

Order Processing



Revision Date

April 7, 2023

CT version 1.9.8.30 and above



This guide provides an overview to order processing in GRIN-Global (GG).

Detailed, step-by-step directions on the latest Order Wizard are given in a separate document: http://grin-global.org/docs/gg_order_and_cooperator_wizard_v1.9.9.4.docx

A video online also demonstrates the many steps that are involved:

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

The [Appendix](#) contains this document's [revision notes](#). To review the Curator Tool's version changes, please refer to the online [Curator Tool User Guide](#).

Review the [Table of Contents](#) which contains links to the document's sections

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Comments/Suggestions:

Please contact feedback@ars-grin.gov with any suggestions or questions related to this document. This and other GRIN-Global –related documentation can be downloaded from the GRIN-Global [Training page](#).

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Orders Overview

Genebank clients request germplasm through various means:

- GRIN-Global public website (PW)
- email
- telephone
- [Genesys](#)

Each organization using the GRIN-Global software will determine their respective criteria and methods for accepting orders. This document describes how orders can be processed in GRIN-Global, with the emphasis on receiving orders via the GG Public Website (PW). Typically, germplasm requesters create a user profile and search for accession or inventory items before adding them to their shopping carts – eventually submitting their cart for order processing. (Detailed information on setting up and modifying a PW user profile can be found in the Public Website Help feature.)

The “shopping cart” feature is modeled after other websites – the user can continue “shopping” and add items (in this case accessions or inventory items) into the cart. Assuming the user is logged in, she can also add items to **My Favorites** (a “wish list”) and decide later to order from the list. (The cart can also be left with items in it, and the user can log out and return later to update or send the order.)

In GG, the germplasm requesters generally submit their orders via the GG Public Website. Using the Curator Tool’s Order Wizard, genebank staff responsible for order fulfillment can review those incoming *web order requests* (WORs) and convert them into *standard* GRIN-Global orders.

During the order processing, genebank staff will use the Curator Tool (CT) Order Wizard to manage and monitor the order’s status. Several order-related CT dataviews can be used, but the Order Wizard with its business rules facilitates the order tracking process.

An online video: <https://www.grin-global.org/videos/orderwiz2.mp4> illustrates the steps involved in processing a web order request submitted from the GG public website.

Relationship of Orders to Web Order Requests (WORs)

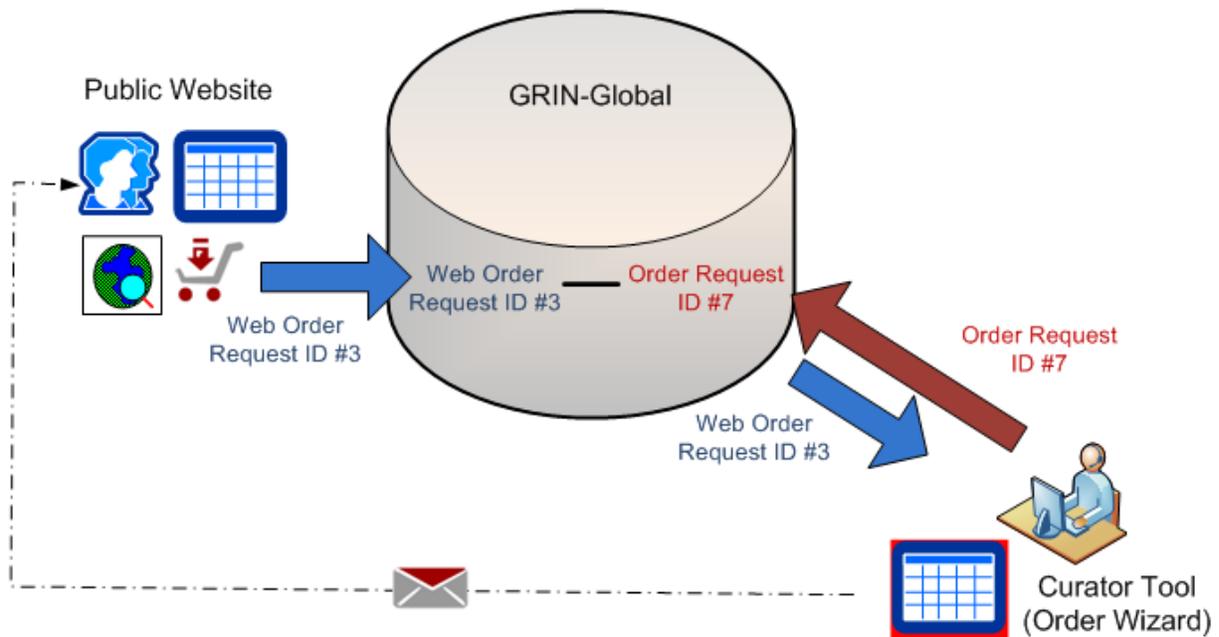
Because the Curator Tool and the Public Website (PW) are independent programs – you do not need one to run the other – the requests submitted into the PW by researchers / requesters are not stored *directly* in the GG (main) **Order Request** table. Instead, the incoming PW requests submitted by external users are stored in a **Web Order Request** table. In this document, to differentiate the two tables, we will use the term “Requests” or “WORs” to denote the incoming Web Order Requests. When the genebank’s staff person starts processing the request using the Order Wizard, they will save essentially a copy of this request in a separate table; we will refer to that as “the order.” (At the USDA NPGS, the genebank staff often refer to this as the GRIN order, because their database system prior to GG was “GRIN.”)

<p>order_request</p> <ul style="list-style-type: none"> order_request_id original_order_request_id web_order_request_id local_number order_type_code ordered_date intended_use_code intended_use_note completed_date requestor_cooperator_id ship_to_cooperator_id final_recipient_cooperator_id order_obtained_via feedback_id special_instruction note created_date created_by modified_date modified_by owned_date owned_by 	<p>web_order_request</p> <ul style="list-style-type: none"> web_order_request_id web_cooperator_id ordered_date intended_use_code intended_use_note status_code note special_instruction created_date created_by modified_date modified_by owned_date owned_by 	<p>Shown here are partial table structures for the two order types. Notice that the order_request contains the web_order_request_id field so that it can link to a web_order_request. (Conversely, the web_order_request does not contain a key to the order_request. If a germplasm requester refers to an order number, she would be referring to her web_order_number.)</p>
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[Accessions](#) > [Descriptors](#) > [Taxonomy](#) > [View Cart](#)
[Home Page](#) > [My Profile](#) > [My Order History](#)
 You have submitted **25** germplasm order(s).

 order placed on:
January 26, 2016
[view detail](#)
 Order Request Number **5371**

Public Web Orders to Orders Conversion (Diagram)



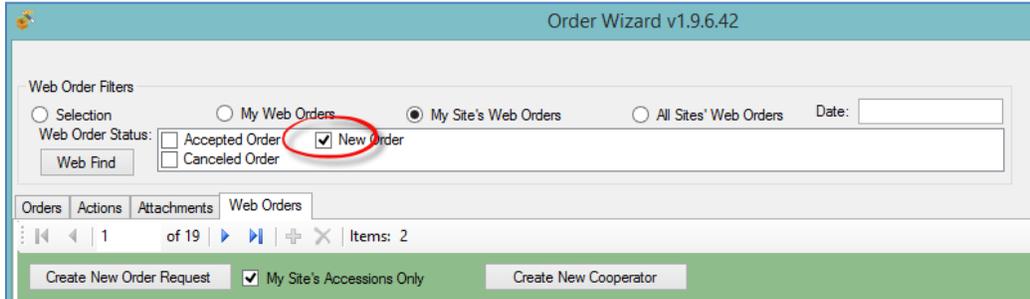
During this order process, the incoming Web Order Request record becomes the basis for a GRIN-Global Order record. The Web Order Request record's ID is its primary key field; the GG Order Request record created from it will have its own unique record ID. Although the records are inter-related, the two record IDs (and the records) are distinct.

Canceling Incoming Web Orders

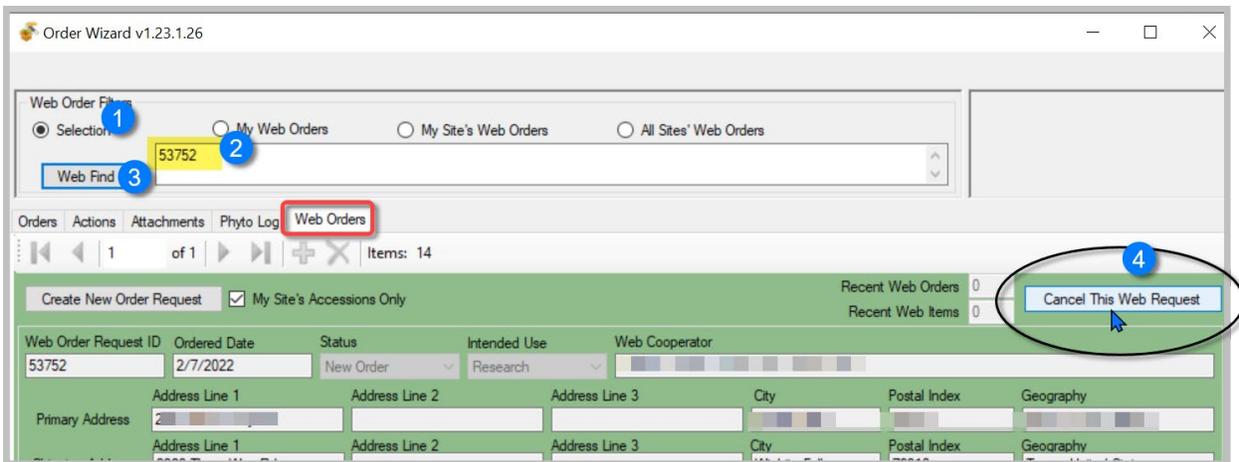
A requester cannot cancel their PW request.

Beginning with server 1.9.9.2, a genbank staff person can use the Order Wizard's Cancel button to essentially prevent any processing of the WOR and change its status to "Cancelled."

Some sites decide to simply not process the web order and ignore it. This can be a bit of a nuisance because the web orders will still be considered "new" and will be found by the order wizard:



The easiest way to cancel an incoming WOR is to find it in the order wizard, and then use the Cancel button. Done!



GG Administrators: NPGS implemented a utility that is not bundled in the GG build. This utility can be implemented to set up a filtering process before the submitted WOR's enter the genbank's order pipeline. For more information, contact the USDA developers via GRIN.Global.Orders@usda.gov.

Finding Orders via...

