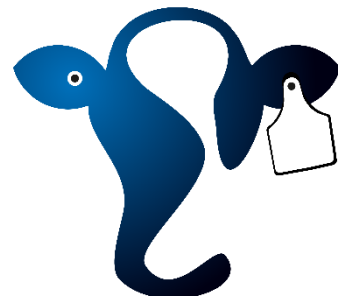




DairyTrace Mobile - User Guide

Free application for making declarations available on Apple Store & Google Play

Version 3 / 2023



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1 Contents of the User Guide

This user guide explains the different functions of the *DairyTrace Mobile*. The data event reporting application is compatible with cell phones **using iOS** (version 13+) **and Android-type** (version 9 with IT support or version 5 without IT support).

The DairyTrace Mobile app was designed by Lactanet to provide an additional means for producers to make their traceability declarations.

Tips are available throughout the guide to help make it easy for you to use the DairyTrace Mobile app. We strongly suggest that you refer to it as needed.

For technical assistance, please contact a Customer Service agent:

Support for Provinces

Outside of Quebec

Toll-free: 1 866 558-7223

(1 866 55-TRACE)

Email: info@DairyTrace.ca

DairyTrace

660 Speedvale Avenue West, Suite 101

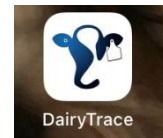
Guelph, Ontario, N1K 1E5

info@DairyTrace.ca

www.DairyTrace.ca

DairyTrace Mobile App is only available to users outside of the province of Quebec. Quebec producers should refer to the SimpliTRACE Mobile App User's Guide.

2 Prerequisites for using *DairyTrace Mobile*



To use *DairyTrace Mobile*, you must download the application onto your mobile device beforehand.

- Android Users: Search for the DairyTrace Mobile App by Lactanet in Google Play.
- iOS/iPhone users: Search for the DairyTrace Mobile App by Lactanet in the App Store.

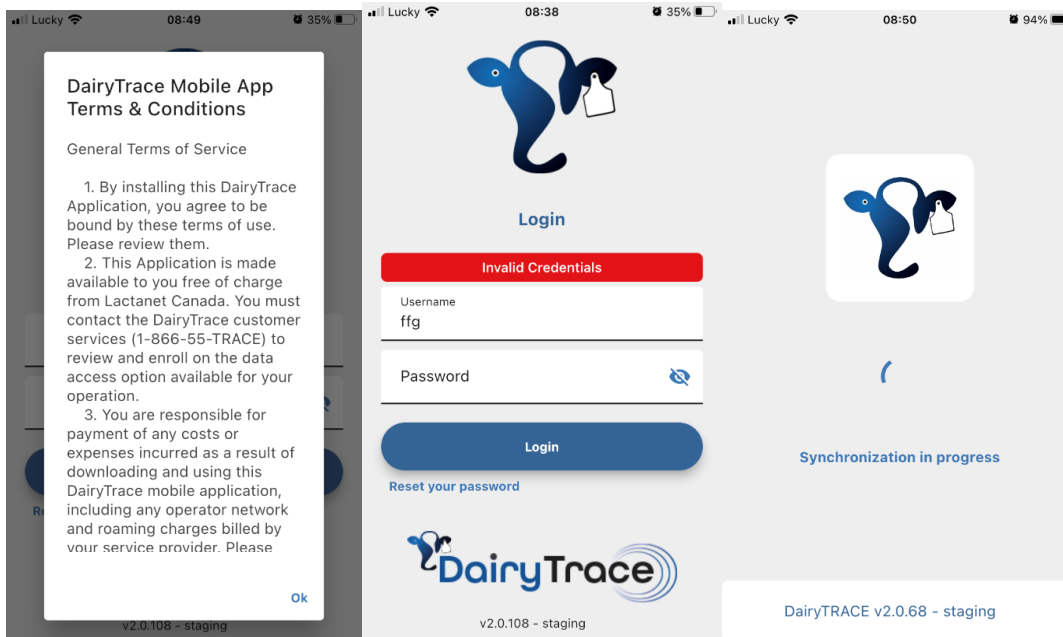
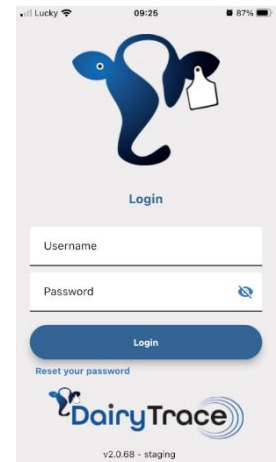
If you would like to use your tag reader with the *DairyTrace Mobile app*, please refer to the *Reader Connection Guide for Mobile Phones (section 6)* and follow the itemized procedures.

When you first log into **DairyTrace Mobile**, you will need to enter the username and password which you chose when you created your **DairyTrace** account.

Information fields in the form:

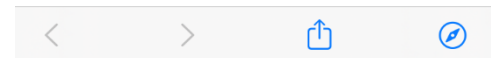
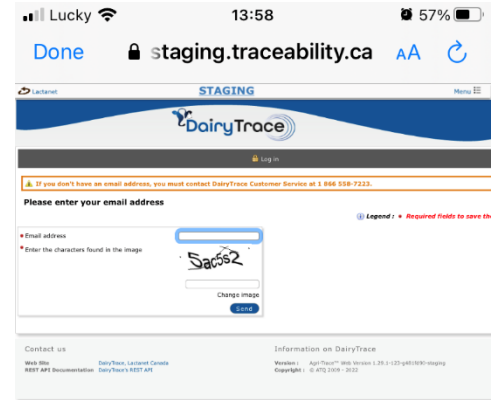
- ✦ **Username:** Enter the username for your **DairyTrace** account
- ✦ **Password:** Enter your **DairyTrace** account password
- ✦ **Click on the following button:** Login

*You will also have to accept the terms and conditions that appear when you first set up the app and occasionally after it has been in use.



2.1 Forget Password

- If you forget your password, on the login screen click **“Reset your password.”** This opens to our website (if connected to the internet) and then follow the steps to reset your password through your online portal.
 - Enter the email address linked to your user account creation.
 - Enter the characters on the screen and click **“Send”**.
 - Check your email for a password reactivation email from a Mail Monitor Account.
 - Click the link in the email received.
 - In the settings page of your portal account, on the Right side of the screen, enter in a new password (min: 1 uppercase, 1 lowercase, 1 number).
 - Re-enter the new password in Confirm Password.
 - Click **“Save”**.
 - Go to the welcome page and verify that you are using the correct username (appears on your portal Welcome page).
 - Go back to the app and try to log in with the new password.



3 DairyTrace Mobile Homepage

The home page of *DairyTrace Mobile* is composed of quick access to various features through 2 Menus. These features give access to specific menus for the application.

3.1 Main screen blue button options

+ **Create an event**

○ **Synchronize data with server**

Synchronization is done automatically when you make your reports. However, you can manually sync your account at any time to ensure that all data is up to date on the app.

☰ **View sent events**

Allows you to view all the declarations you have made using the *DairyTrace Mobile app on this device*. You can only view events in this screen. All editing must be done through the portal.

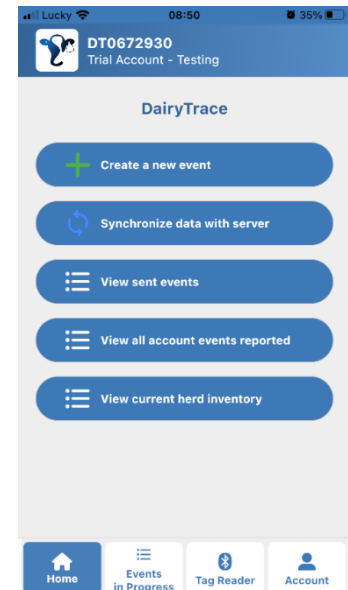
***Helpful Hint:** If you are unsure on what was the last event report you completed on the App, the most recent events will be at the top of the list.

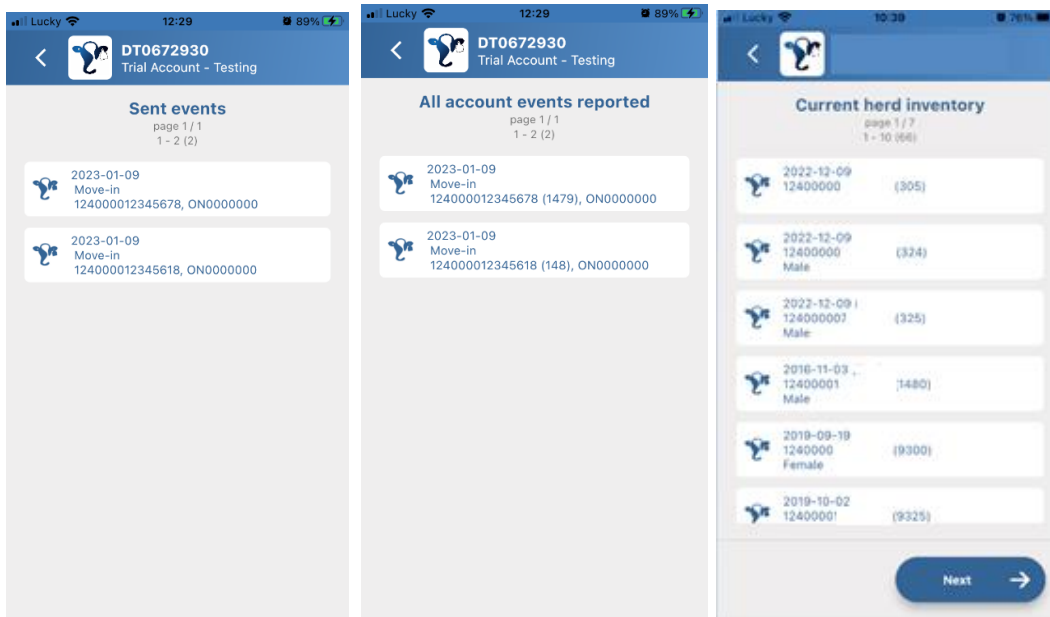
☰ **View all account events reported**

Allows you to view all the declarations you have made on your account from all sources. You can only view edits in this screen. All editing must be done through the portal.

