survey.
    - If you selected **Specific Individuals** to take the survey, choose exactly who you want to take the survey. You can filter to find the individuals within a certain organization or you can type in the names of the individuals in the search bar. Select the individuals you want to take the survey by checking the box next to their name(s).
    - If you selected **Random Individuals** to take the survey, type in the number of farmers you want to take the survey in each selected organization. Then select the organization(s)/group(s) those random individuals should belong to by checking the box next to the organization/group names. You can also search for the name of the organization/group you want in the search bar.
    - If you selected **Groups & Organizations** to take the survey, choose which organization(s)/group(s) you want to take the survey by checking the box next to the organization/group names. You can also search for the name of the organization/group you want in the search bar.
  13. Click **Submit**.

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## Related Information

[Creating and Uploading Surveys \[page 78\]](#)

[Viewing and Editing Assigned Surveys \[page 86\]](#)

[Deactivating a Survey \[page 87\]](#)

## 6.8.3 Viewing and Editing Assigned Surveys

As an Administrator, you can view all surveys and edit survey assignments from the Survey List page.

### Procedure

1. Click on the **Survey** tab on the left side of the screen.

2. Click on the [Survey List](#) page.
3. In the Survey List, select the survey for which you want to view and edit assignments.

The pop-up screen will display all of the current assignments for the survey. It shows the start and end date of each assignment, the general details about the farmers or organizations that have been assigned the survey, and the status of the survey (ongoing or completed).

4. To edit an assignment, click on the assignment in the list and click [Edit](#) in the top right part of the screen.

On the Edit screen, you can change the start and end dates of the assignment, the roles that a user must have in order to administer the survey to farmers and the farmers/organizations/groups assigned to take the survey. You cannot change the assignment type (whether the survey is assigned to specific individuals, random individuals or all individuals in specific groups/organizations).

5. After you have made the necessary changes, click [Submit](#) and the assignment details will be updated.

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## Related Information

[Creating and Uploading Surveys \[page 78\]](#)

[Assigning a Survey to Farmers \[page 85\]](#)

[Deactivating a Survey \[page 87\]](#)

## 6.8.4 Deactivating a Survey

When a survey is no longer relevant for your purposes and you do not want to assign it to any other farmers, you can deactivate it.

### Context

Once you deactivate a survey, it is no longer available for assignment to farmers.

### Procedure

1. Click on the [Survey](#) tab at the left side of the screen.
2. Click on the [Survey List](#) page.
3. In the Survey List, select the survey that you want to deactivate.
4. Click [Deactivate](#) in the top right part of the screen.
5. Click [Yes](#) at the confirmation prompt to deactivate the survey.

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## Related Information

[Creating and Uploading Surveys \[page 78\]](#)

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[Viewing and Editing Assigned Surveys \[page 86\]](#)

## 6.9 Managing Cases

The SAP Rural Sourcing Management administrator can create case templates for flagging if a farmer is violating one of the organization's rules, regulations, or standards.

A case template includes:

- *Case name* - this usually describes the type of non-compliance
- *Action* - this is the action that should be taken if the farmer is non-compliant and violating a rule, regulation, or standard. The available actions are **Warn**, **Suspend**, or **Expel**.
- *Action duration* - this indicates how long the selected action is effective
- *Operation status* - this tells if the case template is active or inactive in the system
- *Risk parameters* - these are the survey questions (and respective answers) that are analyzed to see if a farmer is non-compliant

### Viewing Case Templates

The Overview screen of Case Management contains the following columns of information, starting from the far left:

- Names of each case template
- The action that should be taken if a farmer is non-compliant in the case - some cases may require a warning while others may require a suspension or expulsion
- The number of days that the action is effective
- The operation status of the case template - a green check mark means the case template is **ACTIVE** in the system, and a red cross mark means the case template is **INACTIVE** in the system
- The number of risk parameters that have been set for determining compliance or non-compliance in the case

- **i Note**

Select the risk parameters to display a dialog box that shows the details of the risk parameters.

[Adding a Case Template \[page 89\]](#)

You can add case templates from the *Case Management* page.

[Editing a Case Template \[page 90\]](#)

You can edit case templates from the *Case Management* page.

[Adding and Editing Risk Parameters for Case Templates \[page 91\]](#)

You can add and edit risk parameters for case templates from the case template details page.

**Parent topic:** [Management Transactions \[page 48\]](#)

## Related Information

[Batch Data Administration \[page 49\]](#)

[Managing Users \[page 54\]](#)

[Managing and Monitoring Master Data \[page 56\]](#)

[Managing Groups \[page 62\]](#)

[Managing Trainings \[page 65\]](#)

[Managing Price Information \[page 68\]](#)

[Managing Inputs \[page 69\]](#)

[Managing Surveys \[page 77\]](#)

[Managing Activities \[page 92\]](#)

## 6.9.1 Adding a Case Template

You can add case templates from the *Case Management* page.

### Procedure

1. Select the *Case Management* page.
2. Select *Add* from the top right of the *Case Management* page.  
A blank template page displays where you need to add the details for the new case template.
3. Enter the details for the new case template including:
  - a. *Name* of the case template
  - b. *Action* that should be taken in case a farmer is non-compliant for this case
  - c. *Duration* of time the action will be effective
  - d. *Operation Status* of the case template
4. Select *Save*.  
The new case template will be saved and will display in the case template list.

**Task overview:** [Managing Cases \[page 88\]](#)

## Related Information

[Editing a Case Template \[page 90\]](#)

[Adding and Editing Risk Parameters for Case Templates \[page 91\]](#)

## 6.9.2 Editing a Case Template

You can edit case templates from the *Case Management* page.

### Procedure

1. Select the *Case Management* page.
2. Select a case template from the list and select *Edit* from the top right of the *Case Management* page.  
The details of the select case template are displayed.
3. You can change the following fields:
  - a. *Name* of the case template
  - b. *Action* to be taken if a farmer is non-compliant in the case
  - c. *Duration* the action will be effective
  - d. *Operation Status* of the case can be set from *Active* (green check mark) to *Inactive* (red cross).
4. Select *Save* to save the changes you made.

**Task overview:** [Managing Cases \[page 88\]](#)

## Related Information

[Adding a Case Template \[page 89\]](#)

[Adding and Editing Risk Parameters for Case Templates \[page 91\]](#)

## 6.9.3 Adding and Editing Risk Parameters for Case Templates

You can add and edit risk parameters for case templates from the case template details page.

### Procedure

1. Select the [Case Management](#) page.
2. Select a case template from the list and select its corresponding [Risk Parameters](#) option in the far-right of its row.

