

# Order Processing

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Wednesday, September 11, 2013

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## Caveat: TBD (to be developed)

In the current release, the fields outlined in red, designed for future development, are inactive:

Order Wizard v1.8.24.0

Order Filters: Selection (selected), My Orders, My Site's Orders, All Sites' Orders

Find: 246723

Buttons: Save, Save and Exit, Print

Order Tab: Order, Actions, Web Orders

Ordered Date	Owner Site	Order Type	Original Order	Final Recipient
9/10/2013 12:00:00 AM		Distribution		
Local Number	Status	Completed Date	Order Obtained Via	Requestor
Intended Use	Intended Use Note		Ship To	
Research	Botanical/taxonomic investigations. Research use notes - need it			
Feedback	Total Cost			
Web Order Request Data	Web Order Request	Cooperator	Email Address	Phone Number
50				
Special Instructions				

## Orders Overview

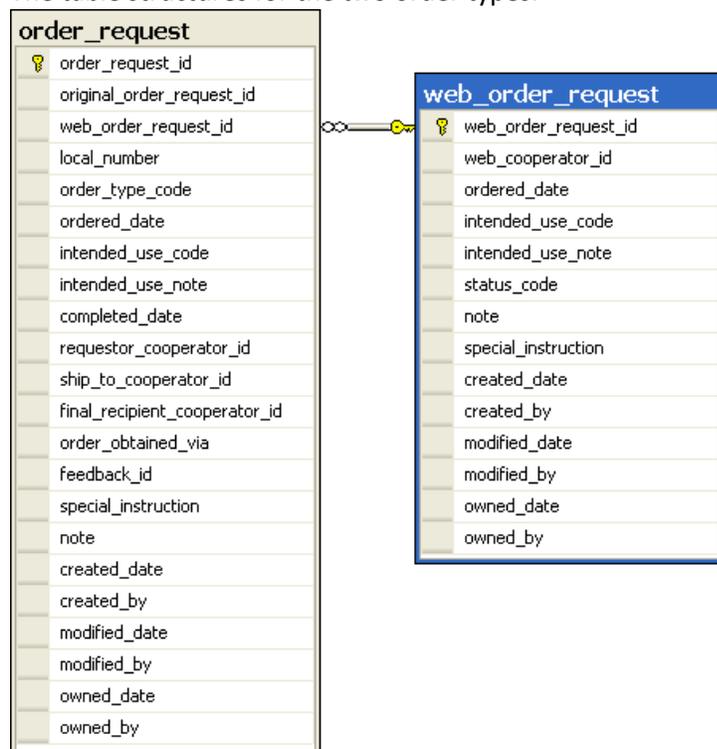
Genbank clients may send orders via the public website, email, faxes, and even the telephone. Obviously each organization will determine valid methods for accepting orders. This document will describe how orders can be processed from any source.

In many organizations, orders typically will be submitted via the Public Website. Users on an organization's Public Website will search for desired accessions and then add them to their shopping carts – eventually submitting their carts for order processing.

### Relationship of “Standard” Orders to Public Website Orders

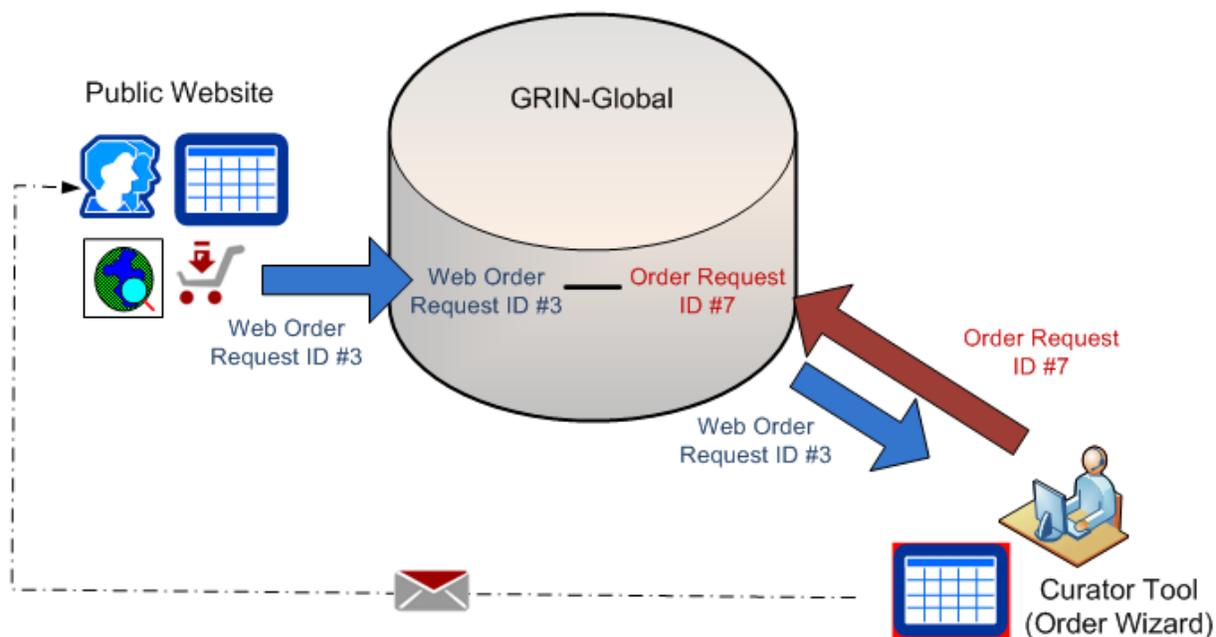
Because the Curator Tool and the Public Website are independent programs - you do not need one to run the other – the orders entered into the Public Website by the researchers and other organizational clients are not stored directly in the tables in which orders entered by genbank personnel in the Curator Tool are stored. Instead, incoming Public Website orders must be converted into GRIN-Global standard orders.

The table structures for the two order types:



When orders come via the public website, new *web* orders are saved in GRIN-Global as *standard* orders for future review and processing.

## Public Website Orders Diagram



Using the Curator Tool, personnel responsible for order fulfillment at the genebank can review those incoming web orders and convert them into GRIN-Global orders. During the order processing, genebank personnel will use the Curator Tool to manage and monitor the progress (status) of the order.



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 are distinct.

The curator tool has several dataviews that pertain to the order process.

The Curator Tool also has an Order Wizard which facilitates the ordering process. The Order Wizard provides a set of comprehensive screens in which new order records are added to the GG database, either manually when incoming orders come via the mail, emails, or verbally, or by converting the incoming web order records when the orders come from the Public Website.

## 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, 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. Generally the associating of the *web* cooperator record to a GG cooperator record is done when a web order is being processed into a standard order.



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.”