☰ **View current herd inventory**

Allows you to view all animal currently on your Premises. You can only view edits in this screen. All editing must be done through the portal. **If it is a large herd, it may be too much for the app to download and could lead to crashing the app.*





3.2 Main menu options along the bottom



Home

Allows you to quickly return to the home page of the application.

Events in progress

This option shows a list of all the events entered but have not yet been submitted due to connectivity issues or errors.

Tag Reader

If you have a Bluetooth tag reader, you can connect your reader after reading the tag numbers for the events that you have to report on. This section will allow you to link your Bluetooth and upload sessions from the reader. See Section 6 for more details.

Account



This option allows you to change the active stakeholder, if you have more than one stakeholder number, change from day to night mode, change language, update clear memory, to see the version of the application, and more.

4 Creating an event using *DairyTrace Mobile*

Events in Progress reporting menu

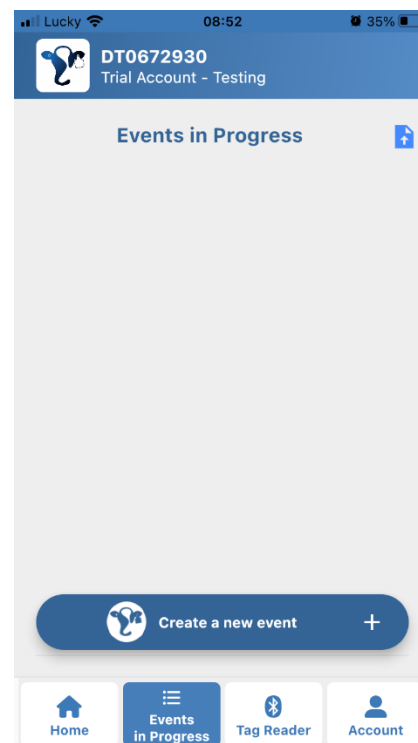
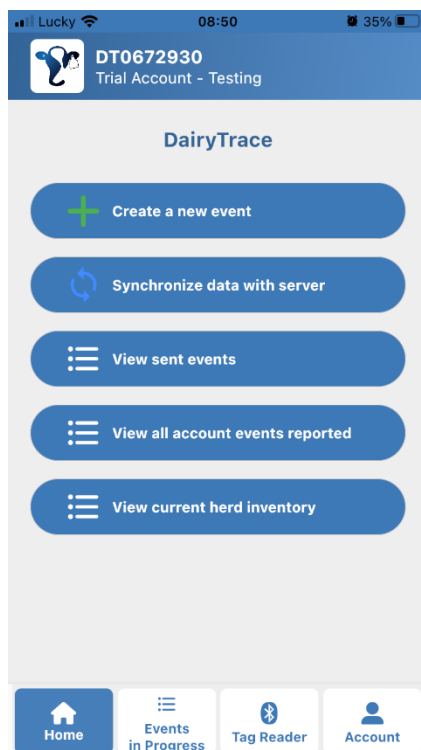
If the screen is blank there are no events waiting to be submitted.

Events that were completed while offline will be sent to the server automatically in the below situations:

- when reopening the app.
- when clicking the sync button on the home page 
- when clicking the **“Events in progress”** tab button
- when clicking the upload button (the small blue button on the Events in Progress page) 

When you want to report an event:

- From the Home page Click **“Create a new Event”**.
- From the **“Events in Progress page”** just click on **“Create a new event”**.



Choose the event type for the event report.

Types of events to choose from:

Tagging:

- Tag Activation/Birth
- Tag Reissued
- Cross Reference
- Replacement

Animal Movement:

- Move in
- Import
- Move-out

Tag Retirement:

- On-farm disposal
- Export



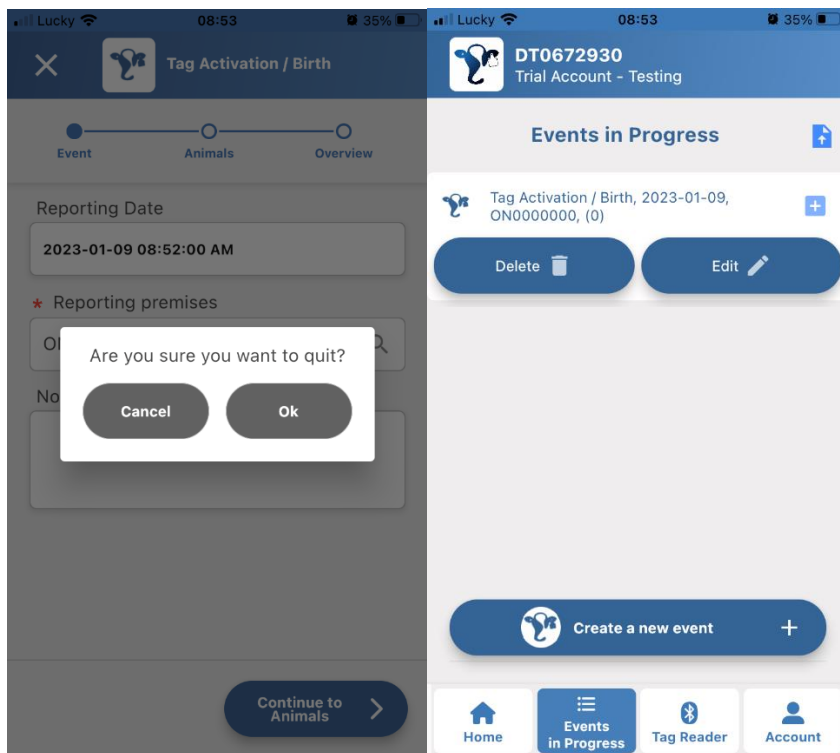
When creating a new event, many of the screens are similar for different event types, depending on their requirement criteria. Therefore, this user guide separates the sections of event reporting into 3 sections:

- **Event**
- **Animals**
- **Overview**

4.1 “Event” Section

If at anytime you wish to leave the event report, you started you can click the **X** on the top left hand.

If you wish to leave this event, click “**Ok**”. The event will be saved in the “events in progress” screen until you edit or delete it (or until the memory clears as per specific settings).



First page of creating an event once chosen the event types of:

4.1.1 Tag Activation / Birth, Cross Reference, Tag Reissued, Tag Replacement

Reporting Date:

This is automatically populated to the current date and time and cannot be modified.

Reporting Premises:

If you have more than 1 Premise linked to your account, click on the magnifying class to indicate which of your premises the animal is housed in. Select the desired premise.

Notes:

Optional information you might want to add that will be linked to the animal event.

4.1.2 Move-in

Reporting Date:

This is automatically populated to the current date and time and cannot be modified.

Premises of Arrival:

If you have more than 1 Premise linked to your account, click on “Premises magnifying glass icon” to indicate which of your premises the animal is housed in. Select the desired premise.

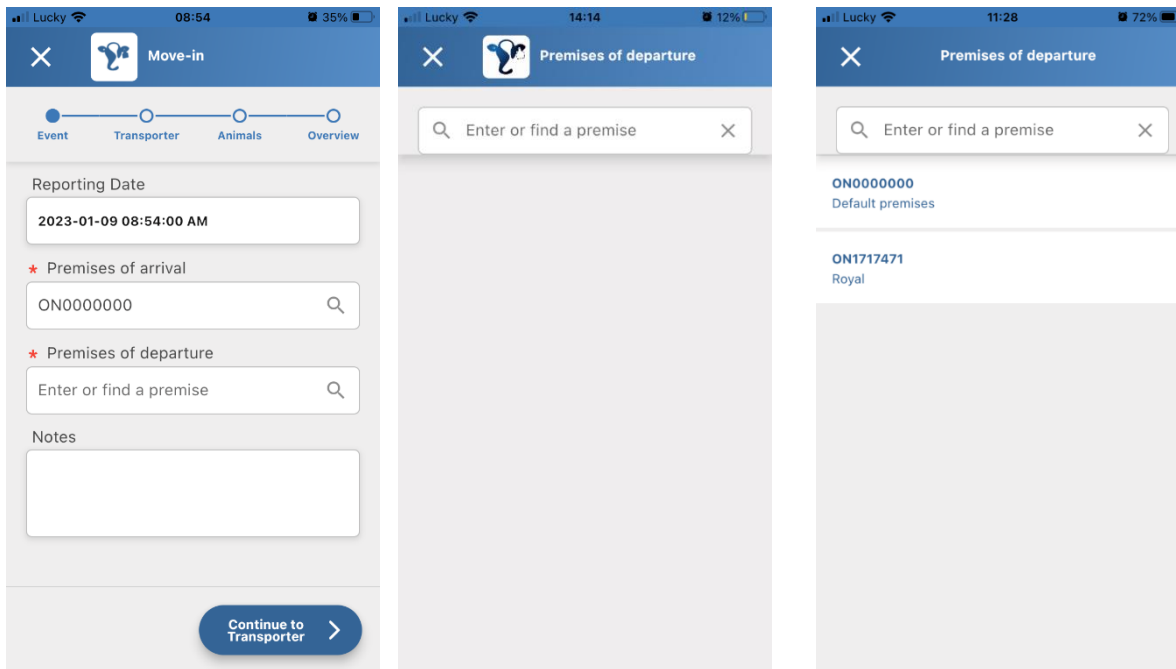
Premises of Departure:

Indicate the animal’s originating location by entering a valid origin premises number.

- If you have added Premises to your Address book in the portal, you can click the “Premises magnifying glass icon” and choose from the list of those premises.