A dialog displays with the list of parameters set for the case template.

3. To add a new parameter, select [Add](#) in the top right of the dialog box.
  - a. You first must choose the survey question to use as a parameter for judging compliance or non-compliance.
  - b. The [Value Type](#) of the survey will be filled in automatically.
  - c. Enter the value (answer) that will signal **NON-COMPLIANCE**.

For example, if the question was “Do the farmer’s children go to school?” and the NON-COMPLIANT answer is “No”, the value **No** must be entered.

For example, if the question was “Did the farmer cut down trees to expand his farming land?” and the NON-COMPLIANT answer is “Yes”, the value **Yes** must be entered.

- d. You must finally set the risk score impact for the question. A case will be flagged as NON-COMPLAINT if the answers across ALL risk parameters add up to 100 or more.
  - e. Select the green check mark to save the new parameter or select the red cross mark to delete the parameter.
4. To edit an existing parameter, select [Edit](#) in the row for the parameter you want to change.

The row you selected becomes editable.

You can edit the survey question, the value that signals NON-COMPLIANCE, as well as the risk score for the parameter.

Select the green check mark to save the parameter updates or select the red cross mark to delete the parameter.

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### Related Information

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[Editing a Case Template \[page 90\]](#)

## 6.10 Managing Activities

The SAP Rural Sourcing Management administrator can create, assign, and schedule activities for field agents to conduct with farmers/groups/organizations.

Activities could include surveys, farm mapping, training, input distribution, and case management activities such as child labor monitoring visits.

After these activities have been created, scheduled, and assigned in the administrator system, they will be available for field agents to conduct in the respective functions of the mobile phone app. Field agents can view all of the different activities to conduct with different farmers in the *Activity Planning* function.

### Viewing Scheduled Activities

All scheduled activities are sorted by activity category and can be seen in the activity list in the left column.

Below the activity name, the number of times the activity has been scheduled and assigned is indicated.

You can adjust the time period filter in the center above the calendar view, to see the scheduled activities by the hour, day, week, or months.

#### [Adding and Editing an Activity \[page 93\]](#)

The SAP Rural Sourcing Management administrator can create new activities for field agents and edit existing activities.

#### [Scheduling an Activity \[page 94\]](#)

The SAP Rural Sourcing Management administrator can schedule activities for field agents.

#### [Assigning an Activity from the Activities List \[page 94\]](#)

The SAP Rural Sourcing Management administrator can assign an activity to farmers from the left column of the activities list.

#### [Assigning an Activity from the Calendar View \[page 95\]](#)

The SAP Rural Sourcing Management administrator can assign an activity to farmers directly from the calendar view.

#### [Viewing and Editing Assigned Activities \[page 96\]](#)

The SAP Rural Sourcing Management administrator can view and edit assigned activities.

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## Related Information

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## 6.10.1 Adding and Editing an Activity

The SAP Rural Sourcing Management administrator can create new activities for field agents and edit existing activities.

### Procedure

1. To add a new activity, open the activities list and select [Add](#).

Enter the following details for the new activity:

- Activity category
- Activity type
- Activity name
- Operation status for the new activity

2. To edit an existing activity, select an activity from the list and select [Edit](#) from the top right of the page.

You can edit the activity category, activity type, activity name, and operation status.

#### Caution

Changing the activity type will have implications for the actions taken in the field and may be confusing for mobile users.

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### Related Information

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## 6.10.2 Scheduling an Activity

The SAP Rural Sourcing Management administrator can schedule activities for field agents.

### Procedure

1. Select an activity from the activities list in the left column and select Schedule.

A dialog box is displayed with the name of the selected activity pre-filled.

2. Enter a *Start Date* and an *End Date* for the activity's schedule.

The Start Date means the activity is available for selection and completion in the mobile app starting on this date.

The activity won't be available for execution anymore after the assigned End Date.

3. Set the *Operation Status* of the scheduled activity to Active.
4. Select an *Organization* for which the activity should be valid.
5. *Save* the schedule.

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### Related Information

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## 6.10.3 Assigning an Activity from the Activities List

The SAP Rural Sourcing Management administrator can assign an activity to farmers from the left column of the activities list.

### Procedure

1. Select the activity you want to assign from the activity list and select *Assign*.

A dialog box displays with the activity details.

2. Select *Add* at the top left of the dialog box.

3. Assign individual farmers or organizations to the selected activity. You can assign the activity to specific individuals, by choosing only a few specific farmers, or to groups and organizations by assigning the activity to ALL farmers part of the chosen group or organization.

The filter can be used to find the individuals within a certain organization, or you can type names into the search bar.

4. Enter the time frame during which the chosen farmers should do the activity.
5. Select *Submit*.

The new activity schedule is created and will display in the calendar.

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## Related Information

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## 6.10.4 Assigning an Activity from the Calendar View

The SAP Rural Sourcing Management administrator can assign an activity to farmers directly from the calendar view.

### Procedure

1. Select the activity you want to assign from the calendar view and select *Create an Assignment*.

A dialog box displays with the activity details.

2. Select *Add* at the top left of the dialog box.
3. Assign individual farmers or organizations to the selected activity. You can assign the activity to specific individuals, by choosing only a few specific farmers, or to groups and organizations by assigning the activity to ALL farmers part of the chosen group or organization.

The filter can be used to find the individuals within a certain organization, or you can type names into the search bar.

4. Enter the time frame during which the chosen farmers should do the activity.
5. Select *Submit*.

The new activity schedule is created and will display in the calendar.

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## Related Information

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## 6.10.5 Viewing and Editing Assigned Activities

The SAP Rural Sourcing Management administrator can view and edit assigned activities.

### Procedure

1. Select an activity from the activity list or from the calendar view and select *Assign*.

The following details are displayed:

- Start Date and End Date of each assignment
- Details about the farmers or organizations that have been assigned the activity
- The status of the activity (**Active** or **Expired**)
- Completion Status of the activity, making it visible how many farmers have been assigned the activity compared to how many have completed it already

2. To edit an assignment, select the assignment in the list and select *Edit* in the top right of the screen.
3. You can adjust the start and end dates of the assignment and the farmers/organizations/groups assigned to the activity.

You cannot change the assignment type (whether the survey is assigned to specific individuals or all individuals in specific groups/organizations).

4. To cancel an assignment, select *Cancel* from the top right of the page.

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# 7 Introduction to the SAP Analytics Cloud

The SAP Analytics Cloud (SAC) is a platform which allows organizations with *SAP Rural Sourcing Management* system to gather business intelligence, plan for their business' future, and predict the success of possible business decisions.

