Order Processing

Revision Date
March 30, 2016

CT version 1.9.6.42

This guide provides an overview to germplasm order processing in GRIN-Global (GG). It explains the steps involved when a germplasm requester ("requester") using the GG Public Website requests accessions and the institution processes the incoming order. The genebank's processor ("order fulfillment person") uses the Curator Tool and typically the CT's Order Wizard to manage the incoming order.

The Appendix contains this document's revision notes. To review the Curator Tool's version changes, please refer to the online Curator Tool User Guide.

Review the Table of Contents which contains links to the document's sections

Comments/Suggestions:
Please contact feedback@ars-grin.gov with any suggestions or questions related to this document. This and other GRIN-Global –related documentation can be downloaded from the GRIN-Global Training page.

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Orders Overview

Genebank clients may send request for germplasm ("request orders") through various means:

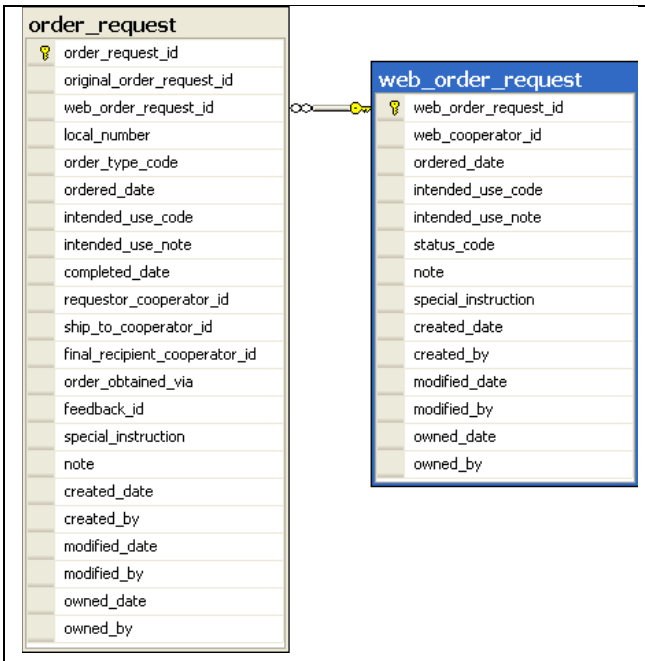
- GRIN-Global public website (PW)
- email
- faxes
- telephone

Each organization will determine their valid methods for accepting orders. This document describes how orders can be processed in GRIN-Global, with the emphasis is on receiving orders via the Public Website. Typically, germplasm requesters will search an organization's GRIN-Global PW for accessions and then add them to their shopping carts – eventually submitting their carts for order processing.

The "shopping cart" feature is modeled after other websites – the user can continue "shopping" and add items (in this case accessions) into the cart. Assuming the user is logged in, she can also add items to a "wish list" and check on her order history.

Relationship of "Standard" Orders to Public Website Orders

Because the Curator Tool and the Public Website are independent programs – you do not need one to run the other – the order requests entered into the Public Website by researchers and other public requesters are not stored *directly* in the GRIN-Global standard order tables. Instead, incoming Public Website orders must be converted into GRIN-Global "standard" orders.



Shown here are the table structures for the two order types. Notice that the order_request contains the web_order_request_id field so that it can link to a web_order_request. (Conversely, the web_order_request does not contain a key to the order_request. If a germplasm requester refers to an order number, she would be referring to her web_order_number.)

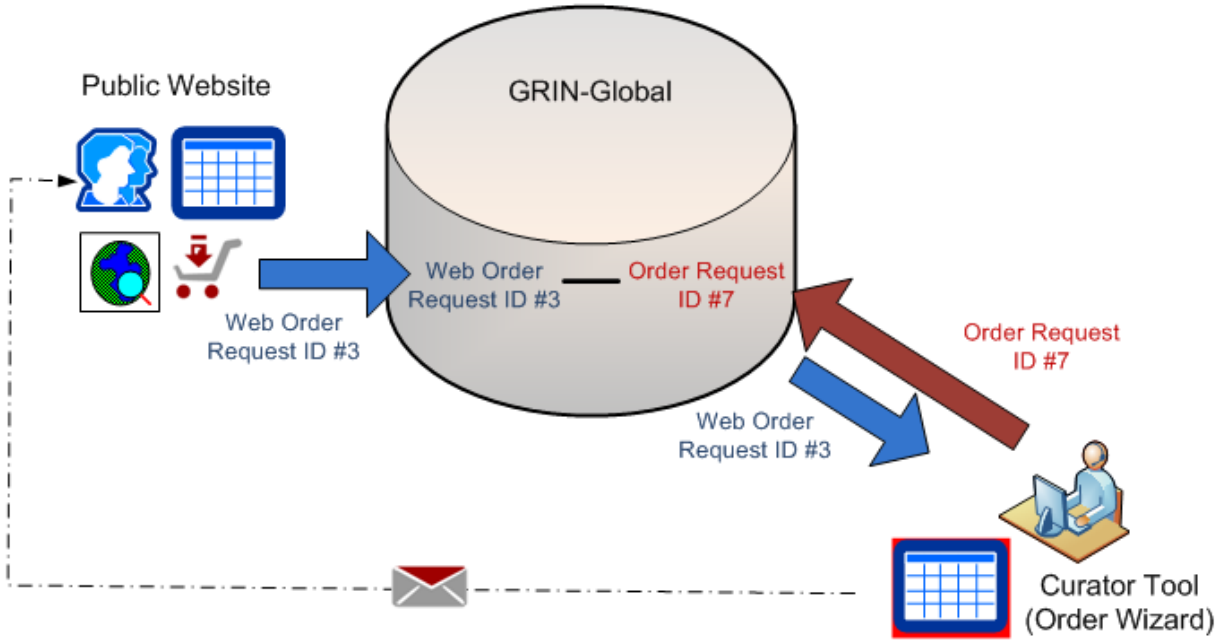
Genebank personnel will typically use the Curator Tool to input orders directly into GG in the **order_request** table. But they too can use the PW to input orders – it is a matter of preference and workflow which method a site may ultimately choose.

PW Order Processing

In GG, the germplasm requesters generally submit their orders via the GG Public Website. (Some organizations may also accept orders via the telephone or email.) Using the Curator Tool's Order Wizard, genebank personnel responsible for order fulfillment can review those incoming *web* orders and convert them into *standard* GRIN-Global orders.

During the order processing, genebank personnel will use the Curator Tool Order Wizard to manage and monitor the status of the order. (There are several order-related dataviews that can also be used in the Curator Tool, but the Order Wizard with its comprehensive windows uses business rules and greatly facilitates the order process.)

Public Web Orders to Orders Conversion (Diagram)



Note

During this order process, the Web Order Request record becomes the basis for a GRIN-Global Order record. The Web Order Request record's ID is its primary key field; the GG Order Request record created from it will have its own unique record ID. Although the records are inter-related, the two record IDs (and the records) are distinct.

Web Cooperators and *GG* Cooperators in the Curator Tool

Generally, the public website user creates his or her own web cooperator record. Note that two types of cooperator records exist in GRIN-Global: *web* cooperator records and *standard* (used within the CT). These two cooperator record types are stored in two different GG tables.

Using the Order Wizard, when processing an incoming request, a genebank employee can easily create a *standard* cooperator record from a *web* cooperator record or relate an existing *standard* cooperator record to a *web* cooperator record.

Note

To differentiate the two kinds of cooperator records throughout this document, we will specifically state "web" when referring to a web cooperator record. References to the standard GRIN-Global cooperator records will omit any prefix or may state "... standard cooperator record."

Order Request and Order Request Items Records

A germplasm order request has two main sections: the *order request*, which some refer to as the "order header," and the *order request items* section, which lists the details of the items being requested:

Order Request

Order Request	Ordered Date	Web Order Request Id	Local Number	Owner Site ID	Items	Order Type	Final Recipient	Intended Use	Special Instructions	Intended Use Note
7	3/8/2011 ...	3	2011-0308-1	SYS (n/a)	5	Distribution	Reisinger, Mar...	Education	hurry w/ the order	Public educatior

Order Request *Items*

Order Item ID	Order Request	Item Number	Accession	Inventory	Species	Quantity On Hand	Quantity On Hand Units	Quantity Shipped
14	7 - Reisinger, Martin, DBMA	1	PI 503262	PI 503262 88ncai01 SD	Helianthus tuberosus	7038	count	100
15	7 - Reisinger, Martin, DBMA	2	PI 503279	PI 503279 99ncaim1 TU	Helianthus tuberosus	0	count	5
16	7 - Reisinger, Martin, DBMA	3	PI 503271	PI 503271 95ncaim1 TU	Helianthus tuberosus	0	count	10
17	7 - Reisinger, Martin, DBMA	4	PI 503266	PI 503266 99ncaim1 TU	Helianthus tuberosus	0	count	5
18	7 - Reisinger, Martin, DBMA	5	PI 503265	PI 503265 85ncao01 SD	Helianthus tuberosus	0	count	0

The Order Request includes general information about the order, such as:

- the requester's contact information
- how the order was obtained
- who the ultimate recipient is

The individual items being requested are just that – the order request items (specific accessions). Each item will be stored as an individual record in the **order request *items*** table. In the previous example, the order contained 5 items.

Order Dataviews

In the Curator Tool, there are multiple order-related tables and dataviews used to display the order information. Since most order-related work is handled via the Order Wizard, working directly in the dataviews is discouraged. However, listed here for reference are some of the main GRIN-Global order-related dataviews:

Dataview	Description
order_request	Provides general information about the order such as the date and type of order, requester, final recipient, etc.
order_request_item	Lists the specific data about the material used to fill the order such as the Accession and Inventory IDs for the material, the Quantity On Hand, the Quantity Shipped, the form of distribution (seeds, grams, etc.) and the storage location from which the order was filled.
order_request_action	Every time the status of the order is changed, an Order Request Action record is generated. Statuses that are built into GG include **Shipped**, **Cancelled**, **Partially Shipped**, **Filled**, and so on. (Each organization can determine what ORDER_REQUEST_ACTION codes they need for their organization's order fulfillment process.)
web_order_request_attach	Attachments (.pdf, .docx, jpg, xlsx files, etc.) can be submitted with a web order (before the order is converted to a standard GG order). (Additional programming work needs to be done to allow additional documents be attached after the order is processed in the CT.) Attachments can also be directly dragged and dropped into this dataview in the CT.
web_order_request	Provides general information about web orders such as the date and type of order, requester, final recipient, etc. This web order request is generated by a requester using the GRIN-Global Public Website.
web_order_request_item	Lists the specific data about the web order material (this is the details portion of the web orders coming from the GRIN-Global Public Website)

NPGS Specifics - High-level Differences Between GRIN Classic and GRIN-Global

In GRIN the Data Prep tables were used when adding bulk orders (multiple orders at one time). With GRIN-Global most of the incoming orders will be web orders. Instead of emails, you no longer need to create spreadsheets to be used with Data Prep tables. (There aren't any "Data Prep" tables in GG; instead you can drag data from spreadsheets into GG dataviews.)

In GG you will still receive emails announcing the incoming web orders, but the data will already be in the web order, eliminating the need to copy the order specifics from the email's text.

Manually Creating Orders in the Order Wizard

If you need to manually input multiple orders at one time, you can use the drag and drop method to drop the order header information into the Curator Tool, via the **Get Order Request** dataview. After the orders have been added into GG, you then have two methods to get the order item data into the database.

Method 1: Dragging Order Items into the Order Wizard (recommended)

The first method is to create new orders in the Curator Tool's **Order Request** DV. Then start the Order Wizard.

In the Order Wizard, for each order, drag the order *items* data from the Search Tool, a spreadsheet, or the Curator Tool into the grid at the bottom of the order wizard. (Follow the links for the details.)

Note

Unlike other CT drag & drop operations, do not include any column headings. The Order Wizard will assume that if three columns are used, the data are accessions (prefix, number, and suffix), whereas when four columns are dragged, the fourth column is the type and thus the records being added are inventory records.

Method 2: Dragging Order Items into the Order Request Items Dataview (alternate method)

In the second method, after you have created the order requests, you could use the Curator Tool's **Get Order Request Item** dataview and drag and drop the order item data into that dataview for the orders. The **Order Number**, the **Accession**, and the **Inventory** are required fields. It is recommended that you also supply unique **Item Numbers** (especially use new Item Numbers if you are adding items to an order).

Germplasm Requester (using the Public Website)

Genebanks or institutions using GRIN-Global to manage their germplasm data will most likely implement the GG Public Website and ensure the PW is publicly available to their germplasm requesters. While it is not absolutely necessary for a requester to register an account on the Public Website, it certainly makes it easier for the user. A user with an account will be able to search his order history, create a "wishlist," and edit his profile, and have multiple shipping addresses which can be selected from for a specific order. Probably any serious user will ultimately create an account.

Detailed information on setting up and modifying a PW user account is contained in the online Public Website Guide and can also be found in the Public Website Help feature.

Order Wizard

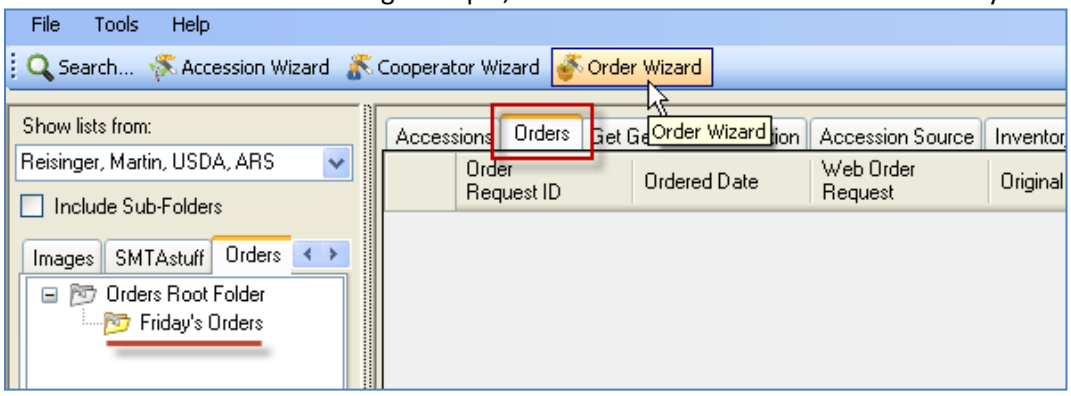
Rather than use the order-related dataviews, most Curator Tool users will find the Order Wizard to be more satisfactory for reviewing and managing order requests.

Processing Web Orders

Many, if not most of an organization's orders, will be generated from the GRIN-Global Public Website. Use the Order Wizard to convert these web orders into GG order requests.

Start the Order Wizard

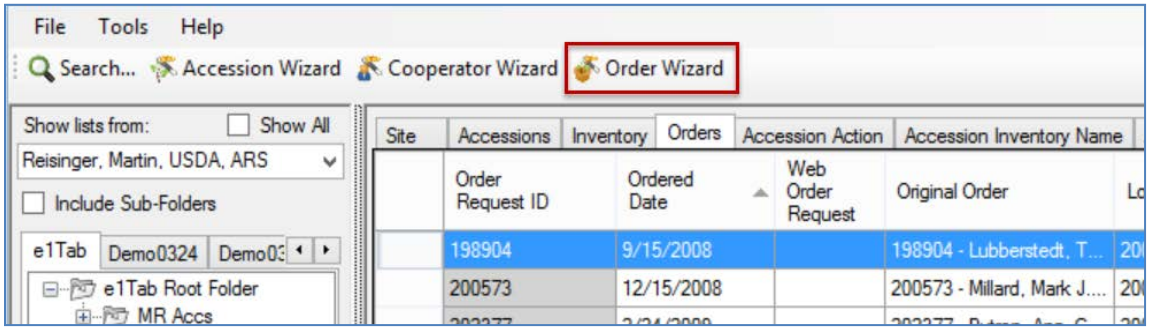
Although not absolutely necessary, before invoking the **Order Wizard**, in the Curator Tool, decide what list folder in the left panel will be your active list. Then, as you create and save new orders, you will be prompted to add corresponding orders to your active list. Another consideration not essential (but recommended), before clicking the Order Wizard button, open the **Order Request** dataview as the active dataview. In the following example, the user's active folder is labeled "Friday's Orders":



A user can organize his incoming orders by the day, week, month, or some other criterion, such as by genus or species. Alternatively, the folders may be set up for new orders, pending orders, completed orders, etc.