Notes:

Optional information you might want to add that will be linked to the animal event.



4.1.2.1 2nd Page – Transporter (only appears for movement events)

Transporter Name:

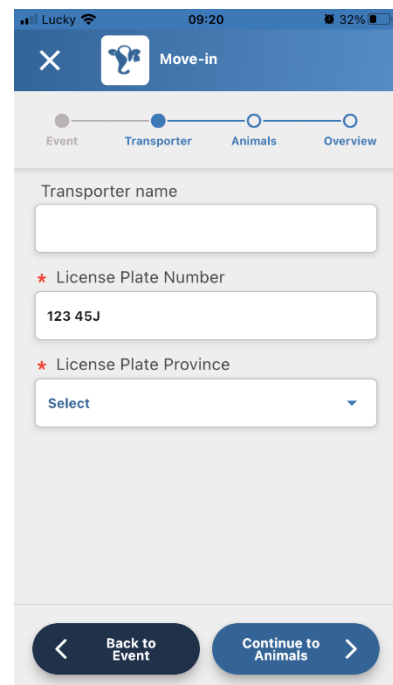
Insert the name of the transporter.

License Plate Number:

Insert the license plate number of the transporter (either truck or trailer).

License Plate Province:

Select the origin province of the license plate from the drop-down menu.



4.1.3 Import

Reporting Date:

This is automatically populated to the current date and time and cannot be modified.

Premises of Arrival:

If you have more than 1 Premise linked to your account, click on “Premises magnifying glass icon” to indicate which of your premises the animal is housed in. Select the desired premise.

Departure Country:

Indicate the animal’s originating location by entering the country and address information of where the animal came from.

Notes:

Optional information you might want to add that will be linked to the animal event

4.1.3.1 2nd Page – Transporter (only appears for movement events)

Transporter Name:

Insert the name of the transporter.

License Plate Number:

Insert the license plate number of the transporter (either truck or trailer).

License Plate Province:

Select the origin province of the license plate from the drop-down menu.

4.1.4 Move-out (optional)

Reporting Date:

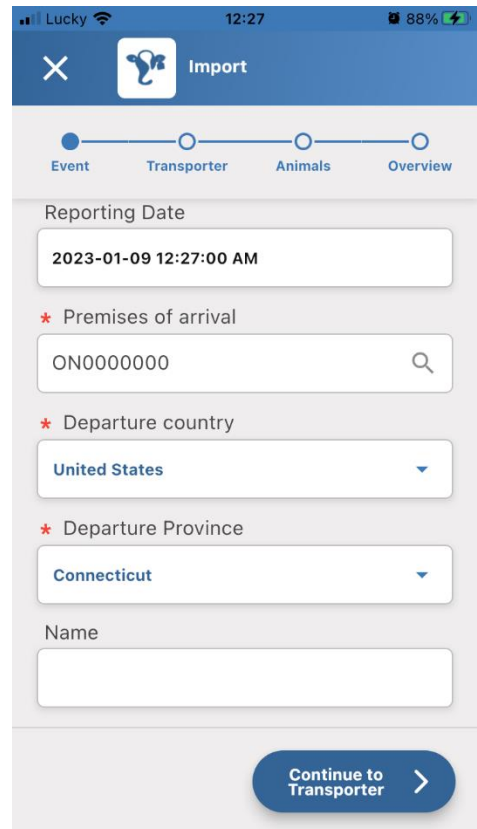
This is automatically populated to the current date and time and cannot be modified.

Premises of Departure:

If you have more than 1 Premise linked to your account, click on “Premises magnifying glass icon” to indicate which of your premises the animal is housed in. Select the desired premise.

Additional Information:

You can choose extra information to provide more details on the nature of the movement. (ie. Disappearance, shipped for slaughter, sold, dead stock pickup, fairs).



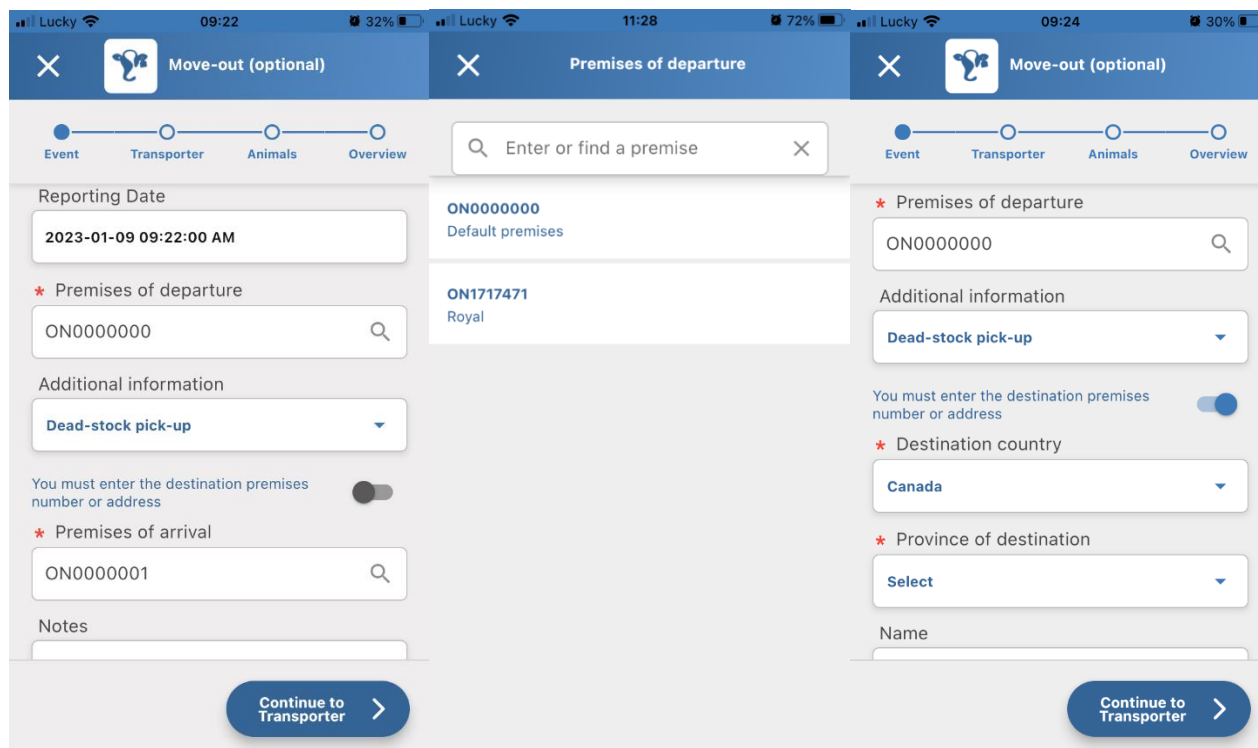
Premises of Arrival:

Indicate the animal’s arrival location (where the animal is going to) by entering a valid origin premises number or you can click the Toggle bar and enter in an address instead if you do not know the Premise ID of where the animal is headed.

- If you have added Premises to your Address book in the portal, you can click the “Premises magnifying glass icon” and choose from the list of those premises.

Notes:

Optional information you might want to add that will be linked to the animal event.



4.1.4.1 2nd Page – Transporter (only appears for movement events)

Transporter Name:

Insert the name of the transporter.

License Plate Number:

Insert the license plate number of the transporter (either truck or trailer).

License Plate Province:

Select the origin province of the license plate from the drop-down menu.

4.1.5 On-Farm Disposal/Tag Retirement

Reporting Date:

This is automatically populated to the current date and time and cannot be modified.

Premises of Death:

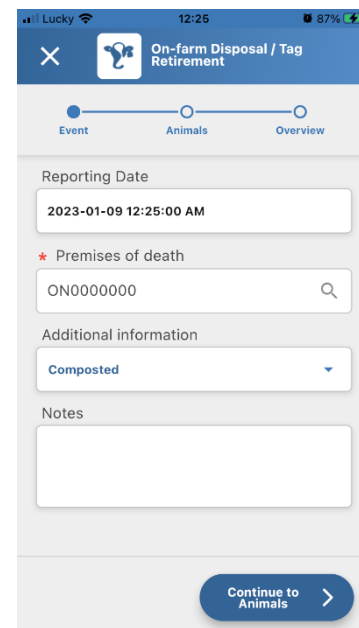
If you have more than 1 Premise linked to your account, click on the “*Premises magnifying glass icon*” to indicate which of your premises the animal was disposed at. Select the desired premise.

Additional Information:

You can choose extra information to provide more details on the nature of the death. (ie. Buried, composted, predation, for personal usage).

Notes:

Optional information you might want to add that will be linked to the animal event.



4.1.6 Export

Reporting Date:

This is automatically populated to the current date and time and cannot be modified.

Premises of Departure:

If you have more than 1 Premise linked to your account, click on “*Premises magnifying glass icon*” to indicate which of your premises the animal is housed in. Select the desired premise.

Destination Country & Address Information:

Indicate the animal’s destination location by entering the country and address information of where the animal is going to.

