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

Revision Date
March 30, 2012

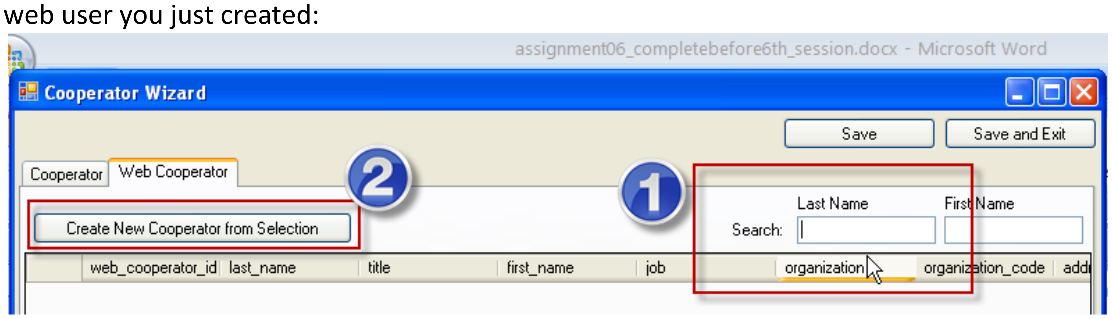
This exercise should be completed before you attend
the 6th webinar session.

1. Cooperator Wizard

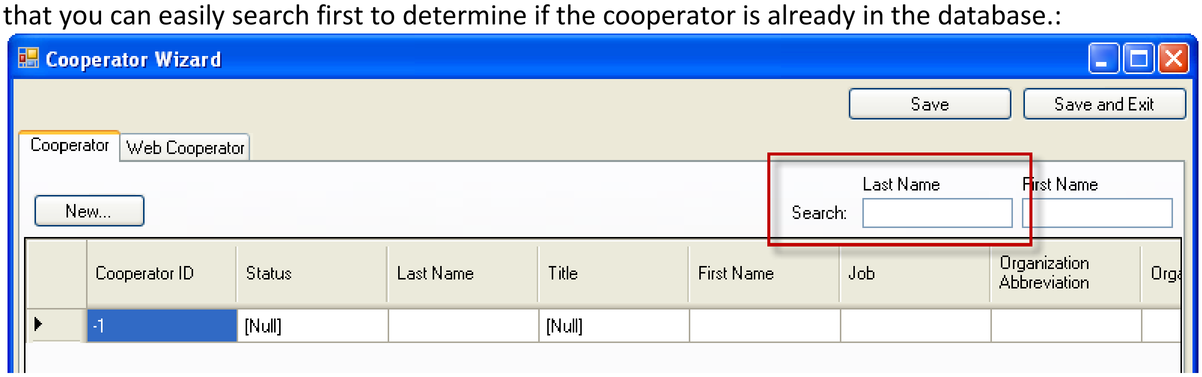
a. Practice converting a web cooperator into a standard cooperator.