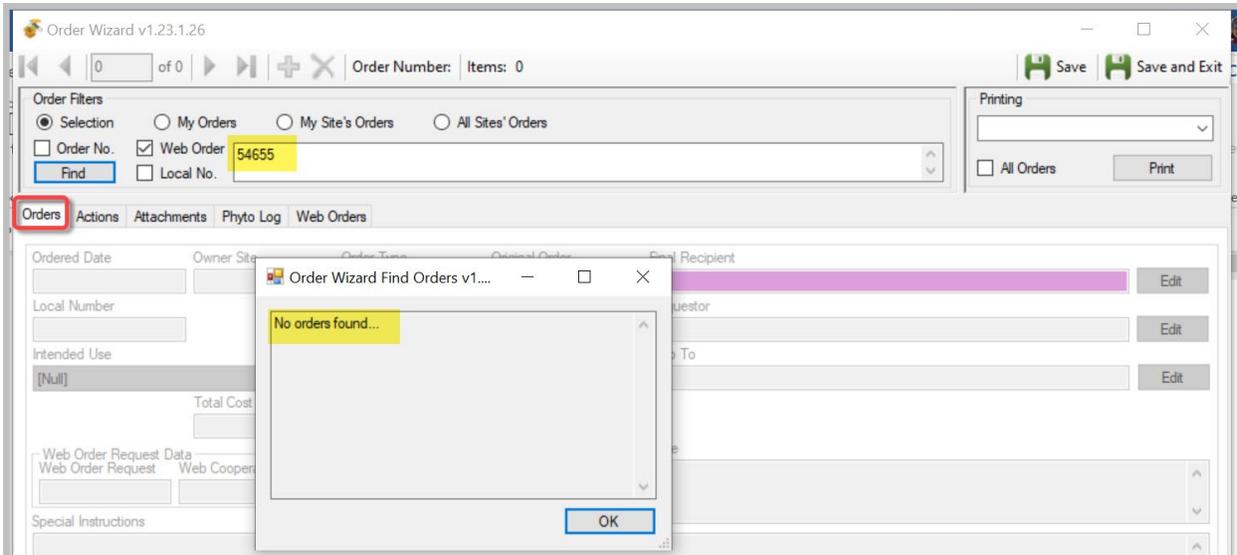
Public Website

Genebank staff who have a PW with extended privileges have available to them extra reports including a report for searching web orders:



Order Wizard

The CT Order Wizard can search for web orders also, but only if the web order request has a corresponding order. In the following screen showing the Order Wizard, why is the OW not finding WOR 54655 that is in the database? Because the OW tab **Orders** is the current tab.



Orders Overview

The wizard is searching the Order table for an Order that has a related WOR #54655. Every **Order** record has a field, the **Web Order Request** field, that relates the two records from the two tables.

Order Request ID	Ordered Date	Completed Date	Web Order Request	Original Order	Local Number	Owner Site	Order Type

When in the OW, using the **Orders** tab, you are searching the **Order Request** table. The OW was designed so that you could specify the **Web Order Request** number, but search the **Order Request** table. In the example above and below, **Web Order Request # 54655** exists, but there is no corresponding **Order** yet.

via Search Tool (and Curator Tool) Dataviews

Search Results

Add To Query Clear Query Limit: 50000 Pa

Accession	Inventory	Cooperator	Crop Trait Observation	Web Cooperator	Web Order Request	OrderReqAction	Order Request	Get Web Order Request Item
			59853					
Order Request ID	Ordered Date	Web Order Request	Original Order	Local Number	Owner Site	Order Type	Intended Use	
347323	3/2/2023	59853	347323 - M	US	W6	Distribution	Research	

Search Criteria

Clear Text

@web_cooperator.email = 'sar...v|

Search Results

Add To Query Clear Query Limit: 50000 Page Size: 1000

Accession	Inventory	Cooperator	Crop Trait Observation	Web Cooperator	Web Order Request	OrderReqAction	Order Re
Web Order Request ID	Web Cooperator	Last Name	Title	First Name	Organization	Add	
						1	

Displaying Lists of Weborders

In the Curator Tool, establish a folder and use the following code as the basis for your Dynamic Folder's query: **@web_order_request.web_order_request_id = 17695**
The number shown in red is the weborder.

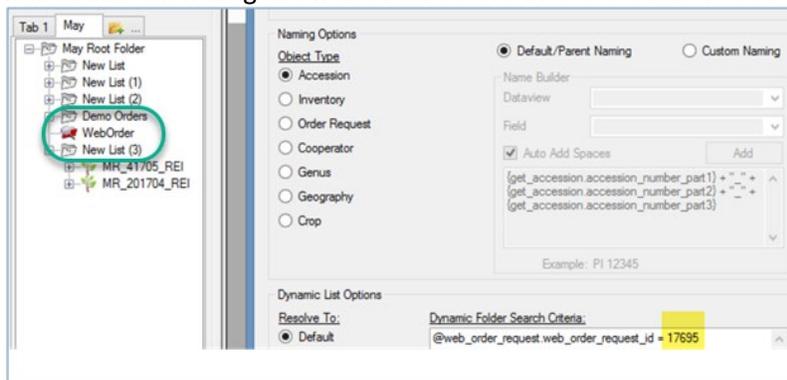
Alternatively, more involved criteria could be set up for your dynamic query. For example, use a query based on a date range:

@web_order_request.ordered_date BETWEEN '8/1/2017' AND '8/11/2017'

or your site code, and the web_order_request_item.status_code:

@site.site_short_name = **'NC7'**
AND @web_order_request_item.status_code = **'NEW'**

You can of course use the Search Tool to search, using the **web_order_request** dataview, to find the web order. Then drag the web order record into the Curator Tool.



Web Cooperators and GG Cooperators in the Curator Tool

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. Generally, the public website requester creates his or her own record, stored in the **Web Cooperator** table. Genebank staff, working within the Curator Tool, create and edit records in the main **Cooperator** table.

Using the Order Wizard, when processing an incoming request, 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.



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.”

Order request-related dataviews

In the Curator Tool, there are several order-related dataviews used to display the order information. Since most order related work is handled via the Order Wizard, working directly in the dataviews is discouraged. However, listed here for reference are some of the main GRIN-Global order-related dataviews:

Dataview	Description
order_request	Provides general information about the order such as the date and type of order, requester, 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.
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_attach	Attachments (.pdf, .docx, jpg, xlsx files, etc.) can be submitted with a web order (before the order is converted to a standard GG order). (Additional programming work needs to be done to allow additional documents be attached after the order is processed in the CT.) Attachments can also be directly dragged and dropped into this dataview in the CT.
web_order_request	Provides general information about web orders such as the date and type of order, requester, final recipient, etc. This web order request is generated by a requester 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

Recommended: a genebank's staff should use the Order Wizard to review and manage web order requests (rather than use the order-related dataviews.)

Note that a genebank may also initiate internal orders via the Order Wizard. This is frequently done for various reasons; the image below shows the types of orders done at the USDA's NPGS. Remember that a genebank's GG administrator can modify these dropdown lists and in this case could add or remove entries from the list.

The screenshot shows the Order Wizard interface with a dropdown menu open for the 'Order Type' field. The dropdown list includes the following options: [Null], Backup, Distribution, Germination, Gemplasm introduction, Herbarium/reidentification, Information only, Non-research, non-educational, Observation/evaluation, Phytosanitary Testing, Repatriation, Replenishment/regrow, and Transfer. The 'Distribution' option is currently selected and highlighted in green. The background interface shows fields for 'Ordered Date' (2/24/2023), 'Owner Site' (NC7), 'Local Number', 'Intended Use' ([Null]), 'Total Cost' (\$0.00), and 'Web Order Request Data'.

Processing Incoming Web Order Requests

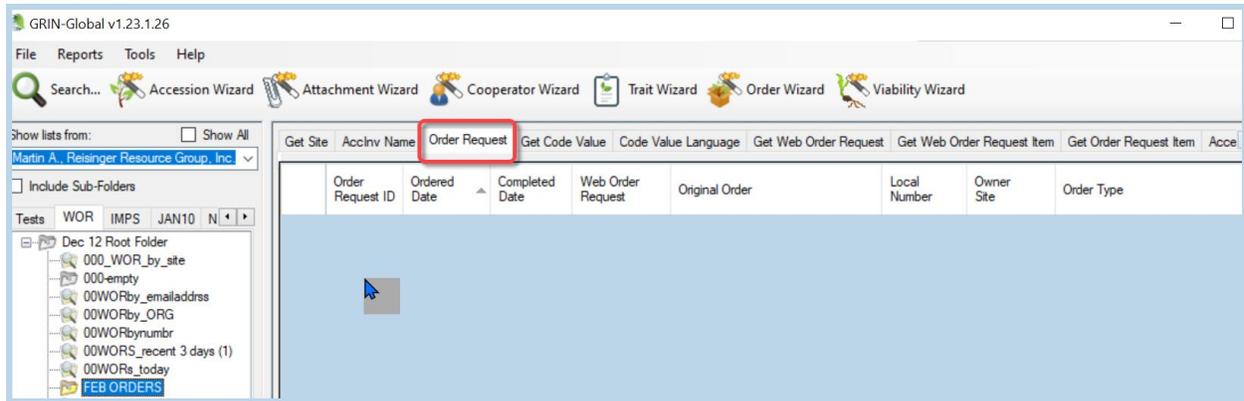
Many, if not most of an organization's germplasm requests from external requesters, will be coming from the GRIN-Global Public Website. Use the Order Wizard to convert these web order request (WORs) into GG order requests.

Start the Order Wizard

Although not absolutely necessary, before invoking the **Order Wizard**, in the Curator Tool, decide what list folder in the left panel will be your active list. Then, as you create and save new orders, you will be prompted to add corresponding orders to your active list. Another consideration not essential (but recommended), before clicking the Order Wizard button, open the **Order Request** dataview as the active dataview. In the following example, the user's active folder in the list panel is labeled "FEB

Order Wizard

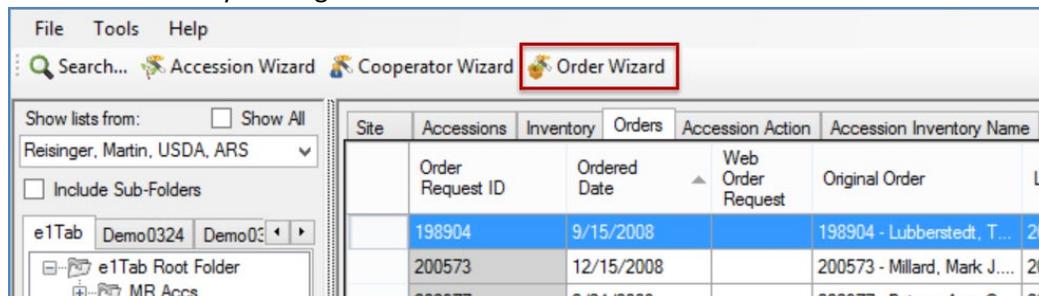
ORDERS”:



A user can organize his incoming orders by the day, week, month, or some other criterion, such as by genus or species. Alternatively, the folders may be set up for new orders, pending orders, completed orders, etc.

