ORGANIC
INTEGRITY DATABASE

USDA ORGANIC

USDA

Agricultural Marketing Service (AMS)
National Organic Program

INTEGRITY Database

User Guide

INTEGRITY Version 11.1

Revision History			
Doc Version	**Web App Version**	**Date**	**Changes**
4.0	11.1	November 29, 2023	Updated with Import Certificate File Upload module.
3.0	11.0	August 10, 2023	Updated with Trade Partner and Import Certificate module.
2.0	9.0	November 2022	Updated all the figures with the new OID Modernized screens
1.0	2.1	March 2016	Initial version

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1. Overview

The Organic INTEGRITY database is an interactive, web-based database of certified organic operations containing reliable, quality information of value to the organic industry and public. INTEGRITY helps the National Organic Program (NOP) deter fraud by providing up-to-date and accurate information on operations certified to USDA organic standards, increasing supply chain transparency, and promoting market visibility for organic operations such as farms, processors, and other handlers of organic items.

The public site allows anyone to search for certified organic operations. A restricted site allows authorized users within Accredited Certifying Agents (Certifiers) to upload and modify data about the operations they have certified.

1.1. System Requirements

Users need a web browser to use the INTEGRITY system: https://organic.ams.usda.gov/Integrity/.

1.2. Types of Accounts

There are three general categories of users for INTEGRITY:

- **Public**: Anyone can search the database and get basic reports, no user account to login is necessary.

- **Certifier**: Employees of Certifiers; These users can upload, create, and modify information, and obtain certification history, for the operations they have certified organic.

- **USDA/NOP**: Employees of USDA National Organic Program. NOP uses INTEGRITY for organic program oversight.

- **Trade Partner Government:** Employees of Trade Partner Government (with USDA equivalence or recognition arrangements). Trade Partner government staff use INTEGRITY for oversight of operations exporting organic products to the U.S.

This document focuses on **Certifier** users.

1.3. Register for Certifier Account

If you are an employee of a Certifier, you can register for a *Certifier Staff* or *Certifier INTEGRITY Lead* account.

- **Certifier Staff Read only** can view operation history, generate reports. All data and functionality available to the public is also available to registered Certifier Staff Read only users.

- **Certifier Staff** users can upload or add data about businesses and products they have certified organic to the database and modify information already in the database. They can also view the certification history for all operations, and who made the changes to operation or scope status for the operations they certified organic.

- **Certifier *INTEGRITY* Leads** are the user account managers for employees of their organization and can approve or reject registration requests for employees of their organization. They can also change user roles and mark user accounts inactive or active.

Certifiers accredited both under the NOP and another program under a USDA trade arrangement may have staff with multiple INTEGRITY accounts. Certifier users working with multiple organic programs can use the same USDA eAuthentication/Login.gov account but must create a new INTEGRITY account for each organic program.

Follow the steps below to register for an account. The Organic INTEGRITY Database user account registration is a 2-step process:

1)   Create a USDA eAuthentication customer account via Login.gov;
2)   Register for an INTEGRITY certifier user account.

1.3.1. USDA Customer account via Login.gov account

a)   Go to https://organic.ams.usda.gov/Integrity/

b)   Select the *USDA eAuthentication* link under the Certifier Employees section.

Note: if a user already has an existing USDA eAuthentication account, they can use their eAuthentication userID and password to register for INTEGRITY.
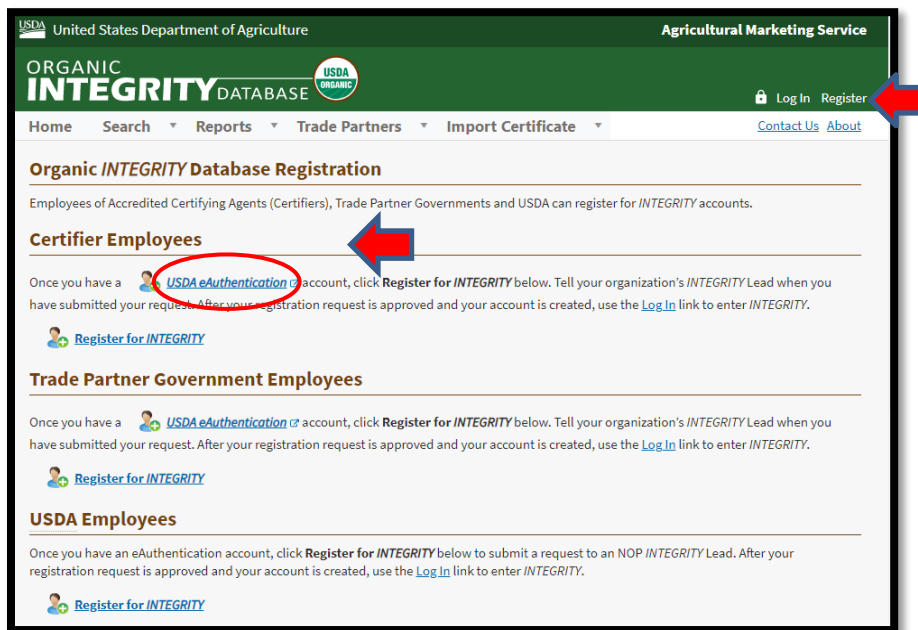
c)   Choose "Customer" account registration and follow the steps on the next screens to complete the Login.gov account setup. For additional information on creating a USDA customer account and Login.gov, go to the Public Customer Frequently Asked Questions (FAQs) at https://www.eauth.usda.gov/eauth/b/usda/faq.

1.3.2. Registration for INTEGRITY account

Users with a Login.gov/USDA eAuthentication account can proceed to *Register for INTEGRITY.*

a) Click the *Register for INTEGRITY* link in the Certifier Employees section.
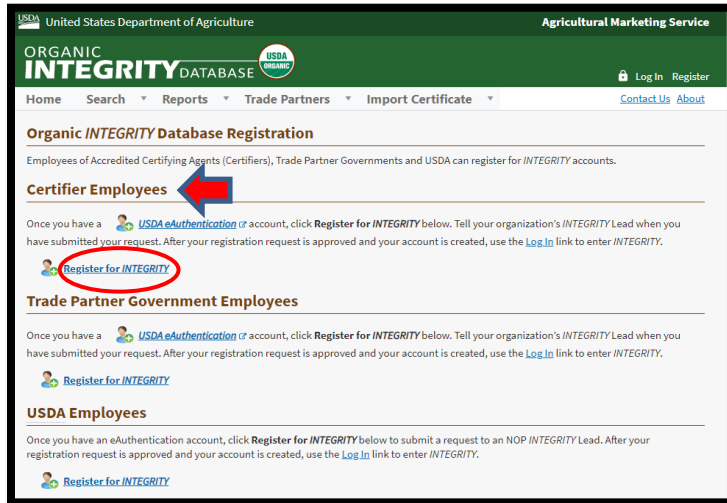
b) To login to INTEGRITY, enter eAuthentication User ID and Password or click the Login.gov button, depending on the USDA customer account you are using.

Click the Login.gov button if you recently created a USDA customer account via Login.gov.

Enter your eAuth User ID and Password, if you have an existing USDA Customer eAuthentication account (created prior to September 12, 2023).

c) Click the *Register for INTEGRITY* button to start the registration process.
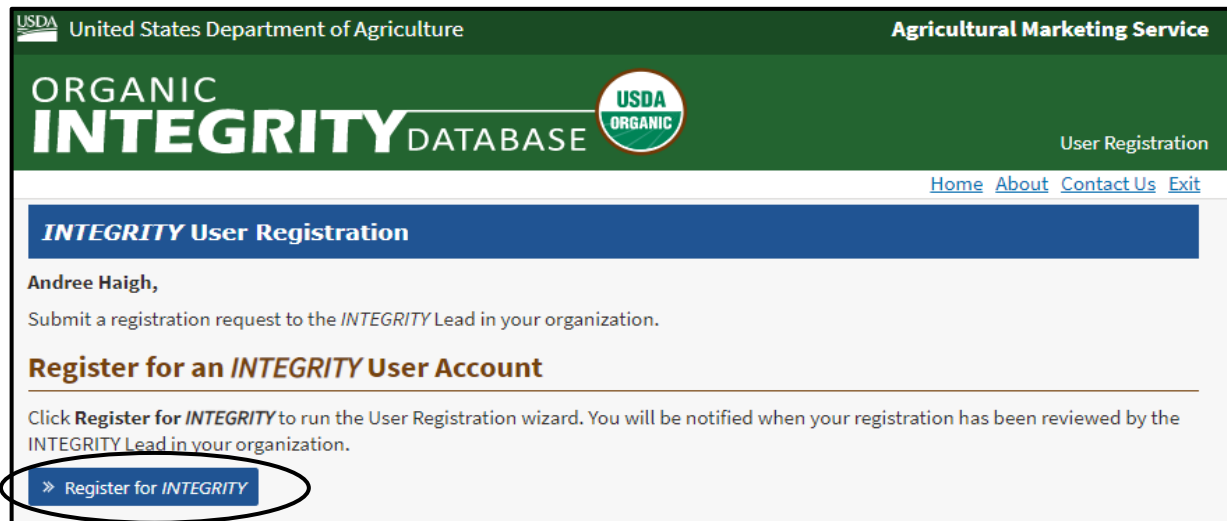
Figure 1: Registering for INTEGRITY

1. Step 1 in the wizard provides an overview; select **Next**.
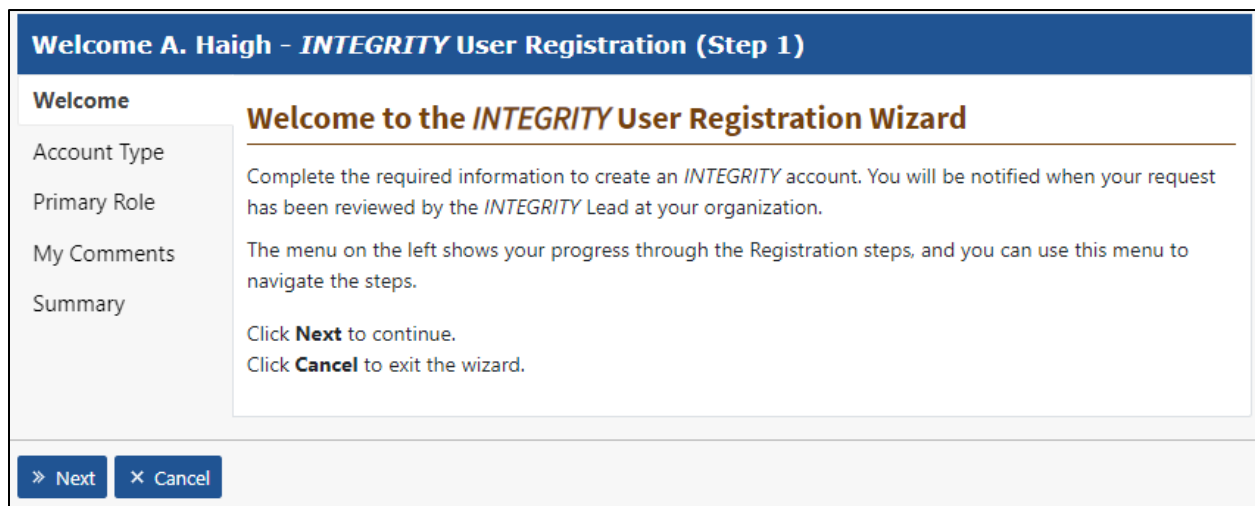
Figure 2: Registration Wizard, Step 1 - Welcome

2. Account Type: select **Certifier**

Figure 3: Registration Wizard, Step 1 – Account Type

3. Trade Partner Program: select the governing organic program that your organization is associated with Program from the dropdown;

Figure 4: Registration Wizard, Step 2 - Program

4. Find your **Organization** in the list and then click Select, then **Next** to move to the next step.

Figure 5: Registration Wizard, Step 2 – Organization

5. Role: Select either **Certifier – Staff, Certifier - Staff Read Only** or **Certifier – *INTEGRITY* Lead**; select **Next**.

Figure 6: Registration Wizard, Step 3 – Role

6. After this, an *optional* comments screen is presented; if you want to provide any other information that will be seen by Leads for your organization, enter it in the box. Then select **Next**.

