Assignment 2:
Hands-on Practice with the Curator Tool

Revision Date
October 18, 2023

This exercise should be completed after attending the 2nd GRIN-Global webinar session.

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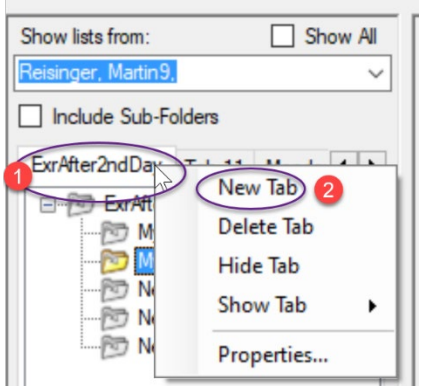
Create a new Tab

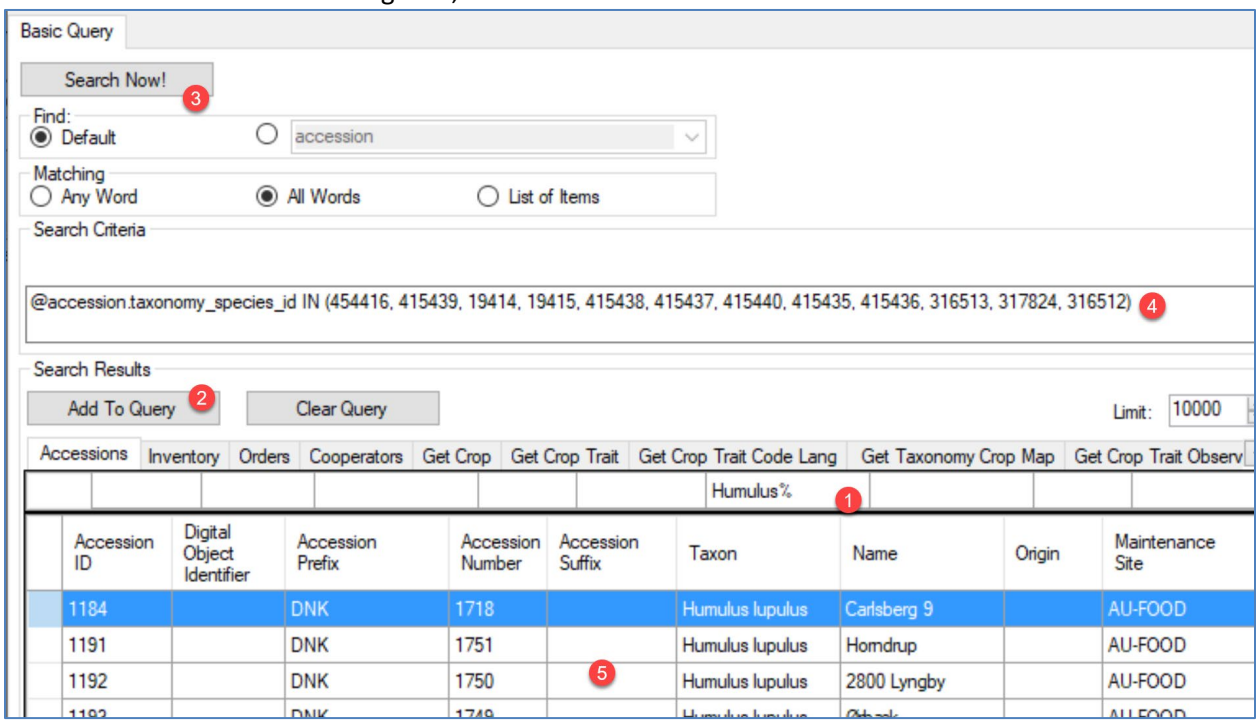
In the Curator Tool (CT), set up a new tab. Right click on an existing tab in the left, list panel.



Name the tab something – anything you prefer.

Searching the database

Open the Search tool. Search for a favorite genus of yours, such as *Humulus* or *Rubus*. Remember that the Taxon field expects a complete *Genus species*, so the genus by itself is not a complete entry for Taxon. Use a wild card with the genus, such as **Humulus%**.