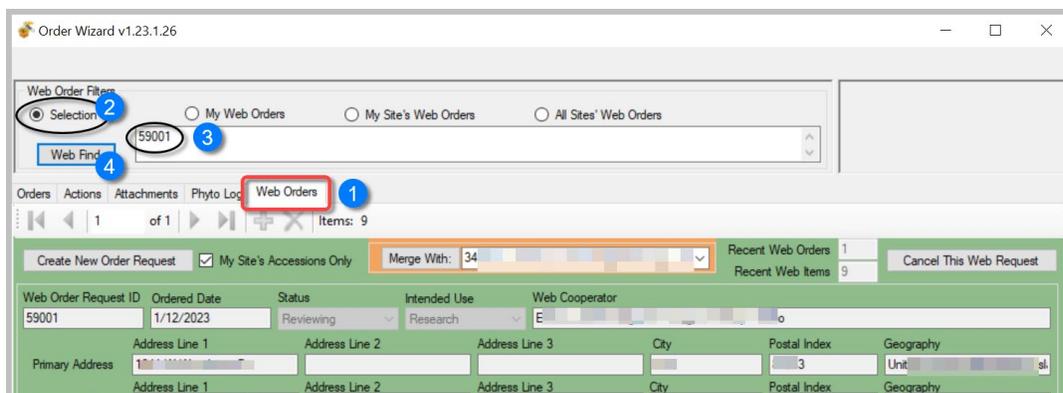
Start 1

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



Step 2

Click the **Web Orders** tab; select the appropriate radio button: (**Selection**, **My Web Orders**, **My Site's Web Orders**, or **All Sites' Web Orders**); for processing new orders the **New Order** checkbox should be checked. Since the incoming web order generated an email message that includes Web Order Request number, use the **Selection** radio button and then input the request number into the **Web Find** box.



Order Wizard



Use the **Selection** radio button and the Web Order Request number (found in the email message) to avoid potential issues when incoming orders are sent to multiple sites. With multiple site requests, one site may accept the order before you do, and then when you search for “new” orders, the Wizard will not find it because the request is no longer considered “new.”



You can find details about an incoming web order on the Public Website if you are logged in.

U.S. National Plant Germplasm System

Accessions Descriptors Reports GRIN Taxonomy GRIN Help Contact Us Tools Your Profile

Select a report using either the list of all reports, or find by category.

All Reports Reports by Category Reset Reports

List of all reports

Web Order Detail

This is the report the web order requestor would see.

Name	Value
web_order_id	59001



The Order Wizard by default is designed so that when you generate an order, only your site’s accessions will automatically be included in the order. Remember that the incoming request may include accessions from other sites. Generally, the checkbox indicating this default should remain checked.

Orders Actions Attachments Web Orders

Create New Order Request My Site's Accessions Only Create

My Site's Accessions Only

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

Web Order Filters

Selection My Web Orders My Site's Web Orders All Sites' Web Orders Date:

Web Order Status: Accepted Order New Order Canceled Order

Web Find

Orders Actions Attachments Web Orders

Create New Order Request My Site's Accessions Only Create New Cooperator

Web Order Request ID Ordered Date Status

4241	3/13/2015	New Order
------	-----------	-----------

address_line1 address_line2 address_line3

207 Melancholy Way

Note

Special Instruction

Web Order Items

Web Order Request Item ID	Cooperator	Web Order Request	Item Number	Accession	Site	Name	Taxon
9035	Beauchard, Elois...	4241	1	MR 201501 REI	DBMU	Đầu tương nếp đi...	Prunus am

Order Wizard Cooperator Missi...

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).

Yes No

Detailed, step-by-step Order Wizard directions are given in a separate document:

http://grin-global.org/docs/gg_order_and_cooperator_wizard_v1.9.9.4.docx

A video online also demonstrates the many steps that are involved:

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

Using the Order Wizard to Create an Internal Order

The Order Wizard can be used to create new germplasm order requests that come to the genebank via emails, phone calls, or other means. New orders can also be internal genebank orders, such as for regeneration, selecting specific inventory for viability testing, etc.

The wizard can be used to manage any existing order regardless of how the order originated.



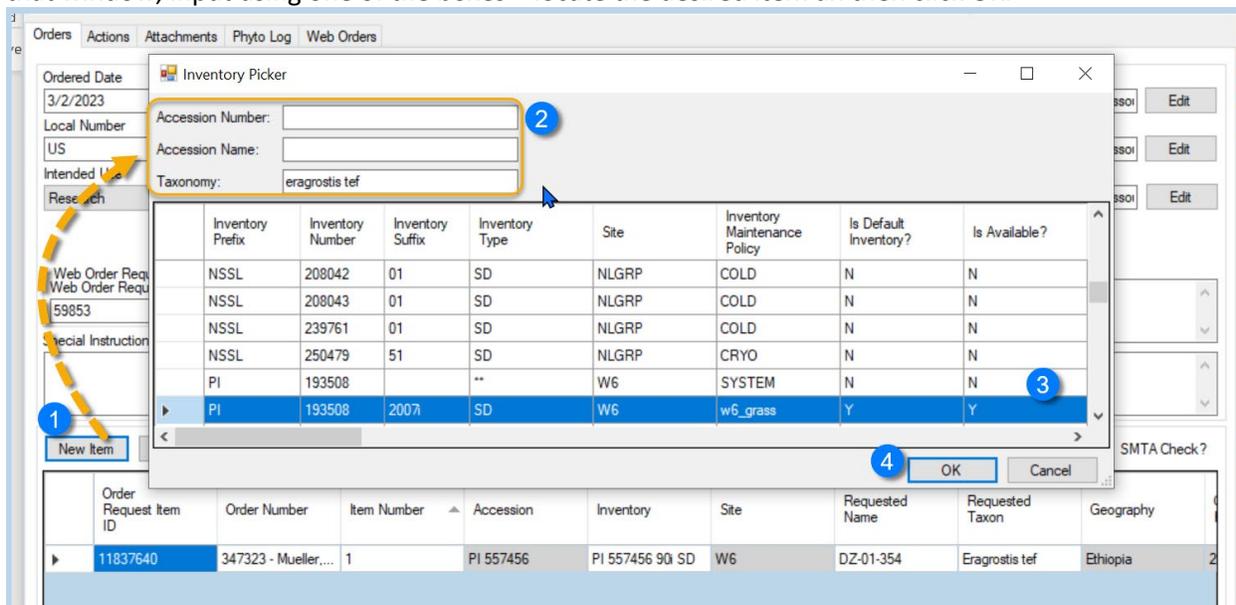
When starting up the Curator Tool, the left tab in the list panel will be active and display the lists under that tab. Consider setting up your folder hierarchy under that left tab so that the lists help with tracking your orders by status or date received or some other criterion. Although not necessary,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



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.

Adding Items Manually to an Order – using the Inventory Picker

There are multiple approaches that can be taken to include additional items to a an order. In the Order Wizard, at the Order tab, you can use the **New Item** button to invoke an Inventory Picker window. In that window, input using one of the boxes – locate the desired item an then click OK.



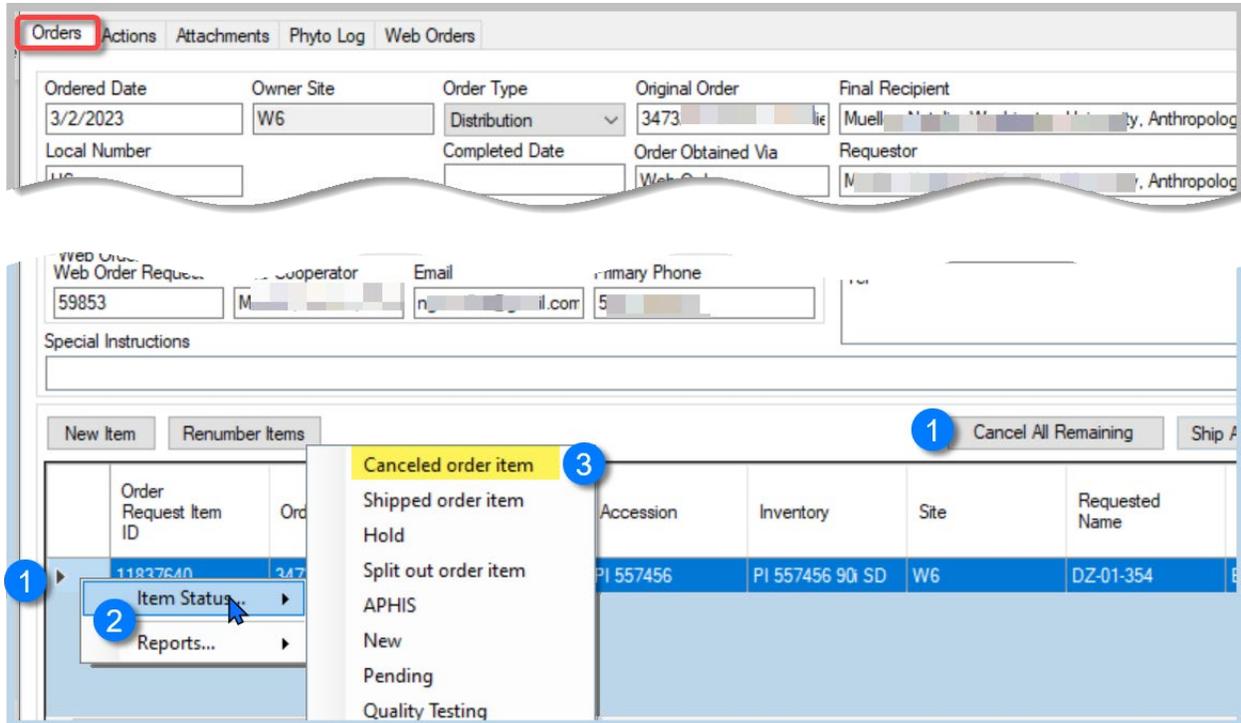
By combining criteria, you can find a desired inventory record. You may also use the % wildcard to cast a broader net for possible matches.