Notes:

Optional information you might want to add that will be linked to the animal event

4.1.6.1 2nd Page – Transporter (only appears for movement events)

Transporter Name:

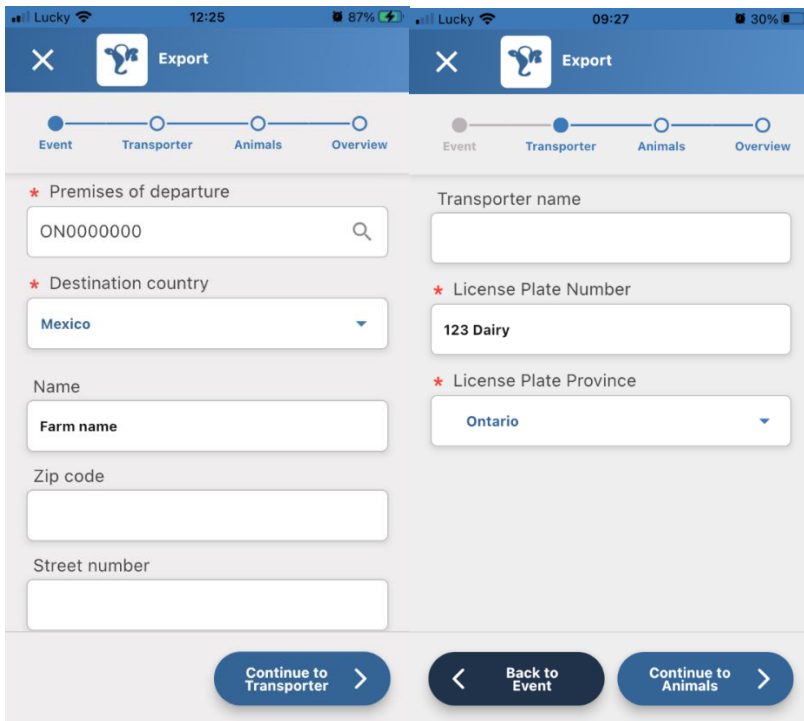
Insert the name of the transporter.

License Plate Number:

Insert the license plate number of the transporter (either truck or trailer).

License Plate Province:

Select the origin province of the license plate from the drop-down menu.



Export

Event Transporter Animals Overview

* Premises of departure
ON0000000

* Destination country
Mexico

Name
Farm name

Zip code

Street number

Transporter name

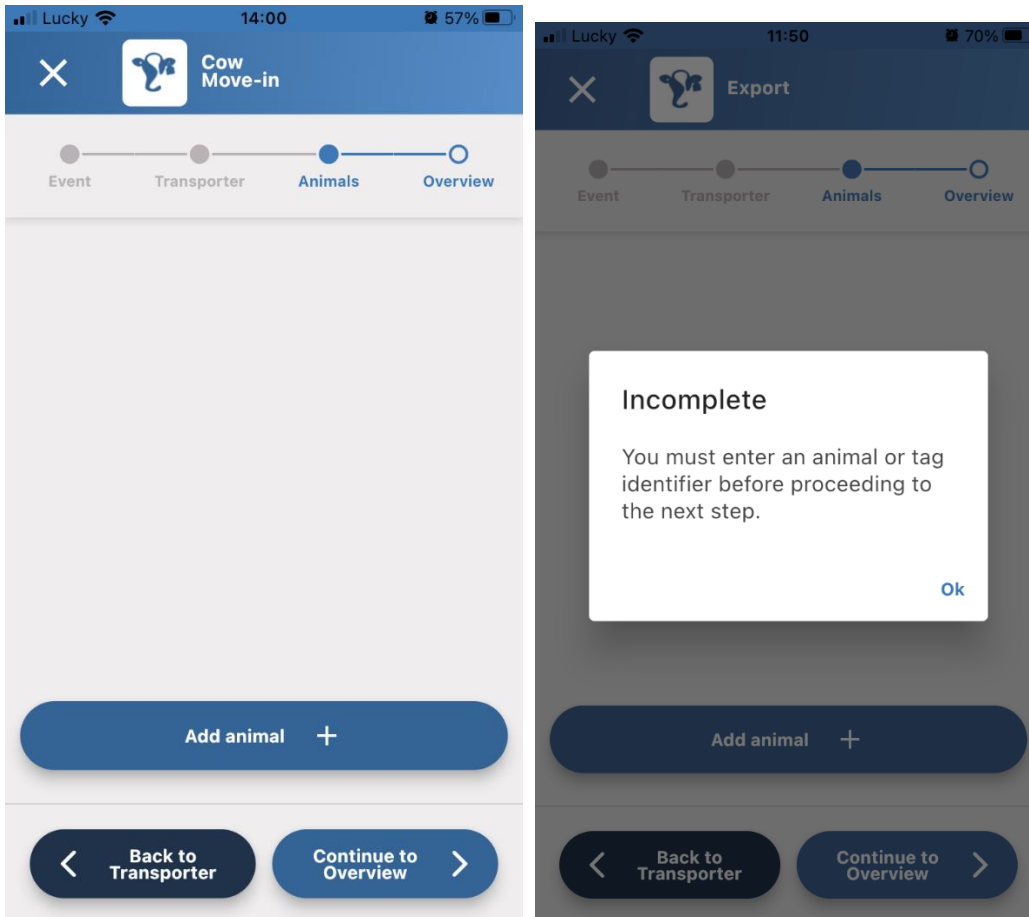
* License Plate Number
123 Dairy

* License Plate Province
Ontario

Continue to Transporter > < Back to Event Continue to Animals >

4.2 “Animals” Section

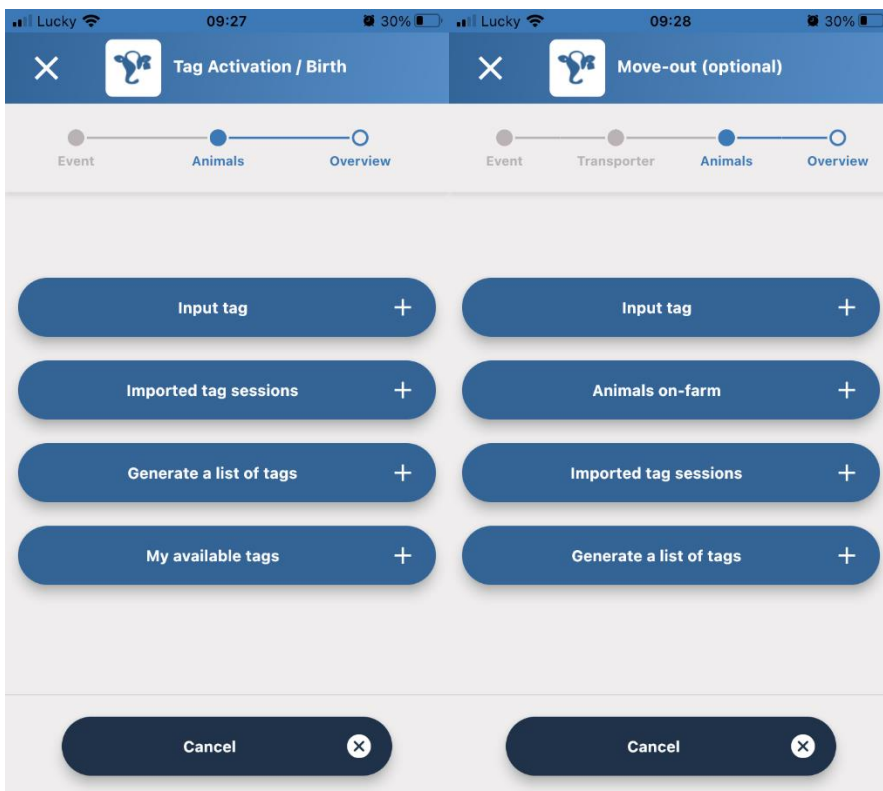
This section shares the same screen and processes for all event types. Click on **“Continue to Animals”** to access the *“Animals”* section and enter the tag numbers related to this event type and Premises information. Then click **“Add animal”**.



*You will not be able to continue to the next page until you have entered an animal.

At this stage, you have several options on how to add animal(s) to your event:

- 1- Select one of the four options:
 - a. Input tag.
 - b. Select numbers from either your **“My available tags”** inventory OR select an animal from your **“On-Farm Animal list”**.
 - c. Select numbers from your lot of imported tags with your reader.
 - d. Choose to generate a list of tag numbers.



4.2.1 Options to select animals or tags

4.2.1.1 Manual entry - Input Tag

If you choose manual entry: click on “**Input Tag**”, to open the entry window and complete the mandatory information fields indicated by a red star (*). Information will be different depending on the type of event you are reporting.

Helpful Tips: All tag numbers require the full 15-digit number (i.e., 124000012345678). All Canadian tags start with 124 and are followed with filler 0s that are placed before the animal’s 8- or 9-digit identifier number. A message will appear to advise you on how many digits you have entered already.

When you are done, simply click on “**save**”. You can do these steps for as many animals that you have to report on the same event type (same premises & transporter information).

The image displays three sequential screenshots of the DairyTrace mobile application interface for manual entry of animal tags.

- First Screenshot (Move-in):** Shows the 'Animals' tab selected. A numeric keypad is visible for entering the animal identification number. The number '124000000000012' is entered. A red star (*) indicates a mandatory field.
- Second Screenshot (Tag Activation / Birth):** Shows the 'Animals' tab selected. Fields for 'Animal identification number' (12400001234567), 'Entry Date' (2023-01-09), 'Sex' (Female), and 'Birthdate' (2023-01-08) are visible. A red star (*) indicates a mandatory field. A message states: "Tags are 15 digits long. Current count: 14".
- Third Screenshot (Move-in):** Shows the 'Animals' tab selected. The animal identification number is entered as '124000000000012, F'. Buttons for 'Delete' and 'Edit' are visible. An 'Add animal +' button is also present.

4.2.1.2 *Animals on-farm inventory*

When reporting, move-outs, exports, cross references or on farm disposals you can choose to select identifiers from your on-farm animal inventory: On the menu, select **“Animals on-farm”**.

Select the tag(s)

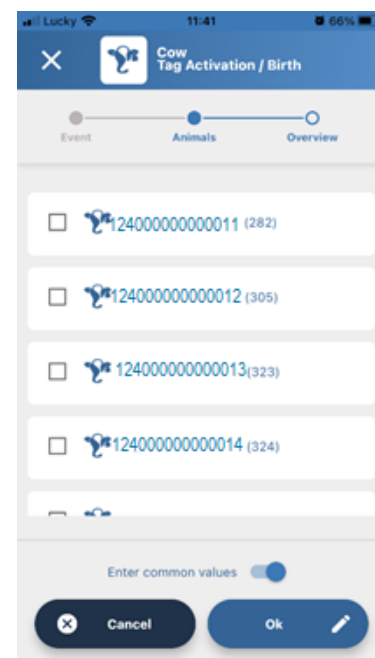
Select one or more tags numbers, for which you wish to report on, then click on **“OK”**.

