

Recommended GRIN-Global Procedures - Startup & Ongoing



Revision Date

June 4, 2015

This document is currently divided into two main sections: the first section contains brief overviews to GRIN-Global (GG) elements and links to other supporting documents which will be useful to any organization planning to test or implement GG; the second section focuses on the steps that each site should take prior to implementation. The intended audience for this document is the administrators and users who will be installing GGNPGS for their organization.

The GRIN-Global page: <http://www.grin-global.org/index.php/Training> contains links to many GRIN-Global references, including the guides mentioned in this document. Scroll down that webpage and you will see a section labeled *Reference Guide for Administrators*. Use the links listed there to launch and review the GRIN-Global guides.

USDA NPGS Users: Instead of the link above, use the page [Training Resource Page](#) for your source for documents specific to NPGS needs.

Comments/Suggestions:

Please contact feedback@grin-global.org with any suggestions or questions related to this document. The [Appendix](#) contains this document's revision notes. Review the [Table of Contents](#) which contains links to the document's sections

Table of Contents

Installation Options	4
Install GRIN-Global.....	4
Overview of the Data Required at Start Up	4
Security	5
Import Wizard	5
Taxonomy.....	6
Codes and Code Groups.....	6
Sites and Site Codes.....	8
Cooperators.....	9
Inventory Maintenance Policies	10
Methods.....	11
Inventory Viability Rules	12
Region and Geography.....	12
Users	13
Connect User PCs to the Organization’s Production GRIN-Global Server	13
Crop Descriptors.....	14
Source Habitat Codes.....	14
Passport Data	14
Inventory.....	14
Orders	15
Miscellaneous Admin Functions	15
Languages.....	15
Disclaimer Banner.....	15
Steps for Preparing a User PC to Access GG	17
Determine What PCs Will Connect to the GRIN-Global Server with the Curator Tool.....	17
Determine Who will be the Primary GRIN-Global Site Representative.....	17
Verify Site Users	17
Curator Tool User Name and Password Conventions.....	17
Logging on to the CT.....	17
Ensure That the Server Connections are Set Up Properly	18
Establish Public Website User Accounts.....	19
Ownership: Review.....	19
Permissions: Set	20
Codes: Verify	20
Inventory Maintenance Policies: Verify Your Site’s Policies are in GG	22
Methods.....	23
Train Your Requesters / Point to the New GRIN-Global	24
Update Your Lookup Tables on Day 1.....	24
Appendix: Document Revision Notes	25

– June 4, 2015..... 25
– May 22, 2015..... 25

Installation Options

Install GRIN-Global

Decide if you (or your organization) will be maintaining the GRIN-Global database on a network server, or on a stand-alone PC. The choice you take will determine how you will install GG.

Networked

When installing to a network, you will complete two different installations: you first install the complete suite of software on the server; then on each user PC you install the Curator Tool (CT). (During the installation of the CT, the GG Search Tool (ST) also installs automatically.)

Beginning with version 1.9.2, the Curator Tool is installed via the installer program "InstallShield." The Curator Tool installation file is a self-extracting .exe file. (Self-extracting means that when you open the file (double-click on the file's name, the InstallShield program starts working to unbundle the Curator Tool files and installs them on the PC. (Prior to 1.9.2, the CT was installed via the GRIN-Global Updater program, but that is no longer the case.)



For PCs where an older version of the CT has already been installed, the Curator Tool will first need to be uninstalled via the Updater and then installed via the .exe file.

Stand-Alone PC

If the GG database is to be installed on just a single PC, the entire suite of the GG software must be installed on that PC: the Server software (which uses Microsoft's IIS), the database, and the CT and ST.

Public Website

To set up GRIN-Global for the public, that is, for breeders and researchers who will be ordering germplasm, a public URL will need to be established so that people ordering germplasm can use their browser to point to the GG public website. These external germplasm consumers (external to the genebank organization) do not need any software installed on their PCs; they just need to have internet access to the organization's GG website.

Complete directions for installing GG are detailed in the [GRIN-Global Installation Guide](#).

Overview of the Data Required at Start Up

When an organization is starting with a new, empty GRIN-Global database, it is necessary to populate some of the GG ancillary tables. These supporting tables do not contain the base curatorial data (accessions, inventory, orders, etc.), but rather taxonomy information, codes, and other GG system information.

In any case, either via the Admin Tool or the Curator Tool, the GG administrator will need to populate certain tables with data. What kinds of data? Taxonomy was mentioned above, but other information such as Sites, Cooperators, Region and Geography values, and Inventory Maintenance Policies, etc. must be populated.

Also, some data is automatically installed that is required by GRIN-Global; for example, there are two default users automatically installed with a new system: **Administrator** and **Guest**. A default Site Code (**SYS** for system) is also installed. Do not delete any of these default records.

Security

When GRIN-Global is initially installed, security is enabled by default. Some organizations may desire to permanently disable the security feature, although this is not recommended. However, during the initial installation process, you may decide to *temporarily* disable security in order that records owned by the administrator can be edited and deleted. To disable security, in the AT, in the **Web Application** node, double-click on the **DisableSecurity** parameter and change from the default “False” to “True.”

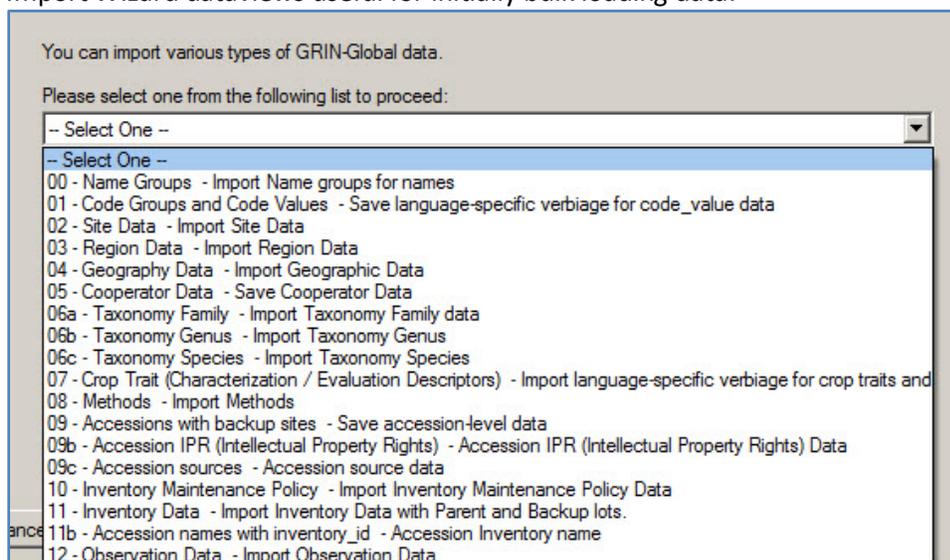
Security (ownership and permissions) is described in detail in two documents – the [Admin Guide](#) and the [Curator Tool User Guide](#). A GRIN-Global administrator should review both of these sections.