Beside using the Inventory Picker method above, there are several other manual methods that involve dragging data from elsewhere:

Approach	Description							
Drag either accession records or inventory records from the Search Tool grid	Dragging inventory records rather than accession records will perform somewhat better (when selecting accessions, the software must perform additional processing to select the inventory)							
Drag accession key(s) or inventory key(s) from a spreadsheet, Word doc, or an email	<p>An <i>accession</i> key is comprised of three fields:</p> <table border="0"> <tr> <td>Accession Prefix</td> <td>Accession Number</td> <td>Accession Suffix</td> </tr> </table> <p>The wizard interprets an <i>inventory</i> key based on four fields:</p> <table border="0"> <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					
Drag <i>accession</i> or <i>inventory</i> records from the Curator Tool	The wizard will find all the inventory related to the accession and will highlight the inventory that is available and ready for distribution.							

Deleting (Removing) Items from an Order

In the Order Wizard, use either the **Cancel All Remaining** button when appropriate, or select individual items in the item grid, using the leftmost column to select desired rows, and then use the **Canceled order item** option from the menu's **Item Status** option.



Actions (Order Request Actions)

Include Order Actions

Use the Order Wizard **Actions** tab to add any appropriate actions. By doing so, a site can keep track of the progress of the request to ensure timely processing. These actions are stored in the Order Request Action table and the CT respective dataview can be used to search and review if desired.

The following example illustrates an order that was well managed and its individual actions were recorded.

Order Request Action ID	Order Request	Action Name	Started Date	Started Date Format	Action Information	Completed Date	Completed Date Format	Action Cost	Coopera	Note
785703	346434 - Pu...	[Null]	01/13/2023	mm/dd/yy...		01/18/2023	mm/dd/yyyy		Estrad...	Automatically transfer
785704	346434 - Pu...	[Null]	01/13/2023	mm/dd/yy...		01/18/2023	mm/dd/yyyy		Estrad...	Automatically transfer
785702	346434 - Pu...	New Order	01/18/2023	mm/dd/yy...	Send brochure.	01/18/2023	mm/dd/yyyy		Estrad...	New order created fr
785705	346434 - Pu...	Export requirements requested	01/18/2023	mm/dd/yy...	Germany Chenopodium	1/18/2023 1...	[Null]		Estrad...	
785706	346434 - Pu...	Alerted about order	01/18/2023	mm/dd/yy...	Proceed w/PC?	1/18/2023 1...	[Null]		Brenn...	
785907	346434 - Pu...	Curator cleared an order	01/19/2023	mm/dd/yy...	proceed	01/19/2023	mm/dd/yyyy		Brenn...	
786023	346434 - Pu...	Order pending	01/20/2023	mm/dd/yy...	4 oz	01/20/2023	mm/dd/yyyy	0.10000	Estrad...	Order request item sta
786570	346434 - Pu...	Order filled ready to ship	01/24/2023	mm/dd/yy...	10: 4 oz	01/24/2023	mm/dd/yyyy	1.10000	Sonne...	
786751	346434 - Pu...	Requestor contacted NPGS	01/25/2023	mm/dd/yy...	Hello, I have recently ordered some plant gemplasm (order number 59018), which would require the seeds to be sent to Germany. Could you		[Null]		Estrad...	
788718	346434 - Pu...	Order Sent to APHIS (Phytosa...	02/10/2023	mm/dd/yy...	FedEx 9x6x2 Shipped with 344842 , 345879 , 346268 , 346269 , 348431 , 346432 , 346434 , 346440 , 346445 , 345549 FedEx 771254124821	02/10/2023	mm/dd/yyyy	0.00000	Estrad...	Order request item sta INSPECT for 10 items Central Regional PI S
789249	346434 - Pu...	Phytosanitary inspection sche...	02/14/2023	mm/dd/yy...		02/14/2023	mm/dd/yyyy			

Many actions may be applied to an order request; essentially an action indicates that some event related to the order has occurred. In some cases, the action record is automatically generated, such as when the incoming web order request is converted to a standard order. Similarly, an action of **Order Shipped** is automatically generated when an order is shipped.

Order Actions are used to document the processing and current status of the order. Each genebank will follow their own unique standard operating procedures in completing workflows – the action records are used to document actual workflow.

Action Code	Title
NEW	New Order
PENDING	Order pending
APHISASKED	Export requirements requested
CURALERTED	Curator alerted about order
CURCLEARED	Curator cleared an order
PATHSEED	Path test needed and sent
PATHPASSED	Pathologist approved the order
ORDFILLED	Order filled ready to ship
APHIS	Order sent to APHIS (Inspection)

Since only a GG administrator can add Codes, contact the administrator if additional codes are needed.

Note to GG Administrators: **Order Request Action** codes are stored in the **ORDER_REQUEST_ACTION** code group which is maintained by the GRIN-Global administrator.

Tracking Expenses

If desired, you can assign expenses with an action. The Order Wizard will tabulate the total expense associated with the order’s cumulative actions. (Most genebanks do not really have an accurate method for identifying the expense, but they may record a specific cost, such as the shipping expense.)

Order Request	Action Name	Started Date	Started Date Format	Action Information	Completed Date	Completed Date Format	Action Cost	Cooperator
240411 - Pollard, ...	Curator alerted about order	1/17/2013 3:26 ...	Complete date		1/17/2013	Complete date		Stebbins, Robert
240411 - Pollard, ...	Curator cleared an order	1/17/2013 12:01...	Complete date		1/17/2013	Complete date		Reitsma, Kathlee
240411 - Pollard, ...	Curator cleared an order	1/17/2013 9:26 ...	Complete date		1/17/2013	Complete date		Millard, Mark J.,
240411 - Pollard, ...	Curator cleared an order	1/17/2013 5:22 ...	Complete date		1/17/2013	Complete date		Brenner, David, I
240411 - Pollard, ...	New Order	12/30/2012 9:07...	Complete date		1/2/2013	Complete date		Stebbins, Robert
240411 - Pollard, ...	Order filled ready to ship	1/18/2013 10:53...	Complete date		1/18/2013	Complete date		Priffner, Lisa, US
240411 - Pollard, ...	Order pending	1/2/2013 8:21 AM	Complete date		1/2/2013	Complete date		Stebbins, Robert
240411 - Pollard, ...	Requestor solicited for additional i...	1/2/2013 4:47 AM	Complete date		1/2/2013	Complete date		Stebbins, Robert
240411 - Pollard, ...	Order shipped	1/18/2013 1:39 ...	Complete date		1/18/2013	Complete date		Stebbins, Robert
240411 - Pollard, ...	Order sent to APHIS	1/31/2014	[Null]		1/31/2014	[Null]	75.00	Reisinger, Emma
240411 - Pollard, ...	Order filled ready to ship	1/31/2014	[Null]			[Null]	28.00	

Order Wizard Form Fields:

- Ordered Date: 1/2/2013 12:00:00 AM
- Owner Site: NC7
- Order Type: Non-research, non-...
- Original Order: 240411 - Pollard, Tyler,
- Final Recipient: Pollard, Tyler, , 11770 El Camara Drive,
- Local Number: 20122214
- Completed Date: 1/18/2013 12:00:00 A
- Order Obtained Via: PUBLIC
- Requestor: Pollard, Tyler, , 11770 El Camara Drive,
- Intended Use: [Null]
- Intended Use Note: [Null]
- Ship To: Pollard, Tyler, , 11770 El Camara Drive,
- Total Cost: \$103.00
- Note: NRR letter sent.

Item Status Codes

In the Order Wizard grid, each requested item is listed. Each item has its own status. (These status codes are stored in the Code Group **ORDER_REQUEST_ITEM_STATUS**. (The GG administrator can modify these codes to match the codes to the organization’s needs.)

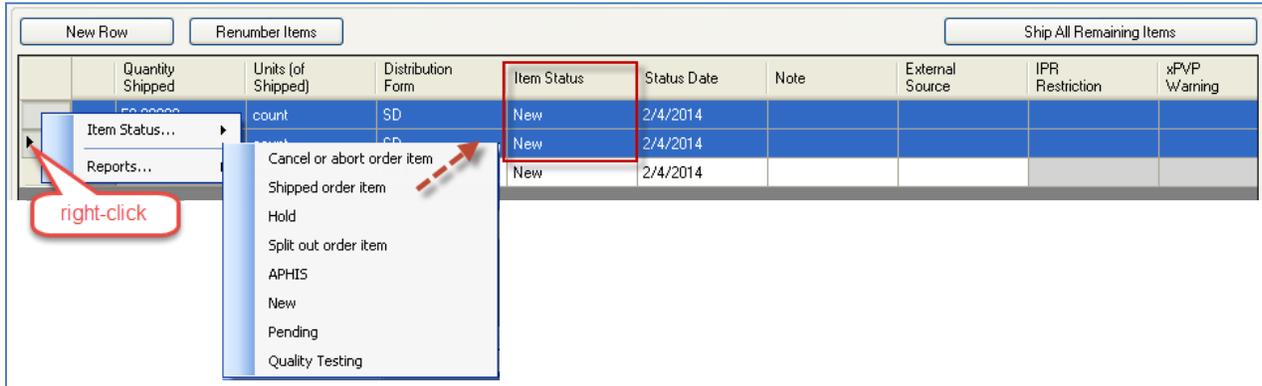
Order Item Status Codes:

Value	Title	Description
CANCEL	Cancel or abort order item	
HOLD	Hold	Hold item (long term)
INSPECT	APHIS	
NEW	New	
PENDING	Pending	
QUALITYTEST	Quality Testing	
SHIPPED	Shipped order item	
SPLIT	Split out order item	

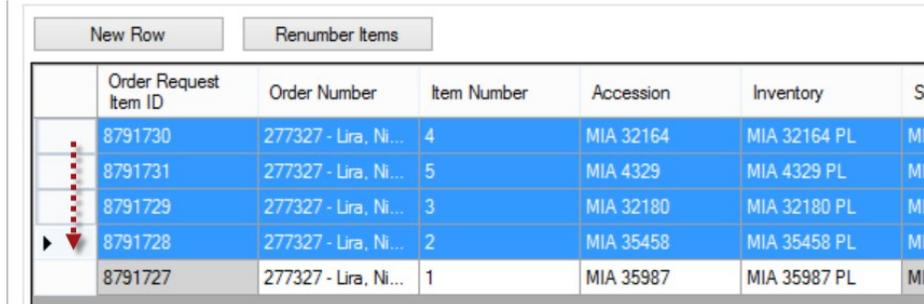
For all items in the grid, when the status is **NEW** or **PENDING** in the **Item Status** column, clicking on the **Ship All Remaining Items** button will change the status to **SHIPPED**.