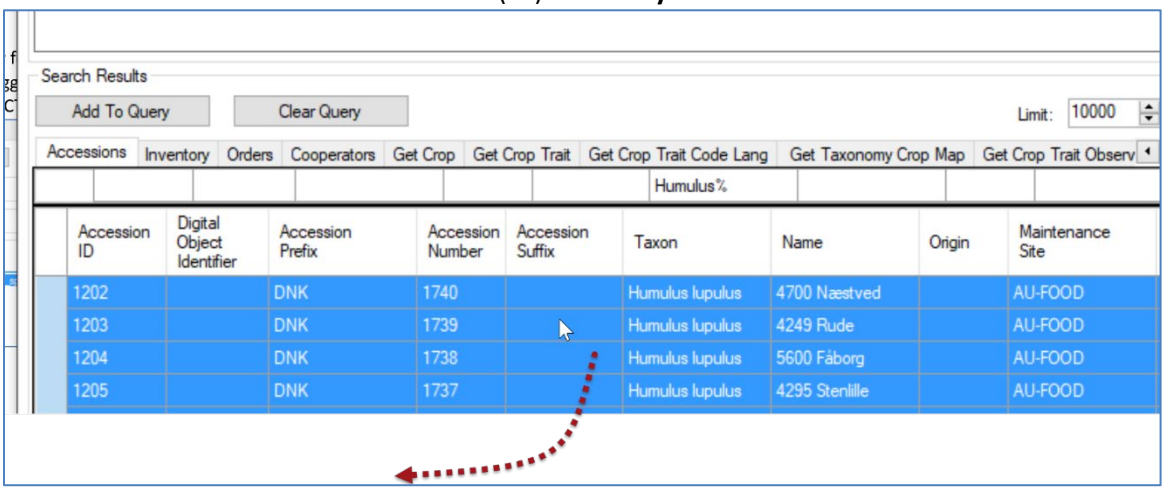


During this exercise, keep the Search Tool open. Minimize its window when you are not using it.

Build some folders

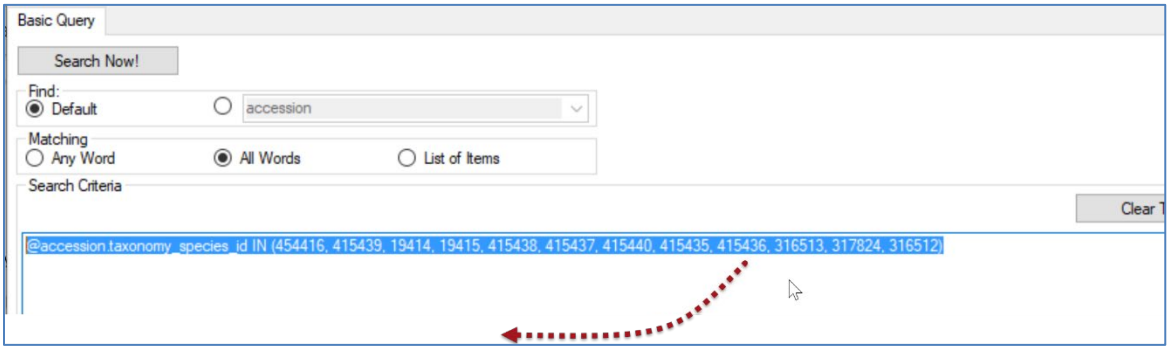
a. In the CT, create / name a new list / folder **My Favs**.

In the Search Tool, find some accessions for the Taxon in which you are interested. Drag some or all of the records from the Search Tool (ST) to the **My Favs** folder icon in the CT.

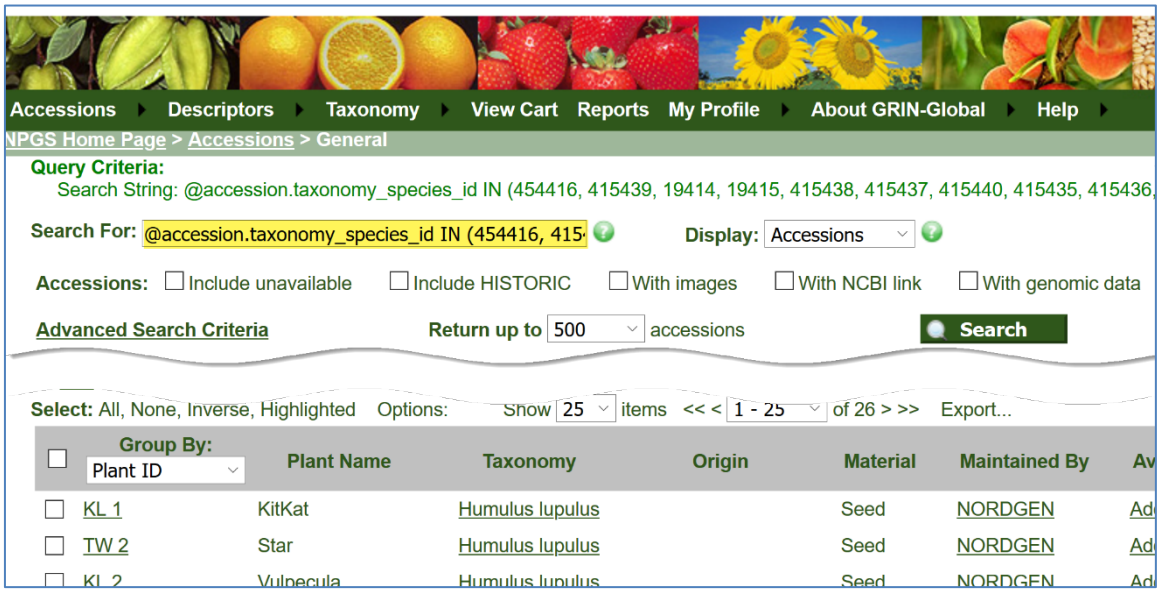


b. In the CT, create / name another folder **My Dynamic Favs**.

