

Order Processing



Revision Date

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Draft – work in progress

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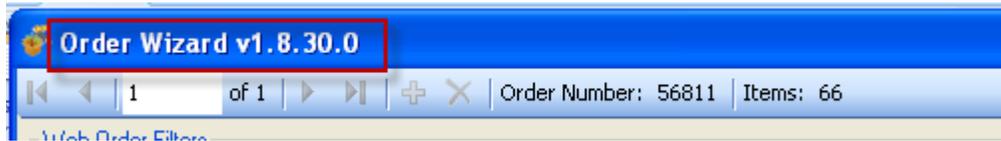
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Current release

The release being documented is:



Release 1.8.30.0 Notes

The new CT will require new dataviews (included in this email). Here are the changes you should test:

- The **Ship All** button should work for APHIS order items...
- When the completed_date is populated in the order header there is an action added with a action_code of **DONE**
- Total Cost is now being calculated for costs captured in order_request_actions
- The Feedback text box and label are now hidden
- Cancelling all order_request_items in a new order will properly populate the order_request completed_date using direct datagrid edits or the context menu
- The note for APHIS has been fixed to properly record that the order has been sent to 'Plant Inspection'
- The web_order_request_items and web_order_request dataviews now hides the created/modified/owned *by and *date columns
- The web_order_request_items and order_request_items dataviews now show a new column for xPVP status warning

Release 1.8.33.0 Notes

This new version has these changes:

- Fixed a minor bug that prevented the order_request completed date from being populated when a new order was immediately cancelled for all items.
- The 'Ship All' button should work properly for APHIS order items now...
- When the completed_date is populated in the order header there is an action added with a action_code of 'DONE'
- Total Cost is now being calculated for costs captured in order_request_actions

- The Feedback text box and label are now hidden
- Cancelling all order_request_items in a new order will properly populate the order_request_completed_date using direct datagrid edits or the context menu
- The note for APHIS has been fixed to properly record that the order has been sent to 'Plant Inspection'
- The web_order_request_items and web_order_request dataviews now hide the created/modified/owned *by and *date columns
- Added support for accession_source_map table in the Accession Wizard Source Tab
- Added support for source_desc_observation table in the Accession Wizard Source Tab
- Added a checkbox 'My Site's Accessions Only' to the Order Wizard Web Order Tab – basically this will split the web order up by site if it is left checked
- Added a switch statement to the 'Create Order Request' button click event to properly populate the order_request.order_type in the Order Wizard from the Web Order Request Intended Use field

Orders Overview

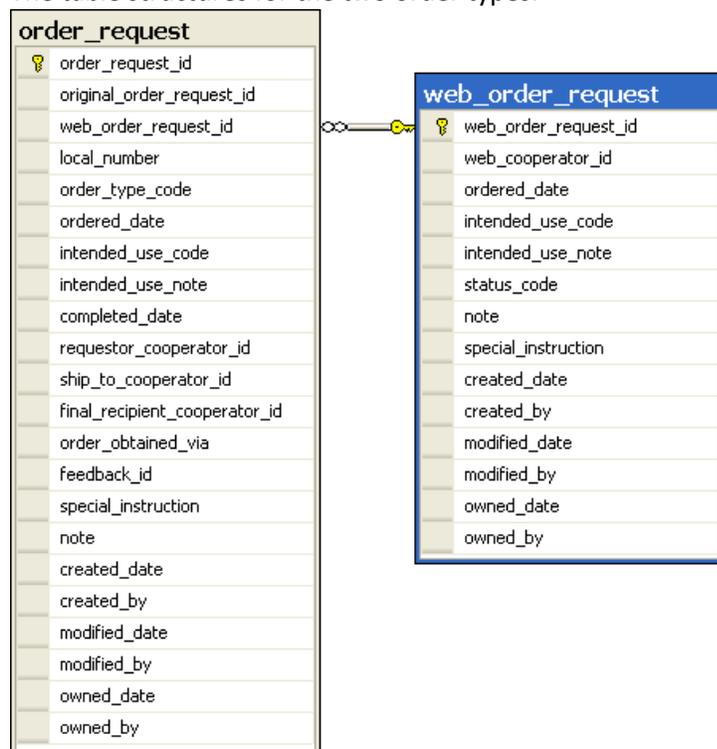
Genbank clients may send orders via the public website, email, faxes, and even the telephone. Obviously each organization will determine valid methods for accepting orders. This document will describe how orders can be processed from any source.

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

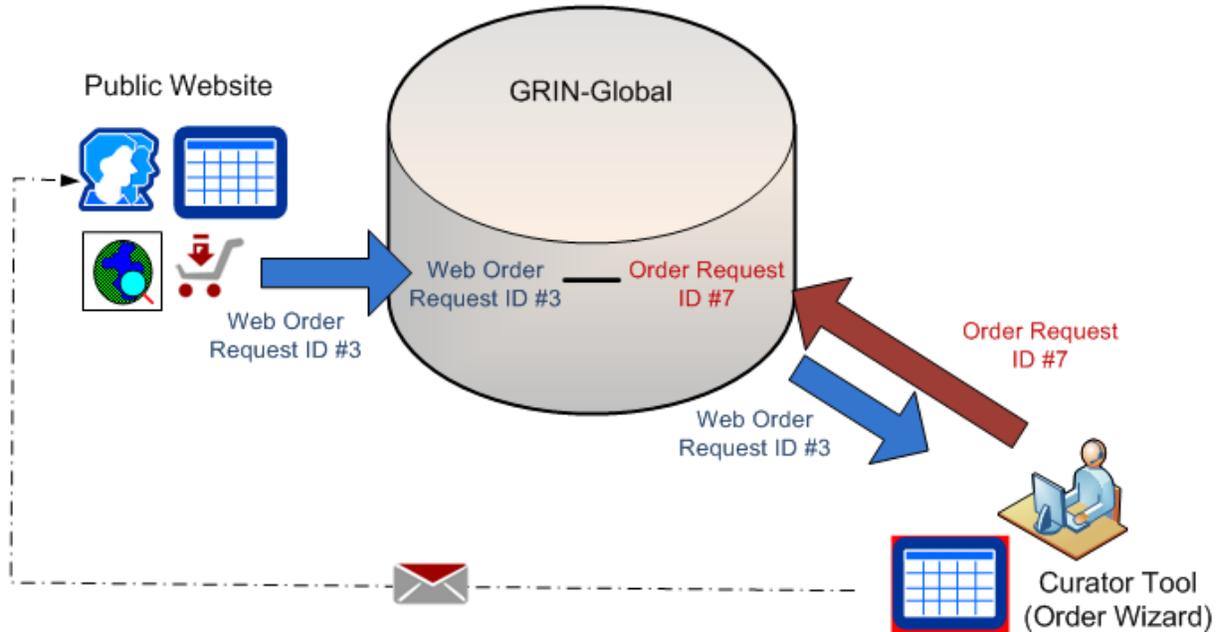
Because the Curator Tool and the Public Website are independent programs - you do not need one to run the other – the orders entered into the Public Website by the researchers and other organizational clients are not stored directly in the tables in which orders entered by genbank personnel in the Curator 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, genbank personnel will review the new *web* orders and then save valid *web* orders as *standard* orders in GRIN-Global for further 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.

NPGS Specifics

High-level Differences Between GRIN Classic and GRIN-Global

In GRIN, when adding bulk orders (multiple orders at one time), the Data Prep tables were used. With the change in GRIN-Global where most of the orders will be coming in as web orders instead of emails, you no longer need to create spreadsheets to be used with the Data Prep tables.