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

To change the status of one or more items in the grid, right click on the item(s) and then select a status from the **Item Status** menu (or select the **Item Status** cell(s) in the grid and right click):



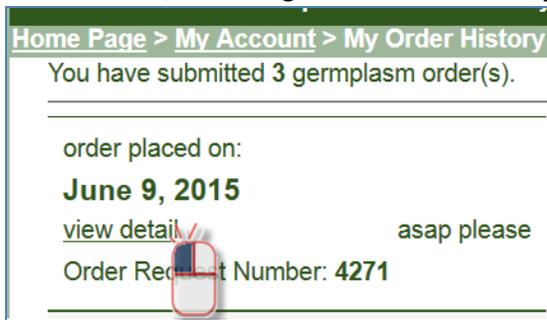
As with other CT grids (similar to Excel), you can select multiple items using the **Ctrl+** and the **Shift+** techniques or by dragging down the header column:



Order Attachments

Attachment files can be submitted by the germplasm requester when he submits his order or later. (Note the ability to add when submitting a new order was introduced in later releases of the GG website.)

To enter later, he must go to his **Order History** and click on the order's **view detail** link:

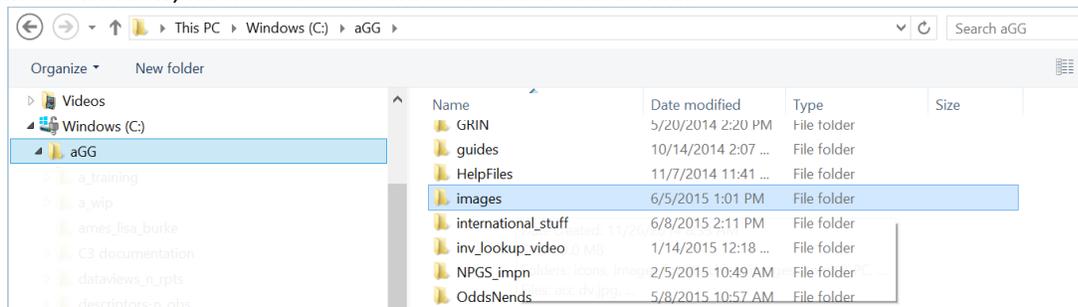


Order Wizard

To upload a file, the requester must first click on the **Browse...** button:

Order Detail Number: 4271		Order Status: ACCEPTED				
Requestor: Eloise Beauchard RRG PHONE: 410.666.0100 FAX:	Ship To: 207 Melancholy Way Lville, Maryland 21093, United States					
Ordered Items (1 item):						
ID	Plant Name	Taxonomy	Form Distributed	Item Status	Maintained by	Comments
MR 201502 REI		Vitis vinifera	Seed	ACCEPTED	DBMU	
Intended use for this germplasm: RESEARCH:Entomological investigations. Research use notes - looking 4 bugs						
Special instructions for the order: asap please						
You may have ordered accessions from more than one NPGS site and your order maybe split between sites and may be handled in different ways. You may receive your material in several shipments.						
Order Request Actions:						
Action Step	Action Date	Action Note				
NEW	June 9, 2015	New Order created from Web Order by marty.reisinger@ars.usda.gov				
Upload File						
Browse... No file selected.						
Upload Note: To save and upload a document, the upload button must be pressed.						

In the window, he then locates and selects the source file:



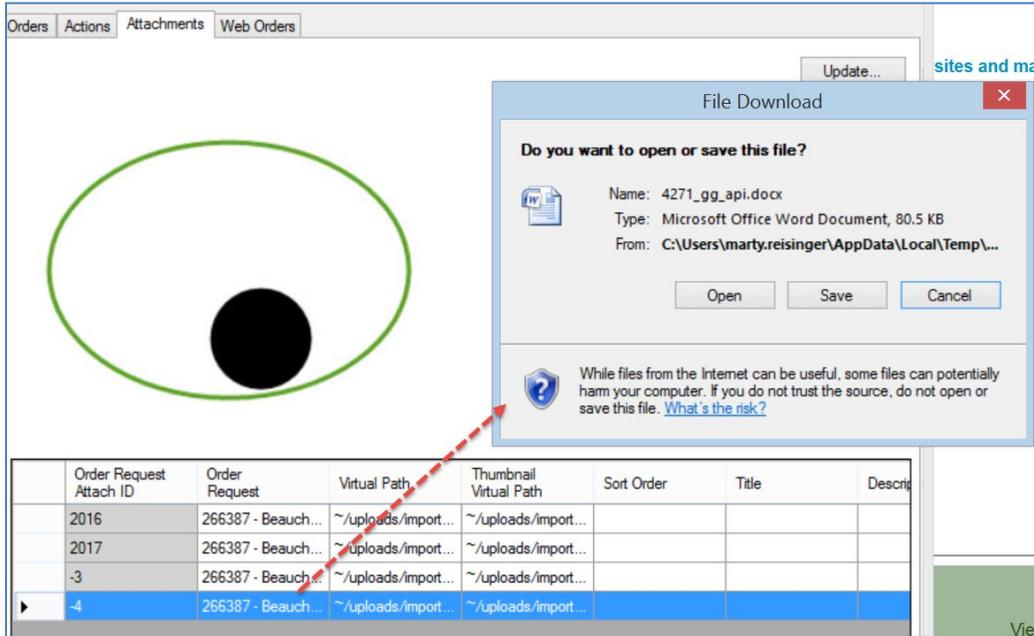
and will ultimately click on the **Upload** button to load the file:

Upload File	
Browse...	PI_588791.jpg
Upload	Note: To save and upload a document, the upload button must be pressed.
File Name	Upload Timestamp

The requester can continue to upload additional files until the order has been shipped.

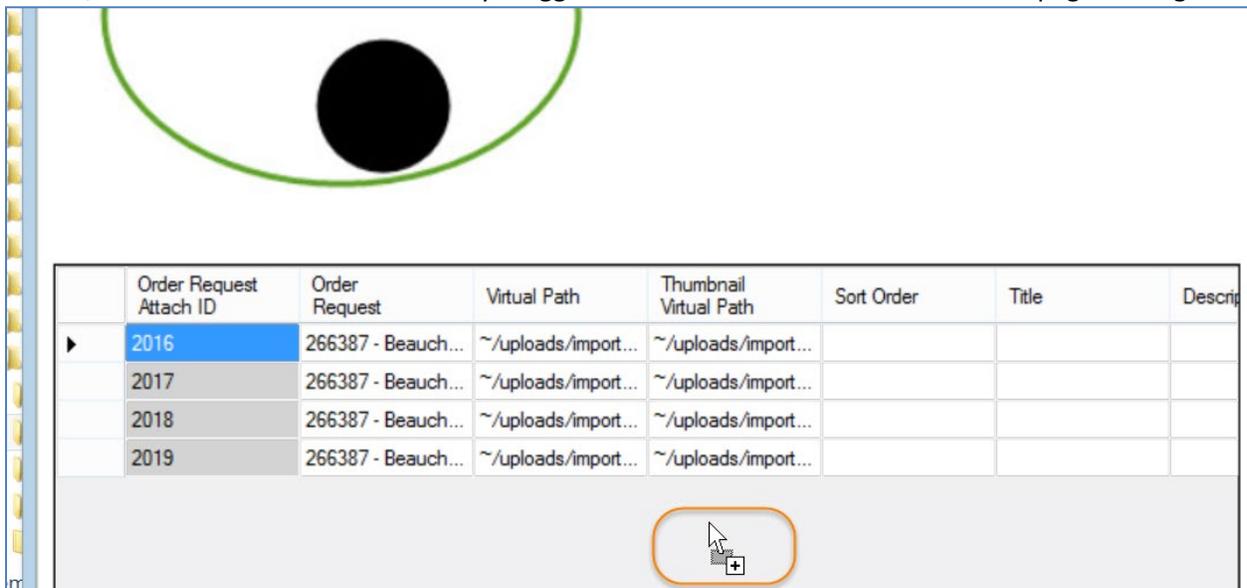
Order Wizard

When it doesn't, it launches the program that recognizes the file. (For example, the Microsoft Word program would launch a .docx file.)



However, after the web order has been shipped (completed) in the CT, the **Browse** button on the Public Website is no longer available and the requester cannot attach additional files or documents. If the requester needs to include additional files with his order, he would need to contact the genebank and email the file(s) directly to the genebank. The genebank person processing the order can still attach documents to a shipped order.

The Order Wizard has an **Attachments** tab page which supports the attachment files. In the Order Wizard, attachment files can be manually dragged onto the Order Wizard Attachments page's datagrid:



Splitting an Order

How to Split an Order

When discussing “splitting an order,” there are two primary ways of speaking about this, splitting:

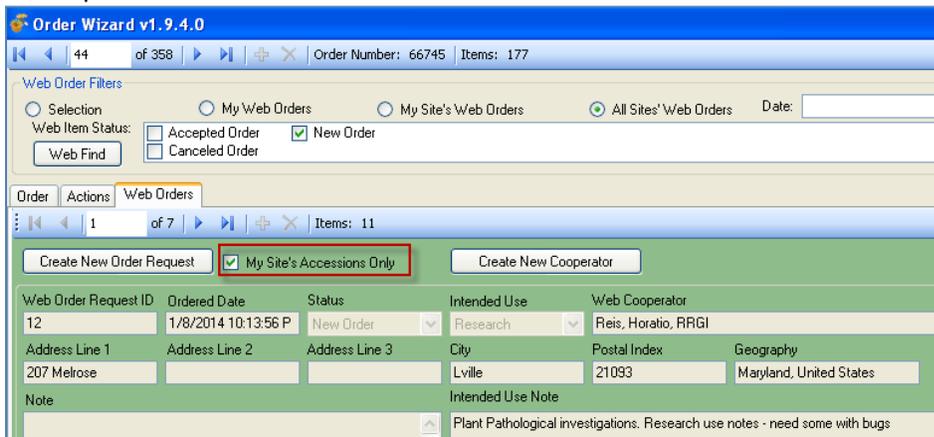
- Incoming web orders
- Partially filled orders when not all of the germplasm is currently available (the unavailable germplasm is moved to a new order to be processed at a later date)

Incoming web orders

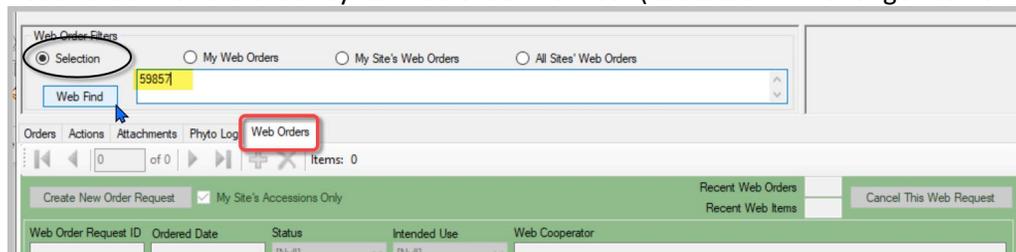
Incoming web orders may have requests for germplasm stored at multiple sites – the first site to process that order will split out their site’s items from the incoming order. Later, the other involved sites will select their parts of the order. A “site” as used here is a GRIN-Global internal site. For example, in NPGS there are approximately 20 physical genebanks that store and distribute germplasm. In other GG organizations, there may be just one site.

