

Cooperator Records



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Comments/Suggestions

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Complete documentation on many aspects of GRIN-Global is available online at the GRIN-Global website's documentation page: <https://www.grin-global.org/userdocs.htm>. Recommended: bookmark this page, and avoid printing, as the GG documents are under an ongoing revision process.

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Overview of Cooperator Records

Individuals and organizations involved with germplasm activities (donors, collectors, breeders, requestors, CT users, etc.) are stored in the GG database as cooperator records. Besides the main **Cooperator** table, you will see below that several other specialized cooperator tables exist in GG.

When a cooperator record is created for a person, the person's surname (last name) and first name are included in their respective fields. A cooperator record for an organization omits any entry in these fields.

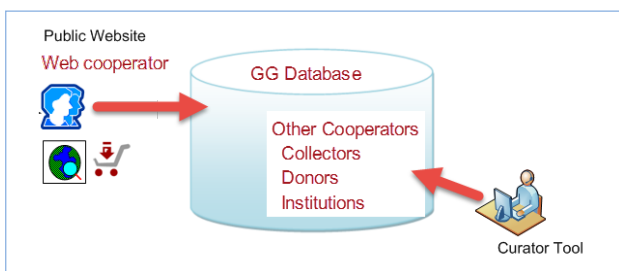


Not to be confused with the **Cooperator** table, a **Site** table exists in GG. The **Site** table is used to specify the sites within the GG organization. For example, in the USDA National Plant Germplasm System (NPGS) has more than 20 sites in that table. Each location within the NPGS has its own respective **Site** record.

Two Main Cooperator Types

Two types of cooperator records exist in GG:

- “web” cooperators
- “standard” cooperators



- *web* cooperators – users who self-enroll on the Public Website
- *standard* cooperators
Can be an:
 - *individual*
 - *organization* -- **Last Name & First Name** fields are empty

We will always distinguish between the two types of cooperator records by including “web” when referring to “web cooperator records.” Otherwise, when stating “cooperator records” we are referring to the main cooperator table (the *standard* cooperator records).

Web Cooperator Records

A user on the GG public website has an opportunity to self-register – during this registration process the user's contact information is stored in a *web* cooperator record. This web cooperator record is not the same thing as the GG cooperator record. (But the information in the web record will get converted into a cooperator record when the user submits an order.)

A web user can indicate multiple shipping addresses and indicate which is the default address to be used when submitting a request from the public website.



Genebank personnel, using the Curator Tool (CT), or by any method, cannot edit the data stored in the web cooperator and web address tables. (The web user is the actual owner of this data.)

Standard Cooperator Records

As mentioned previously, cooperator records contain data on individuals or organizations involved with germplasm activities (donors, collectors, requestors, etc.) Besides storing active address and organization data, cooperator records can be used to store historic data containing the previous addresses of a person or institution.

Sample (partial) Cooperator Record:

Accessions Inventory Order Request Item Cooperator Order Request Citation Get Accession Inventory Group Attach Accession Inventory Group Get Order Request Attach Order Request											
Cooperator ID	Status	Last Name	Title	First Name	Job	Organization Abbreviated	Organization	Address Line 1	City	Geography	Current Cooperator
175482	ACTIVE	Reisinger	Herr	Martin		RRG	Reisinger Re...	2 Southerly CT	Towson	Marylan...	Reisinger, Martin, Reisinger Resource Group, 2 Southerly CT, ...



Whenever working with, or searching for cooperators or web cooperators, we recommend that you update the cooperator lookup tables.



For various reasons, the cooperator table may have similar records for the same person or organization. The [Merging “Dups” to become One ACTIVE Coop](#) section explains how to manage “duplicates” and have them linked to each other. Ideally, for any person or organization, there is only one ACTIVE record. Other records should be either INACTIVE, or HISTORICAL.

Cooperator Lookup Tables

Three lookup tables exist to synchronize the three “cooperator” tables.

- Web Cooperator
- Cooperator
- Cooperator (Big)

Why three cooperator lookup tables?

The “Web Cooperator” lookup organizes the Public Website users.

The “Cooperator” lookup has a display field formed by cooperator last name, first name, and organization. It is a simple string used as a lookup on the GG records’ audit fields such as owned_by. It doesn’t need to be too defined because it is used for displaying which curator owns a record.