7. A summary of your registration request will be displayed; review it for accuracy, make any changes, and select **Finish** to submit.

8. The last screen tells you that your request is being processed and contains a summary of the data you submitted. Select **Edit** if you need to change anything.

Figure 7: Registration Request Summary

After your registration request is submitted, an *INTEGRITY* Lead for your organization must approve it. Your *INTEGRITY* Lead will notify you when they have processed your registration request. Once your account has been approved, you will be ready to log in!

In your browser, go to https://organic.ams.usda.gov/Integrity/ and select Log In in the upper right corner. Enter your USDA Customer Login.gov account credentials (or an eAuth account, if applicable).

1.4. Register for an additional *INTEGRITY* user profile using the same USDA eAuthentication customer account.

A certifier organization may be accredited under multiple trade partner programs, e.g., USDA-NOP and CFIA-COR. Once a user creates the USDA Customer account, they can add additional INTEGRITY accounts to their user profile.

1. Go to the *INTEGRITY* site and select *Register*.

2. Login using your USDA Customer account.

3. Follow the registration steps described in the **Section 1.3.2**.

1.5. Switch between user profiles in *INTEGRITY.*

Certifiers can be registered with multiple organizations using one of the three roles: the Certifier – *INTEGRITY*, Certifier – Staff, or Certifier – Staff Read only roles. They can switch between their accounts by selecting on their **Account name** in the upper right corner to view a list of INTEGRITY user accounts. The check box indicates the account that the user is currently viewing.

- The **View Profile** link opens the User Profile page.

- The **Select Account** link switches the account view.
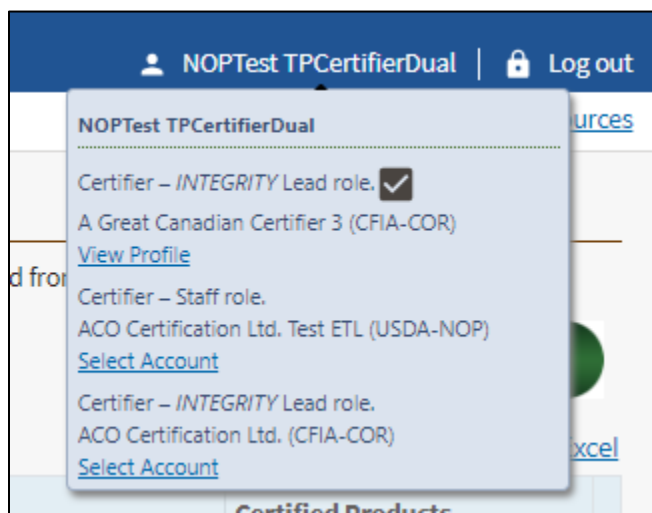
2. *INTEGRITY*: Public Pages

All users have access to the features on the public pages. You do not have to log in to use the features in this section, and these features are available whether you are logged in or not.

2.1. General Features

Contact Us page: If you have a question, comment, or suggestion, select the Contact Us link in the upper right corner of any page. Here you'll find a link to the Frequently Asked Questions (FAQ) and our email address (INTEGRITY@usda.gov).

Figure 5: Contact and About Links

About page: Select the About link to find general information and links to a glossary, taxonomic classification system, and release notes.

			Operation Details	
Arizona Valley Farming, LLC	[ASCO] Agricultural Services Certified Organic	ⓘ	**Contact Name:** Sean Edler **Address:** 36503 Carters Road, Salome, AZ 85348 United States of America	
Arizona Valley Farming, LLC	[ASCO] Agricultural Services Certified Organic	ⓘ◄	**Phone:**	
AvoPacific Oils, LLC	[ASCO] Agricultural Services Certified Organic	ⓘ	**Email:** **Web URL:** **Operation ID:** 9732967757	ia

Information Popups: anywhere you see a green "i" icon, let your mouse hover over it to view summary information.

Figure 6: Information Icon (i) and Popup Info Box

2.2. Home Tab

The Home tab of the web application contains basic filters that you can use to quickly narrow down the operation list. Using multiple filters generally narrows down the results more – results will match all the filters you have set.

2.2.1. Quick Search/Filter

Use the filters on the Home tab to narrow down the list of operations. Filter on multiple columns to continue narrowing down.

Certifier Filter

At the top of the list, select an organization from the *Certifier* dropdown list (Figure 9). When this filter is applied, the resulting list only includes operations that were issued an organic certificate by that Certifier.

Selection Lists: Status and **Country** fields

- To limit the list to a specific Status and/or Country, choose from the drop-down selection list.

Reset Search Filters

Operation	Certifier
	Select Certifier ▼

Figure 7: Certifier Filter and Reset

- You may select only one value at a time in each column.

- To reset, choose **All** from the selection list box(es) or select Reset beside the Certifier filter.

Text Filter Boxes

The other columns have a free-form text box for filtering. Enter the value you want to search for: for example, to find all operations in Utah, type **Utah** in the State/Province filter box, and press Enter.

- Filter boxes are *not* case-sensitive; UTAH and Utah will return the same results.

- Filters find partial words. For example, enter the filter value **black** in *Certified Products* to find operations that produce **Black** Beans, **Black**berries, Peas (**black**-eyed), and so on.

- For *Operation*, *City*, and *State/Province* you can only enter one word or phrase at a time. The system with search on the entire entry, not individual words.

- For *Certified Products*, if you enter multiple words separated by a space or comma, the system will search for any operation with at least one of the words in its product list. For example, enter **beans berries** to find operations that produce **beans** or **berries**, or **both**.

- To reset all filters, select Reset (located just above the table), or delete the value in a single filter box and press Enter to remove just one filter.

2.2.2. Export to Excel

In several places, you will see a link to **Export to Excel** (Home tab, Search tab (advanced search)). Select this link to export the list currently displayed. If you filter or execute any search first, only the filtered data/search results are exported.

Please note that if you export data from a search results page, it is a limited data set, and is NOT exported in the data submission template format. See section 3.1.2 for more information about uploading data to the system.

2.2.3. View Operation Info

Let your mouse hover on the green "i" icon next to an operation name; an information box opens. You can also select on the operation name to open its Operation Profile.

2.3. Search Tab: Advanced Search

To open advanced search features, select the **Search** tab or select the *Advanced Search* link on the Home page. The Advanced Search shows groups of filters on the left side of the page, and provides more options than the simple Home page filters.

> *PLEASE NOTE: when this page first opens, it shows a list of all published **Certified** operations. If you want to see other operations (such as Suspended, Revoked, etc.), you must select the appropriate Status checkbox(es) in Operation Status.*

For example, the advanced search allows you to search more fields than the simple filters, and in some cases, enter more than one value in a single search box.

2.3.1. The Search Pane

Use the pane on the left side of the Search window (shown in Figure 10) to apply one or more filters. Enter criteria, or select checkboxes, then select **Search**.

Each section in the search pane can be collapsed or expanded – select the small triangle icon to toggle the section display. Expanding or collapsing a search section does NOT modify the search results. In Figure 10, *Certificate Information*, *Operation Status,* and *Scopes and Products* are collapsed.

Figure 8: Search Criteria Pane

Some fields have **auto-complete**: as you begin typing, the application displays matching items. When you see the one you want, select to select it.

For example, type **north** in the State/Province field, and the system shows matching entries (Northern Mariana Islands, North Dakota, North Carolina, etc.).

See the Search Summary area at the top of the page to keep track of what filters are in place, even if sections in the search pane are collapsed.

In general, adding search terms in more than one field returns fewer results; results will match all search terms. However, in search boxes that allow multiple values (State/Province and Certified Products), search results only need to match one of the values.

Select **Reset** to return all search criteria back to their default settings.

Search Tips

- If the results don't include an operation you expected to see, check all criteria settings. They may be too limited.

- Too many results? Try adding search criteria in more fields to narrow down the list.

- Remember that the default search setting for Operation Status is for certified operations only.

- Send questions about how to use the Organic INTEGRITY Database, and/or any system errors to INTEGRITY@ams.usda.gov.

Table 1: Advanced Search Fields	
To Search By:	**Do This:**
Certifier	Choose an organization from the dropdown list. You may begin typing the name or abbreviation to see possible matches.
Operation Information	
Operation Name	Enter the name (or part of the name) you want to search for. This field accepts only a single operation name. The name may be more than one word, such as *Suzie's Farm*.
NOP Operation ID	Enter the **full 10 digit ID.** This field accepts only a single value; partial values are not accepted.
Certifier Client ID	Enter the **full client ID.** This field accepts only a single value; partial value are not accepted. These IDs are assigned by Certifiers and may contain numeric or alphanumeric values.
Contact Name	Enter a contact name; it is OK to enter just a last name. If you search for both first and last name, such as *James Smith*, names containing **either** name will be found, so the results will include James Smith, John Smith, John James, Smith Gordon, and so on.
Street Address	Enter a full or partial street address. For example, a search for *125 Main* would find 125 Main St and 125 Main Ave. A search for just *main* will find all street addresses containing 'main.'
City	Enter the city (or part of the city) you want to search for. This field accepts only a single city name. A city name can be more than one word, such as *San Diego*.

To Search By:	Do This:
State/Province	Enter one *or more* states or provinces in the box. For US States, begin typing the full state name or 2-letter US state abbreviation. Auto-complete suggestions are provided; when you see the one you want, select it from the list. For non-US locations, enter the full state or province name, **not** the abbreviation. For example, enter *Ontario* (not ONT) for Ontario Canada
ZIP/Postal Code	Enter the ZIP or Postal code (or part of the code) you want to search for. This field accepts only a single ZIP/Postal Code; spaces are acceptable, for example *LS18 5PU* is a valid postal code in the UK.
Country/Territory	Select the boxes to check the countries and territories to search for; select **Check All** at the top of the list to select all entries. If all items are checked, de-select the Check All entry and then select just the item(s) you want.
Certificate Information Certificate Number	Enter the **full number** of a Certificate number issued by a Certifier. These numbers can take many forms, and may include numbers, letters, dashes or other characters.
Operation Status Operation Certification Status	Select the boxes to check the values to search for; select **Check All** at the top of the list to select all entries. If all items are checked, de-select the Check All entry and then select just the item(s) you want.
Scopes and Products	
Scope	Select the boxes to check the values to search for; select **Check All** at the top of the list to select all entries. If all items are checked, de-select the Check All entry and then select just the item(s) you want.

To Search By:	Do This:
Scope Status	Scope Status works together with the Scope selection above. Select the boxes to check the Scope Status(es) to search for, within the Scope(s) selected above. If all items are checked, de-select the Check All entry and then select just the item(s) you want. In Scope Status, if **Check All** is selected, or **Not Certified/Specified** is selected, the resulting list will NOT be filtered by the Scope selected above.
Certified Products	Enter one *or more* products in the box. Separate product names by the Enter key. Operations that are certified for *at least one product* in the list will be displayed in the default results.

2.3.2. Search Summary

The Summary area at the top of the page shows what filters are currently applied. As you add or change search terms and execute the new searches, this area updates. It's a quick view of your filters, even if you have collapsed the search panes at the left side of the window.

Search Summary   💡 Search Tips

State/Province: OR   **Operation Status:** Certified
Scope: Crops, Handling, Livestock, Wild Crops   **Scope Status:** Certified, Surrendered, Suspended, Not Certified/Specified

Figure 9: Search Summary – Filters Applied

2.3.3. Clearing Searches

- **Text boxes:** delete the search term, and press Enter.

- **Checkboxes**: un-check the box(es) to remove them from the search; select **Check All** to include all values.

- **State/Province** and **Certified Products**: these fields allow multiple search terms; each term appears on a button with an X (see example below). Select the X to remove the search term.
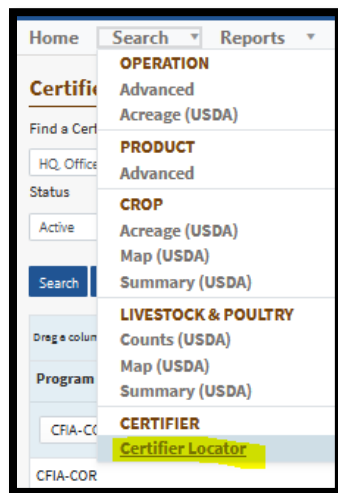
State/Province

[ID-Idaho ✕] [OR-Oregon ✕]   ✕

To *reset* ALL searches back to the default values, select the **Reset** button at the top or bottom of the search pane.