Some genebanks may decide for logistical purposes to split the genebank in more than one site, perhaps to keep handle different crops by different genebank departments. The staff responsible for seed distribution may be assigned to one site, and the staff involved with clonal / in-vitro collections may be assigned to a different site.

On the **Web Order** tab, select the **My Site’s Accessions Only** checkbox when the incoming order needs to be split:



When an incoming web order contains requests for germplasm from multiple sites, the first site to process the order will be processing a *new* order. Other sites that later process the order, will need to look for the order by its **Web Order Number** (its status will no longer be new).



Partially Filling Orders

The second reference to “splitting an order” refers to an order processor being split for some reason, such as germplasm not available for part of the order. The order cannot be completely filled, but rather than wait for all the requested germplasm to become available, the processor will “split the order” and send a partial order. (And later send the other germplasm when it becomes available.)



Before splitting, remember that you can select items (accessions) that in the grid by pressing or holding the **Ctrl** or **Shift** keys and clicking the row header cells.

To select **adjacent** rows, click, then while holding the **Shift** key, click in the bottom row's header cell.

To select **non-adjacent** rows, while holding the **Ctrl** key, click on the header cells.

	Order Request Item ID	Order Number	Item Number	Accession	Inventory	Site	Requested Name
	8795530	277395 - Herrera....	4	PI 576547	MIA 34832 PL	MIA	Amin Abrahim
	8795529	277395 - Herrera....	3	MIA 36481	MIA 36481 PL	MIA	Janmari
	8795531	277395 - Herrera....	5	PI 479232	MIA 22458 PL	MIA	POHN SAWA
	8795528	277395 - Herrera....	2	MIA 36784	MIA 36784 PL	MIA	Zill 34-24
	8795527	277395 - Herrera....	1	MIA 36785	MIA 36785 PL	MIA	Zill 0-29

	Order Request Item ID	Order Number	Item Number	Accession	Inventory	Site	Requested Name
	8795530	277395 - Herrera....	4	PI 576547	MIA 34832 PL	MIA	Amin Abrahim
	8795529	277395 - Herrera....	3	MIA 36481	MIA 36481 PL	MIA	Janmari
	8795531	277395 - Herrera....	5	PI 479232	MIA 22458 PL	MIA	POHN SAWA
	8795528	277395 - Herrera....	2	MIA 36784	MIA 36784 PL	MIA	Zill 34-24
	8795527	277395 - Herrera....	1	MIA 36785	MIA 36785 PL	MIA	Zill 0-29

Splitting an Order

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

The screenshot shows the 'Order Wizard v1.8.24.0' application. The 'Order' tab is active, displaying various order details and a table of items. A context menu is open over the table, with 'Item Status...' selected and 'Split out order item' highlighted. A 'Split Order Confirmation' dialog box is overlaid on top, asking for confirmation to split 1 item.

Order Wizard v1.8.24.0

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

Order Details:

- Ordered Date: 9/12/2013 12:00:00 AM
- Owner Site: [Empty]
- Order Type: Distribution
- Original Order: [Empty]
- Final Recipient: Reisinger, Martin, DBMU, 207M, Bville, Maryland, United States
- Local Number: [Empty]
- Status: [Empty]
- Completed Date: [Empty]
- Order Obtained Via: [Empty]
- Requestor: Reisinger, Martin, DBMU, 207M, Bville, Maryland, United States
- Intended Use: Research
- Intended Use Note: Varietal Development. Research use notes - looks like these will be useful
- Ship To: Reisinger, Martin, DBMU, 207M, Bville, Maryland, United States
- Feedback: [Empty]
- Total Cost: [Empty]

Web Order Request Data:

- Web Order Request: 60
- Cooperator: [Empty]
- Email Address: [Empty]
- Phone Number: [Empty]

Special Instructions: [Empty]

Table of Order Items:

Order Request Item ID	Order Number	Item Number	Accession	Inventor	Name	Taxon	Hand	Quantity On Hand Units
24	-4			PI 650342 85nca...	Argentario	Helianthus annuus	28402.00000	count
-26	-4			PI 650340 85nca...	Iregi 816 B	Helianthus annuus	42748.00000	count
-25	-4			PI 650341 85nca...	Iregi Szurke Csiko	Helianthus annuus	25049.00000	count
				PI 650345 85nca...	Novi Sad 20	Helianthus annuus	42730.00000	count
				PI 650346 94nca...	Novi Sad 61	Helianthus annuus	38127.00000	count
				PI 650343 85nca...	Record	Helianthus annuus	29585.00000	count

Context Menu Options:

- Cancel or abort order item
- Shipped order item
- Hold
- Item Status... (selected)
- Reports...
- Split out order item (highlighted)
- Order item is new
- Order item is under processing
- APHIS
- Quality Testing

Split Order Confirmation v1.8.24.0:

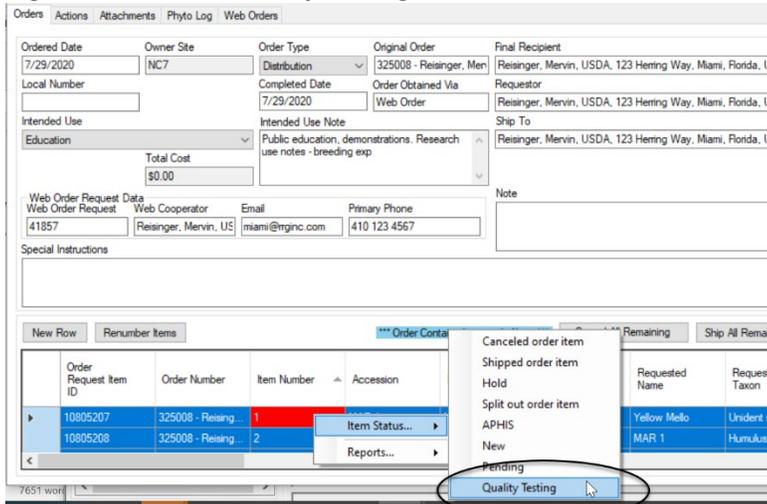
You are about to split 1 items from this order.
Are you sure you want to do this?

Buttons: Yes, No

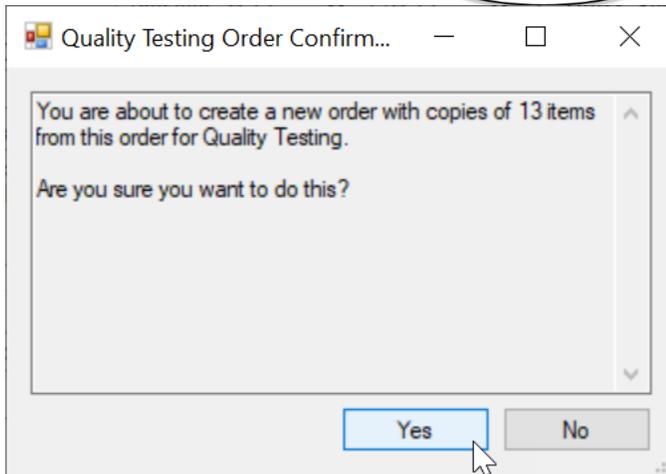
Duplicating an Order

To duplicate an *existing* order, the following steps can be followed:

1. Find the original order in the Search Tool
2. Move the order to the CT
3. Select that order, using the Order dataview
4. Start the Order Wizard
5. Select all of the requested items in the grid;
6. Right click – select **Quality Testing**

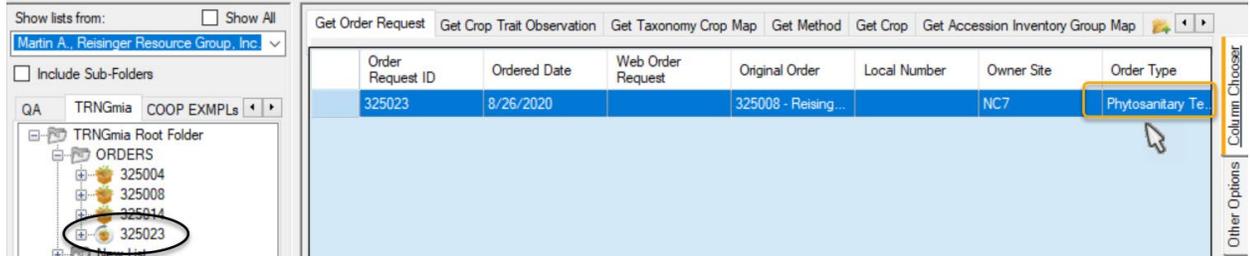


- 7.



Splitting an Order

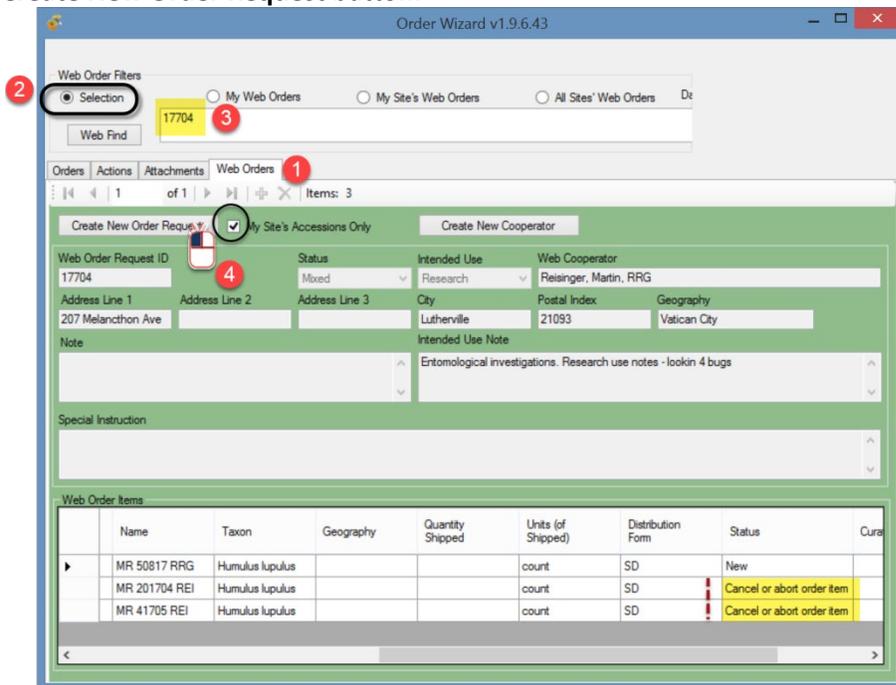
8. In the Order Wizard, Save and Exit. You will be prompted to add an item to the active list. If you affirm that you do, the new order item will be displayed:



The Order Type will be “Phytosanitary Testing.” You most likely will want to change to Distribution.

