Assignment 5:
Homework for the NPGS GRIN-Global before Webinar 6

Revision Date
October 20, 2015

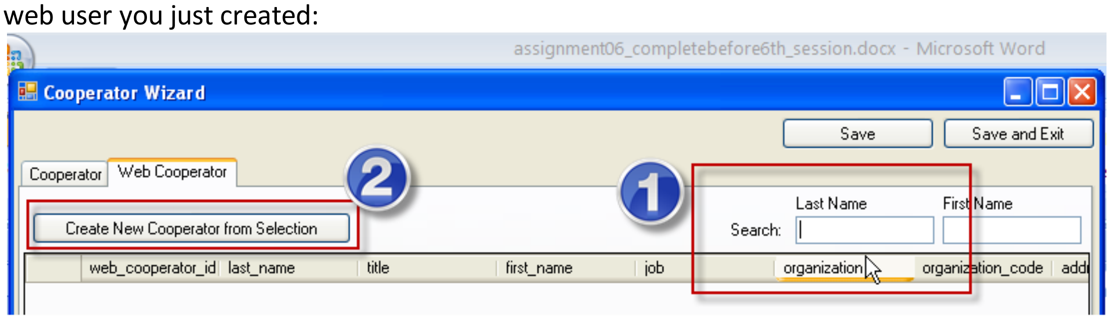
This exercise should be completed before you attend
the 6th webinar session.

1. Cooperator Wizard

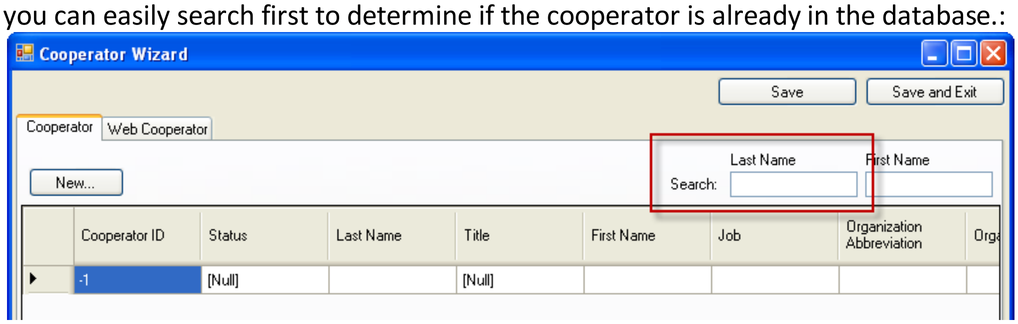
a. Practice converting a web cooperator into a standard cooperator.

First , use the Public Website to create a Web User. Start from the Register Now blink:

In the Curator Tool (CT), start the Cooperator Wizard, and follow through by first searching for the web user you just created:



b. Practice making a new cooperator from “scratch.” This is also fairly straightforward, as you are inputting as you do in any dataview. However, the advantage of using the cooperator wizard is that you can easily search first to determine if the cooperator is already in the database.:



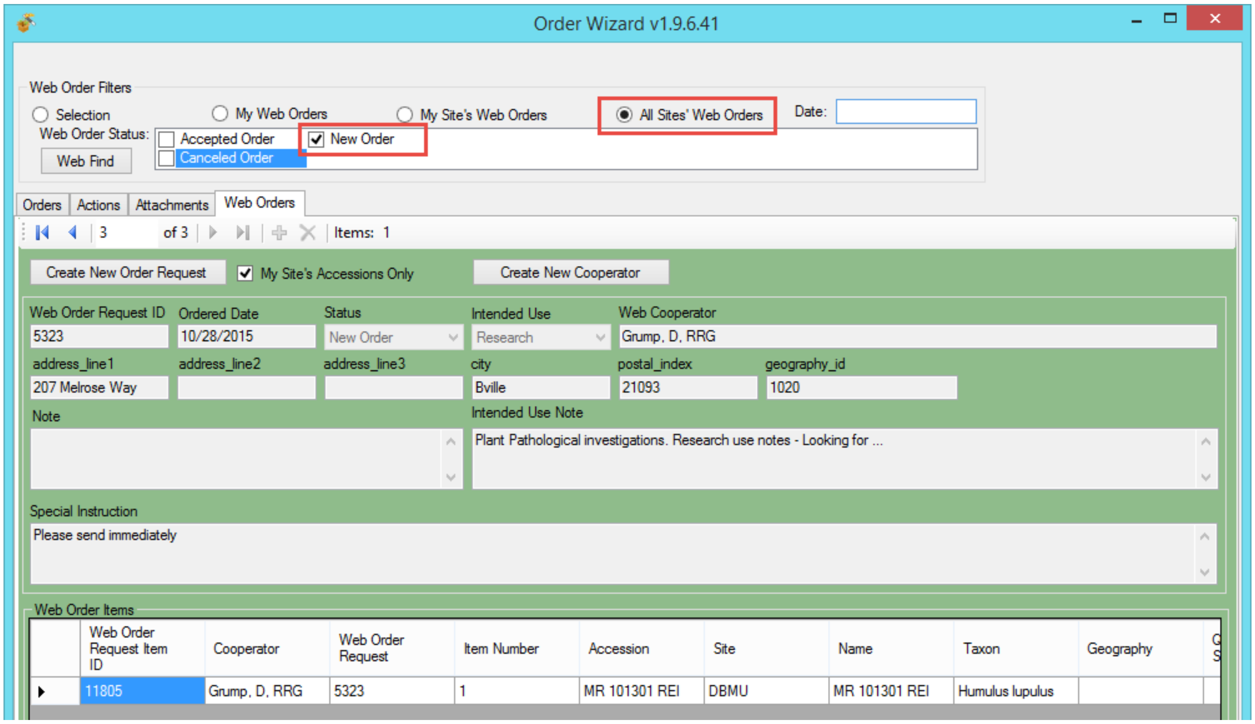
Note

The Wizard currently can be used to create individual cooperator accounts, not institutional accounts. A cooperator can be a person or an organization, but the Wizard requires a **Last Name** field to be filled, whereas in an organization coop, that field remains empty.

2. Order Wizard –Converting a Web Order to a Standard Order

a. Practice converting a web order into a standard order. This means that you must first act as Public Website user, and create an order. Be sure to login the website before adding to your cart. Proceed with the order, selecting some germplasm that is available.

In the Curator Tool, start up the Order Wizard and switch to the Web Order tab. Use the All Sites' Web Orders button and be sure **New Order** is checked.