Using the GRIN-Global Admin Tool, the GG administrator can also tie together a cooperator record to a web cooperator record:

The screenshot displays the 'User Users - localhost\sqlexpress - Administrator' interface. It features a blue header bar and a navigation pane with tabs for 'General', 'Permissions', and 'Groups'. The main content area is divided into sections. The 'User Name' section includes a text input field, a 'Set Password...' button, and a red error message: 'Password must be set before saving'. Below this is a checked 'Enabled' checkbox. The 'Cooperator Information' section is highlighted with a blue border and contains sub-tabs: 'General', 'Web Login' (which is selected and highlighted with a red box), 'Contact Info', 'Geographic', and 'Notes'. Under the 'Web Login' tab, there is a 'Current Cooperator is (none)' label with a 'Search...' button. Below this are input fields for 'Title:', 'First Name:', and 'Last Name:'. A 'Full Name (for display):' label is followed by a large text input field. At the bottom, there are 'Job:' and 'Discipline:' labels, with the 'Discipline' dropdown menu currently set to 'Aeronomy'.

## 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 education

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 89ncal01 SD	Helianthus tuberosus	7038	count	100
15	7 - Reisinger, Martin, DBMA	2	PI 503279	PI 503279 99ncalm1 TU	Helianthus tuberosus	0	count	5
16	7 - Reisinger, Martin, DBMA	3	PI 503271	PI 503271 95ncalm1 TU	Helianthus tuberosus	0	count	10
17	7 - Reisinger, Martin, DBMA	4	PI 503266	PI 503266 99ncalm1 TU	Helianthus tuberosus	0	count	5
18	7 - Reisinger, Martin, DBMA	5	PI 503265	PI 503265 85ncal01 SD	Helianthus tuberosus	0	count	0

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

- the requestor’s contact information
- how the order was obtained
- who the ultimate recipient is

The individual items being ordered are just that – the items – and each item will be stored as an individual record in the *order request items* table. In the example above, the order contained 5 items. Genebank personnel ultimately use the genebank’s inventory supply to fulfill the ordered items.

## Order Dataviews

In the Curator Tool, two main dataviews are used to display the order information: the **Order Request** dataview, and the **Order Request Items** dataview. In total, there are five main order dataviews (and corresponding tables in the database). Two of these are related to “web” orders being submitted from the internet. The five main GRIN-Global order-related dataviews are:

Dataview	Description
order_request	Provides general information about the order such as the date and type of order, requestor, 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.

Dataview	Description
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 <b>Shipped, Cancelled, Partially Shipped, Filled</b> , and so on. (Each organization can determine what ORDER_REQUEST_ACTION codes they need for their organization's order fulfillment process.)
web_order_request	Provides general information about web orders such as the date and type of order, requestor, final recipient, etc. This web order request is generated by a requestor 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)

## Order Wizard

The first three dataviews listed in the above table are Curator Tool dataviews used for editing and reviewing order record data. However, rather than use the dataviews, most Curator Tool users will find the Order Wizard to be more satisfactory for reviewing order data. (The remaining two dataviews are used during by the Public Website for the web ordering process.)



Refer to the *Creating New Order Records from Web Orders Using the Wizard* section if you are processing orders received via the Public Website. For orders emailed, faxed, etc., continue below.

## Using the Order Wizard to Create a New Order

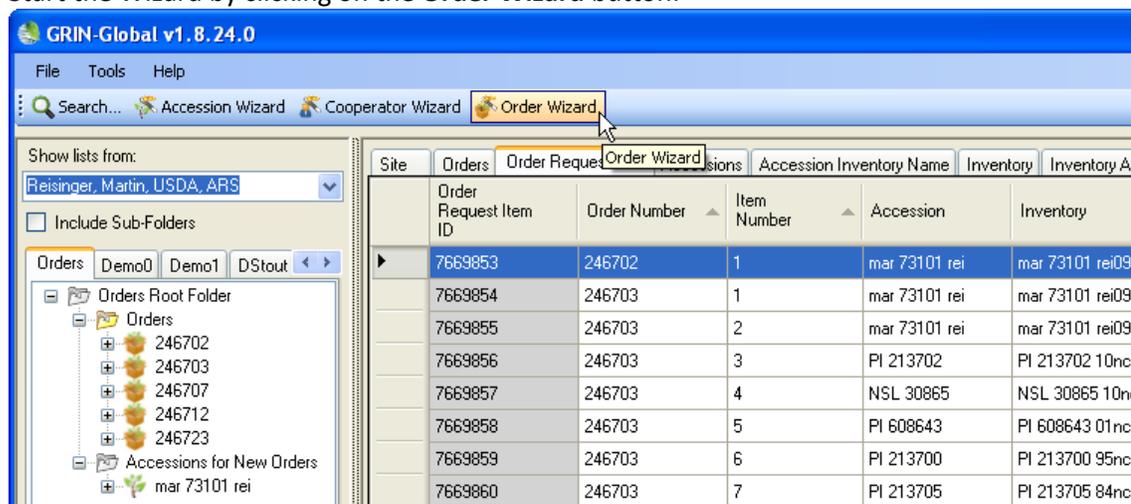
### Step 1



When starting up the CT, 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' statuses, or date received, etc. Although not necessary, in the Curator Tool, have the folder active in which you intend to create order list items (that will ultimately point to your newly created orders). Also helpful but not required, in the right grid, you may want to select the **Get Order Request** dataview as your active dataview.

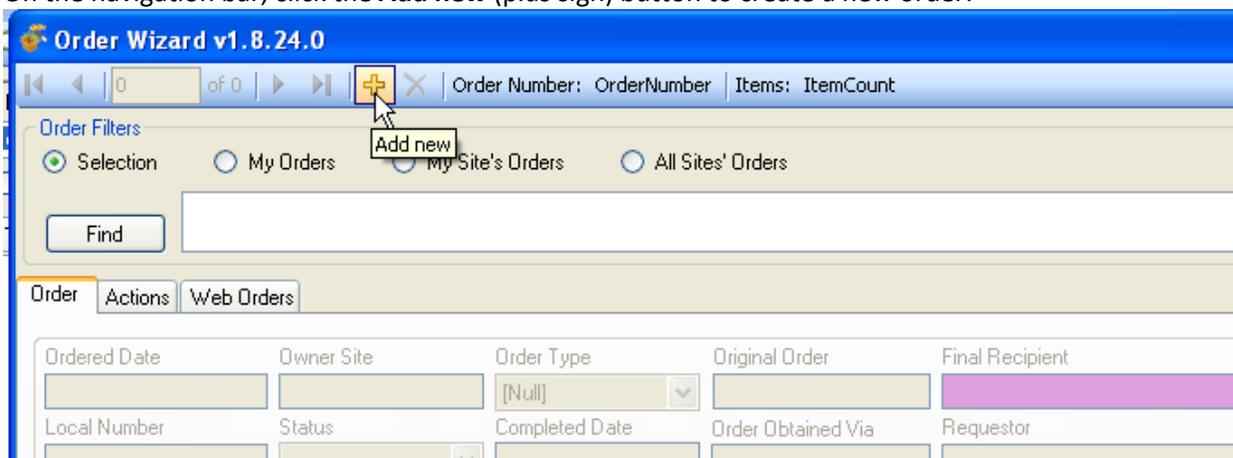
When an email comes into the site with an order specifying the accessions, these accessions can be dragged into the Order Wizard grid and the Order Wizard will select the relevant inventory (but we are getting ahead of ourselves).

