10 Exercises for Becoming Familiar with the Curator Tool

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Download or open the current *Curator Tool User Guide*: http://www.ars-grin.gov/npgs/gringlobal/docs/gg_curator_tool_usermanual.pdf A detailed Table of Contents starts on page 3. You can jump to a topic in the Table of Contents by clicking on any entry listed there.

We recommend that you read the entire Curator Tool User Guide, (especially if you can't sleep at night), but if you prefer to just simply "dive in" and practice with the Curator Tool, then follow the exercises listed below in this document.

However, before beginning, you need to determine how you will be using GRIN-Global – in a networked situation, or on a stand-alone PC. In larger organizations, an administrator typically installs GRIN-Global on a network. When networked, GRIN-Global users can access and share data from remote locations. In smaller organizations, the complete GRIN-Global suite of applications might be installed on one or more stand-alone PCs. In that case, you as the PC owner may be filling both roles – administrator and user. If you are acting as the administrator of GRIN-Global on your PC, refer to the GRIN-Global training wiki page http://www.grin-global.org/index.php/Training for the *Administrator's* and the *Installation Guides*.

Prerequisite Data

Before completing this exercise, someone needs to import prerequisite data into GRIN-Global. In a networked environment, ideally the administrator has set up a GRIN-Global training database, where this data has already been loaded. Discuss this with the administrator – if that is the case, then you can continue with this exercise's Step 1 which follows this introduction.

If you will be running GRIN-Global on your stand-alone PC, before you can continue with this exercise, you will need to import prerequisite data onto your PC. Do not go to this exercise's step 1 until you have completed the importing of these files. This requires that you act as a GRIN-Global administrator on your PC. A separate exercise document on the GRIN-Global training wiki page has step-by-step directions for importing these ancillary tables via the GRIN-Global Admin Tool. See the Import Wizard & Code Group Editor Exercise (Admin Tool) link under the **Training Exercises** section of the GRIN-Global training page.

“10” Steps to Getting Familiar with the GRIN-Global Curator Tool

Start the Curator Tool. (Refer to the Curator Tool User’s Guide section, *Starting the GRIN-Global Curator Tool,* if you need directions. Also, be sure to read the *Prerequisite Data* section on the previous page.)

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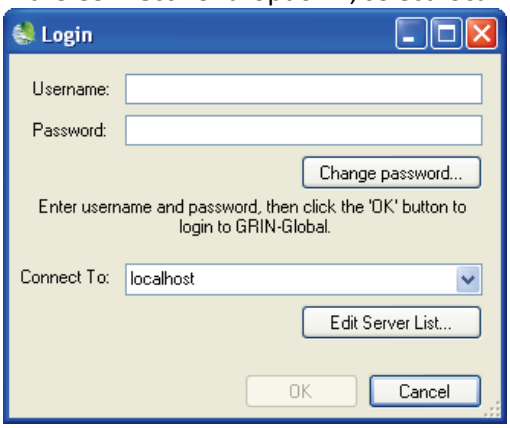
1. Log in

On a stand-alone PC

Enter “administrator” for the **Username**; also enter **“**administrator**”** for the **Password**.
In the **Connect To:** dropdown, select **localhost**.



In a networked environment

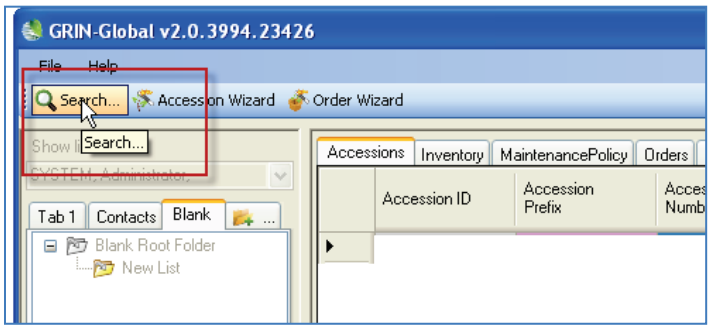
Obtain your **Username** and **Password** from the GRIN-Global administrator. Also obtain the server information (**Connect To:**) from the administrator.