(You will 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.)

If you did need to manually input multiple orders at one time, you could use the drag and drop method to drop the order header information into the Curator Tool, using 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

The first method is to select your new orders and start the Order Wizard. In the Order Wizard, for each order, drag the order items data from a spreadsheet into the grid at the bottom of the wizard.

Method 2: Dragging Order Items into the Order Request Items Dataview

In the second method, you could use the Curator Tool's **Get Order Request Item** dataview and drag and drop the order item data into the dataview. 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).

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:

A screenshot of the GRIN-Global Admin Tool interface. The window title is "User Users - localhost\sqlexpress - Administrator". The interface has a blue header bar. Below the header, there are three tabs: "General", "Permissions", and "Groups". The "General" tab is selected. Under "General", there is a "User Name:" label, an empty text input field, a "Set Password..." button, and a red error message: "Password must be set before saving". Below this is a checked checkbox labeled "Enabled". A section titled "Cooperator Information" contains several sub-tabs: "General", "Web Login", "Contact Info", "Geographic", and "Notes". The "Web Login" tab is highlighted with a red box. Under "Web Login", there is a "Current Cooperator is (none)" label and a "Search..." button. Below this are three input fields for "Title:", "First Name:", and "Last Name:". There is also a "Full Name (for display):" label and a text input field. At the bottom, there are "Job:" and "Discipline:" labels. The "Discipline:" dropdown menu is open, showing "Aronomy" as the selected option.

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 65ncal01 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 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	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



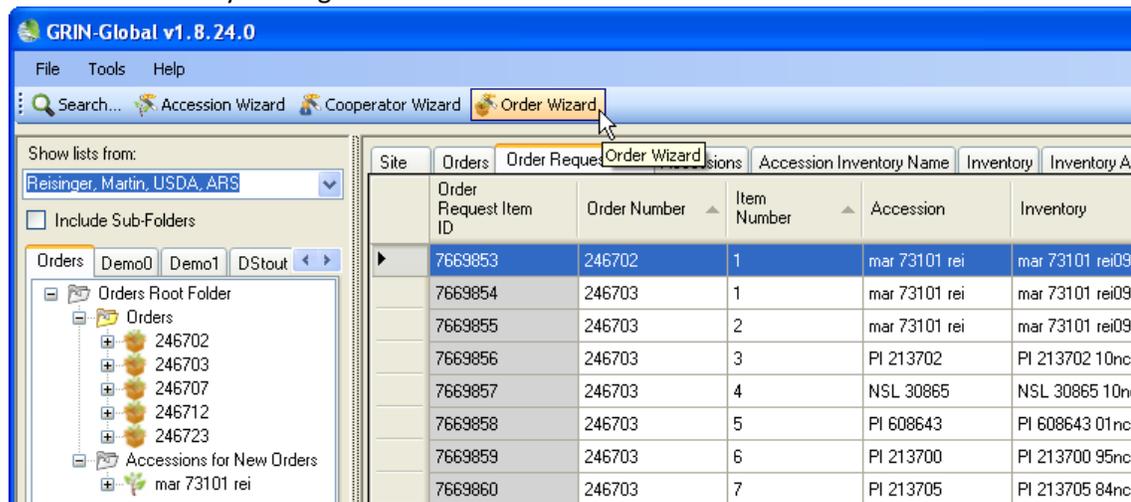
When starting up the CT, the left tab in the list panel will be active and display the lists under that tab. Consider setting up your folder hierarchy under that left tab so that the lists help with tracking your orders by status or date received or some other criterion. Although not necessary, when working with orders in the Curator Tool, have the folder active in which you intend to use to point 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.

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).



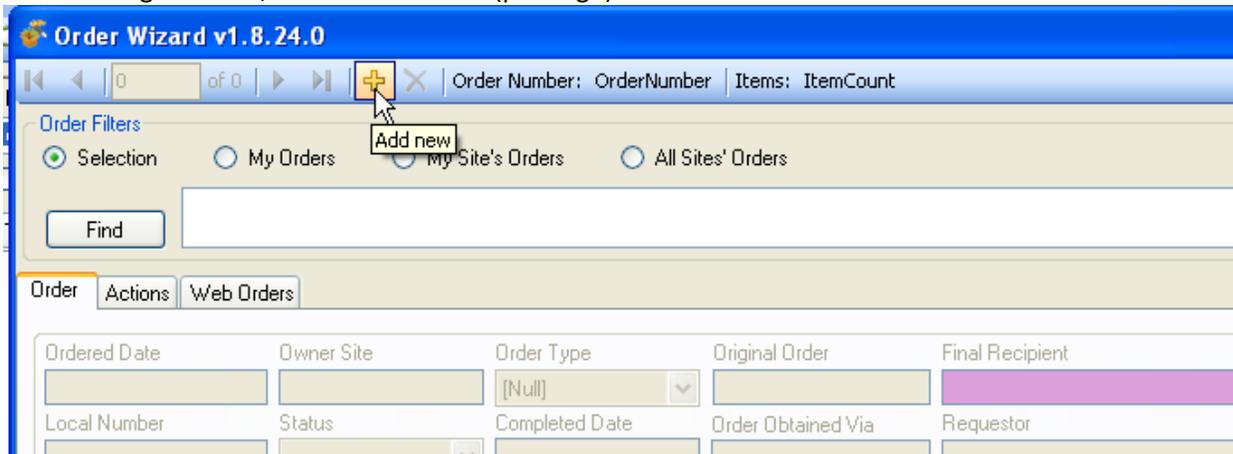
Save frequently, and save often! (when using the Order Wizard). Also, use the Save button when initially creating the order; otherwise you will receive an error message. This is necessary to save the record with the

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]: Two fields: **Feedback**, and **Total Cost** shown in some of these screen captures are not currently being used but are there as place holders awaiting future development.)

Step 5

There are multiple approaches that can be taken to assign inventory to the order. In the following sections, Step 5a through Step 5e, 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 from the Search Tool grid, either accession records or inventory records	Dragging inventory records rather than accession records will give perform somewhat better because when selecting accessions the software does additional processing to select the inventory.							
5c	Drag accession key(s) or inventory key(s) from a spreadsheet	<p>The accession key is comprised of three fields:</p> <table><tr><td>Accession Prefix</td><td>Accession Number</td><td>Accession Suffix</td></tr></table> <p>The wizard will interpret an inventory key based on the four fields:</p> <table><tr><td>Inventory Prefix</td><td>Inventory Number</td><td>Inventory Suffix</td><td>Inventory Type</td></tr></table>	Accession Prefix	Accession Number	Accession Suffix	Inventory Prefix	Inventory Number	Inventory Suffix	Inventory Type
Accession Prefix	Accession Number	Accession Suffix							
Inventory Prefix	Inventory Number	Inventory Suffix	Inventory Type						
5d	Drag an accession record from the CT or the ST	The wizard will find all the inventory related to the accession and will highlight the inventory that is available and ready for distribution.							
5e	Drag an inventory record from the CT or the ST	The wizard will create an order record using the inventory as the basis.							

Step 5a

Use this approach when you know the Accession ID, Name, or Taxon 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).

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, Name, or Taxon into the **Inventory Picker** field. Select the desired inventory row from the Inventory Picker window and then click **OK**:

The screenshot shows the 'Order Wizard v1.8.28.0' application. The 'Inventory Picker' dialog box is open, displaying a table of inventory items. The 'Accession Number' field is highlighted with a red box and contains the text 'mar 73101'. A blue circle with the number '3' is positioned next to the 'Accession Name' field. A blue circle with the number '4' is positioned next to the selected row in the table. A blue circle with the number '5' is positioned next to the 'OK' button. A blue circle with the number '2' is positioned next to the 'New Row' button in the main window.

