Tips on using the new NCDA&CS agronomic report search utility (PALS)

revised April 2016

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1. **Preferred Internet Browser**
   For optimal performance, use a relatively recent version of **Internet Explorer (IE)** as your browser. Depending on the version you have, you may need to select "Compatibility View" (see the IE Tools menu). Some aspects of the search feature work in recent versions of Mozilla Firefox or Google Chrome; PALS may not function correctly in Safari (browser for Apple computers).

2. **Report Search**
   PALS searches can locate soil and nematode reports generated during the current fiscal year (July 1–June 30) and in any of the three previous fiscal years.

   Search by Name.
   Enter your last name or business name (as you listed it on your sample information form) in the "Search Reports" box on the PALS homepage. As you enter letters of a name, a list will display of all names corresponding to your entry. Last name should be used for individuals. Scroll through the list and make your selection, then click the "Search" button. As a speed-enhancing feature, PALS sometimes displays only the first 50 or so names that meet the search criteria, especially for common last names such as "Smith" or "Roberts." In such cases, you may have to type additional information (e.g., instead of "Roberts," type "Roberts, M" or "Roberts, T") to get to the name you are looking for.
   Note: There may be duplicate entries for a person or business. This may occur if someone has had an address change or if variations in the name have appeared on sample information forms. In such cases, you may need to search several entries to find the reports you are seeking. Any client who notices multiple entries for him/herself and would like those accounts merged should follow the process described in section **6. Merge Multiple Client Listings**.

Search by Number.
This is a new feature, and we have tried to make it foolproof. As you may notice, as of July 2012, all report numbers have a similar format. Each "number" begins with a fiscal year designation, and after a dash, there is a letter code indicating the appropriate lab section followed by a six-digit number. For example, FY16-SL000043 indicates soil report #43 for fiscal year 2016.

Here are some examples that show how report-number searches work.

a) If you enter only numbers (for example, 247), then the utility will, by default, look for a soil report numbered "SL000247." Since no fiscal year was specified, the search utility may show you as many as four soil reports: FY16-SL000247, FY15-SL000247, FY14-SL000247 and FY13-SL000247. To select the right one, you must know which fiscal year you are looking for (current year or one of the three previous fiscal years). The other reports listed will most likely belong to other clients. A fiscal year runs from July 1 through June 30; reports listed for FY15 were analyzed during the time period of July 1, 2014, through June 30, 2015.

b) If you are not looking for a soil report, then be sure to enter the letter designation for the lab section along with the report number: for example, "N" for nematode, "P" for plant, "W" for waste, "S" for solution and "M" for soilless media. You do not have to enter all the leading zeros. An entry of 'N592' could locate the following nematode reports: FY16-N000592, FY15-N000592, FY14-N000592 and FY13-N000592.

3. **View Report**
Agronomic reports are available for viewing and/or saving as PDF files. Adobe Reader must be installed on your computer. When you click the "View Report" link, you have the option to view the report immediately, print it <u>or</u> save it to your computer for later use. The new homeowner report (PDF file) does not contain all of the soil test data found on standard agricultural soil reports; for example, Ca% is not listed. However, if homeowner report data are downloaded (CSV file), as discussed in below section **4. Download Data**, then all data can be seen.

Users are encouraged to save all their reports and/or data files to their own computer since reports are available on PALS for a limited period of time.

4. **Download Data**
Report data can be downloaded in CSV (comma-separated value) or spreadsheet format. When you select report(s) for download, you will be asked to open or save the file. To preserve desired formatting, always choose the "save" option first. After the file is saved to your computer, then you can open it with the software of your choice (e.g., Notepad, Wordpad, Excel).

CSV Format (*for use with N.C. Nutrient Management Software* (nutrients.soil.ncsu.edu/nmp/index.htm).
If you click the "Download Data" link located on the same line as the desired report, you will be *download*ing *data for* that *one report only*, and you will have two download options: "Use standard template" (default) or "Customize output." If you use the default, then all data will be downloaded in a form compatible with N.C. Nutrient Management Software. If you choose to

customize the download, then you will have the option of deselecting any items that you do not want to include. When prompted, "save" the file.