Username: _____ Password: _____

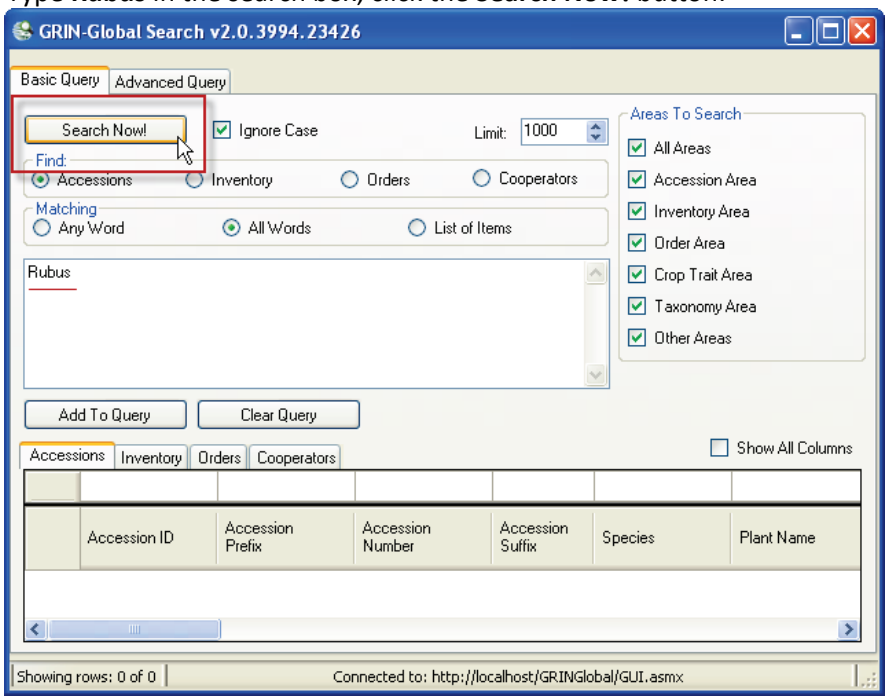
Connect To: _____

2. Search for sample records to review

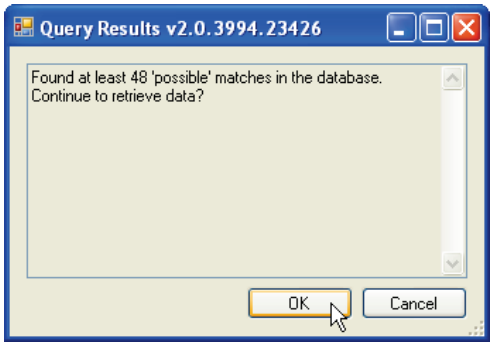
Search for some existing records in the database. In the Curator Tool, in the upper left corner, click on the Search button:



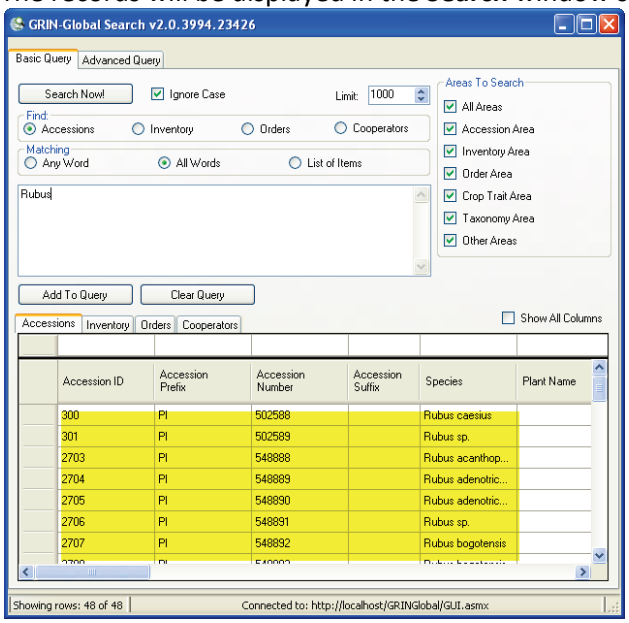
Type **Rubus** in the search box; click the **Search Now!** button:



You will be prompted with a **Query Results** window indicating that records have been found; click **OK** to continue:

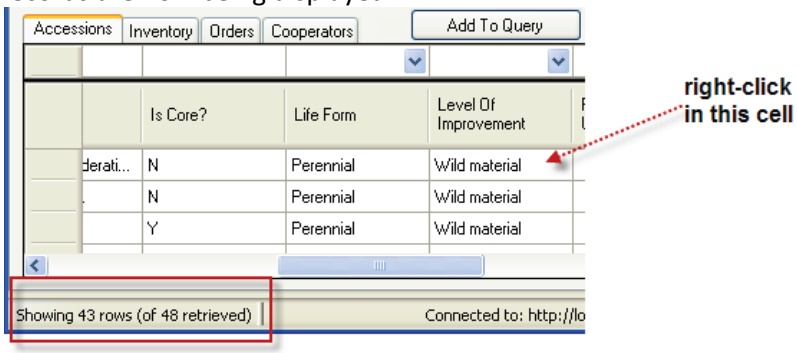


The records will be displayed in the **Search** window's grid:



3. Filter the Retrieved Records

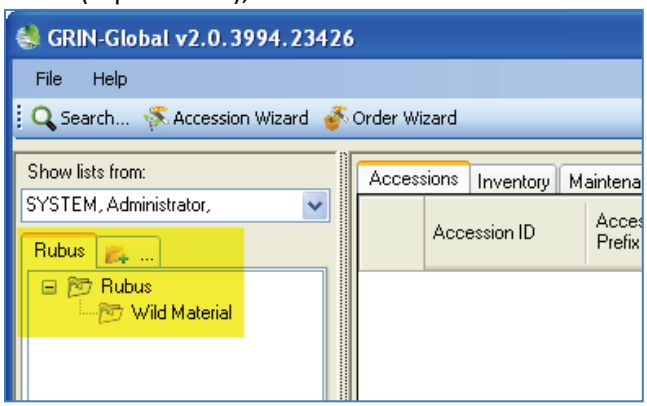
Practice filtering the records, to display a subset of those found by the initial search query. In the **Level of Improvement** column (scroll to the right), click in a cell whose data is "**Wild Material**." Right-click; and select "**Show only rows with this data**." The bottom, left corner of the grid, will indicate how many records are now being displayed:



4. Build a List in the Curator Tool.

See the Curator Tool User Guide *Lists* Overview section for background information on lists. Also refer to the section *Maintaining Lists to Organize Your Data* for detailed instructions on creating, naming, and managing lists.

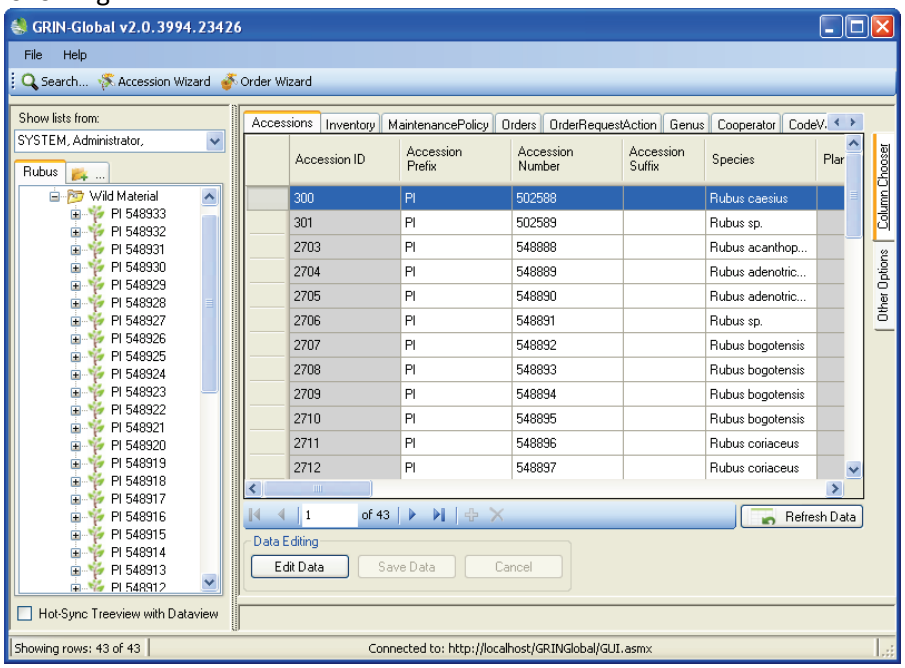
In this step, you will build and name a list in the Curator Tool. With this list, you will eventually be able to point to "your" Rubus (Wild Material) records for reference in future sessions. Name a tab, root folder (top level list), and a sub-list similar to the following:



5. Copy Records from the Search Tool to the Curator Tool

This step requires some manual dexterity! (Review the video http://www.ars-grin.gov/npgs/gringlobal/videos/lists.swf to see how it's done).