Furthermore, users will need to be trained on the various security options available to them. Briefly, every record has one owner; the owner can specify permissions. That is, the owner of the record decides which users may read, update, and delete records that he or she owns.

Import Wizard

You should be aware that there is an Import Wizard in the Admin Tool. The Admin Tool’s Import Wizard is handy for *initially* loading data into a new GRIN-Global system. However, to repeat what has been highlighted in the Import Wizard Guide (“the [Cookbook for Data Importing](#)”), the Wizard has not been updated for some time to keep up with the current schema. That said, it is handy for the initial loading of data. Unfortunately, it is not a perfect solution. For example, it only adds and updates records; the Import Wizard cannot be used to delete records.

In general, when using the Import Wizard, follow the order suggested by the numbered dataviews. The Import Wizard dataviews useful for initially bulk loading data:



Taxonomy

Before inputting an accession (and its passport data), taxonomy information must be in the database (the user selects the accession's taxonomy from a list when entering an accession record). This ensures that the taxonomy is spelled consistently and correctly. Taxonomy is just one example of requisite data.



Downloading Taxonomy and Geography data is optional when installing GG. The Taxonomic data is the same data used by the U.S. National Plant Germplasm System (NPSGS) GRIN/GRIN-Global systems. (Complete directions for downloading the taxonomy and geography data are detailed in the *Installation Guide*.)

By installing the NPGS taxonomy tables, an organization is not restricted to using this taxonomy “as is” – an organization can remove any taxonomy data from the tables and add their own taxonomy as needed. If a genebank's collection spans many species, we recommend that the organization initially load the default taxonomy data, and then add any additional taxonomic data required by the organization that is not already included in the GRIN data. At the same time, if the organization is confident that certain taxonomy will never be used, the organization's GG administrator can remove those taxonomy records.

Alternatively, if an organization's GG database will focus on just a few taxa, it may be beneficial to only include those in their GG database. However, leaving the default taxonomy in the system does not impact performance. The only negative aspect is that a user would see taxonomy displayed in dropdowns that are not pertinent to the organization and the user could mistakenly select taxonomy that wasn't applicable.

Complete directions for downloading the **Taxonomy** data are in the Installation Guide, but the basic idea is for the administrator to hold the **Ctrl + Shift** keys *before clicking* the **Download/Install** button when using the GG Updater program to install the server components.

When inputting a new Taxonomy Species record, be sure that it has its requisite Genus and Family records. Conversely, if you are going to delete any Taxonomy Family records, you must first delete any children Species and then Genus records that relate to that Family.

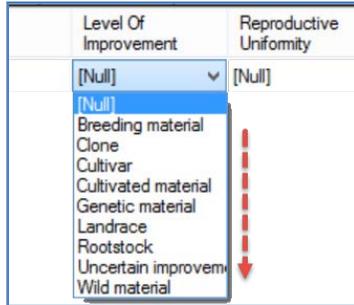
Codes and Code Groups

Many codes are used throughout the GG system; during the installation, a default set of Code Groups and their codes are installed. An organization new to GG should review the codes and edit, add, or delete them in order to match the organization's specific needs *before* adding accessions, inventory, and germplasm orders.

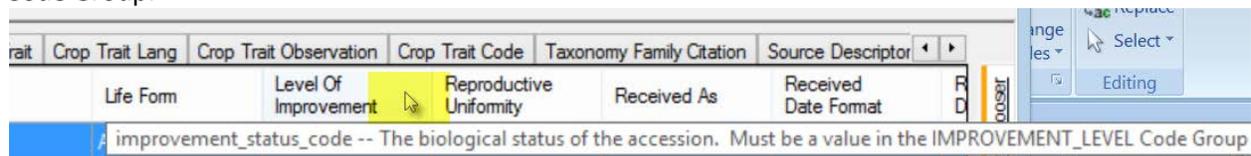


It is simpler to delete the codes during installation rather than later. As curatorial data gets added to the database, records will be created using the codes in these fields.

In the Curator Tool, Code groups are easily recognizable – when editing a record, a dropdown displays choices (the codes – the possible values for that field) when clicked:



Also, when you position the mouse over the heading, the rollover tooltip will indicate the respective Code Group:



Code editing is generally done manually within the GG Admin Tool.



As an alternative to using the AT Code editor, when initially reviewing /editing the codes installed with GG, you can use the Curator Tool's **Get Code Value** and **Get Code Value Language** dataviews. An advantage with using the CT is you can edit multiple records at the same time (and use "drag and drop" to move back and forth from a spreadsheet).



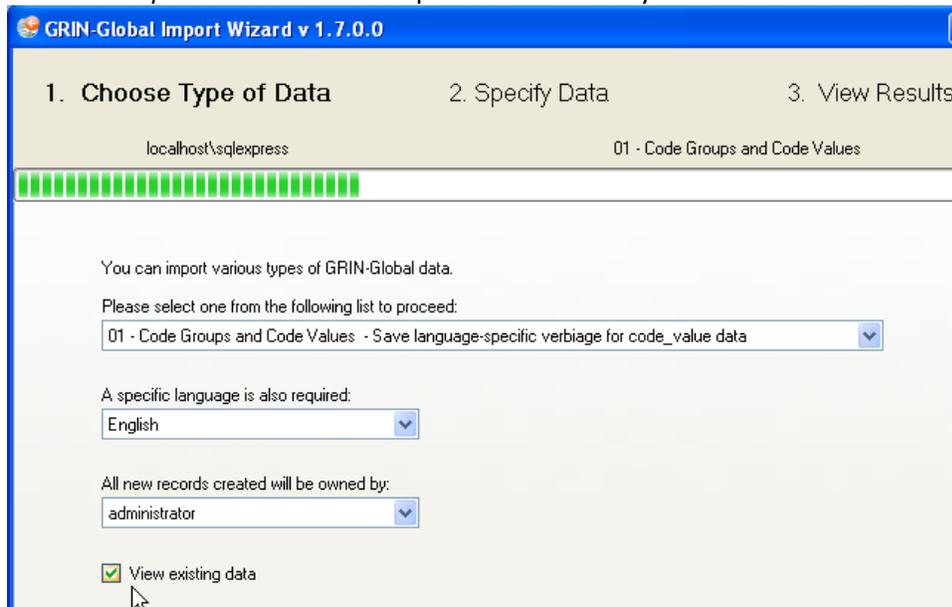
By design, the **Get Code Value** and **Get Code Value Language** dataviews are read-only. In order to edit the records in the CT, use the Admin Tool to change the read-only attribute. In the AT, open the dataviews, switch to the **Properties** tab, temporarily *uncheck* the **Is Read Only** checkbox. In the **Fields** tab, uncheck the fields that will be edited. For example, in the **Get Code Value** dataview, you will want to edit the **group_name** and **value** fields.