4.2.1.3 *Inventory of available tags*

For tag activation/birth events, you can choose to use the inventory of your tags that have not yet been used: in the menu select **“Available tags”**.

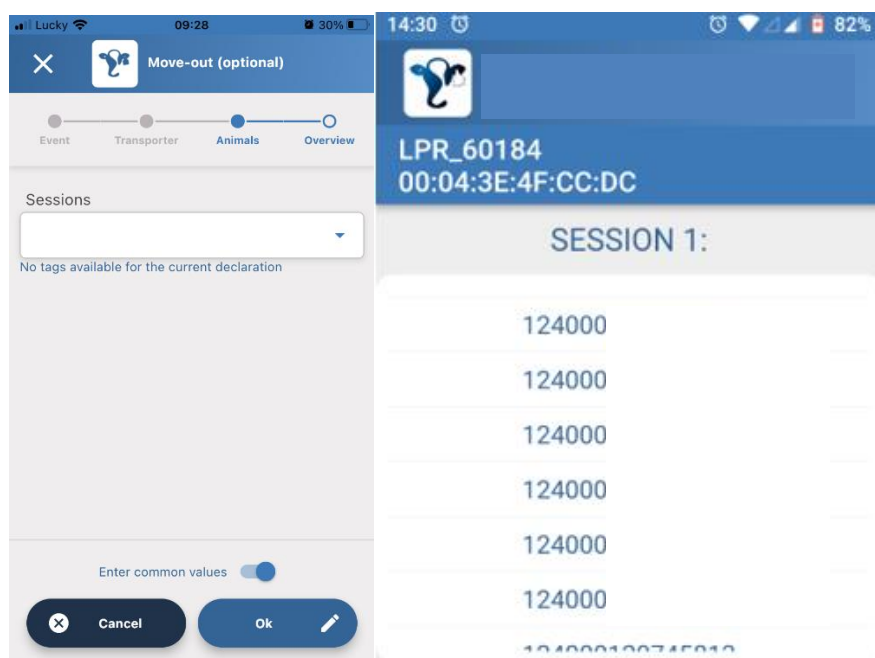
Select the tag(s)

Select one or more tag numbers, for which you wish to report on, then click on **“OK”**.



4.2.1.4 *Importing a session of tags*

If you have previously uploaded tags from one of your own Bluetooth tag readers, choose to use the numbers imported from your reader: **“Imported tag sessions”**.



Import the tag(s) number(s) from the session that has previously been downloaded (through the main menu option Tag Reader). *For more details on how to do this, see section 6 – Tag Readers.

Select one or more tag number for which you wish to report on, then click on **“OK”**.

4.2.1.5 Generate a List of Tags

If you choose to create a list that are all in a sequence of tags manually: On the menu select **“Generate a Tag List”**.

Insert The First Number:

Click on **“Enter Starting Tag Number”** and insert the first number (*full 15 digits*) in your sequential list.

Number Of Tags to Generate:

Click on **“Number of Tags To Generate”** to indicate the number of tags to be generated from the number of tags previously inserted.

For example,

Starting number: 124000012345678

Number of tags to generate: 5

The list of tags that will be inputted for individual animals will be:

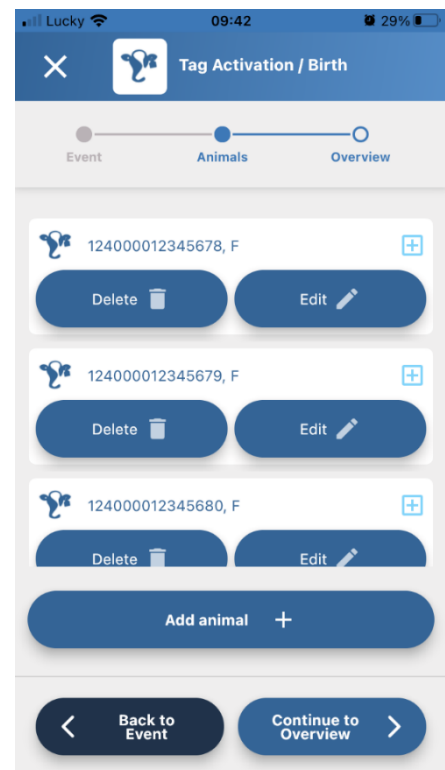
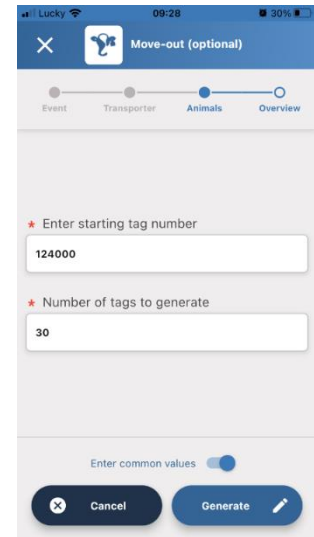
124000012345678

124000012345679

124000012345680

124000012345681

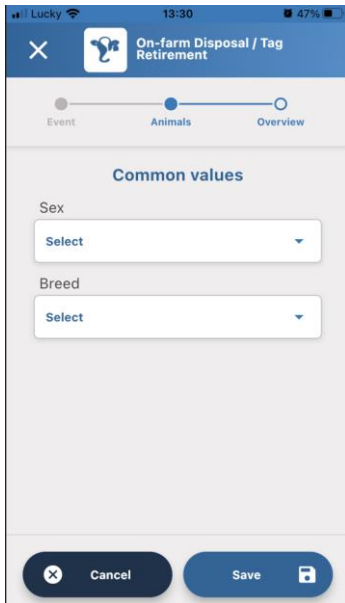
124000012345682



4.2.2 Enter Common Values

When you choose more than one animal from a list, the function of Common values appears as an option. This provides you the option to enter in common values for each of the tags selected. If there are no common values, do not enter anything and click “Save”.

The fields of this option will be different depending on the type of event you are reporting for. They would be attributed to each selected tag but can also be edited for each individual animal/tag entry.

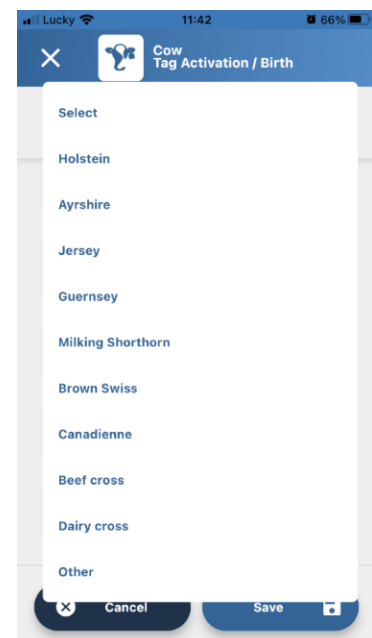


4.2.2.1 Sex & Breed Options:

Additional information can be entered for each animal at various steps throughout the event reporting process. Wherever **Sex** and **Breed** appear, you can choose the correct information per animal from the drop-down menus.

Sex – Male, Female, Freemartin or N/A

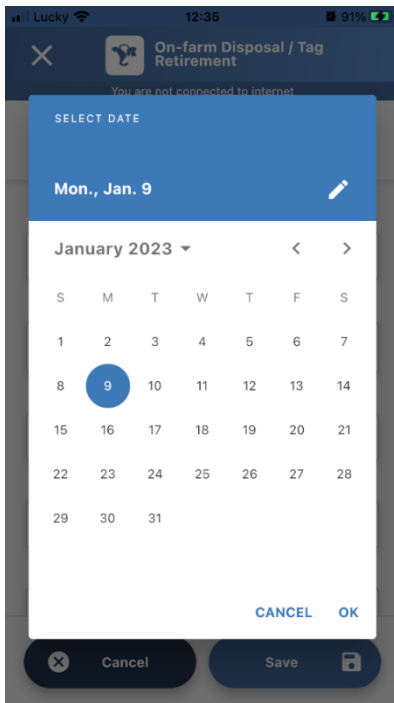
Breed – Holstein, Ayrshire, Jersey, Guernsey, Milking Shorthorn, Brown Swiss, Canadienne, Beef Cross (*DairyXBeef*), Dairy Cross (*DairyXDairy*), Other



4.2.3 Complete the information related to the animal

Click on “**Edit**” for each animal to complete the required data information specific to that animal. The fields indicated by a red star (*) must be completed.

For entering any dates, click on the calendar icon, choose the date, and click **OK**:



The data fields offered depend on the type of event you are reporting for. See below screen shots for each event type.