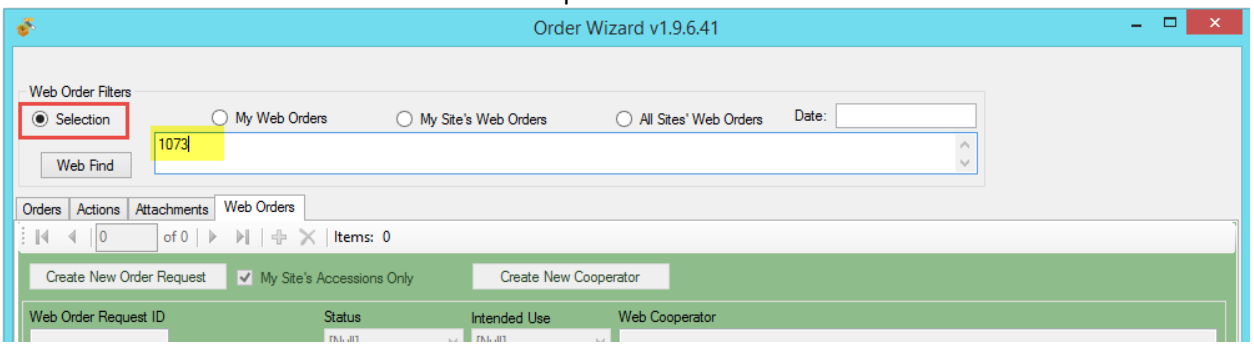
Start 1

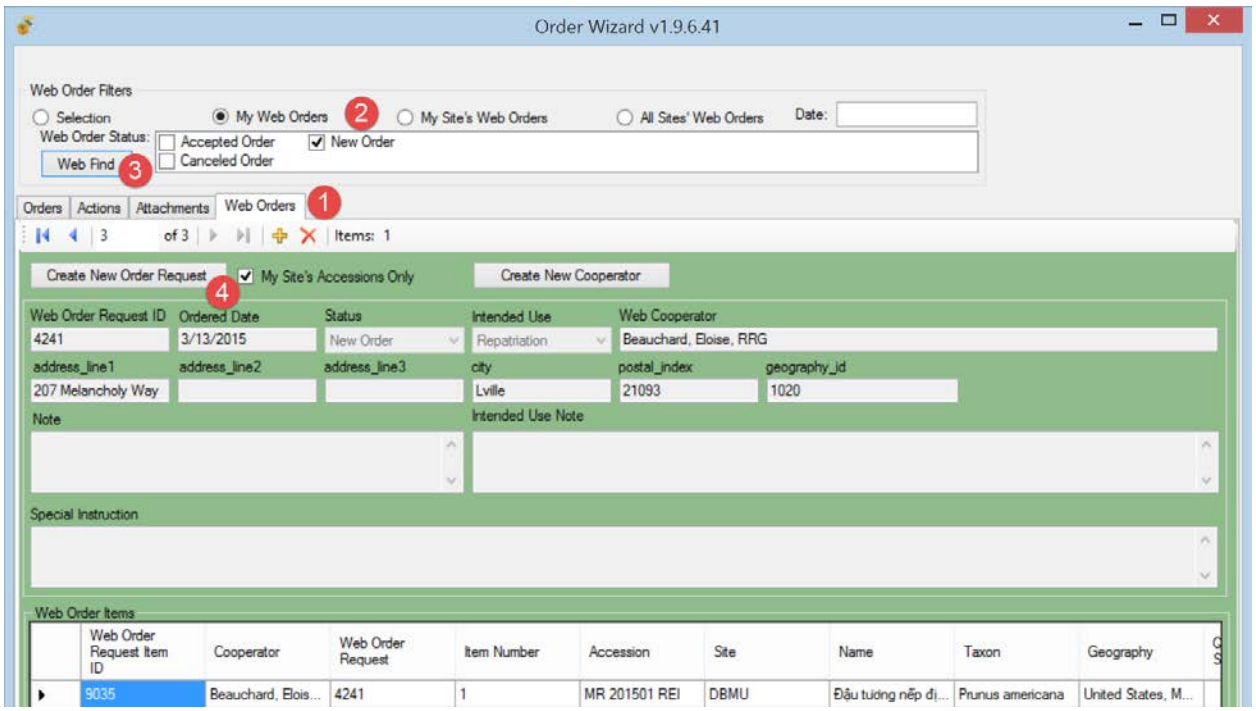
Start the Wizard by clicking the **Order Wizard** button:



Step 2

Click the **Web Orders** tab; select the appropriate radio button: (**Selection**, **My Web Orders**, **My Site's Web Orders**, or **All Sites' Web Orders)**; for processing new orders the **New Order** checkbox should be checked. Since the incoming web order generated an email message, the Selection radio button could be selected and then the Web Order number inputted into the **Web Find** box.

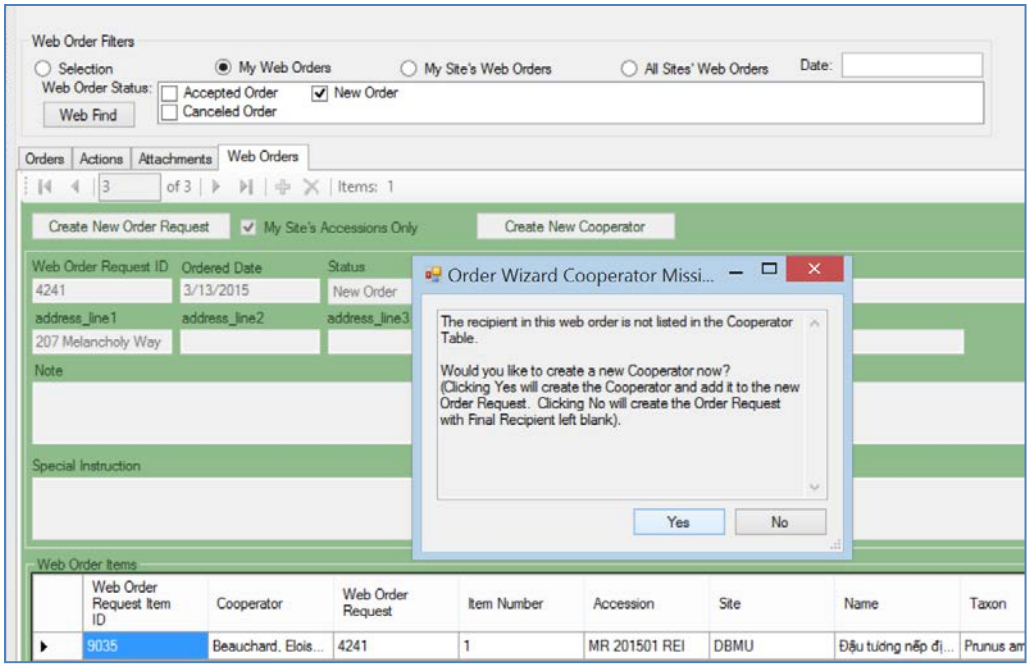




In the example above, there are three new web orders. (The Navigation Bar indicates "3 of 3.") The person using the Order Wizard can review each web order using the Navigation bar to move among the records. (The orders do not need to be processed in any specific sequence.)

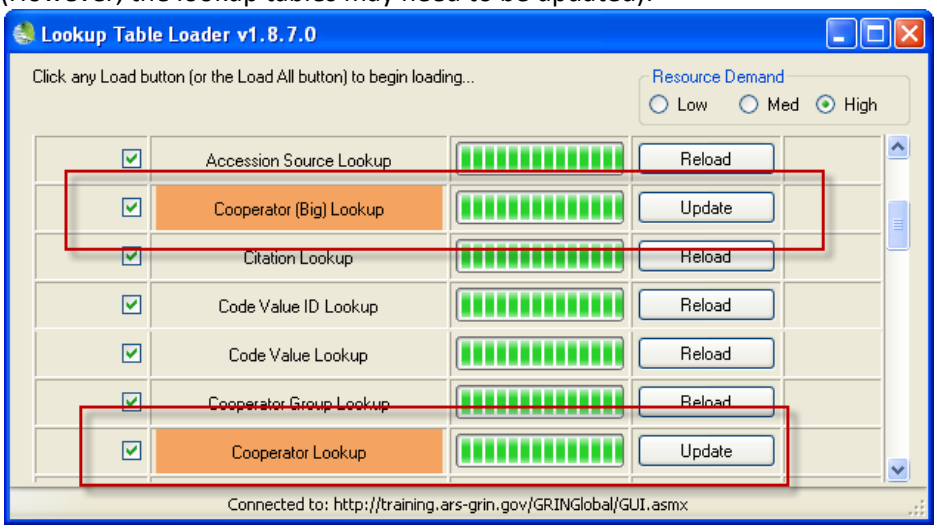
Step 3

Click the **Create New Order Request** button **(4, above)** to initiate a new GRIN-Global order request. If the incoming web order did not have a valid cooperator associated with it, you will be prompted to create a new cooperator:



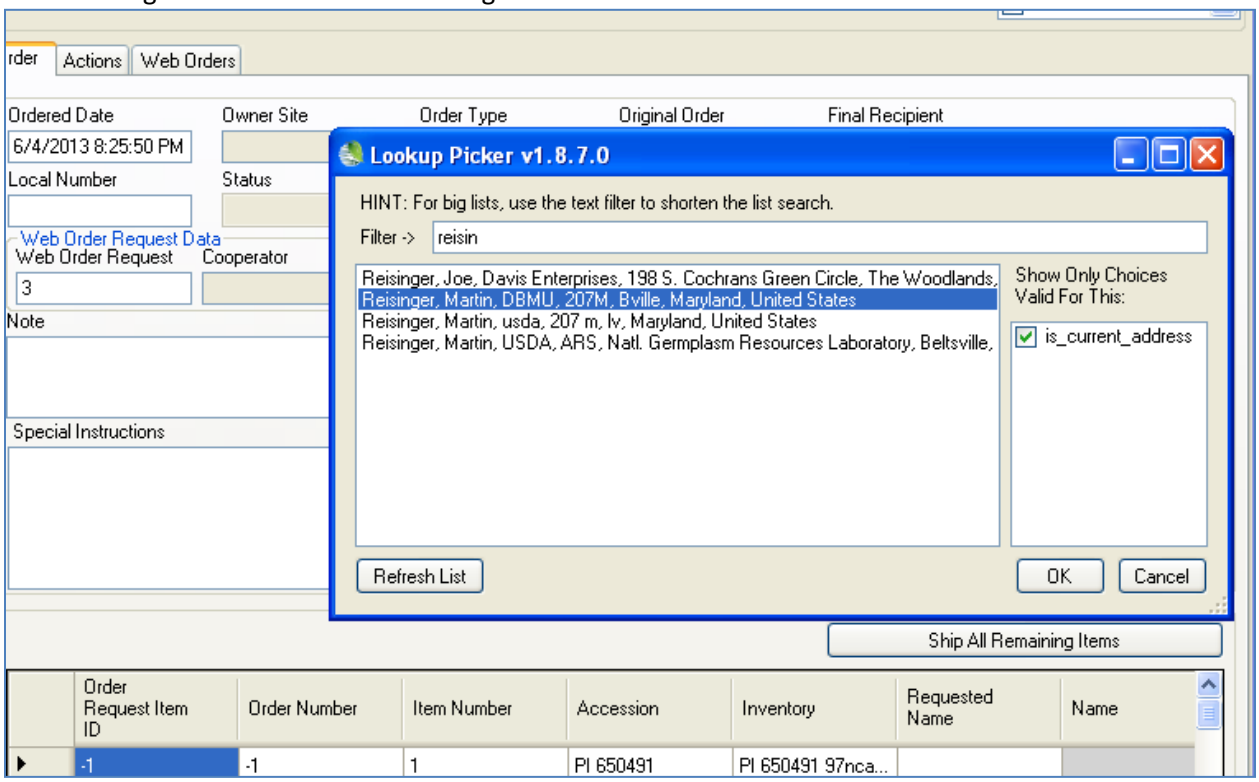
If the **Create New Cooperator** button is clicked when processing the web order, you will have an opportunity to generate a standard cooperator from the user's web cooperator information.

(However, the lookup tables may need to be updated):

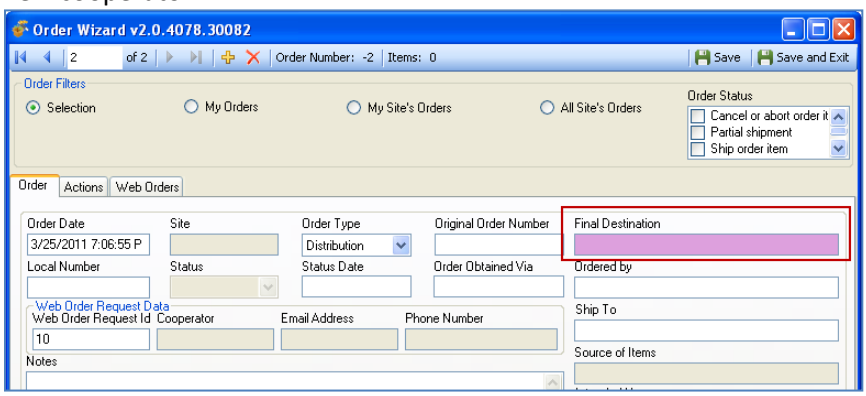


In this example, the genebank worker (order processor) clicked "Yes" to respond to the question "Would you like to create a cooperator now?" and then typed in the string "reisin" – the cooperators whose

surname began with that character string were listed:

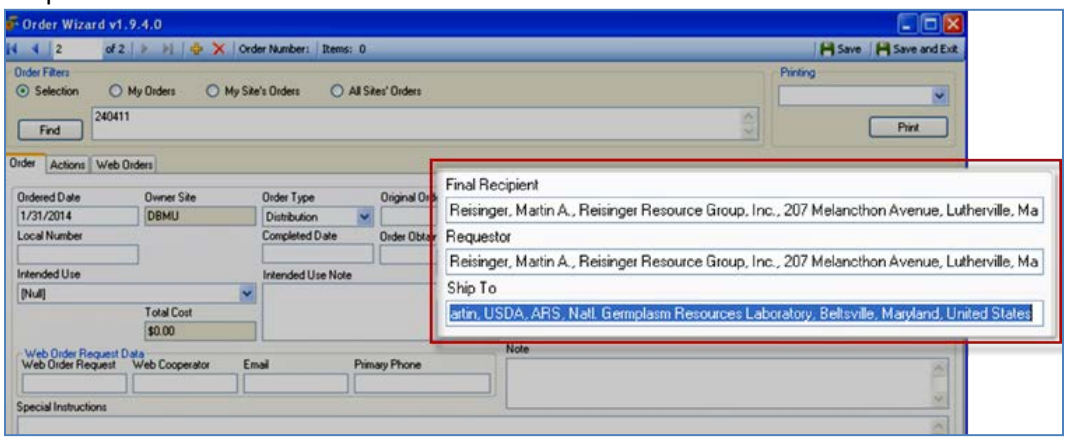


A blank **Final Destination** field is the result of answering **No** to the choice when prompted to create a new cooperator:



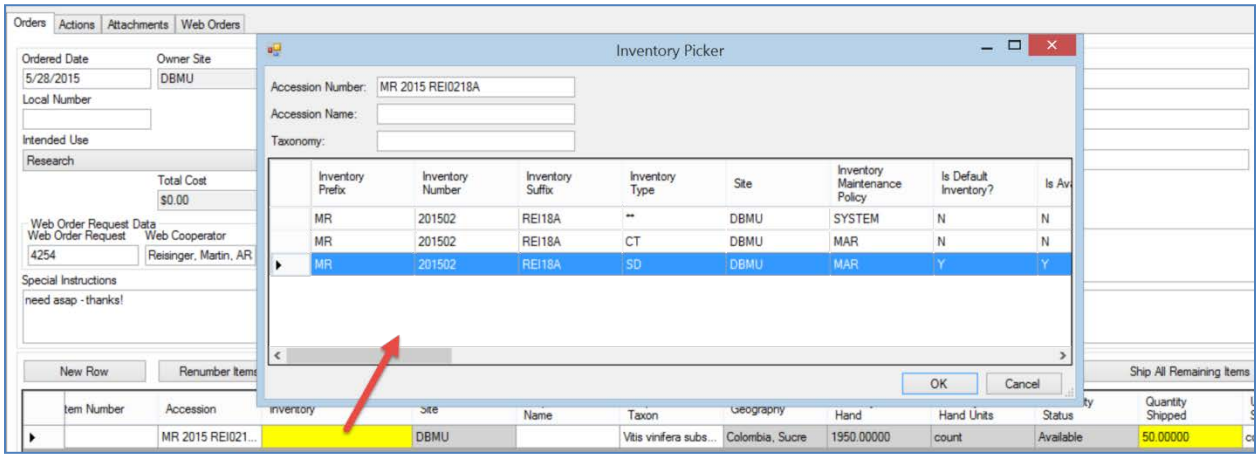
Note that **Final Destination** is a required field so it must be supplied to continue. When answering with **Yes**, a new cooperator record is created and the **Final Destination** information is filled in. The **Ordered by** and the **Ship To** fields are also filled in; these can be overridden if necessary with different

cooperator information:



Editing the Items in the Grid

If desired, the items in the grid may be edited – for example, you may select a different Inventory lot or a different quantity to be distributed. In this example, the person filling the order changed the **Quantity Shipped** and is in the process of selecting a different lot from the Inventory Picker window. (To display the window, double-click in the **Inventory** field in the grid.)