When deleting codes, delete the children **Get Code Value Language** records first, before deleting the corresponding **Get Code Value** records.

Remember to reset the **Read Only** properties when you have completed the code editing!

There are many **Code Groups** and codes used throughout the GRIN-Global system. An organization is not restricted to using these codes. Before any accession data is entered into the system, the GG administrator should review these codes and consider deleting codes the organization will never use and adding additional codes matching the organization's need. However, do not remove any of the *Code Groups*. (There are a few Code Groups that can be removed since they are specific to NPGS site inventory dataviews, but there is no compelling reason to delete them. If the NPGS specific dataviews are never used, the user will never see these groups.)

In the *Recommended Order for Importing Data* section in the *Overview* of the [Import Wizard Cookbook](#), there is a table listing the important ancillary data that can be loaded via the Import Wizard in the Admin Tool. (This data could also be brought into GG via the Curator Tool, but this Import Wizard was designed to make an initial dump of data into an organization's new database.) You can use the Import Wizard to *export* the codes into a spreadsheet where you can review them as a whole.



Codes cannot be deleted via the Import Wizard; the simplest way to delete a code is to use the Admin Tool's Code Group editor.

The online data dictionary has a sheet where many of the NPGS codes are described: [Codes](#). Review this to get a sense of how the codes are used. GG administrators should also read and review the detailed "Codes" section in the Admin Tool Guide.



The Geographic data uses ISO country codes and administrative type codes. These codes can be used as is, or additional codes can be added by the organization as needed.

Sites and Site Codes

(Site Codes are a different kind of code as compared to the Codes described in the [Codes and Code Groups](#) section.). An organization using GRIN-Global can establish Site Codes for various reasons. The sites may be separate physical locations such as in the U.S., where "COR" is the site code for the

Corvallis, Oregon genebank and “W6” is the code for the Western Regional Plant Introduction Station in Pullman, Washington.

A site code could be set up as the (virtual) site for special purposes, for example the “black box” storage of certain collections that are not routinely distributed.

A site could also be set up for a specific crop or even for specific germplasm types. For example, if your genebank has two sets of procedures that vary, depending on the germplasm type, such as In-vitro and seeds, it may be helpful to create one site for the in-vitro, and the second for seeds.

Sites Example:

Site ID	Site Short Name	Site Long Name	Organization Abbreviation	Is Internal?	Is Distribution Site?	Type	FAO Institute Number
2	BRW	Natl. Germplasm Repository - Brownwood	BRW	Y	Y	Clonal maintenance site	USA133
30	CLO	Clover collection	CLO	Y	Y	Seed maintenance site	USA134
3	COR	Natl. Germplasm Repository - Corvallis	COR	Y	Y	Seed and clonal maintenance site	USA026
1	COT	Cotton Collection	COT	Y	Y	Seed maintenance site	USA049
4	DAV	Natl. Germplasm Repository - Davis	DAV	Y	Y	Clonal maintenance site	USA028
10	DBMU	Database Management Unit	DBMU	Y	N	Seed maintenance site	USA126
33	DLEG	Desert Legume Program	DLEG	Y	Y	Seed maintenance site	USA971

Cooperators



A person or an institution can be considered a cooperator. This means that people and organizations are stored in the same table. When creating a new cooperator, either the **Last Name** or the **Organization** field must be specified. An institution cooperator record will have a null **Last Name** field. Each cooperator must have a unique index comprised of **Last Name**, **First Name**, **Organization**, **Geography_ID**, and **Address Line 1** fields.

When an organization installs Taxonomy with GG, approximately 30 related cooperator records are also loaded – otherwise, just five essential “SYSTEM” type cooperator records will be installed. (The system cooperator records are required by the software.)

We recommend using the Curator Tool’s **Cooperator Wizard** to search for (people) cooperators before adding any new ones. When adding many cooperators at one time, especially during the initial GG organizational setup, use the **Cooperator** dataview to drag multiple new cooperator records from a spreadsheet.



Every Curator Tool user will be added to the Cooperator table. See the [Users](#) section for more details.

Cooperator Wizard

Cooperator ID	Status	Last Name	Title	First Name	Job	Organization Abbreviation	Organization Name
---------------	--------	-----------	-------	------------	-----	---------------------------	-------------------

Cooperator Dataview

Cooperator ID	Status	Last Name	Title	First Name	Job	Organization Abbreviation	Organization Name
-1	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]	[Null]

Inventory Maintenance Policies

GRIN-Global is installed with one default inventory maintenance policy: “**SYSTEM.**”

GG users at a site (location) can create inventory maintenance policies to determine how inventory lots will be processed. These policies specify the standard germplasm form to be distributed, the standard amount to be distributed, and the setting of critical distribution and replenishment levels.

The only inventory maintenance policy installed with GG is **SYSTEM.** Before adding any inventory records, someone, either a Curator, a user at a site, or the GG administrator, will need to input (or copy from a spreadsheet) any desired inventory maintenance policies.

Review the **Inventory Maintenance Policy** section in the online GRIN-Global Inventory document that describes in detail how to create inventory policies.



Every new inventory record requires its **Inventory Maintenance Policy** field to be filled. This field is doubly important, because the owner of the policy record becomes the owner of the inventory record. In creating these policies, ensure that the policy record owner is the person who is intended to be the owner of the inventory records created when using that policy. For example, if “John Doe” (Juan Coneja?) will ultimately become the inventory record owner, than create an inventory maintenance policy where he is the owner of the policy. If you are signed on as administrator and have created these policies, you can transfer ownership to the respective cooperators.



