

Assignment 4:

Managing Requests (Orders)



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**"Part of the secret of a success in life is to eat what you like
and let the food fight it out inside."
Mark Twain**

In this assignment, we'll use the Curator Tool (CT) as well as the Public Website (PW).

Login to the Public Website

Login to the PW. Then complete your profile if you haven't done that previously. The important thing to be done is to complete your shipping information. Use a shipping address that is different from the primary address.



Practice!

Practice some Public Website (PW) searches.

Try practicing the following:

- a. Multiple Lines: copy these accession IDs into the **List Search** box:

PI 662670

AV 11

Ames 26951

PI 678411

PI 213765

PI 615115

PI 226594

Ames 22649

Ames 25368

Simple Search List Search Advanced Search Results

You may list accessions with separators (commas or semicolons, as shown in the example below):

PI 651794
PI 651649
PI 651650

When searching a range of accessions, use the Advanced Search tab with the following format:

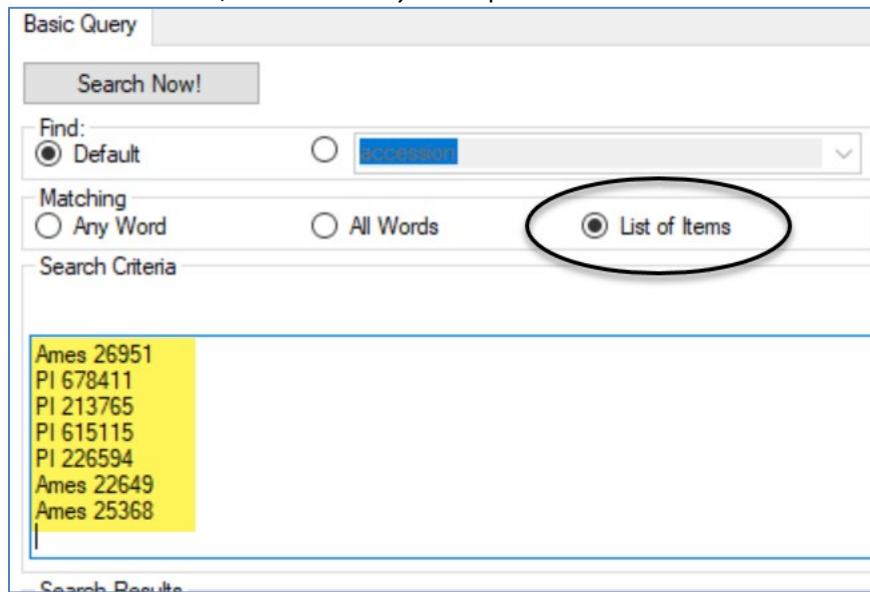
PI 213765
PI 615115
PI 226594
Ames 22649
Ames 25368

Search

☐ Available

☒ All - Including historic (not in the collections, information only)

In the Search Tool, this is *basically* the equivalent search:



The screenshot shows the 'Basic Query' section of a search tool. It includes a 'Search Now!' button, a 'Find:' dropdown menu with 'Accession' selected, and a 'Matching' section with three radio buttons: 'Default' (selected), 'Any Word', and 'List of Items' (circled in black). Below these is a 'Search Criteria' section with a list of accessions: Ames 26951, PI 678411, PI 213765, PI 615115, PI 226594, Ames 22649, and Ames 25368. The 'Search Results' section is partially visible at the bottom.



In the ST, remember to reset the radio button when you are no longer searching by a list of accessions.

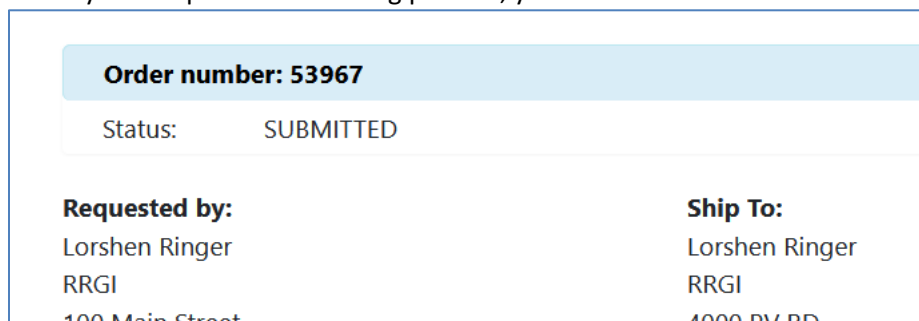
Read the Search Guide at your leisure!

https://www.grin-global.org/docs/gg_searches.docx

- b. Search for *some of your accessions* which have inventory and therefore are available.