Your organization's *Rural Sourcing Management* system collects a lot of relevant data about farmers, crops, inputs, transactions, processes, etc. It is important for you to be able to access, use and analyze this data in a simple way so you can learn from and improve your organization and make rational decisions that are supported by data.

Using SAP Analytics Cloud, with *Rural Sourcing Management* system, you can:

- *Gather business intelligence* - It organizes your data in way that helps you understand the business including what is working and what should be improved.
- *Plan for the businesses' future* - It helps you to analyze your business and plan future actions.
- *Predict the success of possible business decisions* - It helps you forecast the outcome of different plans based on historical data so you can better decide which plans will make the business most successful.

The SAC uses "Dashboards". Dashboards are information management tools used to visually track, view, organize, analyze and simulate data collected by your *Rural Sourcing Management* system. They display Key Performance Indicators (KPI), metrics and key data points using the data your system has collected.

The following sections provide information about 15 example dashboards that can be used to view, organize, and analyze data collected in *Rural Sourcing Management* system. In each of the dashboards, you will be able to see relevant data that supports the business and helps in making decisions which are critical for the health and success of the business. It is possible to customize each dashboard to only display the relevant and captured data that is useful for your purposes. It is also possible to customize the home dashboard to display the most important KPIs for your business.

It is important to note that only the data that is captured in your system can be displayed in the different dashboards and some KPIs may require specific combinations of captured data.

## [Farmer Dashboard \[page 99\]](#)

The *Farmer Dashboard* helps to give you an overview picture of the characteristics of a group of farmers, an individual farmer, or a farm.

## [Payment Details Dashboard \[page 100\]](#)

The *Payment Details Dashboard* provides you with the payment details for a specific farmer or all of the farmers within a specific organization.

## [Overview of Payments Due Dashboard \[page 101\]](#)

The *Overview of Payments Due Dashboard* helps you to see the total amount of money that all farmers within an organization should receive by a certain time.

## [Productivity Dashboard \[page 102\]](#)

The *Productivity Dashboard* helps to show you the productivity of all farmers in an organization or a specific farmer or farm.

## [Farmer Development Plan Dashboard \[page 104\]](#)

The *Farmer Development Plan Dashboard* helps to show you how farmers have been improving as a result of participating in training sessions and surveys.

#### [Delivery Dashboard \[page 105\]](#)

The *Delivery Dashboard* helps to show all the deliveries from an individual farmer, a farmer's farm, or all the farmers within an organization.

#### [Inputs Dashboard \[page 106\]](#)

The *Inputs Dashboard* helps to show the inputs distributed to an individual farmer or to all the farmers in an organization.

#### [Product Movement Dashboard \[page 107\]](#)

The *Product Movement Dashboard* digitally visualizes the movement of physical goods in the *SAP Rural Sourcing Management* system.

#### [Organizations Dashboard \[page 108\]](#)

The *Organizations Dashboard* helps to show the different organizations in your *SAP Rural Sourcing Management* system and their product stocks such as crops and inputs.

#### [Season Dashboard \[page 109\]](#)

The *Season Dashboard* helps you to see different Key Performance Indicators (KPIs) according to the agricultural seasons.

#### [Price Dashboard \[page 110\]](#)

The *Price Dashboard* helps you see how prices for products have changed and developed over time. Products can be inputs or crops.

#### [Loan Dashboard \[page 111\]](#)

The *Loan Dashboard* helps you see the loan applications for an individual farmer or all farmers within a specific organization.

#### [Certification Auditing Dashboard \[page 112\]](#)

The *Certification Auditing Dashboard* helps you see the certifications for an individual farmer or all farmers within a specific organization.

#### [Coach Management Dashboard \[page 113\]](#)

The *Coach Management Dashboard* helps you to see all the people who are coaches or trainers at your organization as well as their current training and survey assignments.

#### [System Management Dashboard \[page 114\]](#)

The *System Management Dashboard* helps you to get an insight into the current operation of the *SAP Rural Sourcing Management* system.

## 7.1 Farmer Dashboard

The *Farmer Dashboard* helps to give you an overview picture of the characteristics of a group of farmers, an individual farmer, or a farm.

For example, it can be used to visualize which farmers or farms are most productive according to specific metrics such as the size of land, the location or the type of crop. It can also be used to show which farmers are meeting their delivery measures in terms of quantity, value, price, and quality.

It can help your business to understand your farmers/farmer groups better and get to know which are the most successful/productive and which need extra support or inputs to meet their targets. You can also use this data to uncover possible reasons as to why some farmers/farmer groups excel and some struggle.

The following examples can give you an impression of what might be possible to display and analyze in this dashboard:

- Demographics of a farmer such as *Education*, *Gender*, and *Age*
- Geographical information like the *Location* of the farmers and the *Shape* of their farms
- *Productivity* or *Quality indicators* for farmers or a farm which can help to point out problems of a farmer, a farm, a region or an entire supply chain
- First insight on the farmer's transaction data which can be enriched to show the *Quality indicators* for the farmer and the *Input values* by product
- Different measures can also be directly compared to each other like the *Buying value* for a farmer's crops can be compared to the *Delivery agreement* and *Input value*
- *Payment values* or *Balances* can be shown in order to see what has been paid to a farmer for a specific time frame or if the farmer's account is balanced without any *Outstanding payments* or *Debts*
- *Trainings* and *Surveys* farmers have completed

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## Related Information

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## 7.2 Payment Details Dashboard

The *Payment Details Dashboard* provides you with the payment details for a specific farmer or all of the farmers within a specific organization.

The dashboard also allows you to see the historical data about payments. It can show the amounts a farmer or group of farmers have been paid over time. This is important for seeing how prices may have fluctuated

depending on the quality of product the farmer/farmer group provided at different points in time. This helps you see how higher quality products are rewarded with higher prices.

The following examples can give you an impression of what might be possible to display and analyze in this dashboard:

- *Payment values* for a farmer/farmer group (total or filtered by time range)
- *Payment development* for a farmer/farmer group as a time series with a *Forecast*
- Payment development with *Training activities* highlighted in the time line
- Payment development paired with *Delivery data* such as *Quality indicators*
- *Average price* and Average price per unit for the farmer/farmer group.
- *Payment types* (e.g., cash, bank, mobile money).

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## 7.3 Overview of Payments Due Dashboard

The *Overview of Payments Due Dashboard* helps you to see the total amount of money that all farmers within an organization should receive by a certain time.