The Import Wizard in the Admin Tool has a dataview for the bulk addition of **Inventory Maintenance Policies** into the GG database.

Methods

The Method dataview accesses the table of methods and procedures used to determine the crop specific attributes of the germplasm. Each environment used in an evaluation should have its own record in the method table. Other procedures can also be included in this method table (e.g. germination procedures).

In many dataviews, the **Method** field may be optional, but it is a required field when recording **Crop Trait Observation** records. Therefore, before any observations can be recorded, the pertinent methods must first be defined.

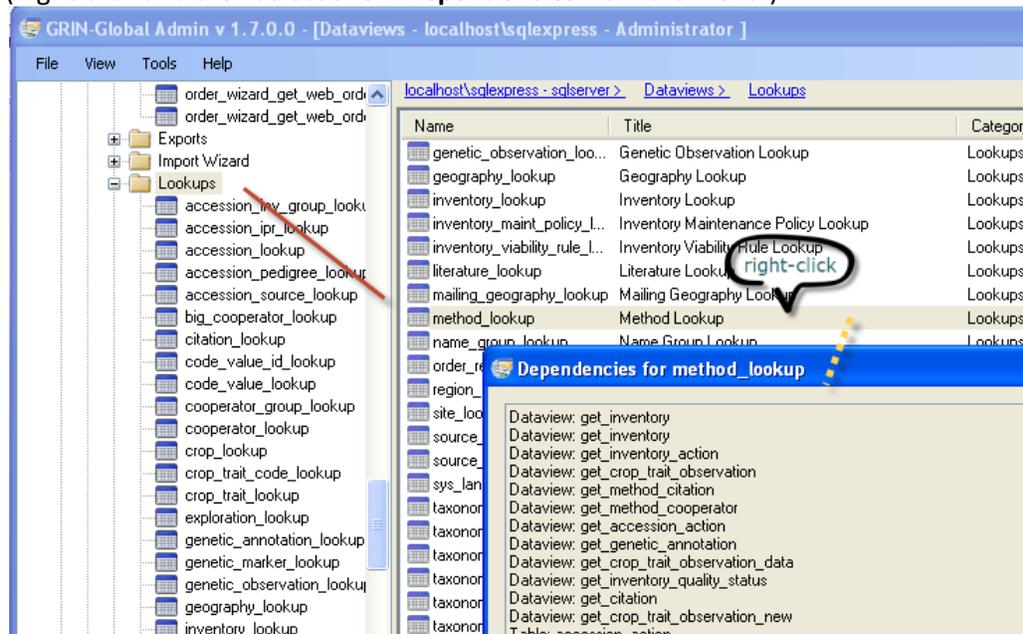
When creating method records, only one field is required – the method’s **Name** field. Other fields are available for storing the method’s specifics and the environment where it was conducted. In the naming convention used by some NPGS sites, the **Name** includes the year of the trial, as shown below:



Method ID	Name	Geography	Elevation (meters)	Latitude	Longitude	Material or Method Used	Uncertainty
125	SUNFLOWER.ND.RUST.R4.93	United States, North Dakota				Fifteen plants (three replicates of five plants) were inoculated with race 4 rust spores mixed with Soltrol 160 mineral oil. Plants	
126	SUNFLOWER.ND.RUST.R3.93	United States, North Dakota				Fifteen plants (three replicates of five plants)	
135	SUNFLOWER.SUN.FATTYACID.91	United States, Minnesota				Accessions were first screened using a	
137	SUNFLOWER.TUR.ORDBANCHE.93	Turkey, Edirne				903 Helianthus accessions were screened	
146001	SUNFLOWER.ND&K.INSECT.BSM.87	United States, North Dakota				Study Name: Sunflower Resistance to North	

Methods are used in at least twelve dataviews such as **Inventory**, **Inventory Action**, **Crop Trait Observation**, etc. For example, in the Inventory dataview, two different fields are completed by selecting a method: **Preservation Method** and the **Regeneration Method** fields.

In the Admin Tool an administrator can display what dataviews use the method_lookup dataview. (Right-click and then select **Show Dependencies** from the menu.)



Inventory Viability Rules

The germination evaluation methods are stored in the **inventory_viability_rule** table. (This is a change for the NPGS – in GRIN germination evaluation methods were stored in the Method table.) Therefore, in the Curator Tool, use the **inventory_viability_rule** dataview to store the germination evaluation protocols.

When recording an inventory viability record, there is a field to select from the list of Inventory Viability Rules (this field is not required).

Region and Geography

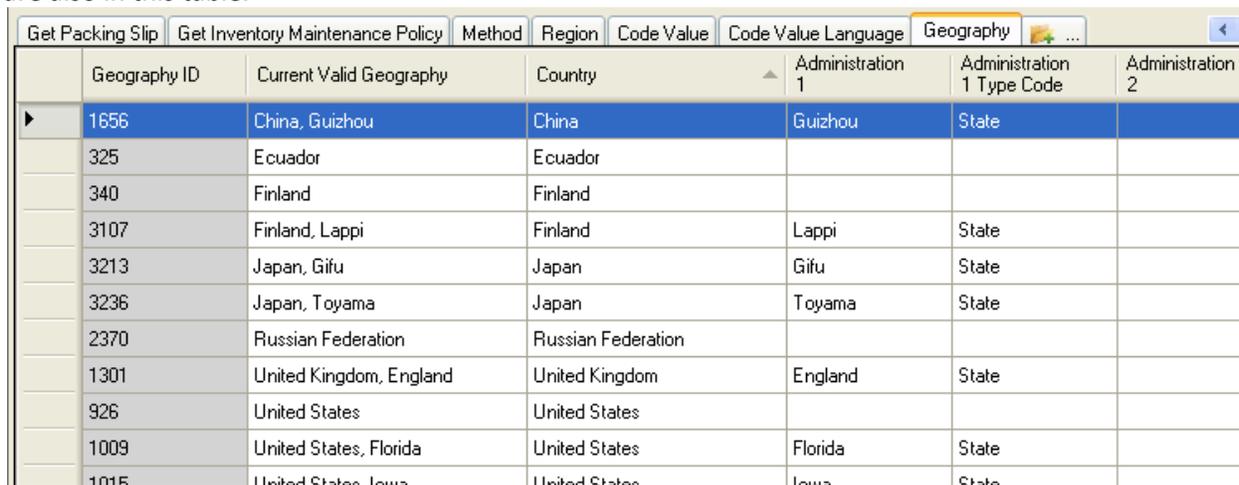
The Region and Geography tables are used by many dataviews. Default geography data can be downloaded during installation. Complete directions for downloading both the **Taxonomy** and **Geography** data are in the Installation Guide, but the basic idea is for the administrator to hold the **Ctrl + Shift** keys *before clicking* the **Download/Install** button when using the GG Updater program to install the server components.

