

Adding Cooperators (Contacts) into the Curator Tool

Adding Cooperators



Some organizations may refer to cooperators as “contacts.” Cooperators may be entered into the GRIN-Global system via either the Curator Tool or the Admin Tool.

This exercise is part of a series of step-by-step exercises on the GRIN-Global Curator Tool. You will learn how to import, input, and edit your genebank’s *cooperator data* in the Curator Tool. Basically, this data includes the names, addresses, and other contact information for the individuals and organizations involved with germplasm activities (the donors, collectors, breeders, requestors, etc.).

This exercise will demonstrate how to manually add cooperators as well as import, add, and edit cooperator data from genebank data already stored in a spreadsheet into the GRIN-Global Curator Tool.

Cooperators

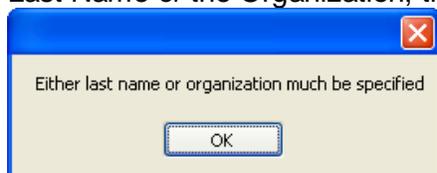
The Cooperator data view maintains the data related to individuals and organizations involved with germplasm activities. Historic addresses for a person or institution can be kept as well as a current address. Either the historic or the current address can be used depending on the application.

Cooperator Data View Fields

Most of the fields in the data view are fairly obvious: Last Name, First Name, Title (Dr., Mr., Ms. Dir., Prof., etc.), Job, Primary Phone, Secondary Phone, Fax, Email, etc. Refer to the data dictionary for details for any field in the data view; see the GRIN-Global [Data Dictionary](#). Several fields that are less intuitive are explained below.

Required Fields

When saving a cooperator record, you must select an entry for the Language field and *either* the Last Name *or* the Organization; these are the only fields required.

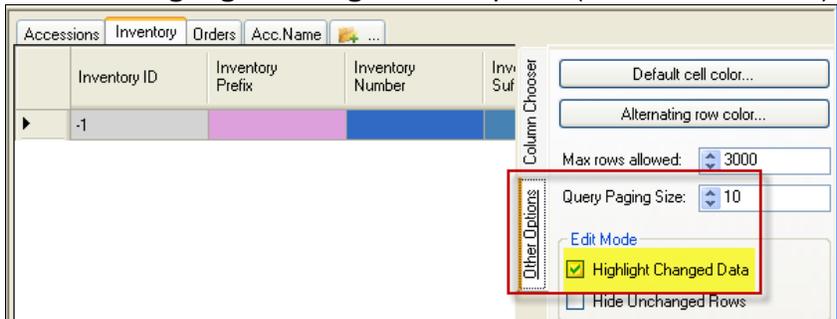


Several "Less Intuitive" Fields Explained (See the [Data Dictionary](#) for the complete list of field names.)

Field	Explanation
Cooperator ID	The system-generated primary key for this cooperator (person or organization). The ID serves as a link between the cooperator table and other tables in the database.
Current Cooperator ID	This data is used by GRIN-Global to locate the current address of the cooperator. You will have the choice when creating new cooperator records to either select an existing cooperator ID from a LookupPicker window, or have the record create the Current Cooperator ID for you, based on the data you initially include in several fields (Last Name, First Name, Initials, Organization, Address Line1, and Geography).
Is Active	This is a flag which, when selected, indicates this record is the active/current address for the cooperator.
Geography	Uses lookup values from the get_geography data view
Language	The primary language preferred by the cooperator.

If you don't add a link to another cooperator then IS active is filled in automatically because current_cooperator_id is understood to be the current entry. To change just change the current_cooperator_id to what the current address is.

To assist you when adding and editing data in the Curator Tool, on the **Other Options** tab, select the **Highlight Changed Data** option. (Click its checkbox.)



Cooperator (Contacts) Data View

If you haven't done so already, read the **Database and GRIN-Global Basic Concepts** section in the Curator Tool User Guide for details on data views.

Exercise

Step 1: Display the **cooperator** data view record if it isn't already visible. The cooperator data view name is **get_cooperator**.

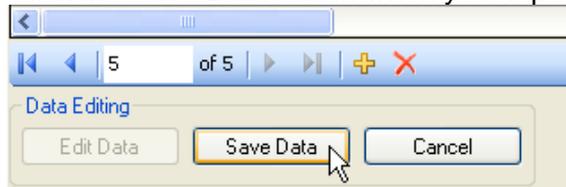
Step 2: Enter a new cooperator record; manually input and select data. Use your name and contact information. Remember that you cannot input data in cells that are gray.

Click on the **Is Active** cell. Complete the cells for the rest of the fields, as much as needed. (Not everyone needs all of the address line cells.)

You must include the required fields (Refer to the earlier section on [required fields](#) if necessary.)

Do not specify the Current Cooperator ID data.

Click the **Save Data** button when your inputting is complete.



Step 3: Review the new record, especially the Current Cooperator ID field. (Can you identify the fields used to build that field?)

Step 4: Create another cooperator record, only this time, instead of initially leaving the Current Cooperator ID field blank, use the LookupPicker when in that field to select a Cooperator.

[tbd any "twists" needed?]

Bulk Import from spreadsheet (match the columns...drag & drop a spreadsheet)

Add one record manually

Edit an existing record