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



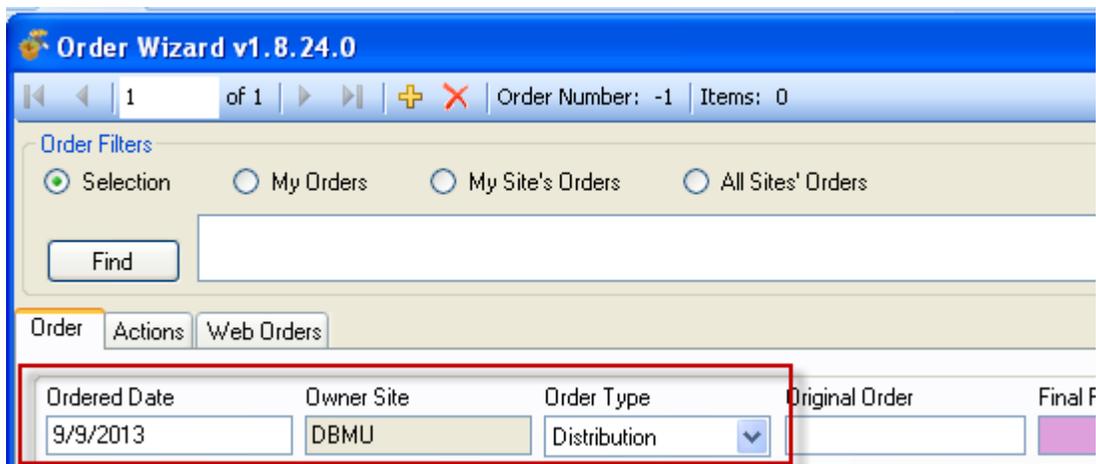
## Step 2

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



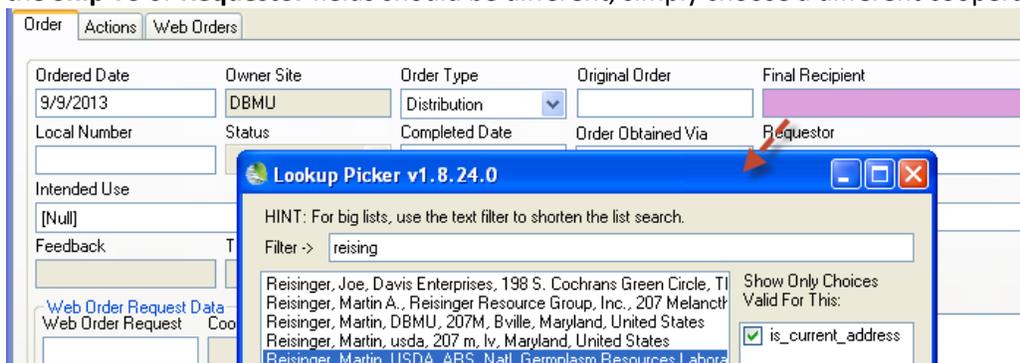
After you click the **Add new** button, the wizard automatically fills in the:

- **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 **Requestor** and **Ship To** fields fill in automatically with the same cooperators. For orders where the **Ship To** or **Requestor** fields should be different, simply choose a different cooperator as appropriate.



### Step 4

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



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.

(To be developed [tbd]: Three fields shown in some of these screen captures are not currently being used. Depending on the release, they may or may not be displayed: **Status**, **Feedback**, and **Total Cost**.)

## 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.

### Step 5a

On this one, you can also just drag and drop in the order item space and the wizard will select the distribution lot for that accession – as long as you have the Accession prefix and Accession number - I usually use the inventory picker when I need to change what lots I want to request (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) so I need to select another lot from the Inventory picker.

Perhaps the easiest way to create new orders from the requestor's email using the Order Wizard may be to copy and paste the Accession ID into the Inventory Picker.

First click the **Add New** icon (the Plus Sign) icon; click the **New Row** icon; then paste the Accession ID from the email into the **Inventory Picker** field:

Order Wizard v1.8.24.0

Order Filters: Selection (selected), My Orders, My Site's Orders, All Sites' Orders

Find: 246702

Order: Actions Web Orders

Ordered Date: 9/10/2013, Owner Site: DBMU, Local Number: , Status: , Intended Use: [Null], Feedback: , Total Cost: , Web Order Request Data: Web Order Request, Cooperator, Special Instructions: , New Row, Renumber

Inventory Picker

Accession Number: PI 262168

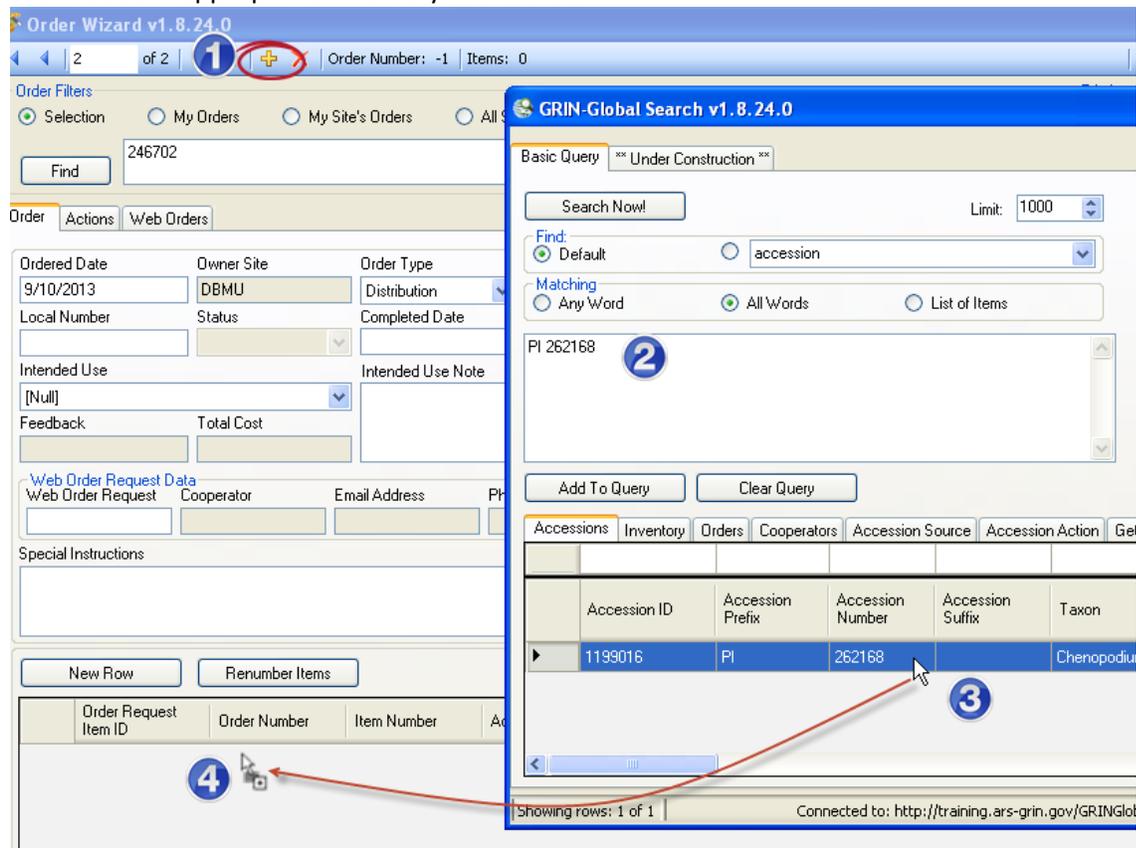
Accession Name: , Taxonomy:

Inventory Prefix	Inventory Number	Inventory Suffix	Inventory Type	Inventory Maintenance Policy	Is Distributable?	Is Available?	Ave. Stat
NSSL	256606	51	SD	CRYO	N	Y	Ava
NSSL	256606	52	SD	CRYO	N	Y	Ava
PI	262168		**	SYSTEM	N	N	No I
PI	262168	02ncal01	SD	NC7-quinoa	Y	Y	Ava
PI	262168	82hncp01	SD	NC7-quinoa	N	N	Orig

Order Request Item ID, Order Number, Item Number, Accession, Inventory, Requested Name, Requested Taxon, Quantity On Hand, Quantity On Hand Units

### Step 5b: Dragging an Accession Row

Alternatively, you can find an Accession via the Search Tool or from a dynamic folder, and then select that accession row and drag the accession row into the Order Wizard grid. The program automatically chooses the best inventory to fill the order request (based on a set of programmed business rules) and then 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.

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 on next page)

Show lists from: **Reisinger, Martin, USDA, ARS**

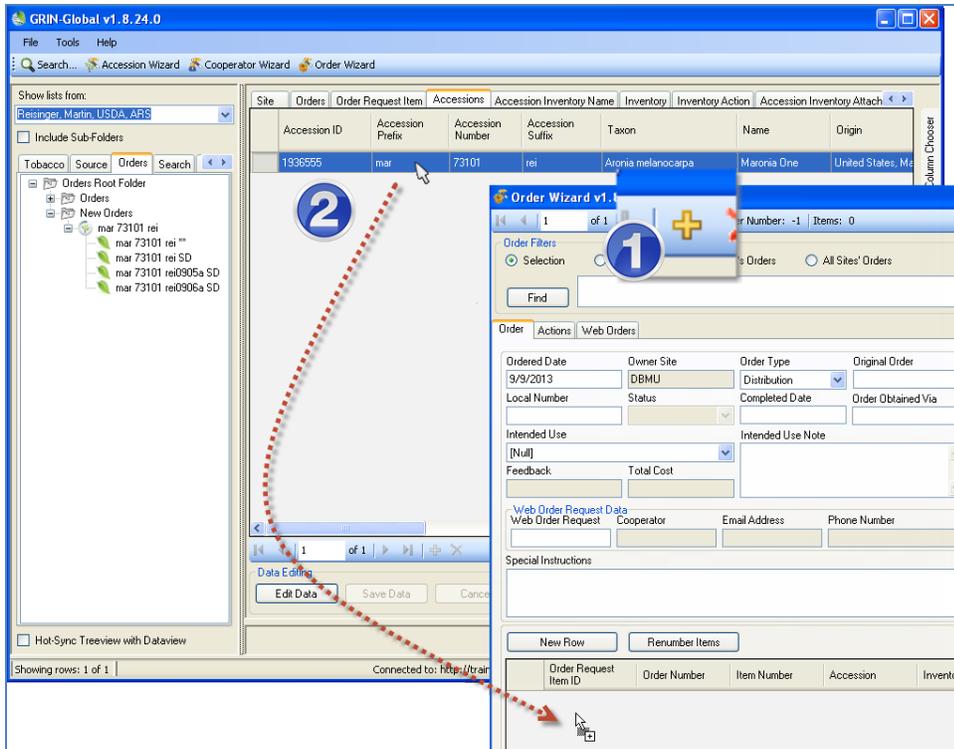
Include Sub-Folders

Tobacco Source Orders Search

- Orders Root Folder
  - Orders
    - New Orders
      - mar 73101 rei
        - mar 73101 rei \*\*
        - mar 73101 rei SD
        - mar 73101 rei0905a SD
        - mar 73101 rei0906a SD

Site	Orders	Order Request Item	Accessions	Accession Inventory Name	Inventory	Inventory Action	Accession Inventory Attach		
Inventory ID	Inventory Prefix	Inventory Number	Inventory Suffix	Inventory Type	Accession	Is Distributable?	Is Auto Deducted?	Is Available?	Availability Status
4910623	mar	73101	rei	**	mar 73101 rei	N	N	N	No value specified
4910638	mar	73101	rei	SD	mar 73101 rei	N	N	N	Available to send
4910781	mar	73101	rei0905a	SD	mar 73101 rei	Y	Y	Y	Available to send
4910784	mar	73101	rei0906a	SD	mar 73101 rei	Y	Y	N	Available to send

Answer: **inventory mar 73101 rei0905a SD** -- Why? Of the four inventory records, this is the only inventory record whose fields **Is Available?** and **Is Distributable?**



### Step 5c: Dragging Inventory

You can also drag an inventory record from the Curator Tool data grid or the Search Tool to the Order Wizard grid in the Wizard window. The wizard will automatically fill in the order item details from the data stored in the inventory record.

In the Order Wizard, click the **Add New** icon (the Plus Sign) icon; click the **New Row** icon. In the Curator Tool, click on the **Inventory** Tab in the data grid to ensure that Inventory is the active data view. Select an inventory item; drag the inventory row to the Order Wizard grid.

### Step 5d: Filling the Order by Taxonomy

Order Wizard v1.8.24.0

Order Filters: Selection, My Orders, My Site's Orders, All Sites' Orders

Find: 246702

Order: Actions, Web Orders

Ordered Date: 9/10/2013, Owner: DBMU, Local Number, Status, Intended Use: [Null], Feedback, Total C, Web Order Request Data, Web Order Request, Cooperate, Special Instructions

**Inventory Picker**

Accession Number:   
Accession Name:   
Taxonomy: Aronia

Inventory Prefix	Inventory Number	Inventory Suffix	Inventory Type	Inventory Maintenance Policy	Is Distributable?	Is Available?	Av St
Ames	29997	11ncai01	SD	NC7-woody.lands...	N	N	Lo
Ames	29997	12ncai01	SD	NC7-woody.lands...	Y	N	Lo
Ames	29997	13ncai01	SD	NC7-woody.lands...	N	N	Plk
Ames	29998		**	SYSTEM	N	N	Nc
Ames	29998	09ncaom1	PL	NC7-woody.lands...	Y	N	Lo
Ames	29998	11ncai01	SD	NC7-woody.lands...	Y	Y	Av

New Row, Renumber Items, Ship All Remaining Items, OK, Cancel

Order Request Item ID, Order Number, Item Number, Accession, Inventory, Requested Name, Requested Taxon, Quantity On Hand, Quantity On Hand Units

## Step 6: Including Order Actions

need to elaborate...