Undo a Canceled Web Order

If you accidentally cancel a web order, you don’t have an UNDO feature directly, but you can easily recreate the order. Use the Order Wizard. Search for the original Web Order Number, in the example below it was **17704**. Verify that the items are the ones you want placed into an order, and click the **Create New Order Request** button:



Splitting an Order

The Order Wizard will switch to the **Order** tab and display the same web order request items. Save the order; the new order will be assigned its own unique number.

Order Wizard v1.9.6.43

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

Printing: [Printer Icon] Save Save and Exit

Find: [Input Field] [Find Button]

Orders (highlighted), Actions, Attachments, Web Orders

Ordered Date: 5/24/2017
Owner Site: [Input Field]
Order Type: Distribution
Original Order: [Input Field]
Final Recipient: Reisinger, Martin, RRG, 207 Melancthon Ave, Luth [Edit]
Local Number: [Input Field]
Completed Date: [Input Field]
Order Obtained Via: Web Order
Requestor: Reisinger, Martin, RRG, 207 Melancthon Ave, Luth [Edit]
Intended Use: Research
Intended Use Note: Entomological investigations. Research use notes - lookin 4 bugs
Ship To: Reisinger, Martin, RRG, 4620 Pleasant Valley RD, I [Edit]
Total Cost: \$0.00

Web Order Request Data
Web Order Request: 17704
Web Cooperator: Reisinger, Martin, RR
Email: mar@rgrinc.com
Primary Phone: 410-666-0100

Note: [Input Field]

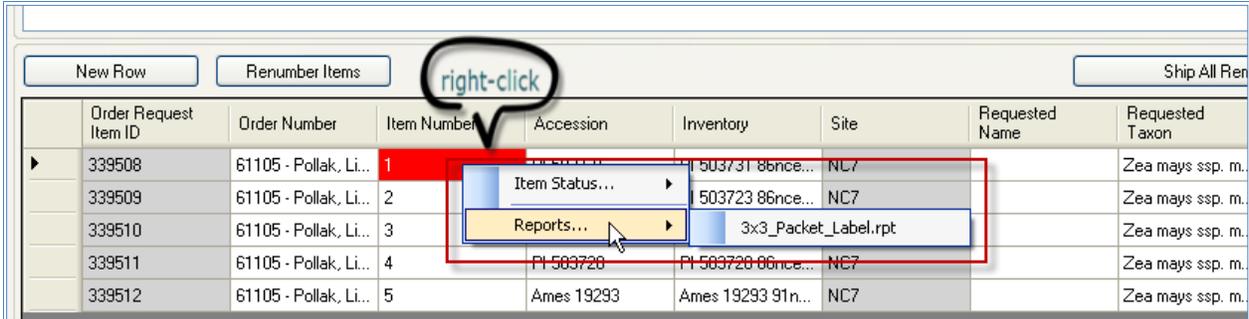
Special Instructions: [Input Field]

New Row Renumber Items Ship All Remaining Items

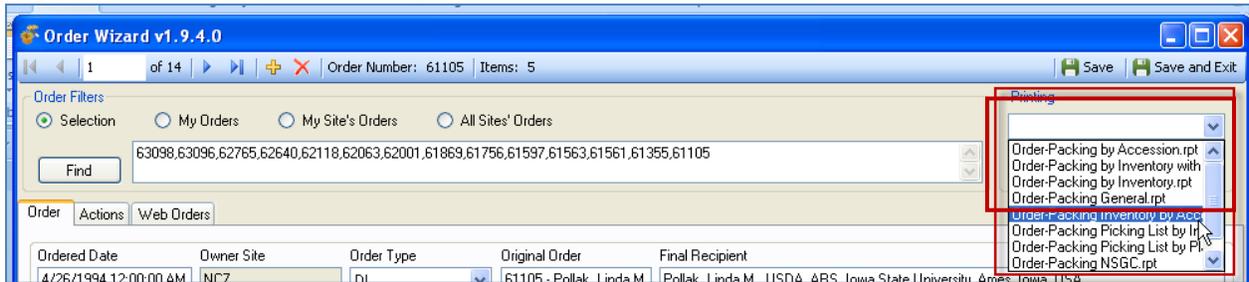
Order Request ID	Order Number	Item Number	Accession	Inventory	Site	Requested Name	Requested Taxon
-1	-1	1	MR 201704 REI	MR 201704 REI ...	NC7	MR 201704 REI	Humulus lupu
-2	-1	2	MR 41705 REI	MR 41705 REI2 ...	NC7	MR 41705 REI	Humulus lupu

Reports

Beginning in CT v 1.9.4, when selecting reports in the grid, only reports that can be printed for selected individual items will be listed in the menu. Packing slips, picking slips, and other order-related reports may be launched via the Order Wizard **Printing** dropdown shown in the second illustration).



Beginning in CT v 1.9.4, the **Printing** dropdown has a list of relevant reports from which to select.



Appendix A: Canceling Web Orders

(This functionality was added to server versions 1.9.9.0 and higher.)

The following method circumvents using the Order Wizard to open an incoming weborder when you simply intend to cancel items. The method can be used to cancel an incoming web order, even when the web order is being sent to multiple sites.

When you complete the steps in the following directions, your site’s portion of the web order will have each of its items marked as **CANCELLED**. On multiple site orders, the web order *record’s* status will display as **MIXED**. Depending on how many sites have received the web order, the individual items may have many different statuses.

The advantage of this method, rather than process the order thru the Order Wizard, is that several steps may be avoided, saving some time. If the requestor is a new requestor, a new cooperator record is not unnecessarily created. Later, when using the Order Wizard to find New Web order, it will display web orders with a MIXED status.

A Web Order is Submitted

As usual, after an order has been submitted on the Public Website, the user can check the status of their order under their **Profile | My Order History**. A new order is displayed with a **SUBMITTED Order Status**:

Confirmation of Orders

Order Detail Number: 17695 **Order Status:** Submitted

Requestor: Martin Reisinger
RRG
Phone: 410-666-0100
FAX:

Ship To: 4620 Pleasant Valley RD
Not in the barn
Oakland, Maryland 20193, United States

Ordered Items:

ID	Plant Name	Taxonomy	Distribution Amt	Form Distributed	Maintained by
PI 588752	IRA 38-1	Malus x platycarpa	2	Scion	GEN
PI 588755	William Sim	Malus hybr.	2	Scion	GEN
PI 500000	Purplestraw	Triticum aestivum subsp. aestivum	5	Seed	NSGC
MR 201704 REI	MR 201704 REI	Humulus lupulus	25	Seed	NCT
MR 41705 REI	MR 41705 REI	Humulus lupulus	25	Seed	NCT

Intended use for this germplasm:
HOME:

Special instructions for the order:
I need to teech my childrn well.

The site's germplasm staff person processing incoming weborders receives the email confirming the weborder and items being requested:

New order from the web (shopping cart).

Germplasm Request - Order ID: 17695

Martin Reisinger
RRG
207 Melancthon Ave
Lutherville, 21093
Vatican City
410-666-0100
mar@rrginc.com

Shipping Address:

Martin Reisinger
4620 Pleasant Valley RD
Not in the barn
Oakland, Maryland 20193

Instructions:
I need to teech my childrn well.

Intended use of material:
Home Gardening:

Items:
1 MR 201704 REI - NC7 - Humulus lupulus
2 MR 41705 REI - NC7 - Humulus lupulus
3 PI 500000 - NSGC - Triticum aestivum subsp. aestivum
4 PI 588755 - GEN - Malus hybr.
5 PI 588752 - GEN - Malus x platycarpa

Displaying Lists of Weborders

In the Curator Tool, establish a folder and use the following code as the basis for your Dynamic Folder's query: **@web_order_request.web_order_request_id = 17695**
The number shown in red is the weborder.

Alternatively, more involved criteria could be set up for your dynamic query. For example, use a query based on a date range:

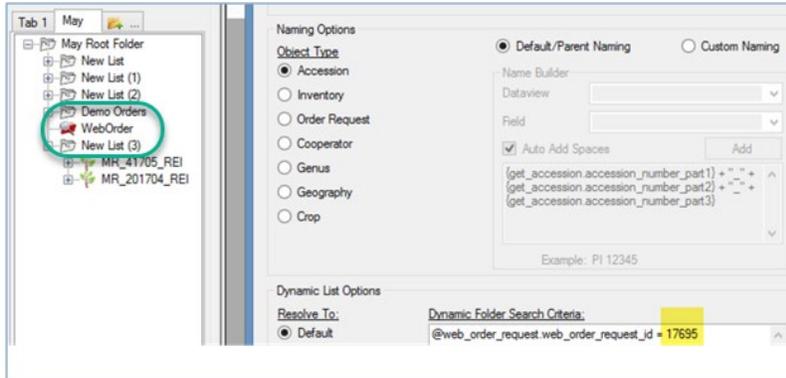
@web_order_request.ordered_date BETWEEN '8/1/2017' AND '8/11/2017'

or your site code, and the web_order_request_item.status_code:

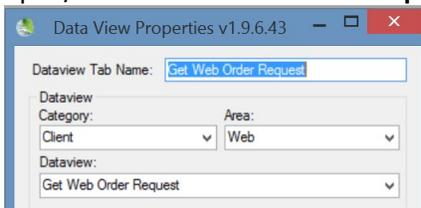
@site.site_short_name = 'NC7'
AND @web_order_request_item.status_code = 'NEW'

You can of course use the Search Tool to search, using the **web_order_request** dataview, to find the web order. Then drag the web order record into the Curator Tool.