The “Big Cooperator” lookup includes five fields in the display string so that curators can distinguish public cooperators with similar names. This lookup pertains to the main cooperator table and is the lookup table that a Curator Tool user is typically using when selecting a cooperator.

The Big Cooperator lookup uses five fields:

Index key columns Included columns				
Name	Sort Order	Data Type	Size	
last_name	Ascending	nvarchar(100)	200	
first_name	Ascending	nvarchar(100)	200	
organization	Ascending	nvarchar(100)	200	
geography_id	Ascending	int	4	
address_line1	Ascending	nvarchar(100)	200	



When searching the Lookup Picker for an organization cooperator, if you enter a comma, space, comma, space – before the text, you will bypass the individuals. If you prefer, you can also start with the % wild card, but individuals may be listed as well.

In the following example, the user is looking for the Abbott organization to fill in the Cooperator field in an **Accession Source Cooperator** record. (The first three fields the lookup is using are **Last Name**, **First Name**, and **Organization**. An organization cooperator record will have empty **Last Name** and **First Name** fields.)

The screenshot shows a window titled 'Accession Source Cooperator' with a table of records. A 'Lookup Picker v1.9.8.30' dialog is open over the table. The dialog has a 'Filter' field containing 'Abbott' and a list of search results. The first result is 'Abbott & Cobb Seedsmen, 4744-46 Fr'. There is a 'Show Only Choices' checkbox which is checked. The table in the background has columns: Accession Source Map ID, Accession Source, Cooperator, Accession, and Source Ty.

Accession Source Map ID	Accession Source	Cooperator	Accession	Source Ty
815976	NSL 422608 DEVELOPED	Abbott & Cobb, Inc., , , , United...	NSL 422608	Developer
740371	NSL 391226 DEVELOPED	Abbott & Cobb, Inc., , , , United...	NSL 391226	Developer
741509	NSL 391292 DEVELOPED	Abbott & Cobb, Inc., , , , United...	NSL 391292	Developer
814367	NSL 422347 DEVELOPED			Developer
835019	NSL 428326 DEVELOPED			Developer
724763	PI 607572 DEVELOPED			Developer
875334	NSL 436611 DEVELOPED			Developer
740289	PI 612125 DEVELOPED			Developer
837266	NSL 428405 DEVELOPED			Developer



Use the % wildcard anywhere in the text string when searching to broaden your search. (Releases prior to 1.9.9.4 would display an error when the % sign was used in the middle of the search string, but that issue has been resolved .)

Cooperator Wizard

Use the Cooperator Wizard to add new cooperators or to edit existing ones. If you intend to edit an existing cooperator record, use the Cooperator Wizard to quickly locate the desired cooperator record. You can do this from any vantage point in the Curator Tool – you do not necessarily need to be in the cooperator dataview. In the following example, while the user had the **Accessions** dataview as the active dataview, he clicked on the **Cooperator Wizard** button and began searching for cooperators with a **Last Name** beginning with “reising”:

The screenshot shows the 'Cooperator Wizard' window. It has tabs for 'Cooperator', 'Web Cooperator', and 'Web Order'. The 'Cooperator' tab is active. There is a 'Search' field with 'reising' entered. Below the search field is a table of results. The table has columns: Cooperator ID, Status, Last Name, Title, First Name, Job, and Organization Abbreviation. The results show several records for 'Reisinger'.

Cooperator ID	Status	Last Name	Title	First Name	Job	Organization Abbreviation
148566	ACTIVE	Reisinger	[Null]	Martin A.		
175475	INACTIVE	Reisinger	Monsieur	Martin		RRG
175476	ACTIVE	Reisinger	Mr.	Martin		RRG
175478	HISTORICAL	Reisinger	Mr.	Martin		RRG
175479	ACTIVE	Reisinger	Mr.	Martin		RRG
175482	ACTIVE	Reisinger	Herr	Martin		RRG



Always search with either the Search Tool (ST) or the Cooperator Wizard before inputting a new cooperator. Use the ST when looking for institutes. Use a wildcard (the %) to broaden searches.

Creating a New Cooperator Record

Using the cooperator wizard is straightforward. Click on the **New...** button to create a new cooperator record. The wizard window starts a new row:

Cooperator Fields

Only two fields are displayed as required – **Status** and **Language**. (Language is not shown above – the field could be seen if the window was scrolled to the right.)