Drag your **Rubus – Wild Material** records into the Curator Tool. The end result should look similar to the following:

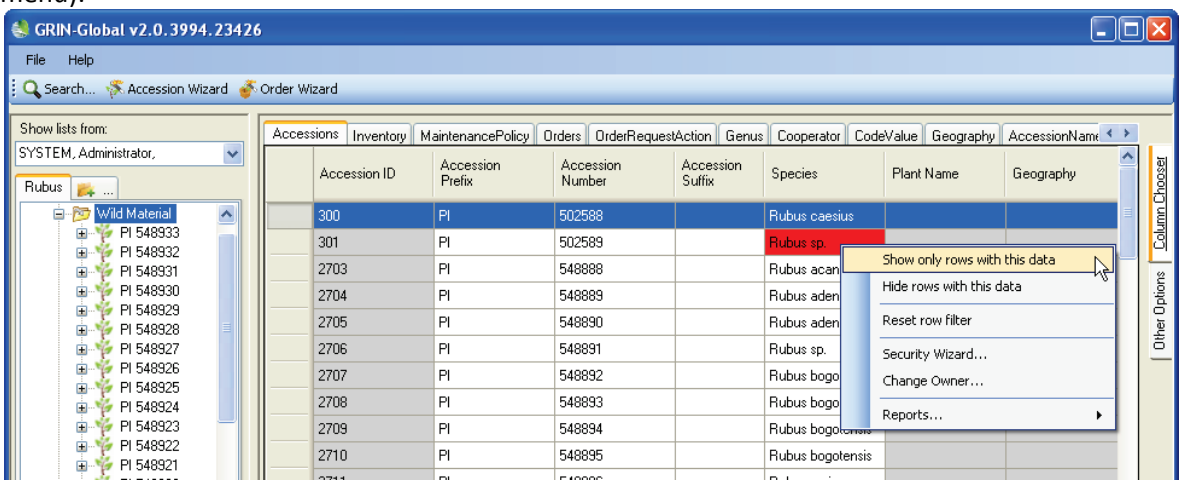


6. Practice Moving Items from One List to Another (& Renaming Lists)

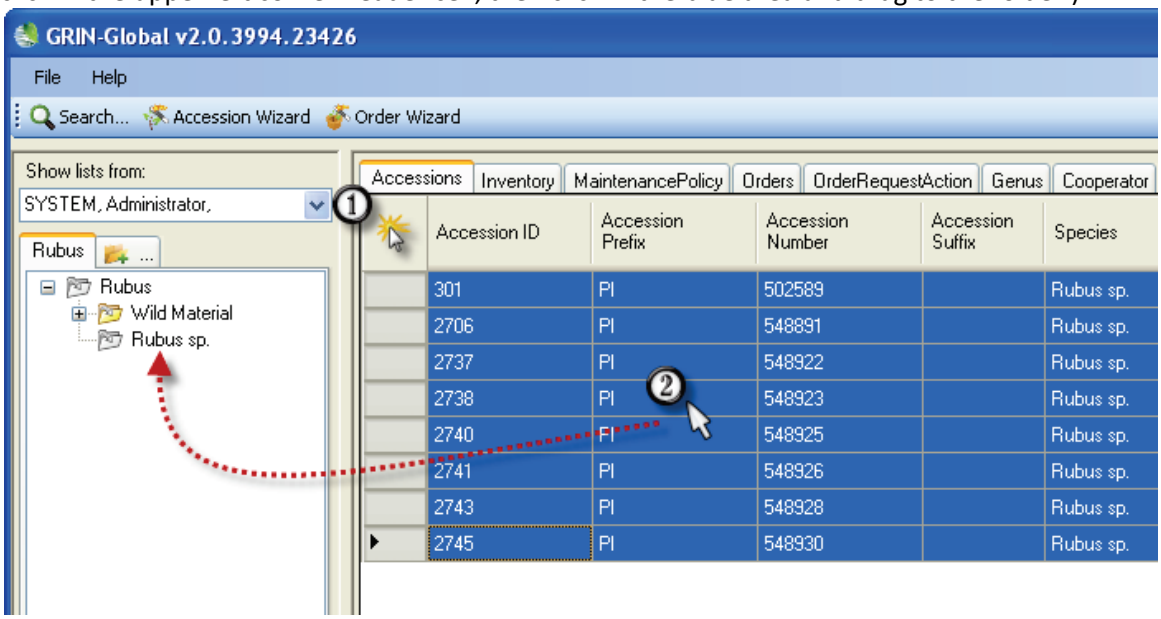
Lists are extremely versatile and personal. You create and modify lists to manage and track your data to meet your specific workflow needs.