Region

The **Region** dataview accesses the **Region** table, which includes world regions and continent information. The region table is used by the **geography_map** table to group countries into regions. The main fields are continent and sub-continent names and abbreviations. The [Import Wizard Cookbook](#) describes a method for quickly importing region data via the Admin Tool Import Wizard, but it is also possible to simply add and edit data in the **Region** dataview.

Geography

This dataview accesses the table of countries and their political subdivisions. Former names of countries are also in this table.



Geography ID	Current Valid Geography	Country	Administration 1	Administration 1 Type Code	Administration 2
1856	China, Guizhou	China	Guizhou	State	
325	Ecuador	Ecuador			
340	Finland	Finland			
3107	Finland, Lappi	Finland	Lappi	State	
3213	Japan, Gifu	Japan	Gifu	State	
3236	Japan, Toyama	Japan	Toyama	State	
2370	Russian Federation	Russian Federation			
1301	United Kingdom, England	United Kingdom	England	State	
926	United States	United States			
1009	United States, Florida	United States	Florida	State	
1015	United States, Iowa	United States	Iowa	State	

GG has a code group, **GEOGRAPHY_COUNTRY_CODE**, which contains three letter codes. The numbers are for countries that do not have an ISO code (historical areas no longer existing). The ISO codes are three-letter codes.

Users

“Setting up users” here is referring to creating Curator Tool user accounts. In some organizations, an administrator may also be creating a few additional administrator accounts as well. Use the Admin Tool to create/modify Curator Tool user accounts.

At a minimum, when adding a new CT user, establish/select the following:

- User Name and Password
- Geography and Site codes
- Enabled (checkbox – denotes the user will be a CT user)
- Active (checkbox – indicates the user will be an active cooperator)
- Groups: CT Users

Some organizations may have multiple sites, whereas others may establish just one site – even if the personnel are physically located in remote sites. In the U.S., each genebank location has its own unique site code. (Refer to the [Sites and Site Codes](#) section for more details.)



Users accessing the Public Website (PW) do not need the GG administrator to do anything. Any user with a browser can access the organization’s GRIN-Global PW. This assumes that the URL is a publicly available URL. A user can browse the GG Public Website, self-enroll, and create a PW user account similar to the way many websites operate. However, a staff person internal to the organization can have their PW account connected to their Curator Tool (CT) account by the GG administrator ([explained below](#)). (The GG administrator manually will use the Admin Tool to manually connect the two accounts.)

Connect User PCs to the Organization’s Production GRIN-Global Server

Curator Tool

The Curator Tool (CT) application must be installed on all PCs which will be used to access the GRIN-Global database. Administrators should read and follow the complete CT installation directions that are in the separate [GRIN-Global Installation Guide](#).

Check that each user can login successfully. Ideally the administrator will test the user’s **Username** and **Password** and the GG server address on the PC being used to access GRIN-Global.

Public Website

Users access the Public Website via a browser. Ensure that each genebank user knows the correct URL for the Public Website. Other than a browser, no additional software is needed to use a GG Public Website.

The user’s account for the Public Website is for the Public Website only. It is not the same account as the Curator Tool user account. In the PW, a user can self-register and create her own account, or the administrator can create the PW account for her.

Connecting the CT and PW Accounts

The GG database administrator can then connect the two accounts via the Admin Tool. All CT user accounts must be made and edited by the GG administrator. In some organizations, where the user

creates her own PW account, the GG admin may wait until later to relate the PW account to the user's CT account.

Crop Descriptors

Before observations can be recorded in GG, the traits must be described and any associated trait codes must also be defined. Also, the Taxonomy Crop Map records must be established to relate taxonomic species records to crops. A complete document explains how to set up descriptors, codes, and observations: http://www.ars-grin.gov/npgs/gringlobal/docs/gg_observations_and_descriptors.pdf

Source Habitat Codes

Five GRIN-Global tables provide an extremely flexible method for adding details about the collection site; genebank personnel can create custom descriptors and codes for an unlimited amount of detail on the collection site. Possible Source/Habitat descriptors that an organization could record with these descriptors include: Slope, Aspect, Soil pH, and Soil Texture. Details may be found at: http://www.ars-grin.gov/npgs/gringlobal/docs/gg_source_habitat_descriptors.pdf

Passport Data

The list of multi-crop passport descriptors (MCPD), is developed jointly by IPGRI and FAO to provide international standards to facilitate germplasm passport information exchange. In GRIN-Global, the multicrop passport descriptors (MCPD) data, and other data, is distributed across multiple accession tables that are linked to each other.

Complete information about passport data is in the document:

http://www.ars-grin.gov/npgs/gringlobal/docs/accessions_and_passport_data.pdf

The main Accession records need to be added before any auxiliary child records are added. After the primary accession records have been added to the database, the adding of the remaining passport data can be addressed. The Curator Toll has an "Accession Wizard" which expedites the inputting of the supplementary at a for one accession at a time, or a user can bulk add data using the CT's drag-and-drop method for adding data.

Inventory

One general guideline to remember is that inventory must be tied to an accession. Complete information about managing inventory data is in the document:

http://www.ars-grin.gov/npgs/gringlobal/docs/gg_inventory.pdf

Orders

Complete information about the Order Wizard and order processing is in the document:
http://www.ars-grin.gov/npgs/gringlobal/docs/gg_inventory.pdf

For most new GG installations, order records will typically be new records generated within GRIN-Global after the system is up and running. However, an organization could bulk load orders from some other system by using the Curator Tool's drag-and-drop method.

Miscellaneous Admin Functions

GG was designed to be easily customized; some of this configuration is done by the administrator within the Admin Tool. Refer to the Admin Tool Guide and review the main sections. For example, you should review the **Web Application** section.