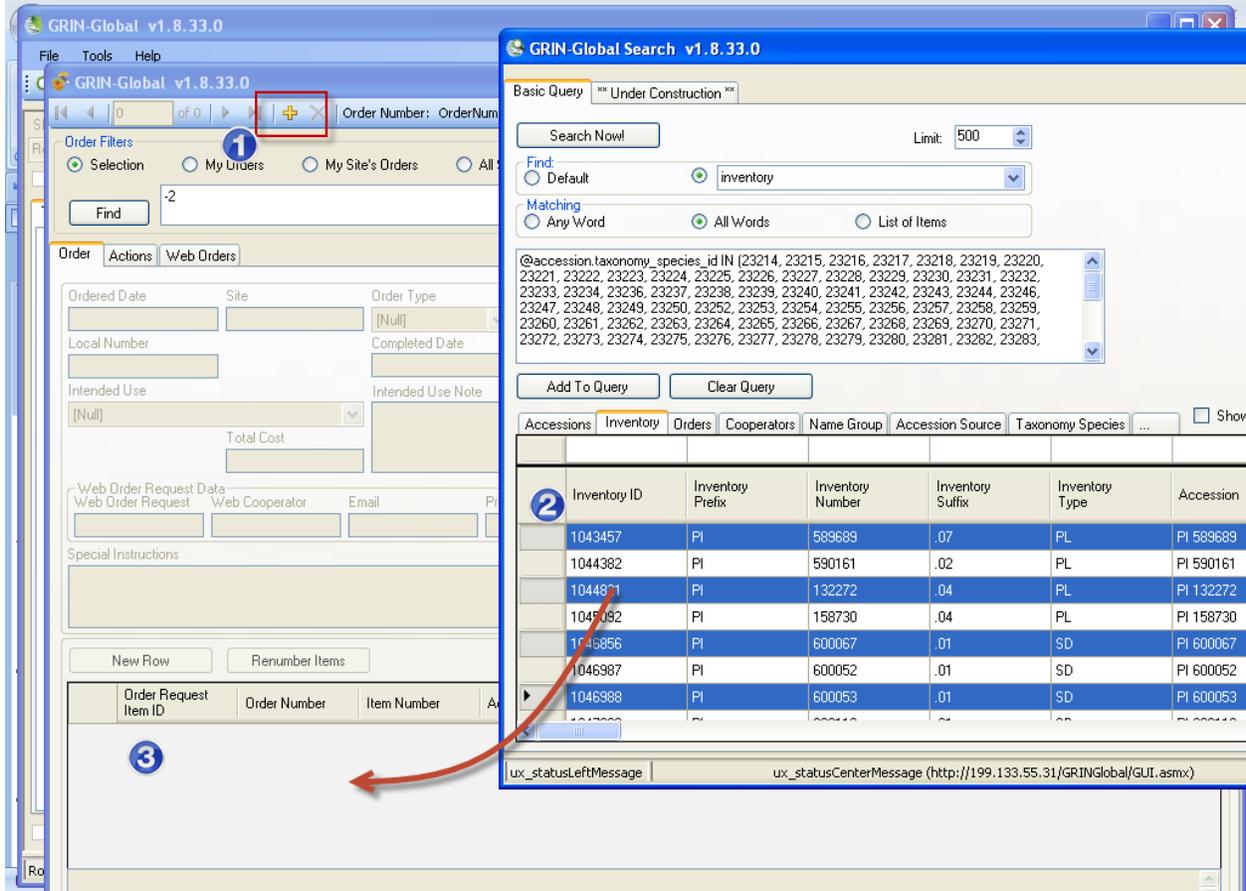
Inventory Prefix	Inventory Number	Inventory Suffix	Inventory Type	Site	Inventory Maintenance Policy	Is Distributable?	Is Available?
mar	73101	01	SD	DBMU	Aronia	Y	N
mar	73101	rei	SD	DBMU	SYSTEM	N	N
mar	73101	rei	SD	DBMU	SYSTEM	N	N
mar	73101	re0905a	SD	DBMU	Aronia	Y	Y
mar	73101	re0906a	SD	DBMU	Aronia	Y	N
mar	73101	re0906c	SD	DBMU	Aronia	Y	N

Order Request Item ID	Order Number	Item Number	Accession	Inventory	Site	Requested Name	Requested Taxon	Geography
30167	56811 - Riget, K...	4	DPRU 472	DPRU 472 PL	DAV		Prunus simonii	Russian F...
30168	56811 - Riget, K...	5	DPRU 707	DPRU 707 PL	DAV		Prunus hybrid	
30169	56811 - Riget, K...	6	PI 318921	DPRU 732 PL	DAV		Prunus domestic...	France
30170	56811 - Riget, K...	7	PI 300259	DPRU 733 PL	DAV		Prunus domestic...	Netherlan...
30171	56811 - Riget, K...	8	PI 132648	DPRU 854 PL	DAV		Prunus domestic...	Germany
30172	56811 - Riget, K...	9	DPRU 857	DPRU 857 PL	DAV		Prunus sp.	
30173	56811 - Riget, K...	10	PI 129635	DPRU 863 PL	DAV		Prunus domestic...	Australia

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 give perform somewhat better because when selecting accessions the software does additional processing to select 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 or Word doc 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).

	Accession Prefix	Accession Number	Acc Suf
3	DPRU	104	
7	DPRU	138	
9	DPRU	438	
1	DPRU	198	
8	DPRU	285	
2	DPRU	375	

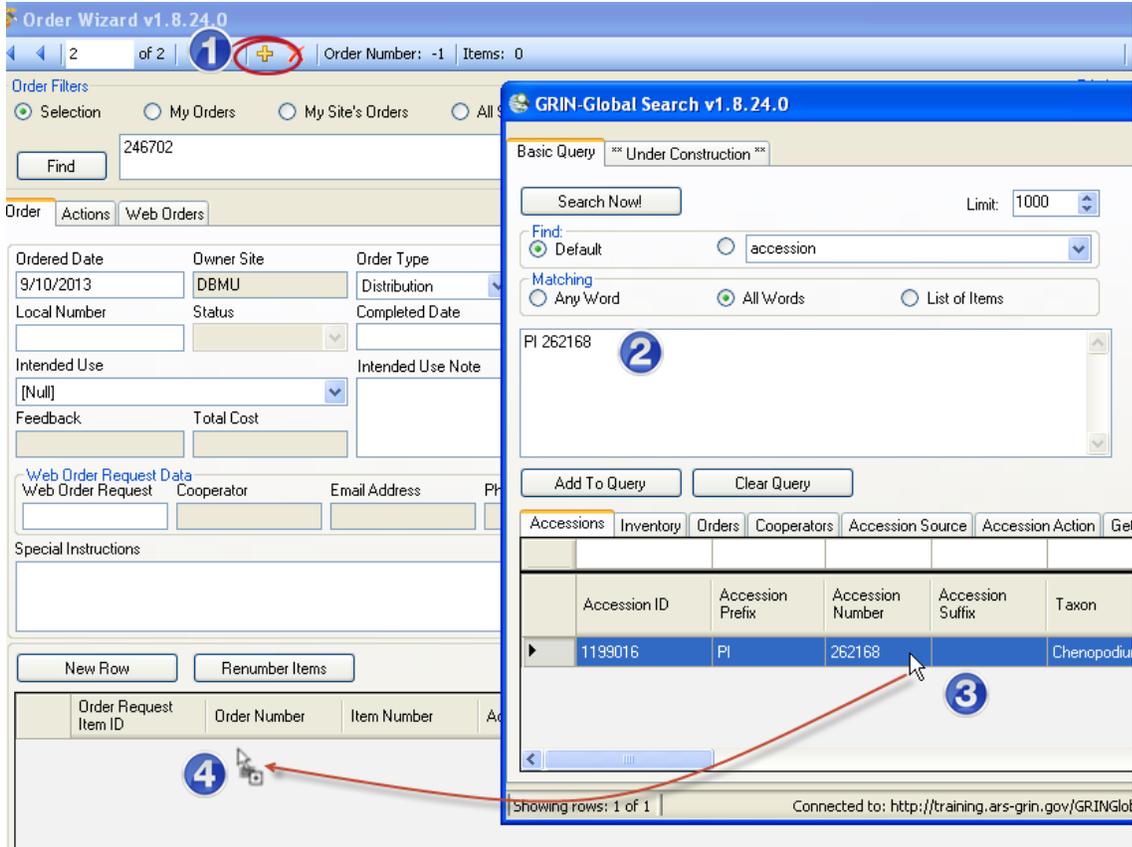
Before dragging into the Order Wizard, click the Add new button in the Order Wizard:

The screenshot shows the 'Order Wizard v1.8.28.0' window. At the top, there are navigation buttons and a status bar showing 'Order Number: -1' and 'Items: 0'. The 'Add new' button is circled in red. Below the navigation is the 'Order Filters' section with radio buttons for 'Selection', 'My Orders', 'My Site's Orders', and 'All Sites' Orders'. A 'Find' button and a search input field are also present. The main 'Order' section contains various input fields for order details. At the bottom, there is a table with the following data:

Order Request Item ID	Order Number	Item Number	Accession	Inventory	Site	Requested Name	Requested Taxon	Geography
-1	-1	1	DPRU 104	DPRU 104 0000...	DAV	Black Heart	Prunus avium	United States, N...
-2	-1	2	DPRU 138	DPRU 138 PL	DAV	Merton Glory	Prunus avium	United Kingdom, ...
-3	-1	3	DPRU 438	DPRU 438 0000...	DAV	Satsuma	Prunus salicina	United States, W...
-4	-1	4	DPRU 198	DPRU 198 0000...	DAV	F8 15-37	Prunus webbii	United States, Ca...
-5	-1	5	DPRU 285	DPRU 285 PL	DAV	ELB-3-DHaploid	Prunus persica	United States, W...

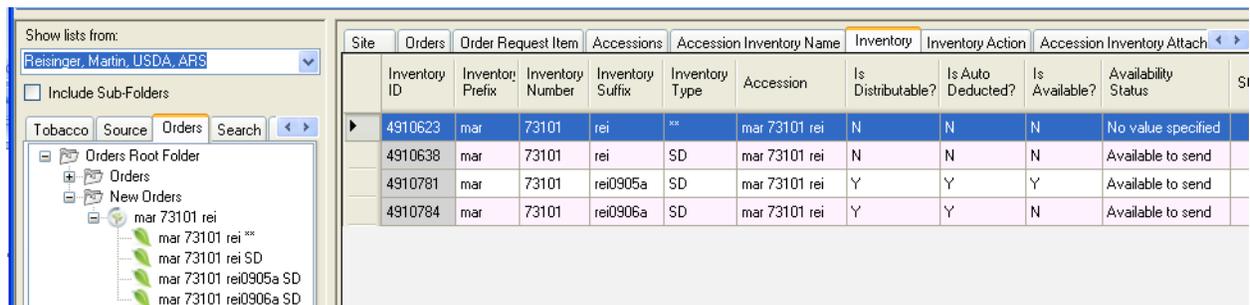
Step 5d: Dragging an Accession Row

Alternatively, you can select an Accession record via the Search Tool or from the CT, and then drag the accession 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.

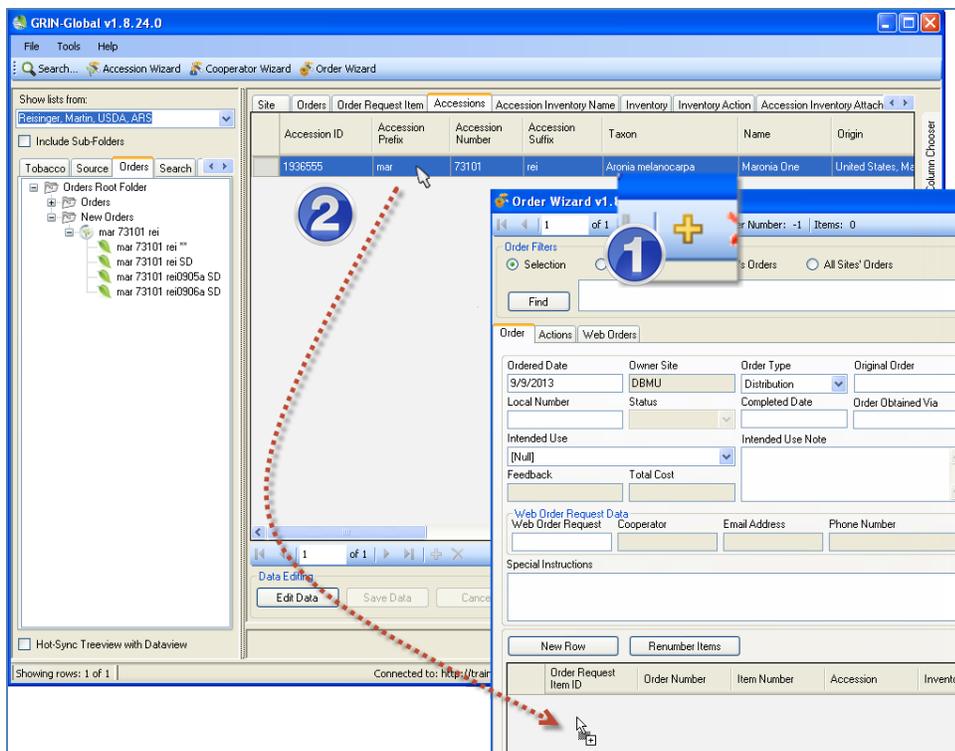


When coming from the CT, remember to drag the record from the grid, not the item from the list in the left panel.

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)



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 5e: Dragging Inventory

You can also drag an inventory record *from the Curator Tool data grid* or the Search Tool grid 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.

When coming from the CT, remember to drag the inventory record from the grid, not the item from the list in the left panel.