## Step 7

Click the **Save** button to save your order. (If you are finished with adding records to the order, click on the or **Save and Exit** button

Order Item ID	Order Request	Item Number	Accession	Inventory	Item Name	Requested Taxonomy Name	Taxon
-2	-1	1	PI 543956	DPRU 1649 000...	Sun Crest		Prunus dom

## Step 8

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



For all items in the grid, when the status is **Order item is new (NEW)** or **Order item is under processing (PENDING)** in the **Item Status** column, clicking on the **Ship All Remaining Items** button will change the status to **Shipped order item (SHIPPED)**.

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

Also, any change to a item status automatically creates an **Order Action** record.

Order Request Action ID	Order Request	Action Name	Started Date	Started Date Format	Action Information	Completed Date	Completed Date Format
349672	246728 - Reisinger, Martin, USDA, ARS	New Order	9/9/2013 8:25 PM	Complete date		9/9/2013 8:25 PM	Complete date

## Step 9

Click the **Save and Exit** button to save your order and to exit the wizard.

## Creating New Order Records from Web Orders Using the Wizard

Many 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.

### Step 1: Start the Order Wizard

1. Start the Wizard by clicking on the **Order Wizard** button:



## Step 2

Click the **Web Orders** tab; select the pertinent radio button: (**My Web Orders**, **My Site's Web Orders**, or **All Sites' Web Orders**); for processing new orders select the **New Order** checkbox.

Order Wizard v1.8.24.0

Order Number: 246728 Items: 1

Web Order Filters

My Web Orders  My Site's Web Orders  All Sites' Web Orders

Web Order Item Status

Accepted Order  New Order  Canceled Order

Navigation bar

Create New Order Request Create New Cooperator Cancel This Web Request

Web Order Request ID	Ordered Date	Status	Intended Use	Web Cooperator
48	9/9/2013 9:10:07 PM	New Order	Research	Anonymous, guest, Org

Address Line 1: 207 mel  
Address Line 2:   
Address Line 3:   
City: Iville  
Postal Index: 20550  
Geography: Maryland, United States

Note: Entomological investigations. Research use notes - bugs are evreywhere

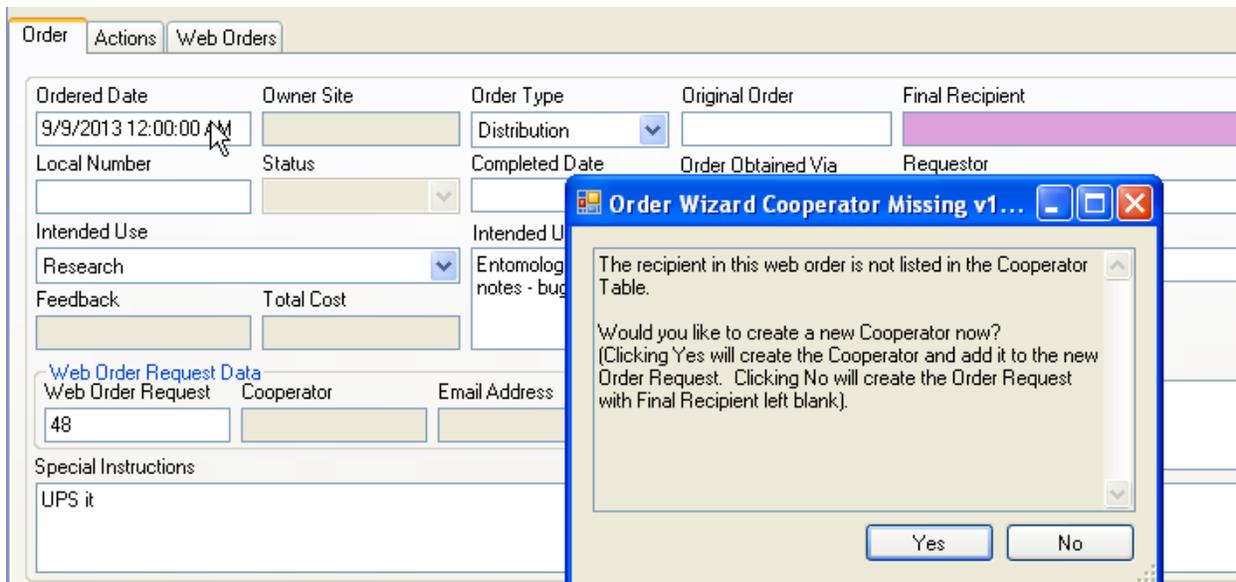
Special Instruction: UPS it

Web Order Request Item ID	Cooperator	Web Order Request	Item Number	Accession	Name	Quantity Shipped	Units (of Shipped)	Distribution Form	S
369	SYSTEM, (Defau...	48	1	mar 73101 rei			count	SD	Or

In the example above, there is only one new web order. If there had been more than one, the person using the Order Wizard can review each web order using the navigation bar to move among the records and decide how to proceed – for example, there is a **Create New Order Request** button as well as a **Cancel This Web Request** button.