Using the Order Wizard to Create a New Order

The Order Wizard can be used to create new germplasm order requests that come to the genebank via emails, phone calls, or other means. (The wizard can also be used to manage any existing order, including adding additional items, regardless of how the order originated.)

Tip

When starting up the Curator Tool, the left tab in the list panel will be active and display the lists under that tab. Consider setting up your folder hierarchy under that left tab so that the lists help with tracking your orders by status or date received or some other criterion. Although not necessary, when working with orders in the Curator Tool, have the folder active in which you intend to use for pointing to orders. Also helpful but not required, in the right grid, you may want to select the **Get Order Request** dataview as your active dataview.

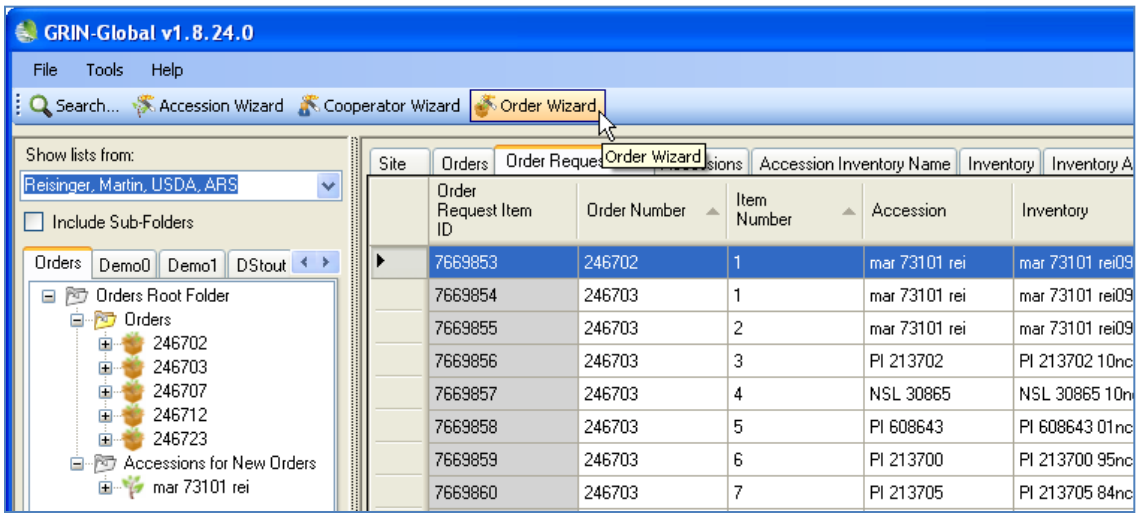
Tip

Save frequently, and save often! (when using the Order Wizard). Also, use the **Save** button when initially creating the order; otherwise you will receive an error message.

When an email comes into the site with an order specifying the accessions, these accessions can be dragged from the email into the Order Wizard grid and the Order Wizard will select the relevant inventory (but we are getting ahead of ourselves).

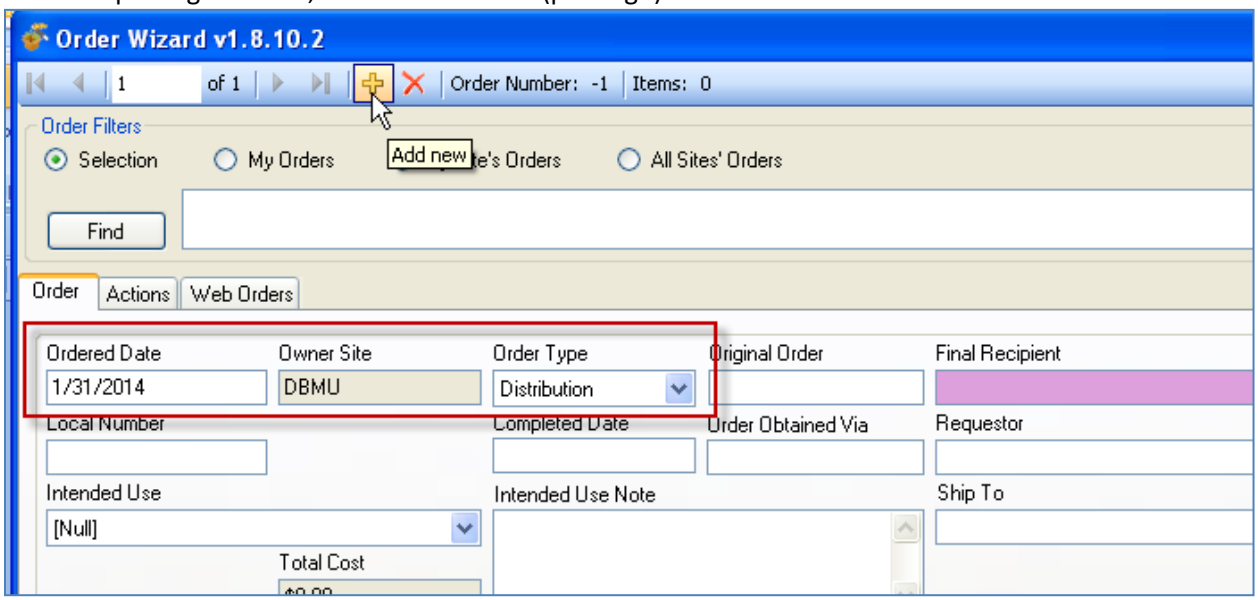
Step 1

Click on the **Order Wizard** button to start the wizard:



Step 2

On the top navigation bar, click the **Add new** (plus sign) button to create a new order:

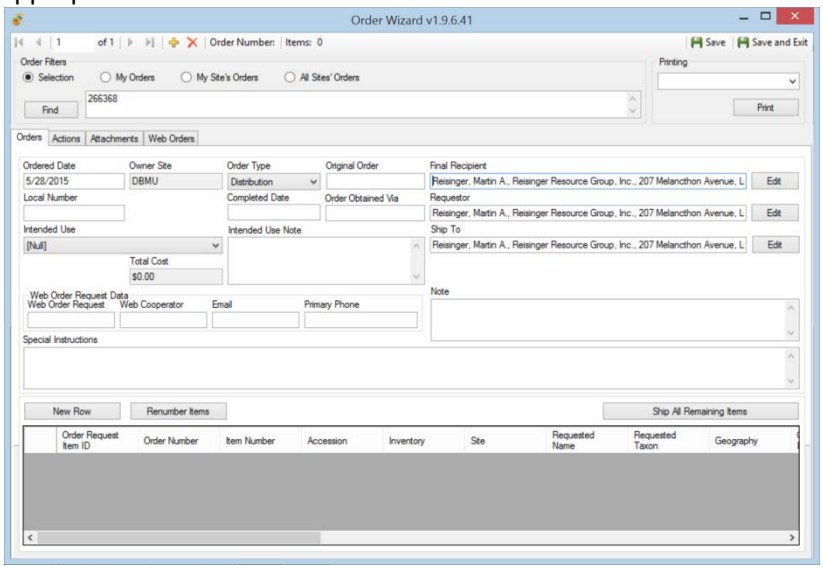


The wizard automatically fills in the:

- **Ordered Date** (with the current date)
- **Owner Site** (with your site code based on your Curator Tool User ID)
- **Order Type** (with the order type **Distribution**)

Step 3

Complete the **Final Recipient** field – click in the field and type the first few characters. When you click **OK**, the **Requester** and **Ship To** fields fill in automatically with the same cooperator. For orders where the **Ship To** or **Requester** fields need to be different, simply choose a different cooperator for the appropriate field.



Step 4

In the Order Wizard window, input the other fields, such as **Local Number**, **Special Instructions,** as needed.

Note

The **Original Number** field is blank for all new orders. It is used when an order is split. It refers to the order request key field of the original (or "parent") order primary key field number.

Step 5

There are multiple approaches that can be taken to assign inventory to the order. In the following sections, Step 5a through Step 5d, each approach will be described in further detail.

Refer to Step	Approach	Description
5a	Input an Accession key, an Accession Name, or a Taxon in the Order Wizard's inventory Picker window	Use this approach when you know the desired Accession ID, Name, or Taxon information. The wizard's Inventory Picker will accept any one of these three fields. If there is a match, you then decide and select which inventory to apply to the order.
5b	Drag either accession records or inventory records from the Search Tool grid	Dragging inventory records rather than accession records will perform somewhat better (when selecting accessions, the software must perform additional processing to select the inventory)
5c	Drag accession key(s) or inventory key(s) from a spreadsheet, Word doc, or an email	An *accession* key is comprised of three fields: Accession Prefix / Accession Number / Accession Suffix The wizard interprets an *inventory* key based on four fields: Inventory Prefix / Inventory Number / Inventory Suffix / Inventory Type
5d	Drag *accession* or *inventory* records from the Curator Tool	The wizard will find all the inventory related to the accession and will highlight the inventory that is available and ready for distribution.

Note

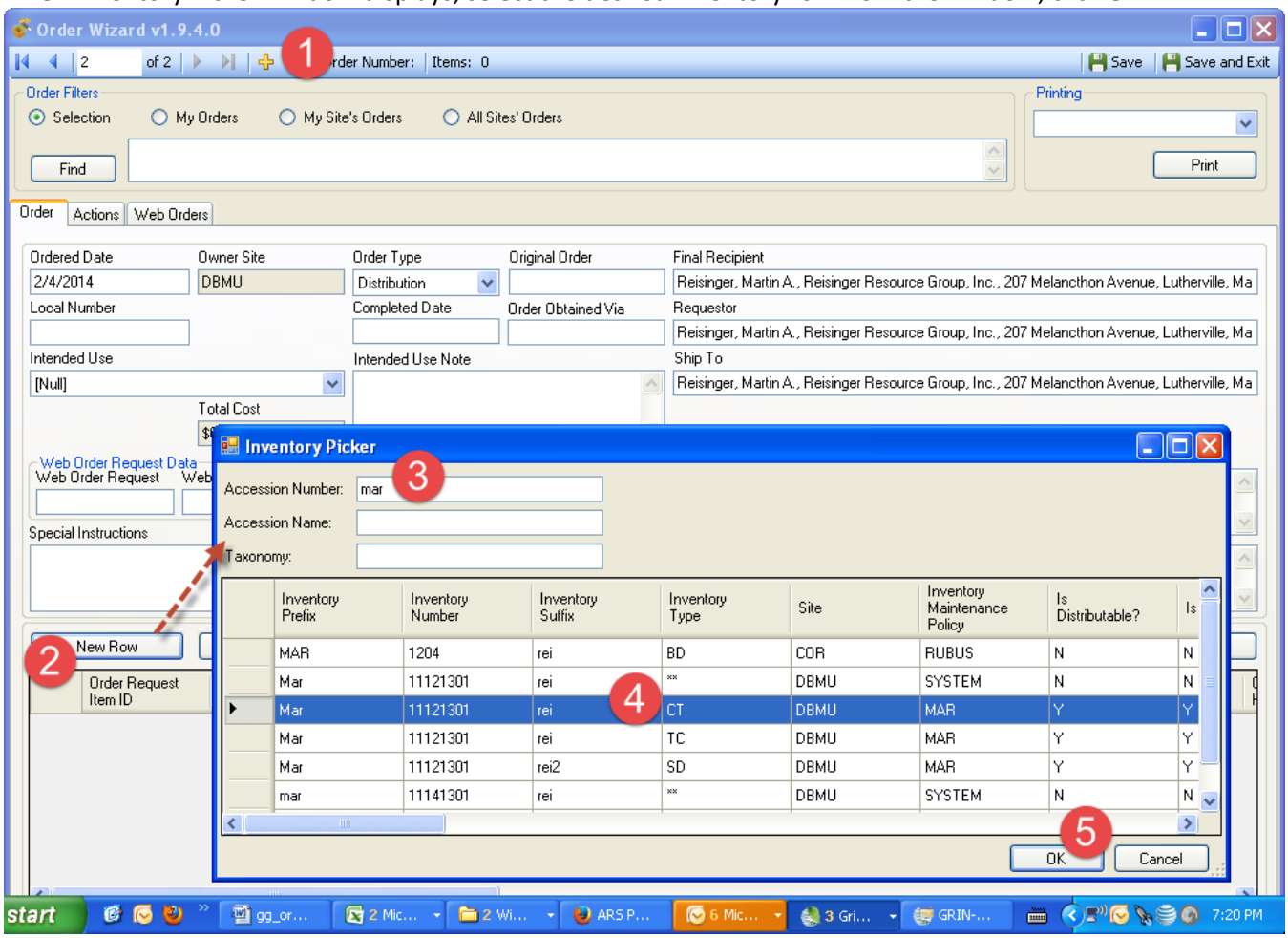
As of version 1.9.5, **Order Request Items** in the Order Wizard grid can be *copied (using Ctrl-C) into* a spreadsheet. At this time, you cannot paste **Order Request Items** *into* the OW grid.

Step 5a: Input an Accession key, an Accession Name, or a Taxon in the Order Wizard's Inventory Picker window

Use this approach when you know the **Accession Number**, **Accession Name**, or **Taxonomy** information. The wizard will display related inventory. You then decide and select which inventory to apply to the order.

One example when this approach is handy is when you need to change what inventory (lots) are needed – for example, for a regeneration order (most of the lots will not be the distribution lots since you are going back to original seed or a previous parental lot).

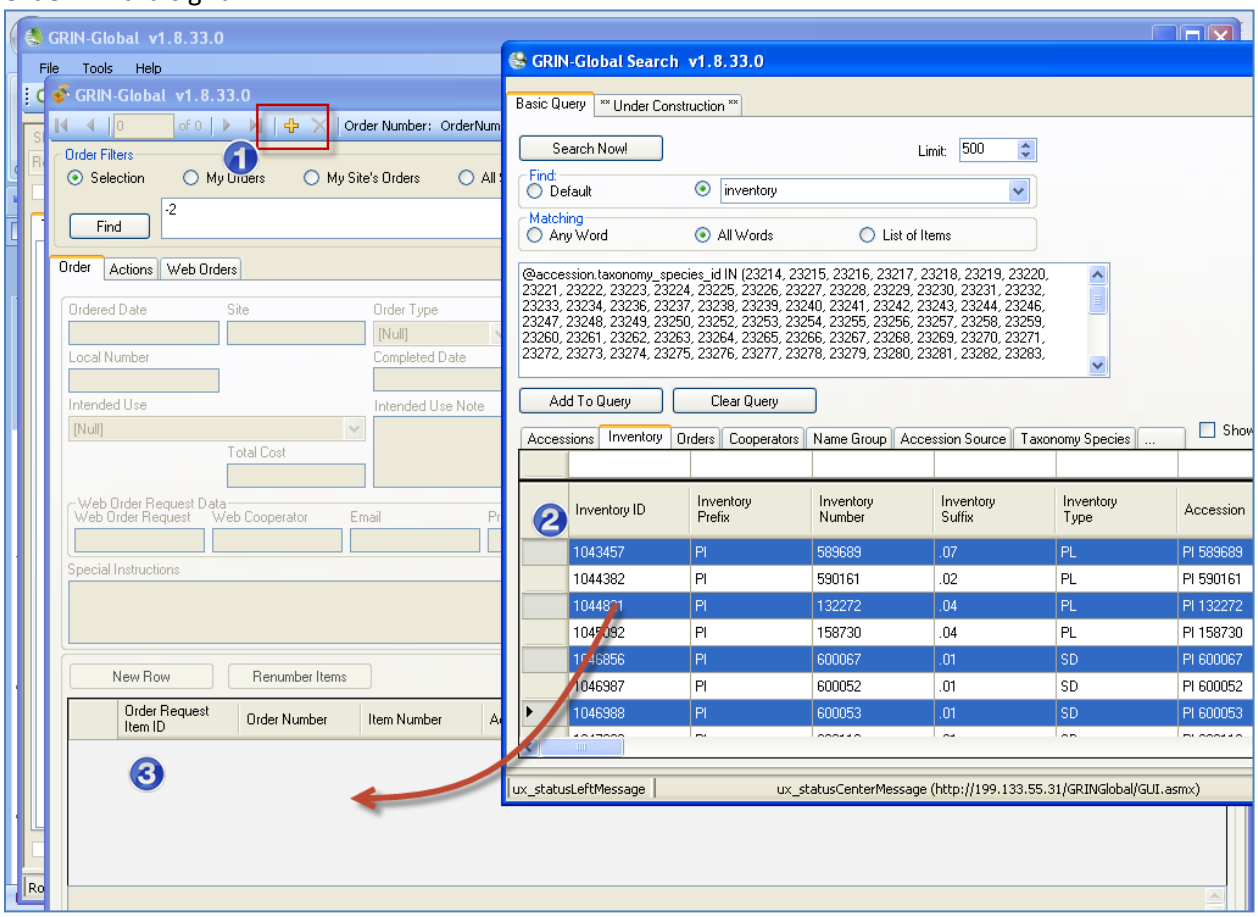
First click the **Add New** icon (the Plus Sign) icon; click the **New Row** icon; then paste the **Accession Number**, **Accession Name**, or **Taxonomy** into the respective field in the **Inventory Picker** window. When Inventory Picker window displays, select the desired inventory row from the window; click **OK**:



Step 5b: Dragging inventory or accession records from the Search Tool grid

Drag from the Search Tool grid, either accession records or inventory records.