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

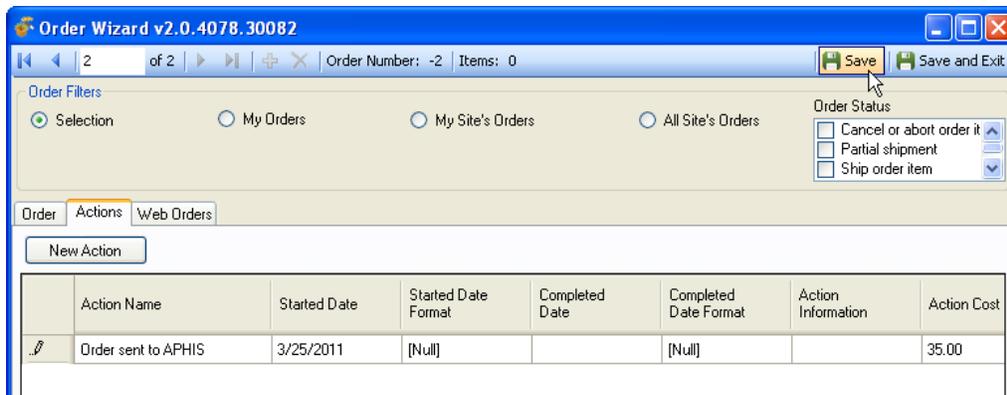
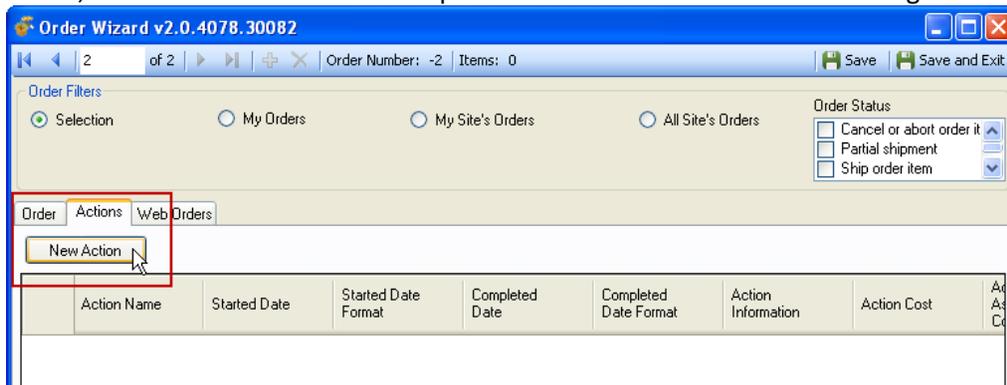
Click the **Save and Exit** button to save your order and to exit the wizard.

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. 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. In fact, 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:



[tbd]

Order shipped vs. Completed in-house order

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 246723

Order Actions Web Orders

Ordered Date: 3/7/2010 10:00 AM Owner Site: Order Type: Distrib Original Order: Final Recipient: Barbara P...

Special Instructions: please send aspa

New Row Renum Items

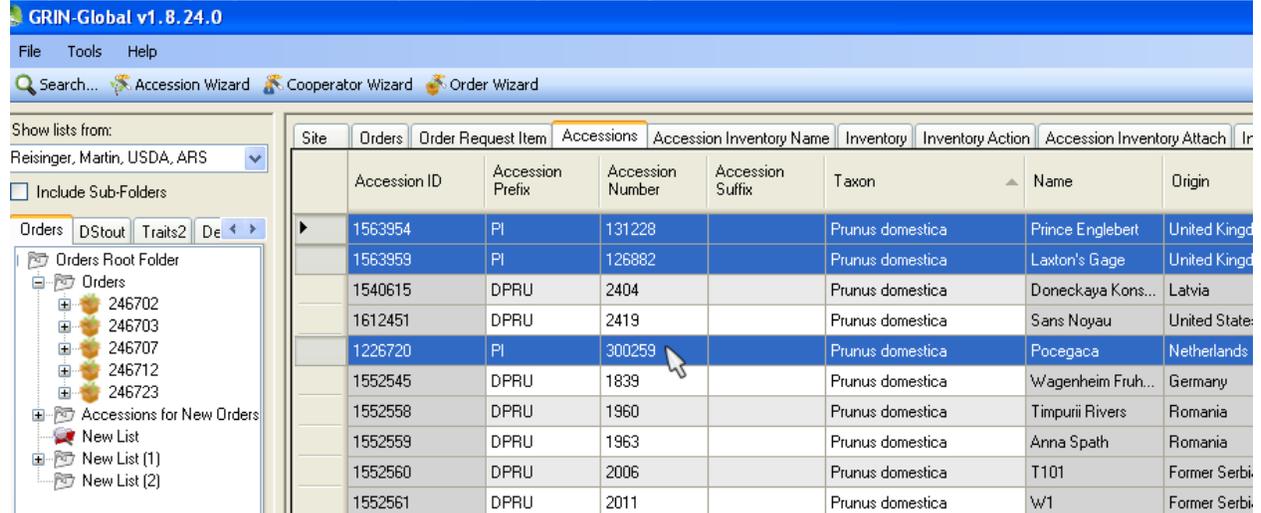
Order Request Item ID	Order Number	Item Number	Accession	Inventory	Requested Name
7669853	246702 - Zilinska...	1	mar 73101 rei	mar 73101 rei090...	Maronia One

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.

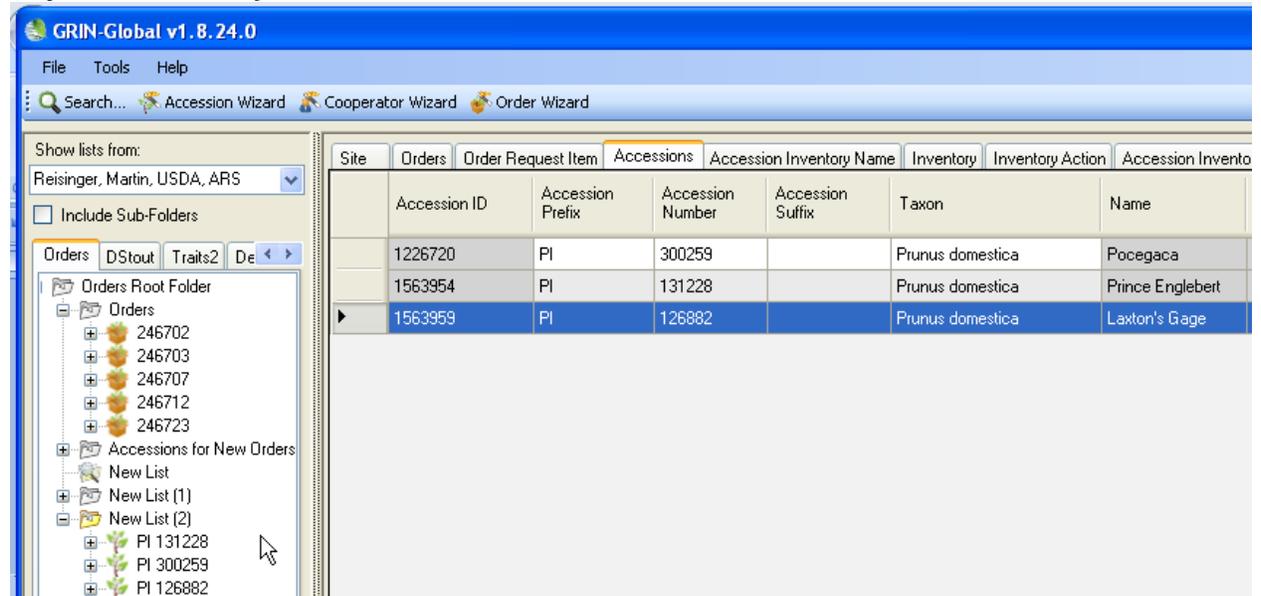
Step 1: Select specific accession (or inventory records)



The screenshot shows the GRIN-Global v1.8.24.0 interface. The 'Accessions' dataview is active, displaying a table of records. The table has columns for Accession ID, Accession Prefix, Accession Number, Accession Suffix, Taxon, Name, and Origin. The record with Accession ID 1226720 and Accession Number 300259 is highlighted.