If the record is representing a person, the **Last Name** field should be filled. If the record is representing an Organization, then the **Last Name** and **First Name** fields should be left empty.

Status Codes



The **Status** field uses a code from the **COOPERATOR_STATUS** Code Group.

Fields Defined

These fields are documented in the online GG dictionary at <https://docs.google.com/spreadsheet/ccc?key=0AvdWZS-UqEE7dHFaRnRsR1RxOUx0em9KZmhNZTVIRnc&hl=en#gid=2>

You can also run a SQL query in the Public Website to display the table's definitions when you are logged in (if the GG administrator has linked your Public Website account to your CT account. You must be logged in. Sample SQL is shown below the image.

The screenshot shows a web interface for entering SQL queries. On the left, under 'Enter SQL', there is a text area with a sample query: `USE gringlobal;
SELECT
 st.table_name,
 stf.field_name,
 stf.max_length,
 stf.field_type,`. A 'Save SQL' button is next to it. On the right, under 'Load SQL from file', there is an instruction: 'After choosing a file, click the upload button and the text will appear in the textbox to the left.' Below this are 'Browse...' and 'Upload' buttons. The 'Browse...' button is disabled and shows 'No file selected.' Below the SQL input area, there are buttons for 'Show/hide columns', 'Show 10 rows', 'Excel', and 'CSV'. A search bar is also present. Below these buttons, a table displays the results of the query, showing 1 to 10 of 41 entries. The table has columns: table_name, field_name, max_length, field_type, field_title, and field_description.

table_name	field_name	max_length	field_type	field_title	field_description
cooperator	cooperator_id	0	INTEGER	Cooperator ID	cooperator_id -- The cooperator table's primary key (PK) field which is generated by GRIN-Global; cannot be edited
cooperator	current_cooperator_id	0	INTEGER	Current Cooperator	current_cooperator_id -- Filled in by GG when the record is initially saved. By default, it uses the cooperator key field to link, self-referencing to the cooperator table, and then selects the current address information. Field can be manually overridden to select a

SQL for Displaying Cooperator Fields

```
USE gringlobal;  
SELECT  
  st.table_name,  
  stf.field_name,  
  stf.max_length,  
  stf.field_type,  
  stfl.title as field_title,  
  stfl.description as field_description  
FROM  
  sys_table st  
  JOIN sys_table_field stf  
    ON st.sys_table_id = stf.sys_table_id  
  LEFT JOIN sys_table_field_lang stfl  
    ON stf.sys_table_field_id = stfl.sys_table_field_id  
  LEFT JOIN sys_lang sl2  
    ON stfl.sys_lang_id = sl2.sys_lang_id  
  LEFT JOIN sys_table_lang stl  
    ON st.sys_table_id = stl.sys_table_id  
  LEFT JOIN sys_lang sl1  
    ON stl.sys_lang_id = sl1.sys_lang_id
```

```

WHERE
sl2.sys_lang_id = 1
AND st.table_name = 'cooperator'
ORDER BY
    st.table_name, stf.field_ordinal

```

Editing / Updating an Existing Cooperator Record

Either use the Cooperator Wizard or the Search Tool to find the record to be edited.

You can edit directly in the Cooperator Wizard – find the record, make the edits, and then save the record. (If you need to cancel, click the Order Wizard window's **X** in the upper right corner.)

Cooperator Wizard

Save Save and Exit

Cooperator Web Cooperator Web Order

New...

Search: reisinger

	Cooperator ID	Status	Last Name	Title	First Name	Job	Organization Abbreviation
	105073	ACTIVE		[Null]			
▶	131088	ACTIVE	Reisinger	[Null]	Joe		
	132983	ACTIVE	Reisinger	[Null]	Martin		
	148566	ACTIVE	Reisinger	Director	Martin A.		
	151385	ACTIVE	Reisinger	Dr. Engineer	Peter		
	161944	ACTIVE	Reisinger	Frau Fraulein Herr	Martin		

When using the Search Tool, move the record into the Curator Tool, and then use the Cooperator dataview to edit.