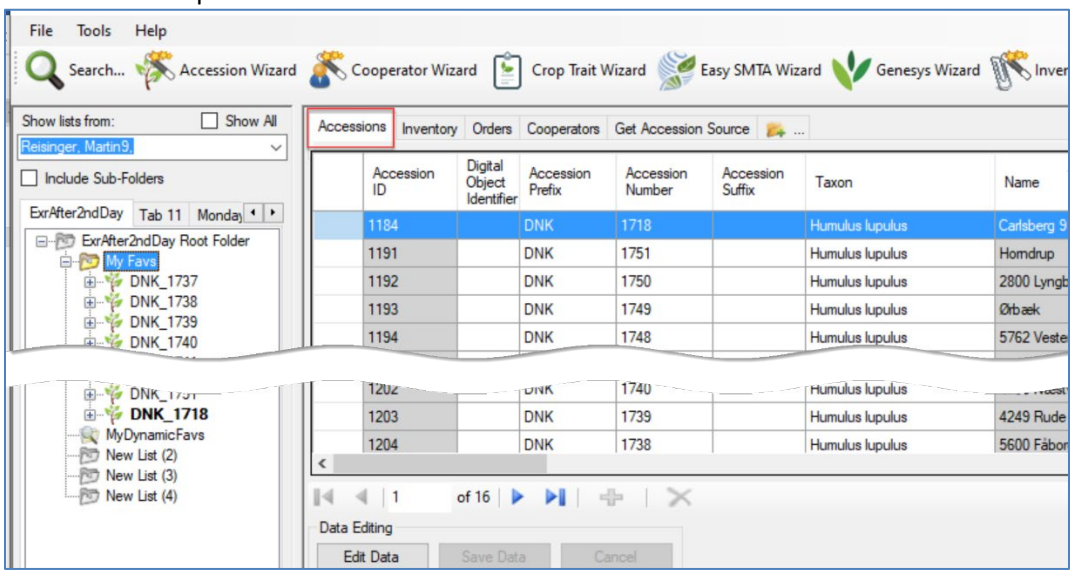
Switch back to the earch Tool again – this time, instead of dragging the found records, drag the text (the code) from the Search Tool's large text box to the dynamic folder **My Dynamic Favs** in the CT.



The Search box in the Search Tool is essentially the same as the search box on the Public Website. The Public Website sometimes uses additional coding, so the effects are not always *exactly* the same. However, you may find it handy to create a search criterion in the Search Tool, and then copy it to the Public Website. (You may even sometimes email this criterion to a public user, to assist them in their use of the PW.)



Shown here is a partial window of results that for **Humulus%**



Which of the folders on the previous page would be better for tracking a group of *specific* accessions? (a) or (b)

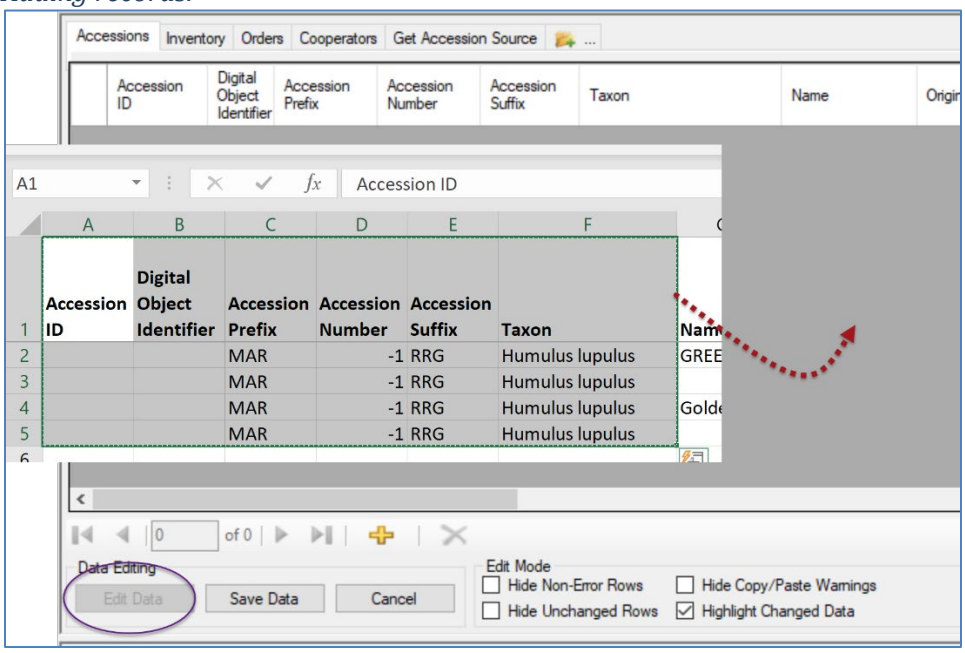
Bulk adding of accessions

By this, I mean creating new accessions by dragging rows from a spreadsheet to the Curator Tool.