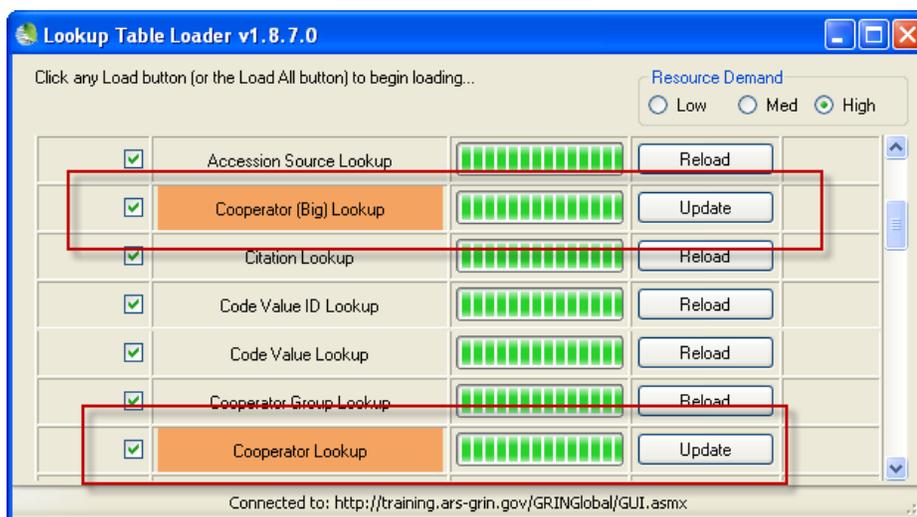
## Step 3

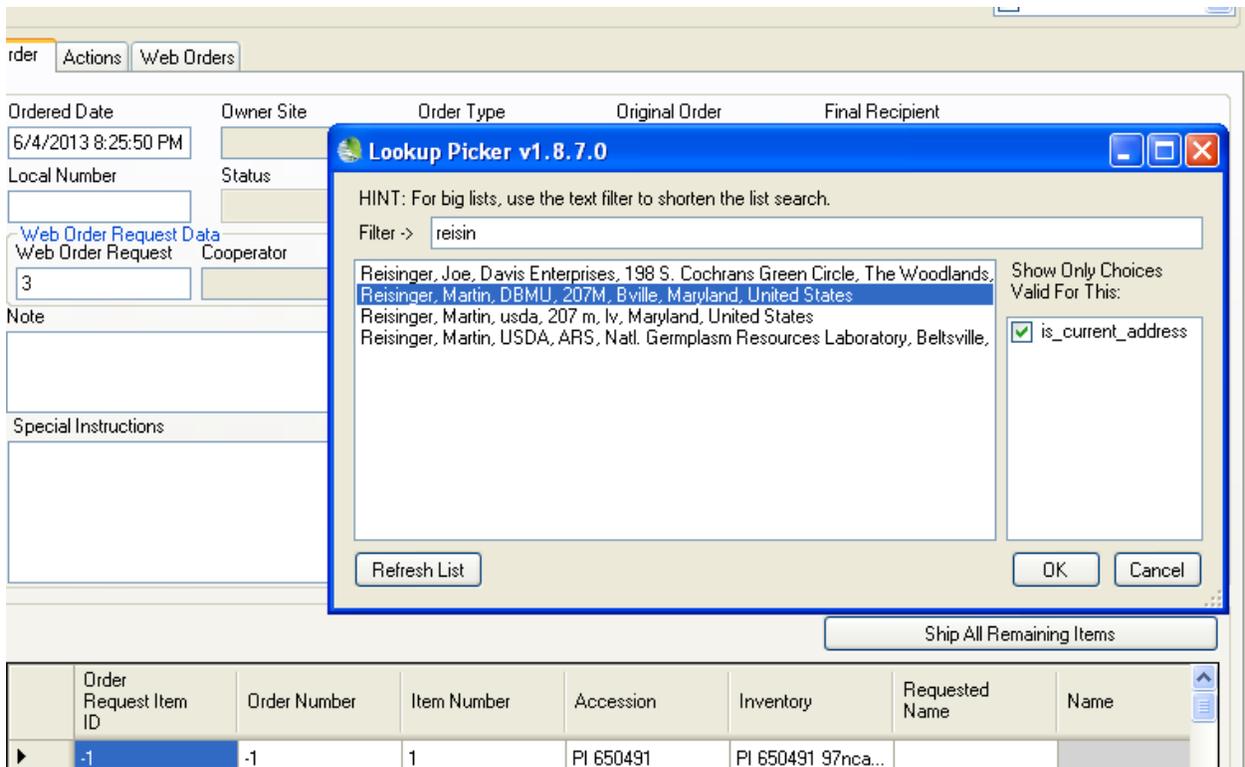
Click the **Create New Order Request** button to initiate a new GRIN-Global order request. If the incoming web order did not have a valid cooperator associated with it, the prompt to create a new cooperator will display:



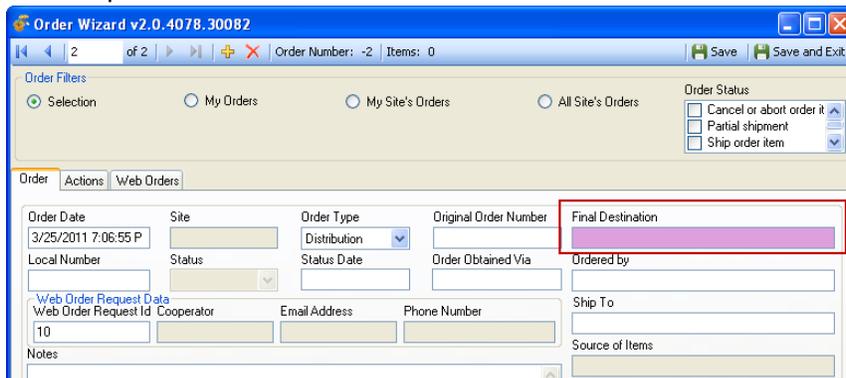
If the **Create New Cooperator** button is clicked when processing the web order, you will have an opportunity to generate a standard coopererator from the user's web coopererator information.

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



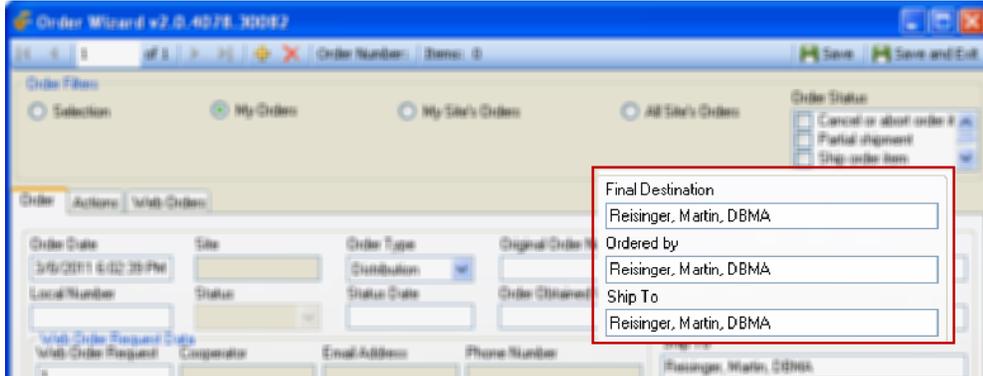


A blank **Final Destination** field is the result of answering **No** to the choice when prompted to create a new cooperator:



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:

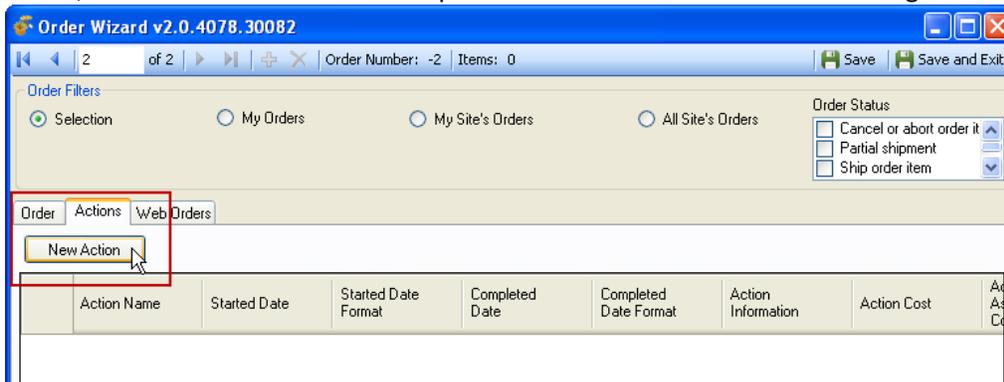


## Actions

Various actions may be applied to an order request; essentially the “action” is a snapshot in a moment in time indicating an order event that occurred. 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 ...

Some of the action codes that come installed with GRIN-Global (which can be modified or supplemented) include: CANCEL, HOLD, and SHIPPED.

When an action is to be recorded for an order, use the Order Wizard’s **Actions** tab to update the order’s status; click on button and then complete and save the Action record in the grid:



Order Wizard v2.0.4078.30082

2 of 2 | Order Number: -2 | Items: 0

Save Save and Exit

Order Filters

Selection
  My Orders
  My Site's Orders
  All Site's Orders

Order Status

Cancel or abort order it  
 Partial shipment  
 Ship order item

Order Actions Web Orders

New Action

	Action Name	Started Date	Started Date Format	Completed Date	Completed Date Format	Action Information	Action Cost
✎	Order sent to APHIS	3/25/2011	[Null]		[Null]		35.00

## Finding Existing Orders with the Order Wizard

The Order Wizard can be used to find existing orders for review or additional processing. You can start up 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.