Search Results

Add To Query Clear Query

Limit: 50 Page Size: 100

Accession Get Accession Source Cooperator InventoryGet Crop Get Crop Trait Get Crop Trait C Show All Columns

	Job	Organization Abbreviation	Organization	Address Line 1	Address Line 2
			Abbott & Cobb Seedsmen	4744-46 Frankford Avenue	
▶			Abbott & Cobb, Inc.		
			Abbott & Cobb, Inc.	11460 Fortune Circle	
			Abbott and Cobb, Inc.		

“Super” Cooperator Editors

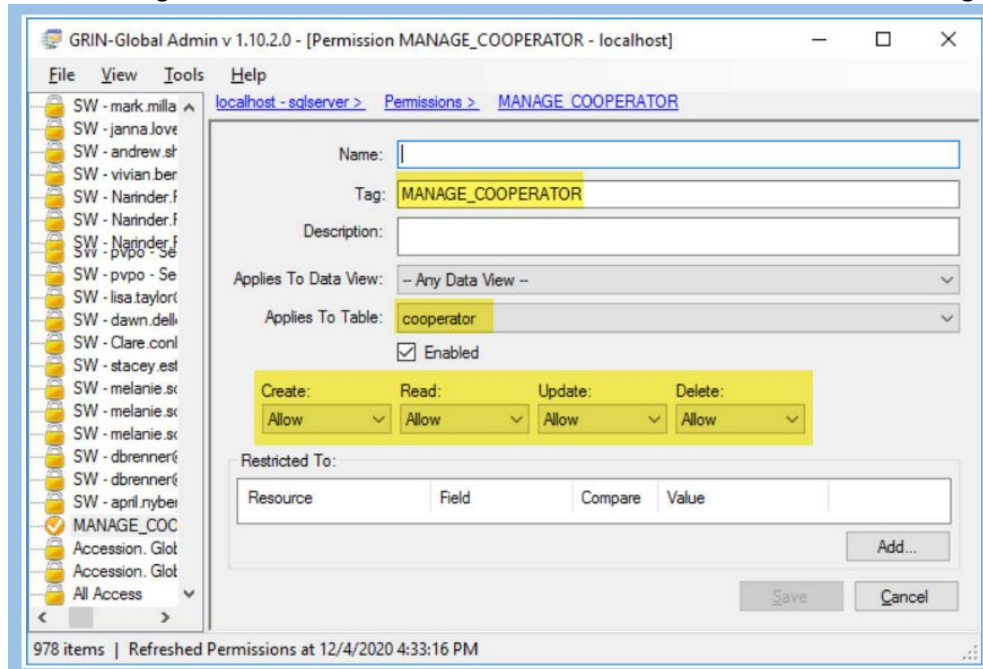


In NPGS, a permissions GROUP was created by the DBA to allow any CT user included in the group to have full permission to edit *any record* in the COOPERATOR table.

In GG organizations with multiple sites, it can be a nuisance if a CT user created the cooperator record (and owns it), but someone at another location later needs to edit the record. Adding trained users to a GROUP that can edit any record is very handy.

DBA Information Only:

The following screen is the screen the DBA uses in the Admin Tool to create the group:



In a GG database administrator’s workshop series, a session covered this topic in depth. A video and slides are available at https://rrginc.com/documents/admin_webinar.html

Determining who is a Super Coop Editor

Run this SQL query in the PW, under Tools:

```
SELECT c.site_id, su.user_name, sg.group_tag, sp.permission_tag, st.table_name, CONCAT(c.first_name,
',', c.last_name) AS owner
FROM sys_user su
JOIN sys_group_user_map sgum ON sgum.sys_user_id = su.sys_user_id
JOIN sys_group sg ON sg.sys_group_id = sgum.sys_group_id
JOIN sys_group_permission_map sgpm ON sgpm.sys_group_id = sg.sys_group_id
JOIN sys_permission sp ON sp.sys_permission_id = sgpm.sys_permission_id
LEFT JOIN sys_table st ON st.sys_table_id = sp.sys_table_id
JOIN cooperator c ON c.cooperator_id = su.cooperator_id
```

```

WHERE
sg.group_tag LIKE 'MANAGE_COOPERATOR%'
AND c.site_id = 3
ORDER BY sp.permission_tag, c.last_name

```

Deleting a Cooperator Record

You can delete a cooperator record in the Wizard, or in the cooperator dataview, using the standard method for deleting any record in the Curator Tool. (One method: select the record(s); then use the Delete key.)