Accession ID	Accession Prefix	Accession Number	Accession Suffix	Taxon	Name	Origin
1563954	PI	131228		Prunus domestica	Prince Englebert	United Kingdom
1563959	PI	126882		Prunus domestica	Laxton's Gage	United Kingdom
1540615	DPRU	2404		Prunus domestica	Doneckaya Kons...	Latvia
1612451	DPRU	2419		Prunus domestica	Sans Noyau	United States
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 Serbia
1552561	DPRU	2011		Prunus domestica	W1	Former Serbia

Step 2: Make a List of these Accessions

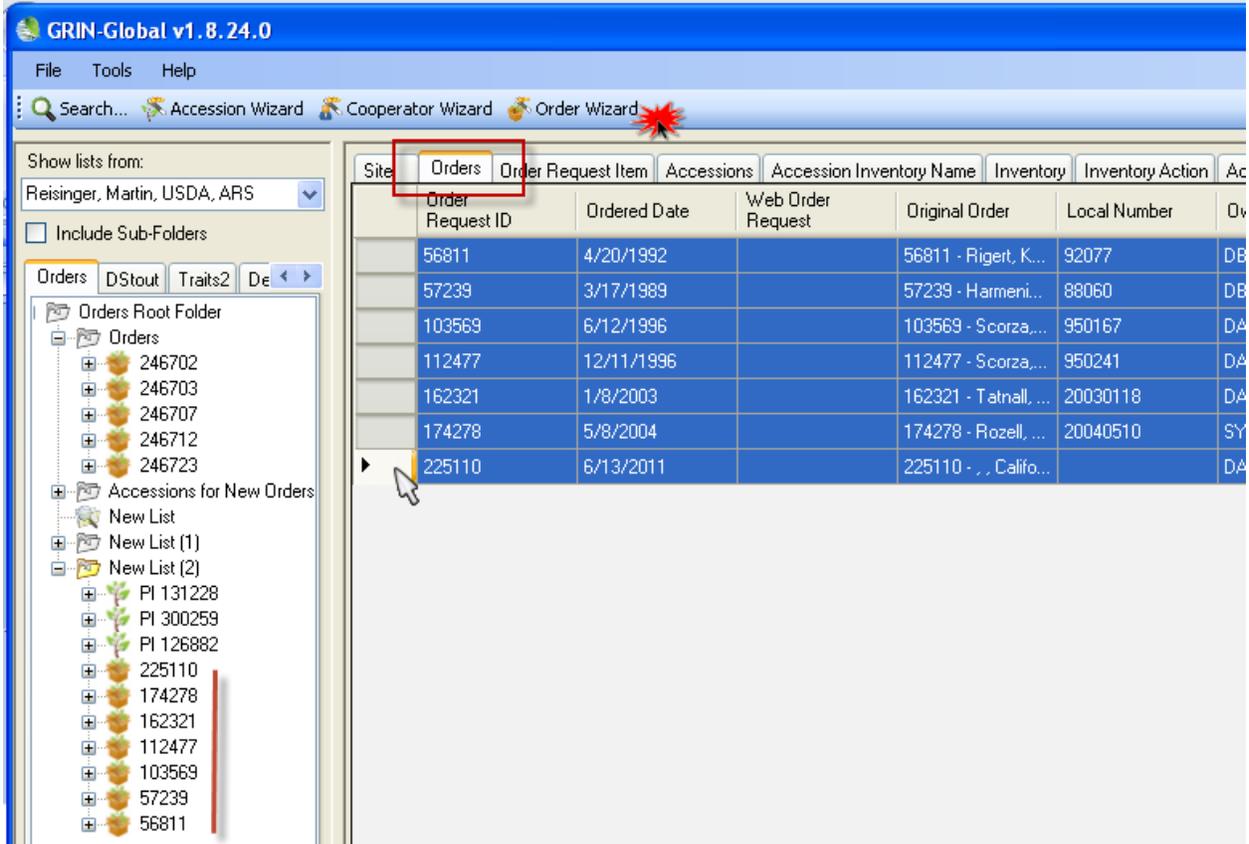


The screenshot shows the GRIN-Global v1.8.24.0 interface. The 'Accessions' dataview is active, displaying a table of records. The record with Accession ID 1226720 and Accession Number 300259 is highlighted. The 'Orders' dataview is also active, displaying a table of records. The record with Accession ID 1563959 and Accession Number 126882 is highlighted.

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

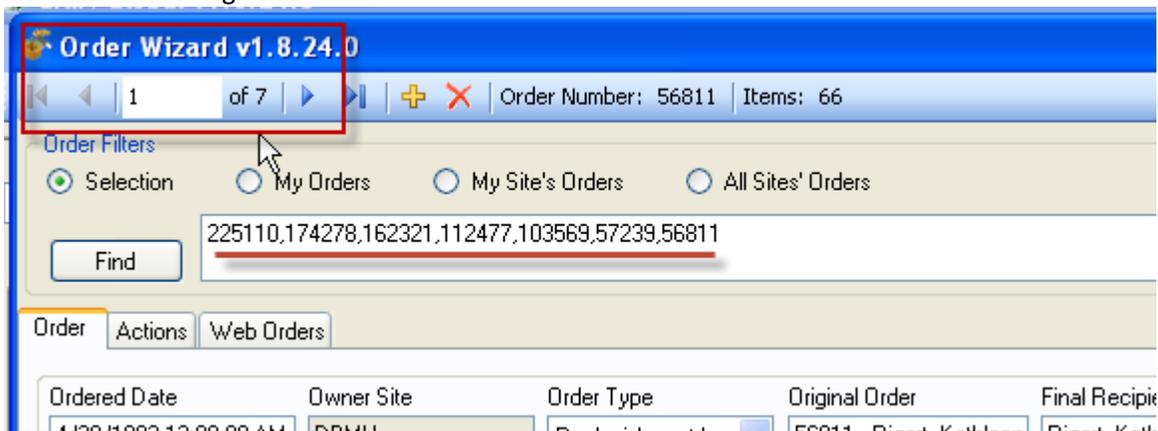
Step 3: Open the Order Request dataview

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

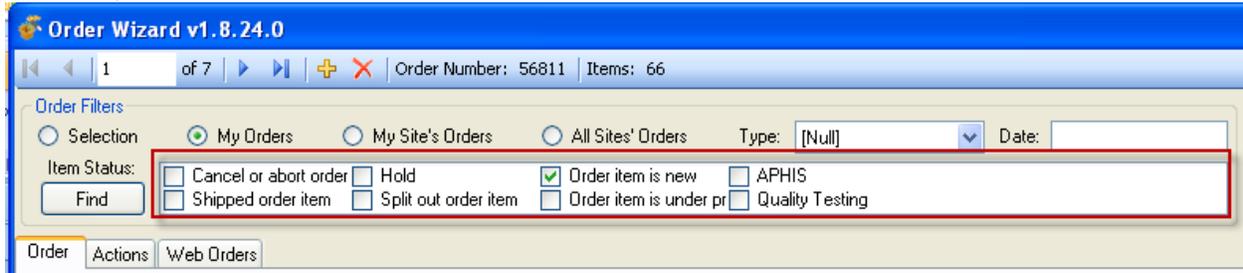
The Order Wizard has several available filters.

Selection

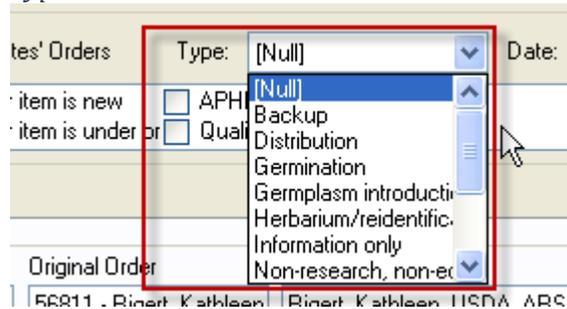
See the *Selecting Records before Starting the Order Wizard* section for details.