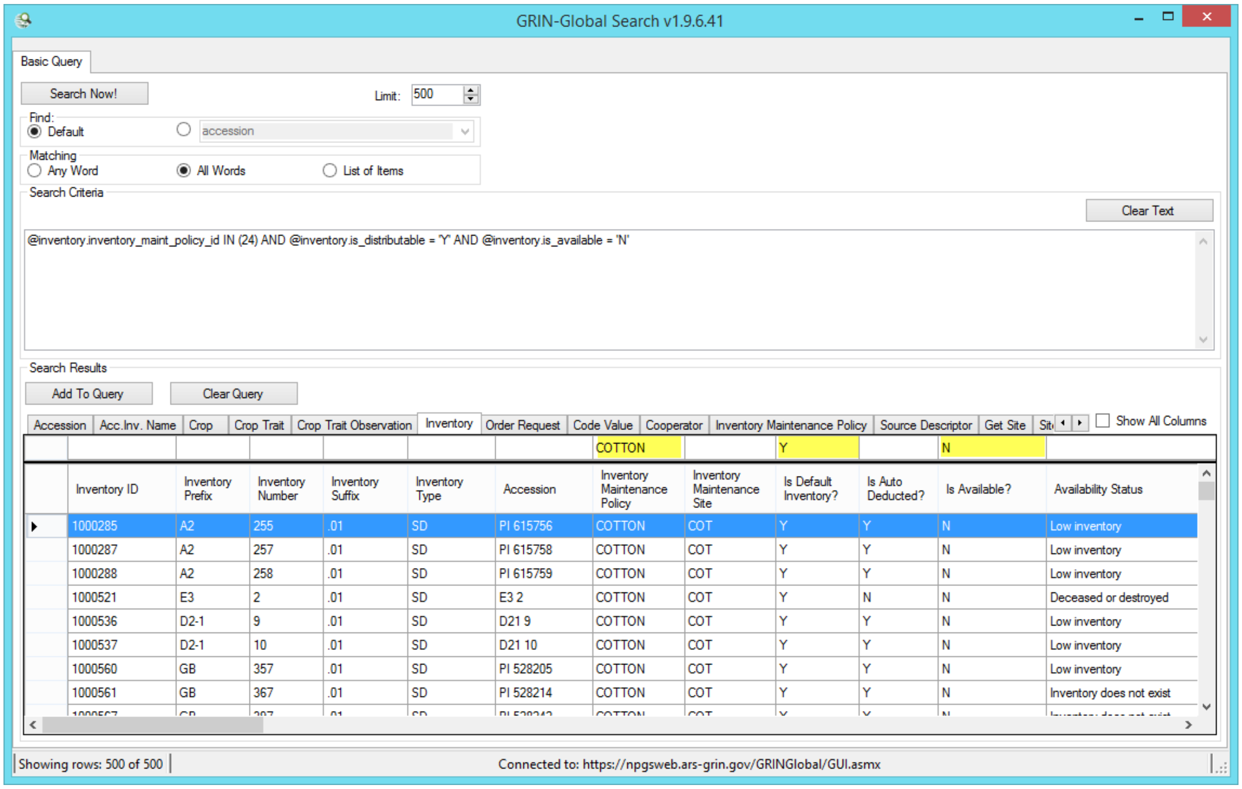


Click on the **Create New Order Request** button to make the standard order.

2. Order Wizard – Using the OW to Create New Inventory for Regeneration

A complete, step-by-step description of this process is described in the online Inventory document. Please refer to that, especially on the ***Regenerating Inventory*** section.

b. Open the CT and the Search Tool (ST). In the ST, search for inventory that **Is Default Inventory?** , but not Available. As an example, I will use Inventory managed by the Inventory Maintenance Policy named "COTTON." You could follow this example and use the same inventory, or adjust this exercise to inventory with which you are familiar.

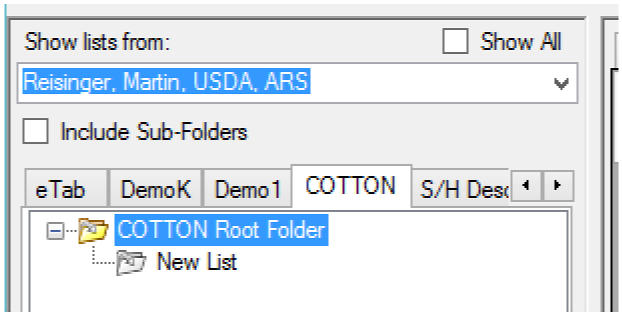


Here is an another example of a dynamic folder query that could be used to search for inventory that is “Low”:

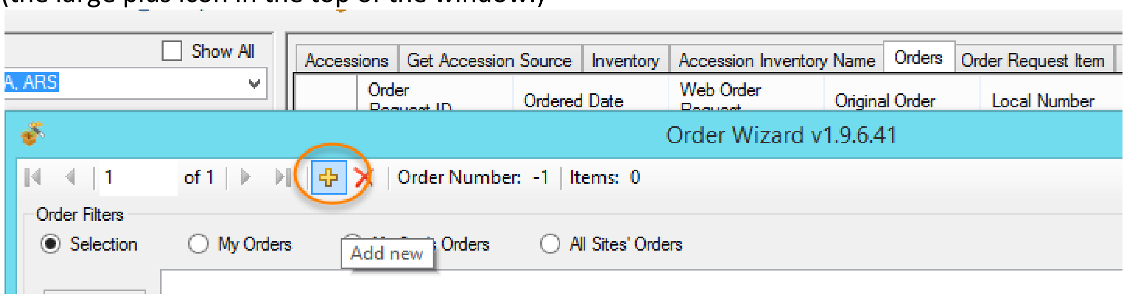
@inventory_maint_policy.maintenance_name LIKE 'MAR%' AND
@inventory.availability_status_code = 'LOW' AND
@inventory.form_code_type = ‘SD’

a. In this next step, you will drag an Inventory record from the Search Window into the CT’s Order Wizard window.

Go to the CT; start a new tab with an empty folder (here shown as “COTTON”):

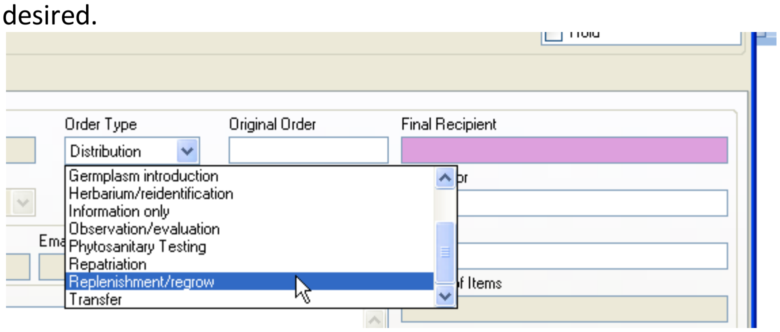


Click the **Order Wizard** button; in the Order Wizard window, click the wizard's **Add New** button (the large plus icon in the top of the window.)