Tag Activation / Birth

Event **Animals** Overview

* Animal identification number
1240000

* Birthdate
[Calendar icon] [Clock icon]

Date of tag application
[Calendar icon] [Clock icon]

Sex
Female

Breed
Select

Cancel Save

Tag Reissued

Event **Animals** Overview

* New tag number
124000

* Date of tag application
[Calendar icon] [Clock icon]

Sex
Select

Breed
Select

Alternate identification
[Text field]

Cancel Save

Cross Reference (previous tag # known)

Event **Animals** Overview

* New Tag Number
1240000

* Previous Tag Number
124000

Date of tag application
[Calendar icon] [Clock icon]

Sex
Select

Breed
Select

Cancel Save

Replacement (previous tag # not known)

Event **Animals** Overview

* New tag number
1240000

* Date of tag application
2022-12-15 [Calendar icon] 00:00 [Clock icon]

Sex
Select

Breed
Select

Alternate identification
[Text field]

Cancel Save

On-farm Disposal / Tag Retirement

Event **Animals** Overview

* Animal identification number
1240000

* Death Date
2022-12-01 [Calendar icon] 00:00 [Clock icon]

Sex
Select

Breed
Select

Alternate identification
[Text field]

Cancel Save

Import

Event Transporter **Animals** Overview

* Animal identification number
124000

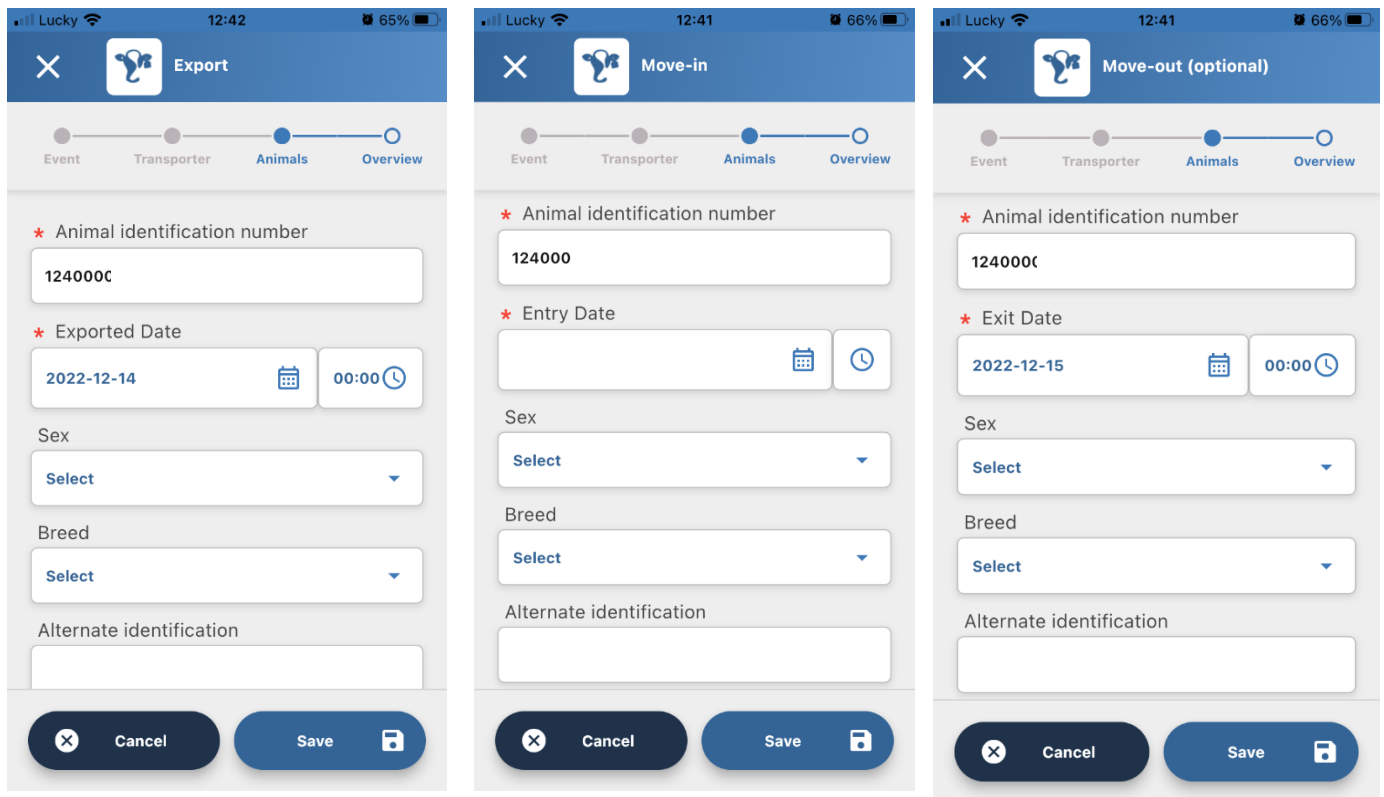
* Imported Date
[Calendar icon] [Clock icon]

Sex
Select

Breed
Select

Alternate identification
[Text field]

Cancel Save



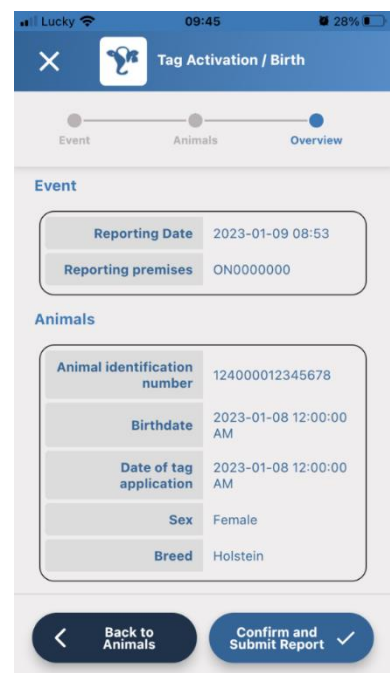
Click on **“Save”** when you have completed the information for an animal. Repeat as necessary or click on **“Continue to Overview”** to go to the next step.

4.3 “Overview” Section

This display allows you to review the information entered for each animal.

To change or edit the content, click on **“Back to Animals’** and edit the animal where the information is incorrect.

When the review is complete, click on **“Confirm and Submit Report”** to save your declaration(s).

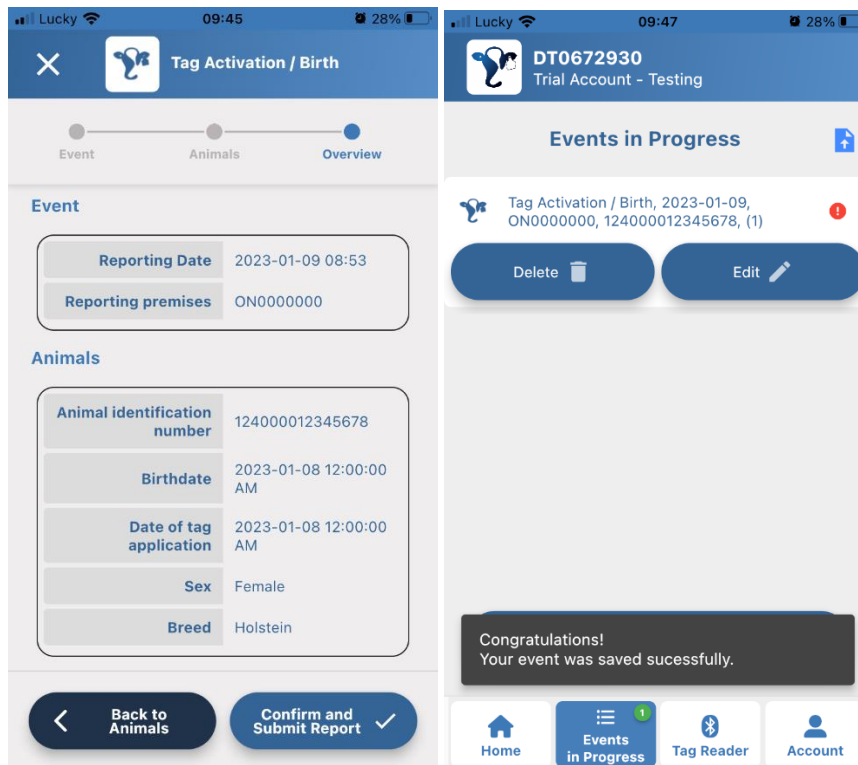


5 Submitting the report(s) using *DairyTrace Mobile*

5.1 Successful event report submission

To submit the event report(s), you must click on “**Confirm and Submit Report**”. Every report without any errors will automatically be submitted to the DairyTrace database.

You should see a pop up along the bottom that indicates **Congratulations! Your event was saved successfully**. Once successfully submitted, the event **will no longer** appear on your Events in progress page.



Helpful Hint: Events that were completed (by clicking **Confirm and Submit Reports**), while offline will be sent to the server automatically in the below situations:


- when reopening the app.
- when clicking the sync button on the home page
- when clicking Events in progress tab button
- when clicking the upload button (small blue page and arrow icon on the Events in Progress page)