A cooperator record cannot be deleted if it is used elsewhere. For example, if an **accession_source_cooperator** record uses that cooperator record, you will not be able to delete the cooperator unless you first delete the **accession_source_cooperator** record that links to the cooperator.

Merging “Dups” to become One ACTIVE Coop

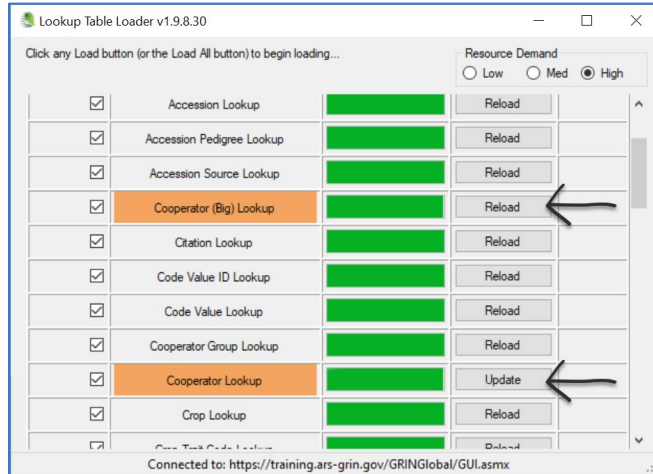
Issue: Two coop records in the database exist for the same person. Both are active records. The goal is to make one INACTIVE, and then have the INACTIVE record link to the active one.

This will result in pooling together any accessions received, collected, or donated by the same person to be tallied correctly on the Public Website. It will also result in having only one cooperator record display for that person in the Lookup Picker for any field that uses the cooperator(big) lookup (the main coop lookup). For example, when creating orders in the Order Wizard, or when selecting a cooperator for the accession_source_cooperator.

Using the following example, two active cooperator records exist for the same person. The older record (175475) is the record to be made INACTIVE, but ultimately link to the other (175482), which will be the only ACTIVE record.

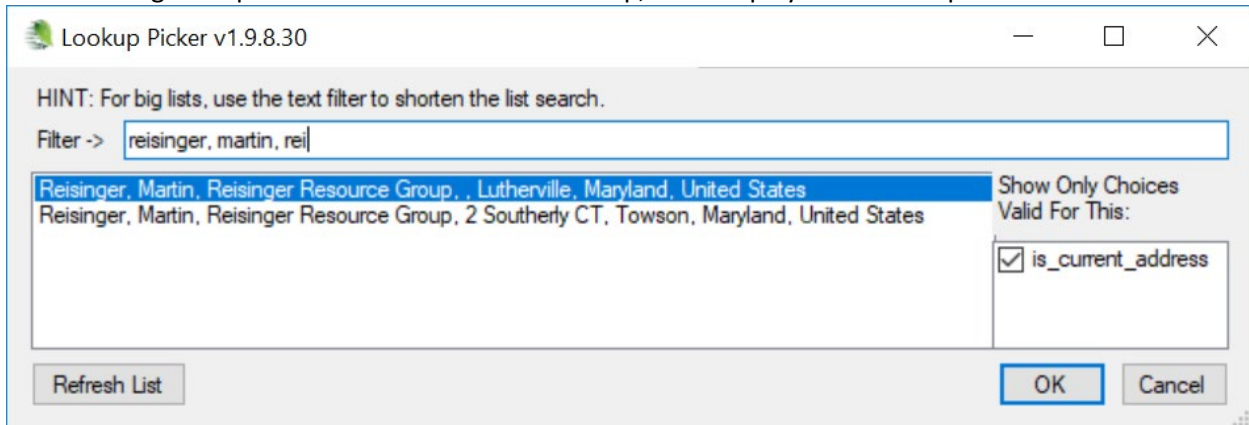
Site	Accessions	Inventory	Order Request Item	Cooperator	Order Request	Citation	Get Accession Inventory Group Attach	Accession Inventory Group	Get Order Request Attach	Order Request
Cooperator ID	Status	Last Name	Title	First Name	Job	Organization	Address Line 1	City	Geography	Current Cooperator
175475	ACTIVE	Reisinger	Monsieur	Martin	RRG	Reisinger Re...		Lutherville	Maryland...	Reisinger, Martin, Reisinger Resource Group, 2 Southerly CT, ...
175482	ACTIVE	Reisinger	Herr	Martin	RRG	Reisinger Re...	2 Southerly CT	Towson	Maryland...	Reisinger, Martin, Reisinger Resource Group, 2 Southerly CT, ...