## Copying Existing Order Numbers into the Order Wizard

Copying these five cells from Excel...

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

displayed this window:

Order Wizard v1.8.24.0

1 of 5 | Order Number: 246702 | Items: 1

Order Filters

Selection  My Orders  My Site's Orders  All Sites' Orders

Find

Order Actions Web Orders

Order Date: 37 00:00 AM | Owner Site: | Order Type: Distrib | Original Order: | Final Recipient: Barbara P

Special Instructions: please snd aspa

New Row Renumbr Items

Order Request Item ID	Order Number	Item Number	Accession	Inventory	Requested Name
7669853	246702 - Zilinska...	1	mar 73101 rei	mar 73101 rei090...	Maronia One

Look closely at the list – the last order number in the list is 246723, which is the same number shown in the Find text box. The other numbers were also copied, but they are not visible unless you scroll up. Observe the navigation bar at the top. Notice that record 1 of 5 is currently displayed. The first number in the Excel list was the 246702 – so the wizard is simply displaying the first found record. Using the navigation bar to move through the records will show that the five were properly found.

## 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)

GRIN-Global v1.8.24.0

File Tools Help

Search... Accession Wizard Cooperator Wizard Order Wizard

Show lists from: Reisinger, Martin, USDA, ARS

Include Sub-Folders

Orders DStout Traits2 De

Site	Orders	Order Request Item	Accessions	Accession Inventory Name	Inventory	Inventory Action	Accession Inventory Attach	Ir
Accession ID	Accession Prefix	Accession Number	Accession Suffix	Taxon	Name	Origin		
1563954	PI	131228		Prunus domestica	Prince Englebert	United Kingd		
1563959	PI	126882		Prunus domestica	Laxton's Gage	United Kingd		
1540615	DPRU	2404		Prunus domestica	Doneckaya Kons...	Latvia		
1612451	DPRU	2419		Prunus domestica	Sans Noyau	United State		
1226720	PI	300259		Prunus domestica	Pocegaca	Netherlands		
1552545	DPRU	1839		Prunus domestica	Wagenheim Fruh...	Germany		
1552558	DPRU	1960		Prunus domestica	Timpurii Rivers	Romania		
1552559	DPRU	1963		Prunus domestica	Anna Spath	Romania		
1552560	DPRU	2006		Prunus domestica	T101	Former Serbi		
1552561	DPRU	2011		Prunus domestica	W1	Former Serbi		

### Step 2: Make a List of these Accessions

GRIN-Global v1.8.24.0

File Tools Help

Search... Accession Wizard Cooperator Wizard Order Wizard

Show lists from: Reisinger, Martin, USDA, ARS

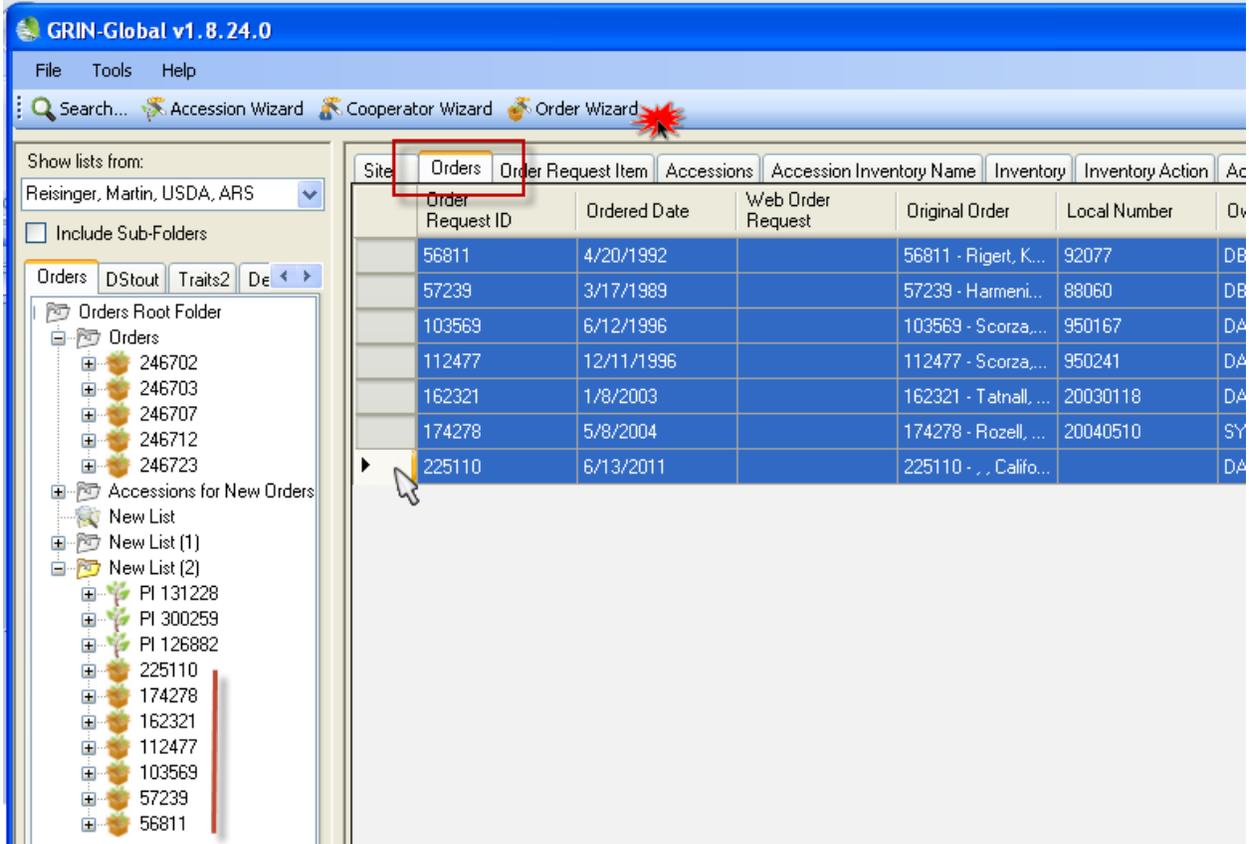
Include Sub-Folders

Orders DStout Traits2 De

Site	Orders	Order Request Item	Accessions	Accession Inventory Name	Inventory	Inventory Action	Accession Invento
Accession ID	Accession Prefix	Accession Number	Accession Suffix	Taxon	Name		
1226720	PI	300259		Prunus domestica	Pocegaca		
1563954	PI	131228		Prunus domestica	Prince Englebert		
1563959	PI	126882		Prunus domestica	Laxton's Gage		