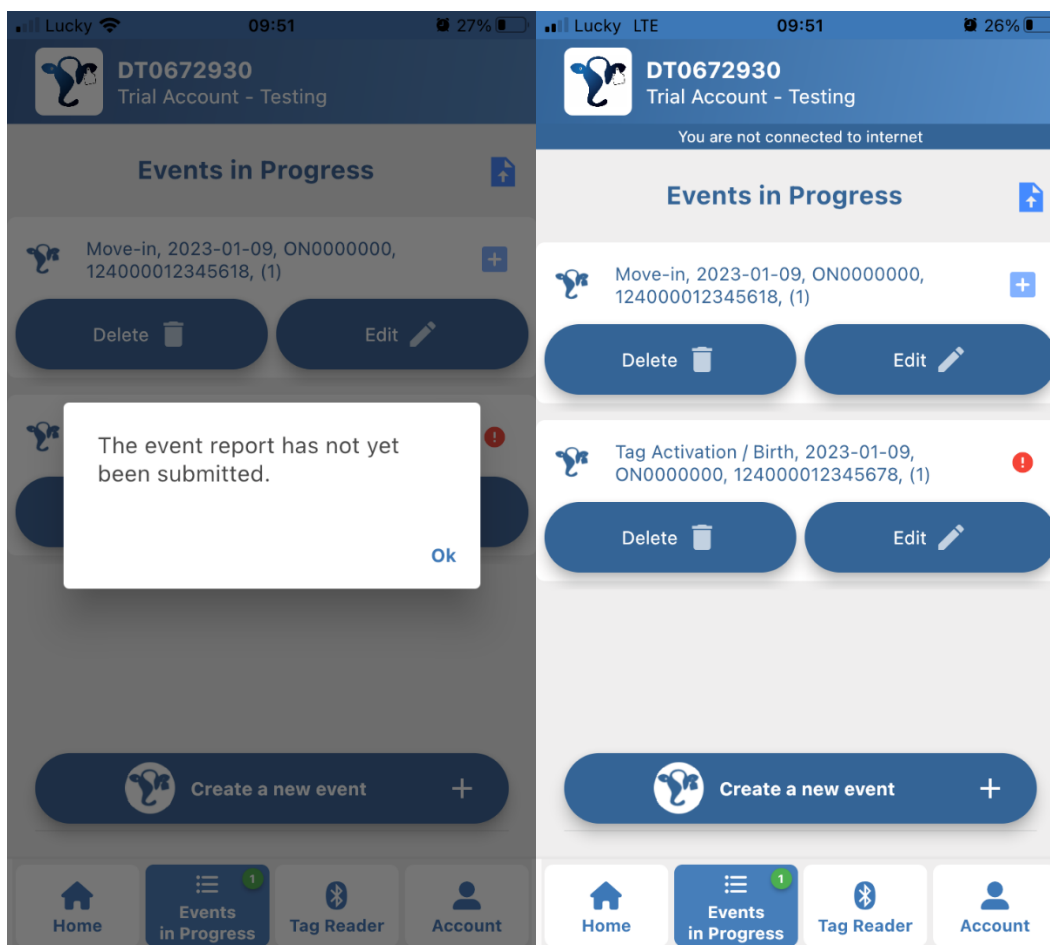
5.2 Events Reported

5.2.1 Events have not yet been submitted



If you have an event listed in your events page there are 2 reasons why it is listed:

- 1)  The connection (data or wifi) was not strong enough and was not able to attempt to submit, or it did not submit the event. Or when working through the event, the user quit the event rather than going through the steps and clicking “Confirm and Submit Report” in the Overview page.
 - If you click the blue plus icon, the message **“The event report has not yet been submitted”** appears.
 - Check to see if you have a Ribbon “You are not connected to Internet”. Check your internet settings & connection strength and try to resubmit.

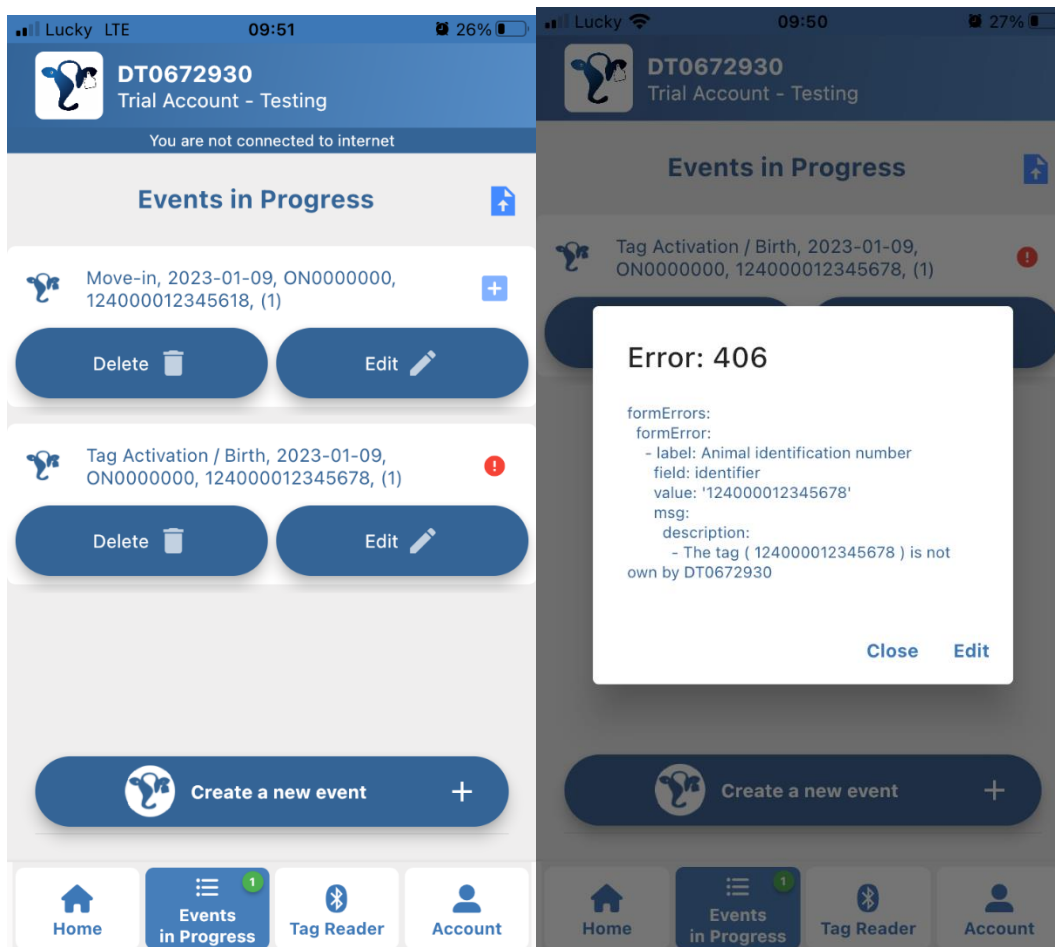
- 2)  An error stopped the event from being submitted. This needs to be fixed and resubmitted at the **Overview** page for the event to be submitted.



5.2.2 Error Messages

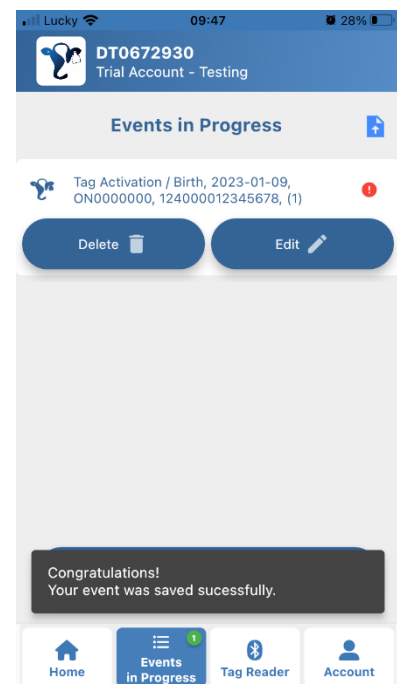
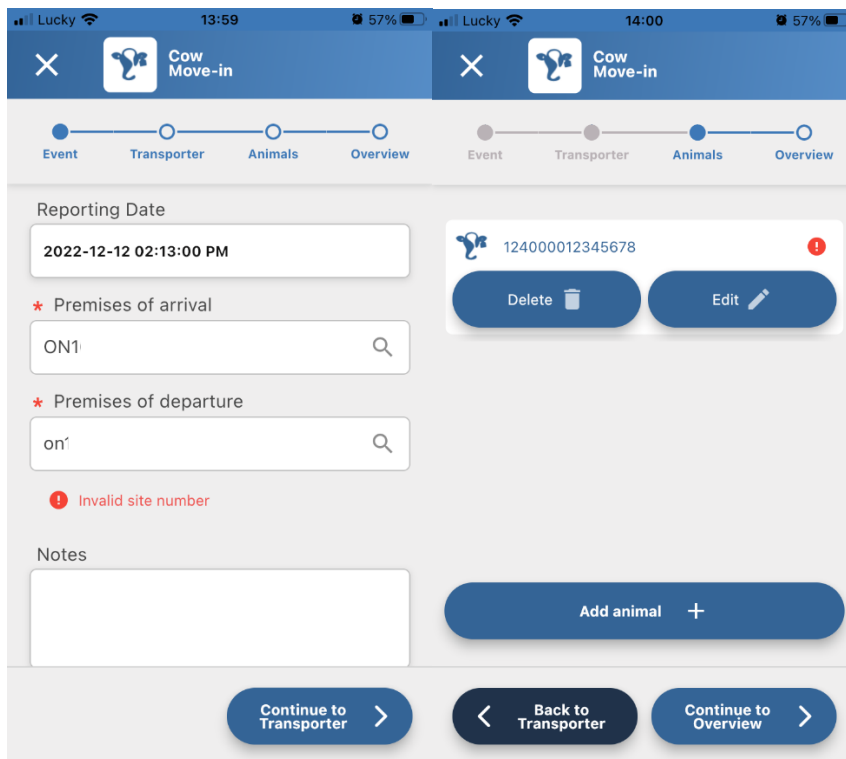
If your report(s) contain errors, a red exclamation mark  will appear to indicate the error.  If you click this icon, it will let you know information about the error:

- Error Message (406) – This is the same code used for all errors/corrections required.
- Label & Field – Which section of the event report is wrong.
- Value – If it is related to a tag identifier, it will indicate the tag number.
- Msg Description – Short description of the error (see potential errors below)
 - o *Tag is not owned by (the account number)*
 - o *Premise ID site is not valid*
 - o *Field is empty, you must complete it*
 - o *Tag has no valid re-issue*
 - o *Date of birth is not equal to or less than reporting date*
 - o *Tag application date is not equal to or greater than birthdate*



If you click **“edit”** the event will open or you can click **“close”** and then edit the event from the Events in Progress Page.

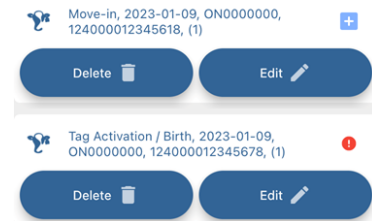
- 1) Go through each section of the event report and when you see the red exclamation mark , the fields that require corrections are **identified in red with an explanation to correct the error**.
 - a. As an example, the 1st image below- the premises entered for this event is not valid
 - b. 2nd image below -, the error is linked to the animal information for the event.
- 2) Complete the fields with the information requested, then continue through the remainder of the steps until you can **“Confirm and Submit Report”** on the Overview page.