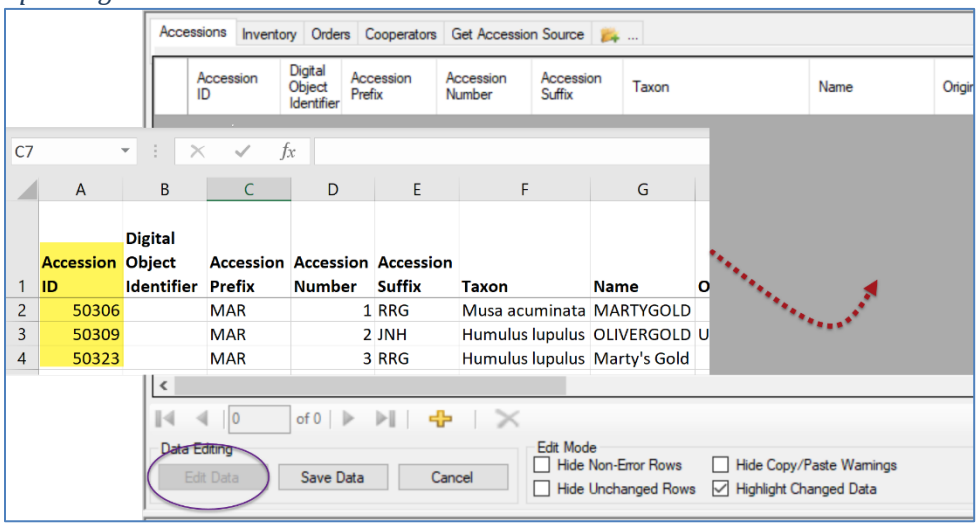
The key points are:

- columns must be ***identically spelled*** in the CT and in the spreadsheet
- when adding new records, not all the columns need to be included, but the ***ID column must be included***
- when ***adding new*** records, the cells under the **ID column** are *empty*
- when ***updating existing*** records, the ID column *is filled* with the corresponding IDs of the existing records
- the CT must be in edit mode when you drag the rows from Excel to the CT

Adding records:



Updating records:

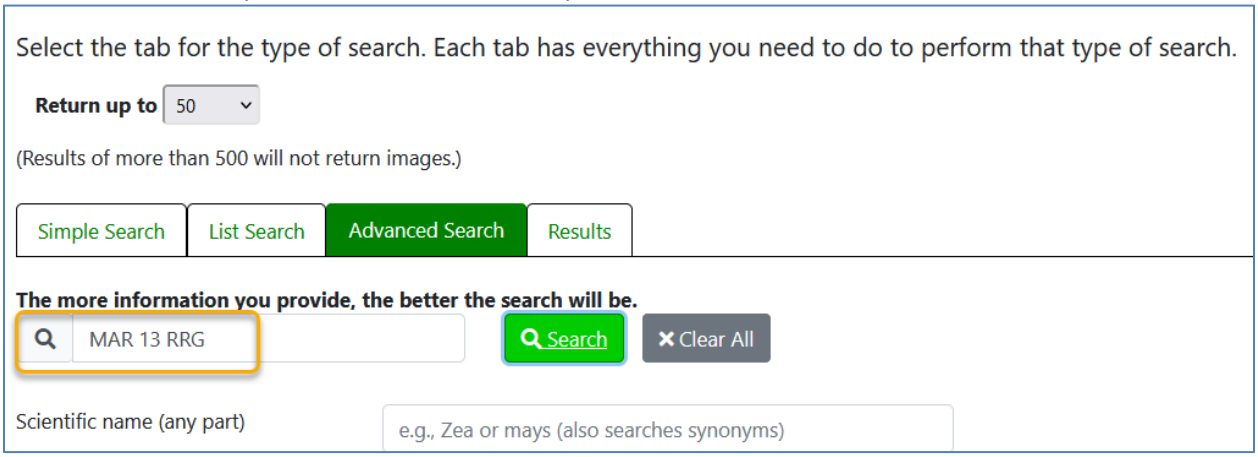


Practice!

Drag and Drop

Practice *adding* a set of (~ 10 or so?) Accession records from a spreadsheet at one time. Remember when adding the new accessions from the sheet to the CT that you will include the **Accession ID** heading, but the IDs will be empty.

a. You might consider using the Search Tool to find Accessions from which you can use to model your new accessions. You can drag one or more Accessions from the Search Tool to a spreadsheet.
b. In the spreadsheet, modify some of the fields – don't worry about the audit fields (or any gray fields). Be sure to include the field **Is Web Visible?** and indicate with **Y** for the column.
c. Drag the spreadsheet records to the CT, and drop in the datagrid in the right panel.
d. Open a browser window and use the URL: https://training.ars-grin.gov/gringlobal/search to search for one of your new accessions. Example:



System Inventory Records

When you switch from the Accession dataview to the inventory dataview, you will see system inventory records that are needed by the CT. However, since they are not meaningful to the CT user, they can be hidden.