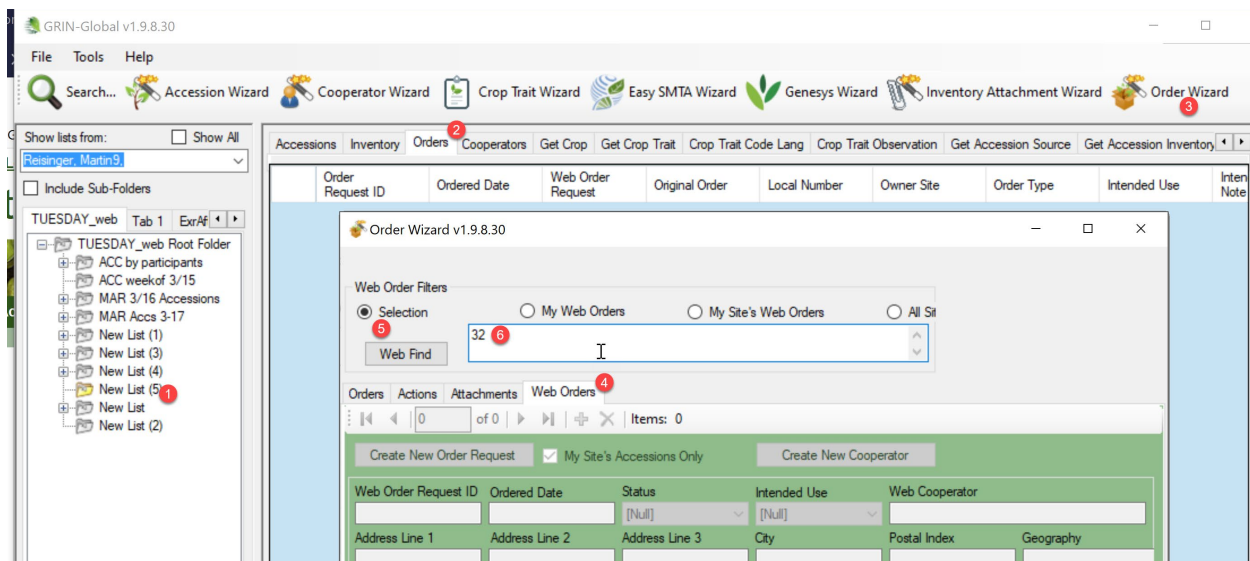
At some point, click on the cart and proceed with requesting the germplasm in your cart.

When you complete the ordering process, you should see a web order number near the top of the page.

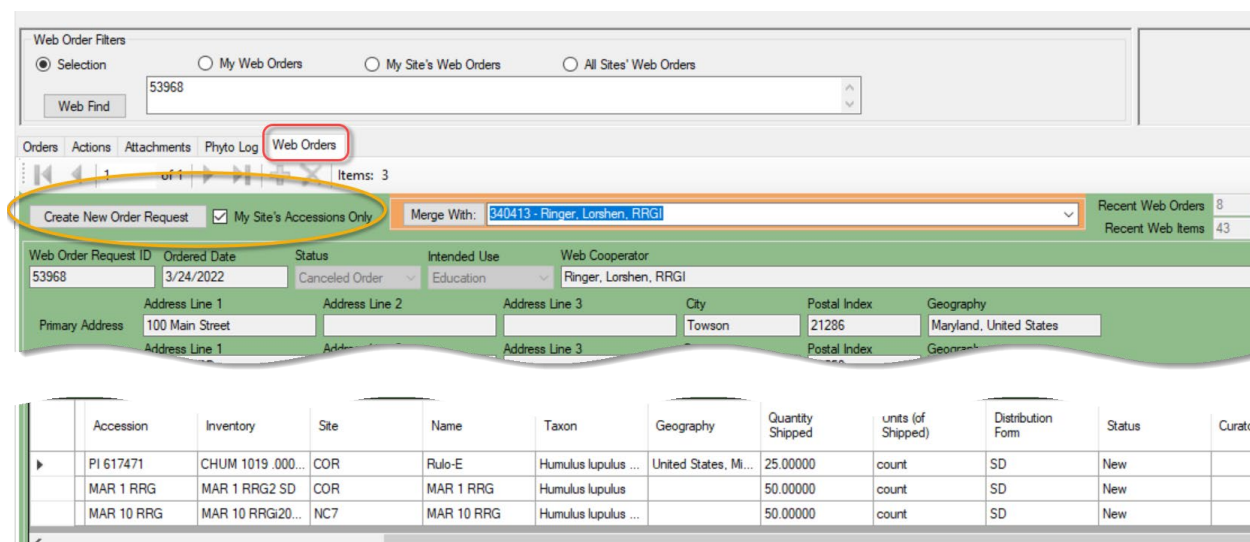


The screenshot shows an order confirmation page. At the top, it displays 'Order number: 53967'. Below this, the status is 'SUBMITTED'. The page is divided into two columns: 'Requested by:' and 'Ship To:'. Both columns list 'Lorshen Ringer', 'RRGI', and '100 Main Street'.

