

Curator Tool Installation Guide



Revision Date

January 28, 2014

This guide contains an overview and step-by-step directions for installing the GRIN-Global Curator Tool.

In the National Plant Germplasm System (NPGS), the user's PC will be networked to the main GRIN-Global database server at a remote location (Beltsville). Before implementation into production (when GRIN-Global replaces GRIN), training participants will access test data from the **Training** server which is located in Beltsville, Maryland. This data has been copied from the production system (GRIN) and is updated on a regular basis.

Comments/Suggestions:

U.S. NPGS users should contact feedback@ars-grin.gov with any suggestions or questions related to this document.

Caveats

The GRIN-Global system was designed to run primarily on a Windows operating system. (Refer to the [Requirements](#) section.)

Users have reported issues with installing the CT when ArcGIS has been previously installed. (Each system uses Microsoft's SQL Server Express database to manage data on the user's PC. Both applications can run on the same PC – the typical issue occurs when ArcGIS has been installed and has an older version of SQL Server. If you need assistance with this, contact feedback@ars-grin.gov.)

Changes in this Document

– **January 28, 2013**

- Changed the server reference on page 8 (again)

– **August 1, 2013**

- Changed the distribution server reference on page 8 to the training server

– **July 16, 2013**

- Changed the screen illustrating the training source server for the Curator Tool

– **July 11, 2013**

- Changed the source server for the GRIN-Global Updater to the **Distribution** GG server

– **July 3, 2013**

- Updated name of the server to be used when updating the latest Curator Tool; reconfigured the order of the document

– **April 15, 2013**

- Minor editing changes

– **October 25, 2012**

- Removed any references to the SQL Server Management Studio (since most users will not have that installed on their PC)

– **March 9, 2012**

- Modified the step-by-step directions for adding a User to the Local SQL Server Database Administrator's Group

– **February 17, 2012**

- initial printing

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Components of GRIN-Global

In NPGS, what is Needed to Access GRIN-Global?

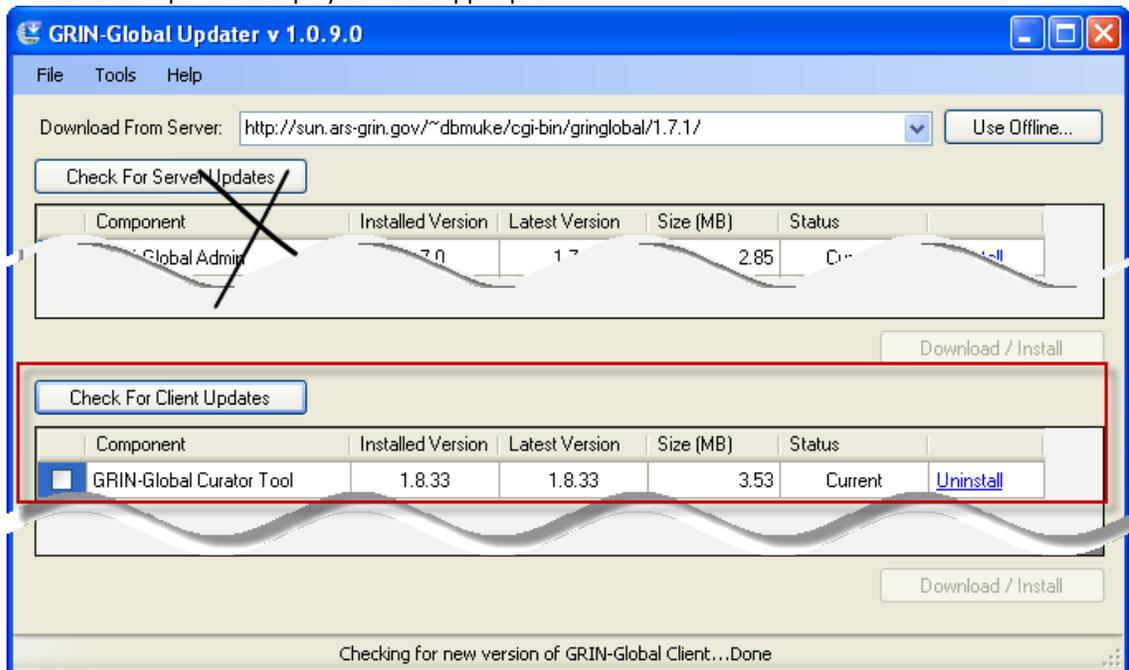
In NPGS, there are three main GRIN-Global components that will be used:

- **Public Website (PW)** – you access the PW via a browser window, typically Internet Explorer, Chrome, or Firefox. Since no additional software is installed, just point to the following URL in a browser window: <http://npgsweb.ars-grin.gov/gringlobal/search.aspx?> -- bookmark it!
- **Curator Tool (CT)** – the GRIN-Global **Curator Tool** is an application and must be installed on your PC in order to connect to the remote NPGS server in Beltsville. This document includes detailed instructions for installing the Curator Tool on a PC and directions for connecting to the NPGS server.
- **Search Tool (ST)** – the Search Tool is automatically installed when the Curator Tool is installed. The ST can run as a stand-alone application, but generally it is launched from within the CT. (There is a **Search** button in the CT.) It too will be pointed to the remote (Beltsville) server

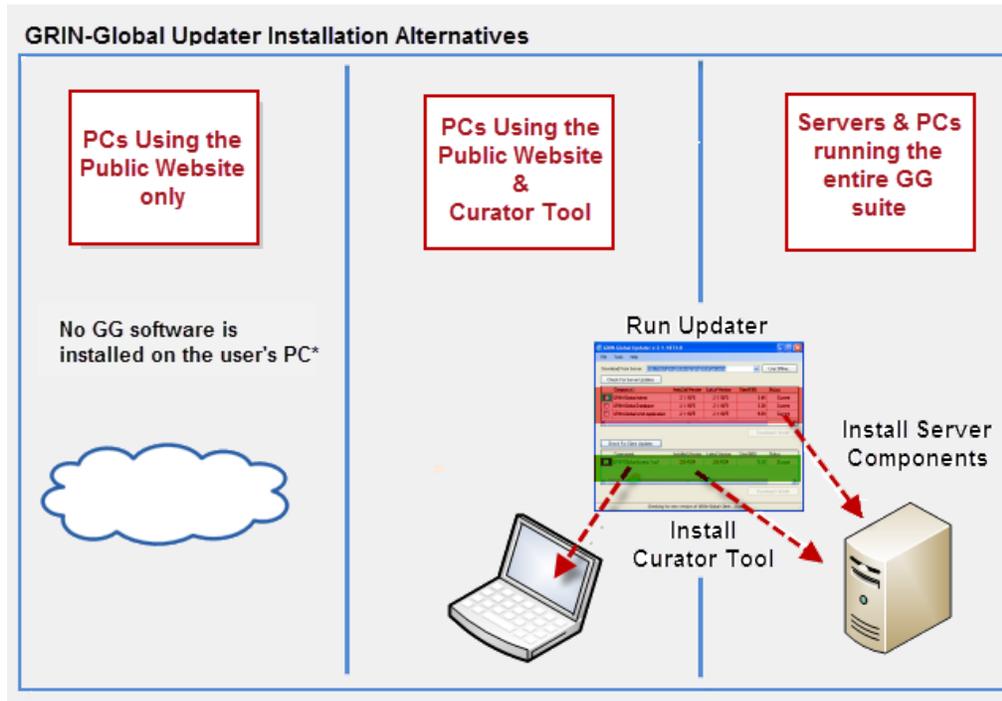


*Not all GRIN-Global users need to install all of GRIN-Global's components. The next section will explain using the GRIN-Global **Updater** program to install the rest of the GG programs. The **Updater** window displays two sections: one for server and one for client updates. *At NPGS, we are only loading the Curator Tool on user's PCs and are not installing any of the server components.**

There are two panels in the **Updater** window. In some smaller genebanks, the user's PC may also function as a server, but in NPGS, since you will be accessing a networked server, there is no need to install any of the server components displayed in the upper panel.



NPGS users will be setup as shown below with the middle alternative.



The GG **Updater** program is first downloaded onto the user's PC. After downloading the **Updater**, you run it and it will prompt you to install various GG components – however, in NPGS, only the Curator Tool, the client application, needs to be selected. Only the DBMU in Beltsville will install the server components. (They will install everything on their server, so they also will install the CT on the server PC, as shown in the diagram.)

Installing GRIN-Global

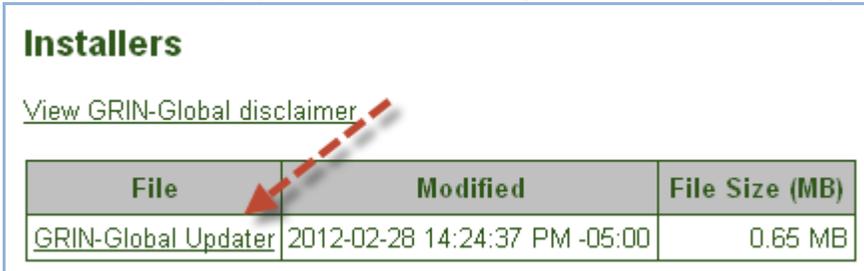
In order to use the GRIN-Global Curator Tool, you must first install the GRIN-Global **Updater** program. If you are only intending to use the Public Website, you do not need to install any program (Refer to the [Public Website](#) section.) This **Updater** program in turn will then be used to install the remaining GRIN-Global client components, the Curator Tool and the Search Tool.

Installing the Updater Program

The following installation instructions provide step-by-step instructions; however, if your site/organization has a firewall, read the [Installing with Firewalls](#) section on page 25 before following these directions.

Source for the Updater Program

1. In your browser, use <http://distribution.grin-global.org/gringlobal/downloads/default.aspx>
2. Scroll until you display the **Installers** heading; click the **GRIN-Global Updater** link in the table:



Installers

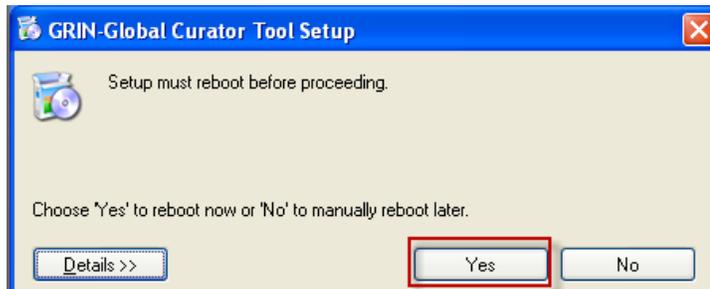
[View GRIN-Global disclaimer](#)

File	Modified	File Size (MB)
GRIN-Global Updater	2012-02-28 14:24:37 PM -05:00	0.65 MB

[Complete step-by-step directions.](#)



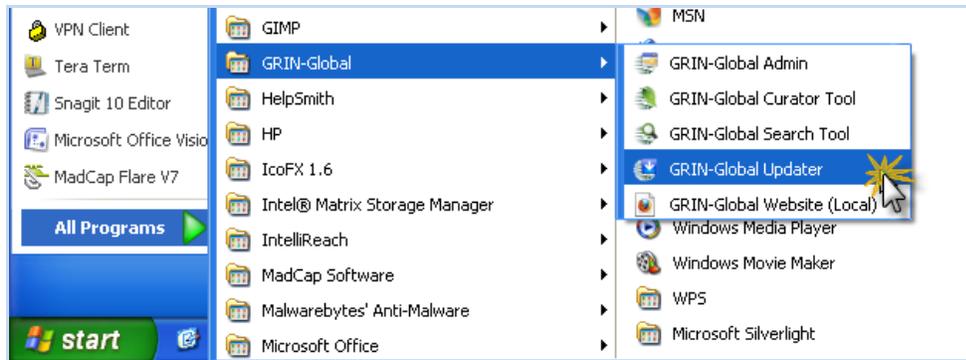
During the complete installation process, several prerequisite programs will be installed on your PC. At some point you may be required to reboot. (We use the word “may” here because Microsoft continually changes the installation procedures of these products.)



After rebooting, the Microsoft application will finish installing, but the GRIN-Global **Updater** program will not automatically launch and continue. Therefore, when a reboot is involved, you will need to manually launch **Updater** which should be on your Windows menu. (You should not need to start from scratch.)

To Launch the Updater (after it has been installed)

1. Click the Windows **Start button**
2. Select **GRIN-Global**
3. Select **GRIN-Global Updater**



General Requirements when Installing GRIN-Global

General Requirements

- The user installing GRIN-Global must have *administrator rights to the PC*
Note: Complete directions for handling the situation when a user does not have admin rights are detailed on page 25
- The PC needs to have an Internet browser installed (such as Windows Internet Explorer, Mozilla Firefox, or Google Chrome); the PC's browser must be Active-X enabled

Hardware requirements

- 20 GB free hard drive space
- the suggested memory for running the Operating System + 2 GB RAM for running GRIN-Global

Operating Systems

- Windows XP Pro Service Pack 3
- Windows Vista (Ultimate; 32- or 64- bit)
- Windows 7 (Home Premium; Ultimate; 32- or 64- bit)



GRIN-Global cannot run on Windows XP Home or Windows NT operating systems, primarily because these operating systems do not support the .NET Framework 3.5.

For security reasons, users are frequently set up by their organization to not have full Windows Administrator rights to their PCs. When that is the case, the organization's PC Administrator, usually someone from the Information Technology or Security group, will need to install the Curator Tool.

Another installation consideration is whether there is a firewall set up. If your organization has a firewall, read the [Installing with Firewalls](#) section before continuing with these directions.

Step-by-Step Updater Installation Directions

Step 1

To download and install the Updater program, using your browser, such as Microsoft's Internet Explorer or Mozilla Firefox, follow this link: <http://distribution.grin-global.org/gringlobal/downloads/default.aspx>

In the **Installers** section, under **File**, click the link **GRIN-Global Updater**:

Installers

[View GRIN-Global disclaimer](#)

File	Modified	File Size (MB)
GRIN-Global Updater	2012-02-28 14:24:37 PM -05:00	0.65 MB

Depending on which browser you are using, your next step will vary slightly. Since most browsers emulate either Microsoft's Internet Explorer or the Mozilla Firefox browser, steps 2A and 2B were written to accommodate the differences.

- Proceed with [step 2A](#) if you are using Internet Explorer
- Skip to [step 2B](#) if you are using Firefox or a similar browser

Step 2A: (Using Microsoft's Internet Explorer)

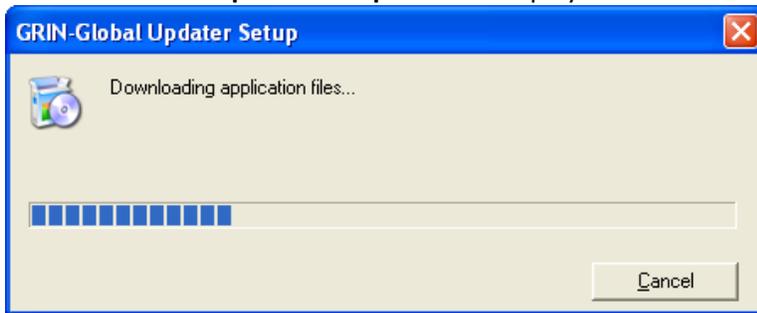
The **File Download** window displays. Unless you want to postpone initiating setup, click on the **Run** button to proceed. (The **From** name will differ.)



An Internet Explorer Security Warning window displays; click **Run**.



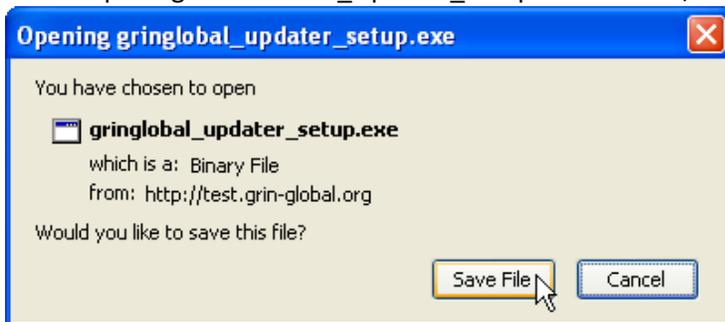
The **GRIN-Global Updater Setup** window displays:



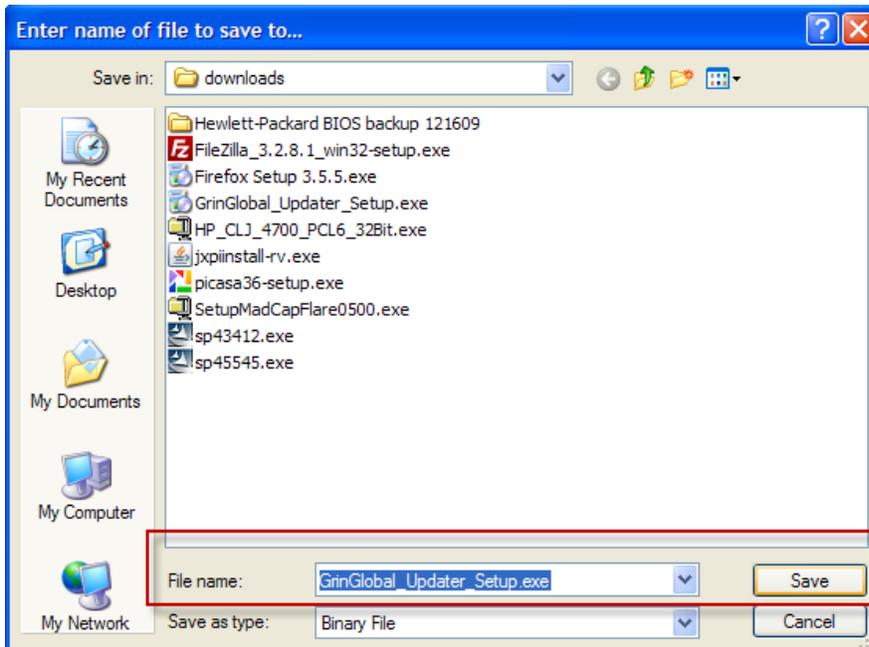
Proceed to [Step 3](#).

Step 2B: (Using Mozilla Firefox)

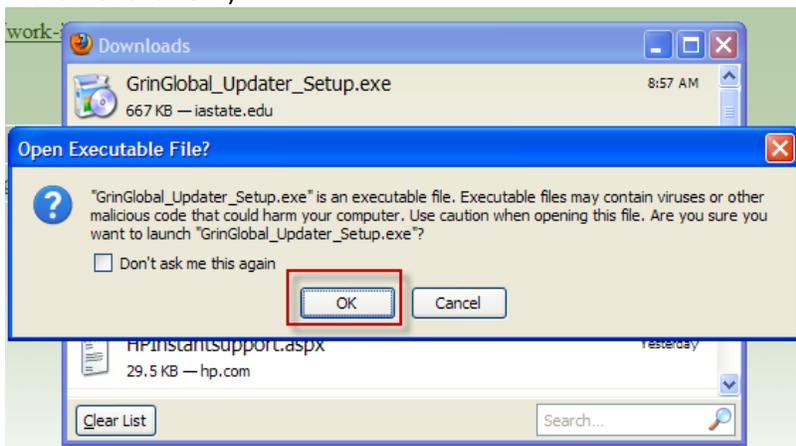
At the Opening GRIN-Global_Updater_Setup.exe window, click the **Save File** button.



Save the file.



Launch the file. (Double-click its filename if in Windows Explorer, or if in your browser, click on the filename. Click **OK**.)



Click the **Run** button.



Step 3

At the **Setup - Security Warning** window, click the **Run** button.



Organizational Firewalls

If the following window displays instead of the window above, your organization most likely has a firewall preventing the **GrinGlobal_Updater_Setup.msi** ("setup.msi") file from executing properly:



When working with firewalls, follow the directions *Installing with Firewalls* section.

Step 4

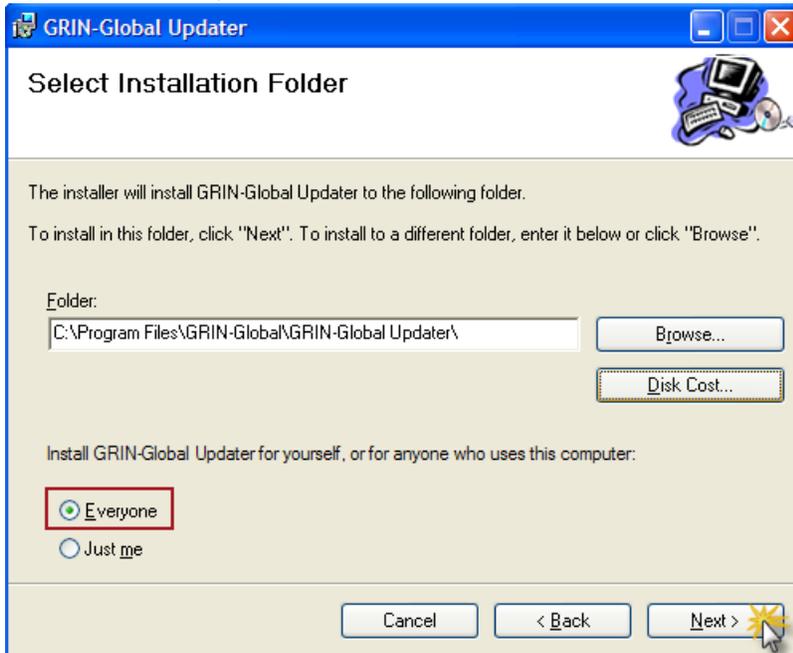
For several succeeding **Setup Wizard** windows, click the **Next** button to continue.



Step 5

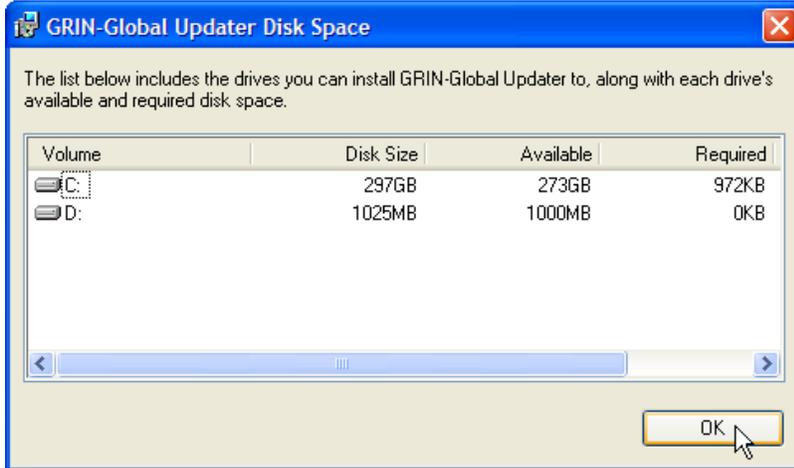
On the **Select Installation Folder** window you can change the default folder location and also indicate who will have access to the GRIN-Global programs (all users (**Everyone**) or the current user (**Just me**)). Generally, you should accept the defaults. If a different location is desired, click **Browse**. (Another option is the **Disk Cost** button which can be used to determine if you have enough space on your drive. The complete installation requires less than 1 GB.)

Click **Next** to accept the defaults and continue.



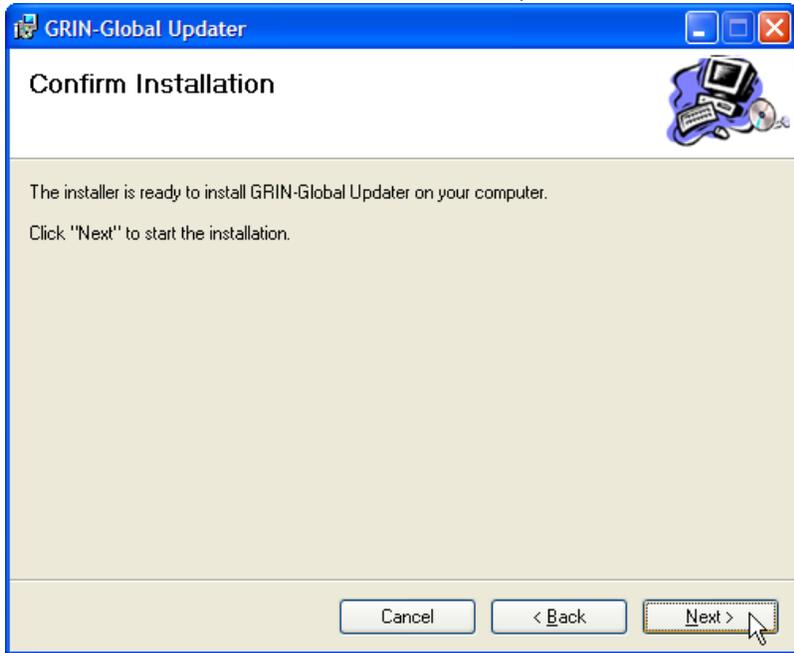
(Optional Step When the Disk Cost Button is Selected)

The **Updater Disk Space** window, indicating available and required space, is displayed when the **Disk Cost** button on the **Select Installation Folder** window is clicked. Click **OK** to continue.



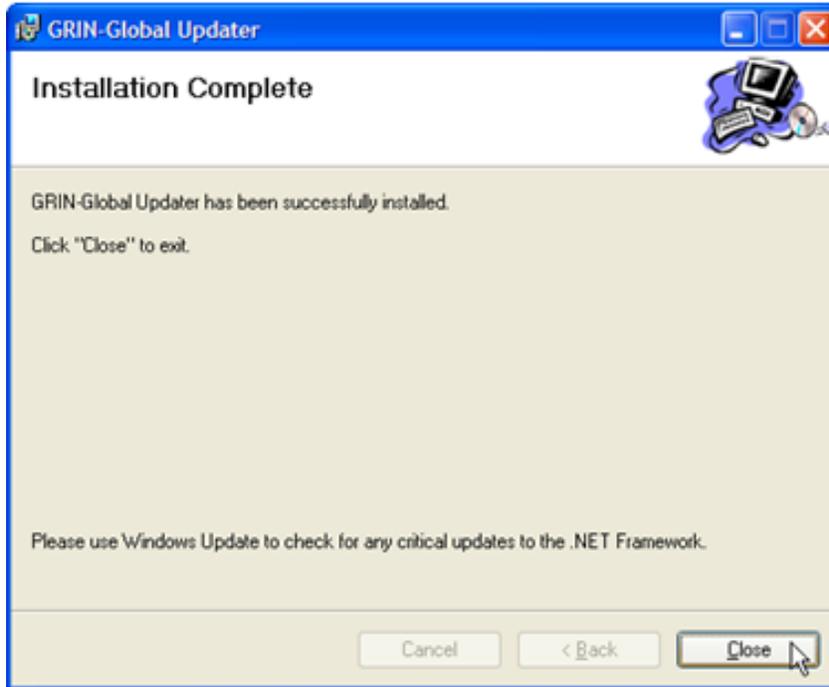
Step 6

Click **Next** to continue with the Installation process.



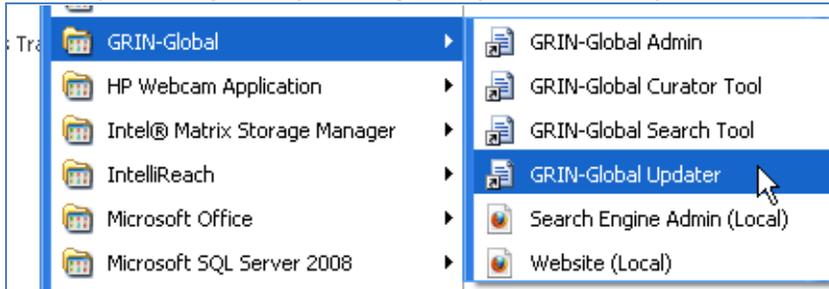
Step 7

Click **Close**. Note: If you need to pause, this is a good stopping point.



Step 8

[Note: if you interrupt the installation process, you can return to this point via the Windows **Programs** menu by selecting **Start | All Programs | GRIN-Global | GRIN-Global Updater.**]

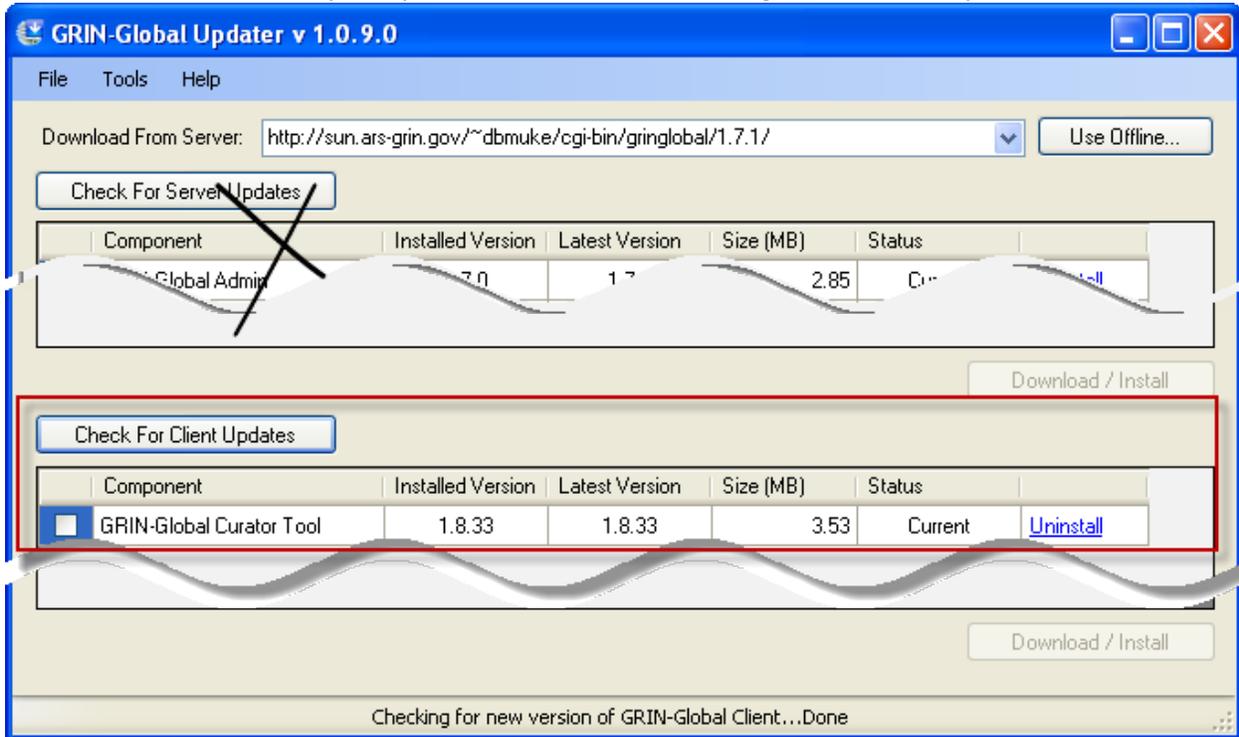


Curator Tool: Installing (or Updating)

General Note Regarding the GRIN-Global Updater Window

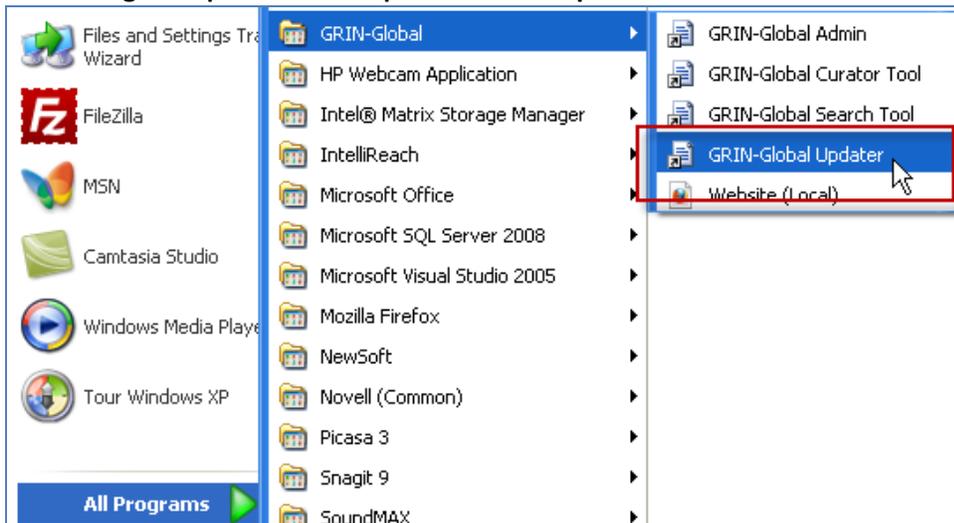
The **Updater** window is used to check for both server and client updates. At NPGS, we are only loading the **Curator Tool** on users PCs *and are not installing any of the server components*. Therefore only the *bottom section in the following window applies to NPGS users*. (However, when you install the Curator

Tool on a PC, additional CT prerequisites are also installed during the installation process.)



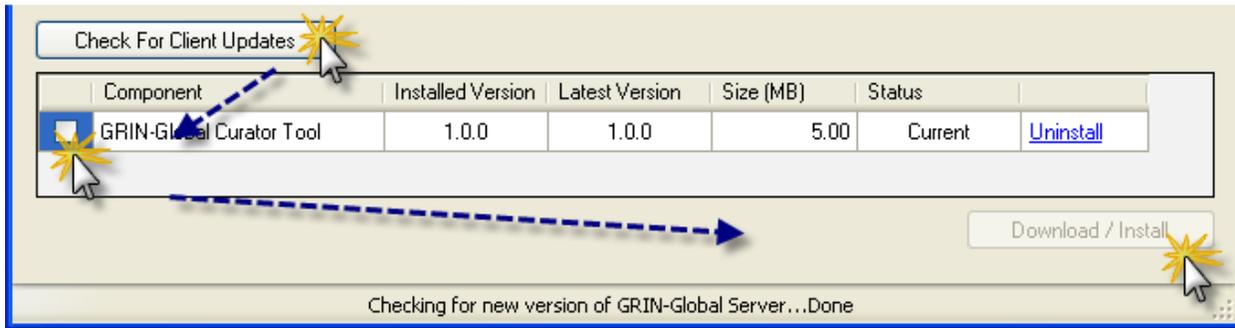
Invoking the GRIN-Global Updater Program

Use the GRIN-Global Updater program to install the **Curator Tool**. Click the Windows **Start** button. Click on **All Programs | GRIN-Global | GRIN-Global Updater** .



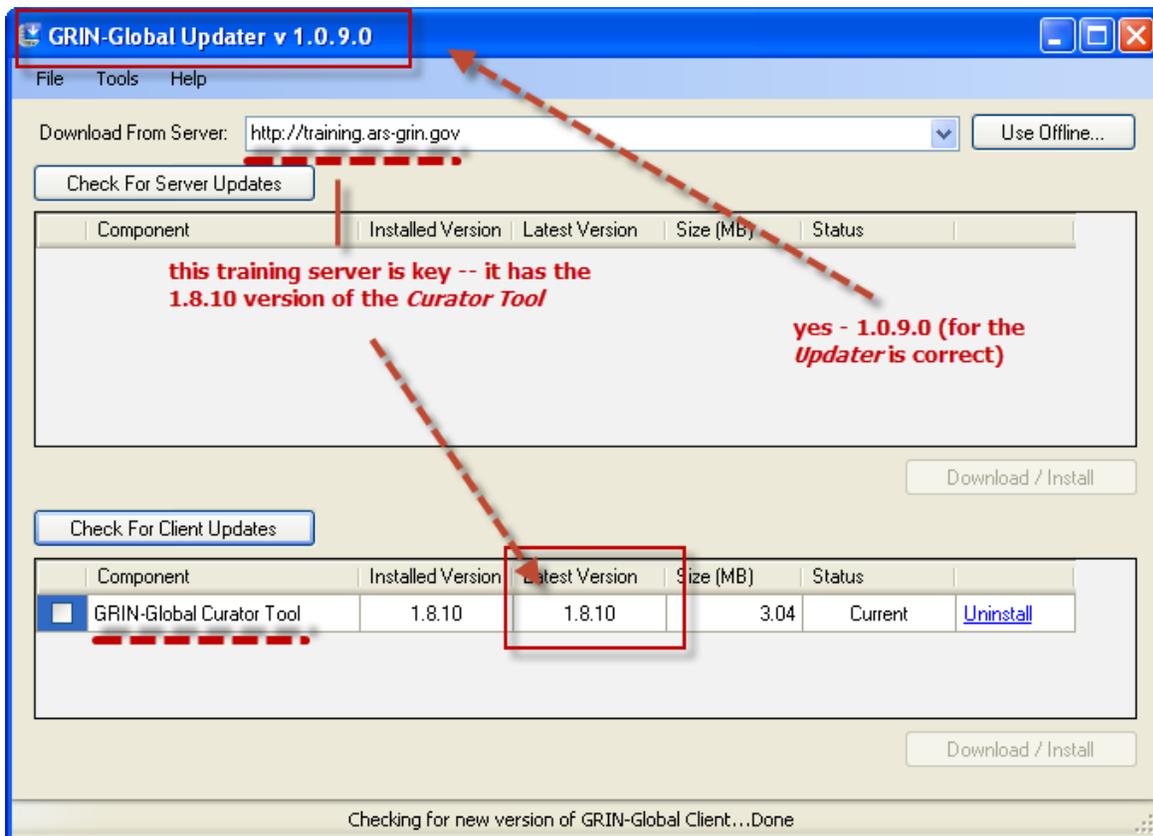
Click the **Check for Client Updates** button. (In the following example, the GRIN-Global Curator Tool component has a “Current” status; hence the **Download/Install** button is not active, since there is no need to download.) However, when installing for the first time, click the **GRIN-Global Curator Tool**

checkbox and then click the **Download / Install** button.

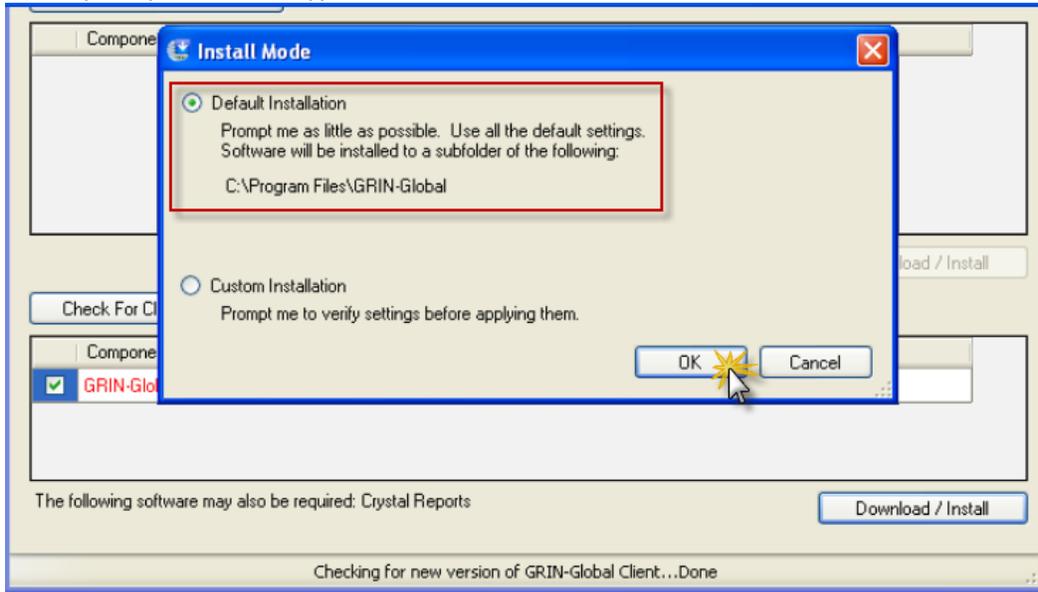


Also, whenever the GRIN-Global Curator Tool component has an "Outdated" status, click the bottom **Download/Install** button; the **Client Installer** program will proceed to download. This should be done when new versions of the Curator Tool are available.

NPGS: July 2013: Use <http://training.ars-grin.gov> for the server address (see illustration on next page)



When prompted for the type of installation, select the **Default Installation**:

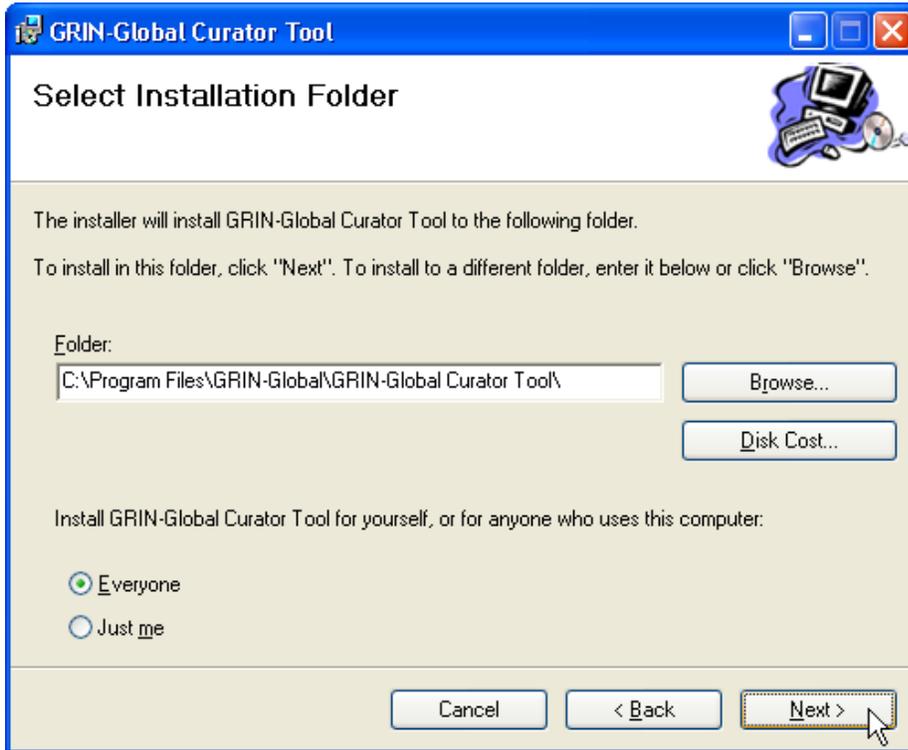


During the Curator Tool installation process, certain prerequisites are expected. If they are not installed, the installation will automatically install these also. If this is a re-installation of the Curator Tool, or if these prerequisites were already installed on the PC, they will not be reinstalled. For the most part, simply respond to the prompts to continue. (For more details on the prerequisites, refer to [prerequisites](#) on page 20.)

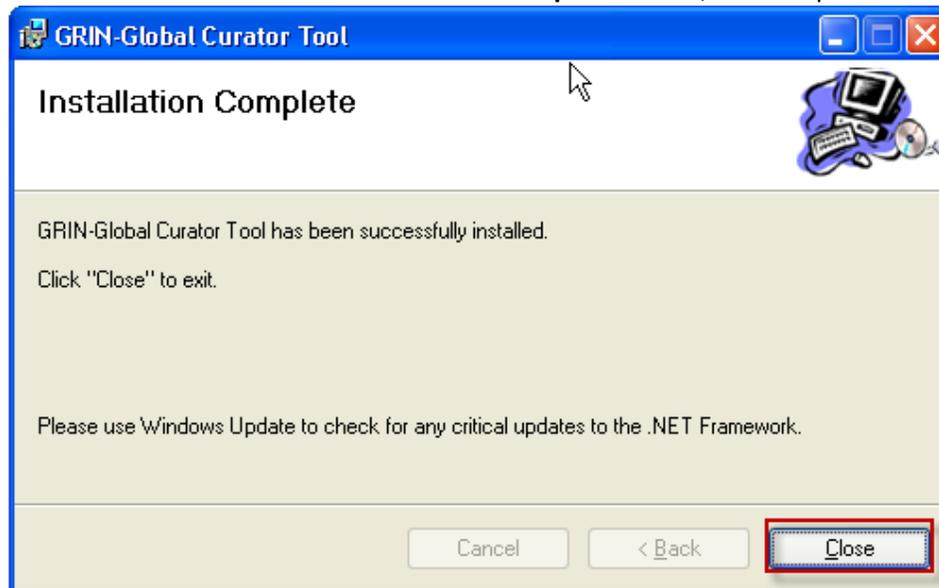
Curator Tool Installation Wizard

After the Curator Tool download completes, follow through with the installation wizard; you will be prompted by a series of screens to continue with the installation. Generally, click **Next** at each window to continue.

On the **Select Installation Folder** screen, keep the default folder as listed (recommended) or indicate a different location to store the Curator Tool.

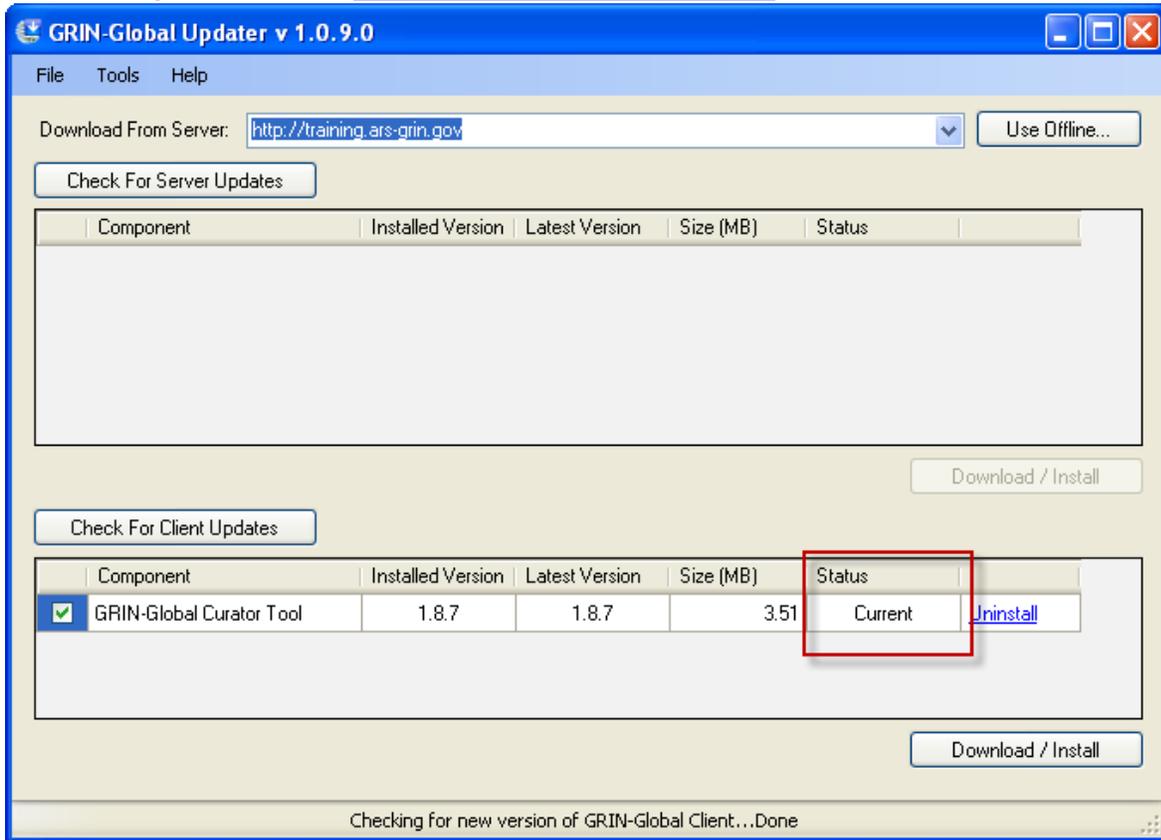


Click the **Close** button on the **Installation Complete** screen; this completes a successful installation.



The Updater window will display the status for the Curator Tool as “Current.”

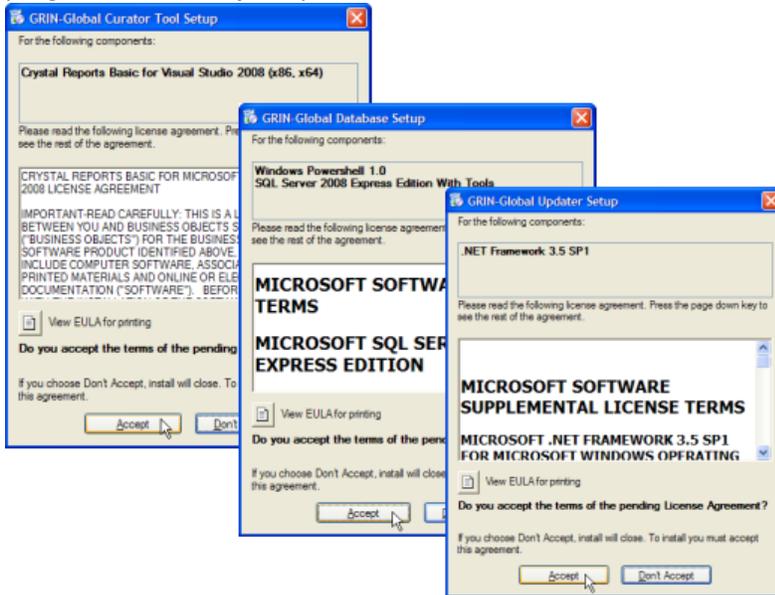
NPGS: July 2013: Use <http://training.ars-grin.gov> for the server address



Installing the Prerequisites

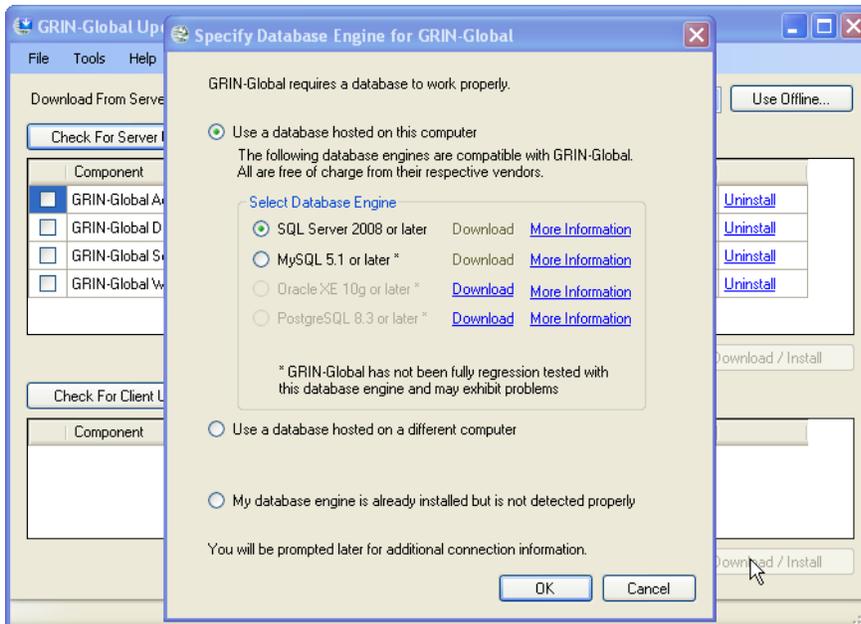
General Requirements – Installing the Prerequisite Applications

Whenever an acceptance window displays for a Microsoft or SAP's Crystal Reports prerequisite program, click **Accept** to proceed with the installation.

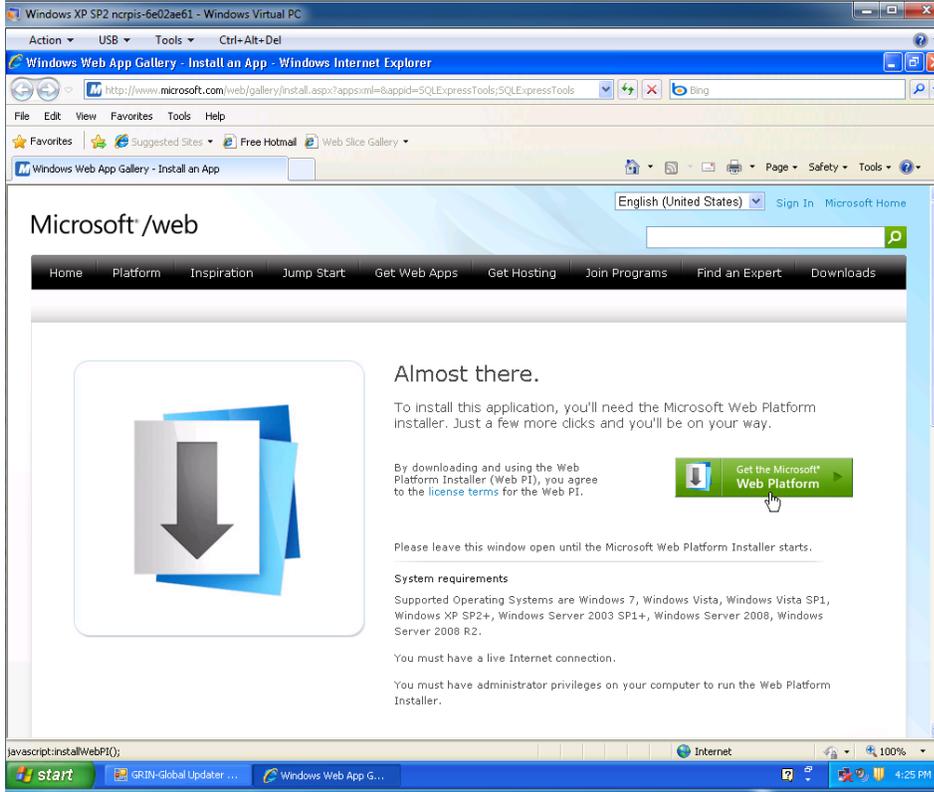


Even though the NPGS curation data is stored on a remote server in Beltsville, a database engine, Microsoft SQL Server Express, is loaded onto the user's PC during the Curator Tool installation process. Loaded on the user's PC is a local copy of Curator Tool "lookup tables." Lookup tables will be explained elsewhere. Let it suffice for now that all Curator Tool users have a set of lookup tables installed on their PC and a copy of Microsoft SQL Server Express.

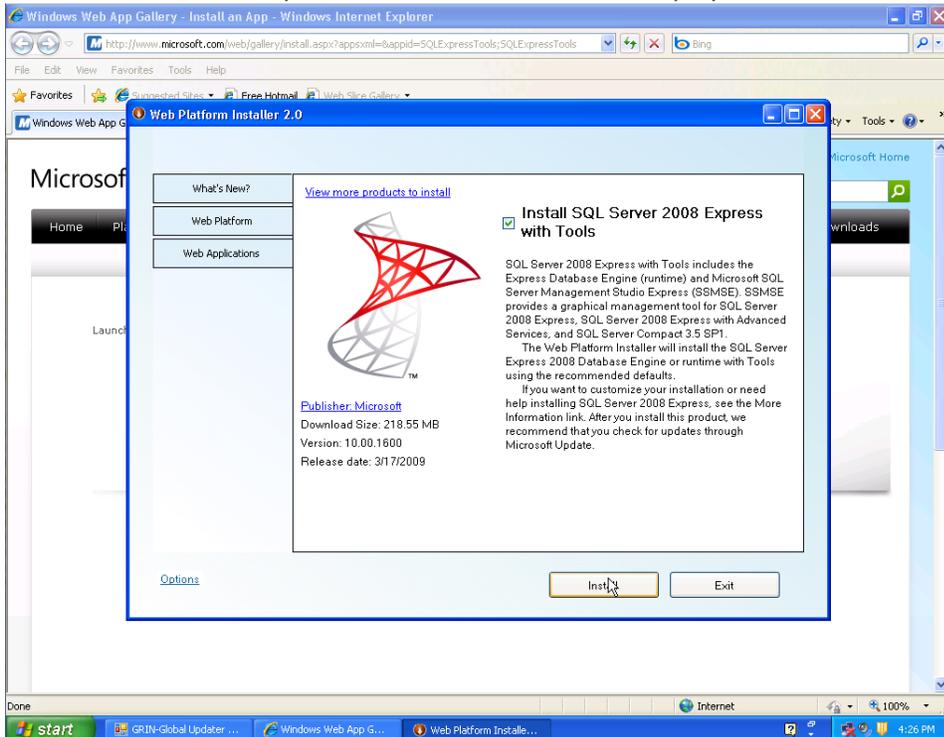
The screens that follow reflect the installation of Microsoft SQL Server Express.



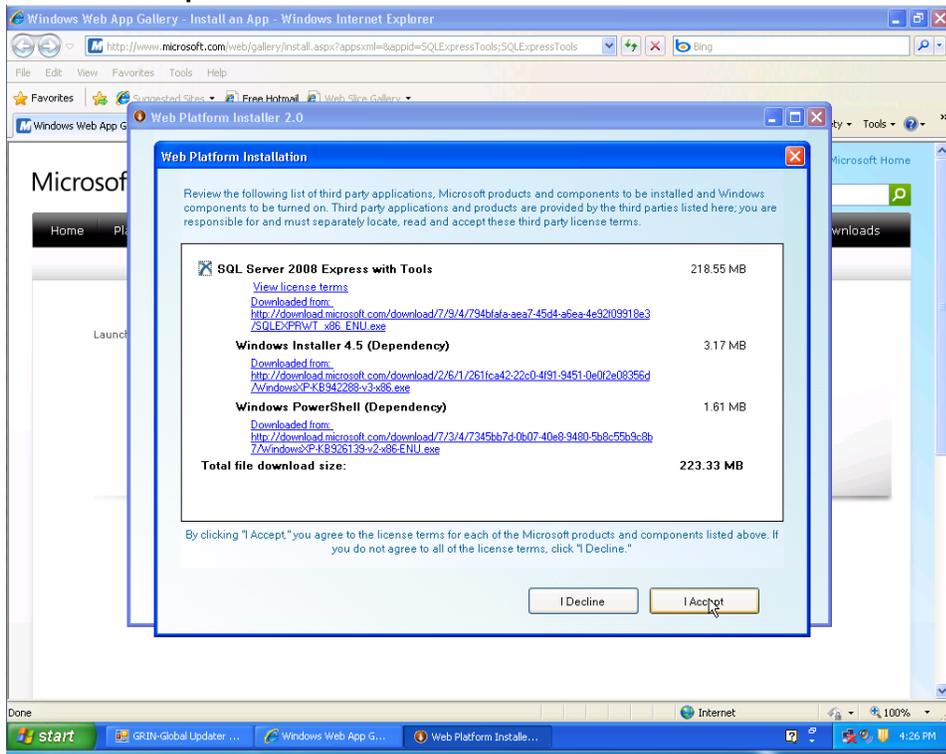
As part of the installation, Microsoft will install its “Web Platform” installer. Click on the **Get the Microsoft Web Platform** button to proceed.



The SQL Server 2008 Express installation window will display; click on the **Install** button.



Click the **I Accept** button.



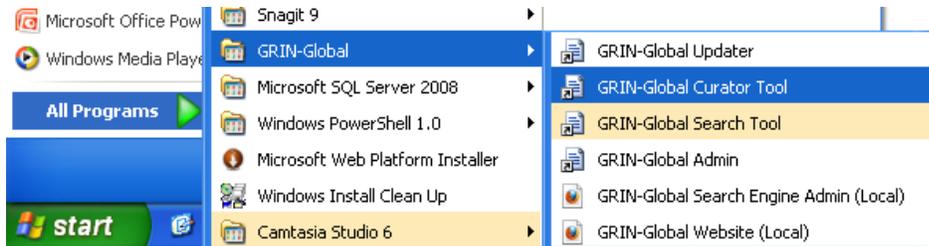
Authentication Mode

If prompted for authentication mode, select **Windows Integrated Authentication**.

Starting the Curator Tool

Start the Curator Tool

Select the **GRIN-Global Curator Tool** from the Windows program menu.



You can also add the shortcut to the Start menu or the desktop. Select **Start | All Programs | GRIN-Global**; highlight the GRIN-Global Curator Tool program, then right-click. Select either **Pin to Start menu**, or **Create Shortcut** (desktop shortcut), or both.

Connecting the Curator Tool to a GRIN-Global Server

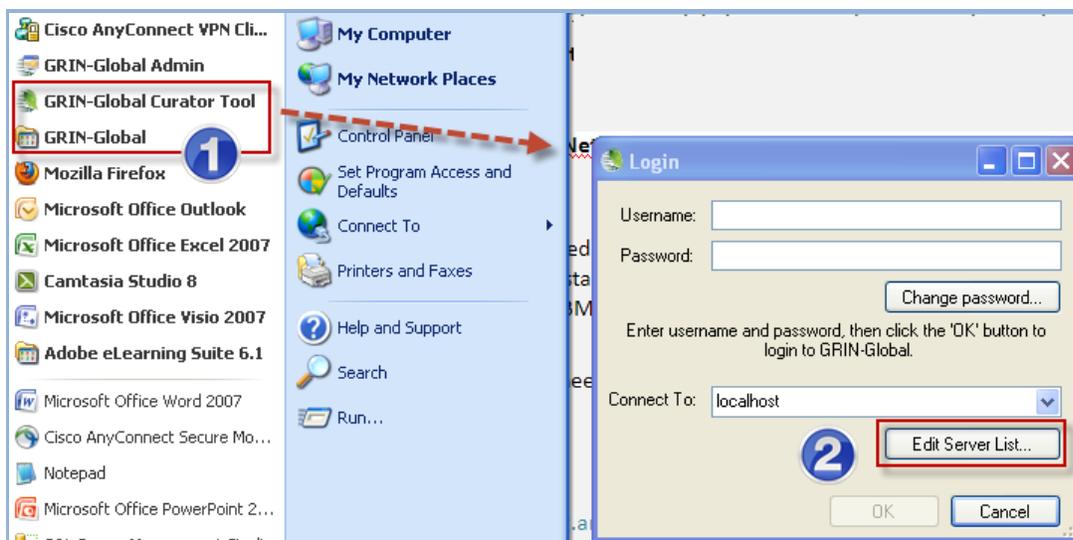


In NPGS, users must be on **ARSNet** or use the VPN to connect to the public web site or to use their Curator Tool.

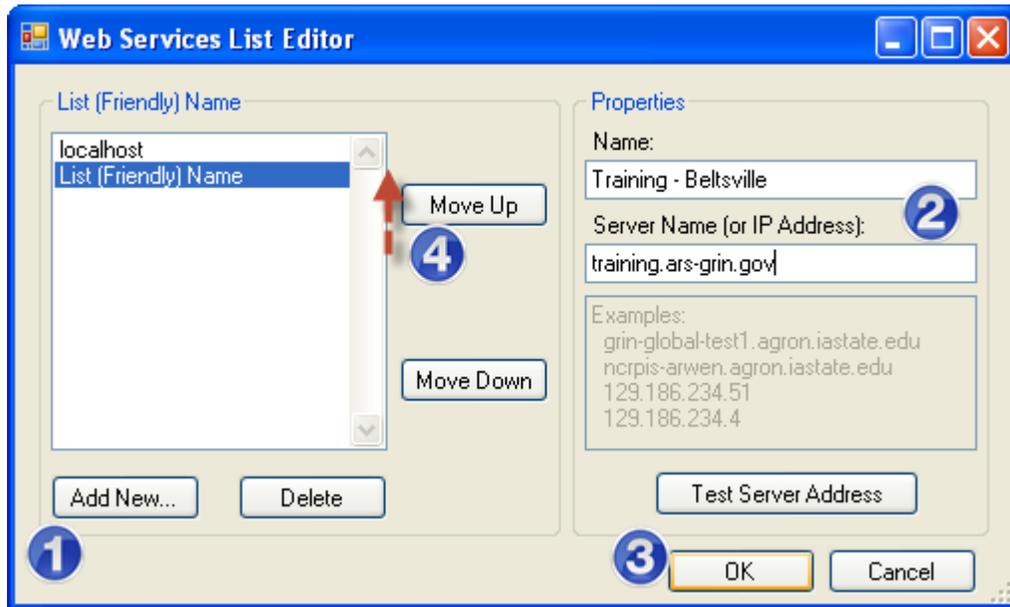
When the Curator Tool is installed on the PC, it initially points to **localhost**. (“localhost” is the name for a “server” that was installed on your PC during the installation.)

Initially, you need to manually establish a connection to the DBMU remote sever. You will only need to do this once.

At the **Login** window, click the **Edit Server List** button:



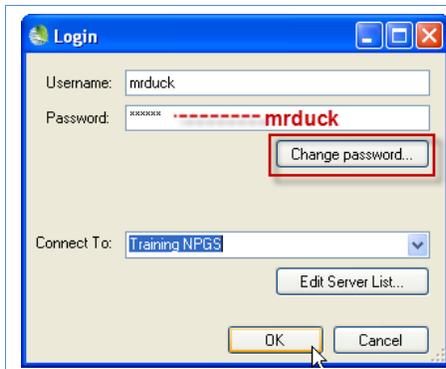
Click the **Add New** button; provide the server information: training.ars-grin.gov; click **OK**; click the **Move Up** button.



(The **Move Up** Button positions the **Training** server above the **localhost** so that the **Training** server becomes the default server displayed in the Login Window in future CT launches.)

User Logins & Passwords

In GG, we are using the same Username convention as GRIN. For example, **dbmuzz**. The default password is then also **dbmuzz**. Note that GG and GRIN are unrelated – if you change your password in GRIN, it does not impact GG (or vice versa).



During training, the GRIN-Global logins are the same as they are in GRIN. If your GRIN ID was **mrduck**, it is still **mrduck** in GRIN-Global. However, in GRIN-Global, the passwords are initially set to match the GRIN-Global ID – not your GRIN password.

Click on the **Change password...** button if you intend to change your password. There are no restrictions or length requirements enacted during this training phase

Handling Users Who Do Not Have Windows Administrator Privileges

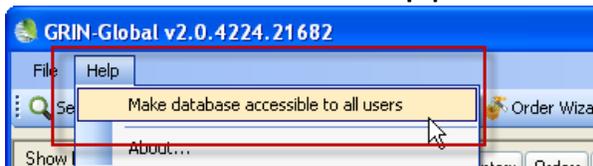


To complete the following steps, you must have administrator rights on the PC

For security reasons, a user's PC can be setup so that the user does not have full Windows Administrator rights to his / her PC even though that user may be the primary (or only) user of the PC. When that is the case, the organization's PC Administrator, usually someone from the organization's Information Technology or Security group, will need to install GRIN-Global.

During the installation of the Curator Tool, a copy of Microsoft SQL Server Express is also loaded on the user's PC – *always*. The administrator will also need to perform an additional step so that the GRIN-Global user can access the database of lookup tables that is installed on the PC. The person installing the Curator Tool (with Windows Administrator Privileges) needs to start up the Curator Tool

Start the **Curator Tool**. Select **Help | Make database accessible to all users**:



Installing with Firewalls

Two Setup Files are Involved in Setting Up the GRIN-Global Updater Application

"...setup.exe"

This is the **GRIN-Global Updater** file that is accessed via the link under the *Installers* section of the GRIN-Global downloads page:

(<http://distribution.grin-global.org/gringlobal/downloads/default.aspx>.)

Installers		
View GRIN-Global disclaimer		
File	Modified	File Size (MB)
GRIN-Global Updater	2011-07-27 12:47:17 PM -04:00	0.65 MB

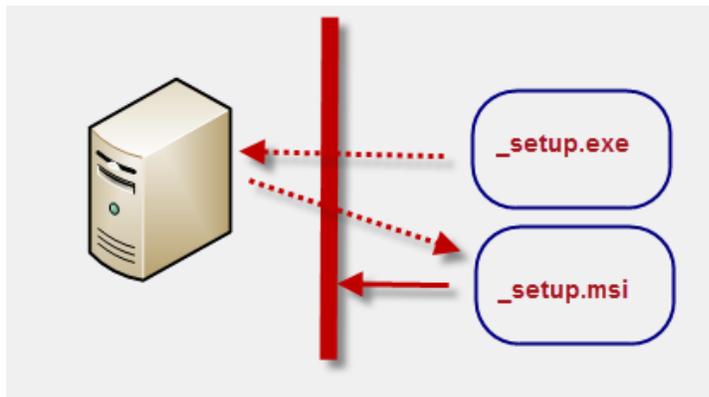
This **setup** program will automatically check your system to ensure all system components and applications required by the GRIN-Global **Updater** program are properly installed on your computer. If any prerequisite is not detected by this **setup** program, it assists with the downloading and installing of the missing component before allowing the **Updater** program to be installed.

“...setup.msi”

After **setup** is satisfied that all **Updater** prerequisites have been successfully installed on your computer, it downloads and runs a second file (the **GrinGlobal_Updater_Setup.msi**) to complete the Updater installation process. You will know the **GrinGlobal_Updater_Setup.msi** file has successfully downloaded and started properly when you see the “Updater Setup Wizard” steps on your screen.

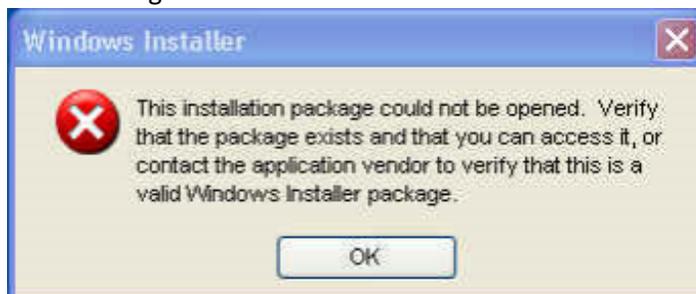


Unfortunately, some organizations have a firewall that prevents the second of the two GRIN-Global installation files from properly downloading:



(The actual file names are **GrinGlobal_Updater_Setup.exe** and **GrinGlobal_Updater_Setup.msi**.)

How can you know if the .msi is not able to get through the firewall? During the installation process, after you have started the **Grin-Global_Updater_Setup.exe** file, you should be prompted to run the .msi file – if you receive an error message similar to the following, then the firewall is preventing the .msi file from running:



When this situation exists, and if you have previously installed GRIN-Global, you may run into the situation where *it appears that everything is okay, when in fact an old version of the msi file will run on your PC, and will not run the correct version of the GRIN-Global Updater program.*

If your organization has a firewall that prevents you from downloading the msi file, an alternative is to download the compressed file **GrinGlobal_Updater_Setup.zip** that contains both the **.exe** and the **.msi** files.

Directions for installing GRIN-Global Updater when your organization has a firewall are detailed below.

When a Firewall is Active

If your organization has a firewall:

1. Download the “zip” file **GrinGlobal_Updater_Setup.zip** from the GRIN-Global downloads page: (<http://distribution.grin-global.org/gringlobal/downloads/default.aspx>.)

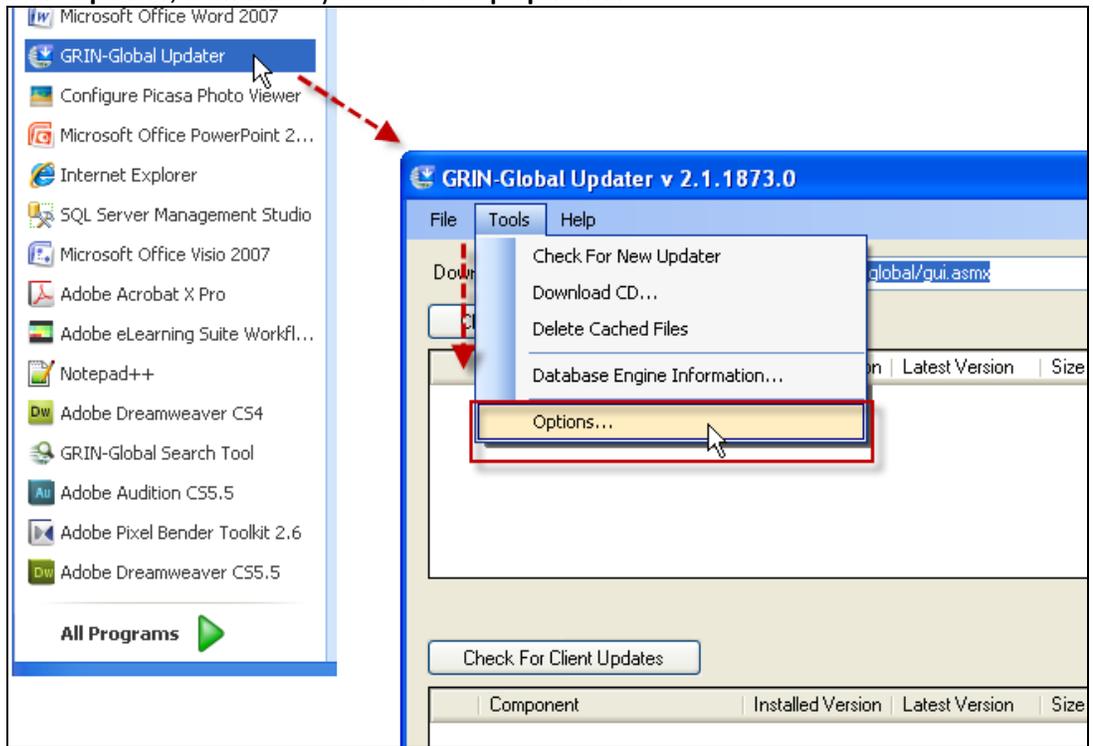
Other Supporting Files		
File	Modified	File Size (MB)
GrinGlobal_Updater_Setup.zip	xxx	xxx