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

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



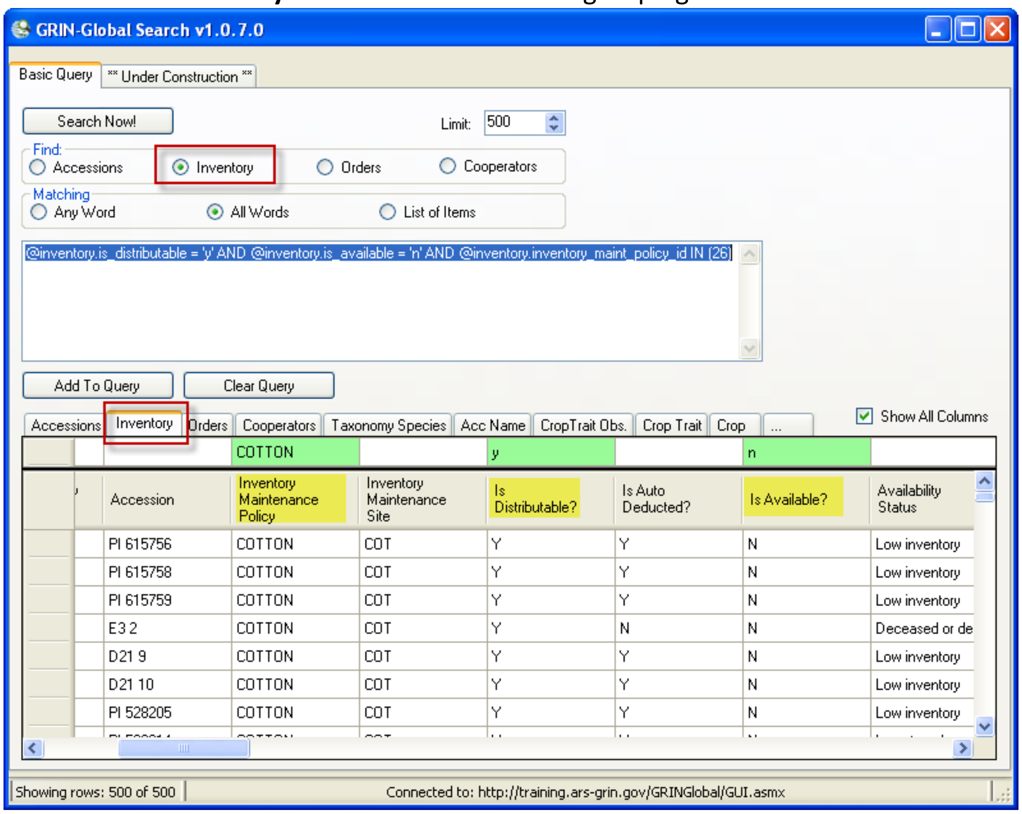
b. Practice making a new cooperator from "scratch." This is also fairly straightforward, as you are inputting as you do in any dataview. However, the advantage of using the cooperator wizard is that you can easily search first to determine if the cooperator is already in the database.:



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

a. Open the CT and the ST. In the ST, search for inventory that is Distributable, 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.

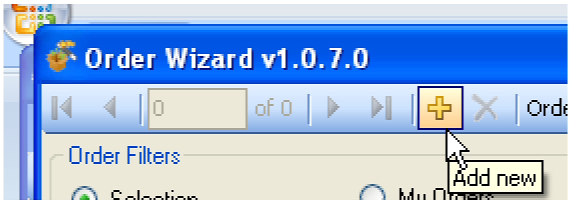
Note: use the **Inventory** radio button in the **Find** grouping as shown.



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

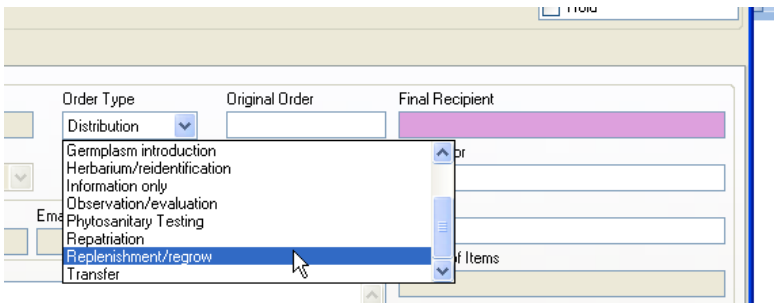
Go to the CT; start a new **NewOrders** tab with an empty folder:

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

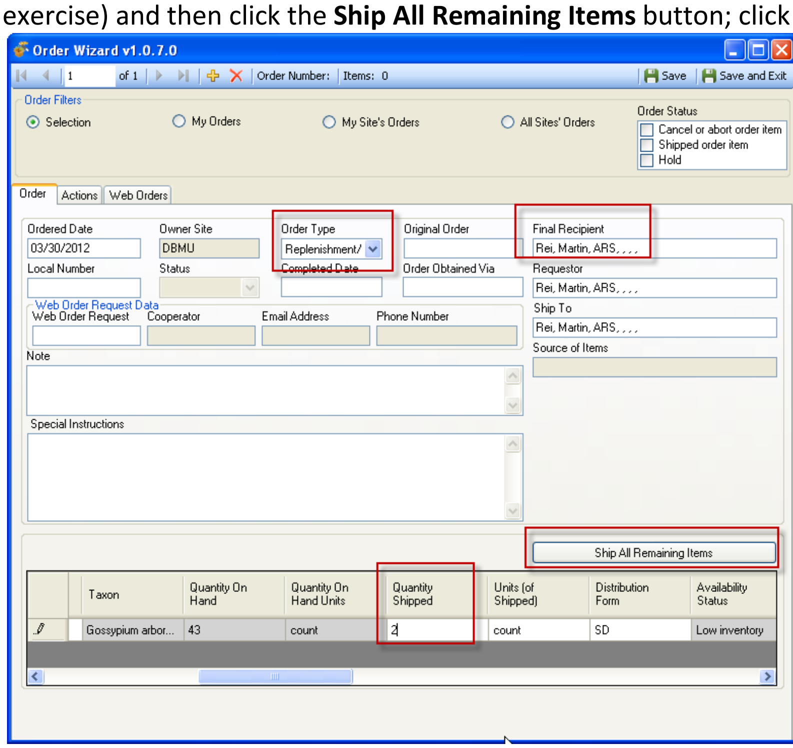


Next, from the Search Tool window, drag one of the found records into the **Order Wizard** window.

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**.



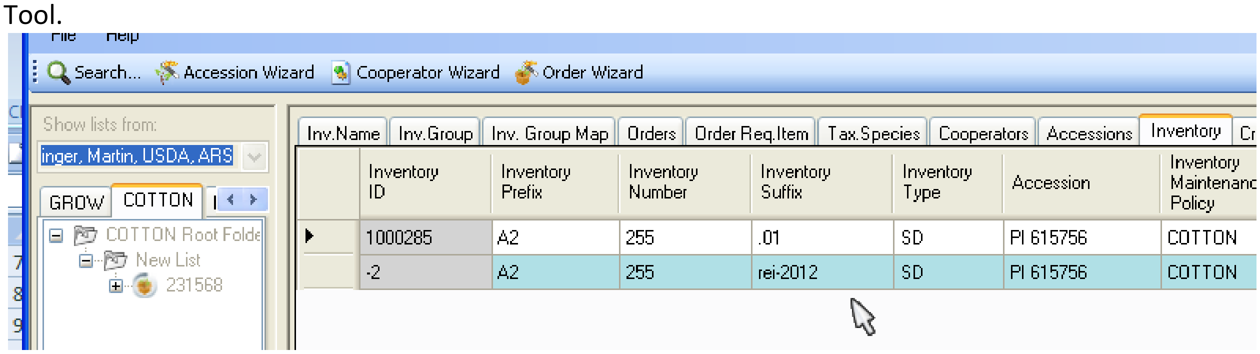
c. In the CT. you should now see this order in the list, and if you have the Orders tab displayed you will see the order.

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

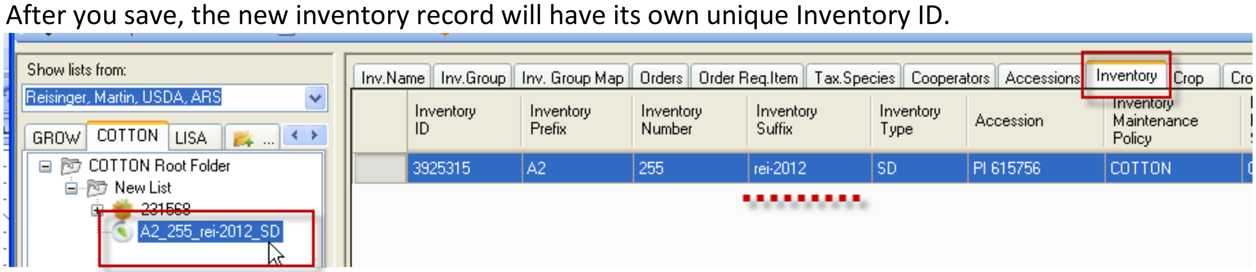
Drag the original inventory record from the Search Tool into Excel. Modify it in Excel so that you can use this to be the new inventory record. Delete the Inventory ID field, since the new record will get a new unique ID after it is brought into the CT. Use your site's naming conventions to name the 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 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.