2.4. Search Tab: Certifier Locator

To open Certifier Locator, click the *Search* tab and then click *Certifier Locator*.

When this page first opens, it shows a list of all Certifiers under the Program the user profile is associated with. The user can filter by changing the Program filter to list certifiers for that program. They can further filter by available fields – such as *Find a Certifier with, Country, State, Province.*

2.5. Reports

On the Reports tab, you will find links for:

- **Certified Operation Counts** (by Certifier, Country, and State/Territory). These reports give the number of certified operations in these categories and are updated monthly. Select the link for any of these reports to download or view them in your web browser.

- **Data History** (export data to Excel). You can download a monthly 'snapshot' of all certified, surrendered, suspended, and revoked operations, or choose historical data from previous months or years. Data history includes operation level (name, location, status) and item level (products, crops, livestock) details.

2.6. Viewing Operation Profile Pages

Each Operation in the database has a profile page that provides more information. Select an Operation name on the *Home* or *Search* page to open its profile.

On the **Operation Details** tab of the profile (Figure 12), information includes NOP ID, Certifier ID, name and status data, the operation's scope(s) and items/products, and contact information.

Figure 10: Operation Profile – Operation Details

On the **Product Details** tab (Figure 13), you will find a list of products, organized by scope. Choose a Scope from the dropdown list to view products in one scope only; set scope to *Any* to view products for all scopes ('Any' is the default setting).

Figure 11: Operation Profile – Product Details

You can filter the Certified Product Information using the filter box at the top of the column. For example, enter an item name or partial name in the filter and press Enter to find matching entries.

The **Operation History** tab (Figure 14) includes the operation's status history and scope status history.

Figure 12: Operation Profile – Operation History

2.7. Trade Partners Tab

Click on the Trade Partners tab to select a Trade Partner organic program and operations certified to that program who may export organic product to the U.S.
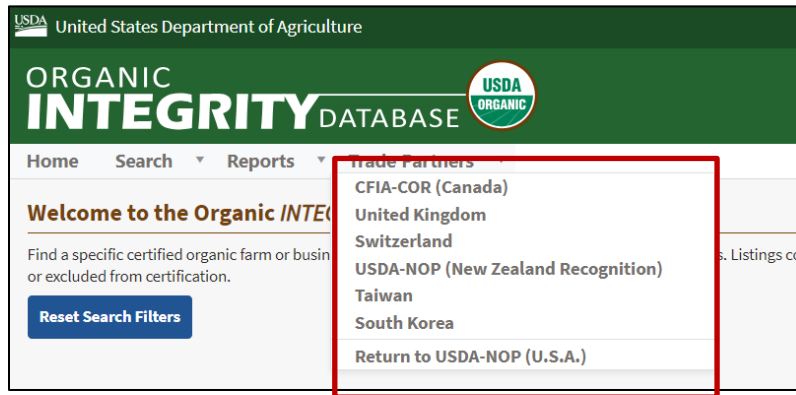
3. INTEGRITY: Certifier Operation Management

When you log in (use the Log In link in upper right corner of the page) you will enter the INTEGRITY Plus site. Notice near the top of the screen, there are additional tabs: **Operations** and **Administration**. All of the public functionality is still available here, but this provides access to features for Certifiers.

In addition to the Contact Us and About links a link to User Resources appears at the top of the screen when you are logged in.

User Resources page: Here you can find training presentations, templates for uploading data, tip sheets, Frequently Asked Questions for Certifier users, and other useful items.

Figure 13: Links to Information & Documents

Menus: All of the menus at the top of INTEGRITY screens are always available. A left-panel menu opens when you are viewing any operations page, such as My Operations. Some items on the left panel menu change depending on current status. For example, when you are viewing the locked Staging Area (meaning that a file is uploaded and ready for publishing, or operations are being edited using the web-based Operation Profile form), *Publish* appears as an action on the left panel.
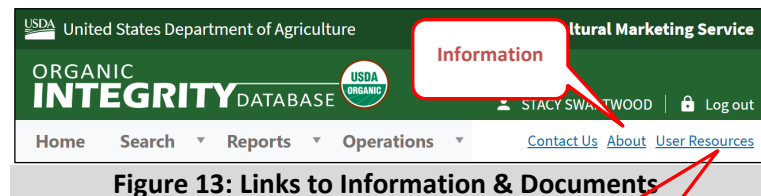
3.1. Upload Operation Data to INTEGRITY

Each Certifier can upload and modify data about the operations they certify as organic. The upload takes two general steps:

1. **Uploading** runs validation rules, and places the uploaded data in the *Staging Area*, a temporary holding place from which you can continue to make changes.

2. **Publishing** finalizes validated data in the database, making it available to the public.

To upload data, you must use the template provided through the web site (see the 'User Resources' link at the top of the screen). This is an Excel template that contains macros for data validation, indicates which fields are required, and shows the proper format for each field.

> **NOTE**: *The first tab in the template contains detailed instructions and notes for each field.*

3.1.1. Initial Upload to INTEGRITY

The **first** data upload from a certifier will create new operation records in the system and should include both Operation and Item (product) level data. Follow the instructions and tips in the *How to Upload a File* tip sheet.

Once the initial upload of data is completed, you can use the same Excel template to provide updates. On subsequent uploads, only **modified** data is changed in the database (not replacing all old data). You can also use Add Operation and Edit Operations actions to directly edit information in the database using the web-based form.

3.1.2. Preparing Information for Upload

1. Enter your operation and item data in the Template for Certified Operations Data Submission, following the instructions provided on the first tab in the template. **Your data should start on row 5** in the Operation Level and Item Level tabs in the spreadsheet, overwriting the sample data. There are several ways you can go about entering your information:

   a. Export existing data from INTEGRITY into the template (**Operations** > **Open Staging Area** > **Edit Operations**, then select Export to Excel).

      > It**'s important to export from the Staging Area**, *NOT from the search page. The data exported from the Staging Area is in the correct template format, and is the complete set of data for your organization.*

   b. Export data from your certifier system into the template.

   c. Download the template, as noted above, and enter data into it manually.

2. If you have exported data, make any necessary changes/additions to the data in the template.

3. Make sure all required fields are completed. See detailed instructions on the first tab in the template.

4. SAVE or SAVE AS an Excel workbook (.xlsm, .xlsx or .xls). The file must be under 12MB in size; if the file is too big, split it into two (or more) separate files and upload one at a time.

3.1.3. The Upload and Publish Process

General Notes on Uploads

- Only one file can be uploaded at a time.

- You must *Publish* or *Clean Up & Unlock* the staging area before another file can be uploaded; it automatically locks when you upload a file. Notice how the left panel menu changes to indicate locked/unlocked status of Staging Area. The options to *Publish* and *Clean Up & Unlock* appear only when the Staging Area is locked.

- The columns in the template can be re-arranged, but they ALL have to be present for the upload

to succeed.

- **Remember to PUBLISH after completing the file upload. Updates are not available in the database until you PUBLISH.**

To Upload and Publish

1. In the INTEGRITY application, go to *Operations* > *Open Staging Area* (or you can select **View My Operations**).

2. Select **Upload a File**. (In the Staging Area, this appears in the main section of the screen as well as on left panel.) The screen shown in Figure 16 opens.

Figure 14: Upload a File

3. Select the **Select** button; an Open File dialog opens; choose the .xlsm, .xlsx or .xls file you want to upload.

   The Upload page opens, with the filename you selected shown under the first step.

4. Specify Content. In this step, select the option that applies to your file: **Operation and Item** level, or **Operation** data only. If you select *Operations Only*, any Item (product) data that was previously published for the operations in the file will be retained unless the operation certification status is changed to Revoked. All scopes and items for Revoked operations are deleted. (The *Publish Immediately* option pushes data directly to the database, but ONLY if no errors are found.)

5. Select **Upload File**.

   The system runs validations and produces a report. If there are errors, the upload will fail, and you must fix the problems and attempt the upload again. Validations are based on required fields. There may also be warnings relating to data quality, but data can still be published with

warnings. INTEGRITY runs through validations on Operation level data first; when all Operation level errors are corrected, then it runs Item level validation. This means that it could take a couple of attempts, particularly on your first upload, to complete the process.

While the validations are running, you will see the screen shown in Figure 17:

The File is being processed (Staging Area)

INTEGRITY is processing the file. When you Publish information that has been uploaded to the Staging Area, it is made available to the public.

Test1 (Certifier)

Your file is being processed. Please wait, it might take a while depending on the size of the file...

Waiting for completion...

0%

✕ Cancel

Figure 15: Upload – Validations Running

When the uploaded file passes validations and there are no errors, the data is in the Staging Area. The Staging Area automatically locks when a file is uploaded. At this point, you can perform one of the following actions:

- Publish Operations.

- Validate Operations (re-run validation rules).

- Export to File. If you want to make revisions before publishing the uploaded file, export it here. This exports as a macro-enabled file (.xlsm), like the original template. Make your changes and save the file. You must Clean Up & Unlock, and then re-upload the revised file. This applies even if you named the edited file the same name as before; the first version is already in the Staging Area, so you must re-upload to replace it.

- Clean Up & Unlock to cancel this upload. This action removes the file from the staging area, and no changes are made to the database.

- Edit the uploaded operations using the web-based Operation Profile form.

Note: you can also get to the Staging Area from the Operations menu.

6. **Publish Operations**. This step finalizes the data in the uploaded file in the INTEGRITY database. You will be able to see the changes right away; use filters or the Search page to look for any operation you uploaded.

One final screen opens (Figure 18), giving you the opportunity to verify this action (or Cancel) before making data available to the public. If you're sure, select **Publish Operations**.

*IMPORTANT! Remember to **PUBLISH** to make your uploaded data available in the database, and viewable by other users in the web application.*
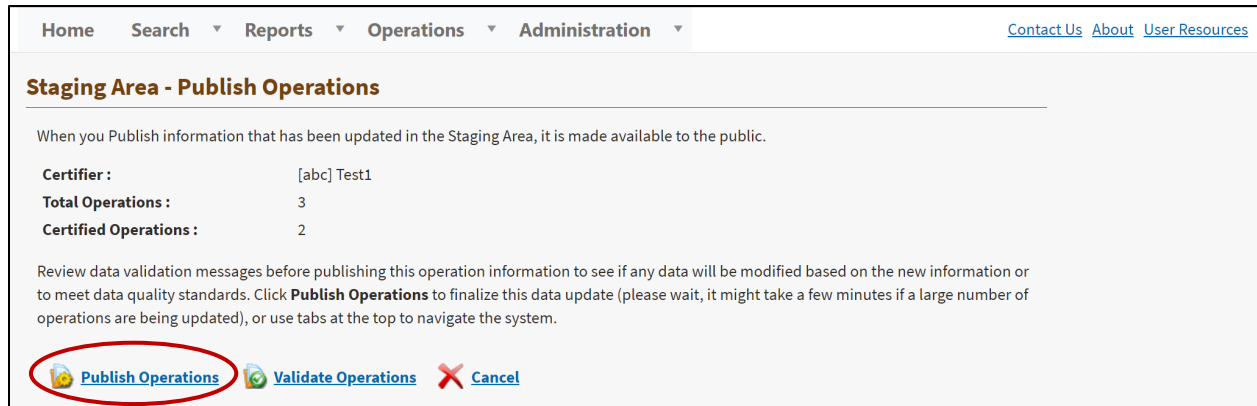
Figure 16: Staging Area – Publish Operations

Once data is published, the Staging Area is automatically cleared and unlocked. It is ready for the next upload or edit.