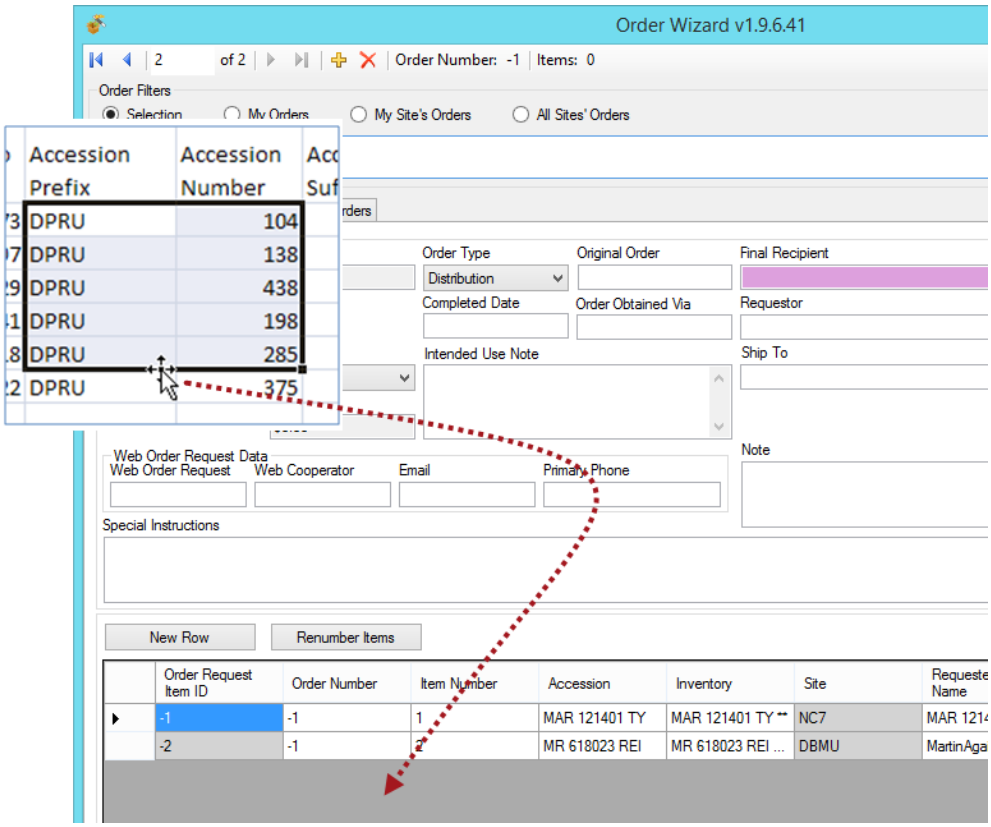
You can highlight records (inventory or accession) found in the Search Tool and drag them into the Order Wizard's grid:



Dragging inventory records rather than accession records will perform somewhat better because when selecting accessions, the software must perform additional processing to determine the inventory.

Step 5c: Dragging accession or inventory keys from a spreadsheet

If you have one or more accession or inventory keys, you can drag them from a spreadsheet, Word doc, or an email message into the grid area on the Order Wizard. The Order Wizard is capable of using the three fields of an accession key (accession_prefix, accession_number, and accession_suffix or the four fields of an inventory key (inventory_prefix, inventory_number, inventory_suffix, and inventory_type.



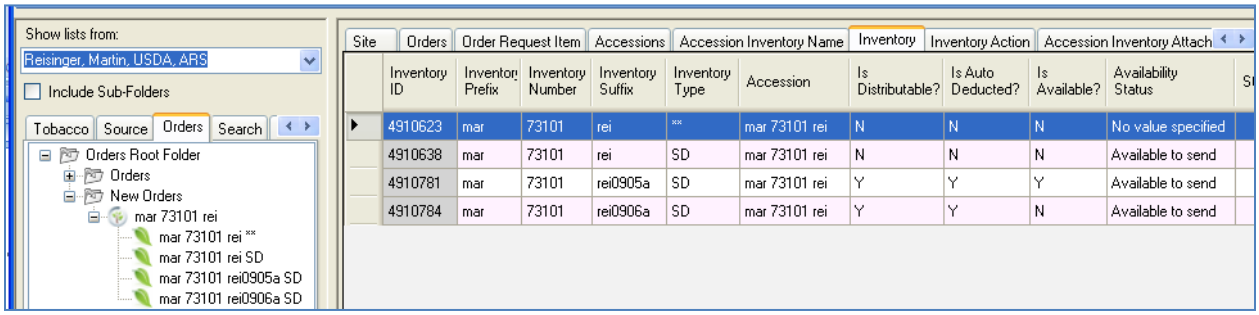
Unlike other CT drag & drop operations, *do not include any column headings*. The Order Wizard will assume that if three columns are used, the data are accessions (prefix, number, and suffix), whereas when four columns are dragged, the fourth column is the type and thus the records being added are inventory records.

Step 5d: Dragging accession or inventory records from the Curator Tool

You can select Accession or Inventory records from the CT, and then drag them into the Order Wizard grid. When dragging accession records, the program automatically chooses the best inventory to fill the order request (based on a set of programmed business rules – see the online Inventory document for complete details) and adds the appropriate inventory to the order.

When coming from the CT, remember to drag the record from the grid, not the item from the list in the left panel. Do not include the column headings; drag only the records (rows).

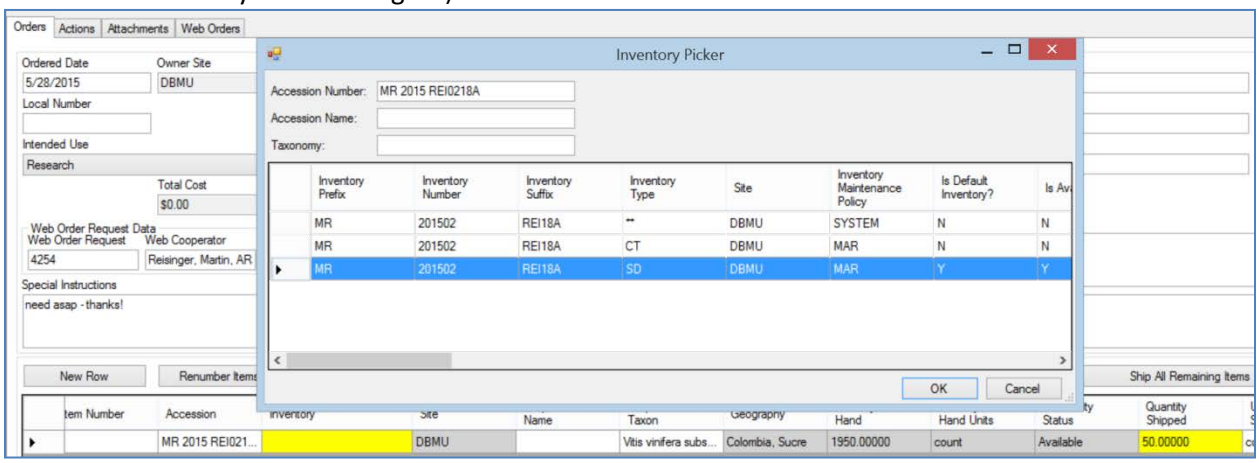
In the following example, if the user dragged the accession record to the Order Wizard grid, which inventory would the wizard choose to use, since three of the four inventory records have a status of **Available to send**?



Answer: **inventory mar 73101 rei0905a SD** -- Why? Of the four inventory records, this is the only inventory record whose fields **Is Distributable?** and **Is Available?** are both set to **"Y."**

Editing Items in the Grid

If desired, the items in the grid may be edited – for example, you may select a different Inventory lot or quantity to be distributed. In this example, the order filler changed the **Quantity Shipped** and is in the process of selecting a different lot from the Inventory Picker window. (To display the window, double-click in the Inventory field in the grid.)



Actions (Order Actions)

Step 6: Include Order Actions

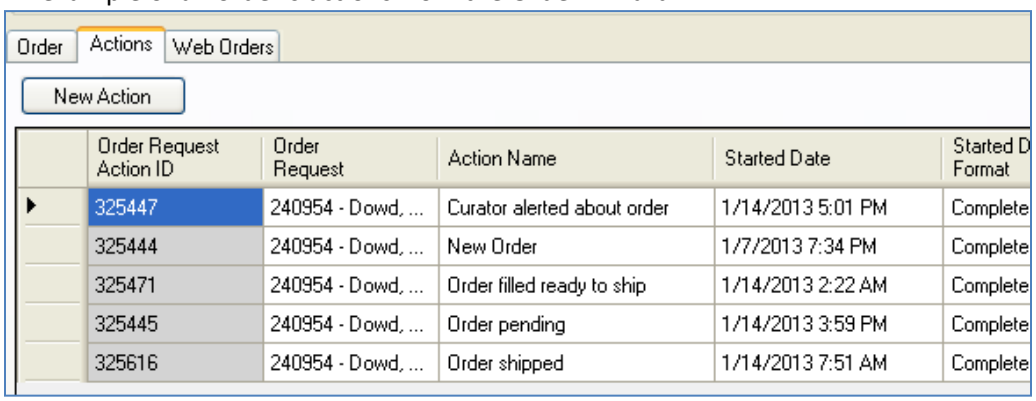
Use the Order Wizard **Actions** tab to add any appropriate actions.

Many actions may be applied to an order request; essentially an action indicates that some event related to the order has occurred. For example, a **New Order** action is automatically generated when the web order is converted to a standard order. Similarly, an action of **Order Shipped** is automatically generated when an order is shipped.

Order Actions are used to document the processing and current status of the order. Each organization and the sites within organizations will follow their own unique standard operating procedures in completing workflows – the action records are a means for documenting the steps in the workflow.

Action Code	Title
NEW	New Order
PENDING	Order pending
APHISASKED	Export requirements requested
CURALERTED	Curator alerted about order
CURCLEARED	Curator cleared an order
PATHSEED	Path test needed and sent
PATHPASSED	Pathologist approved the order
ORDFILLED	Order filled ready to ship
APHIS	Order sent to APHIS (Inspection)

An example of an order's actions from the Order Wizard:



Order Request Action ID	Order Request	Action Name	Started Date	Started D Format
325447	240954 - Dowd, ...	Curator alerted about order	1/14/2013 5:01 PM	Complete
325444	240954 - Dowd, ...	New Order	1/7/2013 7:34 PM	Complete
325471	240954 - Dowd, ...	Order filled ready to ship	1/14/2013 2:22 AM	Complete
325445	240954 - Dowd, ...	Order pending	1/14/2013 3:59 PM	Complete
325616	240954 - Dowd, ...	Order shipped	1/14/2013 7:51 AM	Complete

The action codes are stored in the **ORDER_REQUEST_ACTION** code group which is maintained by the GRIN-Global administrator. The following partial screen is from the GG Admin Tool:

Group Name: ORDER_REQUEST_ACTION

Values (29) | Referenced By (2 / 1)

Language: English

Value	Title	Description	Last Tou
APHIS	Order sent to APHIS		10/5/201
APHISASKED	Export requirements requested		10/5/201
CANCEL	Cancel or abort order		10/5/201
CURALERTED	Curator alerted about order		10/5/201
CURATOR	Order Status		4/30/201
CURCLEARED	Curator cleared an order		10/5/201
CURWAIPROP	Order waiting for IP expiration		10/5/201
CURWAREGEN	Order waiting for regeneration		10/5/201
DONE	Completed in-house order		10/5/201
ESSREQUEST	Endangered Species Statement requirement		10/5/201
FORWARD	Forward order to another site		10/5/201

Since only a GG administrator can add Codes, contact the administrator if additional codes are needed.

Tracking Expenses

If desired, you can assign expenses with an action. The Order Wizard will tabulate the total expense associated with the order's cumulative actions:

Order | Actions | Web Orders

New Action

Order Request	Action Name	Started Date	Started Date Format	Action Information	Completed Date	Completed Date Format	Action Cost	Cooperator
240411 - Pollard, ...	Curator alerted about order	1/17/2013 3:26 ...	Complete date		1/17/2013	Complete date		Stebbins, Robert
240411 - Pollard, ...	Curator cleared an order	1/17/2013 12:01...	Complete date		1/17/2013	Complete date		Reitsma, Kathlee
240411 - Pollard, ...	Curator cleared an order	1/17/2013 9:26 ...	Complete date		1/17/2013	Complete date		Millard, Mark J.,
240411 - Pollard, ...	Curator cleared an order	1/17/2013 5:22 ...	Complete date		1/17/2013	Complete date		Brenner, David,
240411 - Pollard, ...	New Order	12/30/2012 9:07...	Complete date		1/2/2013	Complete date		Stebbins, Robert
240411 - Pollard, ...	Order filled ready to ship	1/18/2013 10:53...	Complete date		1/18/2013	Complete date		Pfiffner, Lisa, US
240411 - Pollard, ...	Order pending	1/2/2013 8:21 AM	Complete date		1/2/2013	Complete date		Stebbins, Robert
240411 - Pollard, ...	Requestor solicited for addional i...	1/2/2013 4:47 AM	Complete date		1/2/2013	Complete date		Stebbins, Robert
240411 - Pollard, ...	Order shipped	1/18/2013 1:39 ...	Complete date		1/18/2013	Complete date		Stebbins, Robert
240411 - Pollard, ...	Order sent to APHIS	1/31/2014	[Null]		1/31/2014	[Null]	75.00	Reisinger, Emma
240411 - Pollard, ...	Order filled ready to ship	1/31/2014	[Null]			[Null]	28.00	

Order | Actions | Web Orders

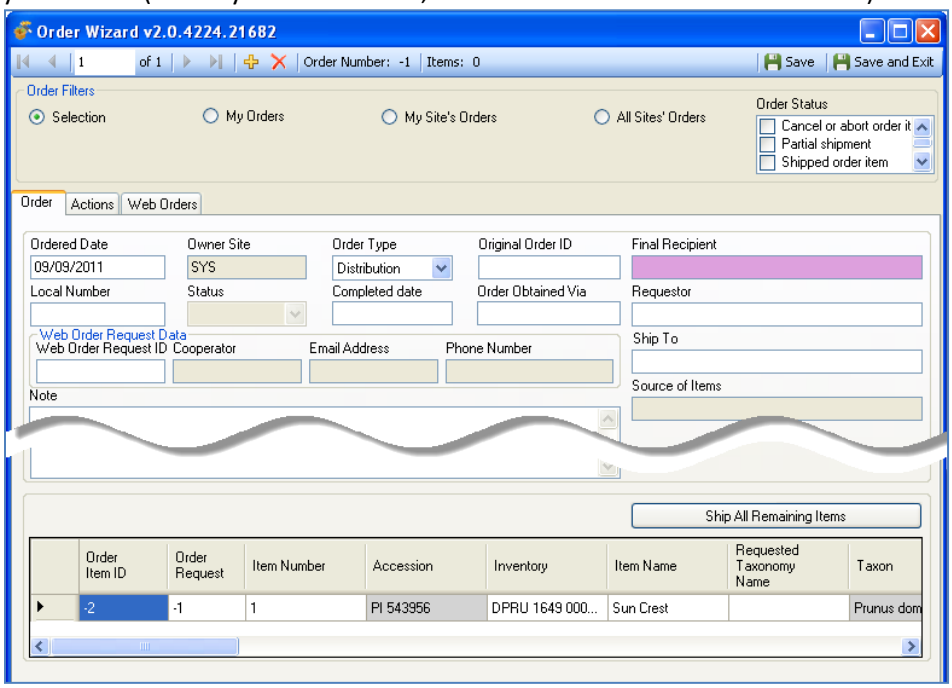
Ordered Date: 1/2/2013 12:00:00 AM
Owner Site: NC7
Order Type: Non-research, non-
Original Order: 240411 - Pollard, Tyler,
Final Recipient: Pollard, Tyler, , 11770 El Camara Drive,
Local Number: 20122214
Completed Date: 1/18/2013 12:00:00 A
Order Obtained Via: PUBLIC
Requestor: Pollard, Tyler, , 11770 El Camara Drive,
Intended Use: [Null]
Intended Use Note:
Ship To: Pollard, Tyler, , 11770 El Camara Drive,
Total Cost: $103.00
Note: NRR letter sent.