When you delete items in *your lists*, you are not impacting the actual database records. Experiment! If you delete any list items, repeat the search that you did earlier in step 2 and you will see the records are still in the database.

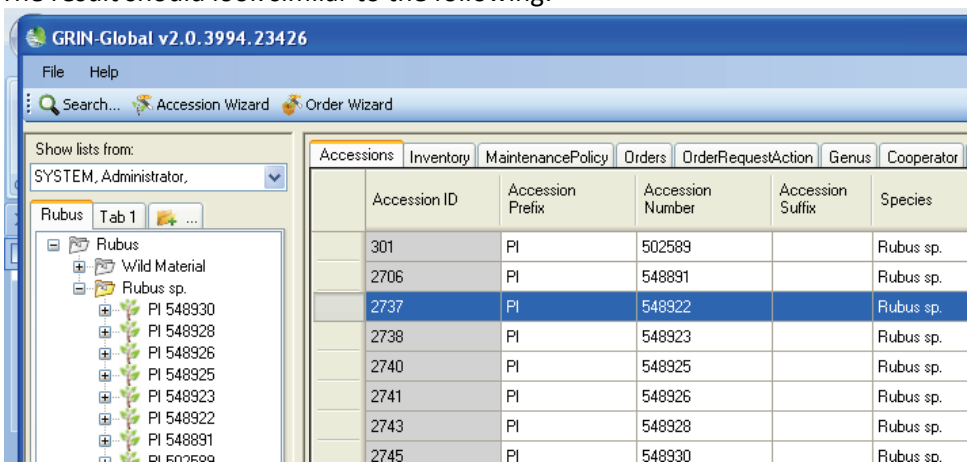
Filter your current records so that only **Rubus sp.** records are displayed. (Right-click to display the menu):



Either before or after the records are filtered, create another list; name it **Rubus sp.** Then drag the displayed records to this new list. (The quickest method for selecting all of the grid's records is to first click in the upper left corner header cell; then click in the blue area and drag to the folder.)



The result should look similar to the following:



So now you have two lists under Rubus. Rename the two lists to better reflect their actual contents, similar to the following example:

7. Edit a Record.

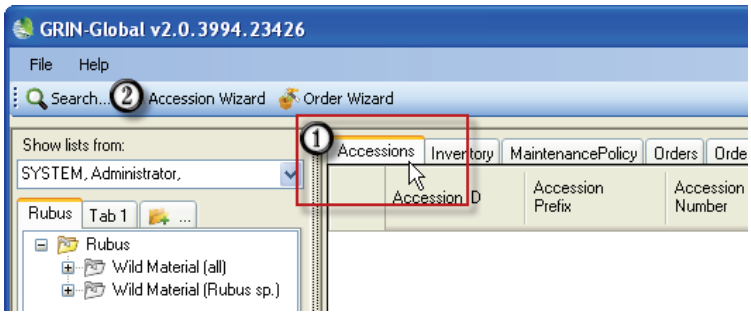
Before editing any data, take a moment to select the **Highlight Changed Data** option (on the **Other Options** tab on the right) so that when editing, the Curator Tool will display different indicator colors.

Edit the data in at least one of the *Rubus sp.* records. Save the changed record.