3.1.4. *Errors & Validation Messages*

If there are any errors in your uploaded file, error messages will display on the Staging Area page (which opens automatically), shown in Figure 19. Notice that the Staging Area is now *locked*, because a file has been uploaded. You must either fix the errors and attempt the upload again, or choose ***Clean Up & Unlock*** to remove the uploaded file.
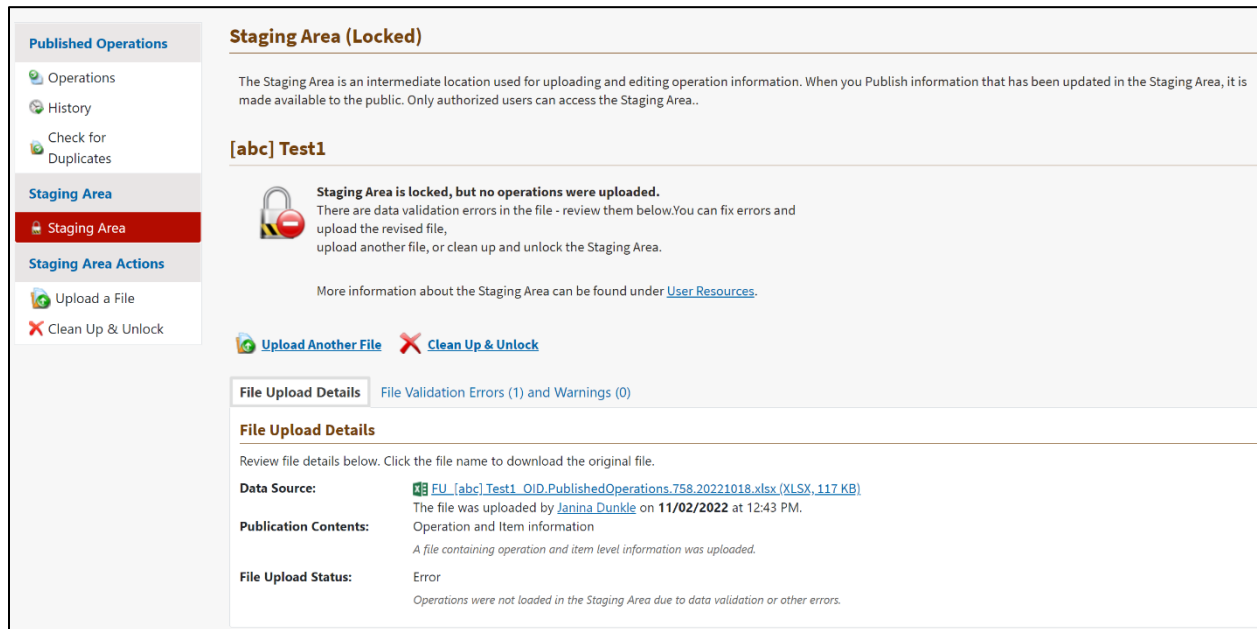
Figure 17: Uploaded File with Errors

Select the ***File Validation Messages*** tab to view details about the errors. This will tell you exactly where (by row and cell) the uploaded file has problems (Figure 20).

Figure 18: Error Detail for Uploaded File

To Make Corrections

1. Open the Excel file you just attempted to upload.

    OR choose Export to File to create a new Excel file containing the data you just attempted to upload. This exports as a macro-enabled file, like the original template.

2. Make the necessary changes and save the Excel file.

3. In the Staging Area, choose Upload a File, and repeat the upload of the revised file.

4. Select Publish Operations.

You may have to repeat the correction process more than once if new errors are found. Validations are run on Operation level data first. After that data is error free, then the Item level validations run. This means you may have to fix Operation data, and then on the next upload attempt, there may be additional errors found in Item level data. Keep editing and uploading until all errors are resolved.

In the example in Figure 21, there are no errors:

Figure 19: Validation Messages Tab in Staging Area

3.2. Edit Operations

In addition to uploading information from a file, you can use a web-based Operation Profile form to make changes to your published data, including adding new operations and items, and editing existing operations and items.

Editing involves two general parts:

1. **Edit** (add or update) operations and item level data. See detailed instructions throughout this section.

2. **Publish** to finalize data in the database, making it available to the public.

To edit operation and item level data, use one of these methods to get to the web-based form:

- On left-panel menu, select **Edit Operations**

- *Operations* menu > *Open Staging Area*, select the Edit Operations link.

Both of these options are available only if the Staging Area is unlocked (there cannot be an uploaded file awaiting publication). See Figure 22.
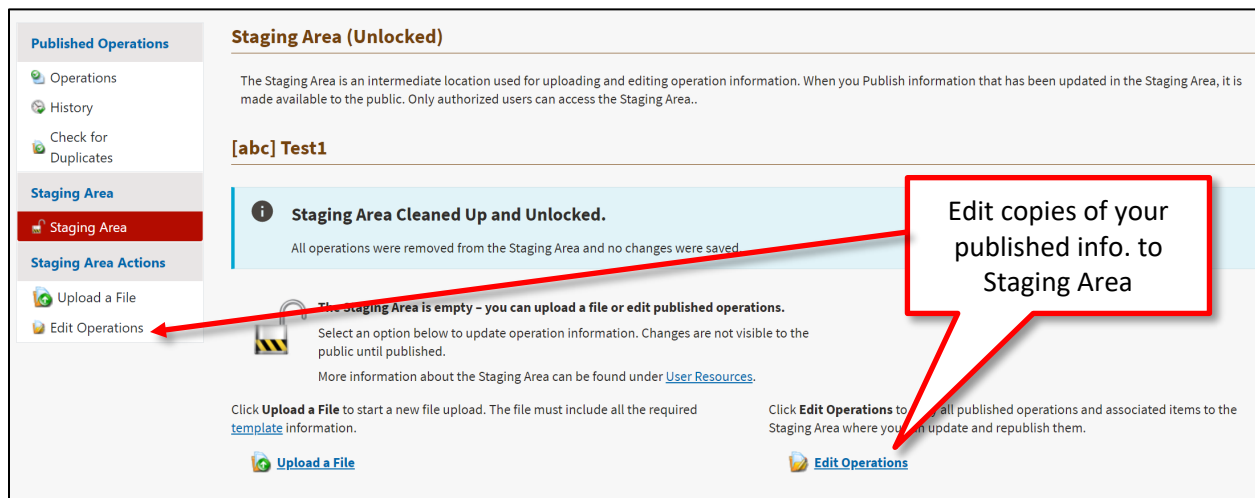
Figure 20: Edit Operations Links on Unlocked Staging Area Screen

- If you have already uploaded a file (but not published), the Staging Area is **locked** and the Edit option does not appear. Instead, select the Operations link in the left panel, under the heading *Staging Area* (see Figure 23).
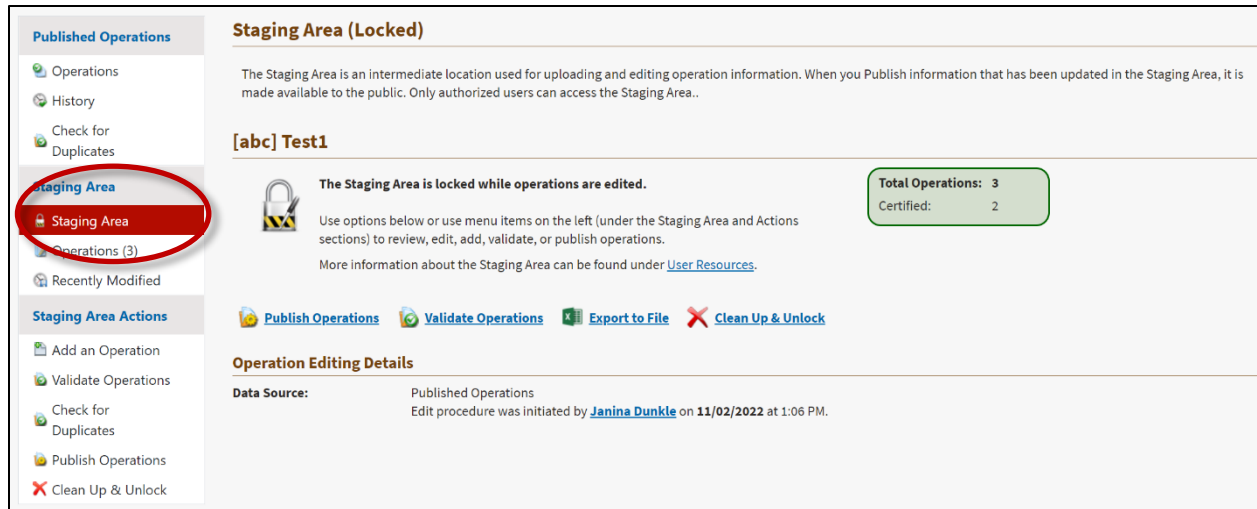
Figure 21: Edit Operations after Uploading a File (Staging Area Locked)

When you Edit Operations, the system actually copies ALL of your published operations and items to the Staging Area. **After making changes, you will Update (save) and Publish**, finalizing the changes in the database.

INTEGRITY shows a list of your published operations; there are options for *Open* and *Delete* on each row. Open an operation to view and change its information, including associated item (product) level information.

This list can be filtered using the filter box on the Operation Name column and/or the Status (choose from list). Refresh clears the filters and reloads data from the database. You can Add a new operation here – select the link just above the Operation Name column (also see Section 3.2.2).
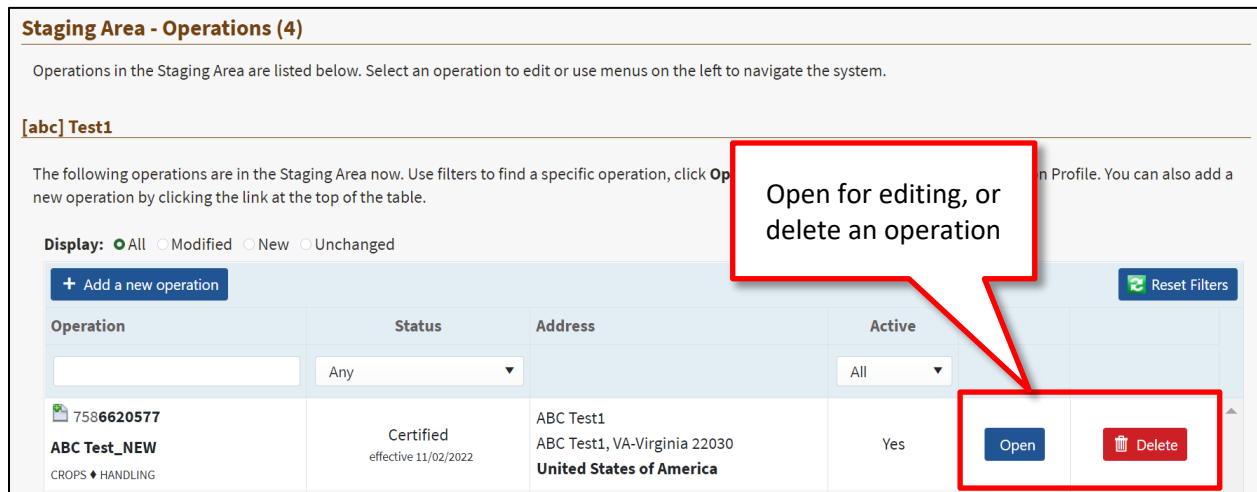
Figure 22: Operations in Staging Area for Editing

The small numbers next to each scope (CROPS, HANDLING, etc.) indicate the number of Items certified for that scope if they have been entered individually. The example in Figure 25 has two items for crops.
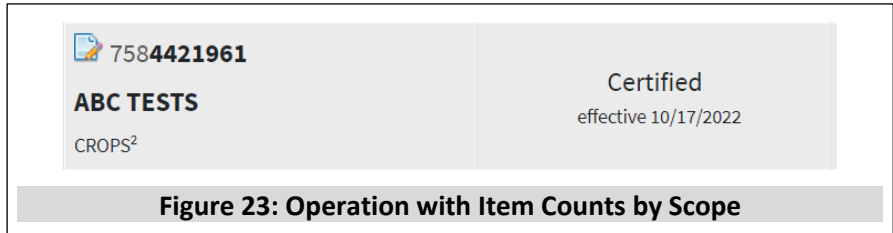
Figure 23: Operation with Item Counts by Scope