It shows the overall payment that will be due to all farmers, which can help your organization to plan and ensure to have enough money available for the payments. It can also help to notify you when a farmer has not been paid within a certain time frame. This is important so that you are aware if a farmer or group of farmers were not paid correctly when they should have been.

This dashboard visualizes all of the payments due to a group of farmers by displaying all farmers within an organization in a table format. It also shows the different measures connected to calculating total payment

value such as transportation costs, value- or quality-based deductions, or any other value captured along the supply chain.

The dashboard allows you to select a time frame or season for displaying the payment information. It allows you to export the full table or a filtered subset of the data, depending on what you are interested in viewing.

The following data could be used to calculate the payments due:

- *Buying values* for each crop delivery of a farmer
- Agreed *Price* for the delivered product
- *Total value* of the products
- Calculated *Total contribution* to a full truck load
- *Loan* or *Input* deductions
- *Quality* or *Weight* deductions

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## 7.4 Productivity Dashboard

The *Productivity Dashboard* helps to show you the productivity of all farmers in an organization or a specific farmer or farm.

It can compare the productivity of one individual farmer/farm by comparing his other transaction data to the average productivity of all farmers/farms in an organization. That allows you to find out what the most productive farmers do well and what the least productive farmers need to improve. You might base your decision about training topics and inputs provisions on this information.

This dashboard can also help you to identify the productivity per hectare (ha) for all farmers within an organization or individual farmers and farms. Similarly, this can help you see which farmers have the most and least productive hectares, compared to the average. This can also be helpful when planning for future productivity per hectare when new farmers join an organization.

The dashboard marks each farmer with a color using a traffic light system. The farmers which produce above the average are marked with green, those slightly below average are marked with yellow and those far below average are marked with red. This can help you to see quickly which farmers need the most help to increase their productivity and identify reasons their productivity is low in order to remedy it.

The following examples can give you an impression of what might be possible to display and analyze in this dashboard:

- A table of farmers in a selected organization showing their *Productivity*, *Field size*, and how their productivity relates to the *Average farmer's productivity*
- *Top farmers* and *Organizations* according to productivity measures
- *Productivity improvements* or declines over time for individual farmers or organizations
- Farmer productivity according to their *Location* on a map

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## 7.5 Farmer Development Plan Dashboard

The *Farmer Development Plan Dashboard* helps to show you how farmers have been improving as a result of participating in training sessions and surveys.

It can compare how different activities, such as trainings and surveys, have influenced the farmers' productivity so you can see which activities have helped to boost it the most. This dashboard is linked to the data in the productivity dashboard.

This dashboard can help you to make decisions about what trainings to assign to farmers. It shows how likely it is for different trainings to improve farmers' productivity so you can prioritize those trainings.

The following examples can give you an impression of what might be possible to display and analyze in this dashboard:

- The *Trainings* and *Surveys* a farmer has completed as well as those which are planned for the farmer
- *Warnings* where the farmer is overdue to complete a training or survey
- What *Staff member is responsible* for conducting different trainings
- The *Number of trainings* the farmer has completed compared to the *Average number of trainings* per farmer
- The average farmer *Participation rate* for a particular training or survey
- A *time line* which shows a farmer's productivity over a certain period with different trainings they participated in marked on the time line to show which trainings had the highest effect thereafter
- Productivity and *Quality data* for individual farmers

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## 7.6 Delivery Dashboard

The *Delivery Dashboard* helps to show all the deliveries from an individual farmer, a farmer's farm, or all the farmers within an organization.

It shows the deliveries over time so you can easily see where deliveries are highest (peaks) and lowest (valleys) throughout the year. This can help your organization to plan better and anticipate when farmers are primarily delivering their goods and will require payment.

This dashboard also helps with predicting and forecasting future deliveries for a farmer or organization. It can show the quantity of products you can expect to be delivered during a specific time frame in the future using data collected in delivery agreements.

This dashboard also helps show how the quality of products has changed over time. Quality ratings over time are displayed on a time line. This can help you see if the quality of a product has been increasing or decreasing over time. This information can help you to take appropriate measures if quality is decreasing and it can also help you identify what factors contributed to an increase in quality.

The following examples can give you an impression of what might be possible to display and analyze in this dashboard:

- The *Total quantity* and *Value of deliveries* for a farmer or an organization
- The *Average quantity* and *Value of deliveries* for a farmer or organization
- The *Average price* paid per *Delivery unit* as well as the *Average online price*
- A *Time line* showing *Delivery Quantity*, *Value*, and *Quality* as well as the *Average price* and *Actual price* paid per unit over time
- A spider chart showing the distribution of *Quality indicators*

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## 7.7 Inputs Dashboard

The *Inputs Dashboard* helps to show the inputs distributed to an individual farmer or to all the farmers in an organization.

It shows the inputs over time so you can easily see where inputs are highest (peaks) and lowest (valleys) throughout the year. This can help your organization to plan better and anticipate when farmers will require different inputs throughout the year.

This dashboard also helps with predicting and forecasting future inputs needed for a farmer or organization. It can anticipate the quantity of inputs a farmer/organization will need during a specific time frame in the future, according to their land size and delivery agreements they have signed.

This dashboard can also compare an individual farmer's input usage to the average input usage for all farmers according to land size. A map displays which types and quantities of inputs are used in certain regions, so it is possible to see input trends such as higher demand for fertilizers in one area.

The following examples can give you an impression of what might be possible to display and analyze in this dashboard:

- Total *Quantity* and *Value* of each *Input* used by individual farmers or organizations
- *Average quantity* of each input used by individual farmers or organizations
- *Map* showing where different inputs are used and how much of each input is used in each location
- A *time line* showing *Input types*, *Quantity*, and *Value* over time
- *Forecast* of what *Input types* and *Quantities* will be needed for a farmer or organization in the future

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## 7.8 Product Movement Dashboard

The *Product Movement Dashboard* digitally visualizes the movement of physical goods in the *SAP Rural Sourcing Management* system.

It does this by analyzing the geo-information of all buying, loading and offloading transactions for a certain product (e.g., a crop or an input). This data is displayed on a map to geographically show the supply chain of a product.

It helps you to explore supply chains by selecting a certain delivery and tracking it backwards to see its origin. This also allows you to detect disruptions or bottlenecks in the supply chain. The extent of this traceability heavily depends on the individual setup of the *Rural Sourcing Management* system.