The coop Lookup tables are not current (not unexpected). What is strange – one indicates “Reload,” whereas the other “Update.”

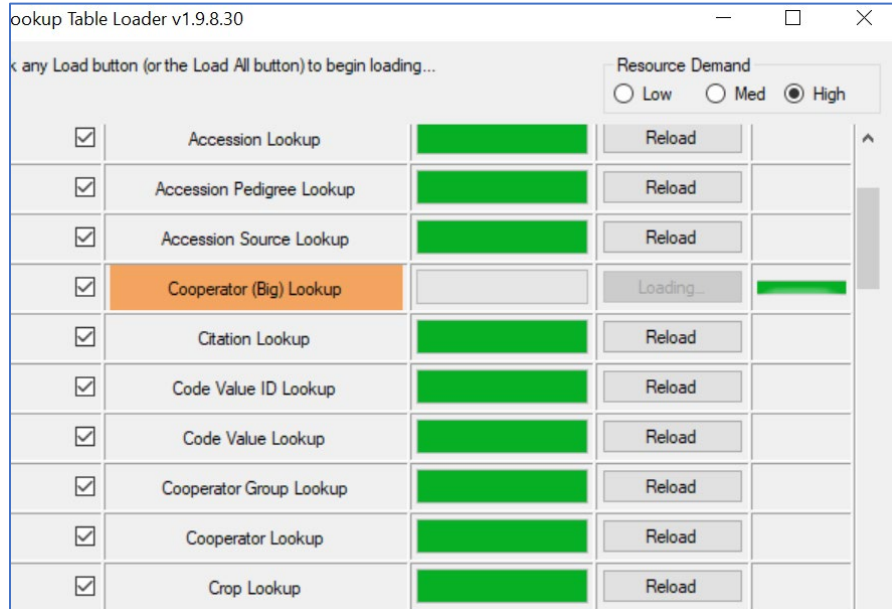


In any case, both should be “refreshed/Updated/Reloaded/whatever.” The table we are primarily interested in the Big Coop.

When adding a cooperator for accession source coop, both display in the lookup.



What is displayed in the Current Cooperator field is from the lookup **big_cooperator_lookup**. Sometimes the Big Cooperator Lookup table must be completely reloaded.



I edited the old record and made two changes:

1. Changed status to INACTIVE for **175475** (the older coop record)
2. Changed 175475's **Current Cooperator** to match the **Current Cooperator** of the new record (ID # 175482)

Cooperator ID	Status	Last Name	Title	First Name	Job	Organization Abbreviated	Organization	Address Line 1	City	Geography	D	Current Cooperator	Date
175475	INACTIVE	Reisinger	Monsieur	Martin		RRG	Reisinger Re...		Lutherville	Marylan...		Reisinger, Martin, Reisinger Resource Group, 2 Southerly CT, ...	U.S.
175482	ACTIVE	Reisinger	Herr	Martin		RRG	Reisinger Re...	2 Southerly CT	Towson	Marylan...		Reisinger, Martin, Reisinger Resource Group, 2 Southerly CT, ...	U.S.

To complete step 2, when using a lookup to fill in the **Current Cooperator** field, when searching for a cooperator to add data to an accession source coop field, I see two coops:

Lookup Picker v1.9.8.30

HINT: For big lists, use the text filter to shorten the list search.

Filter ->

Reisinger, Martin, Reisinger Resource Group, , Lutherville, Maryland, United S
 Reisinger, Martin, Reisinger Resource Group, 2 Southerly CT, Towson, Maryla

Show Only Choices Valid For This:

☒ is_current_address

Refresh List OK Cancel

So I checked the Lookups. They appeared to be current. However, I reloaded the Big Coop anyway.