Switch gears and use the Curator Tool to find this incoming web order request (WOR). Start by having an empty folder ready on the CT's left panel. On the right, open the **Order** dataview tab; then click on the Order Wizard:



Usually, when processing orders, you only want orders for your site, that is, the accessions that are maintained and managed by your site. The default **My Site's Accessions Only** checkbox ensures that happens.



Remember who submitted this request? It was you, using your Public Website account.

As the requestor, if this was your first order in the TRAINING database, then a cooperador record most likely doesn't exist in the database. As the order processor in the CT, you will be prompted via the Order Wizard / Cooperador combination to add two new cooperador records.



Beginning with CT 1.9.9.4, the Order Wizard is tightly integrated with the Cooperador Wizard. When you click the **Create New Order Request** button, the Cooperador Wizard will launch and you will be expected to select a **Primary Address** and a **Shipping Address** for the Cooperador. For a new cooperador, if the shipping address differs from the primary address, two new

cooperator records will be created in the **Cooperator** table.

Complete details for how this works is in the online document:

https://www.grin-global.org/docs/gg_order_and_cooperator_wizard_v1.9.9.4.pdf


A video demonstrates this entire process:

<https://www.grin-global.org/videos/orderwiz2.mp4>


Match Score	Cooperator ID	Status	Last Name	Title	First Name
100	183846	ACTIVE	Ringer		Lorshen
087	183847	ACTIVE	Ringer		Lorshen

Eventually, when you have successfully indicated the primary and shipping addresses, saving and exiting returns you to the Order Wizard. The end goal is to create a standard order (a 6 digit number will display on the top oof the wizard window) but don't ship anything yet.

Make a note of the order number: _____

 Switch hats! Return to the Public Website and submit another WOR. Ideally this request will contain accessions that you own they you may not have included in the prior request.

Merging Orders

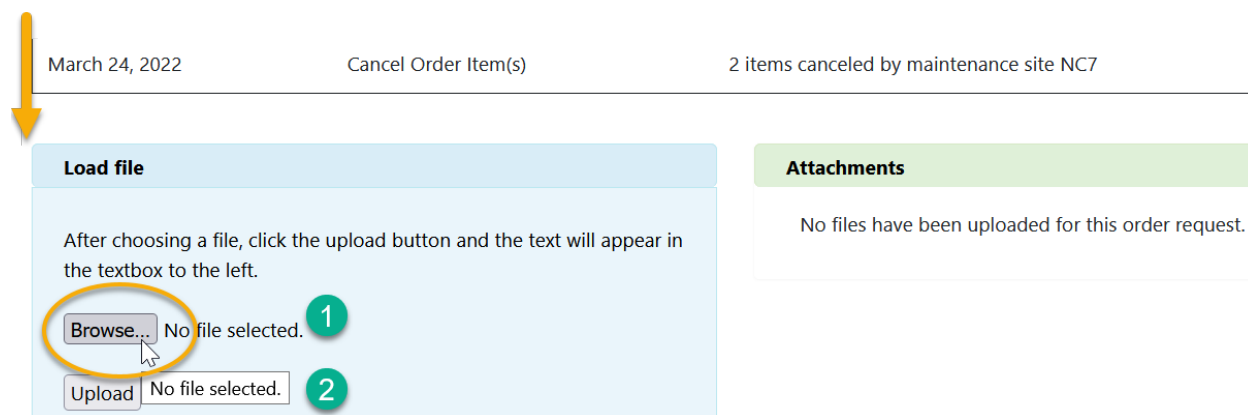
 Switch hats! Return to the Curator Tool and look for WOR just submitted above. Instead of creating a new order, use the **Merge With** feature ti add the current items you the previously existing order. (Often a user will submit two requests back-to-back for various reasons. This helpful utility enables combining the WORs.