The following examples can give you an impression of what might be possible to display and analyze in this dashboard:

- The *Buying* and *Loading/Offloading* connections for a specific product (*Crop* or *Input*)
- All the *Products* that were *Delivered* for only a specific farmer or only a specific organization
- *Transport costs* for a specific product route

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## 7.9 Organizations Dashboard

The *Organizations Dashboard* helps to show the different organizations in your *SAP Rural Sourcing Management* system and their product stocks such as crops and inputs.

Organizations can be displayed on a map in order to show their respective geographical locations.

This dashboard also shows productivity data about individual organizations so they can be compared to each other. This can help you to see which organizations are most and least productive so you can work more with organizations that need to improve their productivity.

This dashboard also shows an organization's current stock and gives you an insight into any losses of goods at the organization. This can help you to track where losses are being made for an organization's products and investigate why this is happening.

The following examples can give you an impression of what might be possible to display and analyze in this dashboard:

- A *Map* showing all *Organizations*, their *Organizational structures*, and their current *Stocks*
- A table showing all *Organizations* and their current *Stocks*
- The *Average product loss* for an *Organization*, comparing *Loading* and *Offloading weights*
- The *Average incoming* and *Outgoing product amounts* for an organization's products
- The *Production loss* at the *Processing center* per *Organization*
- The *Average product quality* at the *Processing center* per *Organization*
- The *Average amount* of *Products processed* at the *Processing center* per *Organization*

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## 7.10 Season Dashboard

The *Season Dashboard* helps you to see different Key Performance Indicators (KPIs) according to the agricultural seasons.

It is possible to compare data from one season to another. This can reveal differences in transaction measures, such as a change in productivity or quality. This data can be the foundation for planning inputs or other activities, so that the yield can be improved.

The following examples can give you an impression of what might be possible to display and analyze in this dashboard:

- *Productivity data* for individual farmers or organizations by *Season*
- Total *Product amount* captured by *Season*
- *Price* paid to farmers for their product by *Season*
- *Product price* when sold to buyers by *Season*
- A time line showing various *KPIs* by *Season*

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## 7.11 Price Dashboard

The *Price Dashboard* helps you see how prices for products have changed and developed over time. Products can be inputs or crops.

It is possible to see the lowest and highest historical price for a specific product. This information can help you plan the price of a product, based on the historical change in price. The dashboard points out different prices assigned to products at different organizations.

This dashboard also shows if a farmer received a higher price for the product than the price originally created for the organization. This gives you valuable information about whether the prices you set for a product are accurate according to the actual price a farmer receives.

The following examples can give you an impression of what might be possible to display and analyze in this dashboard:

- *Price changes* over a period per product
- *Highest* and *Lowest price* recorded for an organization per product
- *Price difference* between the *Online price* and *Actual price* paid per product

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## 7.12 Loan Dashboard

The *Loan Dashboard* helps you see the loan applications for an individual farmer or all farmers within a specific organization.

The dashboard also shows the information about the farmer that may support the loan application including total value of products they have delivered in the past and their track record in fulfilling delivery agreements.

This dashboard can help you to determine if a farmer should receive a loan. It can help you to decide the likelihood that the farmer will repay the loan in full and on time, based on information about his/her past performance.

The following examples can give you an impression of what might be possible to display and analyze in this dashboard:

- List of *Loan applications* per farmer, filterable by organization
- List of *Loan balances* per farmer, filterable by organization
- Past *Delivery values* per farmer compared to their *Delivery agreements*
- Future *Delivery agreement commitments* per farmer
- *Loyalty score* per farmer calculated by comparing *Delivery agreements* to captured *Deliveries* and *Regularity of deliveries*

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## 7.13 Certification Auditing Dashboard

The *Certification Auditing Dashboard* helps you see the certifications for an individual farmer or all farmers within a specific organization.

With this dashboard, it is possible to see the distribution of certifications across all farmers in an organization as well as the distribution of certifications per farmer on a map. This helps you see where farmers with different certifications are located and if some areas have more certified farmers than other areas. This can help you target certain areas where you want farmers to be certified and help them to get certified.

This dashboard makes it easy to see which certifications are most and least common among farmers. It can also show the history of certifications so you can monitor if farmers are losing their certifications over time. This information can help you to ensure that farmers in your organization keep up to date with their certifications such as by conducting trainings.

The following examples can give you an impression of what might be possible to display and analyze in this dashboard:

- The *Total Number of current Certifications* among farmers in an organization or specific geographical area by types
- The *History* of a specific farmer's *Certifications* over time
- A *Map* showing where all farmers are located who have a selected *Certification*
- Data supporting *Certifications* such as *Input amounts* and *Types*, *Productivity data*, *Training history*, socio-economic indicators like *Gender* and *Survey data* as well as *Quality indicators* and *Farm details* such as *Size* and *Location*

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## 7.14 Coach Management Dashboard

The *Coach Management Dashboard* helps you to see all the people who are coaches or trainers at your organization as well as their current training and survey assignments.

You can see the total number of farmers each coach is working with. This helps you to monitor the workload of your coaches and helps you to see the trainings and surveys which are expected to be conducted with farmers over a certain period.

This dashboard also helps you to see the performance and productivity of the farmers who are coached or trained by specific coaches. It is possible to compare coaches' effectiveness according to the productivity of the farmers they coach. This can help you to determine if the productivity of farmers increased after being trained by a specific coach. This may help to give you an insight into which coaches are most effective and which may need additional support or training. You can use this information to create incentives or performance awards for the most effective coaches.

This dashboard also shows the geographical area covered by each coach. This can help you to identify if you have too many coaches operating in one area or if you have areas where no coaches are working with farmers.

The following examples can give you an impression of what might be possible to display and analyze in this dashboard:

- *Number of farmers* for which each *Coach* is *Responsible*
- A *Map* with color-coding to show the area that each coach is responsible
- The *Average productivity* of farmers in a specific coach's area
- *Coach performance* according to the *Productivity* of the farmers in their area compared to other coaches
- The *Average number of Certifications* by type for farmers in a specific coach's area
- The *Average number of Trainings* per farmer
- The *Number of trainings* performed by each coach compared to other coaches
- The *Number of trainings* and *Surveys* planned for each coach to conduct
- *Coach payment details* and *Records*

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## 7.15 System Management Dashboard

The *System Management Dashboard* helps you to get an insight into the current operation of the *SAP Rural Sourcing Management* system.

It shows various KPIs relevant to system status such as how many users are in the system, how many registered farmers there are, and how many transactions are happening throughout the entire system. It also allows you to track the KPIs to see how the system is growing and developing over time.

