Ministry of Forests and Range

SPAR—Entering Seedling Requests

Participant Guide

Version 1.0

SPAR

Release 0.4

Fall 2007

Table of Contents

Topic 1—Introduction & Course Overview

Purpose

This course will provide you with an overview of how to use the Seed Planning and Registry System (SPAR) version 0.4 for adding or changing seedling requests.

Learning Objectives

Upon completion of this course you will be able to:

- Understand the business cycle of a request (including the status codes associated with requests);
    - How to search for a request key;
    - How to enter and update a seedling request;
    - How to approve, cancel, and delete a seedling request;
    - How to recognize overrides; and,
    - Use reports related to seedling requests.

Course Structure

This course is a two hour learn-linc session. The session includes demonstrations of how to work in the system as well as an opportunity to ask questions. There are practice scenarios in this Participant Primer for you to practice concepts after the training is completed.

Target Audience

This training is intended for:

- New users of SPAR; and,
- Existing SPAR users who require a refresher.

Explanation of Icons

Training Icon	Description
	This symbol denotes a key point. This is an important point that you should pay close attention to.
	This symbol denotes a warning or caution. This is important information or training around tasks that you "should not do" or "be very careful doing".
	When you see this symbol, there is a practice exercise which will allow you to try out activities in the SPAR Test Environment. (**http://testapps.for.gov.bc.ca/spar/**)

Topic 2—Adding a Seedling Requests

Overview

SPAR automates the Seedling Request process allowing you to enter initial seedling requests via the web, modify these requests and monitor them throughout their business cycle.

Understanding the Request Business Cycle

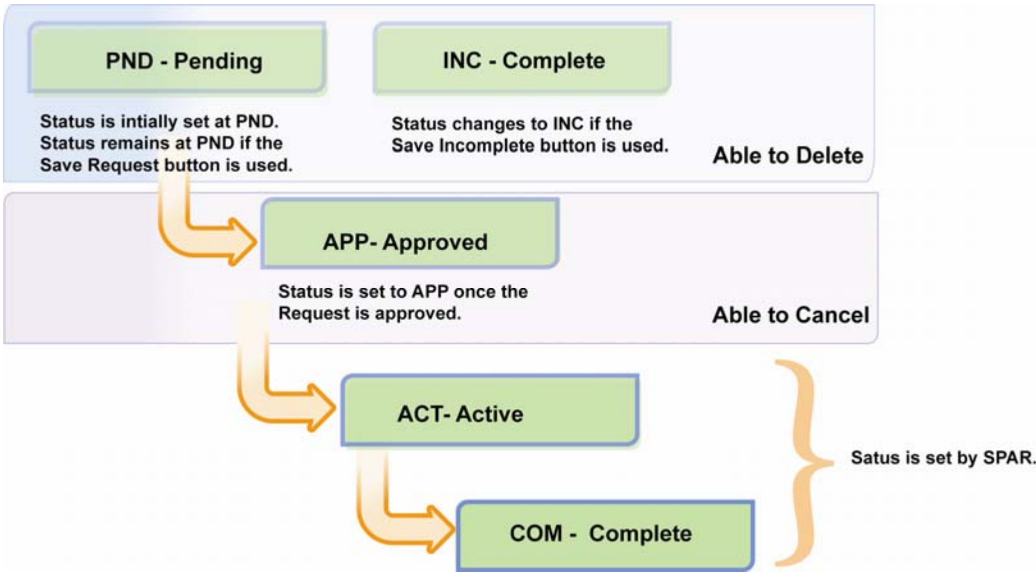
A request is simply an order of seed or cutting material. Requests are entered and tracked in the SPAR system. Many forms and functions in SPAR are used during the request process. It is important to note that the actions that you can perform using these request functions are limited by:

- the **security** that you have been assigned in SPAR (see **Appendix A** for a list of all the security levels available in SPAR) ; and,
- the current **status** of the request.

Read the following table carefully so that you have a solid understanding of each of the **Request Status Codes**.

Code	Description
ACT	Active - currently in effect or in use. ACT indicates that an action has taken place on a Seedlot. For example, the seed is in stratification. You cannot use DELETE nor CAN mode once the status is ACT, unless you have the proper authority. ACT is system set at the Tree Seed Centre.
APP	Approved - given official sanction. Use APP to approve seedling requests. Requests can only be approved one year in advance. If the status is APP, you cannot use DELETE mode. Use CAN status to cancel. If the status is APP, it cannot be returned to PND. APP is set by the user.
CAN	Cancelled - to make no longer effective. Use CAN to cancel an approved request. CAN is set by the user.
COM	Complete - fulfillment of all processes. COM indicates that a Seedlot has been shipped to the nursery. COM is system set at the Tree Seed Centre
INC	Incomplete - in process but not finalized. Use INC when not all of the information is available. When the status is INC, you can use DELETE mode. Seedlot selection information will not be stored if the status is INC. INC is set by the user.
PND	Pending - awaiting conclusion or confirmation. Use PND for future planning or for requests awaiting approval. When the status is PND, you can use DELETE mode. PND is set by the user.

The request status of the seedling request changes as the request moves through the business cycle as shown in the diagram below. Note that the request starts with a status of **Pending**. If all information is not available, you can use the **Save Incomplete** button to save the request with a status of **Incomplete**. Once you have selected a Seedlot or Vegetative Lot, the **Save Request** button can be used to move the status from **Incomplete** back to **Pending**.



How is a Status Changed?

You will learn about how to perform status changes later in this guide. However, it is important to understand that a status is changed at various points in the business cycle depending on actions performed by the user or the Tree Seed Centre. The table below provides an overview of how a status is changed in SPAR.

Status	Set by…
INC	Clicking the Save Incomplete button on the Seedling Request page.
PND	The original status of the Seedling Request. If the status changed to INC it can be changed back to PND by clicking the Save Request button on the Seedling Request page.
APP	Clicking the Approve button on the Seedling Request page or approving the request using the Seedling Request Approval page.
ACT	Set by the Tree Seed Centre.
COM	Set by the Tree Seed Centre.
CAN	Clicking the Cancel Request button on the Seedling Request page.

When Can a Request No Longer Be Modified?

There is a point when a request can no longer be modified by a user. This varies based on whether or not the request is **ministry** funded.

- For non-ministry funded requests, a user can update a request while it is APP, but not once ACT.
- For ministry funded requests, a request can be modified while it is APP status, but once it has been assigned to a tender by BC Timber Sales Headquarters, it can not be modified by the user. The tender information appears on the Request Status screen.

Searching for a Request Key

What is a Request Key?

A Request Key for Seedling Requests is an 11 character code for the Request Order that includes the sowing year (four digits), organizational unit (three characters) and a 4 digit counter that is assigned sequentially for each Org Unit and Sowing Years. All Sowing Years begin July 1st. The Request Key is generated by the system when valid data is entered.

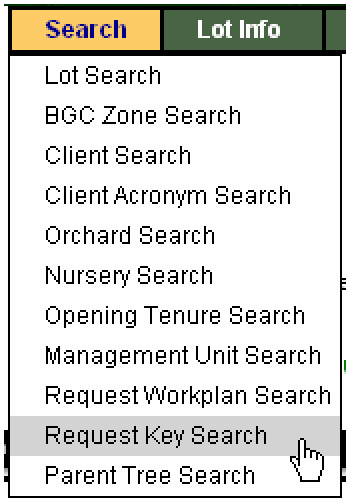
The Request Key for other requests is formed form the Request Type (three characters), the Request Year (four digits) and a 4 digit sequential counter.

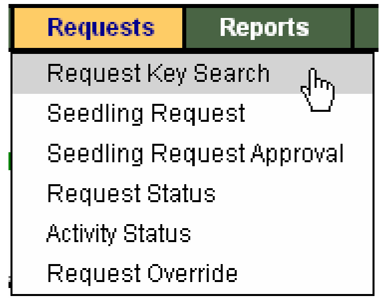
How do I find Request Keys in SPAR?

The Request Key search allows you to search for Request Keys in SPAR. You can use this search to find Request Keys which are associated with your agency in SPAR. The following steps explain how to use this search:

Topic 2—Adding a Seedling Request

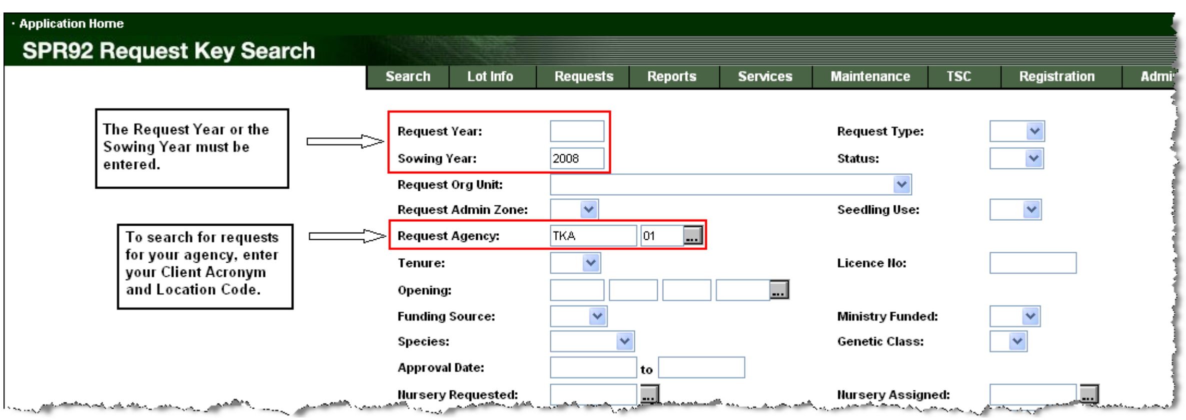
1. Navigate to the **Search** or **Request** tab and select **Request Key Search**.





2. Enter either the **Sowing Year** or **Request Year**. It is mandatory to enter one of these fields. The Sowing Year field will default to the current Sowing Year. A Sowing Year runs from August 1st of one calendar year to July 31st of the following calendar year. A request year is based on the calendar year.

3. If you wish to search for Requests your agency has entered, then enter your **Agency Acronym** and **Location Code** in the **Request Agency** field. If you are a non-ministry client, your Client Acronym or Number will default in the Request Agency Field. If you are a nursery, your Nursery Acronym will default in the Assigned Nursery Field.



4. Enter any additional fields you wish to use to narrow your search.

5. Click the **Search** button.

Topic 2—Adding a Seedling Request

6 Examine the results.

Seedlings Requested is displayed in thousands; Quantity Requested is displayed in Grams of Seed for SeedLots and No. of cuttings in thousands for Vegetative Lots.

4 rows returned

Request ID	Status	Request Agency	Seedlings Requested	Quantity Requested	Lot Number	Species	Stock Type	Container Type	Stock Age	Override	
2008DKA0015	APP	TKA 01	9.5	513	60785	PW	PSB	412A	100000		Details
2008DKA0011	APP	TKA 01	2.4	25	39160	LW	PSB	512A	100000		Details
2008DKA0010	APP	TKA 01	5.6	112	41095	FDI	PSB	512A	100000	TGE*	Details
2008DKA0008	APP	TKA 01	6.2	43	60776	SX	PSB	412A	100000	TGE*	Details

7 You can click the Details button to examine the corresponding request's details further. This navigates you to the **Seedling Request** page which is discussed later in this guide.

If you leave all the non-mandatory search fields blank the search results show all the Requests that match the Sowing Year/ Request Year you entered. The more search parameters entered, the narrower and more precise your search results become.

Practice Exercise A: Finding a Request Key

Exercise Instructions

Using the Request Key Search function, practice searching for requests that meet the following criteria:

- Are for the current Sowing Year.
- Match your Agency and Location.

Adding a New Seedling Request

Using the Seedling Request Form

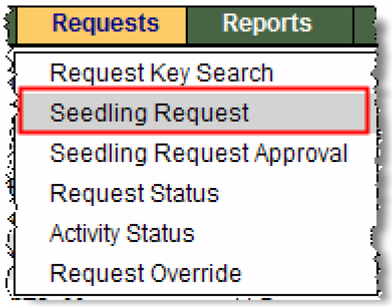
There are two main forms that are used to add/update Seedling Requests. These are the **Seedling Request Form** and **Lot Selection Form**. These forms will allow you to:

- Order seed or cutting material by adding a new seedling request.
- View and update an existing seedling request. Including information about a request such as status, activities, overrides, and commitments.
- Change the status of a request, delete a request, or cancel a request.

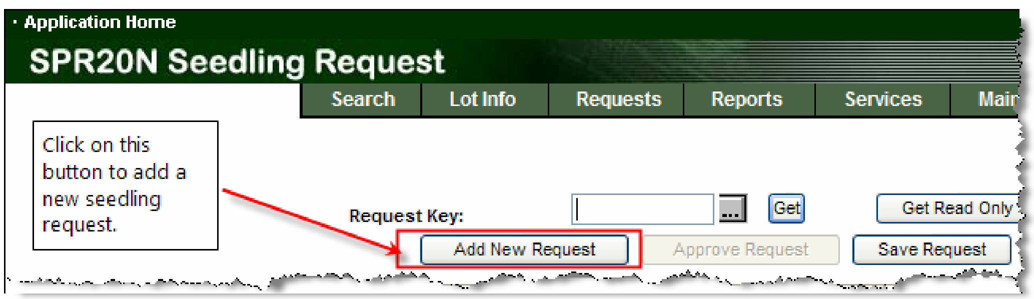
- View transfer guide exceptions and sowing rule exceptions.

The following steps will guide you through the process of adding a request:

1 Click on the **Requests** tab and select **Seedling Request**.



2 Click on the **Add New Request** button.



3 Enter data into all mandatory fields (indicated with an ★) for the request information:

- Sowing Year
- Status – The status will default to **Pending**.
  - You may not edit this field. The status is changed according to the business cycle of the request as outlined earlier in this guide.
  - Note: when you add a request with a Pending status, the seed quantity is ordered for each Seedlot or the number of cuttings for each Vegetative Lot is committed to that request.
- Request Org Unit
- Seedling Use
- Request Agency
- Crown Land
- Subject To
- Funding source
- Management Unit Type and ID (note: ID is required for a Management

Unit which is a TSA or TFL)

- Species
- Elevation Min
- Elevation Max
- Latitude
- Longitude
- Seed Planning Zone A (for select species)
- Seed Planning Zone B
- No. of Seedlings (000's)
- Stock Type
- Container Type
- Stock Age
- Planting Year
- Season

You may enter data into the non-mandatory fields if you wish to further refine your request.

Note:

There are a number of new functions on this page that should make entering a request easier. These include the following:

- + or – Tenure Section: Note that the Tenure section of this page can be expanded or contracted using the + or - link. Only the mandatory fields of Management Unit Type and Unit ID are displayed when this section is contracted.
- Default SPZ Button: Click this button to automatically populate the Seed Planning Zone field(s) and the BGC Zone, Subzone and Variant. The details displayed will correspond with the planting location information you have entered. Note that you must enter the Latitude and Longitude fields in order for this button to function.
- SeedMap Button: Clicking the **SeedMap** button opens the **SeedMap** Application in a new browser window. SeedMap opens to display the geographic location of the planting site that corresponds with your request.

Ensure that you have entered the appropriate information for the Tenure. **One** of the following must be entered for the **Tenure**:

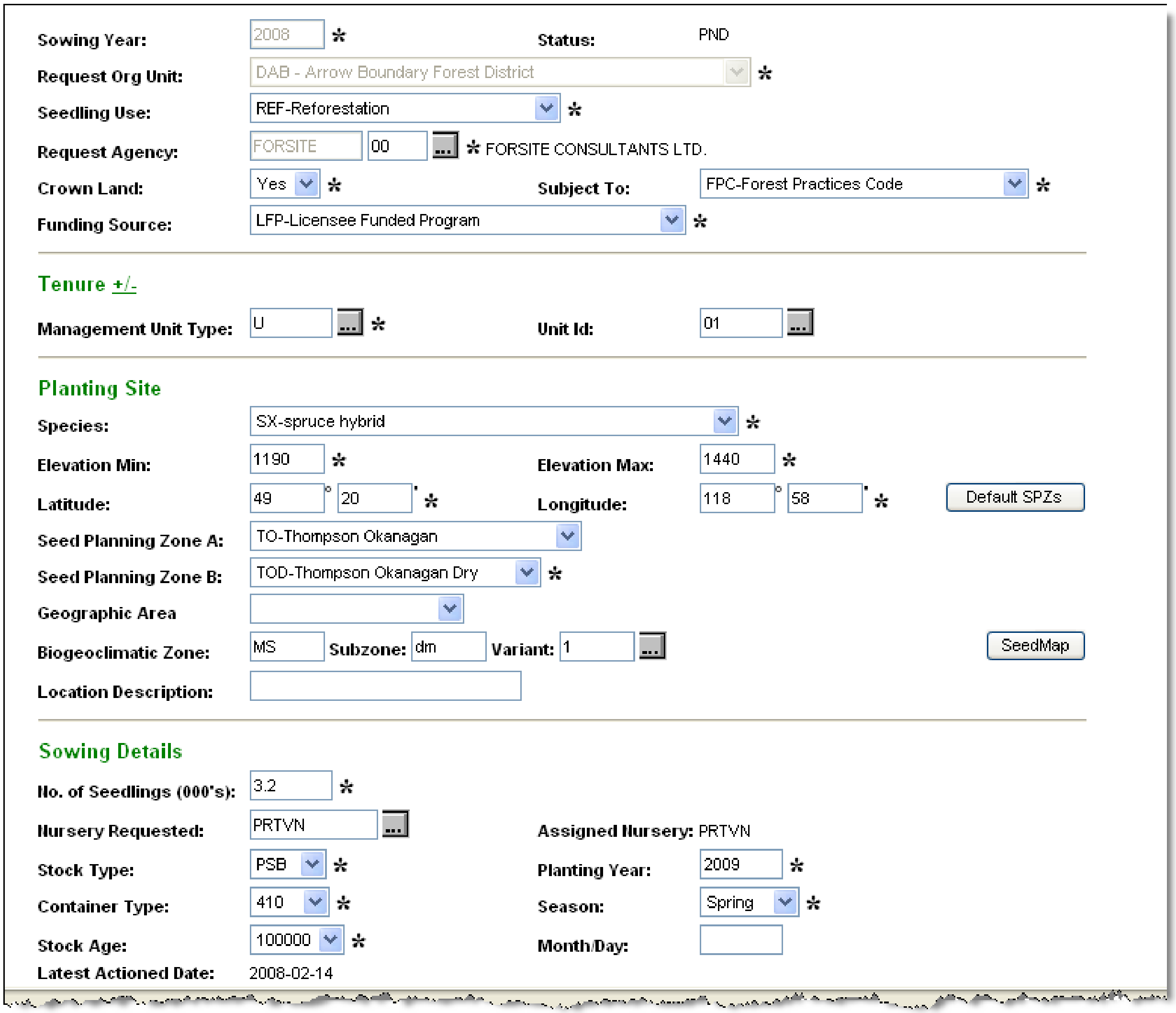
- Opening;
- Licence No. / Cutting Permit / Block;
- Timber Mark / Block; or,
- Management Unit Type (and ID for a TSA or TFL).

Topic 2—Adding a Seedling Request

4

Once you have completed the request information, you will need to select a Lot by proceeding to the Lot Selection Screen. If desired, use the **Additional Criteria** section to limit the list of potential lots listed on the Lot Selection Screen. If you have a specific lot in mind for the request, you can enter it in this Additional Criteria section.

The following screen print displays a sample Seedling Request.



Using the Lot Selection Form

Click the **Go to Lot Selection** button to select the appropriate lot for your request. It is mandatory that you complete the Lot Selection screen before you are able to successfully save your request.

The Lot Selection Form includes a list of lots which could be used to fill your request based on the current transfer guidelines. Usually it will be seedlots that are listed in this form, unless the stock types are intended for the production of rooted cuttings, in which case, vegetative lots will be listed.

The sort order of the lots will be similar to the sort order on Lot Search and Suitable Seedlot/Vegetative Lot Search. Lots are sorted as follows:

- Seedlots or Vegetative lots pre-selected on the Seedling Request Form.
- Class A and B+ lots, sorted by Genetic Worth (for Growth e.g. G+10, G+06), then germination percent for seedlots or rooting success for vegetative lots, then owner agency.
- Class B lots, sorted by germination percent for seedlots or rooting success for vegetative lots, then owner agency.

Scroll through the list and select the most appropriate lot owned by your agency (Reserve or Surplus) or from MOF Surplus or another agency's surplus allocation. If you are not sure which lot to select, always select the lots available at the top of the list first.

To select a lot:

1 Set the display radio buttons to meet your needs.

- Select either "Trees" or "Quantity (grams/cuttings)"
- Select either "Orchard" or "Lat/Long"

Click the **Refresh** button.

2 Scroll through the list to identify the lot you wish to select. Click the radio button that corresponds with the lot and owner combination you want to select.

Next to each row of data there are four buttons. Clicking each button navigates you to additional information as follows:

- 

 – Transfer Guide Exceptions Form

- SR – Sowing Rules Exceptions Form
- DT – Seedlot or Vegetative Lot Detail Form

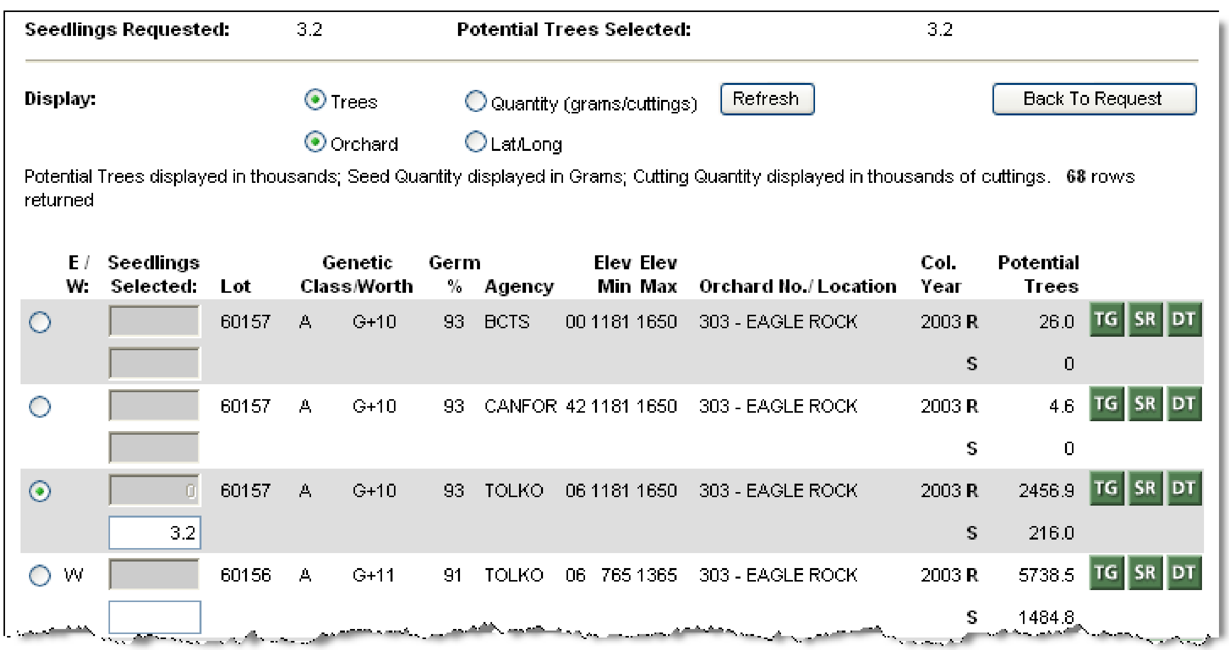
Note:

If you are selecting a lot that has a “W” (warning) or “E” (exception) to the left of the lot number, the lot does not meet the transfer guidelines for the Planting Site. Press the TG Button to review the problem. You will be navigated to the Transfer Guide Exceptions page where you can type in an override comment.

3 You do not need to enter a number in the **Seedlings Selected** field unless you are entering a gram amount that is different than the amount that SPAR would calculate based on the number of seedlings requested on the Seedling Request page.

Note:

If you are not able to select a lot for some reason, click the Back to Request button to return to the Seedling Request page and use the Save Incomplete button to change the status to Incomplete. You can then return to the request, at a later date, to change the status to Pending or Approved and select a lot. If you have selected a lot, and click the Save Incomplete button, the lot details will NOT be saved!



Seedlings Requested: 3.2 **Potential Trees Selected:** 3.2

Display: Trees / Quantity (grams/cuttings) / Refresh / Back To Request

Orchard / Lat/Long

Potential Trees displayed in thousands; Seed Quantity displayed in Grams; Cutting Quantity displayed in thousands of cuttings. **68** rows returned

E / W:	Seedlings Selected:	Lot	Genetic Class/Worth		Germ %	Agency	Elev Min	Elev Max	Orchard No./Location	Col. Year		Potential Trees			
		60157	A	G+10	93	BCTS 00	1181	1650	303 - EAGLE ROCK	2003	R	26.0	TG	SR	DT
											S	0			
		60157	A	G+10	93	CANFOR 42	1181	1650	303 - EAGLE ROCK	2003	R	4.6	TG	SR	DT
											S	0			
	0	60157	A	G+10	93	TOLKO 06	1181	1650	303 - EAGLE ROCK	2003	R	2456.9	TG	SR	DT
	3.2										S	216.0			
W		60156	A	G+11	91	TOLKO 06	765	1365	303 - EAGLE ROCK	2003	R	5738.5	TG	SR	DT
											S	1484.8			

4 Click the **Select Lot** button to save the request lot information. You are returned to the Seedling Request page.

Topic 2—Adding a Seedling Request

5 Save the Seedling Request and accompanying Selected Lot details by clicking the **Save Request** button. If you receive a warning, ensure you follow the directions provided. You will then be required to click the **Save Request** button a subsequent time. Approving the request is discussed later in this guide.

Note: If you attempt to use the **Save Request** button without first selecting a lot, SPAR will automatically navigate you to the **Lot Selection** page. You can then select a lot, return to the **Seedling Request** page, and click the **Save Request** button again.

About Overrides

The various types of overrides are explained later in this guide. However; upon saving the request, you may be presented with an override message. You will be required to either:

- type your comments in the box and press the **Continue** button to save the request; or,
- press the **Cancel Overrides** button to go back and modify the data in the request.

If the override is a "Transfer Guide Exception" then you will need to click the **TG** button next to the comment box to navigate to the **Transfer Guide Exception** page. You may enter a comment on this page and then use the **Back** button to return to the **Seedling Request** page to click the **Continue** button.

If you are updating a Seedling Request and wish to use the same override comment, you may simply click the **Continue** button when the override section is displayed.

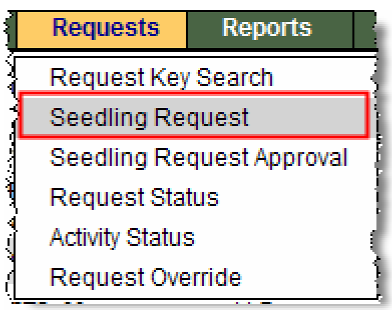
Adding a New Seedling Request Based on an Existing Request

Using the Seedling Request Form

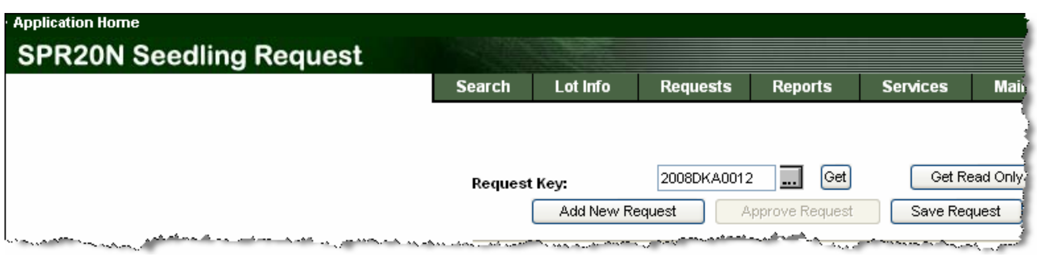
You can also use the Seedling Request Form to add a new request which has the same details as an existing request in SPAR. This is a handy feature which will save you time if you have two similar requests.

The following steps will guide you through the process of adding a request based on an existing request:

1. Click on the **Requests** tab and select **Seedling Request**.



2. Enter the **Request Key** for the original request that you wish to base the new request on and click the **Get** button. All data for that request is displayed.



3. Click on the **Add New Request** button. All data from the original request is displayed with the exception of the following:
   - Request Key
   - Additional Criteria
   - Selected Lot

4. You may now modify any of the existing data, add any details to the Additional Criteria section and select the lot for the request.

5. The **Request Key** will be generated once you save the request.

Updating a Request

The Seedling Request screen can also be used to modify information associated with an existing request. This includes general request information and lot selection information. To update an existing request:

1 Click on the **Requests** tab and select **Seedling Request**.

2 Enter the 11 character **Request Key** for the request you wish to update. If you do not know the Request Key, use the search function to search for the appropriate Request Key by clicking the search symbol ...

3 Click the **Get** button.

4 Edit information as required. You will not be able to update the Request Key, Sowing Year, Request Org Unit or the Request Agency. You may modify the Request Agency Location field.

Updating the Status of a Request

You can update the following status of a request if you have the proper authority:

- a Pending or Incomplete status to Approved
- an Approved status to Cancel
- an Incomplete or Pending status can be Deleted

When you update a request and confirm the update, and the status is not incomplete the committed quantity amounts (reserve and surplus) are updated. If the status is changed to Cancel the committed quantity amounts are set to zero and the see or cutting lot balances are adjusted accordingly,

5 You may modify Selected Lot details using that portion of the Seedling Request page or by navigating to the Lot Selection Form using the Go to Lot Selection button.

7 Once all the updates to the data have been made click the Save Request button to save the changes.

Practice Exercise B: Entering a Request

Exercise Instructions

Using the Request function, practice entering requests for your agency using the details provided. If you have any questions, highlight these to the instructor.

Request #1 (Record the Request ID here:___________________)

Field	Data Entry
Sowing Year	Current Year
Status	Pending – this will be automatically set by SPAR.
Request Org Unit	DCK
Seedling Use	Reforestation
Request Agency	TCH
Crown Land	Yes
Subject To	FRPA
Funding Source	BCT
Management Unit & ID	U 30
Tenure	B20
Species	Fdc
Elevation (min & max for planting site)	110 – 470 meters
Latitude	49 28
Longitude	122 12
Use the Default SPZs button to generate the Seed Planning Zones, Biogeoclimatic Zone, Subzone, and Variant	Default SPZs button
Geographic Area	Mainland
No. of Seedlings Required	5,600
Nursery Requested	Leave blank for ministry administered
Stock Type	PSB
Container Type	412A
Stock Age	100000
Planting Year and Season	2008 Fall

Use the Go To Lot Selection button to select a Lot for the request.	Any valid lot that is available.

Now, exit and re-enter the Seedling Request screen and modify by:

- Adding a Location Description
- Changing the Container Type
- Deleting half the amount from your original seedlot and selecting another seedlot.
- Remember to save your changes.

Request #2 (Record the Request ID here:____________________)

Field	Data Entry
Sowing Year	Current Year
Status	Pending – This will be automatically set by SPAR.
Request Org Unit	DKL
Seedling Use	Reforestation
Agency	Licensee
Crown Land	Yes
Subject To	FRPA
Funding Source	LFP
Management Unit & ID	U 13
Tenure	Optional
Species	SX
Elevation (min and max for planting site)	1120-1500 meters
Latitude	49 15
Longitude	117 25
Use the Default SPZs button to generate the Seed Planning Zones, Biogeoclimatic Zone, Subzone, and Variant	Default SPZs button
No. of Seedlings Required (000's)	15.6
Nursery Requested	PRT Harrop
Stock Type	PSB
Container Type	515A
Stock Age	1+0
Planting Year and Season	2009 Spring

Field	Data Entry
Use the Go To Lot Selection button to select a Lot for the request.	Any valid lot that is available.

Understanding Overrides

SPAR automatically applies specific business rules to seedling requests. Some circumstances may require an "override"of these business rules. This flexibility has been built into SPAR via the **Override** function. You should have an understanding of the various types of overrides. The first table below explains the overrides which a SPAR Administrator has authority to complete. The second table explains the overrides which a user may complete.

SPAR Administrator Override	Explanation
Past Action Date Override	When a Seedling Request is added or updated, the system calculates an Action Date. This is based on the Sowing Date and the time required for withdrawal and preparation of the lot. If a request is entered or updated after the Action Date, the message "Past the latest action date – override required" is displayed.
Sowing Rule Override	SPAR uses a Sowing Rule formula to calculate the grams required for a seedling request. This formula is based on information provided from SPAR clients and Seedlot information. The request agency and nursery may agree to change the sowing rules for a particular seedling request as an alternative to changing the grams. Contact the SPAR Administrator to request a Sowing Rule Override.
Sowing Date Override	SPAR uses a Latest Sowing Date table when a seedling request is entered, to determine the sowing date for a specific nursery, species and stock type/age. The nursery may request a change to the Sowing Date for a particular seedling request. Contact the SPAR Administrator to request a Sowing Date Override. Note: Sowing Dates can now be modified by the Assigned Nursery on the Request Specific Sowing Date Change page; therefore, it is seldom that this override is required.

User Override	Explanation
Transfer Guide Exception	The transfer guide exception highlights any problems that exist between the Seedlot or Vegetative Lot and the Planned Location or Planting Site.
Use of Class B Seed versus Class A Seed Override	When adding or updating a seedling request, if a Class B or B+ lot is selected when a Class A lot is available on the Lot Selection screen, the system will prompt the user to type in a comment. When prompted, type in a one-line rationale.
Fifteen Percent Rule Override	The grams of seed selected for a request can be modified from the amount calculated using the Ministry of Forests and Range sowing rules. If the difference between the amount calculated and the specific amount entered is greater than fifteen percent then this override is required. Nursery users may now make adjustments to grams for a specific seedling request by using the Nursery Grams Adjustment page; therefore, it is seldom that this override is required for a nursery.
Species Average Germination Override	A new seedlot may be selected on the Lot Selection screen before germination tests on the lot have been completed. Prior to the completion of germination tests, a seedlot may be registered with a 'species average germination'. The message **'Lot uses a species average germination - override required'** is displayed. Type in an override comment.
Seed Planning Zone A Override	When adding or updating a seedling request, if a SPZ A is selected which is not identical to the one generated by the Default SPZ's button then the system will prompt the user to type in a comment. When prompted, type in a one-line rationale.
Seed Planning Zone B Override	When adding or updating a seedling request, if a SPZ B is selected which is not identical to the one generated by the Default SPZ's button then the system will prompt the user to type in a comment. When prompted, type in a one-line rationale.
BEC Override	When adding or updating a seedling request, if a Biogeoclimatic Zone, subzone, and/or variant is selected which is not identical to the one generated by the Default SPZ's button then the system will prompt the user to type in a comment. When prompted, type in a one-line rationale.

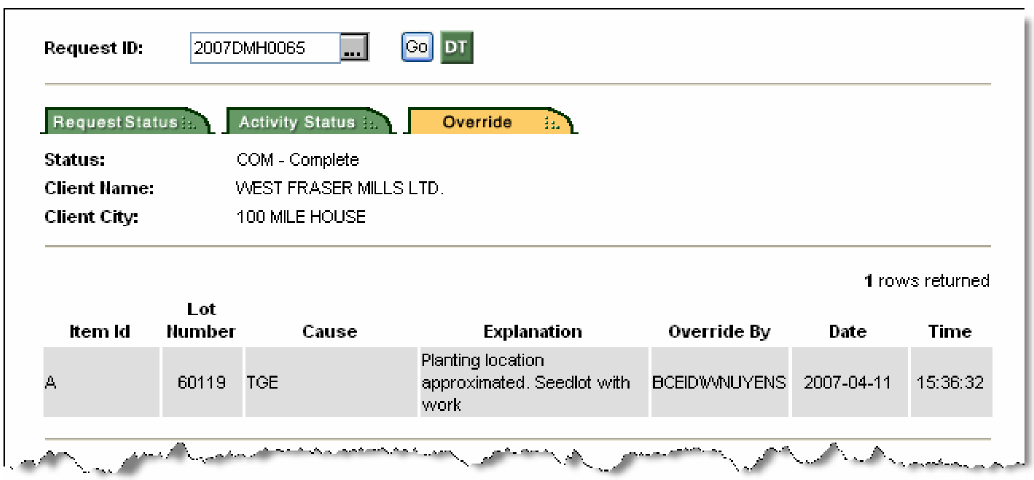
Examining Overrides

If you wish to examine overrides associated with a specific request, you can do so using the **Request Overrides** page. Follow these steps to navigate there.

1. Navigate to the **Seedling Request** page.

2. Click the **Request Status** button. You are navigated to the **Request Status** page.

3. Click the **Override** tab. You are navigated to the **Request Overrides** page where you can examine all overrides associated with this request.



You can also navigate to the **Request Overrides** page directly by selecting **Request Override** from the **Requests** menu.

Topic 3—Working with a Seedling Requests

Overview

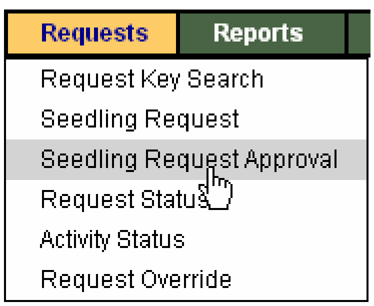
SPAR allows you to perform actions on Seedling Requests including approving, canceling and deleting the request. There are also SPAR pages which allow you to review the details of a specific request.

Approving a Request

Recall the Request Status Codes discussed at the start of this topic. As a request moves through the business cycle, its status is changed. A brand new request has a status of “Pending”. In order for the request to be actioned, it must first be “Approved”.

Follow these steps to approve a request.

1. Navigate to the **Requests** tab and select **Seedling Request Approval**.



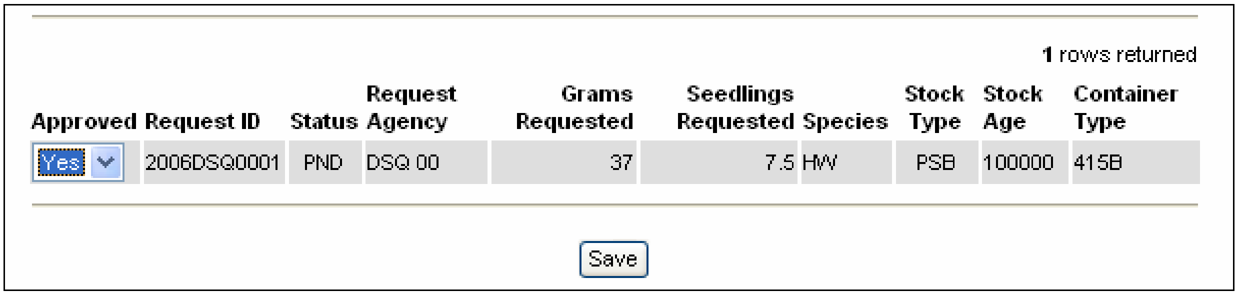
2. Enter data into the search fields. You will want to enter as many fields as possible to narrow your results.

3. Click the **Go** button.

4. Locate the row that includes the request you wish to approve in the bottom portion of the form.

5. Select **Yes** in the (approved) drop list associated with this row.

6. Click the **Save** button.



										1 rows returned
Approved	Request ID	Status	Request Agency	Grams Requested	Seedlings Requested	Species	Stock Type	Stock Age	Container Type
Yes	2006DSQ0001	PND	DSQ 00	37	7.5	HW	PSB	100000	415B

A Seedling Request can also be approved directly from the **Seedling Request** page by clicking the **Approve Request** button. If you click the **Approve Request** button and receive a warning then you must read the message and click the **Approve Request** button a subsequent time as per the message.

Practice Exercise C: Approving a Request

Exercise Instructions

Using the Request #1 that you entered in Exercise B, change the request status from "Pending" to "Approved". If you have any questions, highlight these to the instructor.

Canceling or Deleting a Request

The Seedling Request screen can be used to perform the following request status changes:

- Delete requests which have a status of "Pending" or "Incomplete" by using the **Delete** button.
- Cancel requests which have a status of "Approved" by using the **Cancel Request** button.
- You cannot change the status of a request to "Complete" or "Active". These are system generated.

Practice Exercise D: Canceling a Request

Exercise Instructions

Using the Request #1 that you "Approved" in Exercise C, change the request status from "Approved" to "Cancelled". If you have any questions, highlight these to the instructor.

Topic 3—Working with Seedling Requests

Viewing Request Information

There are three additional forms that you should be aware of when working with requests. These are all "display only" forms which are available from the Requests tab.

Request Status

This screen displays information pertaining to a seedling requests status including when it was created, updated and approved and by whom. This screen also displays key date information including:

- **Recommended Sowing Date –** the date the request will be sown at the nursery.
- **Recommended Action Date –** this date is derived from the Sowing Date. It is the date when the Tree Seed Centre will withdraw and begin processing of the seed. **A seedling request cannot be updated after this date.** Note: This field also displays on the **Seedling Request** page as the **Latest Sowing Date**.

Activity Status

This screen shows the seed processing activities. Typical activities for a seedling request would include seed withdrawal, seed preparation, and shipping of seed to the assigned nursery.

Override

This screen displays any override information that has been entered for a seedling request.

Practice Exercise E: Examining Request Details

Exercise Instructions

Navigate to the Request Status screen and search for a Seedling Request for your agency, which has a Sowing Year of last year. Examine the:

- Request Status
- Activity Status
- Overrides

If you have any questions, highlight these to the instructor.

Topic 4—Seedling Reports

Overview

There are numerous reports available in SPAR. These can be generated to meet various business needs. Note that during your work with SPAR you may have noticed a “print” icon. This icon allows you to print the current screen you are working on. This functionality is different than the report functionality discussed in this lesson.

Learning Objectives

In this lesson, you will learn:

- What reports are available; and,
- How to generate a report.

Reporting in SPAR

The following reports, available in SPAR, can help you to analyze request information.

Seedling Request Reports

- **Seedling Request Short Form Report -** this report is used to display Seedling Request information in an easy to read format.
- **Seedling Request Status Report -** this report can be used to view the current status of a request. The report includes some request information and detailed date information for activities related to seed withdrawal, processing, and shipping for each Seedling Request.
- **Seedling Request Confirmation Report -** this report is used to verify the entry of information on the Seedling Request forms. The report is formatted to enable checking of information with a Seedling Request Code Sheet.
- **SPAR Summary Report -** this report can be used to view quantities of requested seedlings.

Seed Use Reports

- **Seedlings Requested by Species & Genetic Class Report -** this report is useful for determining information on Class A, and B (this includes B and B+) seed ordered for a given sowing year.
- **Seedlings Requested by Species & SPZ Report -** this report is useful for determining information on seed ordered by species for each seed planning zone in a given sowing year.
- **Seedlings Requested by Region, District, Species and Genetic Class**

Report - this report is useful for determining information on seed ordered by each organizational unit (i.e. Region / District) for a given sowing year.

- **Seedlings Requested by Species & Improved Class Report -** this report is useful for determining information on Class A, B, and B+ seed ordered for a given sowing year. In addition, the percentage of improved seed is calculated. This is a high level report.

Genetic Gain Reports

- **Genetic Worth of Seedlings Requested by Species & SPZ Report -** this report calculates the weighted average genetic worth and number of seedlings requested for each species and seed planning zone. This report is used mainly by headquarters staff.

Extract Reports

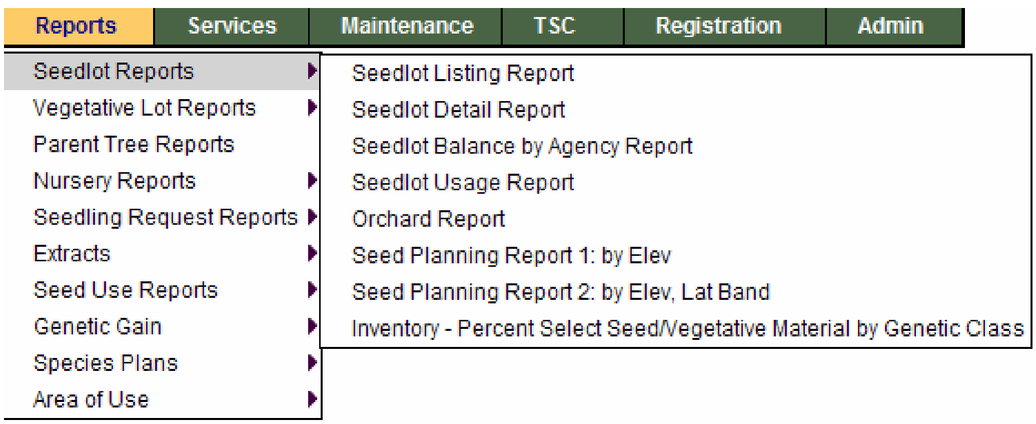
- **Seedling Request Extract Report -** this report can be used by anyone who wishes to know all details related to a seedling request. This report is useful if you need to import the data file into other applications (i.e. Plant Wizard).
- **Seedling Request Short Form Extract Report -** in general, this report contains all information most users should require about a seedling request. This report is useful if you need to import the data file into other applications (i.e. Plant Wizard).
- **Seedling Request Extract for Nurseries Submission -** this report is useful if you are a Nursery User.

For detailed help on a report, visit the **SPAR Online Help Guide**. This guide provides "field-by-field" information on all report parameters and outputs.

Generating a Report in SPAR

Finding a Report

All reports are available from the Report Tab in SPAR. When you navigate to this tab, you will notice that the reports are divided into sub-menus by the categories listed above. The screen print below shows a sample menu.

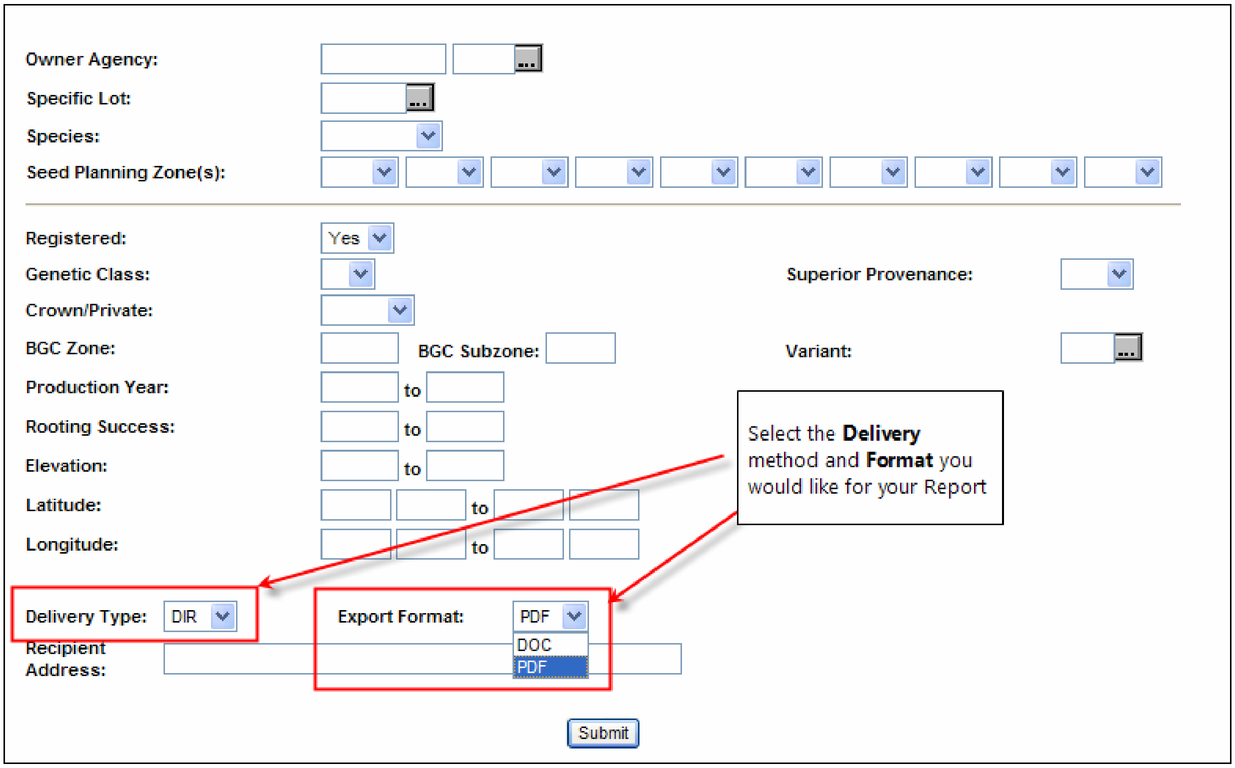


Report Parameters

The first step in generating a report is to complete the Report Parameter screen. This screen is very similar to a search screen in SPAR. Basically, you enter parameters which narrow your report results to be as specific as you require. Generally, the more parameters you enter, the more specific your report will be.

If a report parameter is mandatory it will be marked with an asterisk. You must complete the mandatory parameters otherwise SPAR will not allow you to generate the report.

A sample report parameter screen is shown on the next page.



Report Delivery & Formats

On the screen print above, notice that there is a field titled **"Delivery Type"**. This refers to how you would like the report to be delivered to your desktop. You have two options:

- **DIR**—this is an acronym for "direct". Selecting this option will display the report within a few seconds once you click the Submit button.
- **EML**—this is an acronym for "email". Selecting this option allows SPAR to generate the report and send it to you in an email. Note that the report arrives in your in-box moments after you click the Submit button.

You must type your email address into the **"Recipient Address"** field.

There is another field titled **"Export Format"**. This refers to the format of the report. You have two options:

- **PDF**—the report is formatted as PDF and will open in Adobe Acrobat Reader.
- **DOC**—the report is formatted as a Word Document and will open in Word.

Note for some reports there is an additional format option of XLS. If this is selected the report is formatted as an Excel Spreadsheet and will open in Excel

The **"Delivery Type"** and **"Export Format"** fields are common to most reports. Exceptions are noted below.

Exceptions:

The **Extract Reports** cannot be delivered directly to your desktop. The parameter screen for these reports only allows you to deliver the report to your email. These extract reports are intended for use in Microsoft Excel or other spreadsheet software, so they have a .csv (comma separated value) format.

The **Parent Tree Extract** report can also be generated as file type .XML. This is useful if the data is required for other web-based applications.

The **Species Plans—Table Summary Reports** and **Area of Use Reports** cannot be delivered via email. These reports do not provide you with a Delivery Type or Export Format. These reports will be delivered directly to your desktop as PDF files.

Report Results

The data you receive in a report corresponds to the parameters you enter. If you forget which parameters you have entered, refer to the summary of parameters on the first page of each report. Remember, the SPAR Online Help Guide includes field-by-field help for each display field of a report.

Exercise F: Generating Reports

Exercise Instructions

Navigate to the Reports tab and practice generating reports. Try to display a report as a PDF file and then try emailing a different report to yourself. If you have any questions, highlight these to the instructor.

Appendix A—Security Levels in SPAR

For Non-Ministry users:

Non-Ministry users must have a BCeID. SPAR access can then be obtained by going to the Electronic Forest Management Access Form for SPAR at:

http://www.for.gov.bc.ca/his/efm/access/spar.htm

The four security levels available to non-ministry users are:

Security Level	Authorized Actions
View & Report	View seedlot and vegetative lot information online and download or print reports.
Silviculture Supervisor	View seedlot and vegetative lot information online and download or print reports. View, enter, update, approve and report on seedling requests for their agency. Allocate lots owned by their agency as reserved or surplus.
Private Nursery	View seedlot and vegetative lot information online and download or print reports. Enter sowing dates for their nursery. View and report on seedling requests assigned to their nursery.
Orchard Manager	Register new seedlots collected in an orchard. Enter and update parent trees in an orchard.

For Ministry of Forests and Range staff:

Access can be obtained by submitting your IDIR User ID and the required security level to the **SPAR Administrator** via email (FORHTIP.SEEDHELP@gov.bc.ca).

The three security levels available to BC Timber Sales, District and Regional staff are:

Security Level	Authorized Actions
View & Report	View seedlot and vegetative lot information online and download or print reports.
Silviculture Staff	View seedlot and vegetative lot information online and download or print reports. View, enter, update, and report on seedling requests.
Silviculture Supervisor	View seedlot and vegetative lot information online and download or print reports. View, enter, update, approve and report on seedling requests. Register new seedlot collections