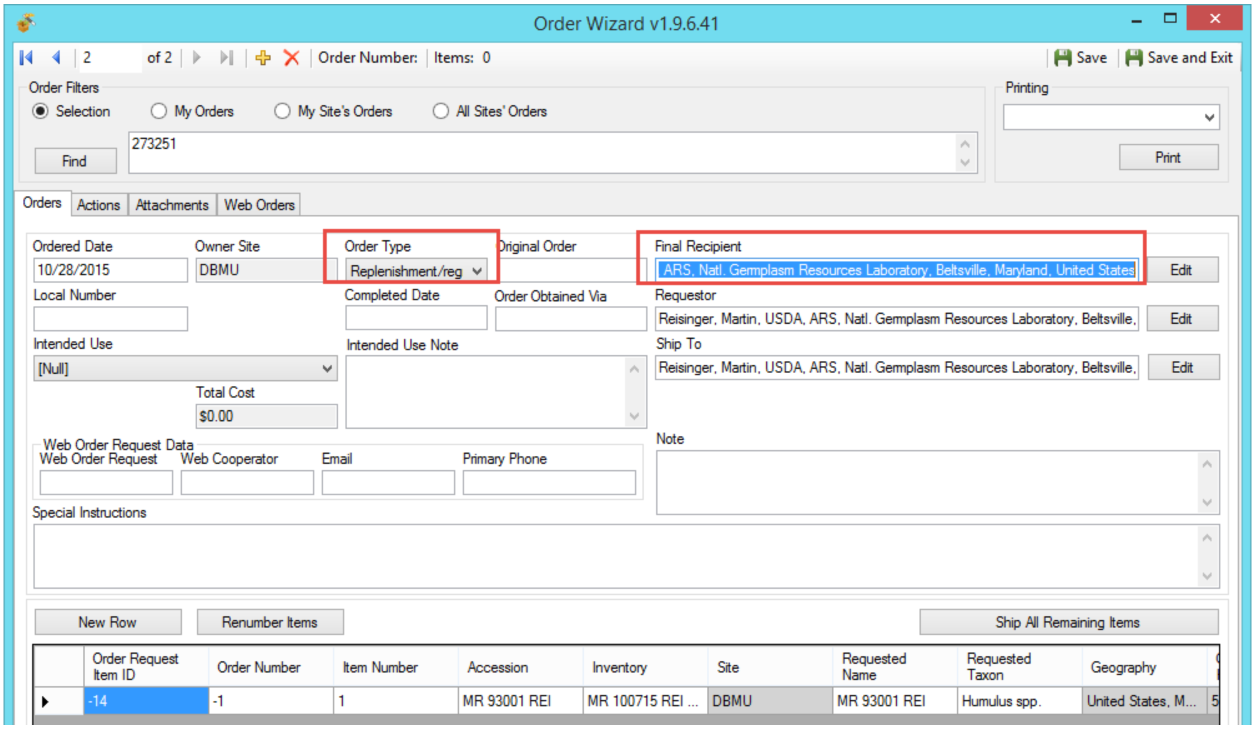


Next, from the Search Tool window, drag one of the found records into the grid at the bottom panel of the **Order Wizard** window.

You will need to change the **Order Type** using its dropdown, to "Replenishment/regrow." Also select the **Final Recipient** (select a cooperator from the lookup list). You must begin by *typing* in the **Final Recipient** box. **Requestor** and **Ship To** will also fill in. These can also be overridden if desired.



Input a **Quantity Shipped** (for this exercise, just use a very small number such as "2" for this exercise) and then click the **Ship All Remaining Items** button; click **Save and Exit**.



b. In the CT. you should now see this order in the list, and if you have the Orders tab displayed you will see the order.

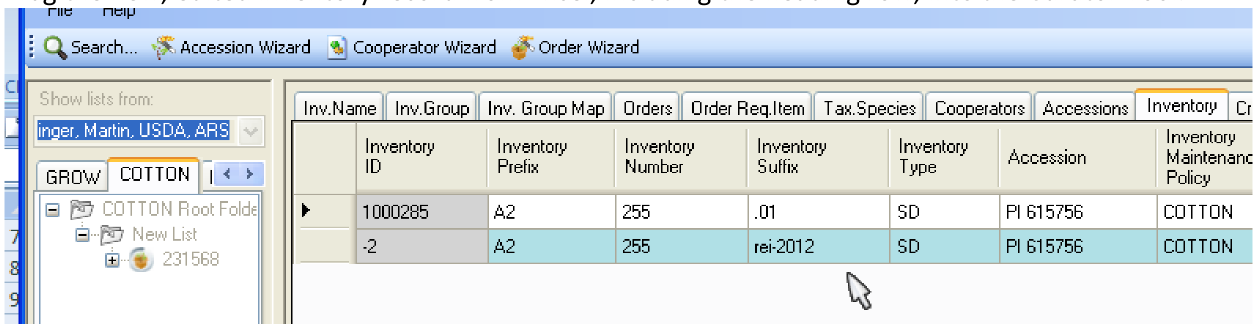
c. At this point, you will create a new inventory record in the CT, since the result of the replenishment order will be, of course, new inventory.