Web Order Request Data
Web Order Request | Web Cooperator | Email | Primary Phone

Save

Step 7

While working within the Order Wizard, we recommend periodically clicking the **Save** button to save your order. (When you are finished, click on the or **Save and Exit** button.)



Step 8

Drag more inventory or accession records as needed to build the order items.

Item Status Codes

Step 9

In the Order Wizard grid, each item that has been requested for the order is listed. Each item has its own status. (These status codes are stored in the Code Group **ORDER_REQUEST_ITEM_STATUS**. The GG administrator can modify these codes to match the codes to the organization's needs.)

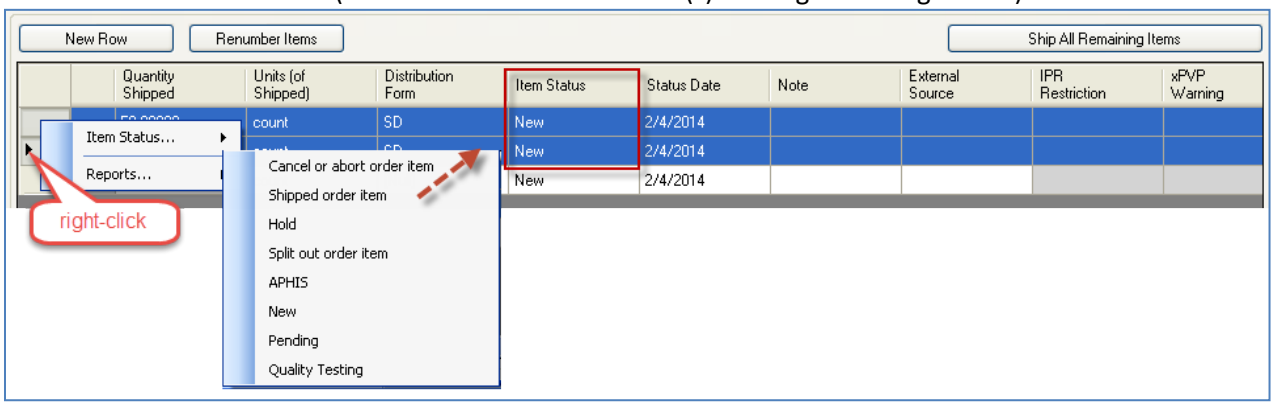
Order Item Status Codes:

Value	Title	Description
CANCEL	Cancel or abort order item	
HOLD	Hold	Hold item (long term)
INSPECT	APHIS	
NEW	New	
PENDING	Pending	
QUALITYTEST	Quality Testing	
SHIPPED	Shipped order item	
SPLIT	Split out order item	

For all items in the grid, when the status is **NEW** or **PENDING** in the **Item Status** column, clicking on the **Ship All Remaining Items** button will change the status to **SHIPPED**.

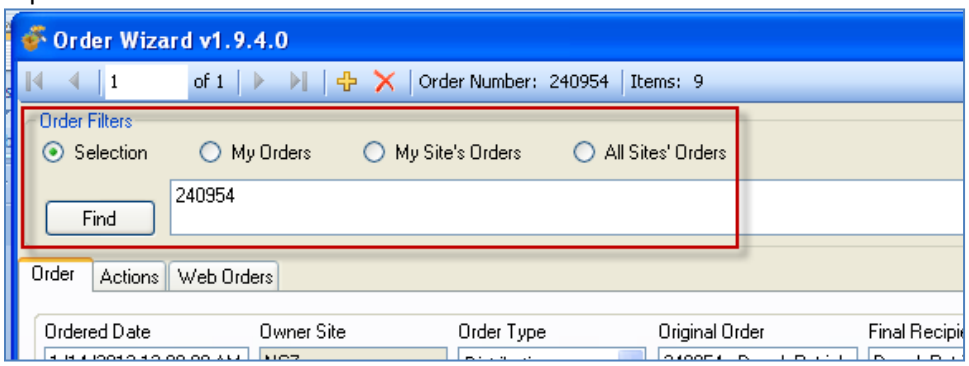
Whenever the status is something other than **NEW** or **PENDING**, the **Ship All Remaining Items** button has no effect.

To change the status of one or more items in the grid, right click on the item(s) and then select a status from the **Item Status** menu (or select the **Item Status** cell(s) in the grid and right click):



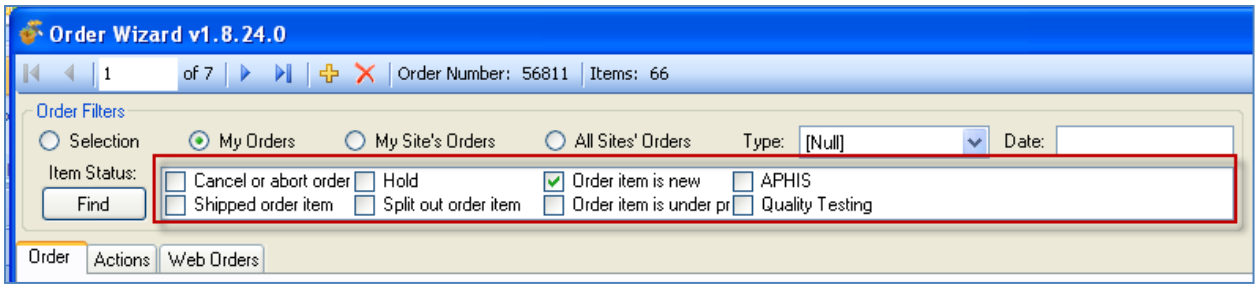
Finding Existing Orders with the Order Wizard

The Order Wizard can be used to find existing orders for review or additional processing. Start the Order Wizard and input or paste the order number in the text box next to the **Find** button; click **Find**. Multiple order numbers can also be inputted or copied into the box. Other methods for finding specific orders are explained below.



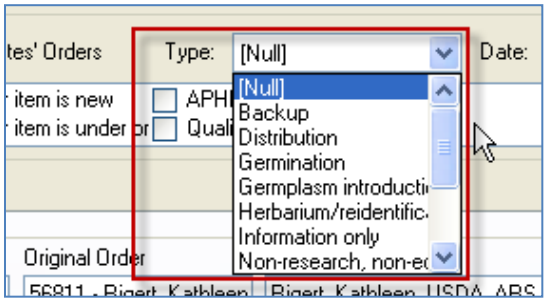
Radio Buttons: My Orders, My Site's Orders, and All Site's Orders

You can also use the relevant radio button to filter the orders. When any of these buttons are used, the **Find** box is filled with various Order *Item status* checkboxes:



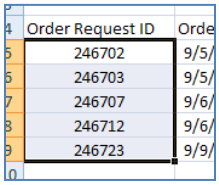
Type and Date Filters

You can filter for a specific order type or date; here the user is selecting a **Type**:



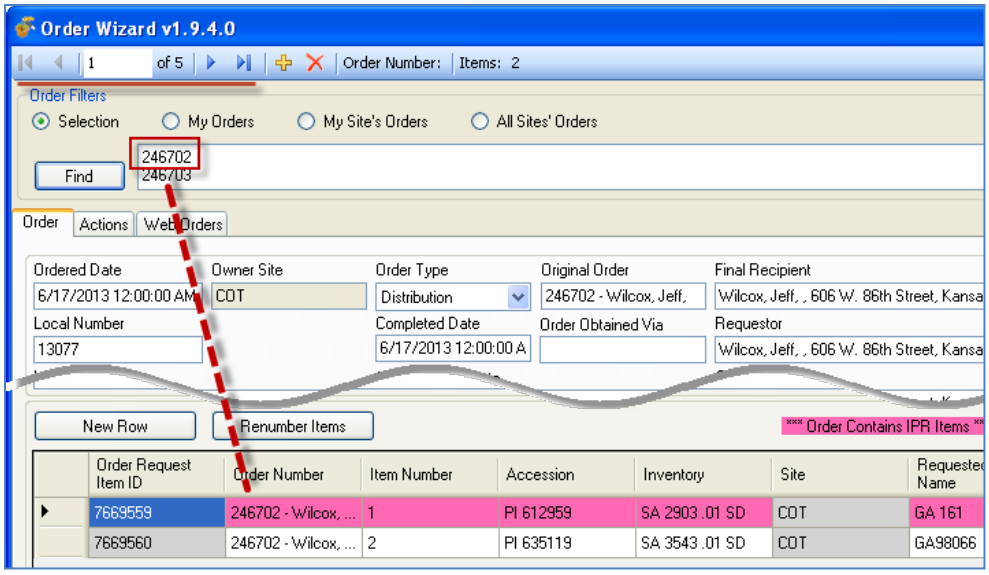
Copying Existing Order Numbers into the Order Wizard

You can search for multiple orders by dropping a list of order numbers into the Find box. In this example, five cells containing order request numbers were copied from Excel.



Order Request ID	Orde
246702	9/5/
246703	9/5/
246707	9/6/
246712	9/6/
246723	9/9/

Observe the navigation bar at the top. Notice that record **1** of **5** is currently displayed. The first number in the Excel list was 246702 – the wizard is displaying the first found record. Using the navigation bar to move through the records will show that five order records were found.



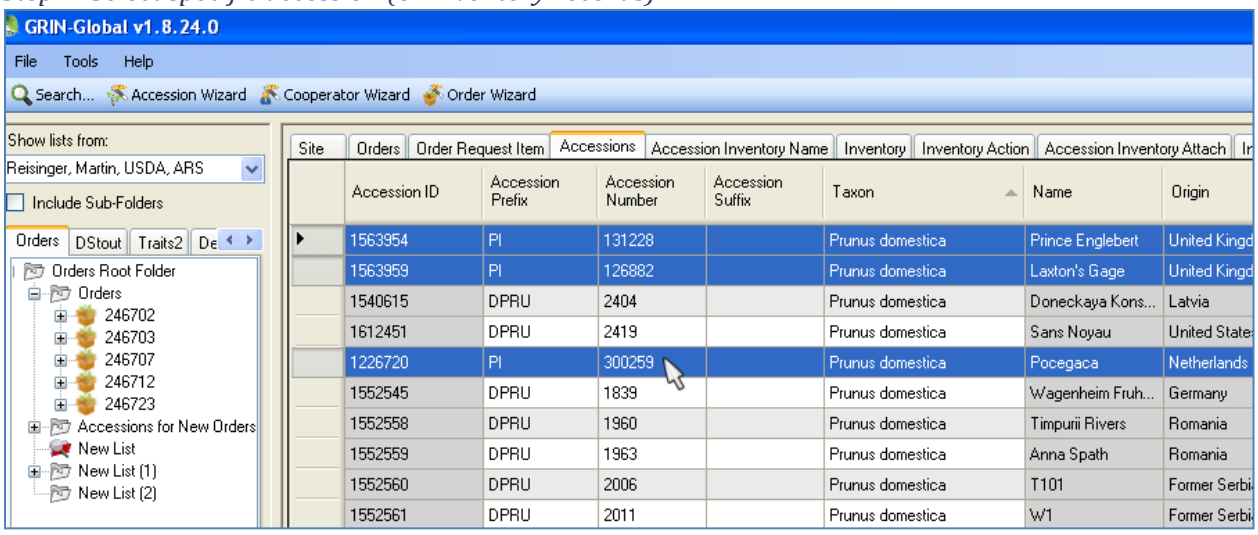
Finding Web Orders

Beginning with Curator Tool version 1.9.4, the **Web Order** tab has a similar Find functionality as the **Order** tab. The Web Order Find searches the status of the Web Orders; in the Order Find, the search is against the Order Item Statues data.

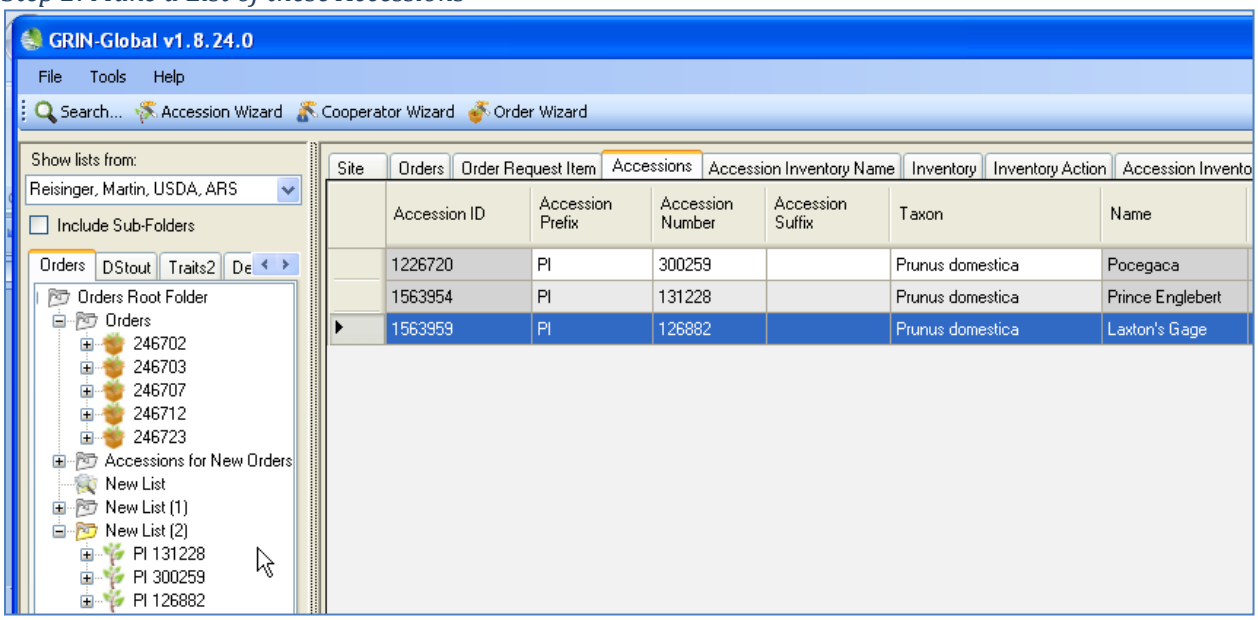
Selecting Records before Starting the Order Wizard

The Order Wizard can be launched and used to display order details about selected Order Request records. Typically, before starting the Order Wizard, you may be viewing data in the Accession or Inventory dataviews. In order to see their related orders in the Order Wizard, consider creating a list of orders from the selected accessions or inventory records. In other words, you must have the **Order Request** dataview active to display orders in the Order Wizard.