If you have a folder with a list pointing to Accessions records, and then switch to the inventory dataview, try hiding the system inventory records. What do you do to hide them? (answer on the next page)

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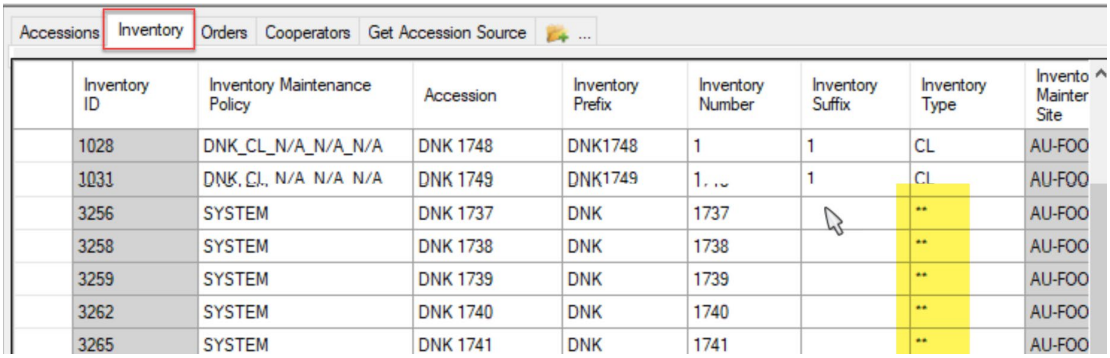
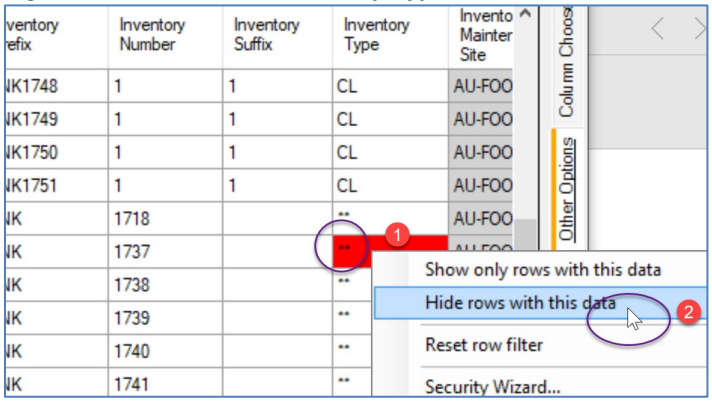
Hint:



Inventory ID	Inventory Maintenance Policy	Accession	Inventory Prefix	Inventory Number	Inventory Suffix	Inventory Type	Invento Mainter Site
1028	DNK_CL_N/A_N/A_N/A	DNK 1748	DNK1748	1	1	CL	AU-FOO
1031	DNK_CL_N/A_N/A_N/A	DNK 1749	DNK1749	1	1	CL	AU-FOO
3256	SYSTEM	DNK 1737	DNK	1737		**	AU-FOO
3258	SYSTEM	DNK 1738	DNK	1738		**	AU-FOO
3259	SYSTEM	DNK 1739	DNK	1739		**	AU-FOO
3262	SYSTEM	DNK 1740	DNK	1740		**	AU-FOO
3265	SYSTEM	DNK 1741	DNK	1741		**	AU-FOO

Right-click in the field **Inventory Type** field; select **Hide rows…**



e. Leave the browser window open, but return to the CT and edit the records in the CT. Change at least one of the accession to have its **Is Web Visible?** column unchecked (not selected) and return to the Public Website to see what effect this has. What effect does it have?

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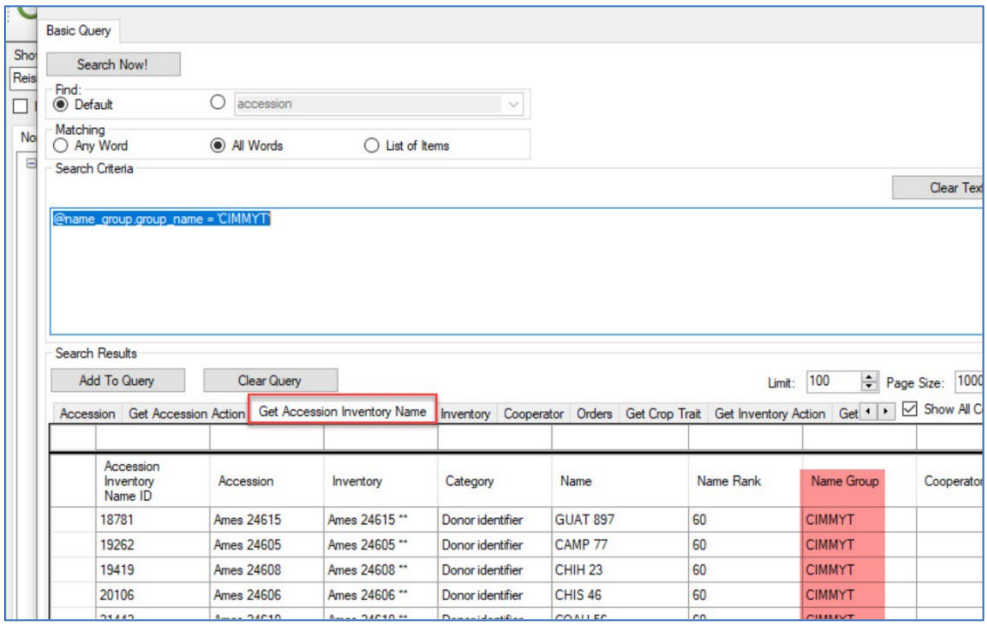
Name Groups

To simplify the discussion of adding a Name record, we never really discussed the **Name Group** field. Let's explore that now. Here's an example of one Name Group used in the USDA database:



In this example, these records are the names for accessions that came from the CIMMYT genebank. When creating a new **Name** record, the **Name Group** field is selected from a Lookup Table. That means then that a table of Group Names is being used for this field, so you cannot simply enter anything. You must use an existing **Name Group**.