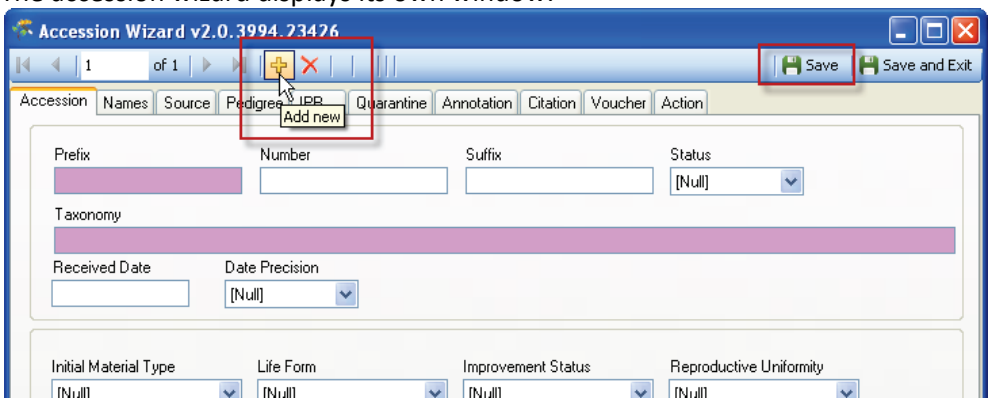
8. Create New Database Records

In this exercise, you will create a new accession record, using the Curator Tool's Accession Wizard. Refer to the Curator Tool User Guide's *Accession Wizard Overview* section for background information.

The first step is to ensure that the **Accessions** tab is the active tab in the data grid. If it is, then click on the **Accession Wizard** button:



The accession wizard displays its own window:

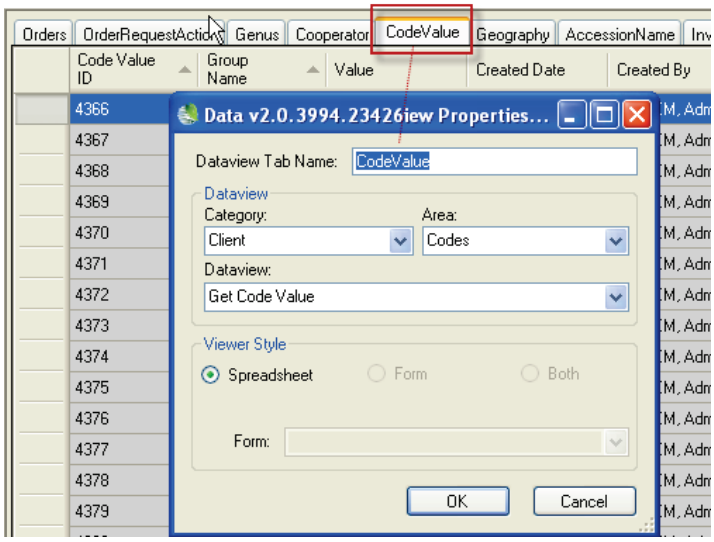


Click the **Add new** button to begin the inputting of a new accession. Create your own data for the fields. Remember that you must provide data for required fields, such as **Prefix** and **Taxonomy** (**Species**) which are denoted by a color. Fill in at least the first two screens (the **Accession** tab and the **Names** tab). Remember to use the **Save** button frequently. When you are finished, click the **Save and Exit** button in the upper right corner.

9. Explore Dataviews

Before completing this step, review the two sections on dataviews in the Curator Tool User Guide. An overview is in the *Database and GRIN-Global Basic Concepts* section; the steps for displaying dataviews are explained in the *Curator Tool Overview* section.

For practice, open at least one dataview whose tab is not visible in the data grid. For example, open the **Get Code Value** dataview.