Step 1: Select specific accession (or inventory records)

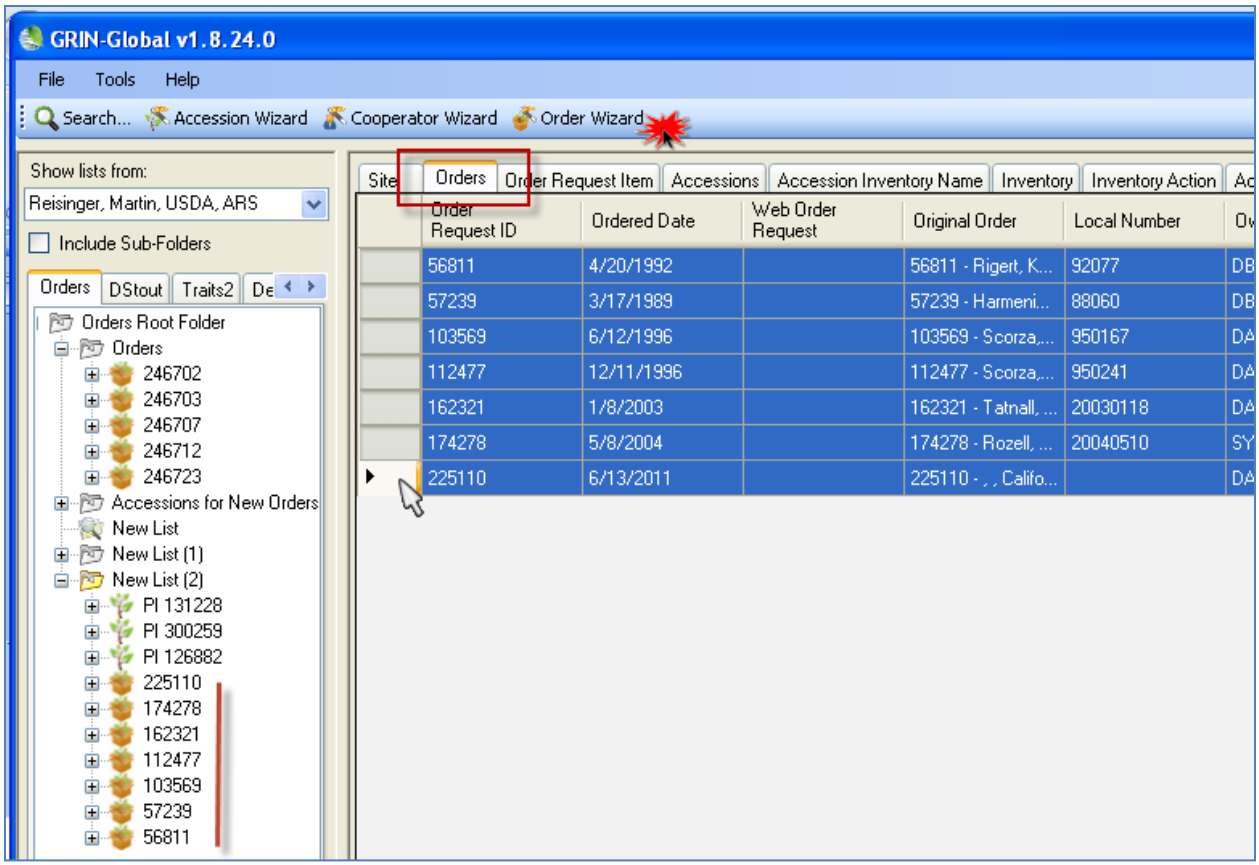


Step 2: Make a List of these Accessions



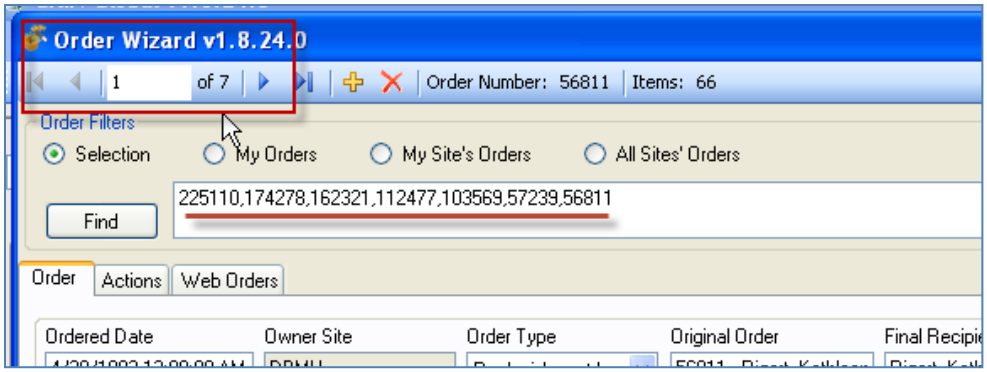
Step 3: Open the Order Request dataview

One option in this step is to consider creating a list of the orders. In any case, highlight the orders (build an order list if desired), and then click the Order Wizard button...



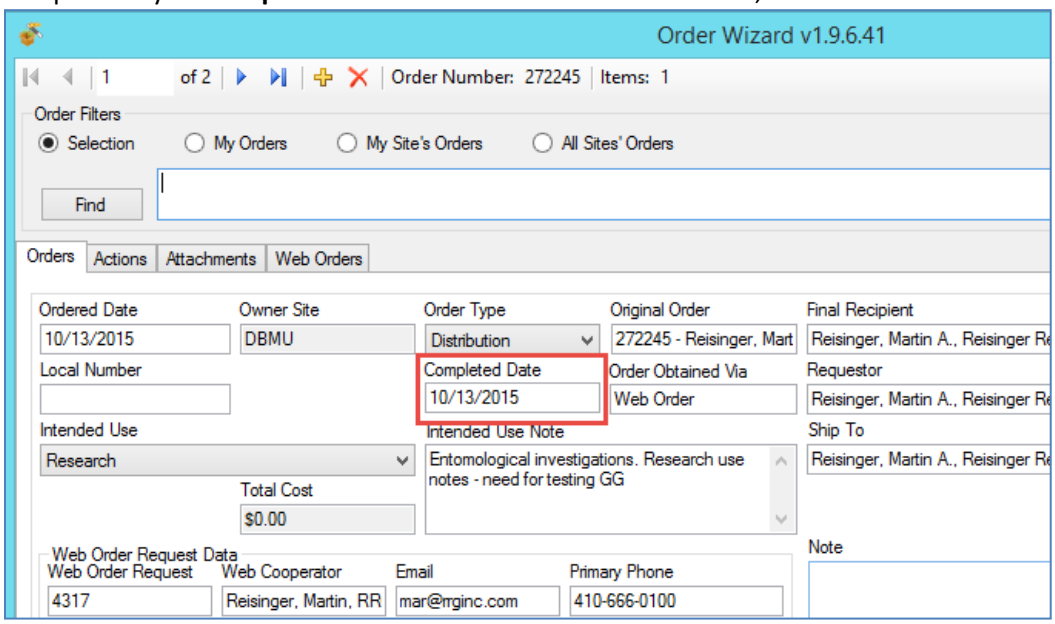
Resulting Order Wizard Window (when multiple orders have been selected):

The Order Wizard displays the first order. The remaining orders can be displayed by using the navigation bar to move among the orders.

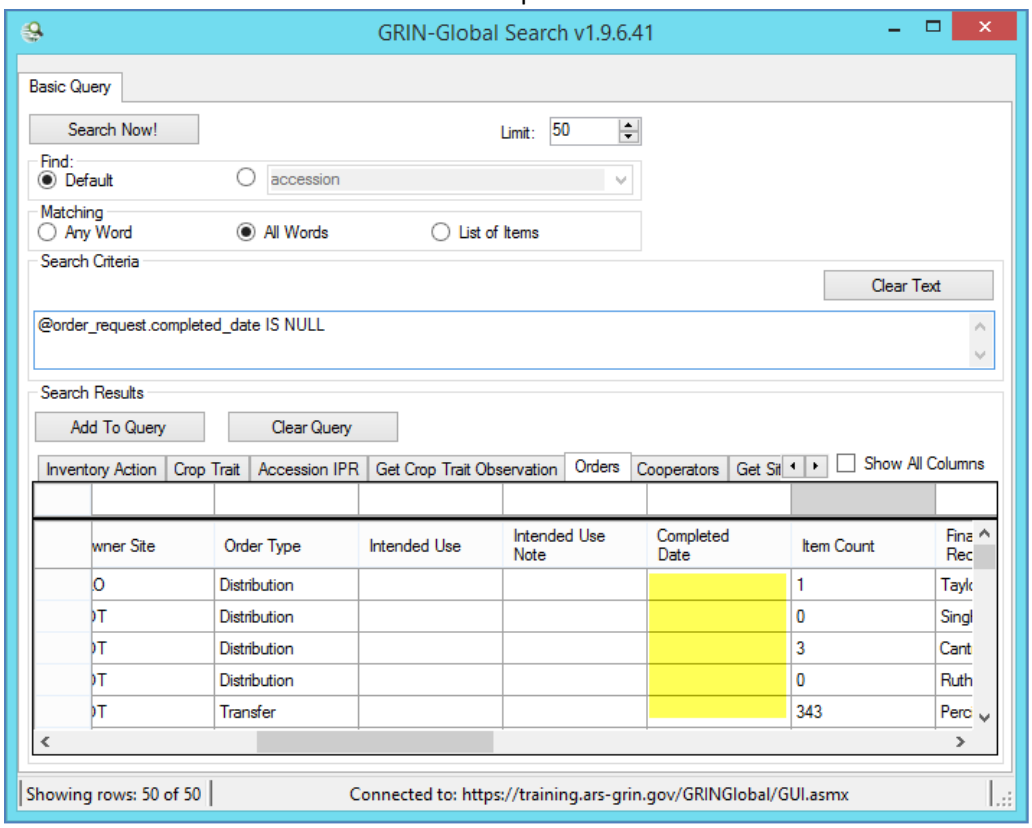


Finding Order Records Using the Search Tool

Currently the Order Record does not have a Status Code field. However, you can determine if an order is completed by its **Completed Date** field – when the date is filled, the order has been completed.



A search for orders that have not been completed:

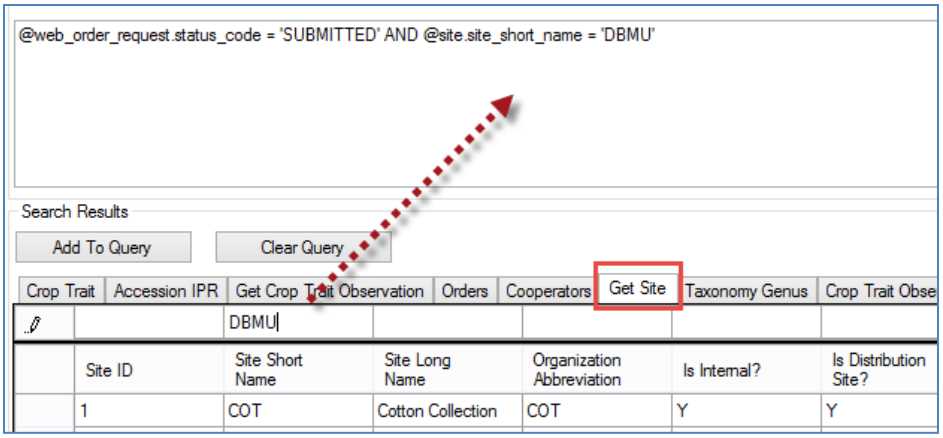


Create a Running (Dynamic) List of *Web* Orders for Your Site that are Still "New"

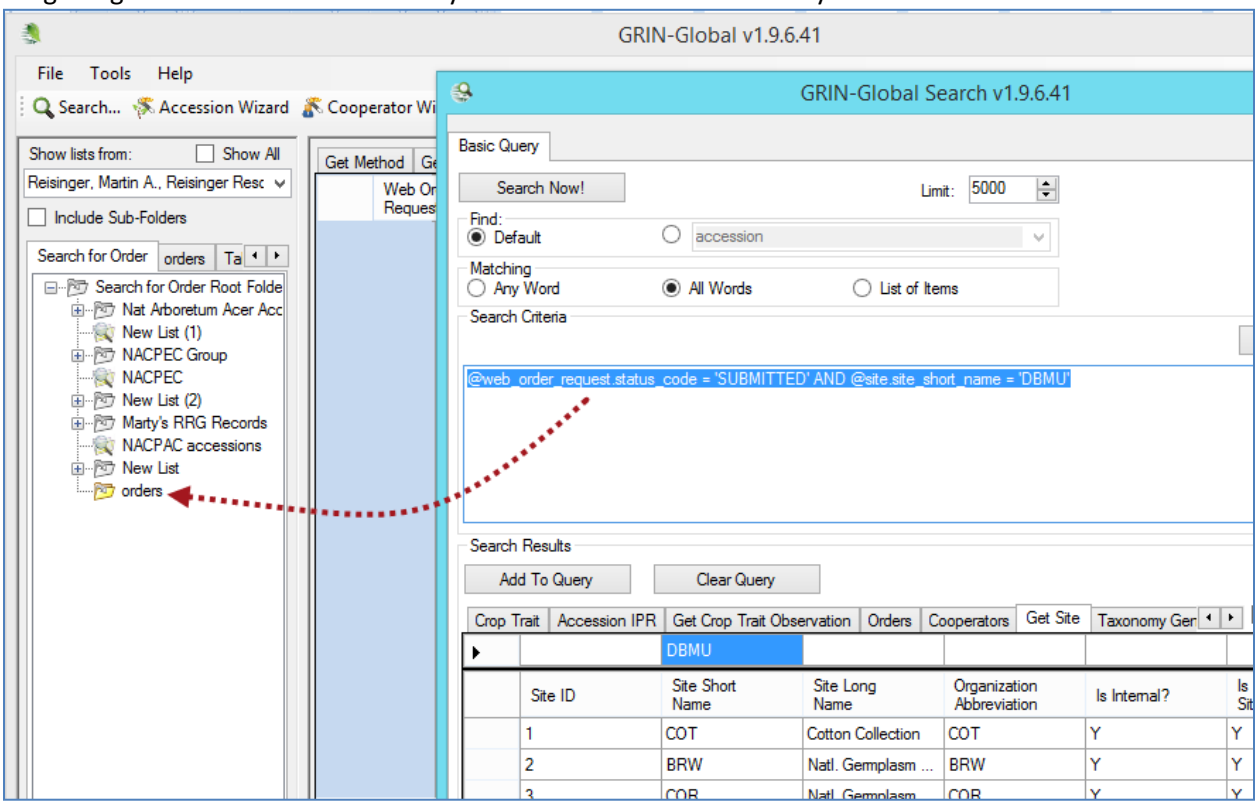
1. In the Search Tool, open the **Get Web Order Request** dataview

2. Select "New Order" for the **Status**

3. From the **Get Site** dataview, input your site's **Site Short Name** code and add that code to the query:



4. Drag the generated search criteria to your Curator Tool to create a dynamic folder.



Finding Orders (if created) & Web Orders & Item Status

The following SQL can be modified and used in the **Tools | Web Query** option to list your site's orders and web orders.

SELECT wor.web_order_request_id, o.order_request_id, wor.ordered_date, wu.user_name, wc.first_name, wc.last_name, tg.genus_name, s.site_short_name, ori.status_code, count(*) AS items

FROM web_order_request wor

INNER JOIN web_cooperator wc ON wor.web_cooperator_id = wc.web_cooperator_id

INNER JOIN web_user wu ON wor.created_by = wu.web_user_id

INNER JOIN web_order_request_item wori ON wor.web_order_request_id = wori.web_order_request_id

INNER JOIN accession a ON wori.accession_id = a.accession_id

INNER JOIN cooperator c ON a.owned_by = c.cooperator_id

INNER JOIN site s on c.site_id = s.site_id

INNER JOIN taxonomy_species ts ON a.taxonomy_species_id = ts.taxonomy_species_id

INNER JOIN taxonomy_genus tg ON ts.taxonomy_genus_id = tg.taxonomy_genus_id

LEFT JOIN order_request o ON wor.web_order_request_id = o.web_order_request_id

Left JOIN order_request_item ori ON o.order_request_id = ori.order_request_id

AND ori.inventory_id IN (SELECT inventory_id FROM inventory WHERE accession_id = a.accession_id)

WHERE wor.ordered_date > **'2016-01-01'**

AND

s.site_short_name = **'DBMU'**

GROUP BY wor.web_order_request_id, o.order_request_id, wor.ordered_date, wu.user_name, wc.first_name, wc.last_name, tg.genus_name, ori.status_code, s.site_short_name

(Sample results of the query shown on the next page.)