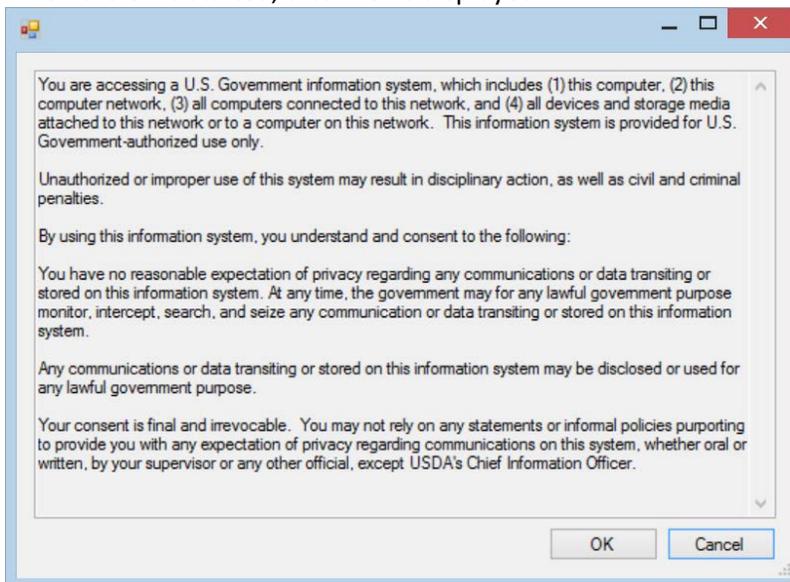
[Admin Tool Guide](#)

Languages

A separate document online, [GRIN-Global Language Guide](#), describes the many options an organization has with respect to implementing GRIN-Global in languages besides the default English.

Disclaimer Banner

When the CT is started, a banner is displayed:



Obviously the example illustrates the U.S. version. This text is stored in a field in the **get_app_setting** file: "**GrinGlobalClient_loginBanner.**" The value for this record can be edited to whatever appropriate

message your organization desires. The GG administrator must do this; this is not an end-user setting. Contact your GG administrator. (To edit the text within the CT, in the Admin Tool you must change the dataview's Category to "**Client.**")

Steps for Preparing a User PC to Access GG

Each PC that will be running the Curator Tool needs to complete several steps in order to implement GRIN-Global. The directions below summarize these steps.

Determine What PCs Will Connect to the GRIN-Global Server with the Curator Tool

We recommend PCs running the GRIN-Global Curator Tool to use either Windows 7 or 8.1. PCs accessing the GG Public Website simply need a relatively current browser.

The GG administrator needs to know and indicate the GRIN-Global database server's address.

Determine Who will be the Primary GRIN-Global Site Representative

Identify someone from each site who will be verifying that the GRIN-Global setup has been done properly.

Verify Site Users

The site's primary GG person should install the GRIN-Global Curator Tool on at least one PC. Refer to the [NPGS Installation Guide](#) for complete directions.

Log in to the Curator Tool and review the names listed in the "Show lists from:" drop down. This list should include all of the site personnel who will be using GRIN-Global. The GRIN-Global database administrator sets up each user account and indicates the site code for each user.

Curator Tool User Name and Password Conventions

Beginning with CT version 1.9.4, the user name is the user's email address.

Passwords*

Passwords must follow the current ARS guidelines:

- 12 characters minimum
- at least one of each are required: upper case, lower case, digit, and special character (virtually any special character is valid)
- passwords can change only once per day
- five failed logins initiates a temporary lockout for 15 minutes

If a password is forgotten or hasn't been used for some time, the GG administrator must be contacted (to create a new one).

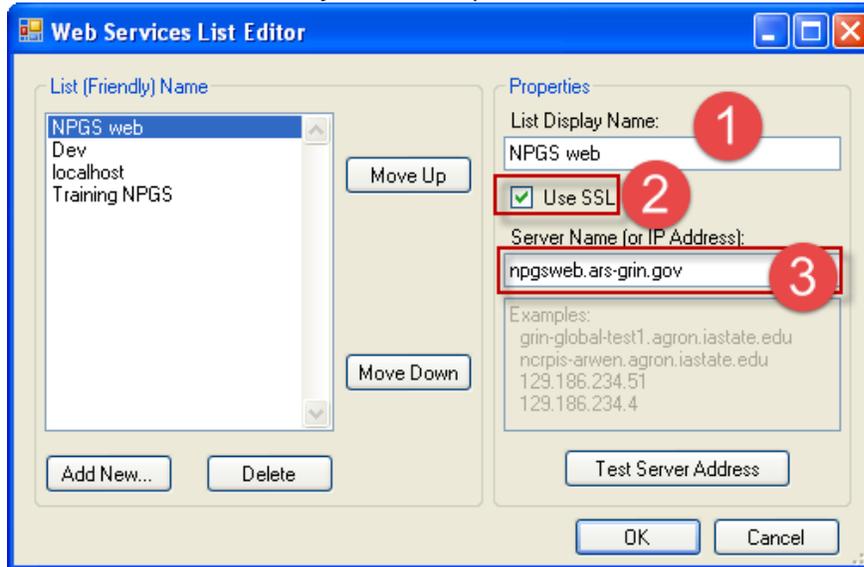
* This is the default used at the USDA. The defaults may be changed, using the **SysUserPasswordxxx** parameters which can be edited via the AT, under the **Web Application** node.

Logging on to the CT

Ensure That the Server Connections are Set Up Properly

Curator Tool

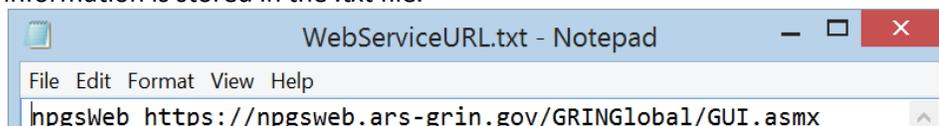
The Curator Tool is the application program that is used by genebank personnel to edit and input GRIN-Global data. Each user at a genebank site will be using the Curator Tool to access GG data. Every genebank PC that will be running the Curator Tool will need to have a copy of the CT installed on the PC. The names used below are just an example – each institute will determine their own Server Names, etc.



Beginning with version 1.9.2, the Curator Tool uses its own installer (InstallShield) in a self-extracting .exe file. Prior to 1.9.2, the CT was installed via the GRIN-Global Updater program, but that is no longer the case. For PCs where an older version of the CT has already been installed, the Curator Tool will need to be uninstalled via the Updater and then installed via the .exe file. Refer to the [NPGS Installation Guide](#) for complete directions.