3.2.1. Edit an Existing Operation and its Items

Open an operation from the Staging Area (see instructions above). The Operation Profile opens, with information organized on two tabs, Operation Details (Figure 26) and Product Details (Figure 27).
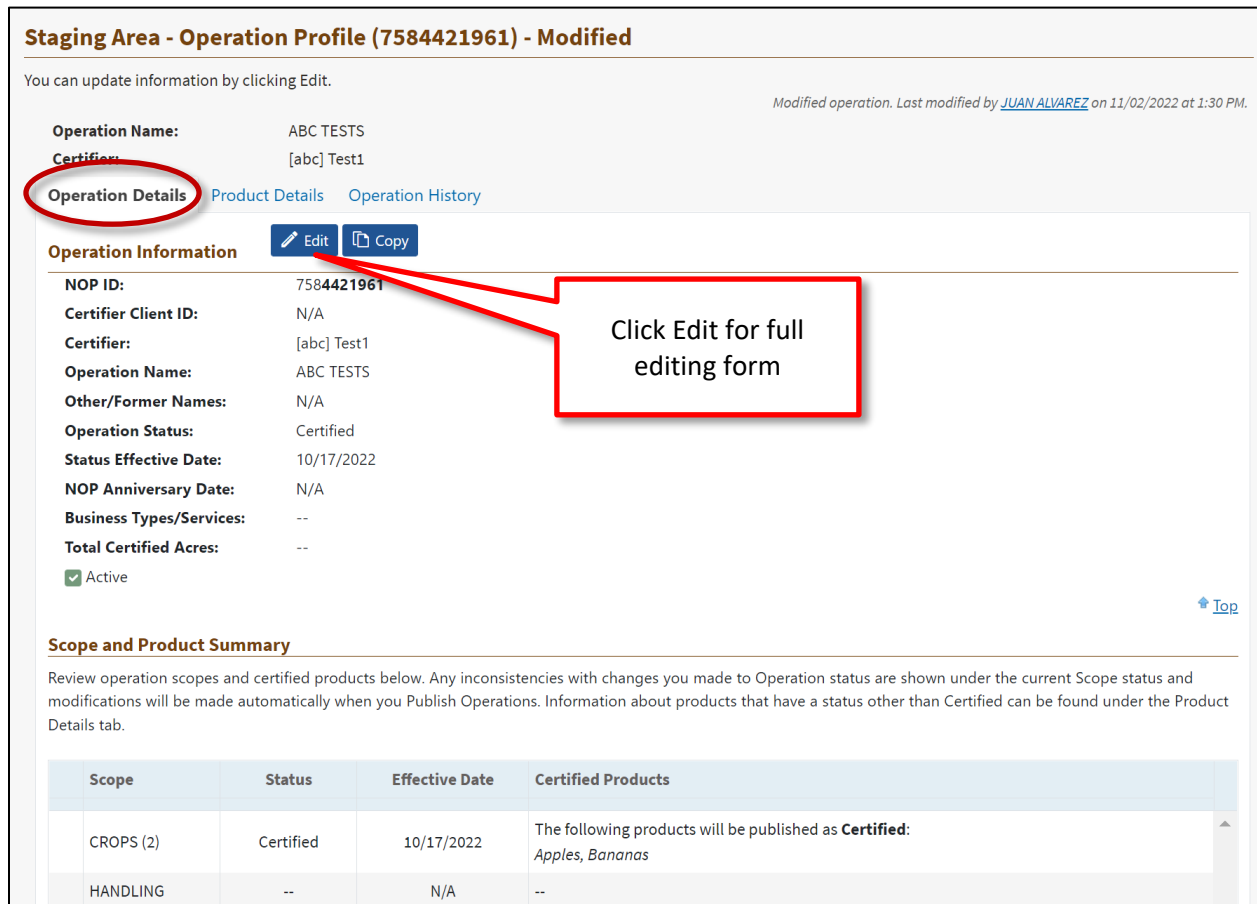
Figure 24: Edit an Operation – Operation Details Tab
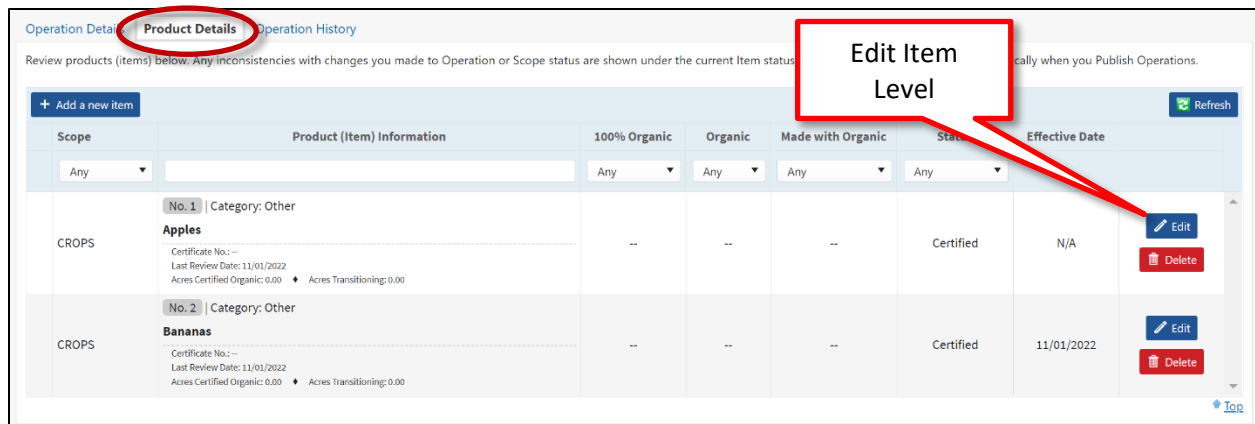
Figure 25: Edit an Operation – Product Details Tab

Editing Operation level data:

- Select the **Edit** link on a section in the Operation Details tab (see Figure 26). This method is quick if you have just a couple of minor changes. It opens just that section in an editing window. Make your changes and select Update to save; if successful, a message appears in a green block at the top of the screen.

Edit Operation (Using Editing Forms)

Open the editing form by selecting *Edit Operation* from the blue bar near the top of the Staging Area screen (see Figure 26 and Figure 27).

This set of buttons appears at the bottom of several editing pages:
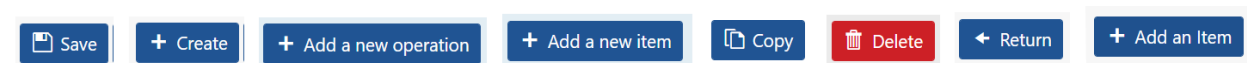
Figure 26: Editing Form Buttons

- **Save**: saves the current changes
- **Create**: shown only when you are adding a new operation or item; this saves the new data
- **Add a new operation**: opens a form for entering all operation level data (appears only when editing an operation)
- **Add a new Item**: opens a form for entering all item level data (appears only when editing an item)
- **Copy**: copies basic information from the current operation or product, and opens a form for additional data entry for a new operation or product
- **Delete**: deletes the currently displayed operation or item from the Staging Area. This function only works at the Operation Level for operations that have not been previously published – it will not delete operations from the database.
- **Return**: goes back to the operation profile in the Staging Area; if you have NOT selected Update, your changes are lost when you Return
- **Add an Item**: adds a new item to the operation you are editing; (appears only when editing an

operation)

Figure 27: Editing Form – Operation Level Information

General Instructions for Using Forms – Saving and Publishing

1. Make any desired changes in the form, in one or more sections.

2. When you are finished, select **Update** or **Create** at the bottom of the page (Figure 28) to save the changes.

3. Select **Return** to go back to the Operation Profile page.

4. When you have finished making updates and additions, select **Publish Operations** from the left-panel menu. Like publishing an uploaded file, INTEGRITY presents one last screen, Staging Area – Publish Operations (see Figure 18), in which you can run validation rules, cancel the updates, or continue with publishing. When you select Publish Operations here, the information is written to the database and made available to the public.

3.2.2. Add a New Operation

There are several ways to get to a New Operation form:

- From the Staging Area, select Edit Operations, then **+ Add a new Operation** just above the Operation Name column (see Figure 24)

- On an Operation Profile form in the Staging Area, **Add Another Operation** link in the blue bar at the top of the screen (Figure 26 and Figure 27)

- On an Operation Profile form in the Staging Area, select the **Add Operation** button (at the bottom of the screen, Figure 28)

- Copy an existing operation, and then edit the details if there is one that is similar to the operation you want to add (see next section)

Any of these methods opens a new Operation Profile form, similar to the one in Figure 30. Follow the instructions on the screen for each field.

When you are finished with Operation level information, you can continue adding operations or add items, using the buttons (Figure 28) at the bottom of the page. Then follow the steps for saving and publishing the data in the form.

Staging Area - Add a New Operation

Enter information, then click **Create.**

[Operation Information ♦ Scope Summary ♦ Contact Information]

Operation Information

Enter or verify operation information. All dates must be entered using Month/Day/Year format (e.g. 01/15/2015 or 1/15/2015).

Certifier: [abc] Test1

NOP ID: *

generate

Enter a unique 10-digit value (starting with 973) or enter g, generate or auto to generate the ID automatically.

Client Operation ID:
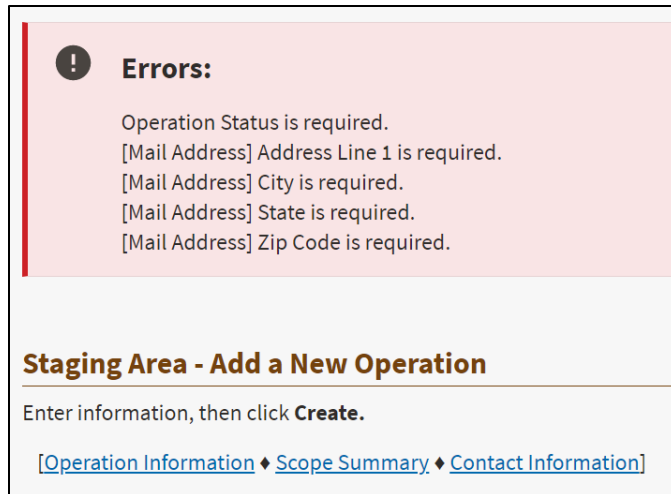
Client Operation ID is an operation identifier used by

Your organization name will autofill here

Your organization's 3-digit ID prefix appears here. 'Generate' assigns an ID automatically

Operation Name: *

Operation Other/Former Names:

DBA or Other names that the operation is doing or has done business as.

Operation Status: * --Select--   **Status Effective Date:** * MM/DD/YYYY

NOP Anniversary Date: MM/DD/YYYY

Business Types/Services: No business types/services selected

Total Certified Acres: Enter Total Acres

If provided, Total Certified Acres must be a positive number

Additional fields may appear, depending on what you select.

Additional Info:

Enter up to 4000 characters.

Figure 28: Add New Operation Form

If there are any errors on your form, such as missing data in required fields, INTEGRITY will display them at the top of the page (Figure 31). The new operation cannot be created until all errors are resolved.

> **Errors:**
>
> Operation Status is required.
> [Mail Address] Address Line 1 is required.
> [Mail Address] City is required.
> [Mail Address] State is required.
> [Mail Address] Zip Code is required.
>
> **Staging Area - Add a New Operation**
>
> Enter information, then click **Create.**
>
> [Operation Information ♦ Scope Summary ♦ Contact Information]

Figure 29: Add New Operation – Error Messages

A success message displays at the top of the screen when the Create action is completed, and the new operation is added to the data in the Staging Area.

3.2.3. Copy an Operation

When you are viewing an Operation Profile in the Staging Area, the Copy option is another way to create a new operation. Basic information, such as the contact name and address, is copied from the current one onto a new operation. Edit as needed and select Create. Then follow the steps for saving and publishing the data in the form.

3.2.4. Delete an Operation

The Delete option is only to remove an operation in the Staging Area that **has not been previously published**. In this case Delete prevents an operation from being pushed to the database, while still allowing all other operation data in the Staging Area to be published. You can find Delete in these locations:

- Staging Area > Edit Operations. Then Delete from the list of operations.

- Open the operation for editing (from the list in Staging Area, Figure 26), then choose Delete Operation at the top of the page

In either case, INTEGRITY presents a confirmation message noting that the operation will be removed from the Staging Area. When you Publish, the deleted operation is not sent to the database.