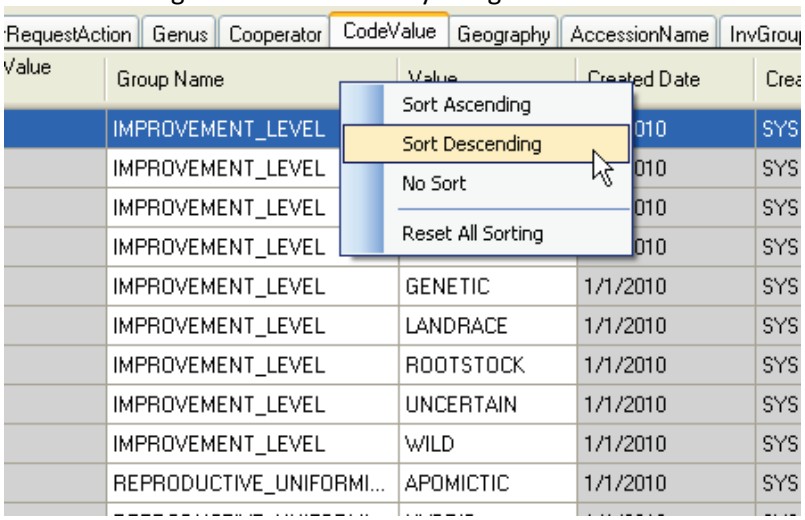


What are these Code Value records? Many Curator Tool dataviews use dropdowns to assist the user in selecting a valid entry from a list of possible values. The items in the dataview dropdowns are stored in two related Code Group tables, one of which this **Get Code Value** dataview is accessing. What codes and data values are stored in the two Code Group tables? All kinds! (A complete discussion of these is in the Import Wizard (Data Preparation) "Cookbook.") Do not confuse these codes with Crop Traits Descriptor Codes. The codes viewed in the **Get Code Values** dataview are codes used by the GRIN-Global software

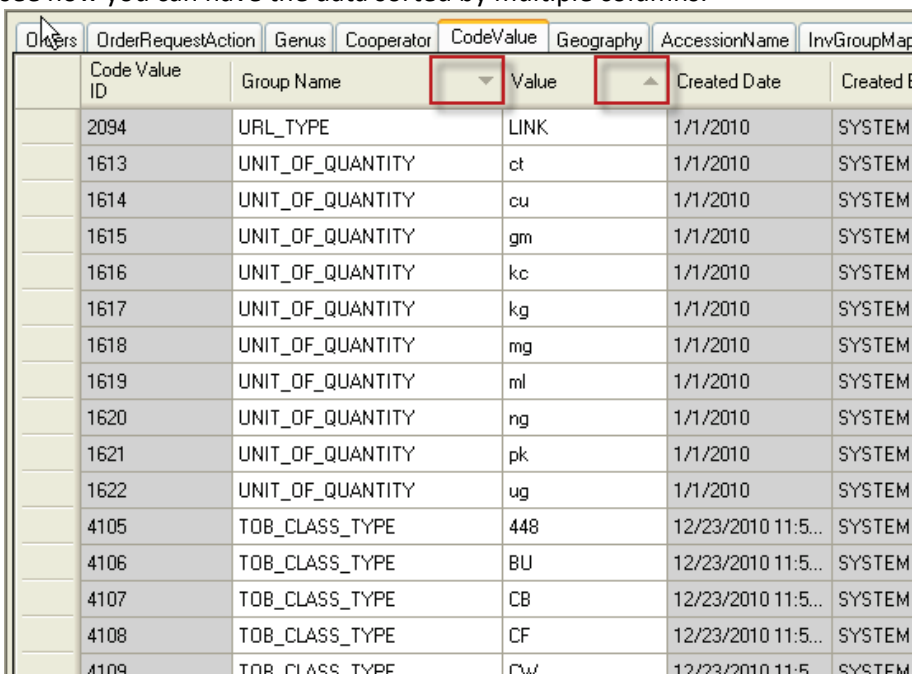
to restrict what data can be stored in specific fields. The Crop Traits Descriptor Codes, not relevant to this dataview in this exercise, are the codes used to describe the accessions' characterization and evaluation data.

Sorting the Data

Practice sorting the records. When you right-click on a column heading, a sort menu displays:



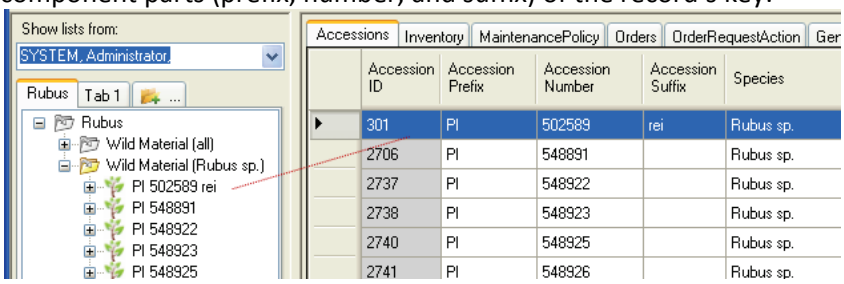
Sort the **Group Name** column in descending order and then sort the **Value** column in ascending order to see how you can have the data sorted by multiple columns:



Notice how the sorted columns now have sort directional indicators in their headings.