This dashboard is useful for determining if system functions, such as onboarding of users and farmers as well as number of transactions, is slowing down, or speeding up. It also helps you to see if there are problems in certain areas of the system. If geographical information is available, this dashboard allows you to see the changes in the system KPIs on a map so you can see where users and farmers are being onboarded as well as where the most and the least transactions are happening.

The following examples can give you an impression of what might be possible to display and analyze in this dashboard:

- The *Number of users* by their *Role*
- The *Number of users onboarded* at different times shown on a time line
- *Usage statistics* per user (e.g., *Captured farmers*, *Transactions*, *Sync amount*)
- The total number of *Syncs*, *Sync times*, and *Average bandwidth*
- The *Number of syncs* at different times shown on a time line
- The *Total* number of registered *Transactions*
- The number of registered *Transactions by user*
- The number of registered *Transactions* at different times shown on a *Time line*

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# 8 Security

Security is provided for the SAP Rural sourcing Management solution for both the mobile client component as well as the Web Interface component.

Two types of data flow are supported:

- Data flow and storage for the SAPUI5 Client (Web Interface)
- Data flow and storage for the Android Mobile Application (Mobile)

## User Management

Both the SAPUI5 Client and the Android Mobile Client use SAP Cloud Identity.

[Data Flow and Storage for the SAPUI5 Client \(Web Interface\) \[page 116\]](#)

[Data Flow and Storage for the Android Mobile Application \(Mobile\) \[page 117\]](#)

[Two-Factor Authentication \[page 125\]](#)

Two-factor Authentication for logging on to Rural Sourcing Management.

[Security Configuration Recommendations \[page 126\]](#)

## 8.1 Data Flow and Storage for the SAPUI5 Client (Web Interface)

- The user, usually a system administrator or Operations Management, logs into the Web interface using SAP Cloud Identity credentials.
- Master data (such as organizations and persons) is entered through the Web Interface Client.
- Data is transferred to and from the HCP HANA Database using ODATA services.
- Data is stored in a HANA database.
- An Excel report, including all master data and transaction data, can be downloaded via a secure HTTPS channel.

Parent topic: [Security \[page 116\]](#)

## Related Information

[Data Flow and Storage for the Android Mobile Application \(Mobile\) \[page 117\]](#)

## 8.2 Data Flow and Storage for the Android Mobile Application (Mobile)

- On initial start of the application, the user must be authenticated on the SAP Cloud Identity Logon screen using SAML 2.0. The authentication token is retrieved from SAP Cloud Identity and stored in the local SAP Mobile SDK DataVault.
- The SAP Mobile SDK DataVault is encrypted using the user-defined passcode. The passcode is initially set on the SAP Mobile SDK Logon screen during initial user onboarding. The passcode is requested every time the user logs into the app.
- All data (transaction data and master data) is entered through the smart phone mobile client application and stored in a local (Android OS built-in) encrypted (AES-256) SQLite database for offline persistence. Read access to the SQLite database is authorized by the user-specific database key (randomly generated) stored in the DataVault. The user specific database key is randomly generated upon initial onboarding with HCPms and stored in the DataVault.
- The local SQLite database and log files can be exported for debugging purposes. The files are symmetrically encrypted using AES-128 with a random key. The random key is encrypted by the public key of a public-private key pair generated using RSA-1024.
- Data is synchronized with the central HCP server via HTTPS using the SAP Mobile SDK Offline ODATA functionality. The SAP Mobile SDK ODATA Offline Store, used for synchronization, is encrypted using AES-128 with a random key. The random key is stored in the DataVault. During synchronization data flows in both directions. Data stored in the local SQLite database is sent to the server and data relevant for the individual mobile client is sent from the server to the client.

Parent topic: [Security \[page 116\]](#)

### Related Information

[Data Flow and Storage for the SAPUI5 Client \(Web Interface\) \[page 116\]](#)

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## 8.3 Data Protection and Privacy

### 8.3.1 Introduction

This document provides Data protection and Privacy information for SAP Rural Sourcing Management.

Data protection is associated with numerous legal requirements and privacy concerns. In addition to compliance with general data protection and privacy acts, it is necessary to consider compliance with industry-specific legislation in different countries. SAP provides specific features and functions to support compliance with regard to relevant legal requirements, including data protection, which are documented in these templates along with the assumptions that have been guiding the implementation in the software. By nature of legal requirements the conclusion whether these features are covering customer specific demands as well as the conclusion whether additional measures have to be taken is solely with the customer.

#### **i** Note

SAP does not provide legal advice in any form. SAP software supports data protection compliance by providing security features and specific data protection-relevant functions, such as simplified blocking and deletion of personal data. In many cases, compliance with applicable data protection and privacy laws will not be covered by a product feature. Definitions and other terms used in this document are not taken from a particular legal source.

#### **⚠** Caution

The extent to which data protection is supported by technical means depends on secure system operation. Network security, security note implementation, adequate logging of system changes, and appropriate usage of the system are the basic technical requirements for compliance with data privacy legislation and other legislation.

## Generic Fields

To comply with the principle of "data minimization," SAP Rural Sourcing Management is only making use of the following personal data by default:

- First Name
- Last Name
- Gender
- Date of Birth
- Phone Number
- Address
- Truck License Plate
- Farmer Cooperative Membership Number
- Mobile Money Account Number
- Android\_ID of the Smart phone

- GPS Position of the Smart phone
- Facial imagery of farmers

You need to make sure that no personal data enters the system in an uncontrolled or non-purpose related way, for example, in free-text fields, through APIs, or customer extensions. Note that these are not subject to the read access logging (RAL) example configuration.

## 8.3.2 Glossary

Glossary of terms related to data protection and privacy for SAP Rural Sourcing Management.

The following terms are general to SAP products. Not all terms may be relevant for this SAP product.

Term	Definition
Blocking	A method of restricting access to data for which the primary <b>business purpose</b> has ended.
Consent	The action of the data subject confirming that the usage of his or her personal data shall be allowed for a given purpose. The customer must ensure that all personal data entered into the system is from persons that have given consent.
Data Subject	An identified or identifiable natural person. An identifiable natural person is one who can be identified, directly or indirectly, in particular by reference to an identifier such as a name, an identification number, location data, an online identifier or to one or more factors specific to the physical, physiological, genetic, mental, economic, cultural, or social identity of that natural person.
Deletion	Deletion of <b>personal data</b> so that the data is no longer available.
End of Business	Date where the business with a data subject ends, for example, the order is completed, the subscription is canceled, or the last bill is settled.
End of Purpose (EoP)	End of purpose and start of blocking period. The point in time when the primary processing purpose ends, for example, a contract is fulfilled.
Personal Data	Any information relating to an identified or identifiable natural person (a data subject).
Purpose	The information that specifies the reason and the goal for the processing of a specific set of personal data. As a rule, the purpose references the relevant legal basis for the processing of personal data.
Residence Period	The period of time between the end of business and the end of purpose (EoP) for a data set during which the data remains in the database and can be used in case of subsequent processes related to the original purpose. At the end of the longest configured residence period, the data is blocked or deleted. The residence period is part of the overall retention period.
Retention Period	The period of time between the end of the last business activity involving a specific object (for example, a business partner) and the deletion of the corresponding data, subject to applicable laws. The retention period is a combination of the residence period and the blocking period.