Appendix A: Canceling Web Orders



Open/Use the **Get Web Order Request** dataview:



The weborder will initially be displayed with a **New Order** Status:

Crop Trait	Accession Inventory Attach	Taxonomy Common Name	Crop Trait Observation	Order Request Phyto Log	Get Web Order Request
	Intended Use	Intended Use Note	Status	Note	Special Instruction
▶	Research	Entomological investigations. Research use notes - likn 4 bugs	New Order	need asap	8/11/2017 10:58...

In Edit mode, open the Status dropdown and select **Canceled Order**:

Crop Trait	Accession Inventory Attach	Taxonomy Common Name	Crop Trait Observation	Order Request Phyto Log	Get Web Order Request
	Ordered Date	Intended Use	Intended Use Note	Status	Note
▶	8/11/2017 2:58 ...	Research	Entomological investigations. Research use notes - likn 4 bugs	New Order	need asap
				<ul style="list-style-type: none"> (None) Canceled Order New Order Reviewing 	

Crop Trait	Accession Inventory Attach	Taxonomy Common Name	Crop Trait Observation	Order Request Phyto Log	Get Web Order Request
	Ordered Date	Intended Use	Intended Use Note	Status	Note
▶	8/11/2017 2:58 ...	Research	Entomological investigations. Research use notes - likn 4 bugs	Canceled Order	need asap

When saved, the **Web Order Request Status** changes to **Canceled Order** or **MIXED**, depending on whether the order was a single-site or multiple-site order:

Ordered Date	Intended Use	Intended Use Note	Status	Note	Special Instruction
8/11/2017 2:58 ...	Research	Entomological investigations.	Canceled Order		need asap

Ordered Date	Intended Use	Intended Use Note	Status	Note
5/8/2017 7:48 PM	Home Gardening		MIXED	

The germplasm requestor will see this status if he checks his order on the Public Website. The site’s individual items will be listed with their **Item Status** as **CANCEL**. A relevant **Action** record will also be generated.

Order Detail Number: 17695	Order Status: MIXED				
Requestor: Martin Reisinger RRG PHONE: 410-666-0100 FAX:	Ship To: 4620 Pleasant Valley RD Not in the barn Oakland, Maryland 20193, United States				
Ordered Items (5 items):					
ID	Plant Name	Taxonomy	Form Distributed	Item Status	Maintained by
PI 588752	IRA 38-1	Malus x platycarpa	Scion	NEW	GEN
PI 588755	William Sim	Malus hybr.	Scion	NEW	GEN
PI 500000	Purplestraw	Triticum aestivum subsp. aestivum	Seed	NEW	NSGC
MR 201704 REI	MR 201704 REI	Humulus lupulus	Seed	CANCEL	NC7
MR 41705 REI	MR 41705 REI	Humulus lupulus	Seed	CANCEL	NC7
Intended use for this germplasm: HOME:					
Special instructions for the order: I need to teech my childrn well.					
You may have ordered accessions from more than one NPGS site and your order maybe split between sites and m You may receive your material in several shipments.					
Order Request Actions:					
Action Date	Action Step	Action Note			
May 8, 2017	CANCEL	2 items canceled by maintenance site NC7			



Changing the **Status** field in the **Web Order Request** to “Canceled Order” changes the **Status** to **MIXED** after the **Web Order Request** record is saved, but *only the items in the web order for your site* have their individual item status changed to **CANCEL**.

Appendix A: Canceling Web Orders

If you have searched using the code:

@site.site_short_name = 'NC7'

AND @web_order_request_item.status_code = 'NEW'

(using your site's code)

and the status of the corresponding **Web Order Request** is already "MIXED," you can still use this method to also cancel your site's items.

Edit the **MIXED** status, and select

Web Order Request ID	Web Cooperator	Status	Last Name	Title	First Name	Orga
37593	West, Lisa, West...	MIXED	West	Mrs.	Lisa	West
37709	goodman, rebe...	MIXED	goodman	Mrs.	rebeca	good
37707	goodman, rebe...	MIXED	goodman	Mrs.	rebeca	good
37748	Coward, Eryn, De...	Reviewing	Coward		Eryn	Depa

In Edit mode, the status will show as [null]. Select **Canceled Order** and save the record(s):

Web Order Request ID	Web Cooperator	Status	Last Name	Title	First Name	Organi
37593	West, Lisa, West...	[Null]	West	Mrs.	Lisa	West hc
37709	goodman, rebe...	[Null]	goodman	Mrs.	rebeca	goodma
37707	goodman, rebe...	[Null]	goodman	Mrs.	rebeca	goodma
37748	Coward, Eryn, De...	[Null]	Coward		Eryn	Departm
37699	Frantz, Cornelius,...	New Order	Frantz		Cornelius	New Co
37712	Smith, Leah, Ch...	Reviewing	Smith		Leah	Cheswa



As discussed above, a MIXED **Web Order Request** may have individual items with different statuses. The following code could be used to find an extensive list of incoming web orders. The results of the above query will include all of the **Web Order Request** statuses:

```
(
@web_order_request.status_code = 'SUBMITTED' OR
@web_order_request.status_code = 'ACCEPTED' OR
@web_order_request.status_code = 'CANCELED' OR
@web_order_request.status_code = 'MIXED')
```

AND @web_order_request.created_date > '31-Dec-2019'

AND @web_order_request.created_date < '1-Jan-2021'

AND

@web_order_request_item.status_code = 'NEW'

AND

@site.site_short_name = 'NA'

Using this code, substituting your site code and desired date, will find all of the incoming web orders.

Listing Web Orders Using SQL

In the Public Website's **Tools | Web Query** utility, use the following SQL to look for incoming web orders with a status of **MIXED**

```
SELECT wor.web_order_request_id, o.order_request_id, wor.ordered_date, wu.user_name,
wc.last_name, wc.first_name
FROM web_order_request wor
JOIN web_cooperator wc
    ON wor.web_cooperator_id = wc.web_cooperator_id
JOIN web_user wu
    ON wor.created_by = wu.web_user_id
LEFT JOIN order_request o
    ON wor.web_order_request_id = o.web_order_request_id
JOIN web_order_request_item wori
    ON wor.web_order_request_id = wori.web_order_request_id
JOIN accession a
    ON wori.accession_id = a.accession_id
JOIN cooperator c
    ON a.owned_by = c.cooperator_id
JOIN site s
    ON c.site_id = s.site_id
/* Edit date and site */
WHERE wor.ordered_date >= '2017-07-30'
/* AND wor.ordered_date < '2016-06-01' */
AND s.site_short_name = 'GEN'
AND wor.status_code = 'MIXED'
/* or change to search by username (email address of requestor
WHERE wu.user_name = 'requestor email address' */
GROUP BY wor.web_order_request_id, o.order_request_id, wor.ordered_date, wu.user_name,
wc.first_name, wc.last_name
```

Example – Two Sites Cancel Their Respective Portions of the WebOrder

Confirmation of Orders

Order Detail Number: 17697	Order Status: Submitted				
Requestor: Martin Reisinger RRG Phone: 410-666-0100 FAX:	Ship To: 4620 Pleasant Valley RD Not in the barn Oakland, Maryland 20193, United States				
Ordered Items:					
ID	Plant Name	Taxonomy	Distribution Amt	Form Distributed	Maintained by
PI 588752	IRA 38-1	Malus x platycarpa	2	Scion	GEN
PI 588755	William Sim	Malus hybr.	2	Scion	GEN
PI 500000	Purplestraw	Triticum aestivum subsp. aestivum	5	Seed	NSGC
MR 201704 REI	MR 201704 REI	Humulus lupulus	25	Seed	NC7
MR 41705 REI	MR 41705 REI	Humulus lupulus	25	Seed	NC7
MR 50817 RRG	MR 50817 RRG	Humulus lupulus	25	Seed	DBMU

1st Site Cancels

Ordered Items (6 items):

ID	Plant Name	Taxonomy	Form Distributed	Item Status	Maintained by
PI 588752	IRA 38-1	Malus x platycarpa	Scion	NEW	GEN
PI 588755	William Sim	Malus hybr.	Scion	NEW	GEN
PI 500000	Purplestraw	Triticum aestivum subsp. aestivum	Seed	NEW	NSGC
MR 201704 REI	MR 201704 REI	Humulus lupulus	Seed	CANCEL	NC7
MR 41705 REI	MR 41705 REI	Humulus lupulus	Seed	CANCEL	NC7
MR 50817 RRG	MR 50817 RRG	Humulus lupulus	Seed	NEW	DBMU

Intended use for this germplasm:
HOME:

2nd Site Cancels

Ordered Items (6 items):

ID	Plant Name	Taxonomy	Form Distributed	Item Status	Maintained by
PI 588752	IRA 38-1	Malus x platycarpa	Scion	NEW	GEN
PI 588755	William Sim	Malus hybr.	Scion	NEW	GEN
PI 500000	Purplestraw	Triticum aestivum subsp. aestivum	Seed	NEW	NSGC
MR 201704 REI	MR 201704 REI	Humulus lupulus	Seed	CANCEL	NC7
MR 41705 REI	MR 41705 REI	Humulus lupulus	Seed	CANCEL	NC7
MR 50817 RRG	MR 50817 RRG	Humulus lupulus	Seed	CANCEL	DBMU

Intended use for this germplasm:
HOME:

Appendix B: Document Revision Notes

– April 7, 2023

- Added tip regarding the Order Wizard’s default **My site’s accessions only** checkbox

– March 3, 2023

- Major revamping of document to include recent screen changes and options

– March 2, 2021

- added screens regarding using the Inventory Picker to select specific inventory

– July 31, 2020

- added references to the revised Order Wizard from v. 1.9.9.4
- add a tip regarding duplicating an order

– March 31, 2020

- provided more code and screen examples for the canceling process when not using the Order Wizard

– February 20, 2020

- added note regarding attachments – users can only see attachments they have added to their order

– September 29, 2017

- link added in the Canceling Incoming Web Orders section in the main body of text to point to the *Canceling Web Orders* section (Appendix B)

– August 11, 2017

- added *Canceling Web Orders* section (Appendix B)

– November 8, 2016

- added more examples for finding orders using the Public Website (Appendix A)

– June 9, 2016

- added canceling web orders section

– May 27, 2016

- added graphic and note for selecting multiple items

– February 19, 2016

- added detailed search instructions for listing web orders and orders

– February 17, 2016

- added detailed information and notes pertaining to drag and drops
- included additional screens
- added a section on searching for the **Completed Date**

– June 9, 2015

- added detailed information about order attachments

– May 28, 2015

- added information about editing items in the grid

– March 13, 2015

- extensive editing
- screen captures included from 1.9.6.41