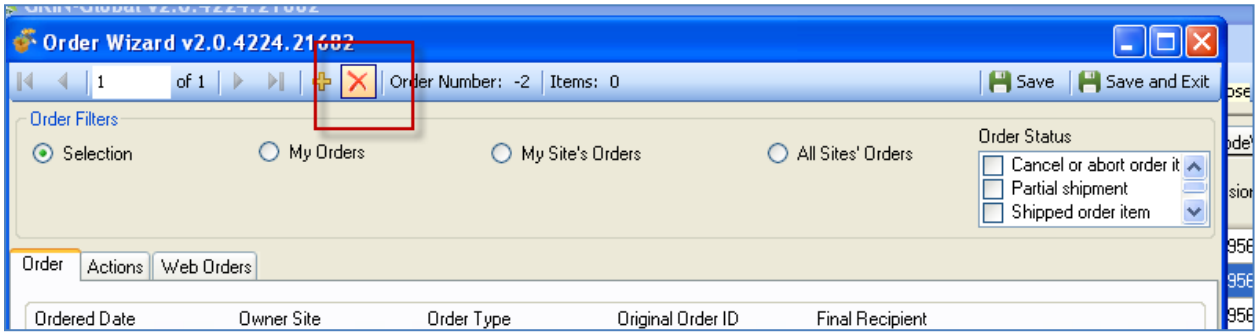
Execute SQL | Download Current Page | Download All Rows | Retrieved 10 rows.

web_order_request_id	order_request_id	ordered_date	user_name	first_name	last_name	genus_name	site_short_name	status_code	items
5365	274322	1/11/2016 6:04:18 PM	mar@rrginc.com	Martin	Reisinger	Humulus	DBMU	SHIPPED	1
5367	274324	1/13/2016 8:08:04 PM	mar@rrginc.com	Martin	Reisinger	Humulus	DBMU	SHIPPED	1
5367	274324	1/13/2016 8:08:04 PM	mar@rrginc.com	Martin	Reisinger	Vaccinium	DBMU	SHIPPED	1
5368	274325	1/21/2016 2:47:06 PM	mar@rrginc.com	Martin	Reisinger	Humulus	DBMU	CANCEL	1
5368	274328	1/21/2016 2:47:06 PM	mar@rrginc.com	Martin	Reisinger	Humulus	DBMU	CANCEL	1
5369	274326	1/22/2016 2:43:33 PM	mar@rrginc.com	Martin	Reisinger	Humulus	DBMU	SHIPPED	1
5370	274329	1/26/2016 5:35:41 PM	mar@rrginc.com	Martin	Reisinger	Humulus	DBMU	NEW	1
5371		1/26/2016 7:05:56 PM	mar@rrginc.com	Martin	Reisinger	Humulus	DBMU		1
5372		1/26/2016 10:06:59 PM	jbreidy@lari.gov.lb	Joelle	Braidy	Vaccinium	DBMU		1
5375		2/18/2016 3:39:04 PM	mar@rrginc.com	Martin	Reisinger	Humulus	DBMU		1

Deleting Order Records and Order Items in the Wizard

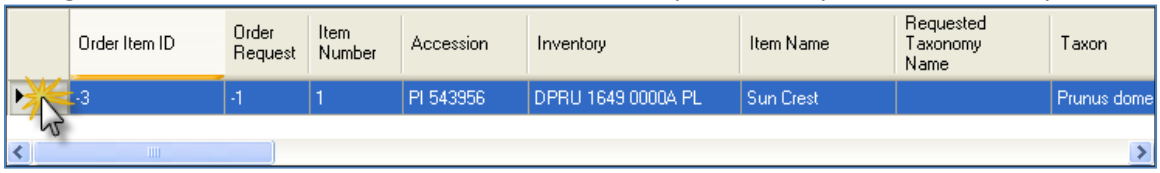
Deleting an Order *Record*

Click the delete button on the record's navigation bar to delete the current order record:

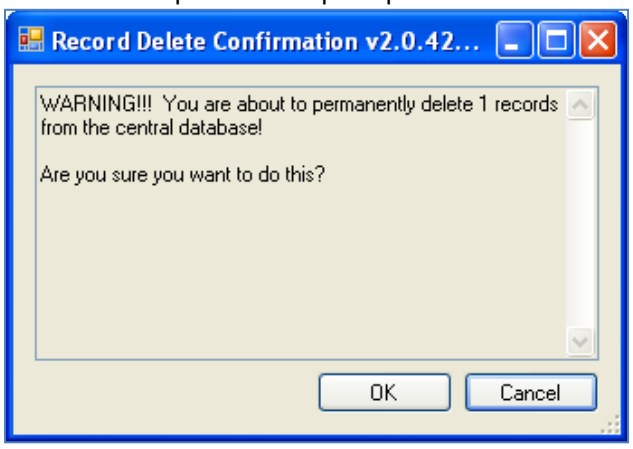


Deleting an Order *Item*

If you need to delete an order item, select the item's row (click on the left row header cell) in the order item grid at the bottom of the wizard window, and then press the keyboard's **Delete** key.

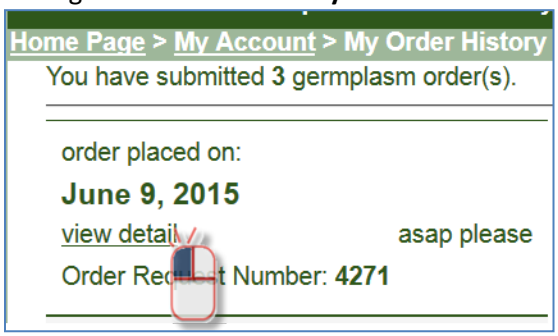


Click **OK** to respond to the prompt:

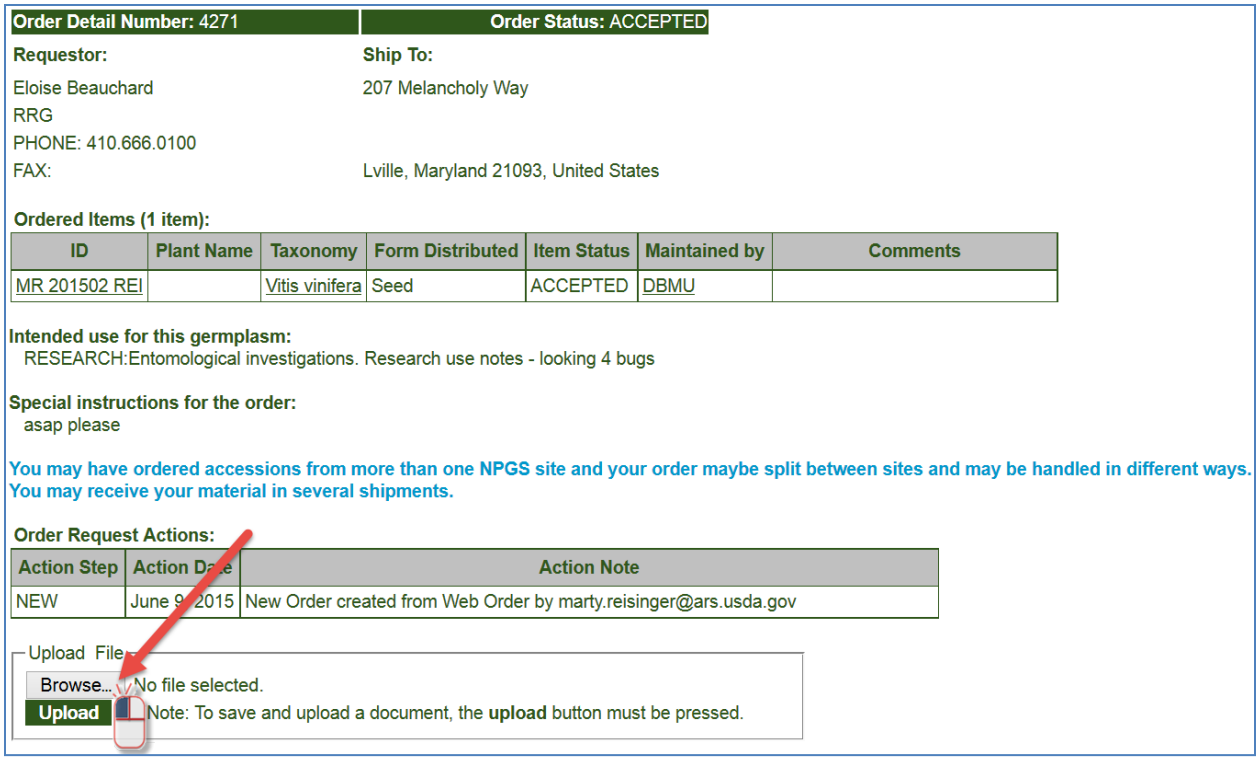


Attachments

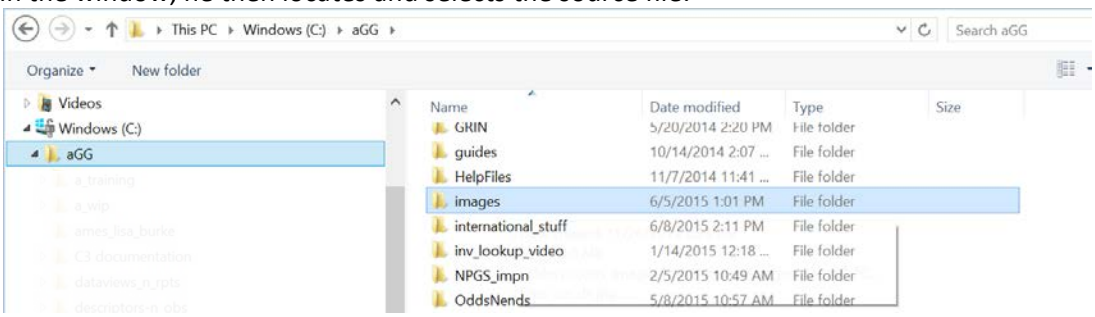
Attachment files can be submitted by the germplasm requester *after* he submits his order. To do so, he must go to his **Order History** and click on the order's **view detail** link:



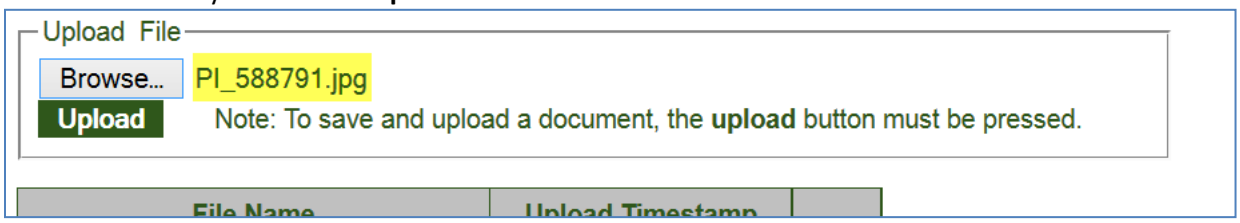
To upload a file, the requester must first click on the **Browse…** button:



In the window, he then locates and selects the source file:

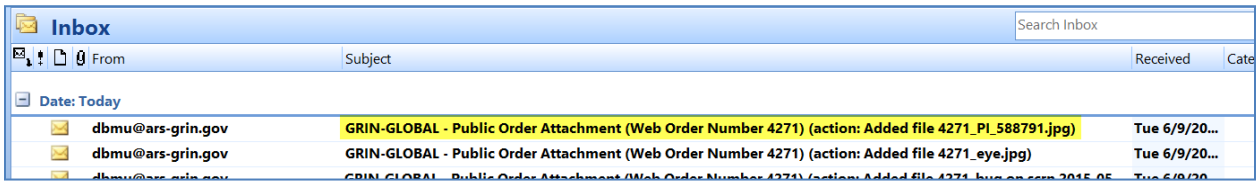


and will ultimately click on the **Upload** button to load the file:

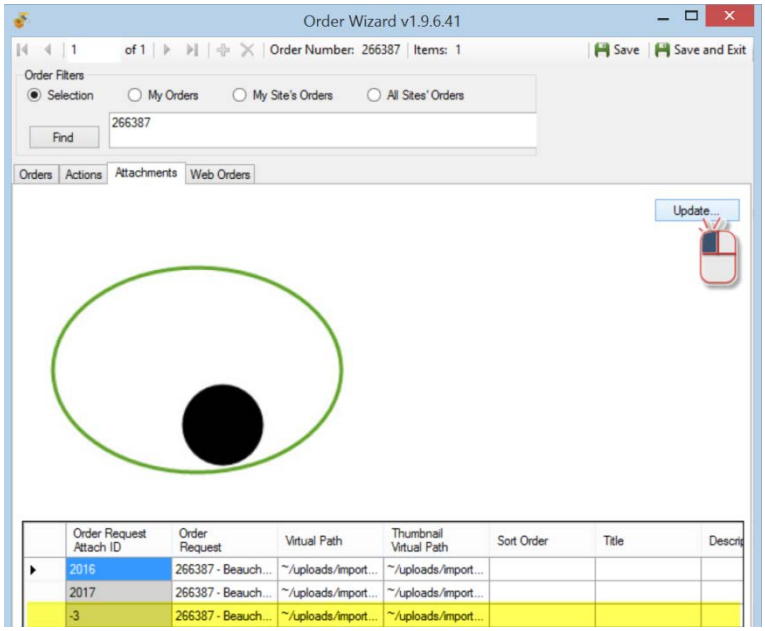


The requester can continue to upload additional files until the order has been shipped.

Whenever an attachment has been added, the genebank receives an email indicating that the order has had an attachment added:

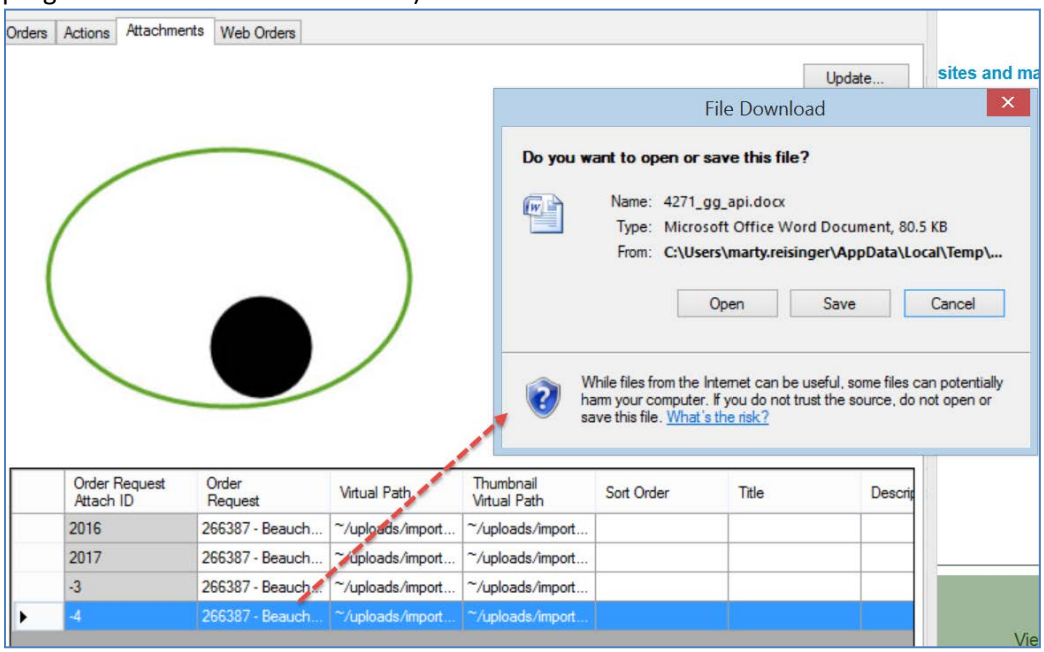


Within the CT's Order Wizard, the genebank person filling the order needs to click the **Update** button on the **Attachments** tab:



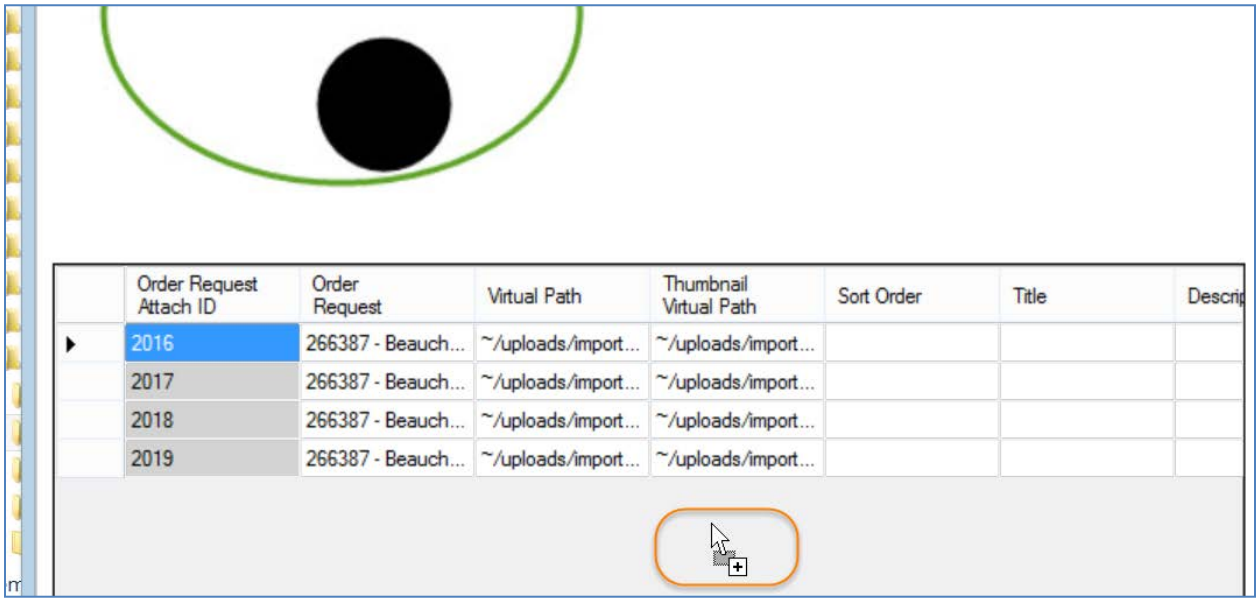
If the software viewer recognizes the file, it will display in the window.