Term	Definition
Sensitive Personal Data	<p>A category of personal data that usually includes the following type of information:</p> <ul style="list-style-type: none"> <li>• Special categories of personal data, such as data revealing racial or ethnic origin, political opinions, religious or philosophical beliefs, trade union membership, genetic data, biometric data, data concerning health or sex life or sexual orientation.</li> <li>• Personal data subject to professional secrecy</li> <li>• Personal data relating to criminal or administrative offenses</li> <li>• Personal data concerning insurances and bank or credit card accounts</li> </ul>
Where-used check (WUC)	<p>A process designed to ensure data integrity in the case of potential blocking of business partner data. An application's where-used check (WUC) determines if there is any dependent data for a certain business partner in the database. If dependent data exists, this means the data is still required for business activities. Therefore, the blocking of business partners referenced in the data is prevented.</p>

### 8.3.3 User Consent

User Consent is the action of the data subject confirming that the usage of his or her personal data shall be allowed for a given purpose.

SAP Rural Sourcing Management is not providing functionality to collect the consent directly from the user, i.e., there is no self-service registration. Most persons processed in the system are not actual users logging into the system anyway. As defined in the terms and conditions, customers are responsible to collect consent of all persons who will be processed in SAP Rural Sourcing Management, and to maintain the consent status for all affected persons electronically in our system. This status is a mandatory field for all person entities:

- In the **WebUI master data upload**, the user must check a consent checkbox to confirm that consent of all persons in the master data upload has been provided.
- In the **WebUI person/user creation screens**, the user must check a consent checkbox to confirm that the person/user has provided consent.
- In the **Mobile app producer registration process**, the user must check a *consent checkbox* to confirm that he collected the consent of the person he is registering.

#### i Note

Facial imagery of farmers may be collected with SAP Rural Sourcing Management. Customers are responsible for gathering explicit consent for this.

#### Revoking a Person's Consent

A person's consent can be revoked at any time. When consent is revoked, their data is invisible in the system for the length of the set retention period (see [Deletion of Personal Data \[page 123\]](#) for details).

After the retention period is over, the system will anonymize their data (the data is no longer attached to their name). After the retention period has elapsed, the person's data cannot be recovered and reattached to their name again.

An administrator with the appropriate permissions in the administrator system can revoke a person's consent and deactivate them in the system using the following steps:

1. Select the *Master Data* tab on the left side of the screen.
2. Select the *Persons* page.
3. Click on the person in the list for which you want to revoke consent.
4. Click *Edit* in the top right of the *Persons* page.
5. Change the person's consent from consenting (green check mark) to not consenting (red "x").
6. Click *Save*.
7. Read the warning about revoking consent for the person.
  1. Click *Continue* to revoke their consent and deactivate them from the system.
  2. Click *Cancel* if you do not want to revoke their consent.

### Undo Revoking of a Person's Consent and Reactivating Them in the System

If for some reason a person revoked their consent but changed their mind **before the retention period has elapsed**, their data can be recovered and they can be re-instituted to participate in the system. An administrator with the appropriate permissions in the administrator system can re-institute them using the following steps:

1. Select the *Administration* tab on the left side of the screen.
2. Select the *Retention Period* page.
3. Click on the name of the active retention period.
  - You will see all the persons who revoked their consent while this retention period was in effect. Their data will be anonymized when the retention period has elapsed.
  - If a person revoked their consent when a previous retention period was in effect, their names will be listed when you click on one of the names of retention periods in the "Retention Period History". Their data will be anonymized when the previous retention period days have elapsed.
4. Click on the name of the person for which you want to re-institute consent.
5. Scroll to the bottom of the person's page. Click *Consent* so that it has a green check mark to show the person has given consent again.
6. Click *Save*.

The person is now **Active** again in the system.

#### **i** Note

Only the person has the right to re-institute their consent and be reactivated in the system. A specific request must come from the person to give their consent to participate again.

## 8.3.4 Read Access Logging

Read access logging (RAL) is used to monitor and log read access to sensitive data. Data may be categorized as sensitive by law, by external company policy, or by internal company policy. Read access logging enables you to answer questions about who accessed particular data within a specified time frame. Here are some examples of such questions:

- Who accessed the data of a given business entity, for example a bank account?

- Who accessed personal data, for example of a business partner?
- Which employee accessed personal information, for example religion?
- Which accounts or business partners were accessed by which users?

Customers can have differing needs regarding what data is considered sensitive. In order to meet this requirement for all customers, SAP Rural Sourcing Management provides functionality to log read access to all personal data. This logging functionality is turned on by default, but customers could request to turn off read access logging (and at the same time change logging) if no sensitive personal data collected in the system.

Functionality is included in SAP Rural Sourcing Management to log read access of special categories of sensitive personal data, to be logged in a secure audit store.

Read access logs will be created for all information accessed through the Master Data Excel download and through mobile device synchronization.

Read access logs are created for all Personal Data Type fields for persons registered in the application.

Facial imagery of farmers will be treated as sensitive personal data.

Surveys also may contain sensitive personal data according to customers' individual requirements. Therefore, read access logs are kept for all Survey Assignments (person entities) and Survey Questions. Read access is logged for the export of survey question answers as well as survey objects involved in the mobile synchronization.

For details on how to review the Audit Log, see [Audit Log Review \[page 125\]](#).

## 8.3.5 Information Retrieval

### Download a Person's Personal Information Report

The ability to download a person's personal information report is an important aspect of data rights. Every person who has their data saved in the Rural Sourcing Management system has the right to request and see the data that has been collected about them, as required by law. If someone requests to see the personal data that has been collected about them by the Rural Sourcing Management system, follow the steps below to show it to them or print a copy for them:

1. Select the [Master Data](#) tab on the left side of the screen.
2. Select the [Persons](#) page.
3. Click on the person in the list that you want to download a personal information report about.
4. Click [Download](#) on the top right of the Person's page.
5. Click on the personal information report that you have just downloaded when it appears at the bottom of the screen. The personal information report can also be found in the [Downloads](#) folder of your computer, if you are using a PC computer.
6. The personal information report will open as a PDF file and includes the information recorded about the person in the Rural Sourcing Management system. You can show this to or print this report for the requesting person.