Web Order Request ID	Ordered Date	Status	Intended Use	Web Cooperator
53969	3/24/2022	Reviewing	Education	Ringer, Lorshen, RRGI

	Address Line 1	Address Line 2	Address Line 3	City	Postal Index	Geography
Primary Address	100 Main Street			Towson	21286	Maryland
Shipping Address	4000 PV RD			Oakland	21550	Maryland

Attaching Files

Before completing the order, attach images, documents, PDFs, or spreadsheets two different ways to the order. One way is to wear the requestor hat, and do so from the Public Website. Find the web order from you history, and scroll down. The process requires two steps, browse for the file, then upload:



March 24, 2022 Cancel Order Item(s) 2 items canceled by maintenance site NC7

Load file


After choosing a file, click the upload button and the text will appear in the textbox to the left.

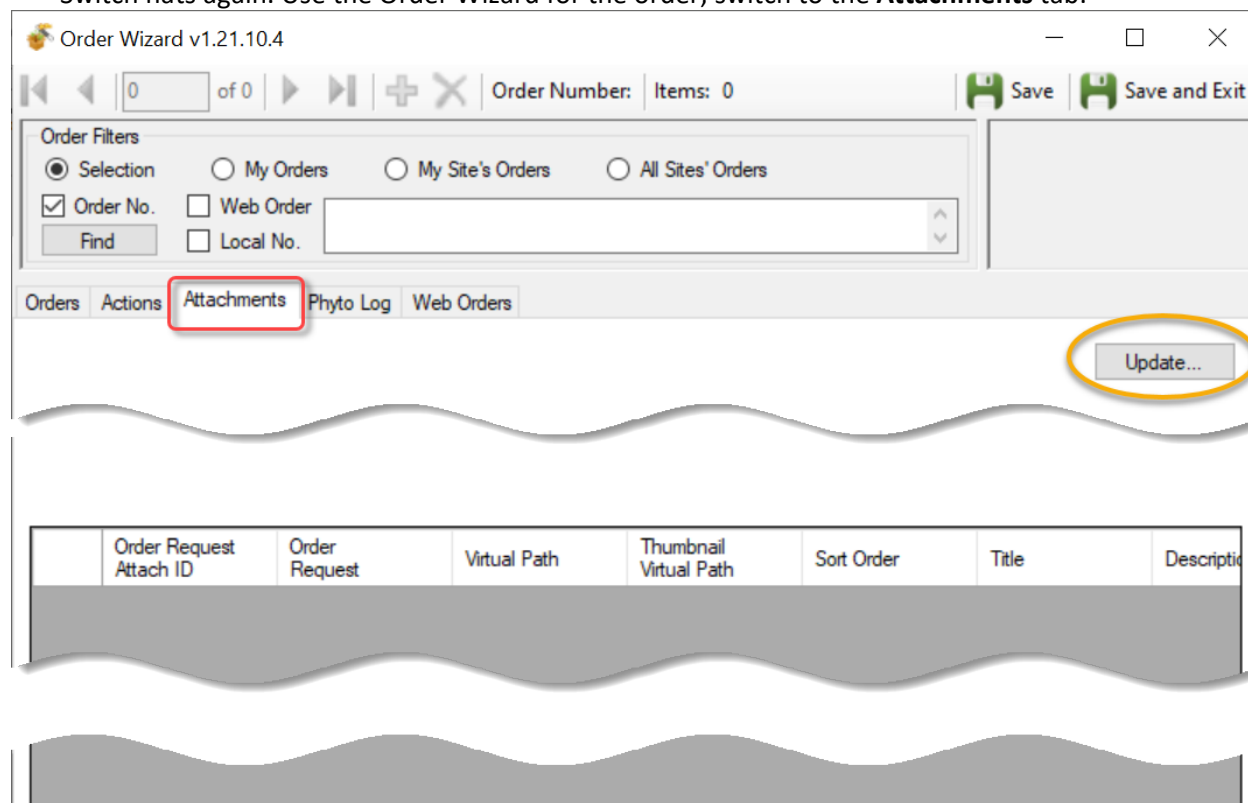
Browse... No file selected. 1

Upload No file selected. 2

Attachments

No files have been uploaded for this order request.

 Switch hats again. Use the Order Wizard for the order; switch to the **Attachments** tab:



Order Wizard v1.21.10.4

Order Number: Items: 0 Save Save and Exit

Order Filters

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

☒ Order No. ☐ Web Order ☐ Local No.

Find

Orders Actions **Attachments** Phyto Log Web Orders

Update...