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

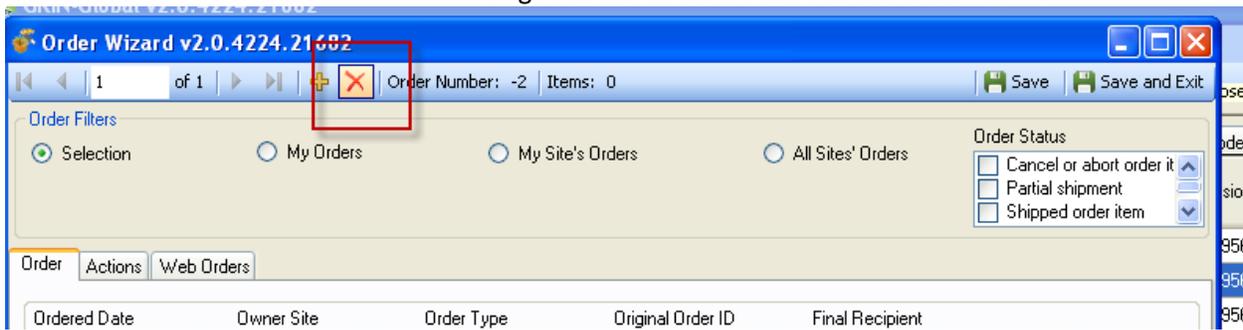


Date

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:



Web Orders

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.

The screenshot shows the 'Order Wizard v1.8.30.0' window. At the top, there are 'Web Order Filters' with radio buttons for 'My Web Orders', 'My Site's Web Orders', and 'All Sites' Web Orders'. Below that, 'Web Item Status' has checkboxes for 'Accepted Order', 'New Order', and 'Canceled Order'. A 'Web Find' button is also present. The 'Web Orders' tab is selected in the navigation bar, which shows '1 of 4' records. Below the navigation bar are buttons for 'Create New Order Request' and 'Create New Cooperator'. The main area displays a table of web order items:

Web Order Request ID	Ordered Date	Status	Intended Use	Web Cooperator
76	9/17/2013 10:09:42	New Order	Other	reisinger, martin, usda

Below the table, there are fields for 'Address Line 1', 'Address Line 2', 'Address Line 3', 'City', 'Postal Index', and 'Geography'. A 'Note' field contains the text: 'I really like plants. Research use notes - I will need these asap'. At the bottom, there is a 'Web Order Items' table:

Web Order Request Item ID	Cooperator	Web Order Request	Item Number	Accession	Site	Name	Taxon	Geography
637	reisinger, martin, ...	76	13	PI 618393	CDR	Rosborough	Rubus hybr.	United States, Te...
639	reisinger, martin, ...	76	15	PI 618582	CDR	Glen Moy	Rubus idaeus	United Kingdom, ...
635	reisinger, martin, ...	76	11	PI 604610	CDR	IDAEOBATUS	Rubus innominatus	China, Jiangxi
636	reisinger, martin, ...	76	12	PI 604610	CDR	IDAEOBATUS	Rubus innominatus	China, Jiangxi

In the example above, there are four new web orders. 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 **Create New Cooperator** 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:

The screenshot shows the 'Order Wizard' interface with a 'Cooperator Missing' dialog box open. The dialog box contains the following text:

The recipient in this web order is not listed in the Cooperator Table.

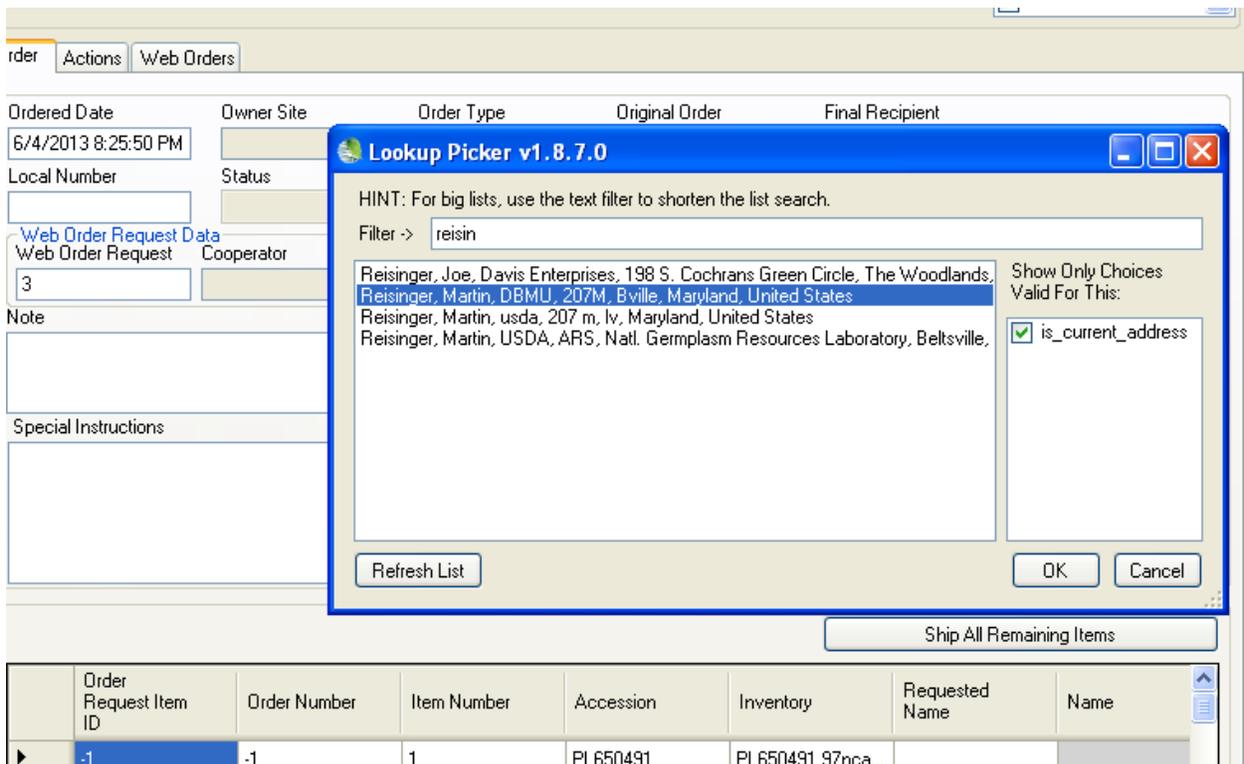
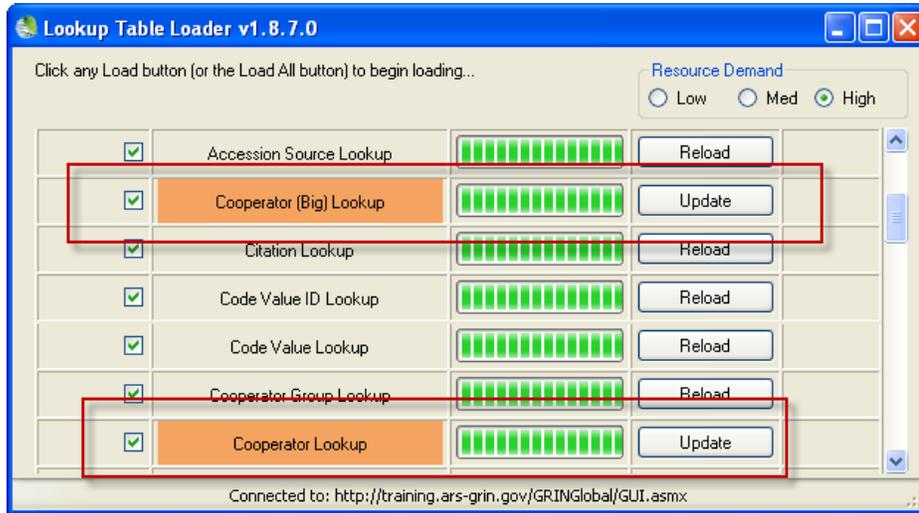
Would you like to create a new Cooperator now?
(Clicking Yes will create the Cooperator and add it to the new Order Request. Clicking No will create the Order Request with Final Recipient left blank).