The document, ***Grouping Summary Guide***, summarizes several ways to group records in GG including these Name Groups. See https://www.grin-global.org/docs/gg_grouping_summary.docx

On page two I summarized what Name Groups are typically used for: "Name Group can be used to group plant names. An accession inventory name can belong to just one group…"

Practice! (Easy to do!) Explore making a **Name Group**. Use the document mentioned above. Create a new **Name *Group*** record. Then use it while making a **Name** record. If initially the name doesn't display in the Lookup Picker window, use the Refresh button and it should display then.

I'll discuss grouping later, and show another way to group accessions which I think is more useful than Name Groups for grouping accessions easily for Public Website users.

Practice! Back to something said earlier. Try deleting the **Accession** record for which you had created the **Name** record. …You can't!

Inventory

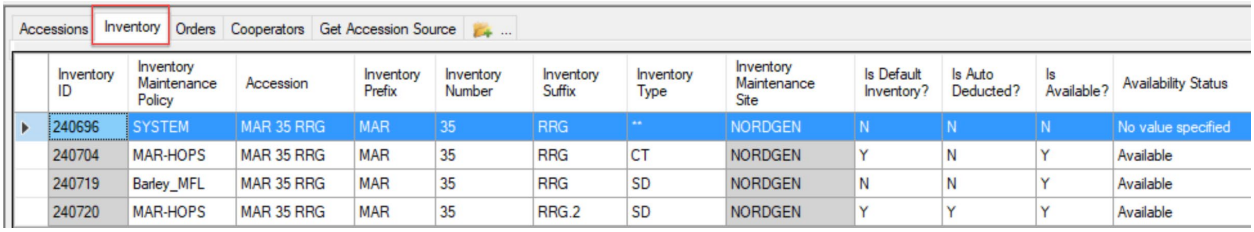
The complete Inventory Guide is online at https://www.grin-global.org/docs/gg_inventory.docx

Some bullet points here:

- every accession has at least one inventory record; this record is referred to as the system inventory record. It *does not represent a physical inventory lot*, such as a jar of seeds.

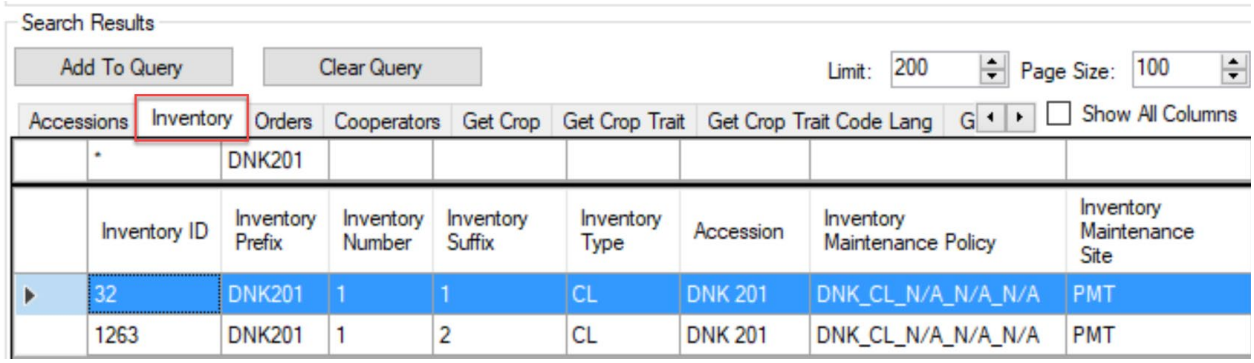
  When a new accession record is created, the accession's system inventory record is also created.
- system inventory records always have the same **Type** field: **
- every inventory identifier must be a unique combination of 4 fields:
  - **Prefix**
  - **Number**
  - **Suffix**
  - **Type**
- An accession may have several (or even many) inventory lots – there is no limit. But always keep in mind the rule immediately above…

Examples:



Accessions | Inventory | Orders | Cooperators | Get Accession Source

Inventory ID	Inventory Maintenance Policy	Accession	Inventory Prefix	Inventory Number	Inventory Suffix	Inventory Type	Inventory Maintenance Site	Is Default Inventory?	Is Auto Deducted?	Is Available?	Availability Status
240696	SYSTEM	MAR 35 RRG	MAR	35	RRG	**	NORDGEN	N	N	N	No value specified
240704	MAR-HOPS	MAR 35 RRG	MAR	35	RRG	CT	NORDGEN	Y	N	Y	Available
240719	Barley_MFL	MAR 35 RRG	MAR	35	RRG	SD	NORDGEN	N	N	Y	Available
240720	MAR-HOPS	MAR 35 RRG	MAR	35	RRG.2	SD	NORDGEN	Y	Y	Y	Available