If you want to **download data from several reports into a single file**, the procedure is slightly different. When you choose multiple reports, all data are downloaded in standard format; you do not have the opportunity to select or deselect specific items. When you look at the list of your reports in PALS, you can check the "Select All" checkbox (upper right corner of the list), **or** you can check several individual reports by selecting the checkboxes associated with those particular reports. Once you have made your selections, choose the "Download CSV" option located at the top of the checkbox column. When prompted, "save" the file.

Excel Spreadsheet.

In general, follow the directions above. If you have Excel installed on your computer, then you can use it to open downloaded CSV files in spreadsheet format. Having opened a file in Excel, then you can save it as an Excel (XLS or XLSX) file, if you wish.

5. **Change Crop Code (special new feature for Soil Reports only)**
   This feature is **primarily for farmers and commercial growers** who change their crop selection plans after receiving soil report recommendations for another crop. It enables them to pull up the report for the sample in question, enter a new crop code, and receive revised lime and fertilizer recommendations suitable for the new selection.

   To use this option, find "Utilities" in the navigation bar at the top of any PALS page. Place your cursor over "Utilities" and click "Change Crops on My Report" from the dropdown list. Select the desired fiscal year. Enter the appropriate soil report number. Click the "Search" button.

   If the report has multiple samples, click on the one that you want to change. It will be highlighted. Then, click on the arrow in the "Select First Crop" box to display a list of all possible crops. Select the one you have decided to grow. If applicable to your situation, specify a crop in the "Select Second Crop" box as well. Then click the "Change Selected Sample" button. You will be given revised lime and fertilizer recommendations, but you will not be able to print a revised report. Your original report will remain in our system with the original crop specifications. You can, however, download the revised recommendations in Excel spreadsheet form.

6. **Merge Multiple Client Listings**
   If you discover that you have reports in several different accounts in PALS based on slight variations in name or address, you can request that they be merged into one account. Request the merger via the "Contact" link on PALS. Please specify in detail which accounts need to be merged. For example, please merge reports for James Taylor (402 W. Washington St., Raleigh, NC 27615) into those for James R. Taylor (402 W. Washington St., Raleigh, NC 27615). Our staff must know exactly how your name, address, etc., should be listed in the merged account.

7. **Login & Password**
   Logging in with a password is not necessary for routine report searches. It is required if you want to fill out and submit a soil or nematode sample information form online and made a pre-payment with a credit card. You also must login in if you want to use the PayNow feature to pay for a report(s) that is listed as "payment pending."

   To create an account and set up a password, this is what you need to do.
   1. Click on the "Log in" button.
   2. On the page that appears, select the appropriate radio button ["Client" or "Advisor"], then look at the bottom of the page and click on "Create New Login."
   3. Type your last name in the "User Name" box, and then select your name from the list that appears.
   4. Type a password in the "Password" box. Type it again in the "Confirm Password" box.
   5. Then click the "Create Login" button.

   If you forget your password, just go to the Login page, click the "Forgot Your Password?" link and follow the instructions.

8. **Submit Soil or Nematode Sample Information (& Pre-pay with Credit Card, if applicable)**
   The procedure for online sample submission and payment is this: 1) enter sample information online, 2) pay online, 3) print a copy of the sample information form, and 4) send your samples along with the form (which is labeled with your submission number) to the lab.

9. **Bar-code Shipping Labels for Sample Tracking**
   This option is still available from the Agronomic Division home page www.ncagr.gov/agronomi. We plan to integrate this function into PALS in the near future.

10. **Notes for Advisors**
    To see all your client reports, type your last name or business name into the "Quick Report Search" box. Click the "Search" button. Choose your name from the list. If a list of reports displays, they should be your personal reports. To see a list of all the reports for which you are the advisor, click the "Advisor" tab.