Please note that you cannot delete a published operation through the web application interface.

3.2.5. Add a New Item to an Operation

There are several ways to get to a New Item form:

- Open an operation for editing, select Add a New Item (at the top of the screen)
- When you have created a new operation, select Add an Item (button at the bottom of the

screen)

- Or Add Another new Item when you have already added one

The options presented on the New Item form (Figure 32) vary, depending on the Scope you choose for the added item.

Figure 30: Add a New Item Form

Select **Create** when you are finished; then follow the steps for saving and publishing the data in the form.

3.3. Publish Operations

Regardless of how you added or updated – uploading an Excel file or editing in the web-based forms – to finalize operations data available in the database, you must **Publish Operations**. Then you will see the updated data when you search in the web application.

If you see the Publish Operations link in the left panel or on the Staging Area page, it means there is data still in the Staging Area that has not been finalized in the database yet:
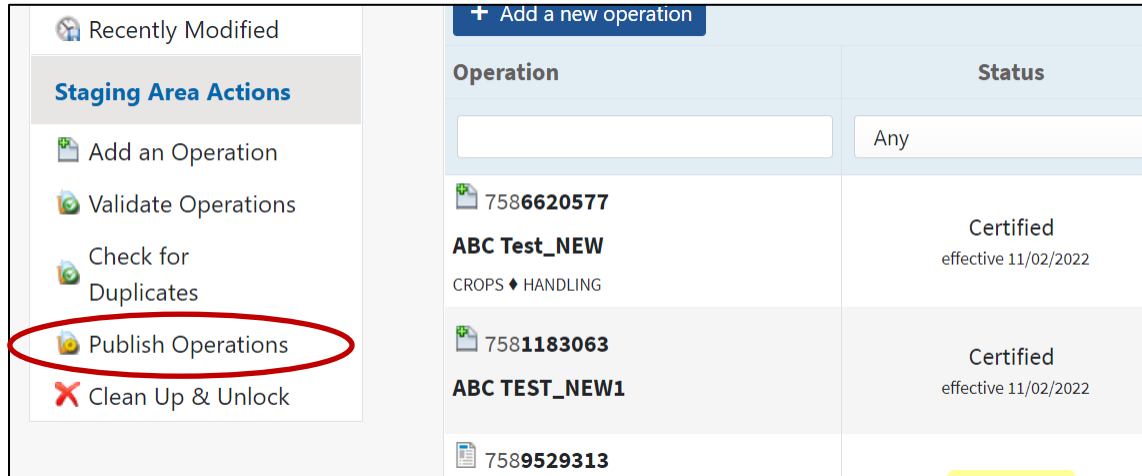
Figure 31: Don't Forget to Publish!

3.4. History for Published Operations

From the left panel menu, select the History link, OR **Operations** > **View My Data History**. The history tracks what changes were made by whom and when to your organization's published data as shown in Figure 34.

Figure 32: Certifier's Data History

In the Data Source column, 'Published Operations' means that edits or additions were made directly in INTEGRITY using the web-based Operation Profile form, rather than through a file upload. You can open any of the files of operations and items that were published on specific dates.

3.5. Export Operations to Excel

You can export a full list or filtered list of operations and their items to Excel – this gives you a properly formatted list that you can then edit, save, and re-import when you want to update operations data.

1. Go to **Operations > View My Operations** to display a list of your published operations.

2. Filter the list if you want only a subset of the operations.

3. Look for the Export to File link (Figure 35) at the top of the list. Select the link and then save the file to your computer. See Section 3.1 for how to upload if you'd like to edit or add operations.

Figure 33: Export List of Operations to Excel

4. INTEGRITY: Certifier Import Certificate Management

The Import Certificate tab can be found on the top navigational menu in *INTEGRITY*.

Certifiers will have "Open Staging Area" along with the "Search Import Certificates."

Note: USDA Staff – Read Only will not have the Import Certificate tab available to them in *INTEGRITY*.

Figure 34: Import Certificate Menu - Certifiers

4.1. Upload Import Certificate

Each Certifier can upload and modify data for new and edited import certificates. The upload process takes two general steps:

1. **Choose File** (will run file structure validations; you will be informed if it doesn't comply with the

rules so you can correct it).

2. **Upload and Publish** (will run data validation and inform you of any corrections needed to be made to your data. If there are no errors, the system will publish validated data in the database and make it available to logged-in users instantly).

To upload data, you must use the template provided through the website (see the 'User Resources' link at the top of the screen). This is an Excel template that contains macros for data validation, indicates which fields are required, and shows the proper format for each field.

NOTE: The first tab in the template contains detailed instructions and notes for each field.

4.1.1. Preparing Information for Upload

General Notes on Using the Template

- All non-greyed out columns on the template must be present and required fields completed for the upload to succeed. Columns can be rearranged into any order, but all must be present on the worksheet.
- There are greyed-out columns that should NOT be completed because they are used for data exports.
- There are hidden columns that should NOT be completed because they are reserved for future features.
- The columns in the template can be re-arranged, and all columns must be present even if they are greyed-out.
- The data type in the columns should NOT be changed (ex. from number value to text).
- Either Exporter or Final handler must belong to the certifier issuing the certificate.
- Start on Row 5 (delete any sample data).
- If you create a certificate with errors, change the End Date to today; it will be marked invalid overnight.

1. Enter your import certificate data in the Template for IC Data Submission, following the instructions provided on the first tab in the template. **Your data should start on Row 5** in the Import Certificate tab in the spreadsheet, overwriting the sample data. There are several ways you can go about entering your information:

    a. Export existing data from INTEGRITY into the template (**Import Certificate** > **Open Staging Area** > **Published Import Certificates**, then select Export to Excel).

It**'s important to export from the Published Import Certificates**, *NOT from the search page. The data exported from the Published Import Certificates is in the correct template format and is the complete set of data needed.*

    b. Export data from your certifier system into the template.

    c. Download the template, as mentioned above, and enter data into it manually.

2. If you have exported data, make any necessary changes to the data in the template.

3. Make sure all required fields are completed. See detailed instructions on the first tab in the template.

SAVE or SAVE AS an Excel workbook (.xlsm, .xlsx or .xls). The file must be under 12MB in size; if the file is too big, split it into two (or more) separate files and upload one at a time.

4.1.2. The Upload and Publish Process

General Notes on Uploads

- Only one file can be uploaded at a time.
- Valid templates will be published immediately.

To Upload and Publish

1. In the INTEGRITY application, go to *Import Certificate* > *Open Staging Area*.

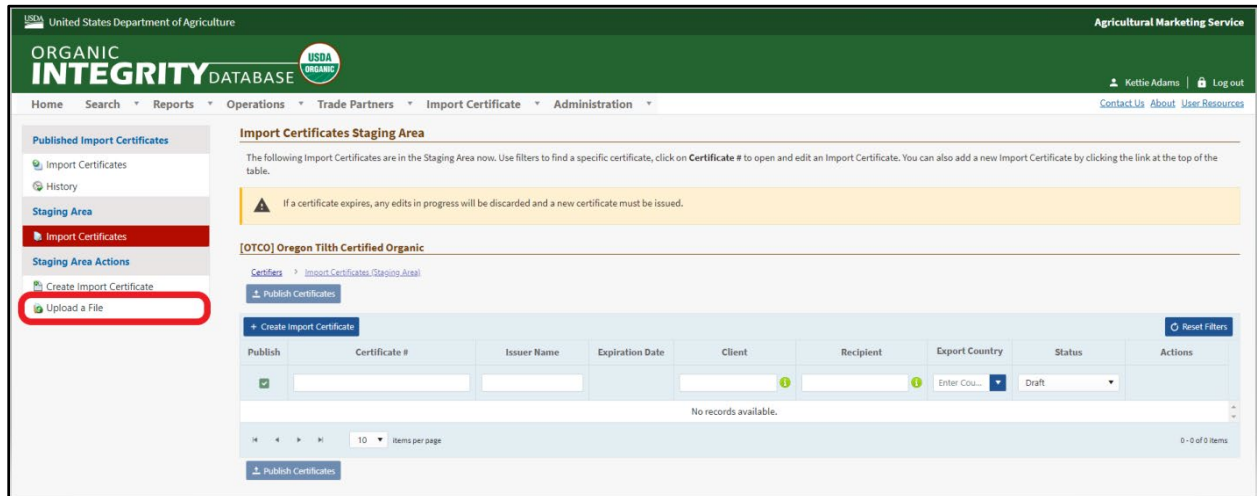2. Select **Upload a File**. (In the left navigation under the Staging Area Actions.)

Figure 35: Import Certificate Staging Area

3. Once you land on the Upload a file page, select the **Choose File** button, then an Open File dialog opens; choose the .xlsm, .xlsx or .xls file you want to upload.

4. The Upload a File page opens with the file name you selected shown under the first step.
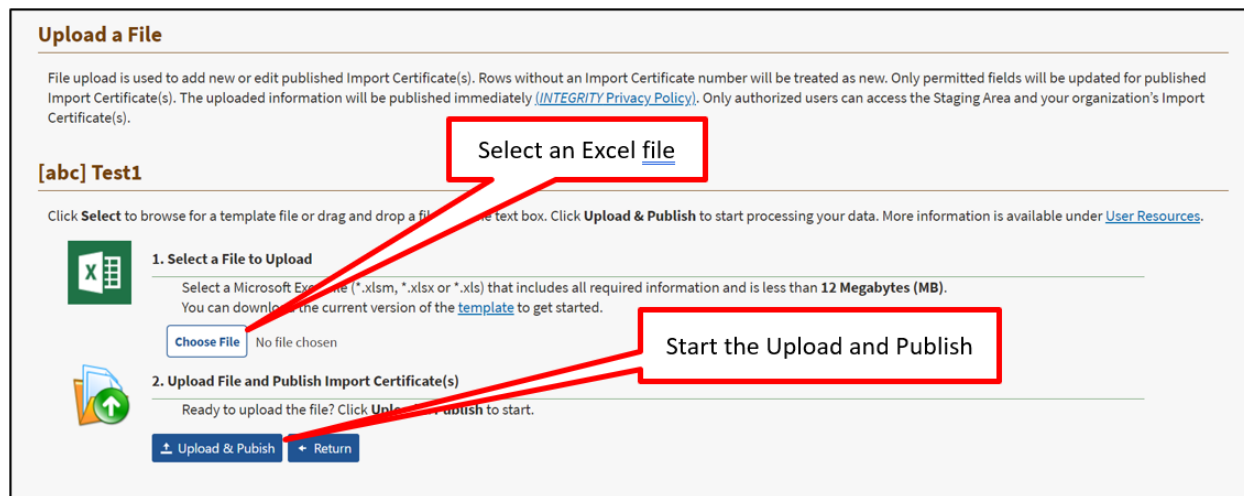
Figure 36: Upload a File - Import Certificate

5. Select **Upload & Publish**.

The system runs validations and produces a report. If there are errors, the upload will fail. You must fix the problems and attempt the upload again. Validations are based on required fields. There may also be warnings relating to data quality, but data can still be published with warnings.

While the validations are running, you will see the screen shown in Figure 38.