If everything is properly corrected, all reports will be submitted to DairyTrace and the home page will indicate, **“Congratulations! Your event was saved successfully.**

5.3 Deleting entries from your lists

Click on the trash can icon **“Delete”**, for the event report/animal that you wish to delete. This option appears in both the **“Events in Progress”** or **“Animals”** lists.

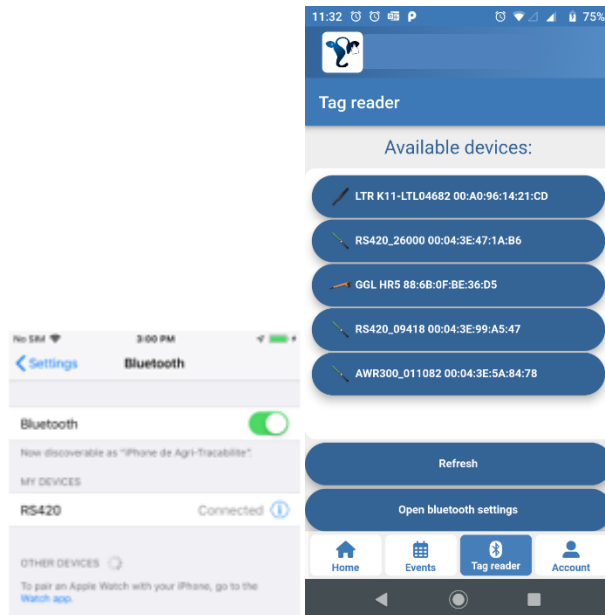


6 Downloading tags from the reader

6.1 Bluetooth Settings

In the menu **“Tag Reader”**, check your specific phone settings by clicking **“Open Bluetooth Settings”** or by going into your phone settings, and make sure that your phone has the Bluetooth turned on and recognizes the Tag Reader.

- If the Tag Readers appear on your phone Bluetooth list, then they should also appear in the App under Tag Reader as an Available device.



6.2 Download Tags

Select the device you wish to download the tags that you have previously read with the reader.

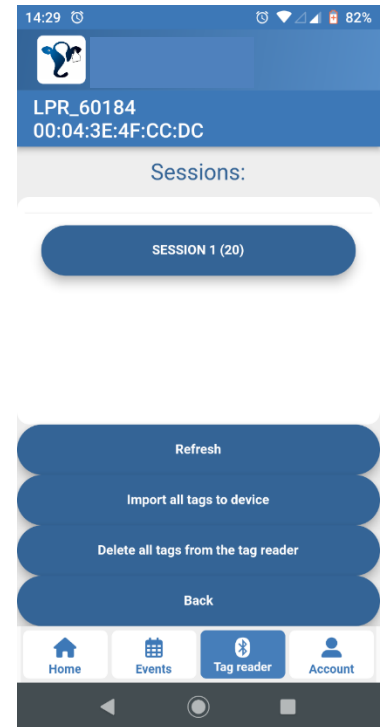
Choose one of the following options:

- Session (to open a specific session of tag reads)
- Refresh the Bluetooth connection
- Import all tags to device (downloads all the tags from all sessions that appear from that tag reader).
- Delete all tags from the tag reader (clears the tags from the reader and does not download them into the app).
- Back (go to previous page)

6.2.1 Session

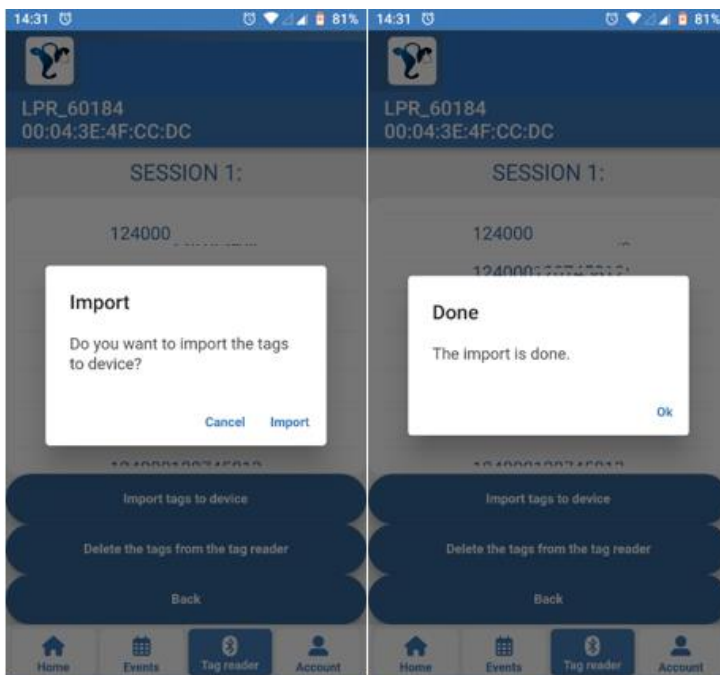
It will show you a list of the tags in that session, from which you can choose the action of:

- Import tags to device
- Delete tags from the tag reader
- Back



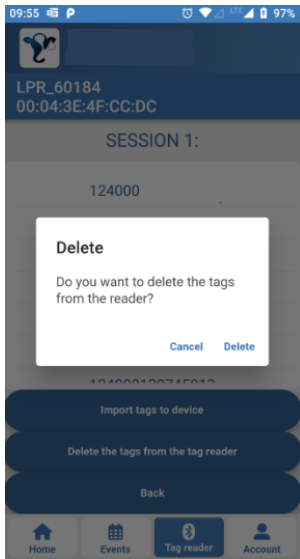
6.2.1.1 Import Tags to Device

If you wish to import all the tags in the session, Click **“Import”** from the pop-up Message. Once you see the pop up **“Done”** then your tags are then imported for you to use when you create an event and choose to select from the list of tags from Imported sessions.



6.2.1.2 Delete Tags from Reader & Device

If you would like to clear the tags from the reader so they will not appear on any future download, click **“Delete the tags from reader”**. Then click **“Delete.”**



7 Account Settings

Click on **Account** to access the page for managing settings.

Account Info:

This shows the current DairyTrace account number, name and address that the App is reporting on behalf of.

Switch Account:

This option allows you to change the active stakeholder if you have more than one stakeholder number/account linked to your user account.

Language

App settings are available in French and English.

Theme

Settings are available to change between Light or Dark mode.

Memory

This option allows you to free up memory on your phone by deleting the declarations that you no longer need to keep. These will only be deleted from the phone and not from the DairyTrace database. Select the desired option and click on “Free memory”.

Version

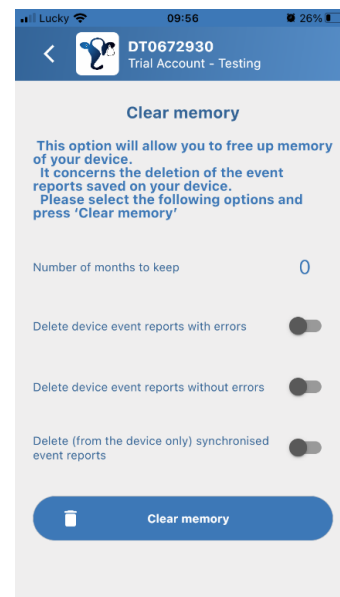
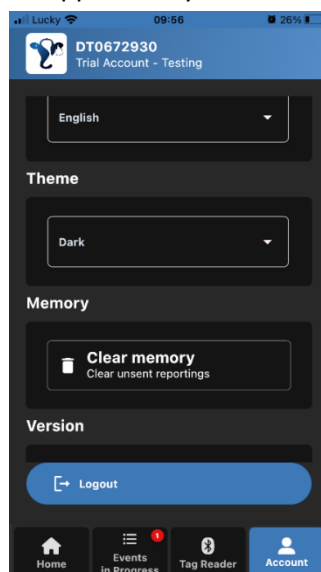
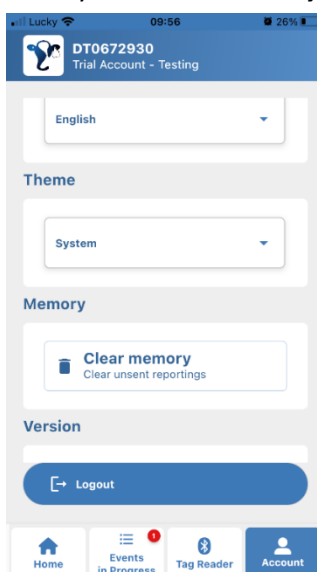
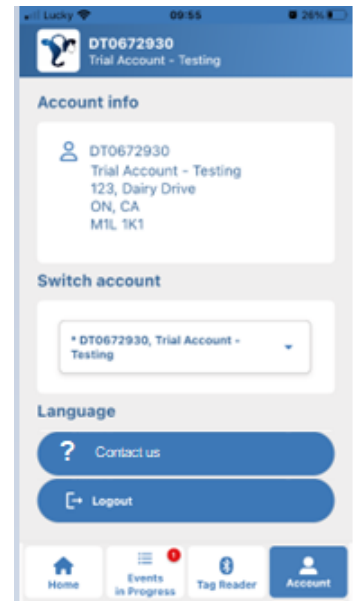
The current version of the app that is downloaded on your device.

Contact Us

Provides the hours of operation and contact information for Customer Services.

Logout

Allows you to exit the **DairyTrace Mobile** app securely.





**Support for Provinces
Outside of Quebec**
Toll-free: 1 866 558-7223
(1 866 55-TRACE)
Email: info@DairyTrace.ca

DairyTrace
660 Speedvale Avenue West, Suite 101
Guelph, Ontario, N1K 1E5
info@DairyTrace.ca
www.DairyTrace.ca

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