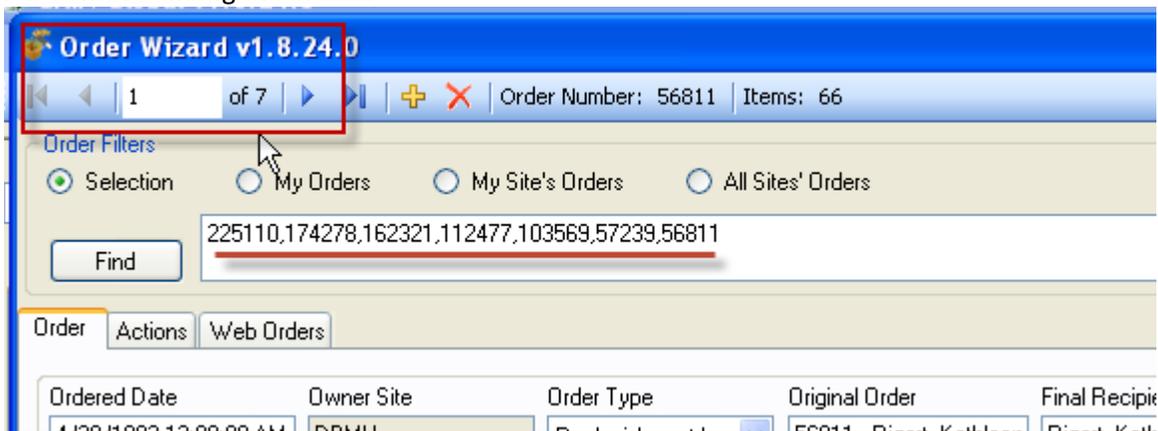
*Step 3: Open the Order Request dataview*

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.



## Order Filters

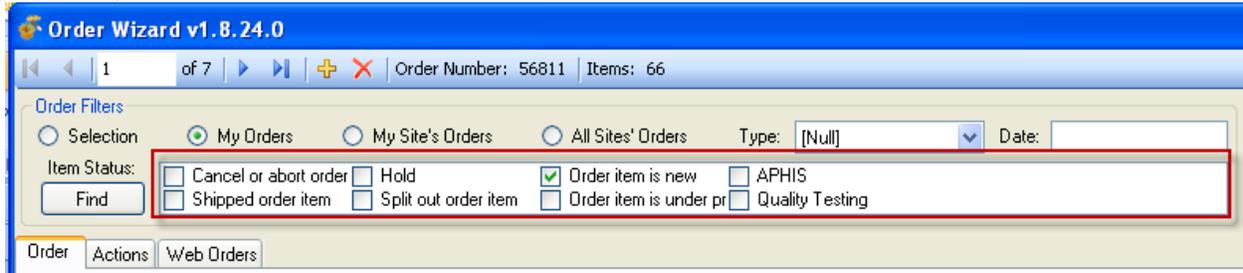
The Order Wizard has several available filters.

### Selection

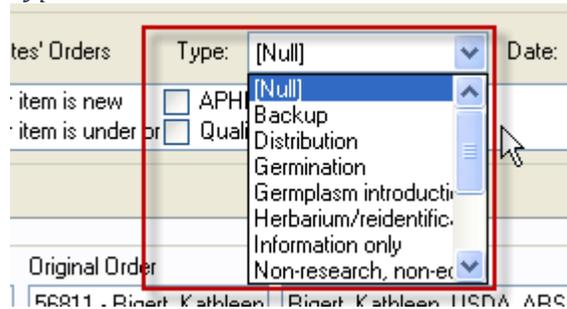
See the *Selecting Records before Starting the Order Wizard* section for details.

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

When any of these buttons are used, the Find box is filled with various Order *Item status* checkboxes.



### Type

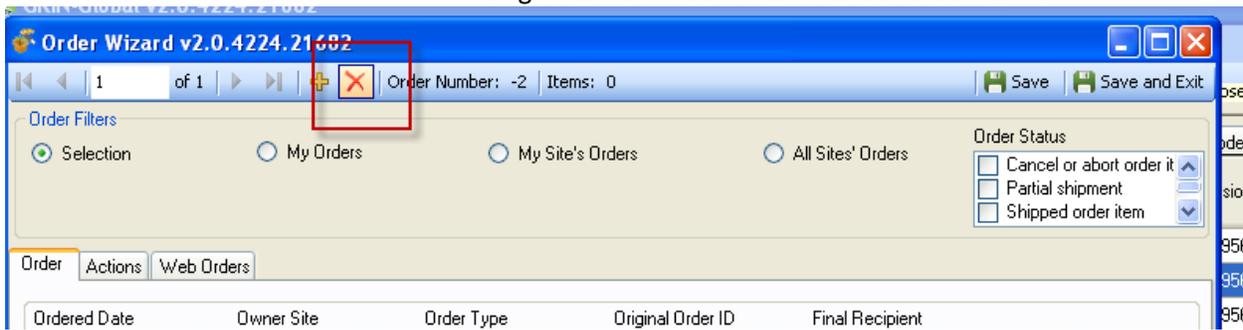


### Date

## 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.

	Order Item ID	Order Request	Item Number	Accession	Inventory	Item Name	Requested Taxonomy Name	Taxon
	3	-1	1	PI 543956	DPRU 1649 0000A.PL	Sun Crest		Prunus dome

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



# Splitting an Order

For various reasons you may need to split an order: some of the germplasm may not be available and yet you have some of the germplasm ready to send; want to send the part of the need to tbd

The screenshot shows a web application interface for order management. At the top, there are 'Order Filters' with radio buttons for 'Selection' (selected), 'My Orders', 'My Site's Orders', and 'All Sites' Orders'. A search box contains '246735' and a 'Find' button. Below this are tabs for 'Order', 'Actions', and 'Web Orders'. The main area contains a form with fields for 'Ordered Date', 'Owner Site', 'Order Type', 'Original Order', 'Final Recipient', 'Local Number', 'Status', 'Completed Date', 'Order Obtained Via', 'Requestor', 'Intended Use', 'Intended U', 'Feedback', and 'Total Cost'. There is also a section for 'Web Order Request Data' with fields for 'Web Order Request', 'Cooperator', and 'Email Address', and a 'Special Instructions' text area. A 'Split Order Confirmation v1.8.24.0' dialog box is overlaid on the form, asking 'You are about to split 1 items from this order. Are you sure you want to do this?' with 'Yes' and 'No' buttons. Below the form is a table with columns: 'Order Request Item ID', 'Order Number', 'Item Number', 'Accession', 'Inventory', 'Requested Name', 'Requested Taxon', and 'Qua Han'. The table contains two rows: one for item 1 (Accession: mar 5 rei, Inventory: mar 1 rei2013k SD, Requested Name: Ribes aureum, Requested Taxon: 2000) and one for item 2 (Accession: PI 330672, Inventory: PI 330672 76i SD, Requested Name: 4850, Requested Taxon: Maireana brevifolia, 394C). A context menu is open over the second row, listing actions: 'Cancel or abort order item', 'Shipped order item', 'Hold', 'Split out order item', 'Order item is new', 'Order item is under processing', 'APHIS', and 'Quality Testing'. The 'APHIS' option is highlighted in red. There are also 'New Row' and 'Renumber Items' buttons above the table.

# Reports

tbd

## Questions

Reasons for splitting an order:

1. some germplasm is not available
2. sending stuff to APHIS
3. why "APHIS" in the find? (international usage)
- 4.