Figure 37: File Upload Status - Publishing

When the uploaded file passes validations with no errors, the data is automatically published and available in Published Import Certificate and Staging Area

4.1.3. Errors & Validation Messages

When there are errors in your uploaded file, the page will refresh and display the "File Upload Details" and "File Validation Errors" tabs below the Upload File section.
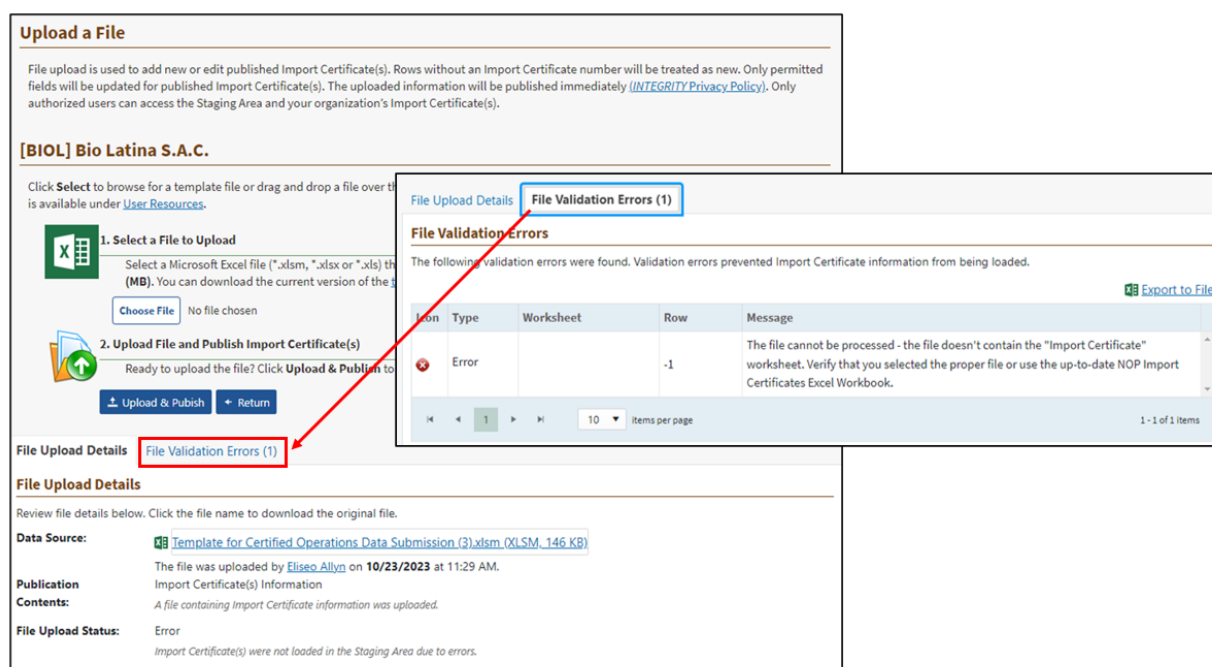
Figure 38: File Upload Details and File Validations Error Tabs

To complete the upload successfully, you must fix the errors and re-upload your file.

To view details about the errors, select 'File Validation Errors.' It will tell you exactly where (by row and cell) the uploaded file has problems.

To Make Corrections

1. Open the Excel file you just attempted to upload.

   OR choose Export to File to create a new Excel file containing the data you just attempted to upload. This exports as a macro-enabled file, like the original template, with a new tab listing

validation errors.

2. Make the necessary changes and save the Excel file.

3. Go back to the Upload a File page and choose the revised file for upload.

4. Then, select the **Upload & Publish** button.

You may have to repeat the correction process more than once if new errors are found.

In the example below, there are no errors:

Figure 39: Import Certificate Uploaded Successfully

4.2. Edit Import Certificate

4.2.1. Edit an Existing Import Certificate

Import Certificates can be edited to reflect new changes. The process is very simple and can be found below.

From the homepage, head to the Staging Area under the Import Certificate menu. Select an Import Certificate that you would like to edit from the options listed for you.

After you select the Import Certificate you would like to edit, you will be taken to the profile page where you can select the **Edit** button.

Figure 41 Import Certificate Profile Page

Edits in the certificate form are limited to the certificate End Date, Estimated Total Net Weight in KG, Estimated Total Number of Containers, Shipping Identification (including Lot Numbers), and Remarks. The changes will be automatically saved as you progress through the wizard tabs.

Once you have finished making your edits, select **Save**. If you want to preview the edits, select the **Preview PDF** button. *INTEGRITY* will download a preview of the Import Certificate in PDF format for you to review any new edits made.

The edited import certificate will only be in the staging area in draft status until published, so return to the staging area to republish your edited import certificate.

The import certificate number will remain the same and the newly edited Import Certificate will override the old one in both the staging area and the published import certificates page.

Figure 42 Editing an Import Certificate Completion

4.2.2. Create a New Import Certificate

There are several ways to get to a new Import Certificate form:
- From Staging Area, select **+ Create an Import Certificate** above the Publish name column.
- From Staging Area Actions, choose **Create Import Certificate.**
- Alternatively, open any Import Certificate and select **Copy**. (For more information refer to Section 4.2.3).

Figure 43 Create New Import Certificate

Any of the options you choose will lead you to a new Import Certificate form, see the example below.

For each section, you must enter the required fields to progress to the next step. If you need additional information about the field you need to fill in, select on the tooltip 🛈 icon.

1. The first section of the form is designated to **Entity Information** and covers exporter, final handler, and recipient information. Start your form by selecting a program, certificate start/ end dates, and country of export. Once completed, scroll down to the next section.

Figure 44 Create New Import Certificate – Entity Information

2. In **Exporter Information**, select your exporter type (Certified *or* Uncertified) using the radio buttons. If you selected a certified exporter, you have to enter an NOP ID and the system will automatically display operation's contact information on file.

   Note, you can look up an Operation ID by selecting on the Advanced Operations Search link. Once you find it, you can copy it, close out of the search window and return to your wizard to

continue with the form.

Figure 45 Entity Information – Exporter Information

3. If your exporter is uncertified, you must select the **Uncertified Exporter** option and fill in the required fields marked with red asterisk. Then, scroll down to continue.

Figure 46 Entity Information – Uncertified Exporter Information

4. In the **Final Handler** Information section, you must enter a certified final handler ID or, if the final handler is the same as exporter, check the box and the system will copy the information from the exporter section.

   Note, you can also provide Alternate Final Handler Contact Information, by checking the box and filling in required fields.

   Scroll down to continue.

Figure 47 Entity Information – Final Handler Information

5. Once on the **Recipient** section, select your Recipient type (Certified **or** Uncertified).
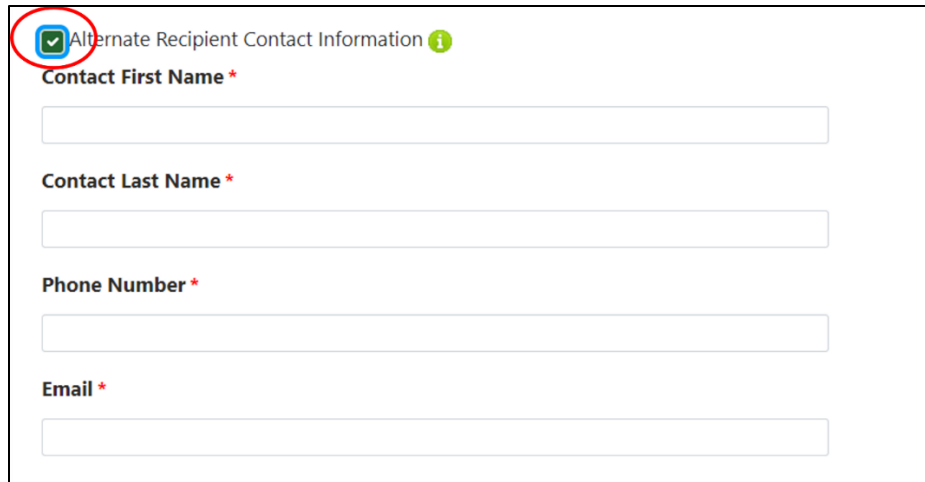

Figure 48 Entity Information - Recipient

Additionally, you can add the alternate recipient contact information by checking the box and entering the information.

Figure 49 Entity Information – Alternate Recipient Contact Information

Select Next, to move to the next section of the form.

Note, if there are any errors on your form, such as missing data in required fields, INTEGRITY will display them at the top of the page and also highlight the fields that need corrections. The new import cannot be created until all errors are resolved.

Note, if you satified all required fields, the system will automatically save your progress every time you select **Next** and display the success message.

6. In the **Product Information** section, enter required fields and select **Next** to move to the next screen.

   Note, the system doesn't support issuance of an import certificate for multiple products. You have to create a new import certificate for each product.

Figure 50 Product Information

7. The **Additional Information** section is the final step in the import certificate creation. Most of the fields will be filled out based on your prior selections. To complete the form, you must select your attestation from the dropdown and select **Save**.

Figure 51 Additional Information

Note, attestation applies to products certified under Trade Partner programs. If an Attestation does not apply (e.g., product is USDA-NOP certified), then choose N/A.

Congratulations – you've created a new *draft* import certificate!

A confirmation message displays at the top of the screen when the create action is completed, and the new import certificate is added to the data in the Staging Area.

Important, the important certificate will remain in *draft* status until published. You must return to Staging Area to publish it.

You will be able to preview and save your new import certificate by selecting on the **Preview PDF** button.

Figure 52 Example of a New Import Certificate

4.2.3. Copy an Import Certificate

When you are in the Staging Area, select any Import Certificate by clicking on the corresponding number. Then, you will be redirected to the Import Certificate profile page where the copy option will be available to you.
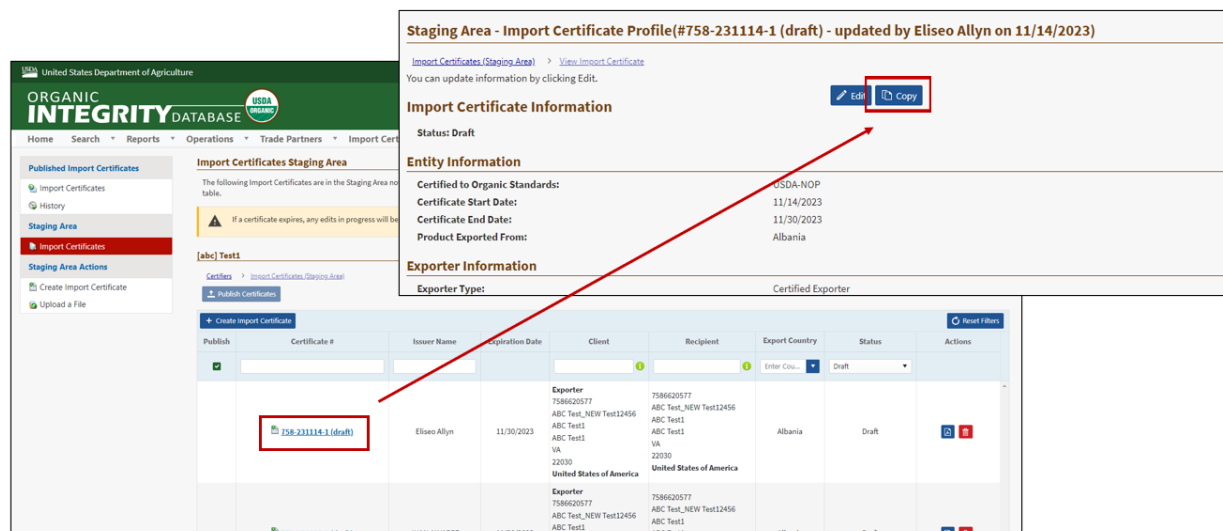
Figure 53 Copying an Import Certificate

After selecting **Copy**, the new Import Certificate is created with a new status and opened with the wizard for you to edit. You will be able to change any fields except for the "Date Signed" field, which will be blank and the "Certificate Issuer Full Name," which will be auto-populated to the user who created the copy.

4.2.4. Delete a Draft Import Certificate

Any draft Import Certificate can be deleted if no longer required in the Staging Area. You can identify that an Import Certificate is new by the icon to the left of the Certificate # (see figure below).

If the icon has a green plus icon, this means that the Import Certificate has been newly added (if you hover over the icon, it will say "The Import Certificate was added").

In the staging area, Status dropdown can help you filter for *draft* Import Certificates. Once you identify the one that needs to be deleted and select the **Delete** icon.