Buttons for 'Yes' and 'No' are at the bottom of the dialog.

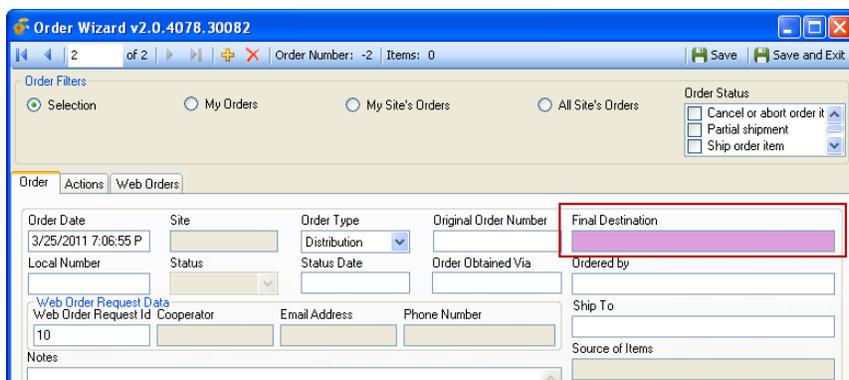


If the **Create New Cooperator** button is clicked when processing the web order, you will have an opportunity to generate a standard cooperator from the user's web cooperator information.

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

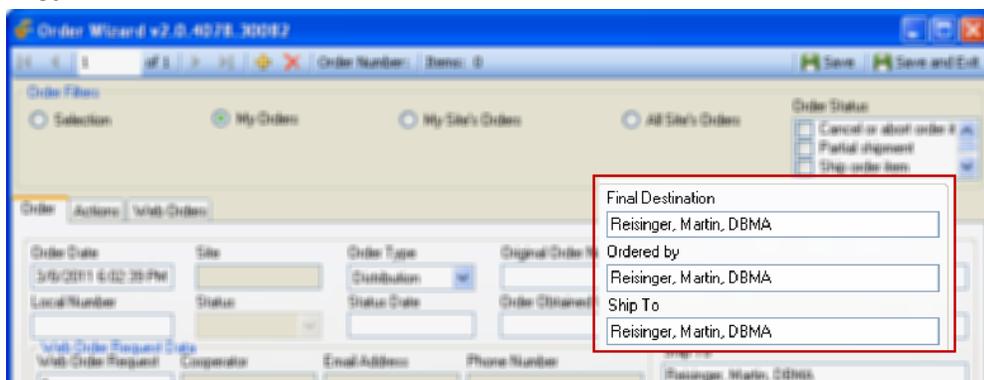


A blank **Final Destination** field is the result of answering **No** to the choice when prompted to create a new cooperator:



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:

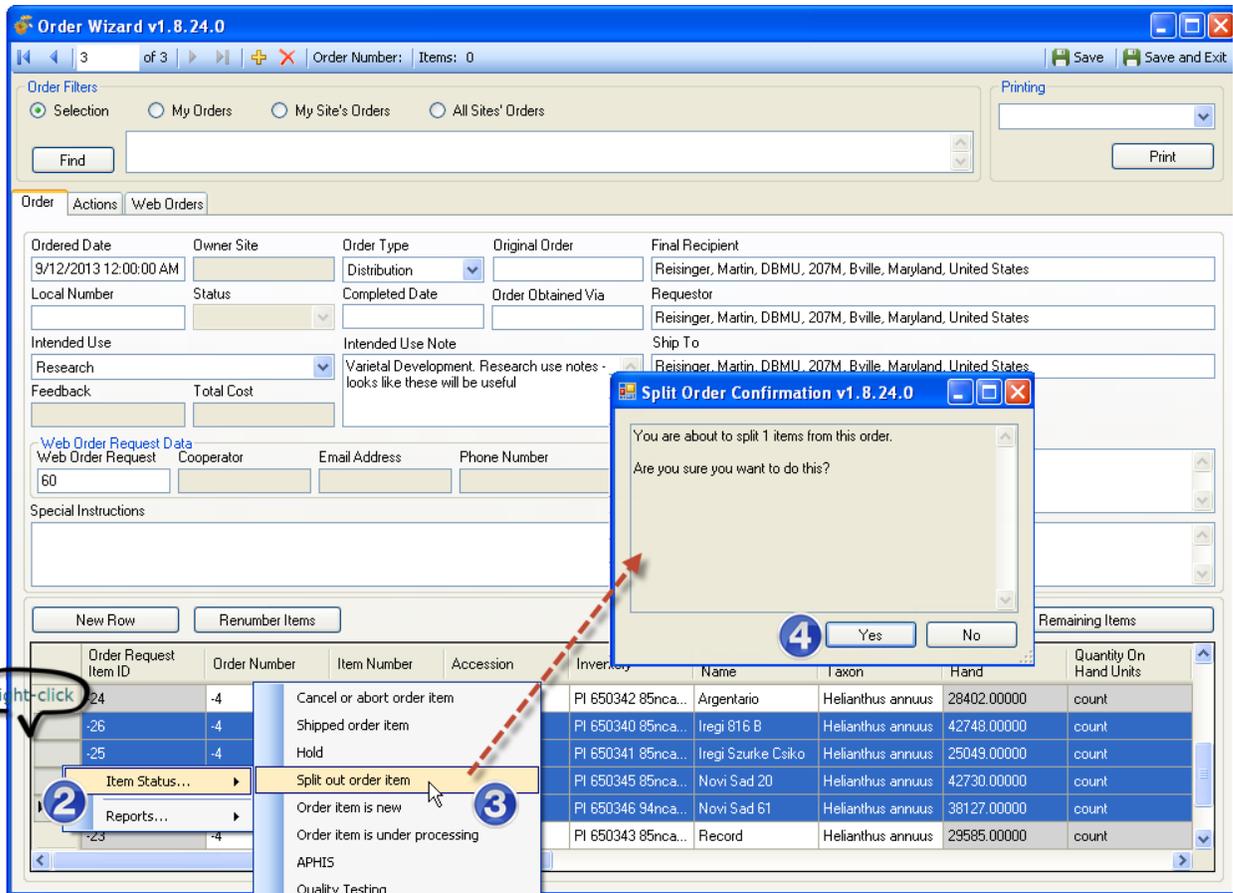


Splitting an Order

For various reasons you may need to split an order: some of the germplasm on the order may not be available so a decision is made to send what is ready and move the remaining unavailable germplasm to a new order (to be processed at a later date). Another reason (at least in the current system), is that an incoming web order that impacts multiple sites comes in on one order – a site could move its accessions from the incoming multiple order and create a new order for just their site's accessions.

How to Split an Order

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



Reports

Packing slips, picking slips, and other order-related reports may be launched from the Order Wizard grid. Select rows in the grid; right-click; click Reports..., and then select the desired report.