Again, the “how-to” details for this are in the online [Inventory]document.

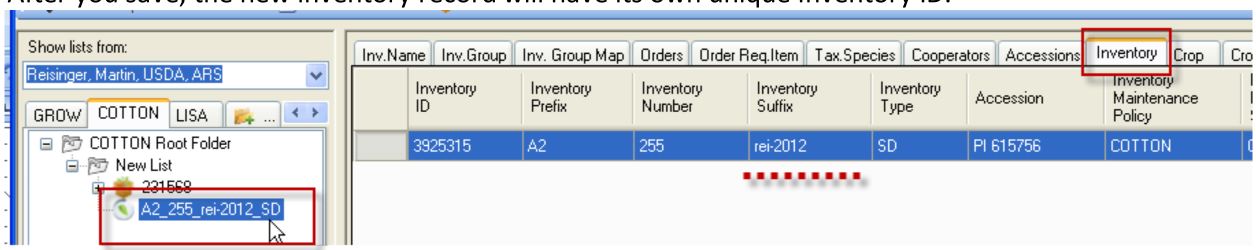
Drag the original *inventory* record from the Search Tool into Excel. Modify it in Excel so that you can use this to be the new inventory record. Delete the Inventory ID field, since the new record will get a new unique ID after it is brought back into the CT. Use your site’s naming conventions to name the new inventory. Review the rest of the fields, to determine if they apply to this new inventory. Some fields, such as Location, should be emptied, because you do not have that information yet.

In the CT, switch to the Inventory dataview, and click the **Edit** button (to invoke Edit mode).

Drag the new, edited inventory record from Excel, including the heading row, into the Curator Tool.



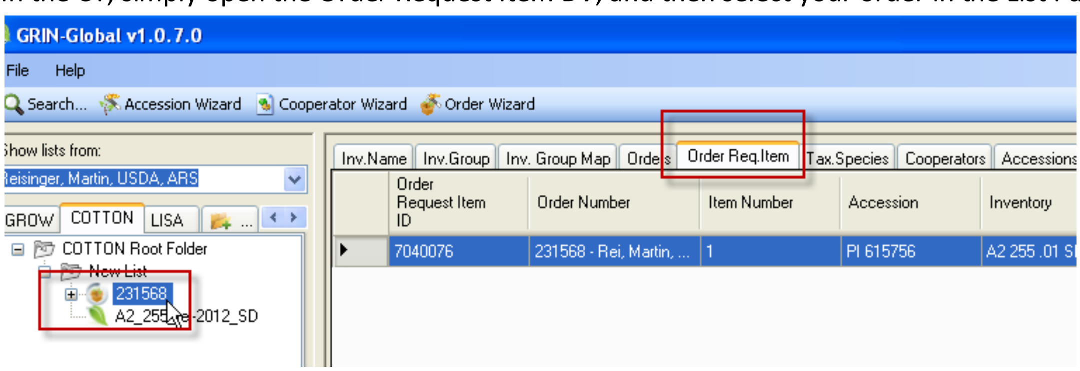
After you save, the new inventory record will have its own unique Inventory ID.



Deleting Orders

In the webinar, we didn't talk about deleting Orders. If you decide to delete an order, you must manually delete the Order's children (the Order Request Items). (This is true for any "parent" record. You cannot delete a parent and leave orphans behind. Example: An accession source record is the child of an accession record. In order to delete an accession record that has an associated source record, you would need to delete the source record first. Fortunately, in a production system, deleting records is not much of an issue, since records are usually maintained for historical reference.)

In the CT, simply open the Order Request Item DV, and then select your order in the List Panel.



d. In Edit mode you can delete the Order Request Items. Only after completely deleting all of the Order Request Items can you delete the Order.

3. Reports

Practice generating reports. Please refer to the Reports section in the Curator Tool User Guide. Currently there are seven reports that have been designed – more will be forthcoming to meet the NPGS needs.

In the Curator Tool, select Inventory or Accession records that have inventory; then display the Packing Slip dataview. Select records in the dataview grid, and right-click to select **Reports...** from the menu: