# Curator Tool
# Installation Guide

**Revision Date**
July 2, 2013

This guide contains an overview and step-by-step directions for installing the GRIN-Global Curator Tool. In the NPGS, the user's PC will be networked to the main GRIN-Global database server at a remote location (Beltsville).

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

*Changes in this Document*

**– July 2, 2013**

- Updated name of the server to be used when updating the latest Curator Tool

**– 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?

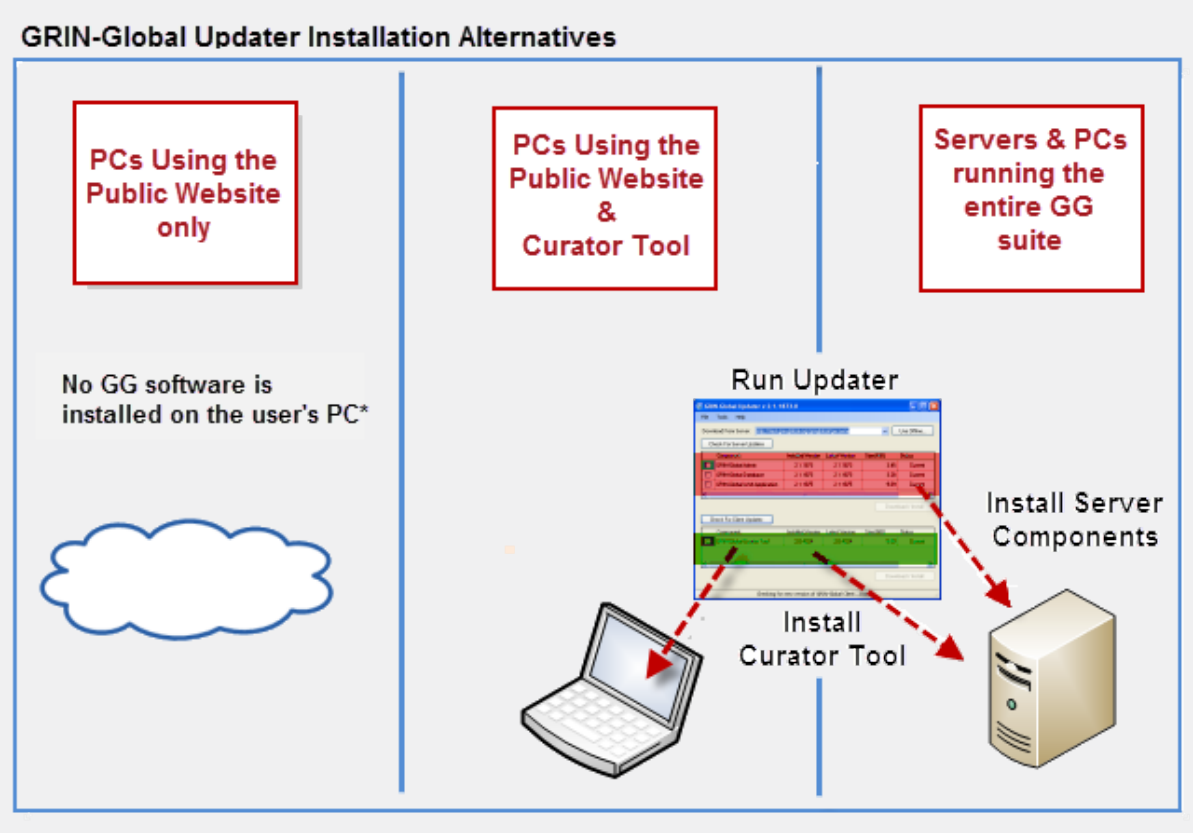
In NPGS, there are two main GRIN-Global components that will be used:

- **Public Website** (PW) – the user accesses the PW via a browser window, typically Internet Explorer or Firefox. No additional software is needed, other than the browser. Recommendation: Bookmark the URL: http://training.ars-grin.gov/gringlobal

- **Curator Tool** (CT) – the GRIN-Global **Curator Tool** is installed on the user's PC. The Curator Tool is a "client" application – it is used to connect to a remote NPGS server in Beltsville. This document includes detailed instructions for installing the Curator Tool on a user's PC and connecting to the NPGS server.

Note

*Not all GRIN-Global users need to install all of GRIN-Global's components.* In some smaller genebanks, the user's PC may also function as a server, but since you will be accessing a networked server in the NPGS, there is no need to install any of the server components. NPGS users will be setup as shown below with the middle alternative.




Note

The GG Updater program is first downloaded onto the user's PC. After it is downloaded, the Updater is run, and it will prompt you to install various GG components – however, in NPGS, only the Curator Tool, the client application, needs to be selected.

## 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 27
- 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 (Ultimate; 32- or 64- bit)

Note

GRIN-Global cannot run on Windows 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.

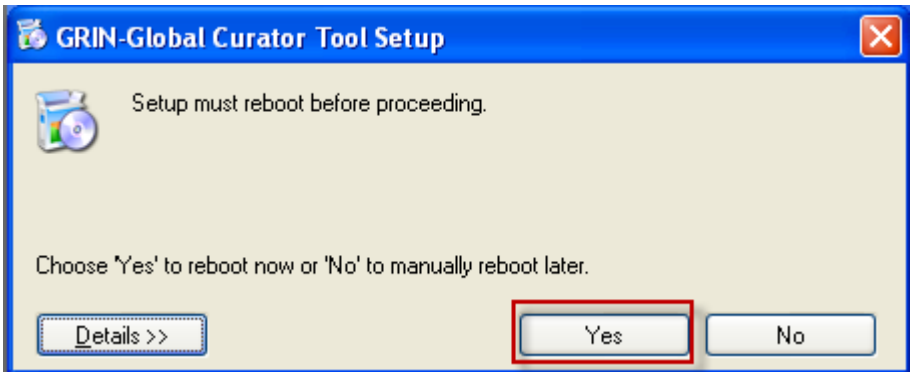
Another installation consideration is whether there is a firewall set up. If your organization has a firewall, read the *Installing with Firewalls* section before continuing with these directions.

## Installing the GRIN-Global Updater Program

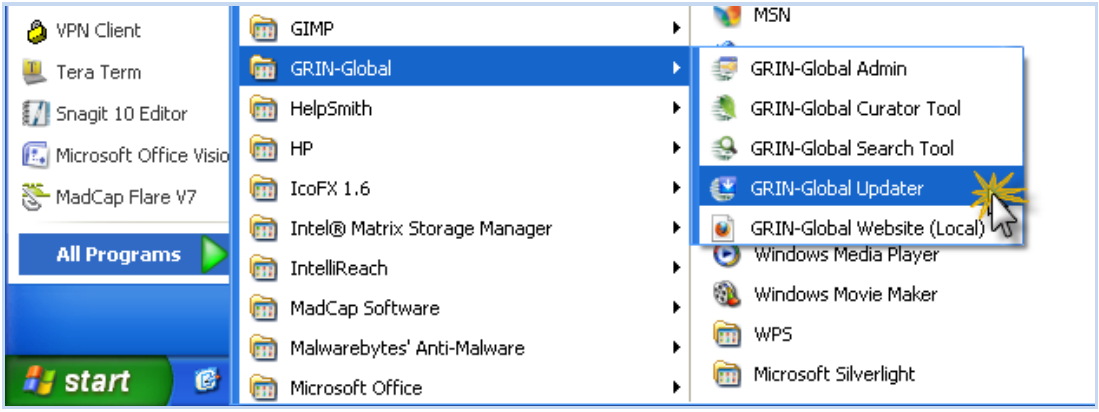
You first install the GRIN-Global **Updater** program in order to install any of the other GRIN-Global components. The following installation instructions provide step-by-step instructions; however, if your organization has a firewall, read the *Installing with Firewalls* section on page 27 before following these directions.

Note

Sometimes when installing a Microsoft application, 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 launch **Updater** manually again. (Click the Windows **Start button**; select **GRIN-Global Updater**. Reselect the GRIN-Global **Curator Tool** application to install; click **Download/Install**.)

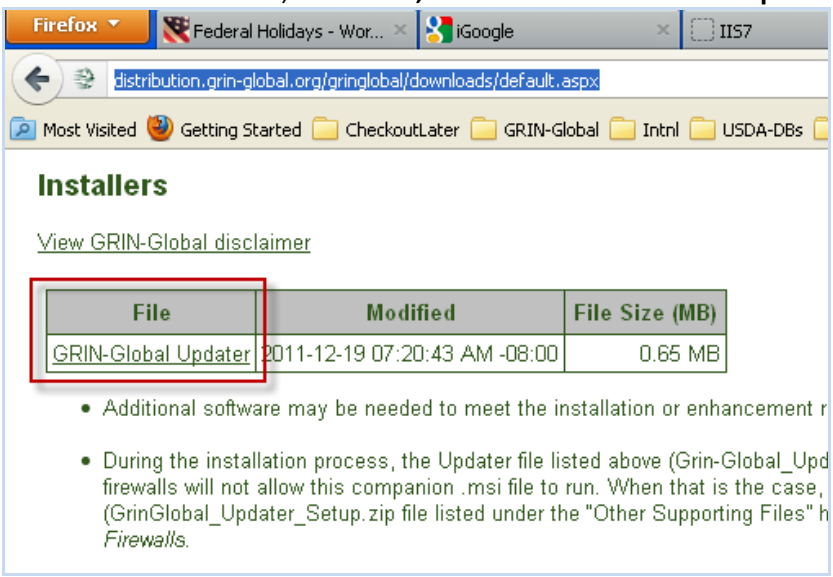


## Step-by-Step Installation Directions

### 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, c**lick the link **GRIN-Global Updater**:

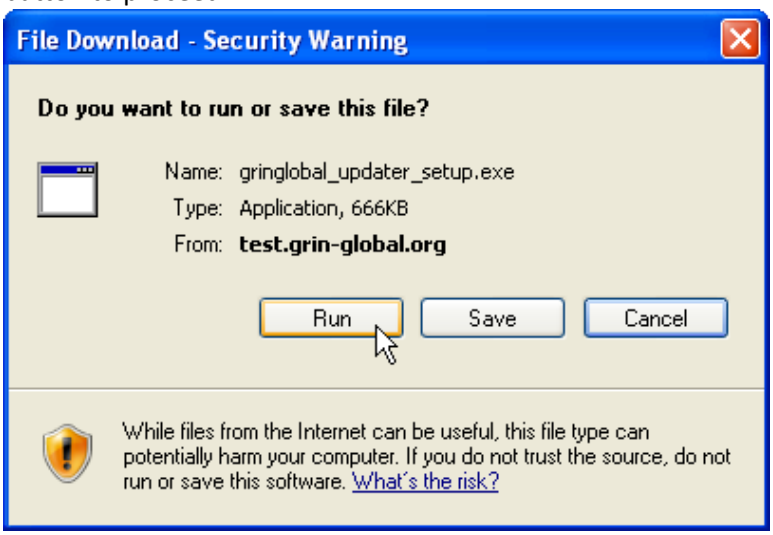



Depending on which browser you are using, your next step will vary slightly. Since most browsers emulate either Microsoft's Internet Explorer or the Mozilla Firefox browser, steps 2A and 2B were written to accommodate the differences.

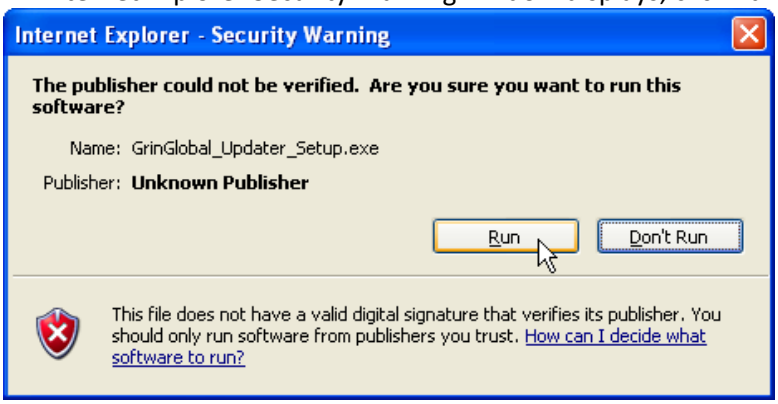
- Proceed with step 2A if you are using Internet Explorer
- Skip to step 2B if you are using Firefox or a similar browser

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

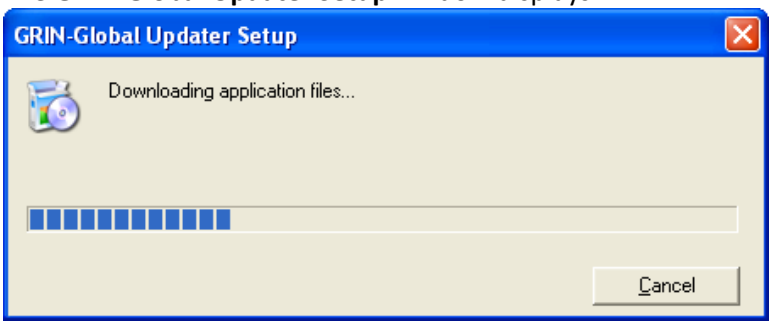
The **File Download** window displays. Unless you want to postpone initiating setup, click on the **Run** button to proceed.




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



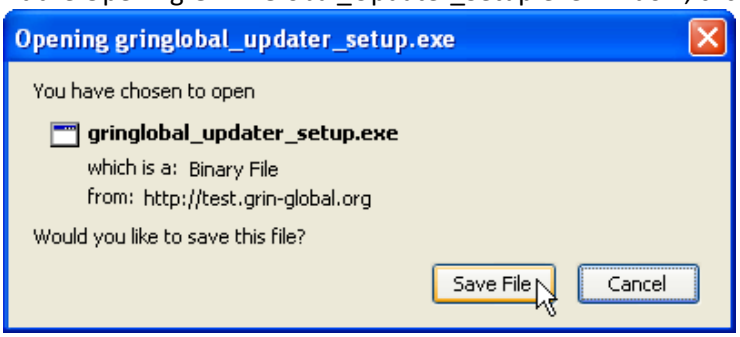

The **GRIN-Global Updater Setup** window displays:



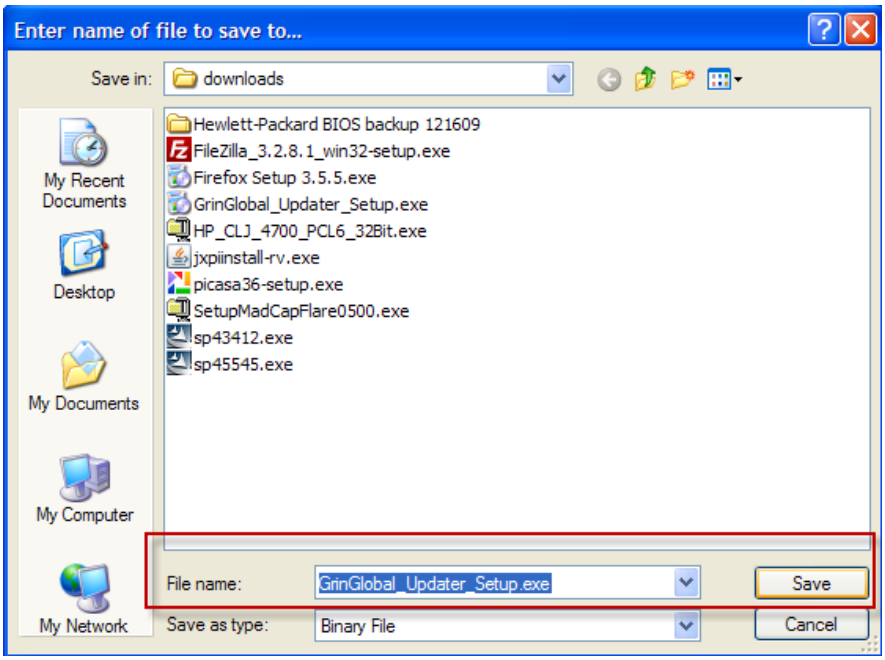

Proceed to Step 3.

### Step 2B: (Using Mozilla Firefox)

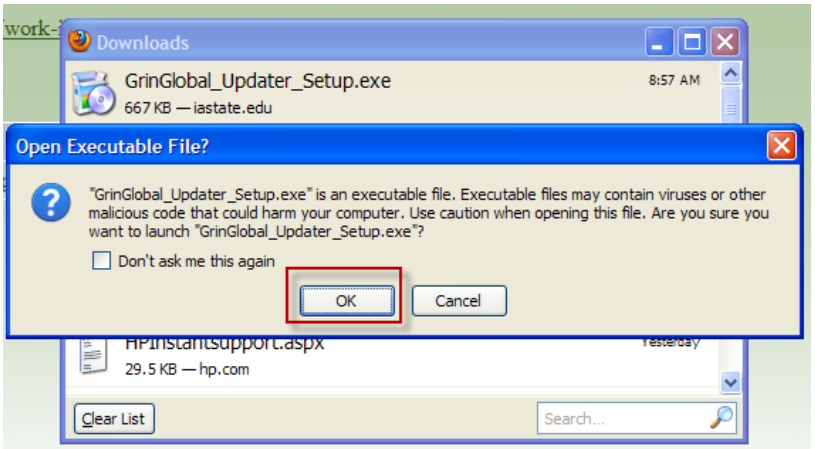
At the Opening GRIN-Global_Updater_Setup.exe window, click the Save File button.



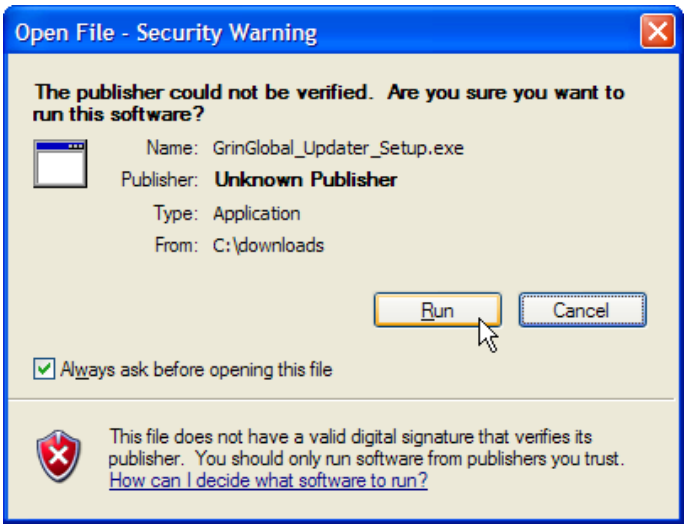

Save the file.




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

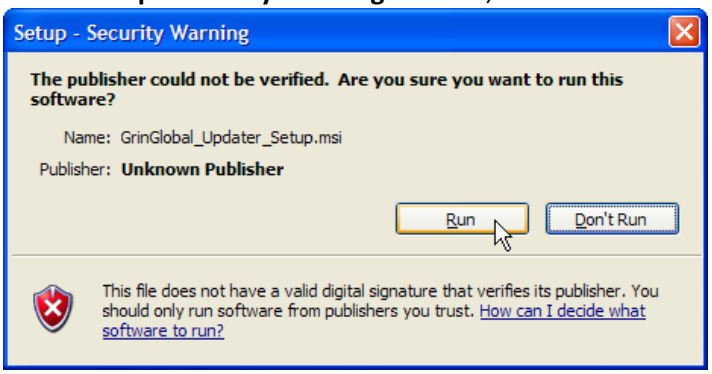


Click the **Run** button.



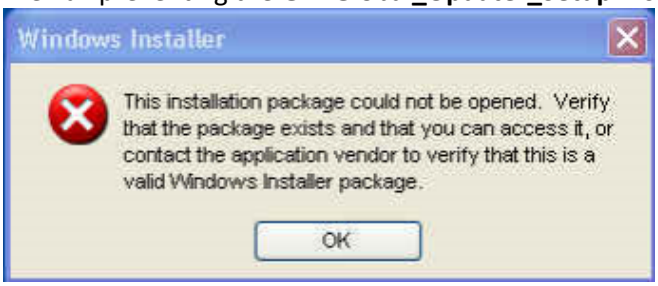

## Step 3

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.

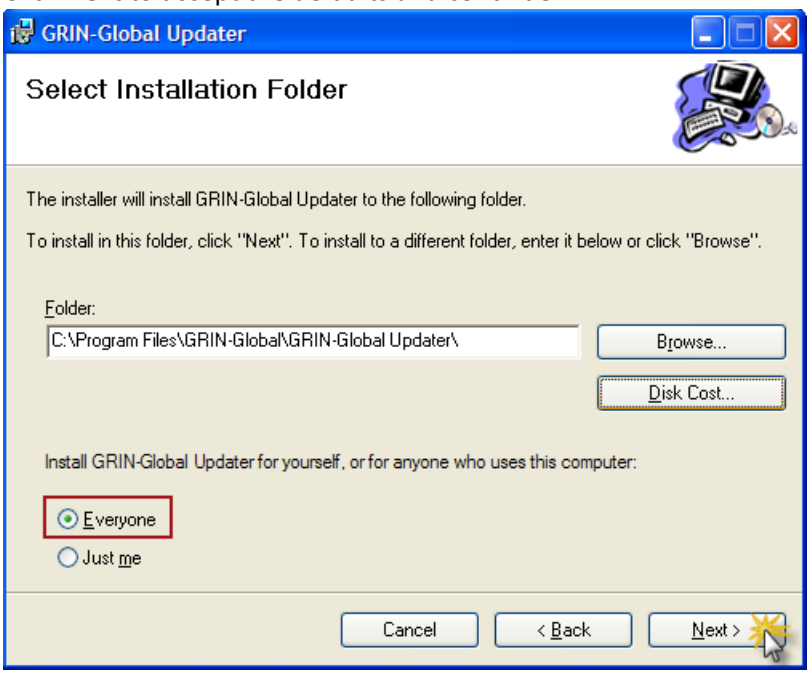
### Step 4

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

### Step 5

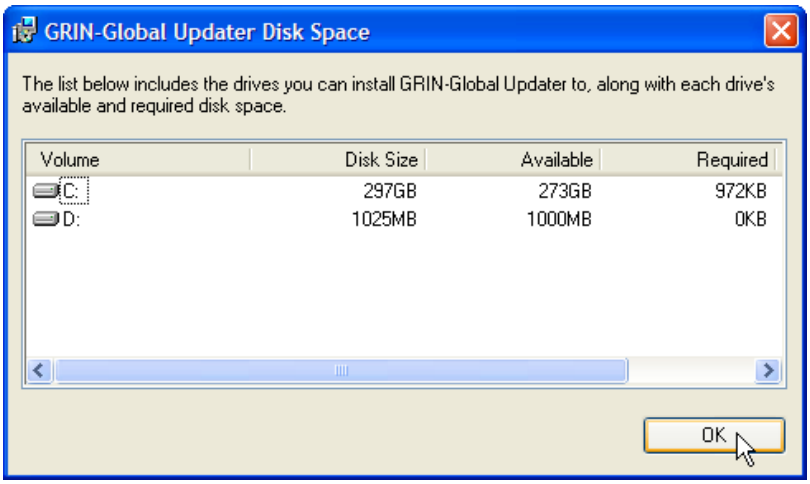
On the **Select Installation Folder** window you can change the default folder location and also indicate who will have access to the GRIN-Global programs (all users (**Everyone**) or the current user (**Just me**)). Generally, you can accept the defaults. If a different location is desired, click **Browse**. (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.



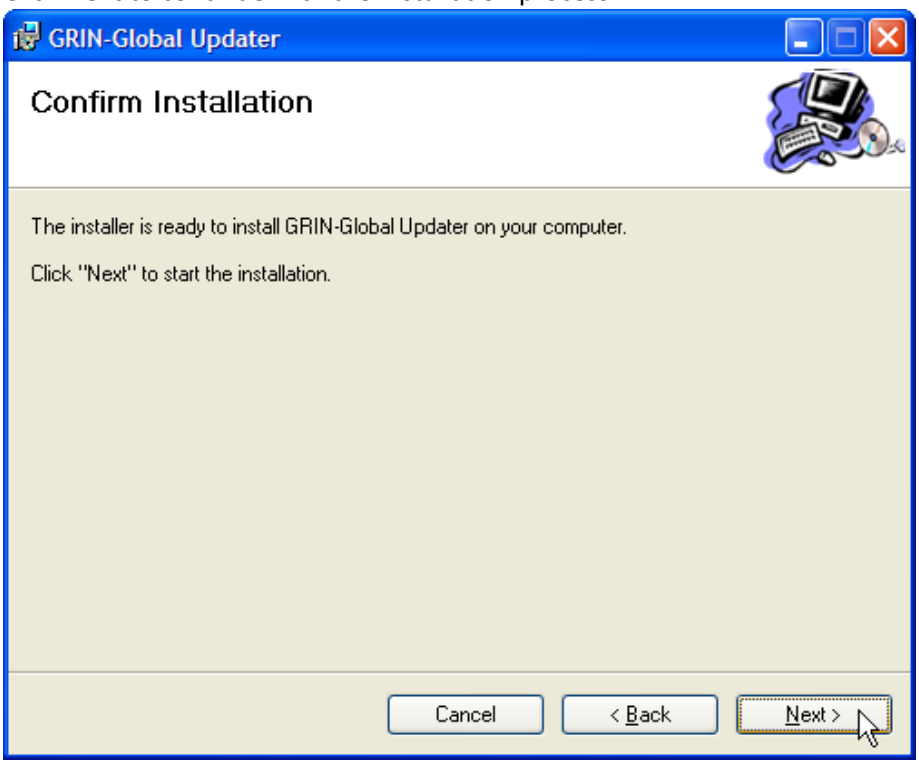

### (*Optional* Step When the Disk Cost Button is Selected)

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.



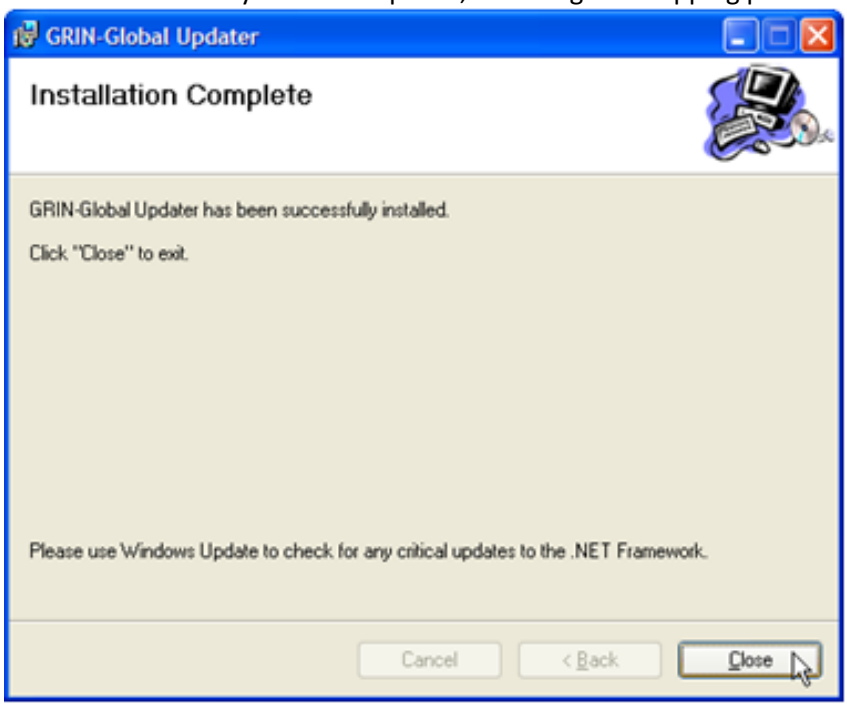
### Step 6

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



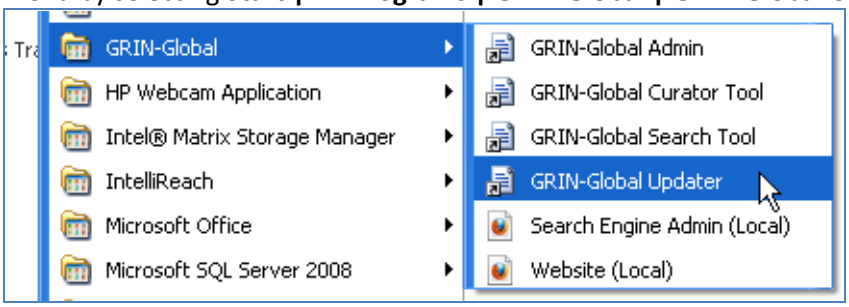

### Step 7

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



### Step 8

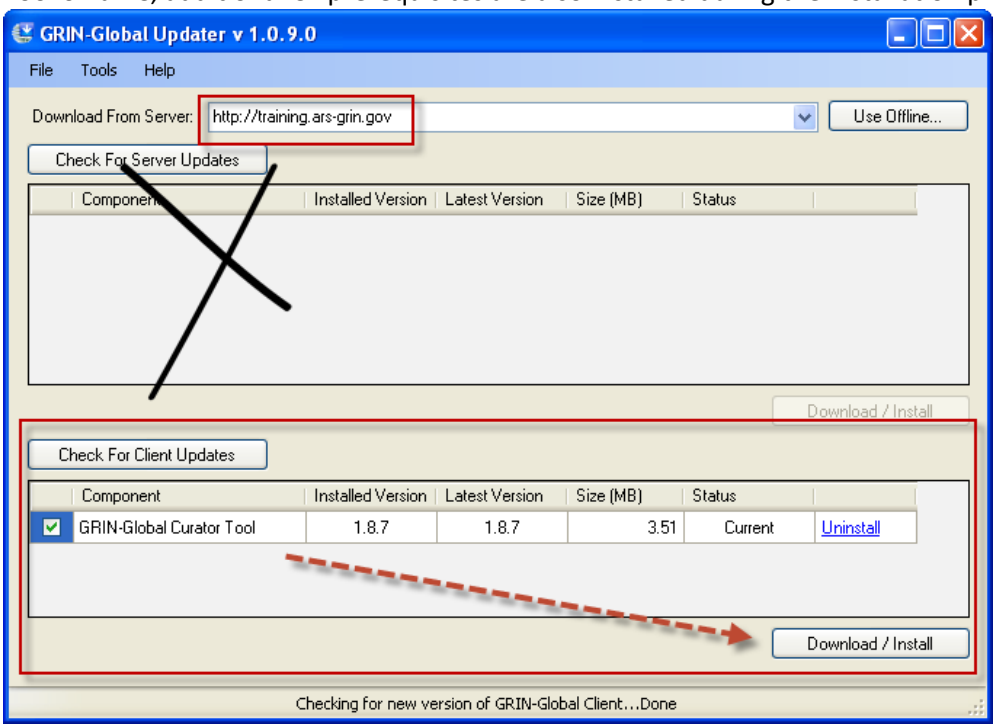
[Note: if you interrupt the installation process, you can return to this point via the Windows **Programs** menu by selecting **Start | All Programs | GRIN-Global | GRIN-Global Updater**.]




## Curator Tool: Installing (or Updating)

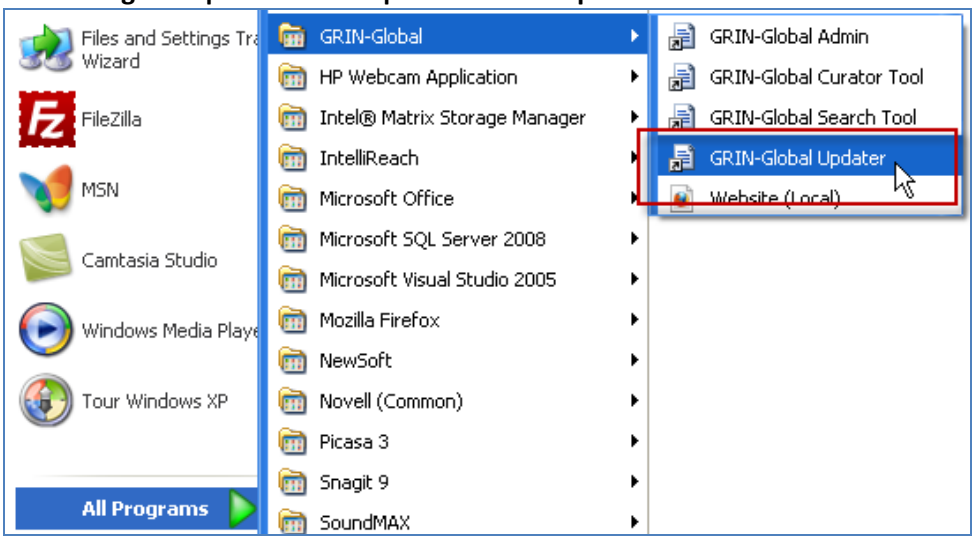
### General Note Regarding the GRIN-Global Updater Window

The **Updater** window is used to check for both server and client updates. At NPGS, we are only loading the **Curator Tool** on user's 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.)

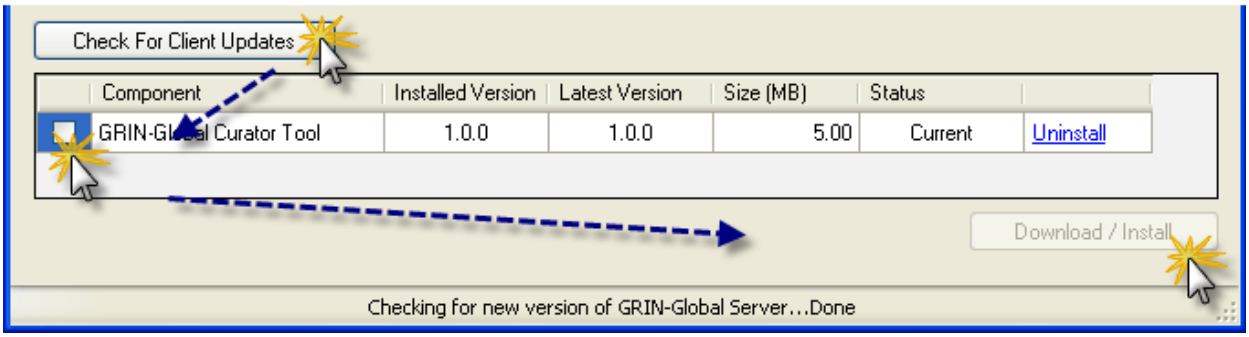


## Starting the GRIN-Global Updater Program

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** .

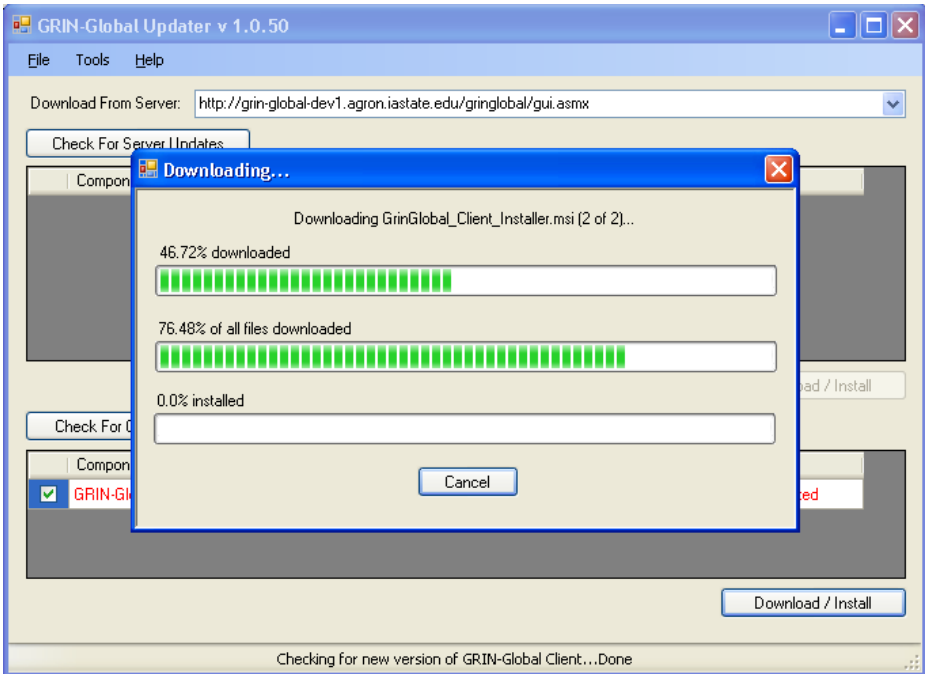


Click the **Check for Client Updates** button. (In the following example, the GRIN-Global Curator Tool component has a "Current" status; hence the **Download/Install** button is not active, since there is no need to download.) However, when installing for the first time, click the **GRIN-Global Curator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

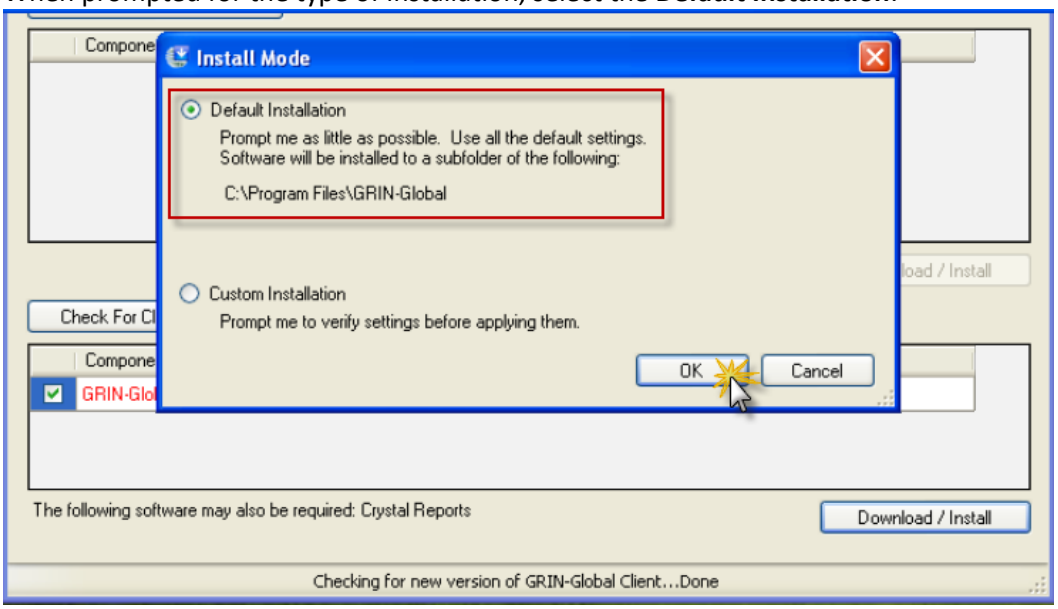



Also, whenever the GRIN-Global Curator Tool component has an "Outdated" status, click the bottom **Download/Install** button; the **Client Installer** program will proceed to download. This should be done when new versions of the Curator Tool are available.

## NPGS: July 2013: Use [http://training.ars-grin.gov](http://training.ars-grin.gov) for the server address



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

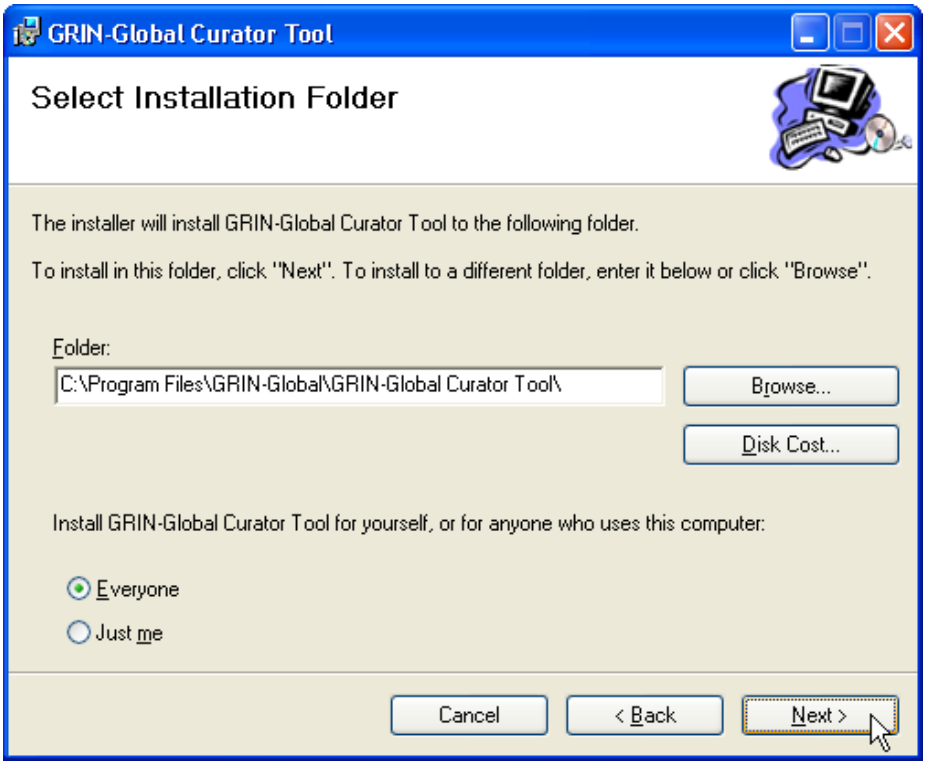



During the Curator Tool installation process, certain prerequisites are expected. If they are not installed, the installation will automatically install these also. If this is a re-installation of the Curator Tool, or if these prerequisites were already installed on the PC, they will not be reinstalled.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

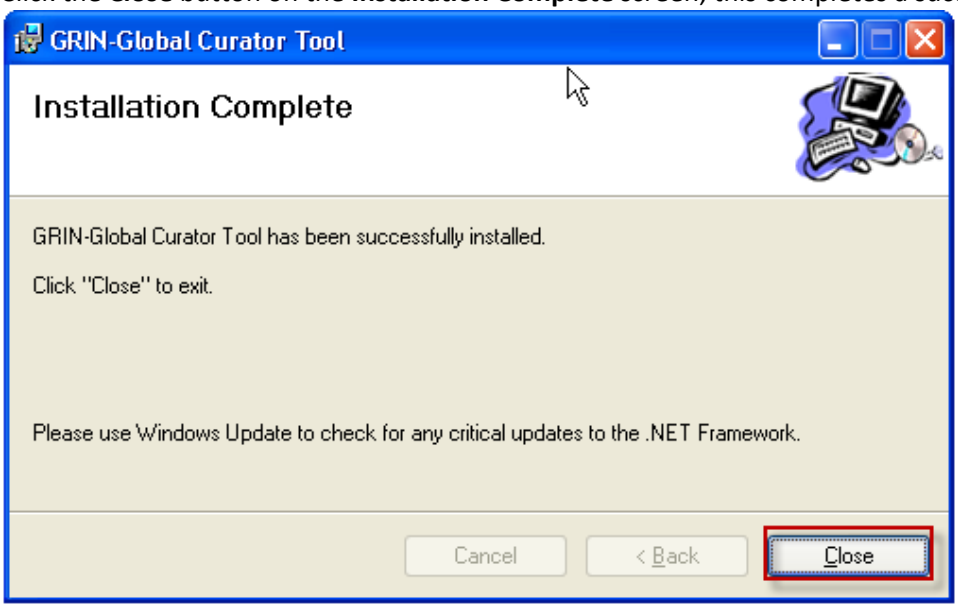
## Curator Tool Installation Wizard

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.

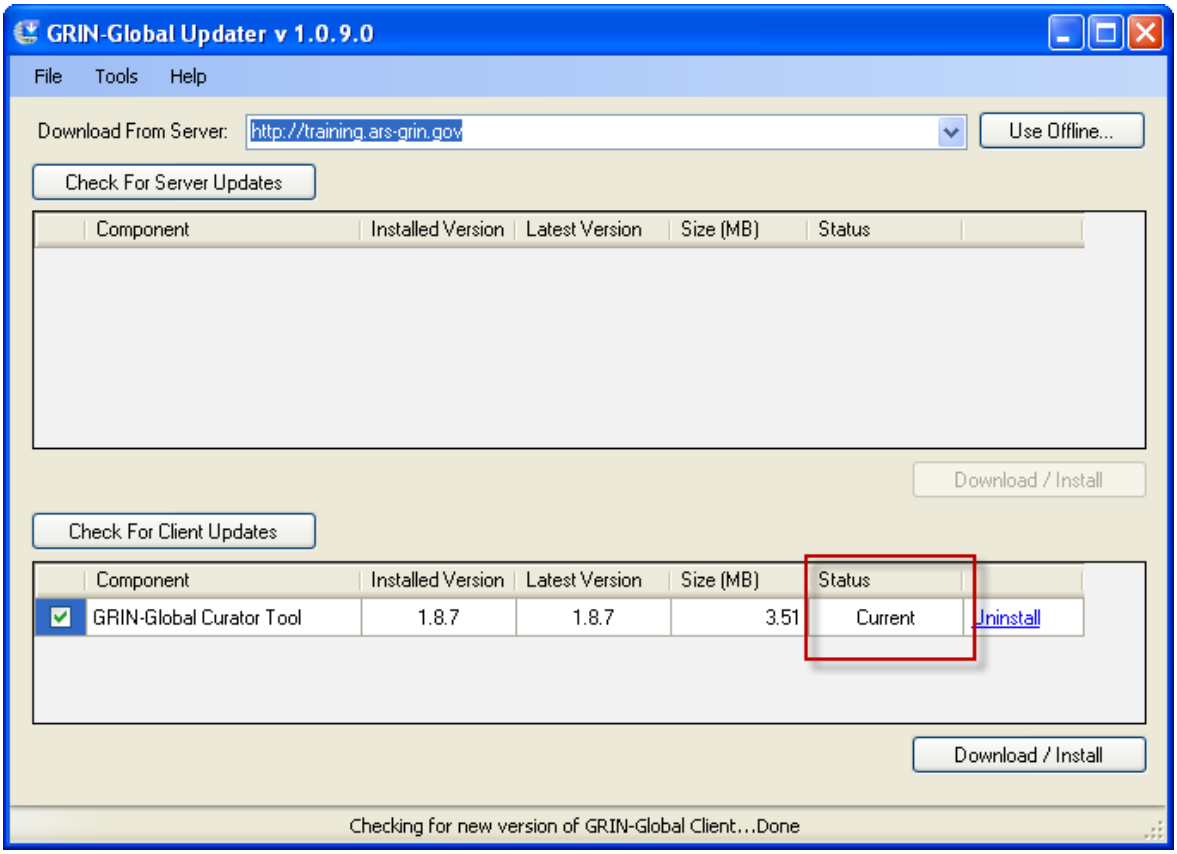



Click the **Close** button on the **Installation Complete** screen; this completes a successful installation.



The Updater window will display the status for the Curator Tool as "**Current**."

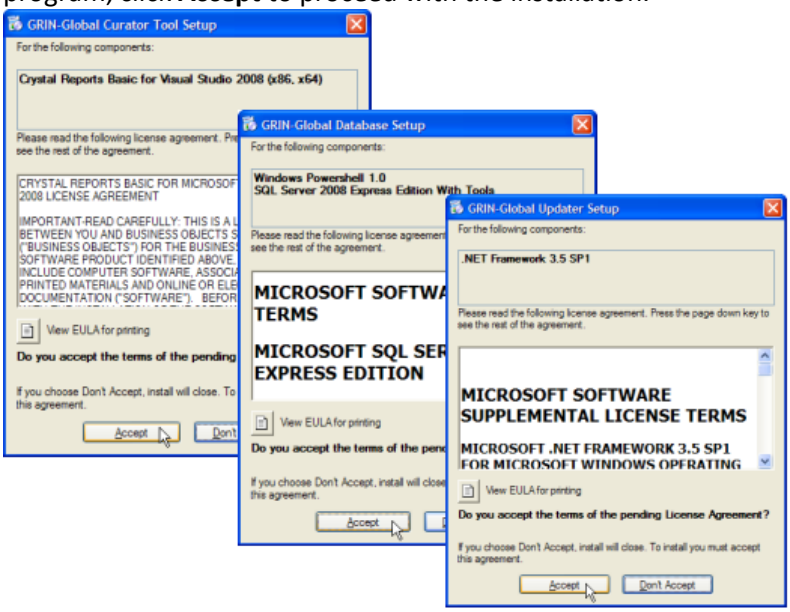
## NPGS: July 2013: Use http://training.ars-grin.gov for the server address



## Installing the Prerequisites

### General Requirements – Installing the Prerequisite Applications

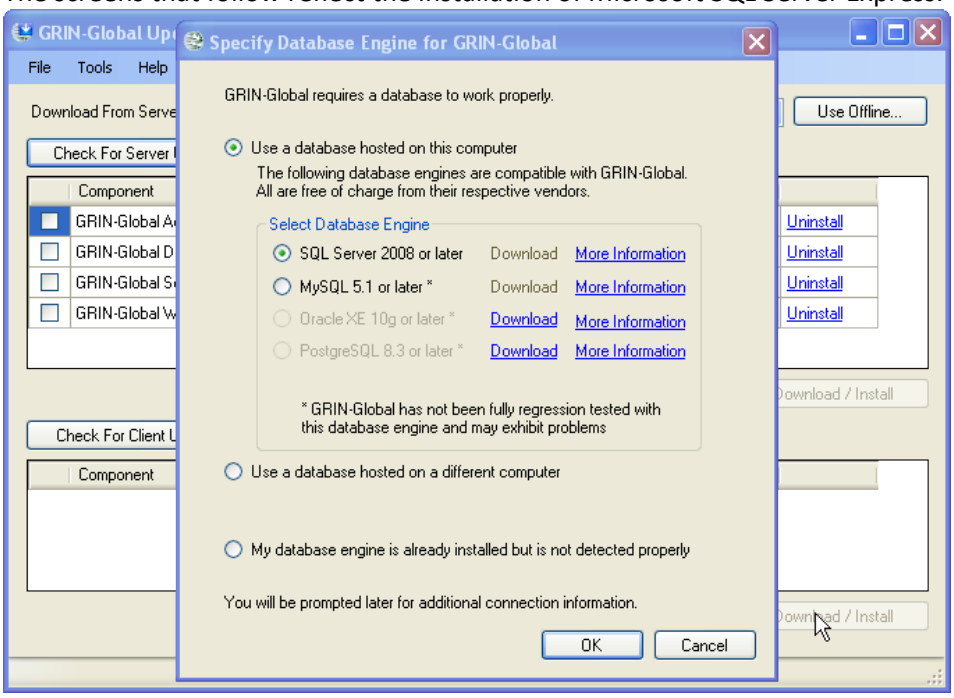
Whenever an acceptance window displays for a Microsoft or SAP's Crystal Reports prerequisite program, click **Accept** to proceed with the installation.



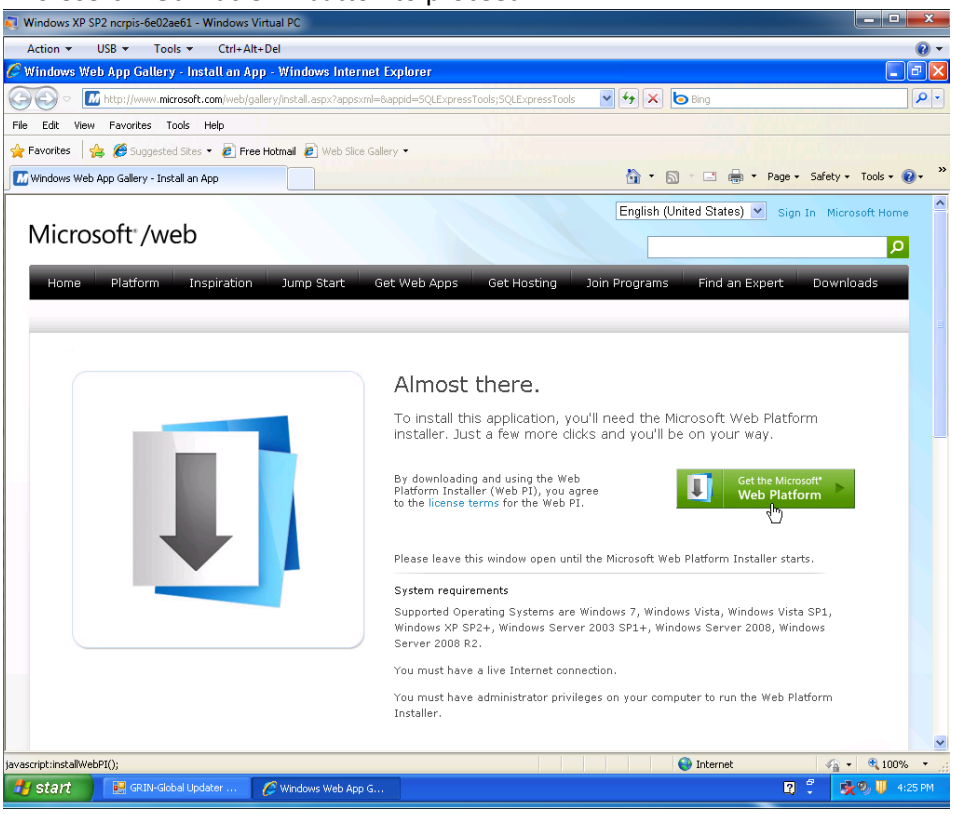

Note

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.

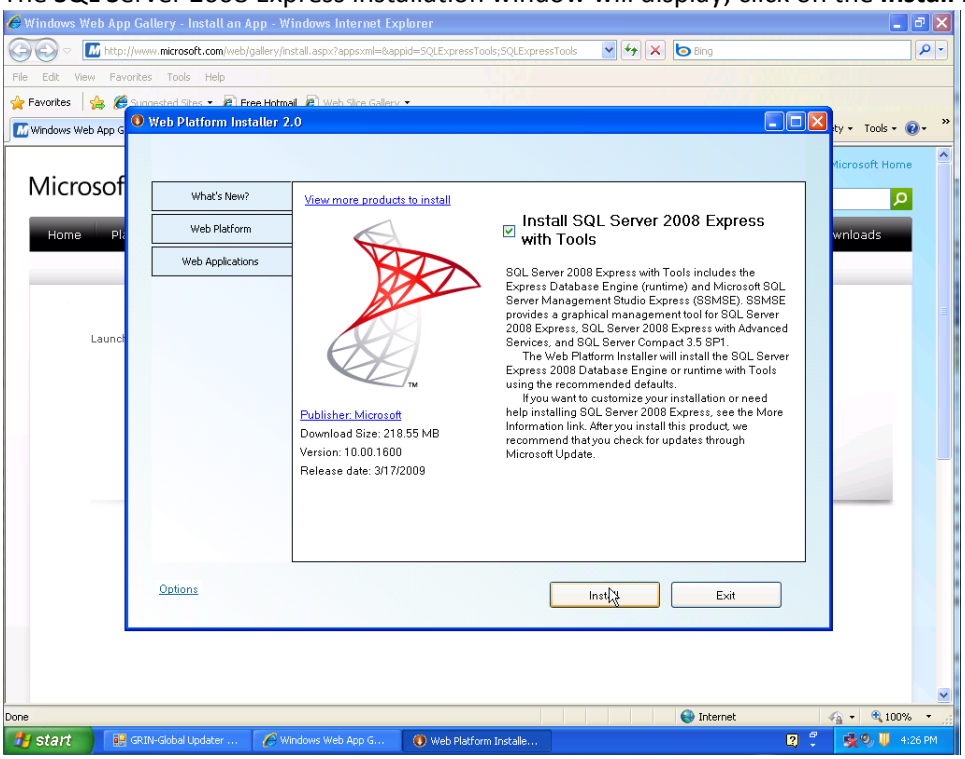
The screens that follow reflect the installation of Microsoft SQL Server Express.



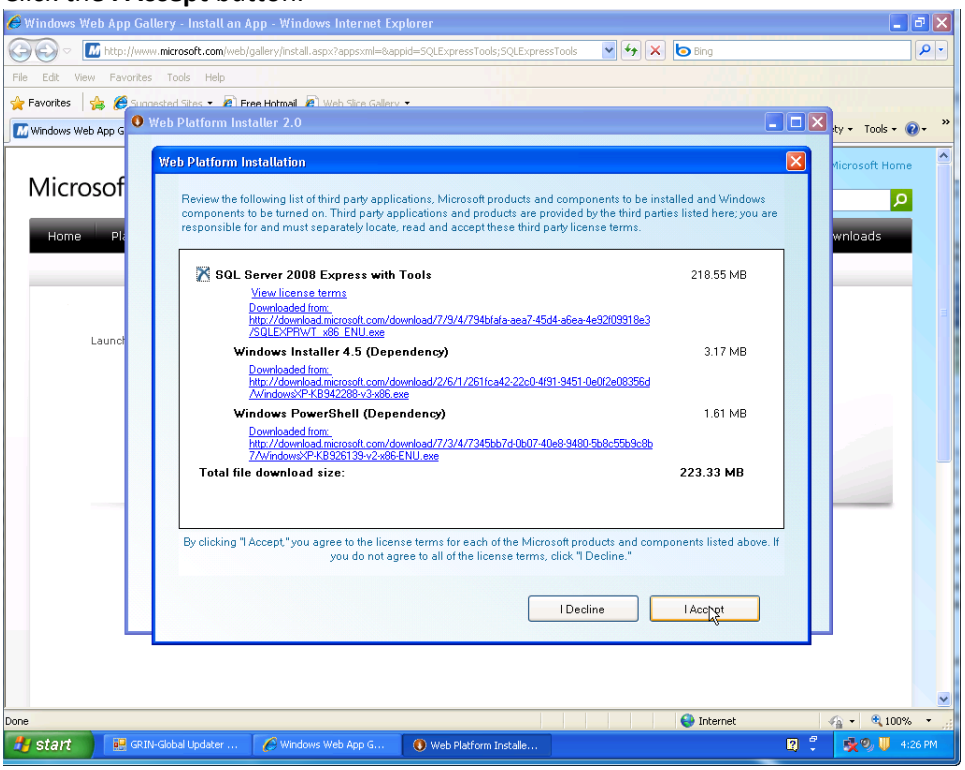
As part of the installation, Microsoft will install its “Web Platform” installer. Click on the **Get the Microsoft Web Platform** button to proceed.




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



Click the **I Accept** button.



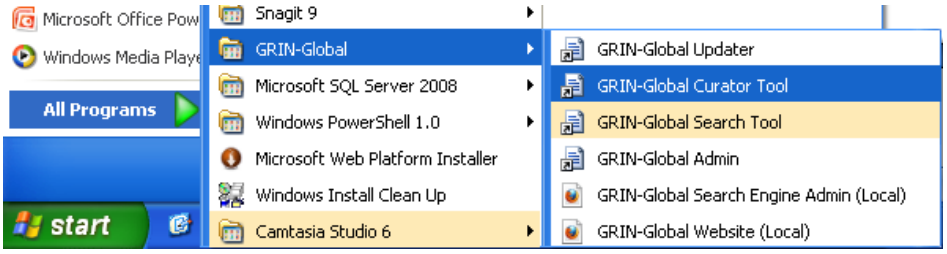

## Authentication Mode

When 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.




Tip

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

Note

Users must be on **ARSNet** or use the VPN to connect to the public web site or to use their Curator Tool.

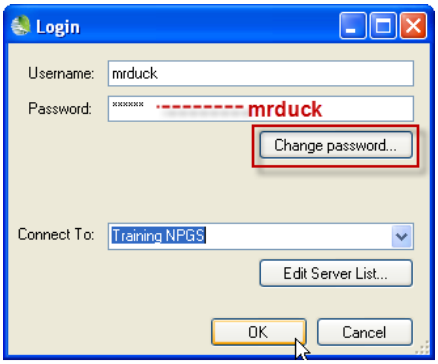
At the Login window, provide thee fields -- your GG Username and Password and the server information:

- **Username** dbmuzz
- **Password** dbmuzz
- **Connect To:** training.ars-grin.gov

The **Connect To:** field indicates the server where the database resides. Complete directions for connecting the GRIN-Global servers to the Curator Tool are explained below.

### 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).



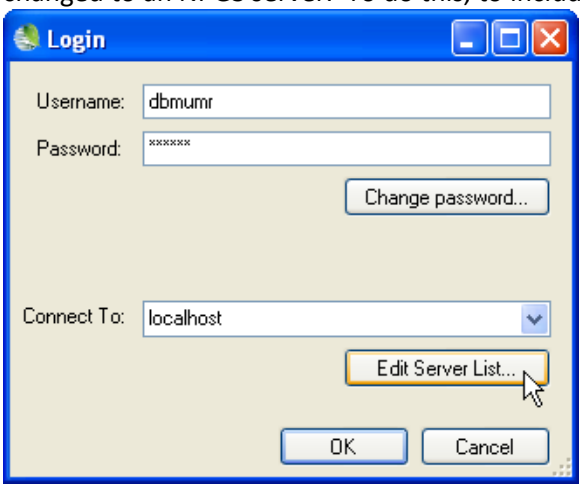

During training, the GRIN-Global logins are the same as they are in GRIN. If your GRIN ID was **mrduck**, it is still **mrduck** in GRIN-Global. However, in GRIN-Global, the passwords are initially set to match the GRIN-Global ID.

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

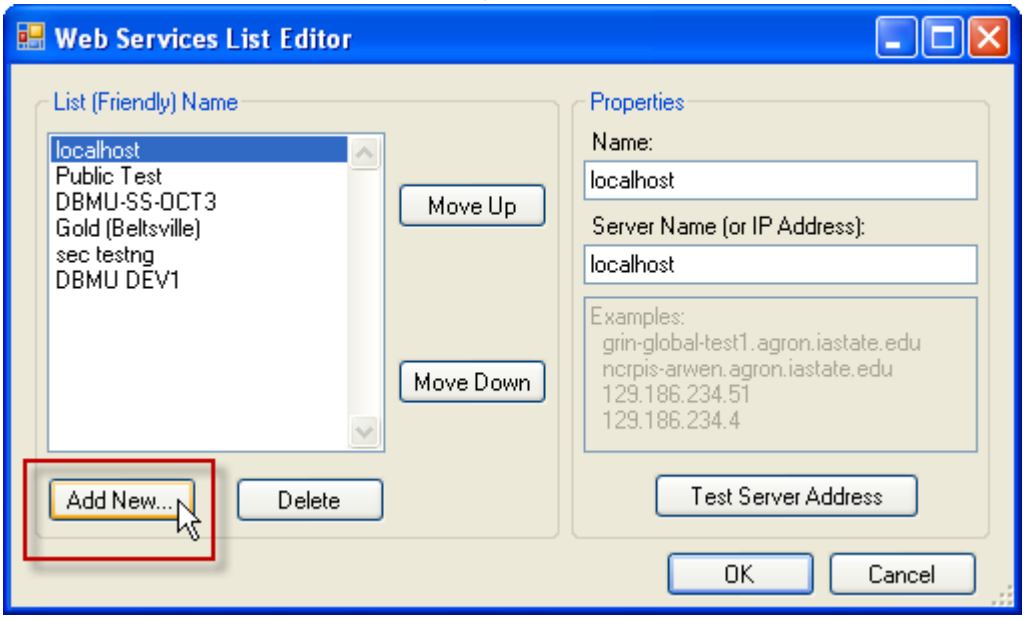
## Changing Servers

In most large organizations, such as the NPGS, the GRIN-Global database will reside on a remote server. (In smaller genebanks, the GRIN-Global suite of applications may be installed on a single user's PC.) In either case, when you login to the Curator Tool you must indicate the GRIN-Global database location.

The default server, "**localhost**," is listed in the **Connect To:** dropdown box: **Localhost** needs to be changed to an NPGS server. To do this, to include another server, click the **Edit Server List...** button:

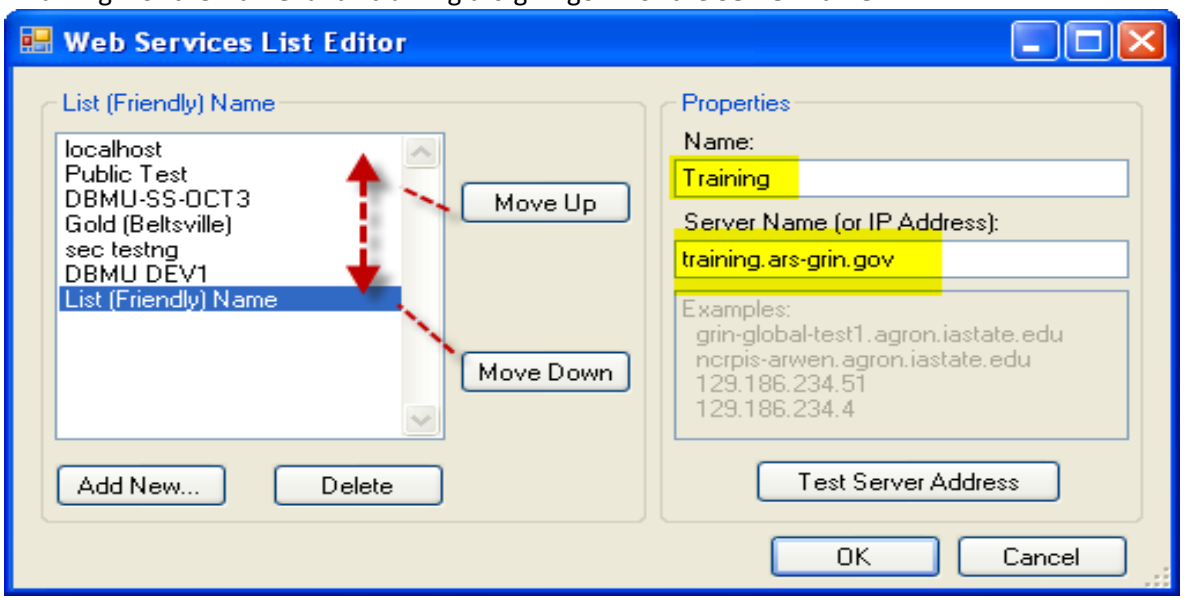



On the **Web Services List Editor** window, click the **Add New** button to add a new server:



A new generic entry will be added at the bottom of the list in the left box, **List (Friendly) Name**.

On the right side of the window, edit the **Name** and the **Server Name** fields. For training at NPGS, enter "Training" for the **Name**: and "training.ars-grin.gov" for the **Server Name**:




Shown above are multiple servers because over time this user was connected to all of these different GRIN-Global servers. Your window of course will not display most of these server names.

Tip

The order of the list can be adjusted by selecting a server and then clicking the **Move Up** and **Move Down** buttons. When working with multiple servers, move the server that is primarily used to the top at the list. The one listed at the top will be listed as the default server when the user logs in.

The IP address may be provided instead of the Server Name. For NPGS Training, the IP address is **199.133.55.98**

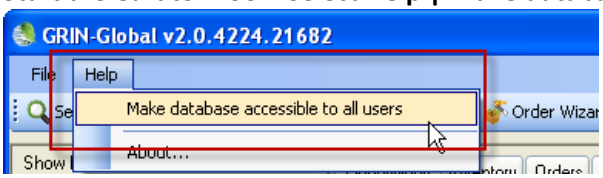
## Handling Users Who Do Not Have Windows Administrator Privileges

Note 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

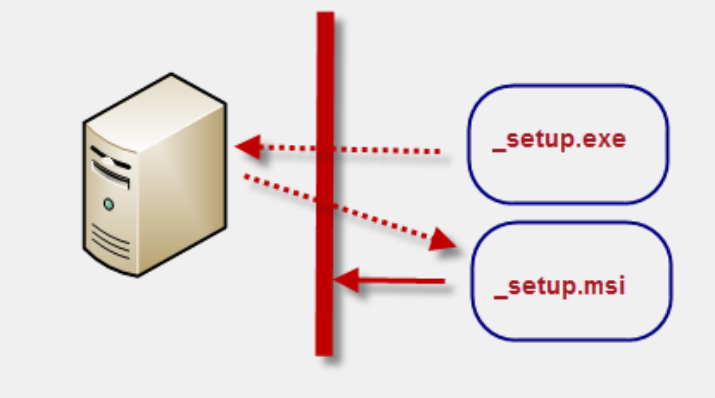
*"…setup.exe"*
This is the **GRIN-Global Updater** file that is accessed via the link under the *Installers* section of the GRIN-Global downloads page:
(http://distribution.grin-global.org/gringlobal/downloads/default.aspx.)