Order Request Attach ID	Order Request	Virtual Path	Thumbnail Virtual Path	Sort Order	Title	Description
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Use the Update to display the PW attachments. In the bottom gray area, drag a filename from Windows Explorer. Depending on the file type you will either see the file immediately displayed, or you will be prompted by a dialog box.

Create a Manual Order



Practice! Create a Replenishment/regrow order manually. If details are needed, refer to the online documentation:

Order Processing at https://www.grin-global.org/docs/gg_order_processing.docx

Managing Orders

Many methods exist for searching for the WORs or the Orders.

Perhaps the most straightforward is to use the Search Tool. Create a query that works as expected and then drag the query text to a blank folder in the CT:

Search Now!

Find: ☒ Default ☐ accession

Matching: ☐ Any Word ☒ All Words ☐ List of Items

Search Criteria

Drag to the CT and create a DQ

@order_request.web_order_request_id = 53965

Clear Text

Search Results

Add To Query Clear Query Limit: 4700 Page Size: 1000

Get Cooperator Get Order Request Get Web Cooperator Get Web Order Request Get Web Order Re

Order Request ID	Ordered Date	Web Order Request	Original Order	Local Number
340413	3/22/2022	53965	340413 - Ringer, Lorshen, RRG	

In the Order Wizard, remember that you can search under the **Order Filters** by Order No. or Web Order No., but this only works when an Order has been created for the WOR:

Order Wizard v1.21.10.4

0 of 0 Order Number: Items: 0

Order Filters

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

☒ Order No. ☐ Web Order

Find ☐ Local No.

Orders Actions Attachments Phyto Log Web Orders

On the **Web Orders** tab, the search works by WOR number:

Order Wizard v1.21.10.4

Web Order Filters

☒ Selection ☐ My Web Orders ☐ My Site's Web Orders ☐ All Sites' Web Orders

Web Find 53969

Orders Actions Attachments Phyto Log **Web Orders**

1 of 1 Items: 6

Create New Order Request ☒ My Site's Accessions Only Merge With: RRG1

Recent Web Orders 9
Recent Web Items 49

Web Order Request ID	Ordered Date	Status	Intended Use	Web Cooperator
53969	3/24/2022	Reviewing	Education	Ringer, Lorshen, RRG1

Address Line 1 Address Line 2 Address Line 3 City

Dynamic Queries

Example 1: Lists all WORs submitted in the past 30 days that are still under review by the NRR Review Committee. (web_order_request.status_code = 'NRR_FLAG')

Dynamic List Options

Resolve To:

☒ Default ☐ Accession ☐ Inventory ☐ Order Request ☐ Cooperator

Dynamic Folder Search Criteria:

```
-- @site.site_short_name = 'NC7'
-- AND
@web_order_request.status_code = 'NRR_FLAG'
AND
@web_order_request.created_date > GETUTCDATE() - 30
```

Optional: The leading double dash -- comments out the remainder of the line. Remove the dashes, and substitute your site code for the NC7 code.

Example 2: Search by the WOR number. The commented text between the /* ... */ can be used when there are multiple WOR to search for.

Dynamic List Options

Resolve To:

☒ Default ☐ Accession ☐ Inventory ☐ Order Request ☐ Cooperator

Dynamic Folder Search Criteria:

```
@web_order_request.web_order_request_id
= 54276
/*
IN
( 53355,
53320,
53103
)
*/
```

Dynamic List Options

Resolve To:

☒ Default

☐ Accession

☐ Inventory

☐ Order Request

☐ Cooperator

☐ Accession

Dynamic Folder Search Criteria:

@web_order_request.web_order_request_id
IN
(53355,
53320,
53103
)



Practice! Create some dynamic queries for use at your site. Some status codes are listed below.

Get Crop Trait Lang Get Crop Trait Observation Get Inventory Maintenance Policy Get Code Value Language Get Code Value						
	Code Value ID	Group Name	Value	Created Date	Created By	
	3572	WEB_ORDER_REQUEST_STATUS	ACCEPTED	3/2/2011 4:20 PM	SYSTEM, Admini...	8
	3573	WEB_ORDER_REQUEST_STATUS	CANCELED	3/2/2011 4:20 PM	SYSTEM, Admini...	1
	3574	WEB_ORDER_REQUEST_STATUS	SUBMITTED	3/2/2011 4:21 PM	SYSTEM, Admini...	1
	5201	WEB_ORDER_REQUEST_STATUS	NRR_FLAG	8/6/2021 3:22 PM	SYSTEM, Admini...	
	5213	WEB_ORDER_REQUEST_STATUS	MIXED	8/10/2021 2:25 ...	Haag, Benjamin, ...	