When it doesn't, it launches the program that recognizes the file. (For example, the Microsoft Word program would launch a .docx file.)



However, after the web order has been shipped (completed) in the CT, the **Browse** button on the Public Website is no longer available and the requester cannot attach additional files or documents. If the requester needs to include additional files with his order, he would need to contact the genebank and email the file(s) directly to the genebank. The genebank person processing the order can still attach documents to a shipped order.

The Order Wizard has an **Attachments** tab page which supports the attachment files. In the Order Wizard, attachment files can be manually dragged onto the Order Wizard Attachments page's datagrid:



Splitting an Order

How to Split an Order

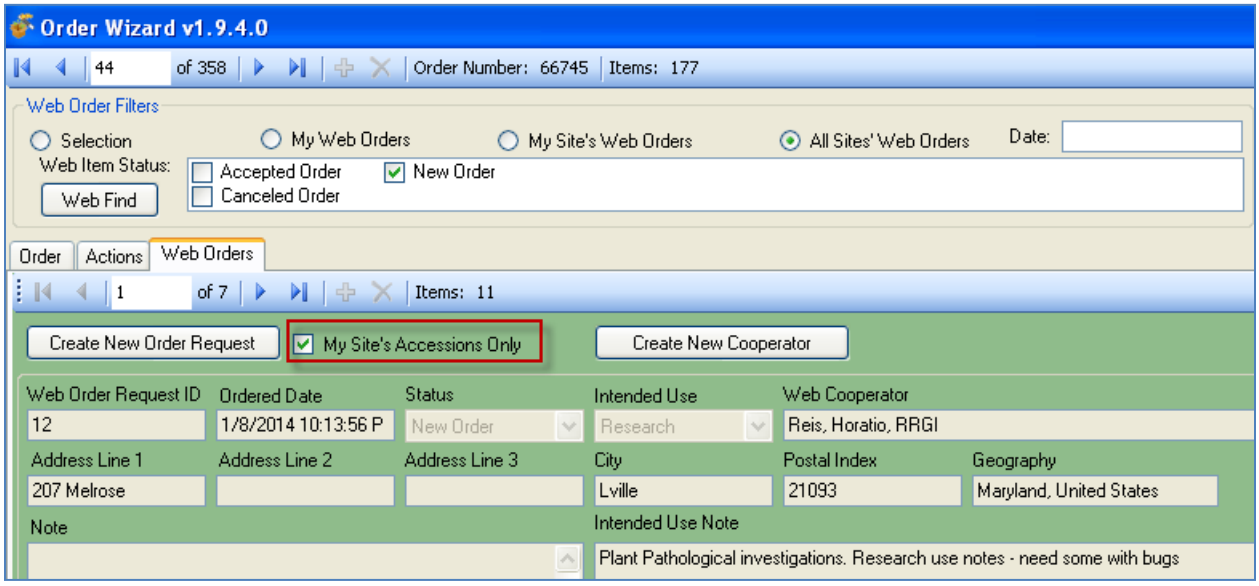
When discussing "splitting an order," there are two primary ways of speaking about this, splitting:

- Incoming web orders
- Partially filled orders when not all of the germplasm is currently available (the unavailable germplasm is moved to a new order to be processed at a later date)

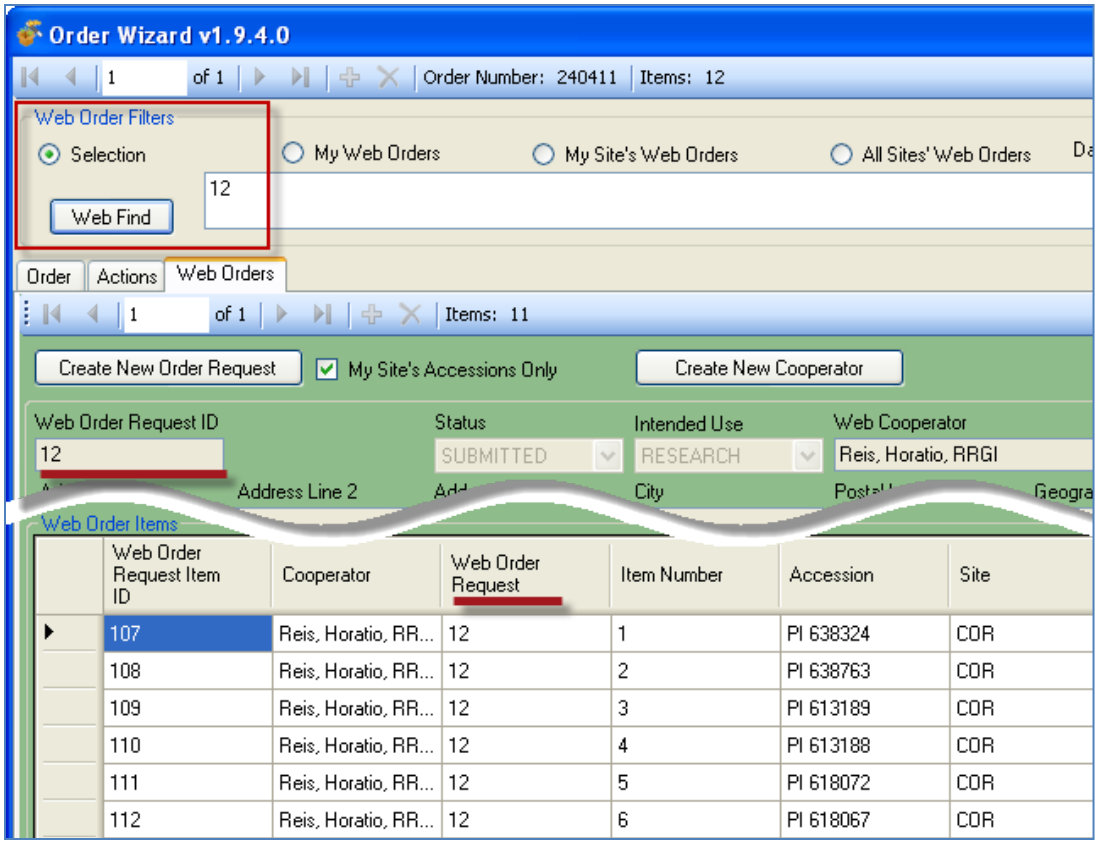
Incoming web orders

Incoming web orders may have requests for germplasm stored at multiple sites – the first site to process that order will split out their site's items from the incoming order. Later, the other involved sites will select their parts of the order. A "site" as used here is a GRIN-Global internal site. For example, in NPGS there are approximately 20 physical sites that store and distribute germplasm. In other GG organizations, there may be just one site, or perhaps, even though they are in the same building, there may be two sites. The staff responsible for seed distribution may be assigned to one site, and the staff involved with clonal / in-vitro collections may be assigned to a different site.

On the **Web Order** tab, select the **My Site's Accessions Only** checkbox when the incoming order needs to be split:



When an incoming web order contains requests for germplasm from multiple sites, the first site to process the order will be processing a *new* order. Other sites that later process the order, will need to look for the order by its **Web Order Number** (its status will no longer be new).



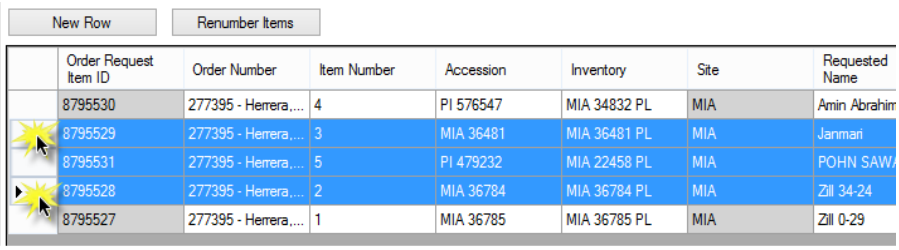
Partially Filling Orders

The second reference to "splitting an order" refers to an order processor being split for some reason, such as germplasm not available for part of the order. The order cannot be completely filled, but rather than wait for all the requested germplasm to become available, the processor will "split the order" and send a partial order. (And later send the other germplasm when it becomes available.)

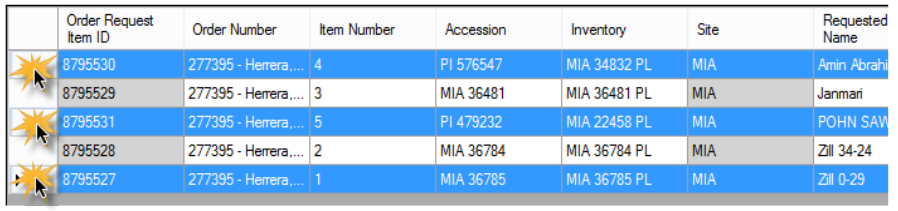
Note

Before splitting, remember that you can select items (accessions) that in the grid by pressing or holding the **Ctrl** or **Shift** keys and clicking the row header cells.

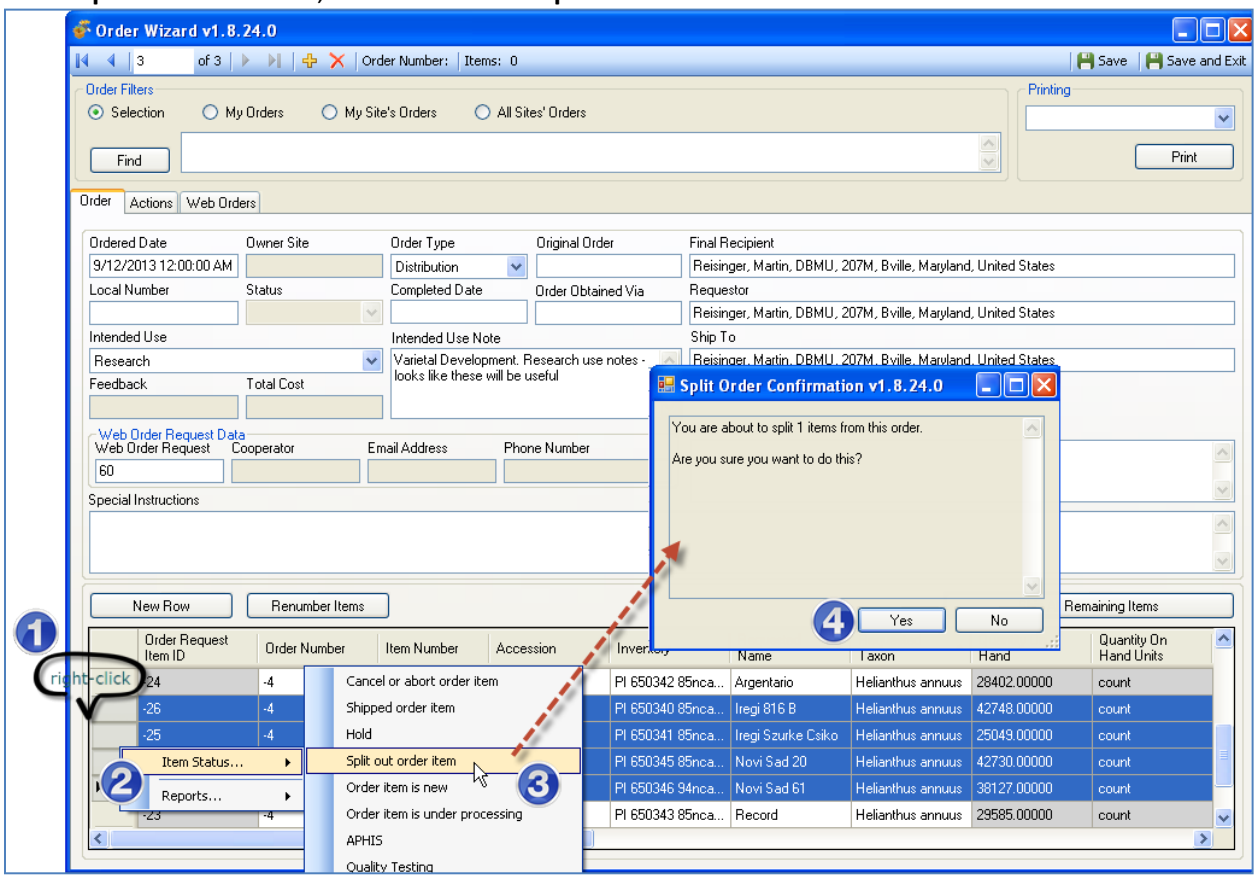
To select ***adjacent*** rows, click, then while holding the **Shift** key, click in the bottom row's header cell.



To select ***non-adjacent*** rows, while holding the **Ctrl** key, click on the header cells.

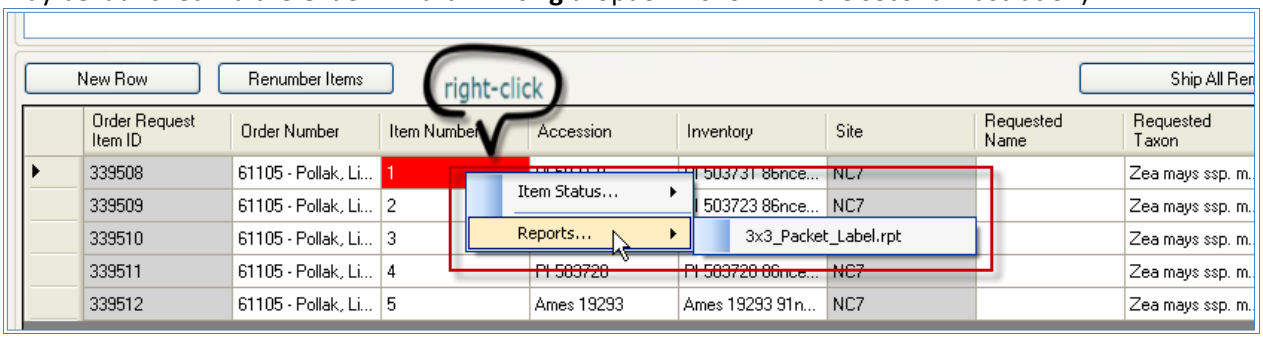


In the Order Wizard, under the **Order** tab, select the order item(s); right-click. Select **Item Status...** then select **Split out order item**; select **Yes** on the **Split Order Confirmation** window.

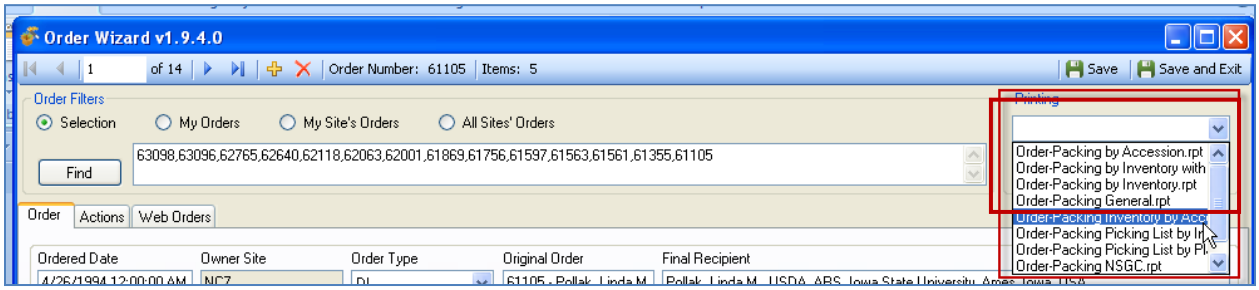


Reports

Beginning in CT v 1.9.4, when selecting reports in the grid, only reports that can be printed for selected individual items will be listed in the menu. Packing slips, picking slips, and other order-related reports may be launched via the Order Wizard **Printing** dropdown shown in the second illustration).



Beginning in CT v 1.9.4, the **Printing** dropdown has a list of relevant reports from which to select.



Appendix: Document Revision Notes

– March 30, 2016

- added graphic for

– February 19, 2016

- added detailed search instructions for listing web orders and orders

– February 17, 2016

- added detailed information and notes pertaining to drag and drops
- included additional screens
- added a section on searching for the **Completed Date**

– June 9, 2015

- added detailed information about order attachments

– May 28, 2015

- added information about editing items in the grid

– March 13, 2015

- extensive editing
- screen captures included from 1.9.6.41