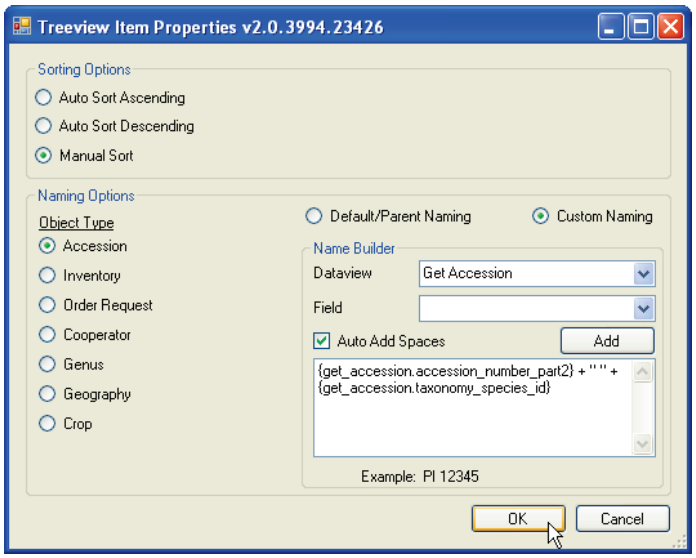
10. Change the Naming Option for List Items

List items have a default way of being listed. For example, accession items are listed with the three component parts (prefix, number, and suffix) of the record's key:

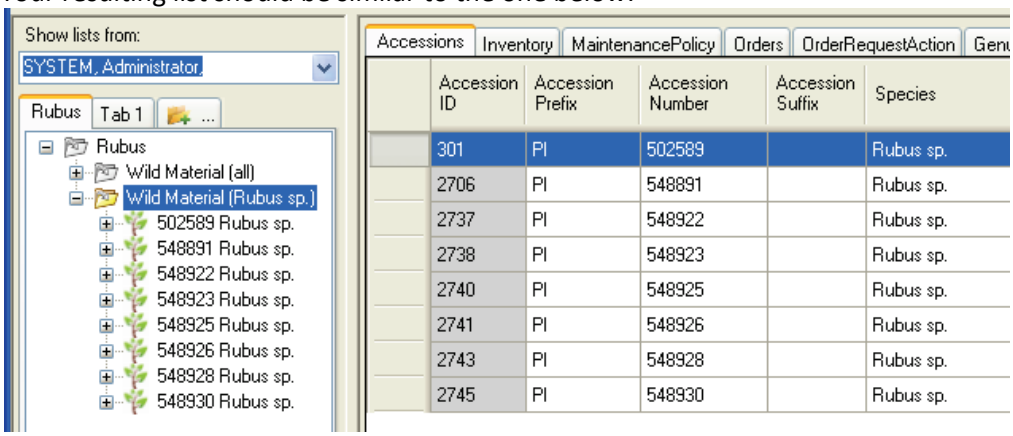


You can change the properties of a list so that the name can be virtually anything you want it to be. (Refer to the section *List Items' Custom Naming Feature* in the Curator Tool User Guide for a complete explanation of custom names for list items.)

Create a custom name for one of your Rubus lists to consist of the accession's **Number** and its **Taxon** fields:



Your resulting list should be similar to the one below:



11. Import Sample Data (from another Source)

(Okay, we said this lesson had 10 exercises. However, if you complete this suggested exercise, you will have mastered the basics of working with the Curator Tool and should be able to get started with your actual data.)

Learn how to import sample data (from another source) into the Curator Tool. Follow the step-by-step instructions for importing existing accession data from a source spreadsheet file. Complete the **Importing New Accessions** on the Training wiki page: http://www.grin-global.org/index.php/Training.