Search Results

Add To Query | Clear Query | Limit: 200 | Page Size: 100

Accessions | Inventory | Orders | Cooperators | Get Crop | Get Crop Trait | Get Crop Trait Code Lang | G | Show All Columns

	Inventory ID	Inventory Prefix	Inventory Number	Inventory Suffix	Inventory Type	Accession	Inventory Maintenance Policy	Inventory Maintenance Site
	*	DNK201						
▶	32	DNK201	1	1	CL	DNK 201	DNK_CL_N/A_N/A_N/A	PMT
	1263	DNK201	1	2	CL	DNK 201	DNK_CL_N/A_N/A_N/A	PMT

Inventory Maintenance Policy

In a few minutes you will create several inventory records for at least two of your accessions. However, before you can do that, you need to understand the role of the Inventory Maintenance Policy…

One of the inventory record's required fields is the **Inventory Maintenance Policy**. Before you create an inventory record, you must decide on what **Inventory Maintenance Policy** you will use. In the current database, some of these policies exist – you could use one of them. But it would be better if you didn't, but instead create your own policy.

An important rule to remember in GG is that whoever owns the policy record, when it is used in creating the new inventory record, will also be the owner of the inventory record. Why was this designed to work this way?

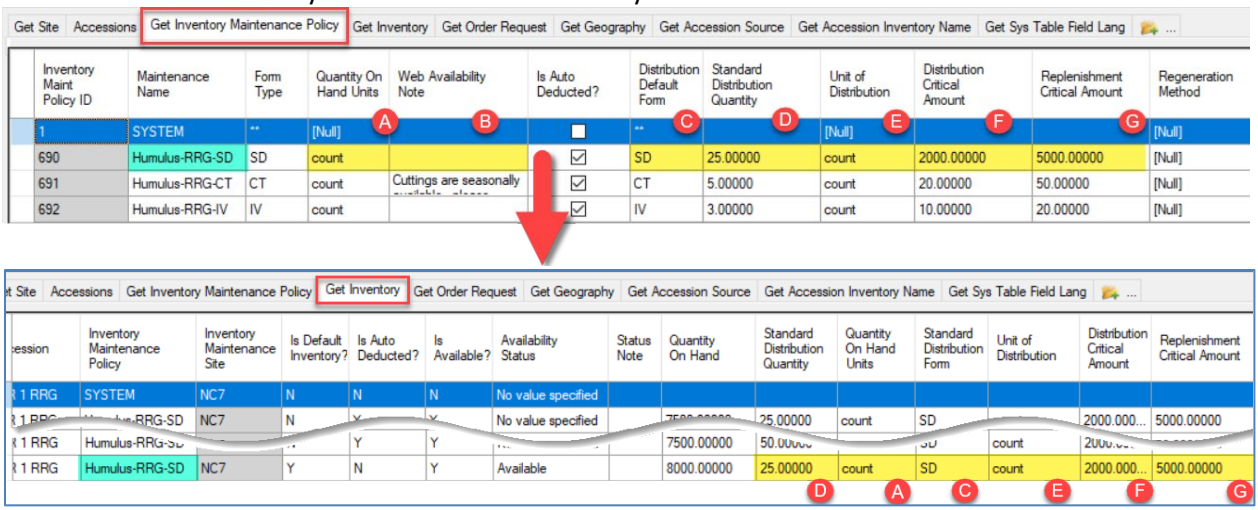
Think of this case – as the curator, you may have many technicians, students, or perhaps even volunteers who may be cleaning and counting seeds and in turn creating GG inventory records. As the curator you may want them to do that, and also create the corresponding inventory records, in the database. But later you will want to control these records and be able to edit the records.
(Later we'll discuss ownership and permissions in detail.)

All that said, for this exercise you should create your own **Inventory Maintenance Policy** (IMP) record; otherwise, use an existing policy. Unless you use your IMP, *you will not own the new inventory record*.

Think of a policy as nothing more than a template for creating a *new* inventory record. You might expect the policy (because of the word "policy") to continue to control the inventory record, but after the inventory has been created, the policy basically no longer impacts the inventory record.