A text file (**WebServiceURL.txt**) exists on any computer where the CT has been properly installed. It is found in the **C:\Users\username\AppData\Roaming\GRIN-Global\Curator Tool** path. If an administrator for a site is setting up multiple computers with the CT, the administrator can copy a valid **WebServiceURL.txt** from one computer to another. This eliminates the need to manually setup the server information on each computer since that information is stored in the .txt file.



Public Website

Users in the genebank will also need to know where to point their browser (Internet Explorer, Firefox, Chrome, etc.) to view GRIN-Global data on the Public Website (PW). Provide the URL: <http://npgsweb.ars-grin.gov/gringlobal/search.aspx?> (example only)

Suggest that each user bookmark this URL for future reference.

Note that the PW is the interface your germplasm requestors will be using to review and order GG germplasm data. Provide the GG URL to your user community in your communications and website.

We recommend that you review a sample of your accession data to confirm that the data was transferred properly.

Establish Public Website User Accounts

The public will use the GRIN-Global Public Website for reviewing and ordering germplasm. However, genebank personnel will also find the Public Website useful and complementary to the Curator Tool.

There are two main features embedded in the PW that are only available to users with accounts and whose accounts have been given access to these features. The general public will not have access to the **Tools** option on the PW menu bar, nor will they have access to reports designed specifically for NPGS-use only. The GG database administrator can associate an organization's internal user account with these features.

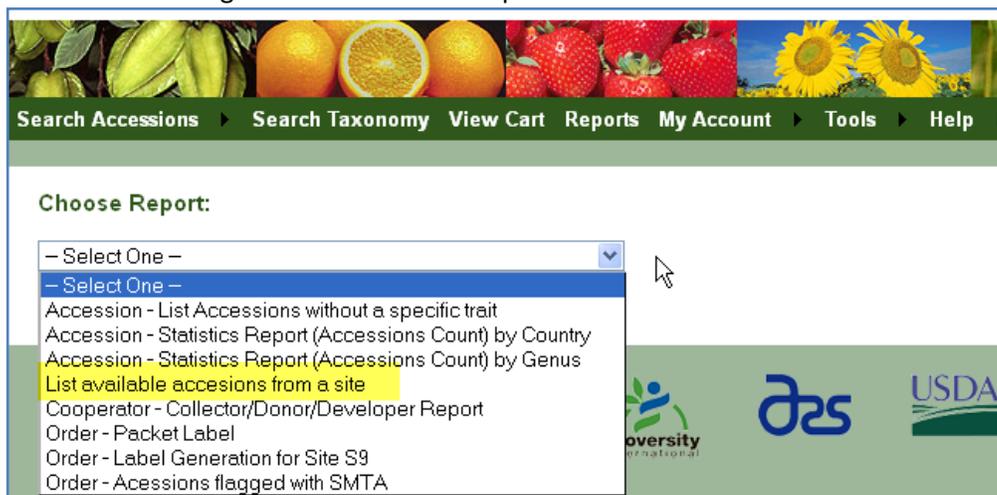
The two features available are:

- **Tools | Web Query**

SQL queries can be run against the GG database. There is a growing library of SQL examples available online on the [NPGS Training Resource page](#).

- **Additional Reports**

Under the Reports menu option, a list of reports is available. This list is still developing, but in the example below, the highlighted report is currently the only list available to the general public, all of the others lists are only available too users who have signed in and whose user account has been given access to these reports.



Ownership: Review

Accession “owners” need to evaluate and determine who the record owners should be and what permissions need to be assigned to other site genebank personnel. CT users should refer to the Security section in the Curator Tool User Guide.

In GRIN-Global, an individual owns each data record and can determine what access other individuals can have. “Owner” in this context is the person in GG who can allocate permissions to other individuals. A site may consider the curator as the actual owner of certain accessions, but prefer designating some other employee (e.g. the site primary technician) as the “owner” within GG since that person will be using GRIN-Global on a daily basis.



There is only one owner per record.

In GRIN-Global it is relatively simple to transfer ownership so that record ownership should not be an issue. However, upon conversion, we recommend that each site review sample records to verify that the ownership rights set up during the conversion to GG are what is expected and what the site needs in order to complete their daily procedures. If records have an incorrect owner, then change the ownership to the correct owner or desired owner. One way can be done by contacting the incorrect owner and asking them to transfer ownership to the correct person. Another is to initially disable security and have the GG admin review and change ownership as needed. Refer to the *Security (Ownership & Permissions)* section in the [Curator Tool User Guide](#) for complete directions.

Permissions: Set

Although there can only be one *owner* per record, the owner of a GRIN-Global record can assign permissions to other individuals. Permissions establish who can read, update, create, or delete records. With this flexibility, there are various ways to set up permissions to meet the genebank’s needs. For example, you may have the situation where a student or technician will be uploading observation data or creating action records on an inventory, but they should not be altering the inventory data. Hence they can create new observation or action data, but not update or delete inventory records.

One note about permissions: Just because you may have created the record does not imply that you are automatically the owner of the record. For example, when creating an inventory record, one of the required fields is **Inventory Maintenance Policy**. The Inventory Maintenance Policy that is selected determines who the owner is. So in this case, the creator of the inventory record may, or may not be the owner of the inventory record, depending on the policy associated with that inventory record.

Establishing permissions for the site’s accessions, inventory, and order records should be completed after record ownership has been verified. Refer to the *Security (Ownership & Permissions)* section in the Curator Tool User Guide for complete directions.

Codes: Verify

Codes are used throughout the GRIN-Global system to ensure data integrity and avoid typographical errors. The Codes are added and maintained by the GRIN-Global administrator. When you use the Curator Tool, contact the GG administrator if any codes need to be added or edited. The Codes list in dropdowns when editing or adding records.