#### **i** Note

You must have the [readMasterData](#) permissions to access the [Information Retrieval](#) functionality.

### ⚠ Caution

Do **not** show a person's personal information page to anyone except the person him/ herself or an authorized administrator of the Rural Management System with the role/permission to see personal data.

## Master Data and Transactional Data Download

Users with an *Administration* role and proper permissions can initiate a download of the master and transactional data listing through the Web Interface. The master data and transactional data download is in the form of an Excel data sheet.

The data file downloaded matches the format and structure of the master data sheet you used to create your initial master data and transactional data.

For full details on downloading master data, see [Master Data Downloads \[page 51\]](#).

The transaction data file downloaded contains all transactions recorded in the system. To excerpt transactions of a specific person, you can filter the raw Excel file by the person ID.

For full details on downloading transactional data, see [Transaction Downloads \[page 50\]](#).

## 8.3.6 Deletion of Personal Data

SAP Rural Sourcing provides features to manage blocking, anonymization, and physical deletion of a person.

- Personal data will be blocked if his/her consent is revoked.
  - Anyone who participates in the Rural Sourcing Management system has a right to revoke their consent to participate at any time and have their data deleted from the system. The standard amount of time for retaining data in the system, after someone's consent has been revoked, is 180 days. This is an amount of time stipulated by General Data Protection Regulation (GDPR).
  - For details on revoking and re-consent of a person's consent please see [User Consent \[page 120\]](#).
- Personal data will be erased after the defined retention period has expired. All the personal data in transactional data of person will be anonymized.

### Changing the Retention Period

The retention period can be adjusted, if necessary, according to local legislation on data protection.

This retention period exists to give the person time to reconsider and re-institute their consent to participate, if they choose, without losing their data.

### ⚠ Caution

When the retention period has passed, all the data connected to the person will be deleted and cannot be recovered.

To change the retention period, do the following:

1. Select the *Administration* tab on the left side of the screen.
2. Select the *Retention Period* page.

3. Click [Change](#) to change the retention period.
4. Enter the information about the new retention period:
  1. *Name* - name of the retention period
  2. *Reason* - reason for change to the retention period (optional)
  3. *Retention Period* - new retention period, in days
  4. *Type* - type of retention period: law or customer
    - This tells whether you are changing the retention period to comply with data protection laws or whether you are changing for your own reasons as the customer.
    - Always check to ensure that the retention period complies with national legislation on data protection.
5. Select [Save](#).
6. Select [Continue](#) on the warning screen to confirm that you want to set the current retention period to inactive and override it with the new retention period you have set.

## 8.3.7 Change Log

Users of SAP Rural Sourcing Management have the ability to update their personal data. All changes are logged and can be monitored.

Change logging enables one to answer questions about who changed personal data within a specified time frame. Here are some examples of such questions:

- Who changed personal data? (e.g., the user with <unique user ID> changed the phone number of a person <unique person ID>)
- What was changed? (e.g., person's phone number was changed from value "123" to "456")

SAP Rural Sourcing Management includes functionality to log changes of all personal data, to be logged in a secure audit store.

Change logs will be created for any change of a Person or User using the SAP Rural Sourcing Management Web Interface and through the Master Data Excel upload.

The change logs contain information about the user doing the change, time of change, the values of the changed attributes before and after the change, and a unique identifier of the changed entity.

For details on how to review the Audit Log, see [Audit Log Review \[page 125\]](#).

## 8.3.8 Audit Log Review

The *Audit Log Review* functionality is available in the *Administration* option of the SAP Rural Sourcing Management Web Interface.

### Context

This feature provides access to the audit logs produced by read access to personal data and changes to personal data.

#### i Note

You must have the *readAuditLogs* permissions to access the *Audit Log Review* functionality.

### Procedure

1. From the start page of the SAP Rural Sourcing Management Web Interface, navigate to the *Administration* section.
2. Select *Audit Log Review*.
3. Optionally enter search criteria in the available search filter fields:
  - a. **<Search>**: Free text search across all available data (e.g., to search for a specific user)
  - b. **<Category>**: Filter for All, Read (read access log), or Update (change log) audit logs
  - c. **<From Date>**: Define the date to mark the start of the search
  - d. **<To Date>**: Define the date to mark the end of the search
4. Click *Search* to show results. To sort the result table, use the sort functions in each table column.

## 8.4 Two-Factor Authentication

Two-factor Authentication for logging on to Rural Sourcing Management.

If two-factor authentication was enabled for you, you must use a recommended authenticator application to authenticate your identify when logging on to the Rural Sourcing Management application. Two-factor authentication provides an extra layer of security to prevent an unauthorized person from logging on as a user.

Examples of two-factor authenticator applications that can be downloaded from Google Play Store onto your mobile phone are:

- Microsoft Authenticator
- Google Authenticator

After downloading and installing a two-factor authentication application, you must register the SAP Rural Sourcing Management application on it.

Parent topic: [Security \[page 116\]](#)

## Related Information

[Data Flow and Storage for the SAPUI5 Client \(Web Interface\) \[page 116\]](#)

[Data Flow and Storage for the Android Mobile Application \(Mobile\) \[page 117\]](#)

[Security Configuration Recommendations \[page 126\]](#)

# User Log-in with Two-Factor Authentication

## Procedure

1. When you log on to Rural Sourcing Management application or the Administrator system after two-factor authentication has been enabled for you, you will be presented with the log-on screen.
2. Enter the username and password and then tap *Log On*.
3. You will then be forwarded to the two-factor authentication page. A detailed step by step description will guide you on how to generate the one-time passcode.
4. After entering the one-time passcode from the Authenticator application, tap *Continue* to log on.

## 8.5 Security Configuration Recommendations

The security recommendations for SAP BTP also apply to SAP Rural Sourcing Management.

Please refer to the following document for further details: [SAP BTP Security Recommendations](#)

Parent topic: [Security \[page 116\]](#)

## Related Information

[Data Flow and Storage for the SAPUI5 Client \(Web Interface\) \[page 116\]](#)

[Data Flow and Storage for the Android Mobile Application \(Mobile\) \[page 117\]](#)



[Two-Factor Authentication \[page 125\]](#)

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