

New PH User Guide

This guide goes over some of the basics for getting started with Pure Harvest.

Logging In

To log in to the Application, you will need to use the Link provided to you by Support. You should also have been given the Username and Password you will need to login. For the first time logging in from a particular machine, you will need to enter the security code. (Using the Image below as an example you would enter “beauda”)



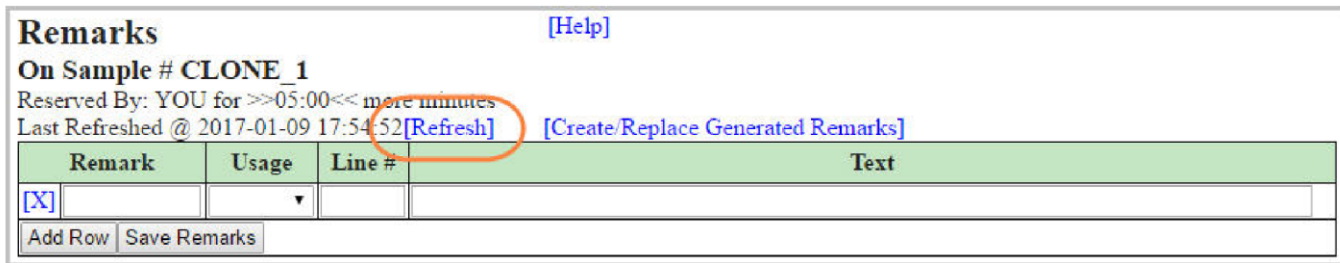
The image shows a login form for Pure Harvest. At the top is the Pure Harvest logo. Below it are three input fields: "User Name:", "Password:", and "Database:". Below these is a security code image showing the word "BEAUDA" in a stylized font. Below the image is a "Security Code" input field and a "Log In" button.

User Interface Features

There are many different features in the User Interface that are common across various pages and forms.

Some common ones include:

- The [Refresh] Link - This link appears at the top of any given section of a page. Its purpose is to reload just that section, bringing the most recent data back into the form from the database.
 - It is mostly for when you may have left a page up for sometime, and want to make sure what you see on the screen is up to date before entering new information, or changing whats there



The image shows a screenshot of a "Remarks" form. At the top left is the title "Remarks" and a "[Help]" link. Below the title is the text "On Sample # CLONE_1". Underneath that is "Reserved By: YOU for >>05:00<< more minutes" and "Last Refreshed @ 2017-01-09 17:54:52". There are two links: "[Refresh]" (circled in orange) and "[Create/Replace Generated Remarks]". Below this is a table with columns: Remark, Usage, Line #, and Text. The first row has a "[X]" button in the Remark column and a dropdown arrow in the Usage column. At the bottom are "Add Row" and "Save Remarks" buttons.

- Auto Lookups - Many of the input fields will automatically bring back matches as you type. To see all things in the lookup field type “%%”
 - Any time you see a Magnifying glass inside of the input box, it means there is an Auto Lookup feature. These are always on places where you enter an Associate, Crop, or Variety, but may also be on other things as well. The image below shows the Auto Lookup on the Predefined Remarks.

Remark	Usage	Line #	
[X] %%			
Add	<div style="border: 1px solid gray; padding: 5px;"> <p>im:belcss OTHD (Inert matter: Broken seed, empty florets, leaves, cha</p> <p>im:beles OTHD (Inert matter: Broken seed, empty florets, leaves, erg</p> <p>im:belsc OTHD (Inert matter: Broken seed, empty florets, leaves, ste</p> <p>im:belsc OTHD (Inert matter: Broken seed, empty florets, leaves, ste</p> <p>im:belss OTHD (Inert matter: Broken seed, empty florets, leaves, scl</p> <p>im:besc OTHD (Inert matter: Broken seed, empty florets, stems, cha</p> </div>		

Some forms only allow you to edit a single row, such as the Sample or Seed Lot information. Other forms allow you to add or edit multiple rows, like Sample Remarks or Viability Counts. On forms that allow you to enter multiple rows, you will see an “Add Row” button which opens up another row on that form, and a [X] link that allows you to delete a row.

Initial Setups

This section will go over the various things you may need to setup before entering samples, such as entering your customers information, defining crops & varieties, setting up the tests you will be performing on samples, and setting up any predefined remarks you may wish to add to reports.

Setting up Users

See Application Users for Details.

On the application users screen you can set up individual users for your staff, and assign each user a security level, denoting what pages they will or will not be allowed to access.

Entering Customer Info

See Associates for Details.

The associates screen is where you will enter your customer information including Email Address for the various types of Email that are sent out via Pure Harvest (Invoices, Lab Reports, Lab Schedules, etc.).

You may also want to setup a username and password for the customer so they can access their results online via the Customer Online Access portal.

See the Customer Access Guide for more info on setting up the online access for your customers.

Setting up Tests & Groups

See Test Definitions and Test Groups for details.

Many Tests are predefined in the system such as Germination, Purity, and TZ test. If there is a test your lab performs that is not already in the system, you can add it from the Test Definitions screen. Along with defining the test, you can set how the test is used. For example, if the test is a type of Viability test, there is box you can check off labeled “Can be entered on the Results→Viability portion of the Sample Screen”.

Often new tests you define do not have a predetermined spot to be shown on the Analysis Report, so you may also need to select the “Appears in the Other Determinations” section of the Lab Report box.

If you frequently perform the same set of tests on a sample, you may want to add a Test Group so you can quickly add all the tests to a sample at once, instead of individually selecting each test when creating the sample. This can be done from the Tests In Groups screen.

Defining Remarks

See Define Remarks For Details.

You may also wish to include other statements or “remarks” to the sample. You can manually enter any remark you want on the sample itself, or you can predefine certain remarks that can be quickly looked up and added to an existing sample. For each remark, you can also specify a Remark Type. The Type of remark tells Pure Harvest what to do with that remark. For instance, “SAMR” or Sample Remark, is a remark that will be printed on the Lab Report whereas “OFFN” is an Office Note and will not appear on any reports that go to the customer. See the Define Remarks page for a complete list of the different types of remarks you can define.

In addition to the Predefined remarks you may wish to create there are a number of Remarks that Pure Harvest can generate for a sample for different purposes. For example, Pure Harvest can create a remark that states what rules and standards a sample was tested under (AOSA, Ista, Canadian).

Entering Samples

See the Sample Processing Guide

Billing

When using Pure Harvest for Billing, you can set up fees for various tests or services performed on that sample. Fees can be defined as flat rate for each sample, or varying fees based on the crop or group of crops.

After you have setup the Pricing for tests and services, Pure Harvest will use these to create charges for a sample that will be included when you create an invoice.