In Edit mode, dropdowns using the Code Groups are visibly recognized – they initially display **[Null]**:

Inventory Quality Status ID	Inventory	Test Type	Contaminant	Plant Part Tested	Test Result	Test Results Score	Test Results Score Type
-1		[Null]	[Null]	[Null]	[Null]		[Null]

Click in the cell, and then click again to display the dropdown menu:

Inventory Quality Status ID	Inventory	Test Type	Contaminant	Plant Part Tested	Test Result	Test Results Score	Test Results Score Type
-1		[Null]	Downy Mildew	[Null]	[Null]		[Null]

In this example, in the **Inventory** dataview, the **Availability Status** field is using codes:

Is Auto Deducted?	Is Available?	Availability Status	Status Note
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Available	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Available	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Available	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Available	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Available	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Available	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Available	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Available	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Available	
<input type="checkbox"/>	<input type="checkbox"/>	Available	

SQL Query for Listing GG Code Groups and Codes

Using the [SQL Query option](#) described earlier, it is possible to list all of the code groups and codes in the system.

```
USE
  gringlobal;
SELECT
  cv.code_value_id as value_id,
  cv.group_name as group_name,
  cv.value as gg_value,
  cvl.title as cvl_title
FROM
  code_value cv
  inner join code_value_lang cvl
    on cv.code_value_id = cvl.code_value_id
  left join sys_lang sl2
    on cvl.sys_lang_id = sl2.sys_lang_id
WHERE
  sl2.sys_lang_id = 1
/* and group_name = 'inventory_action' */
/* use and clause to search for a specific code */
ORDER BY
  group_name,
  gg_value
```

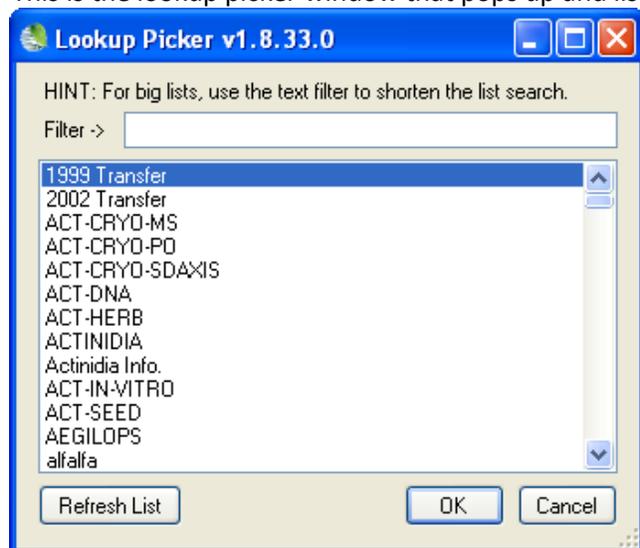
Inventory Maintenance Policies: Verify Your Site's Policies are in GG

In dataviews, when editing or adding data, some fields use a “Lookup Picker” to select data from other tables. This is different then when fields use Codes, since codes are displayed in dropdowns. Data displayed in a lookup picker window is data that has been entered into GG by users and is stored in the GG database.

The following illustrates a field using a Lookup Picker to supply its data – in this example, the **Inventory Maintenance Policy** is highlighted:

	Inventory	Inventory Action	Accession Source	Cooperators	Get Order Request Action	Accession Inventory Attach	Order Req
D	Inventory Prefix	Inventory Number	Inventory Suffix	Inventory Type	Accession	Inventory Maintenance Policy	
	PI	650347	85ncai01	SD	PI 650347	NC7-sun.cults	M
	PI	597890	91ncai01	SD	PI 597890	NC7-sun.wilds.ann	M
	PI	597891	91ncai01	SD	PI 597891	NC7-sun.wilds.ann	M
	PI	597892	91ncai01	SD	PI 597892	NC7-sun.wilds.ann	M
	PI	597893	91ncai01	SD	PI 597893	NC7-sun.wilds.ann	M
	PI	650346	94ncai01	SD	PI 650346	NC7-sun.cults	M
	PI	435094	01i	SD	PI 435094	cucu_parl	F
	PI	435094	10i	SD	PI 435094	cucu_parl	F
	Mar	1	rei	CT	Q 48487	APPLE	F

This is the lookup picker window that pops up and lists the available **Inventory Maintenance Policies**:



Since sites are responsible for creating their own **Inventory Maintenance Policies**, if they need to add one they must create an inventory maintenance policy record. Refer to the instructions for Managing Inventory (this [Inventory document](#) is the GG wiki).

Methods

The Methods dataview uses the table of methods and procedures which are used to determine the crop specific attributes of the germplasm. Each environment used in an evaluation should have its own record. The method is primarily used for crop trait evaluations. (For additional background information on methods, refer to the [Create Methods](#) section in this document.)



In GG we moved the germination evaluation methods into the `inventory_viability_rule` table. Instead of the method dataview, use the `inventory_viability_rule` table for germination evaluation protocols.

Raw data can be stored in the `inventory_viability_data` table, but currently there are no wizards to roll up this raw data into the `inventory_viability` table.

You should search for your site's methods to ensure that the methods you will be using in making future observations are in place in GRIN-Global. A simple search in the ST or Dynamic Query in the CT will produce a list of methods records – you can then display them in the CT or drag them into a spreadsheet for further review.

Example:

Method ID	Name	Geography	Elevation (meters)	Latitude
175	ALFALFA.ROOTCURC.94.BYERS	USA, Pennsylvania		
176	ALFALFA.POTLEAFHOP.94.BYERS	USA, Pennsylvania		
177	ALFALFA.SCLEROT.94.RHODES	USA, Ohio		
195	ALFALFA.ACIDSOIL.94.BOUTON	USA, Georgia		
223	ALFALFA.SEEDWGT.WRPIS	USA, Washington		
224	ALFALFA.CHROMNUM.95.BAUCHAN	USA, Maryland		

Sample Dynamic Folder criteria for displaying a site's Methods:

Dynamic List Options

Resolve To:

- Default
- Accession
- Inventory
- Order Request
- Cooperator

Dynamic Folder Search Criteria:

```
@method.method_id > 0
AND
@site.site_short_name = 'W6'
AND
@method.name LIKE 'ALFALFA%'
```

```
@method.method_id > 0
AND
@site.site_short_name = 'W6'
AND
@method.name LIKE 'ALFALFA%'
```

Train Your Requesters / Point to the New GRIN-Global

If you use newsletters or other means to regularly communicate with your users, please include a notice about the switch to GRIN-Global. Remind them that there is a Help file in the Public Website.

Update Your Lookup Tables on Day 1

When the GRIN-Global database is brought over “live,” users will need to update their PC’s lookup tables. If you think about this, it is necessary because there is an entirely new database –users who have been testing have lookup tables pointing to the test database records.

This is one time when you should use the **Load All** button. Going forward, you should not need to update all of the lookup tables at one time.

Appendix: Document Revision Notes

– June 4, 2015

- added reference to languages and a link to the GG Language Guide

– May 22, 2015

- major re-write – review of all wording
- added revision notes in appendix