Lookup Table Loader v1.9.8.30

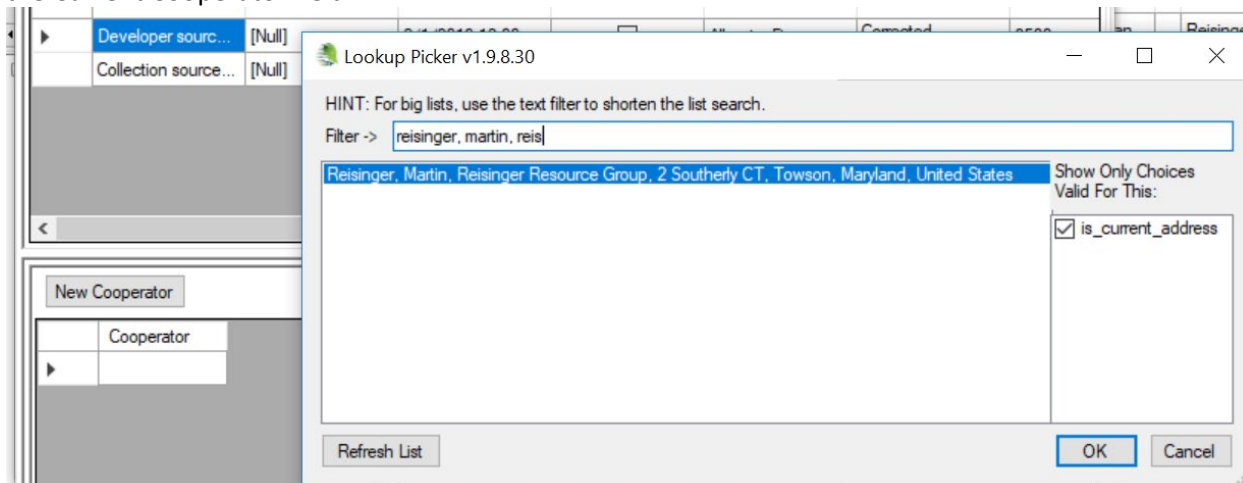
Click any Load button (or the Load All button) to begin loading...

Resource Demand
☐ Low ☐ Med ☒ High

Auto Update	Lookup Table Name	Progress	Load All	Activity
<input checked="" type="checkbox"/>	Accession Inventory Group Lookup	<div></div>	Reload	
<input checked="" type="checkbox"/>	Accession IPR Lookup	<div></div>	Reload	
<input checked="" type="checkbox"/>	Accession Source Lookup	<div></div>	Reload	
<input checked="" type="checkbox"/>	Cooperator (Big) Lookup	<div></div>	Loading...	<div></div>
<input checked="" type="checkbox"/>	Citation Lookup	<div></div>	Reload	
<input checked="" type="checkbox"/>	Code Value Lookup	<div></div>	Reload	

Connected to: <https://training.ars-grin.gov/GRINGlobal/GUI.aspx>

Now when I search for a coop when adding a cooperator to an accession source coop field, with the **is_current_address** checked, I see only one coop – the ACTIVE coop. I select that cooperator to fill in the Current Cooperator field:



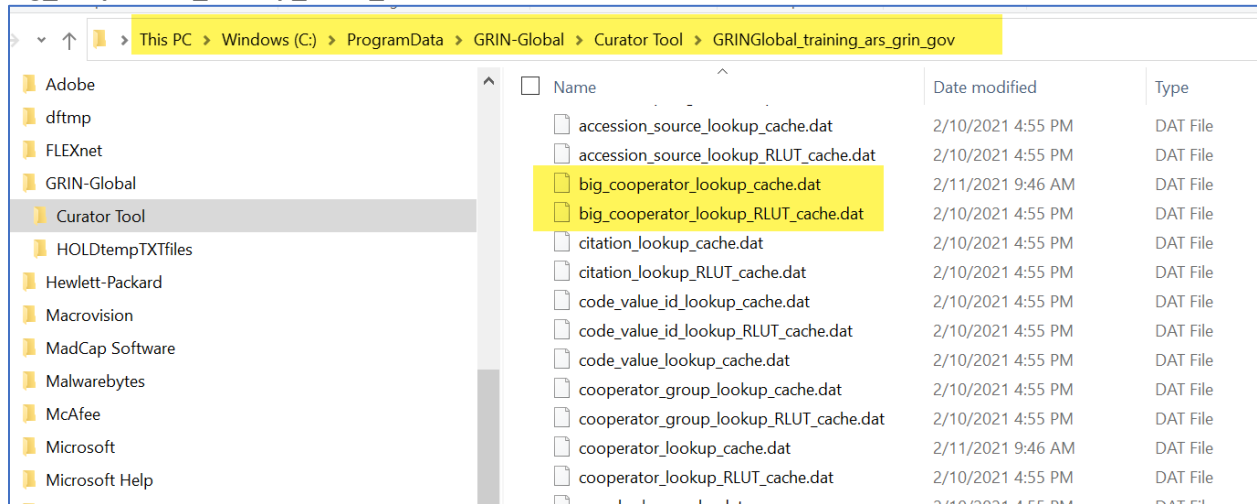
The ultimate goal is reached: the two coop records are “tied together.” The inactive record uses the lookup value of the newer ACTIVE record:

Cooperator ID	Status	Last Name	Title	First Name	Job	Organization	Address Line 1	City	Geography	D	Current Cooperator
175475	INACTIVE	Reisinger	Monsieur	Martin	RRG	Reisinger Re...	2 Southerly CT	Towson	Marylan...		Reisinger, Martin, Reisinger Resource Group, 2 Southerly CT, ...
175482	ACTIVE	Reisinger	Herr	Martin	RRG	Reisinger Re...	2 Southerly CT	Towson	Marylan...		Reisinger, Martin, Reisinger Resource Group, 2 Southerly CT, ...

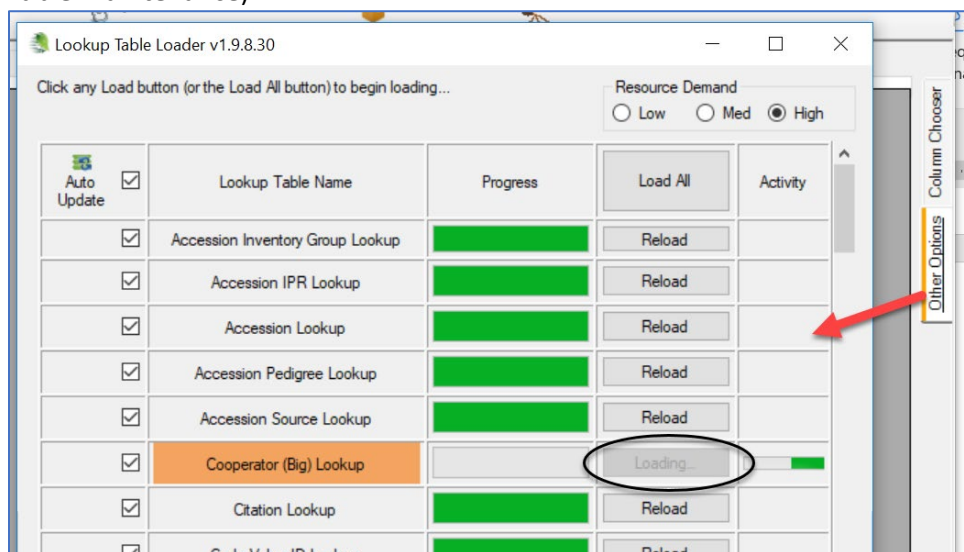
Appendix A: Clearing Cache Files for the Big Cooperator Lookup

If the reloading of a lookup fails, you can always try manually deleting the cache data in C:\ProgramData\GRIN-Global\Curator Tool\GRINGlobal_training_ars_grin_gov.

Specifically, for the Cooperator (Big) Lookup, the files **big_cooperator_lookup_cache.dat** and **big_cooperator_lookup_RLUT_cache.dat** can be deleted.



After deleting these files, use the **Lookup Table Loader** to rebuild the lookup (**Other Options | Lookup Table Maintenance**):



Appendix B: Document Revision Notes

– August 20, 2024

- Fixed a typo
- Minor wording and formatting changes

– November 28, 2023

- Added SQL code example for determining who is included in the `MANAGE_COOPERATOR` group (Super COOP Editors)

– June 9, 2022

- Added tip regarding the `MANAGE_COOPERATOR` group permission (Super COOP Editors)

– February 11, 2021

- Added tip / note regarding using a wildcard when searching in the lookup picker
- added screen showing cache data in `ProgramData`

– May 17, 2019

- Initial creation. Consolidated text from the CT User Guide and other cooperator-related documents.