Figure 54 Deleting an Import Certificate

Once you have confirmed the Import Certificate should be deleted, the page should reload with a success message.
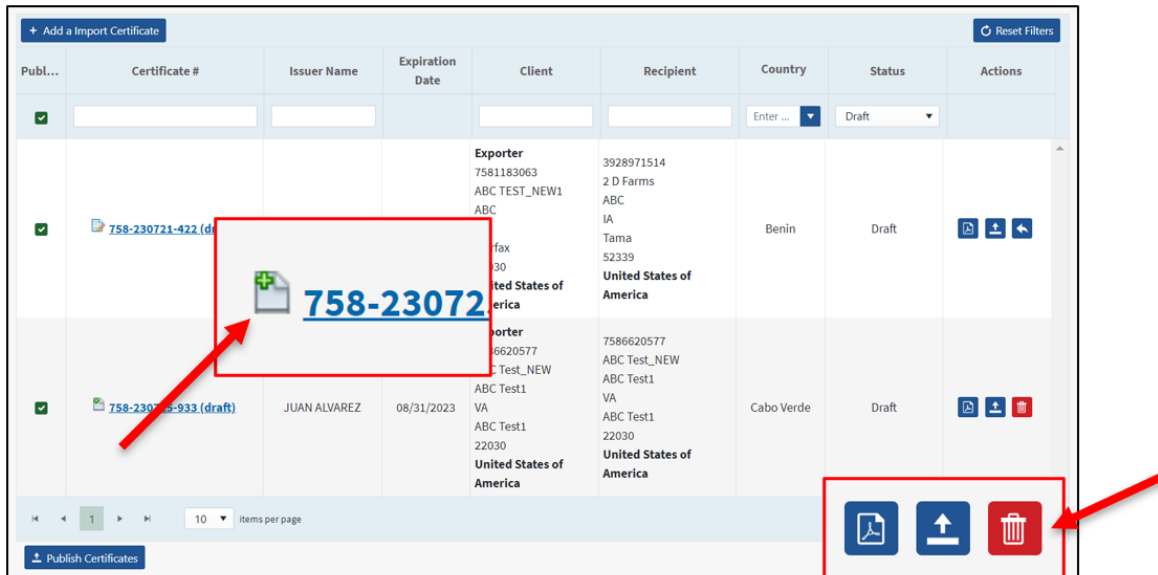
Note, published import certificates cannot be deleted hence the delete icon 🗑 will not be available in the Action column.

If you wish to restore an Import Certificate, select the restore icon ↰ on any entry (entries must both be valid and modified). Once you have confirmed the Import Certificate should be restored, the page should reload with a success message.

4.3. Publish Import Certificate

After you've published data, you can see a list of published new import certificates in the Published Import Certificates **left menu option**:
- Import Certificates: view new data in the system

Prior to publishing, you can review the newly uploaded import certificates data from the Staging Area left menu option:
- **Import Certificates (#):** you can preview import certificates by clicking on the PDF icon in the Action column.
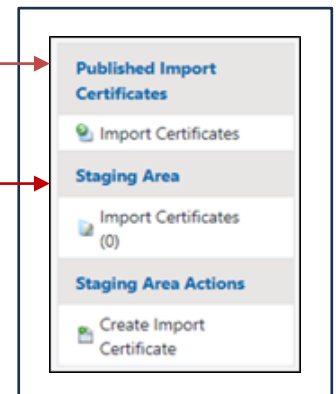
- Note, if you create a certificate with errors, change the End Date to today; it will be marked invalid overnight.

To publish your new and edited import certificate(s):

- Go to the Staging Area.

- The default settings will display All certificate statuses: Valid, Invalid and Drafts. To change it, simply select on the Status dropdown and select a relevant option (eg.Drafts). Use the

checkbox column to select all or individual certificates in draft status for publishing.

- Then, select the Publish button (Option 2) in the Actions column to complete the action.

- If you selected multiple certificates, you could use either the Publish button above or below the grid (Option 1 & 3) to proceed with the publishing process.

- Once you confirm your action by selecting OK.

- Success message will confirm the completion of the process.

See your newly published import certificate in the Published Import Certificate page and the Staging Area with Valid status.

5. Administration: Certifier INTEGRITY Leads

Certifier INTEGRITY Leads are the user account managers for each organization. INTEGRITY Leads can perform data and account management within their own organization.

5.1. Process Registration Requests (*Approve/Reject/Cancel*)

When a new user registers for a Certifier account, the request must be approved by an INTEGRITY Lead for the new account to become active. Each INTEGRITY Lead can view pending requests for accounts within their own organization only.

Go to **Administration** > **Registration Requests** (If Registration Requests does not appear on the menu, you are not an INTEGRITY Lead.)

All pending requests are displayed in a list (Figure 37).

Figure 55 List of Pending Registration Requests

Select **Process** in the far right column for the request you want to work on. This opens the request:

Figure 56 Registration Request

Role: As the INTEGRITY Lead, you may elect to give user account management privileges to another user, for example, to have a backup person to review registration requests. If you want to do this now, simply choose **Certifier INTEGRITY Lead** from the Role dropdown list.

Actions:

- **Approve**: accept the request and activate the account; the user will appear in the list of User Accounts (accessible from the Administration menu)

- **Reject**: deny the request; account is not created

- **Cancel**: removes the request without accepting or denying it

Select one of the action buttons to process the request appropriately. In all cases, the user receives an email notification from INTEGRITY regarding the action taken.

5.2. Modify User's Role or Status

At any time, you can change a user's role (giving or removing Administrator privileges), or change an account from Active to Inactive.

1. Go to **Administration > User Accounts**

2. Select **Open** in the far right column for the user profile you want to change.

    Please note that by default, the list displays only Active accounts. To see Inactive accounts, select the Inactive radio button just above the list (right side of the screen).

Figure 57 Certifier Accounts
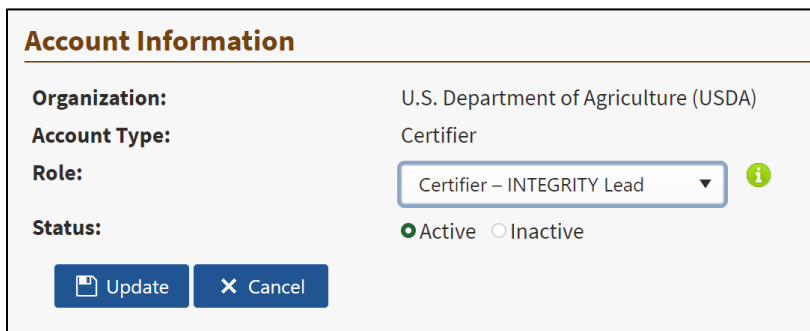
3. At the bottom of the user profile page, select **Edit**.

Name: **Allyn**, Xiomara
Email: ✉ xallyn.12890@test.gov

Account Information

Organization: U.S. Department of Agriculture (USDA)
Account Type: Certifier
Role: Certifier – Staff ⓘ
Status: Active

[🖉 Edit] [← Close]

Click to Edit this Profile

↑ **Return to top**

Figure 58 Edit a User's Profile

4. Change Role and/or Status, as needed.

Account Information

Organization: U.S. Department of Agriculture (USDA)
Account Type: Certifier
Role: [Certifier – INTEGRITY Lead ▼] ⓘ
Status: ◉ Active ○ Inactive

[💾 Update] [✕ Cancel]

Figure 59 Set Role and Status for a Certifier

5. Select **Update** to save the changes. The change takes effect the next time this user logs into INTEGRITY.

Appendix A.   User Roles

Role	View Certified Operations	View Surrendered Operations	View Suspended Operations	View Revoked Operations	Create/Edit Operations, including data submission template upload and publication	Create/Edit Certification Body Profiles	View Import Certificates	Create/Edit Import Certificates	Approve/ Manage Users
Public	X	X (< 3 years)	X	X (< 5 years)					
Trade Partner Government	X	X	X	X			Issued by Trade Partner CB		Trade Partner Staff and CBs
- Lead User	X	X	X	X	X	X	X	X	X
- Staff User	X	X	X	X			X		
Certification Body	X	X	X	X			Issued by CB	On Behalf of CB Client (Exporter or Final Handler)	CB Staff
- Lead User	X	X	X	X	X		X	X	X
- Staff User	X	X	X	X	X		X	X	
- Staff Read Only User	X	X	X	X			X		

Account Type	User Roles	Role Description
Trade Partner Government Staff	INTEGRITY Lead	Trade Partner Government INTEGRITY Lead users can view and edit all data submitted by their accredited certifying bodies. They also have user management rights for their government staff users and accredited certifying bodies, including approval of registration requests, changes to user roles, and changes to user status (active/inactive). All data and functionality available to the public and Trade Partner Government Staff Read Only users are also available to Trade Partner Government INTEGRITY Lead users.
	Staff (*read only*)	Trade Partner Government Staff Read Only users can view all data submitted by their government's accredited certifying bodies. All data and functionality available to the public is also available to registered Trade Partner Government Staff Read only users.
Trade Partner Certification Body	INTEGRITY Lead	Certification Body INTEGRITY Lead users manage registration requests and user accounts for their organization. All data and functionality available to the public and Certification Body Staff users is also available to Certification Body INTEGRITY Lead users.
	Staff	Certification Body Staff users can upload template files with operation and associated item information, add new operation records or edit existing records through the Operation Profile, and view operation history. All data and functionality available to the public is also available to registered Certification Body Staff users.
	Staff (*read only*)	Certification Body Staff Read Only users can view operation information and history and generate reports. All data and functionality available to the public is also available to registered Certification Body Staff Read Only users.
Certification Body with multiple OID accounts	INTEGRITY Lead	Certification Body INTEGRITY Lead users manage registration requests and user accounts for their organization. All data and functionality available to the public and Certification Body Staff users is also available to Certification Body INTEGRITY Lead users.
	Staff	Certification Body Staff users can upload template files with operation and associated item information, add new operation records or edit existing records through the Operation Profile, and view operation history. All data and functionality available to the public is also available to registered Certification Body Staff users.
	Staff (*read only*)	Certification Body Staff Read Only users can view operation information and history and generate reports. All data and functionality available to the public is also available to registered Certification Body Staff Read only users.

Appendix B.   Data Visibility

This table shows data visibility based on user role. All users can view Public data.

	Public	Certifiers	Reporting Certifier, USDA & Trade Partner Gov't
OPERATION LEVEL			
Operation ID	X	X	X
Operation Name	X	X	X
Other/Former Names	X	X	X
Client ID	X	X	X
Contact First Name	X	X	X
Contact Last Name	X	X	X
Operation Certification Status			
Certified, Surrendered, Suspended, and Revoked operations	X	X	X
All operations		X	X
Effective Date of Operation Status			
Dates for Certified, Surrendered, Suspended, and Revoked operations	X	X	X
Dates for all operations		X	X
Anniversary Date	X	X	X
Scope Certification Status (Crops, Livestock, Wild Crops, Handling)			
Certified, Surrendered, and Suspended scopes	X	X	X
All scope statuses		X	X
Effective Date of ScopeX Status			
Dates for Certified, Surrendered, and Suspended scopes	X	X	X
Dates for all scope statuses reported		X	X
Physical Address: Street 1	X	X	X
Street 2	X	X	X
City	X	X	X
State/Province	X	X	X
Country	X	X	X
ZIP/Postal Code	X	X	X
Mailing Address: Street 1	X	X	X
Street 2	X	X	X
City	X	X	X
State/Province	X	X	X
Country	X	X	X
ZIP/Postal Code	X	X	X
Phone	X	X	X
Email	X	X	X
Website URL	X	X	X
Additional Information	X	X	X
Total Certified Acres		X	X
Aggregate Data	X	X	X
Broker	X	X	X
Community Supported Agriculture (CSA)	X	X	X
Co-Packer	X	X	X

	Public	Certifiers	Reporting Certifier, USDA & Trade Partner Gov't
Dairy	X	X	X
Distributor	X	X	X
Marketer/Trader	X	X	X
Restaurant	X	X	X
Retail Food Establishment	X	X	X
Poultry	X	X	X
Private Labeler	X	X	X
Slaughterhouse	X	X	X
Storage	X	X	X
Grower Group	X	X	X
Grower Group Size			X
ITEM LEVEL			
Operation ID	X	X	X
Certificate Number	X	X	X
NOP Scope	X	X	X
NOP Category	X	X	X
NOP Category ID	X	X	X
NOP Item Name	X	X	X
NOP Item ID	X	X	X
Other Item	X	X	X
Item Varieties	X	X	X
Certification Status			
Certified, Surrendered, and Suspended items	X	X	X
All items		X	X
Status Effective Date	X	X	X
Last Review Date	X	X	X
Acres Certified Organic		X	X
Heads Certified Organic		X	X
100% Organic	X	X	X
Organic	X	X	X
Made with Organic	X	X	X