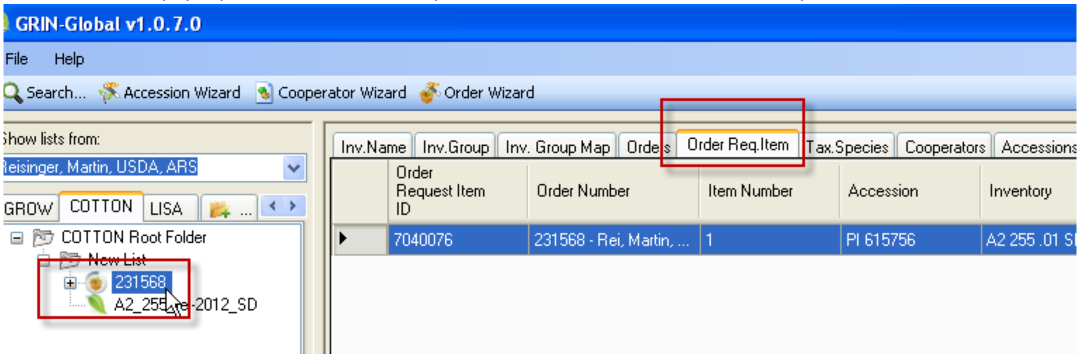


After you save, the new inventory record will have its own unique Inventory ID.



e. In the webinar, we didn't talk about deleting Orders. Currently there is a bug – the Order Wizard did handle deleting Orders (and will again!) In the meantime, if you decide to delete an order, you must manually delete the Order's children (the Order Request Items).

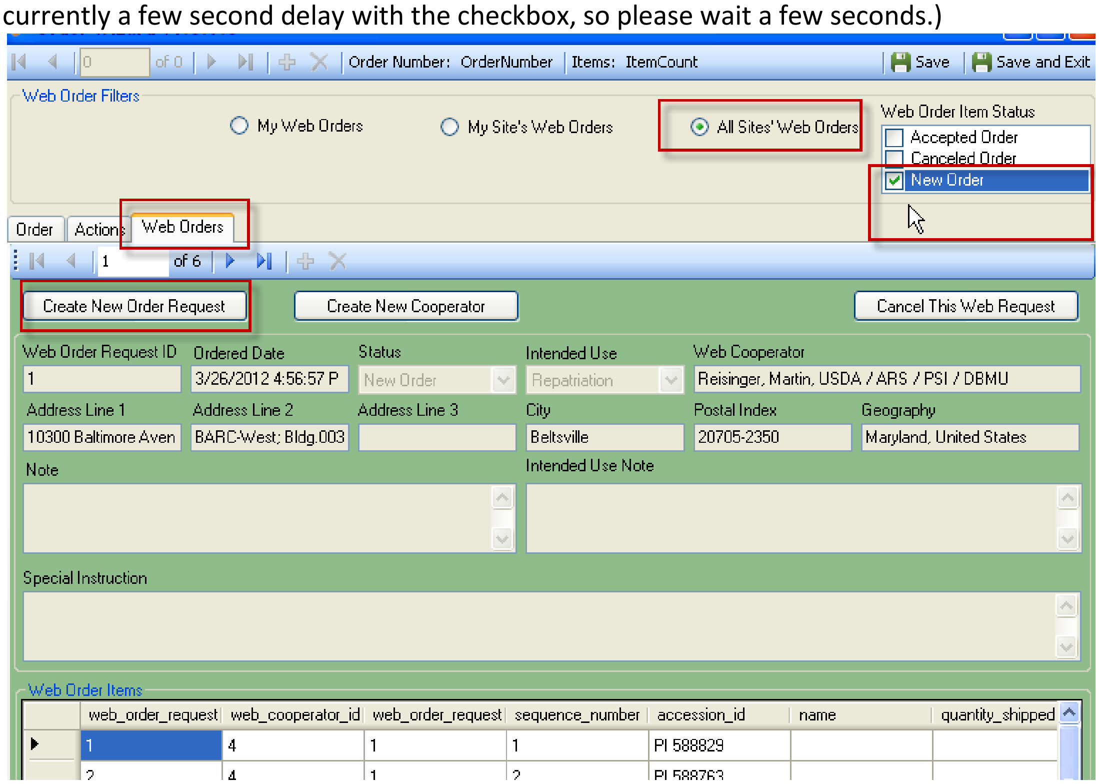
In the CT, simply open the Order Request Item DV, and then select your order in the List Panel.



f. 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.

g. 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 to click on **New Order**. (For some reason there is currently a few second delay with the checkbox, so please wait a few seconds.)



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