2. The two setup files, the **.exe** and the **.msi** files are contained in the zip file. (**GrinGlobal_Updater_Setup.exe** and **GrinGlobal_Updater_Setup.msi**)

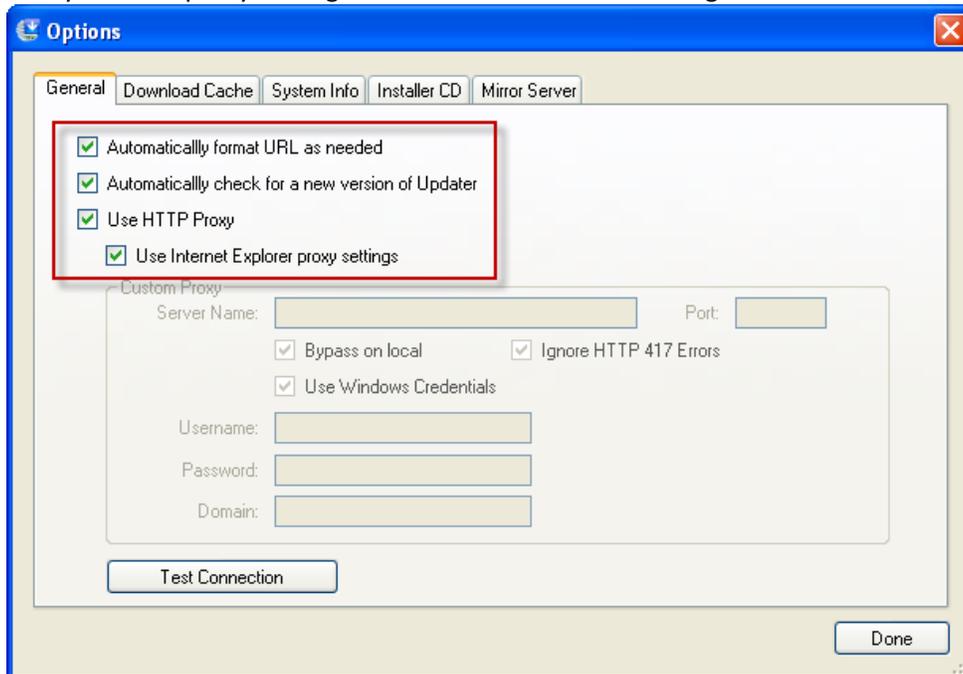
Unzip (extract) the two files into one folder on your computer’s hard drive.

3. Run **GrinGlobal_Updater_Setup.exe**
4. After the Updater application has been successfully installed on your computer, **do not attempt to download or install any GRIN-Global applications (including any updates to the Updater application itself) until you have properly configured the HTTP Proxy settings in the Updater application.**

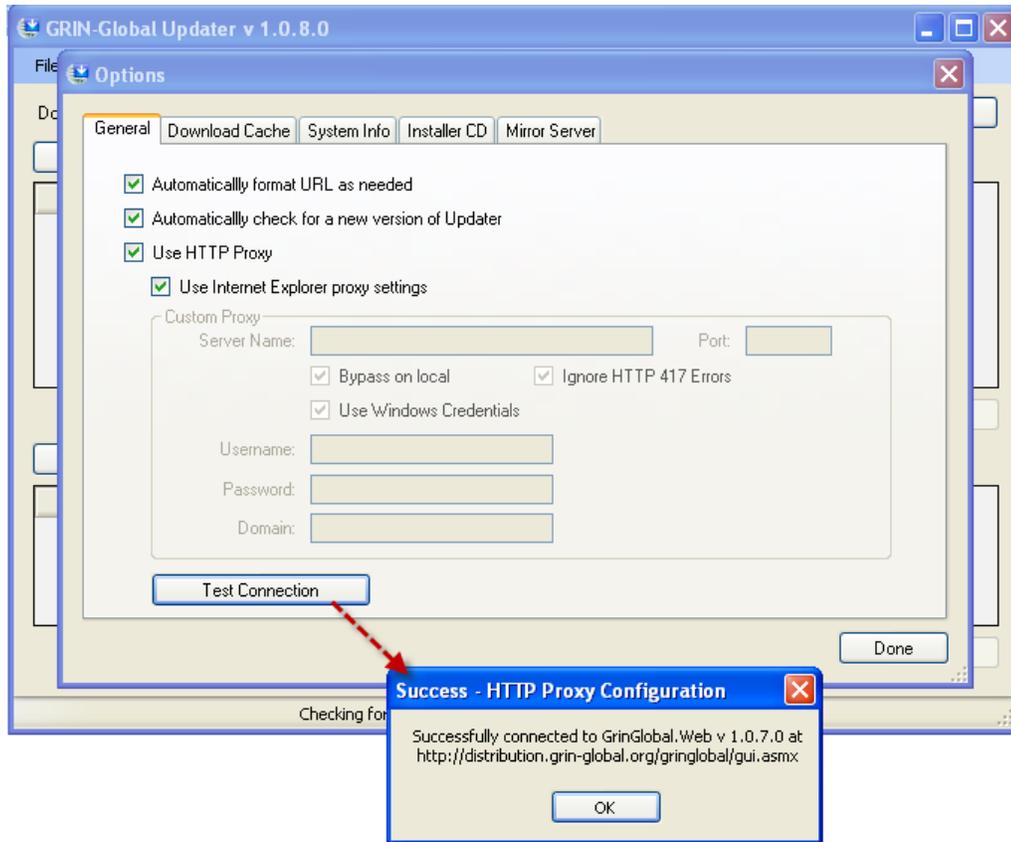
Start **Updater**; immediately select **Tools | Options...**



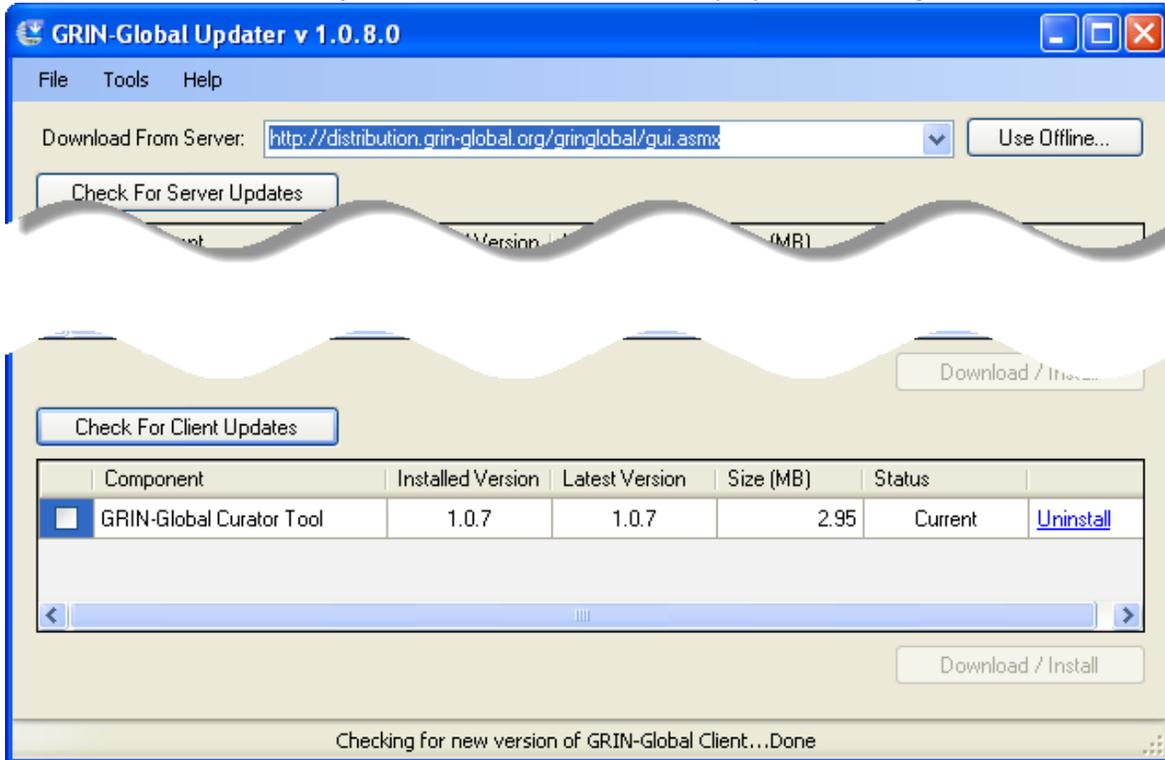
5. Verify that the proxy settings are set similar to the following:



6. Test the connection:



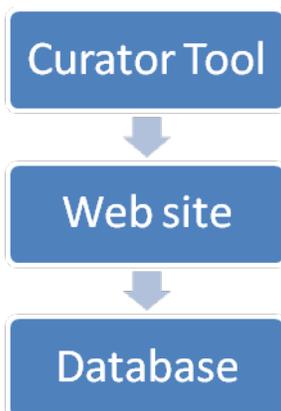
The current version of the **Updater** on “distribution” will display the following:



The versions will change of course.

How to Troubleshoot Connection Problems

GRIN-Global is essentially a three-tier system: outermost being the Curator Tool, then the web site, and finally the database. Troubleshooting connection issues can be tricky because each layer must be able to talk successfully to the next deeper one.



If you are still having difficulties with the installation after having followed the steps above, check with your local systems administrator or contact feedback@grin-global.org.