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 |

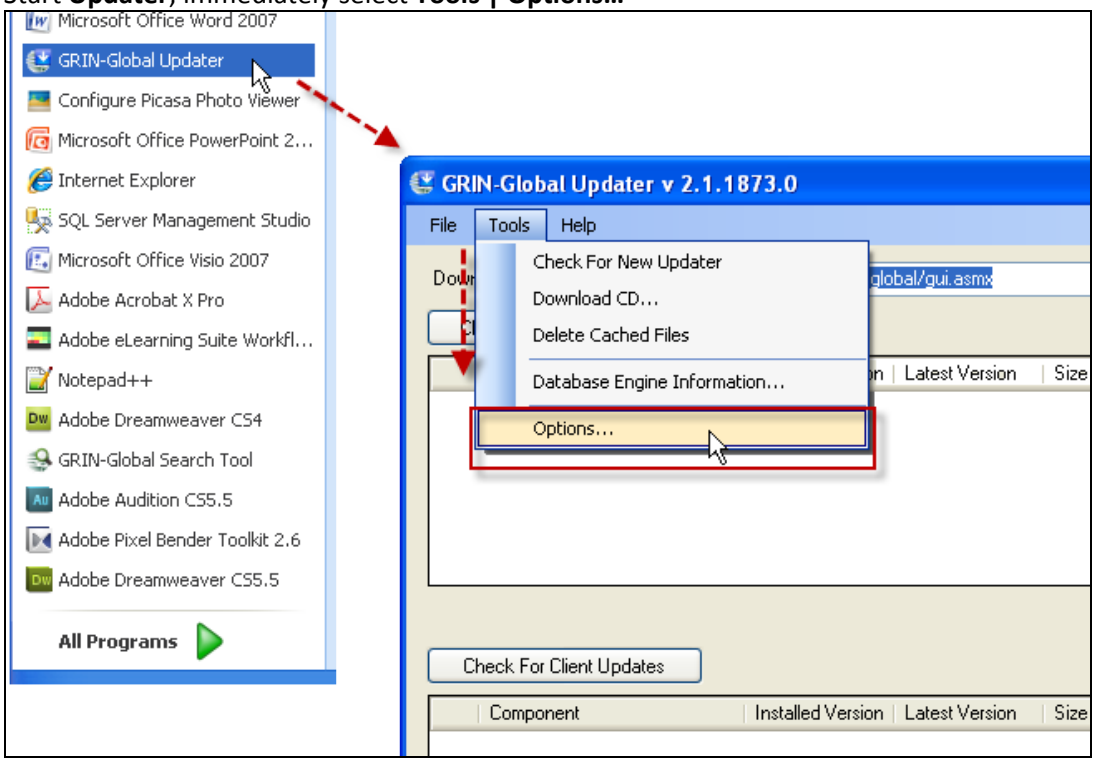
2. The two setup files, the .exe and the .msi files are contained in the zip file. (**GrinGlobal_Updater_Setup.exe** and **GrinGlobal_Updater_Setup.msi**)

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

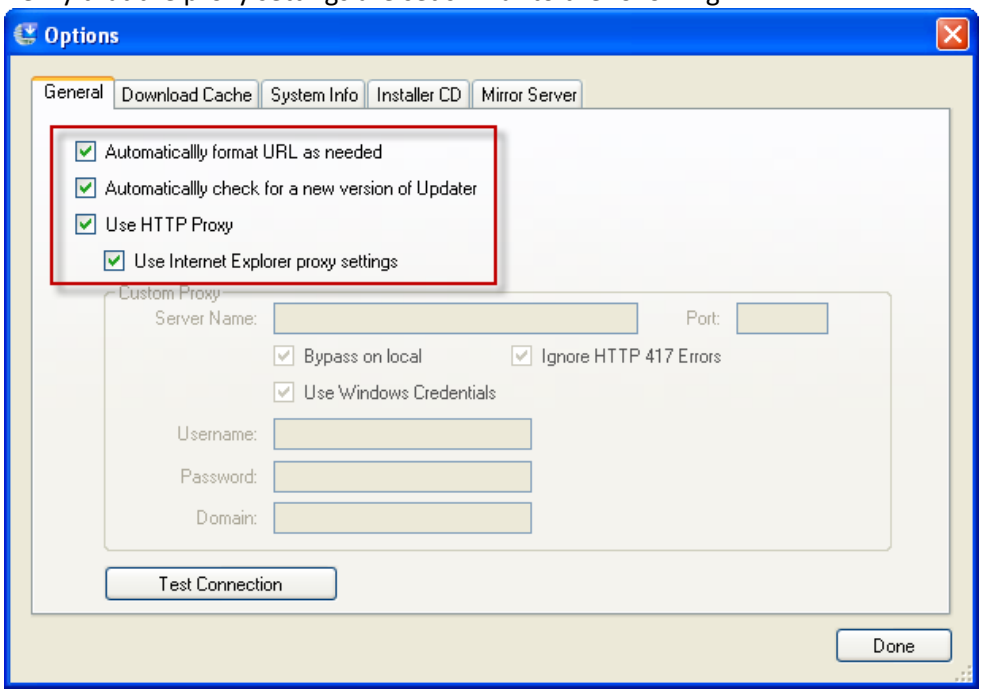
3. Run Grin**Global_Updater_Setup.exe**

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**.

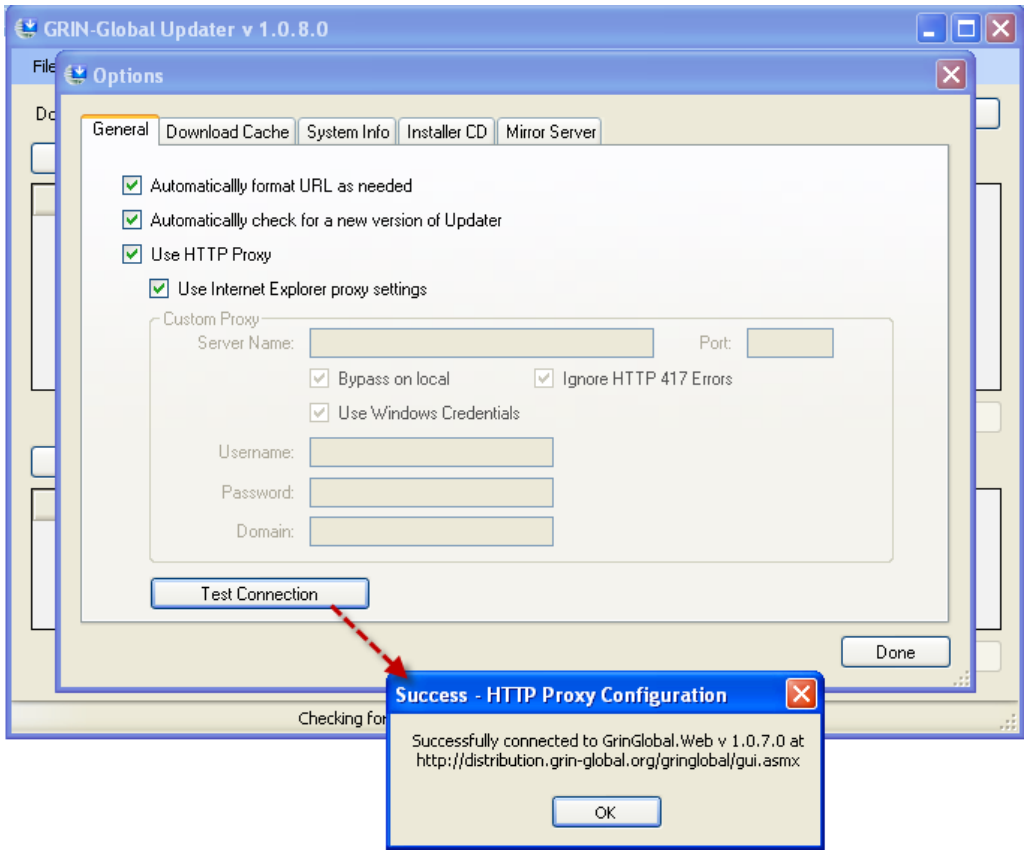
Start **Updater**; immediately select **Tools | Options…**



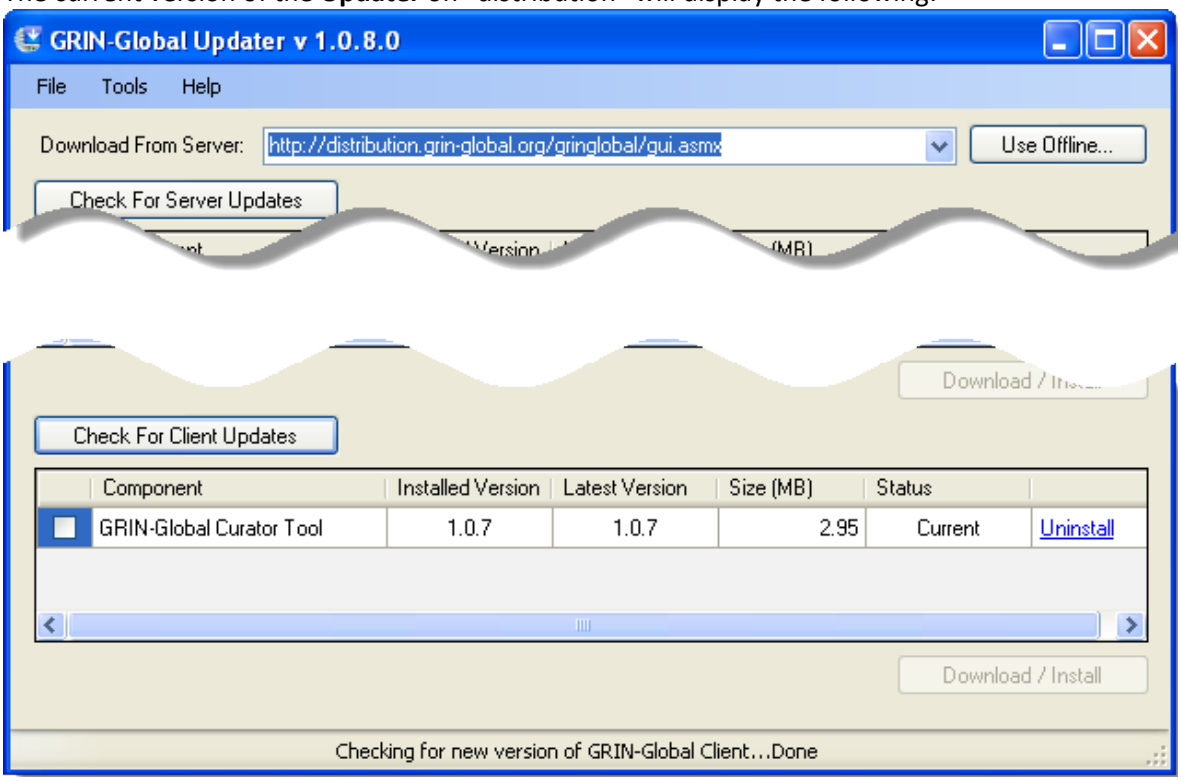

5. Verify that the proxy settings are set similar to the following:



6. Test the connection:



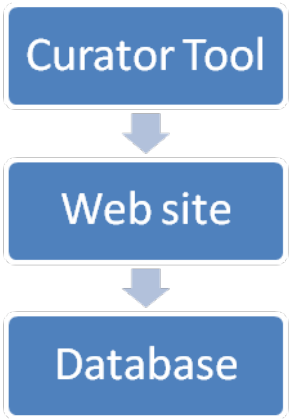
The current version of the **Updater** on “distribution” will display the following:




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.