From page 14:

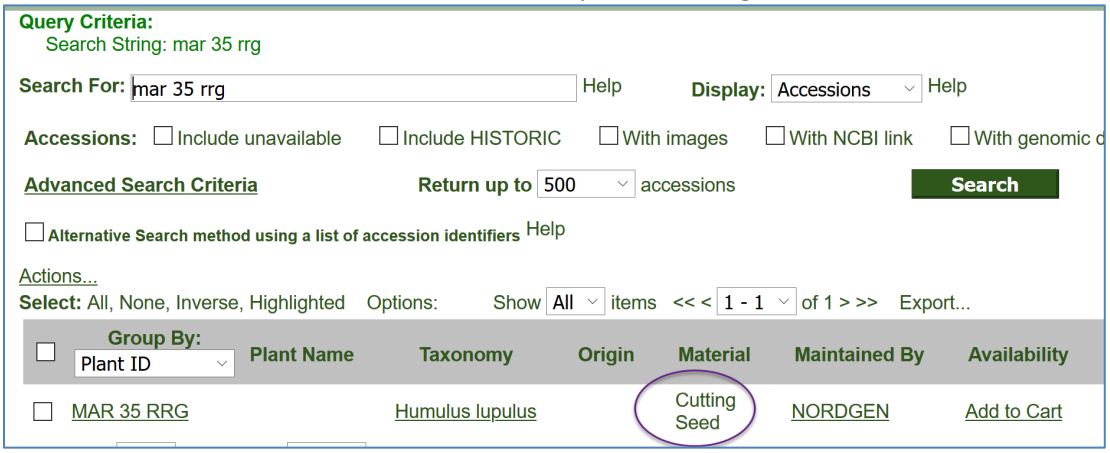
An **Inventory Maintenance Policy** record (shown here with the red letters) will fill in the respective fields in the new inventory record when the inventory record is saved.



(**Web Availability Note** not shown in the second graphic, but that field would be empty in this example since the corresponding policy has an empty Web Availability Note field.)

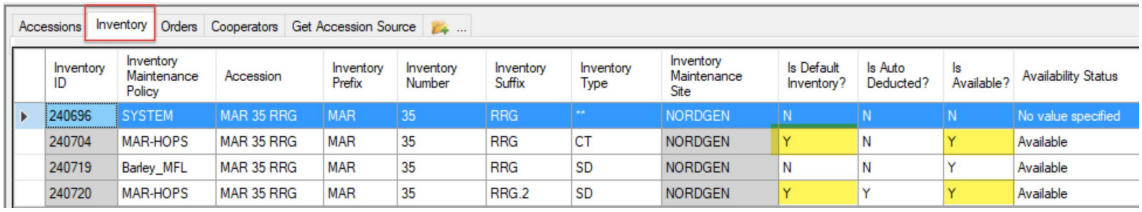
Some more bullet points on inventory:

- It is now possible in GG for the Public Website user to select a preferred inventory form when more than one form is available. (This was a fairly recent change to GG.)



- In future releases, GG will most likely be modified to handle seasonal date restrictions, and possibly allow the user to select from inventory when multiple lots of the same type are available for the accession. For example, one accession may be growing in the field and has several plants. Some curators might want to make each individual plant available for cuttings

- *Inventory is only considered available when two fields on the inventory record are = "Y"*
  - Is **Default Inventory?**
  - **Is Available?**



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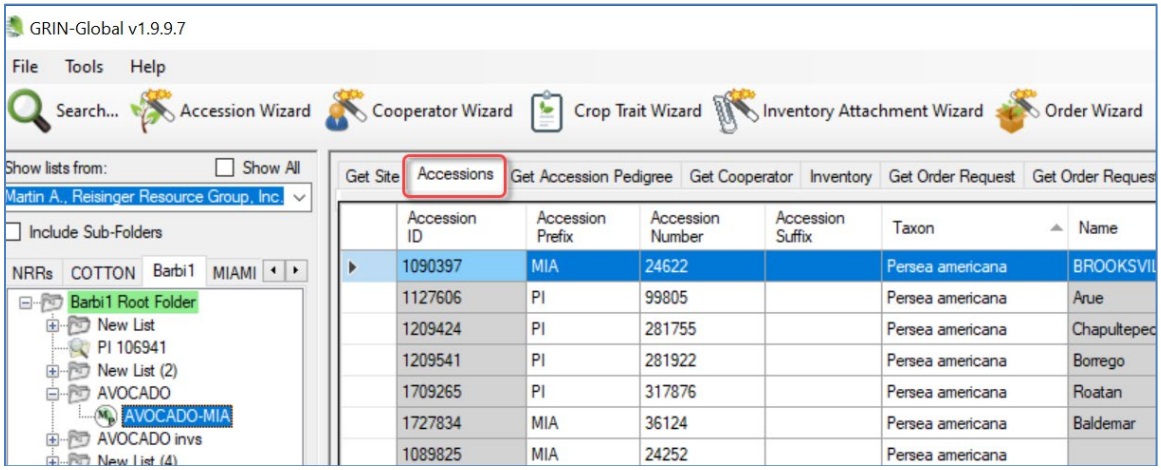
240704	MAR-HOPS	MAR 35 RRG	MAR	35	RRG	CT	NORDGEN	Y	N	Y	Available
240719	Barley_MFL	MAR 35 RRG	MAR	35	RRG	SD	NORDGEN	N	N	Y	Available
240720	MAR-HOPS	MAR 35 RRG	MAR	35	RRG.2	SD	NORDGEN	Y	Y	Y	Available

Practice! Create at least one **Inventory Maintenance Policy** record.
Create several **Inventory** records for your accessions.

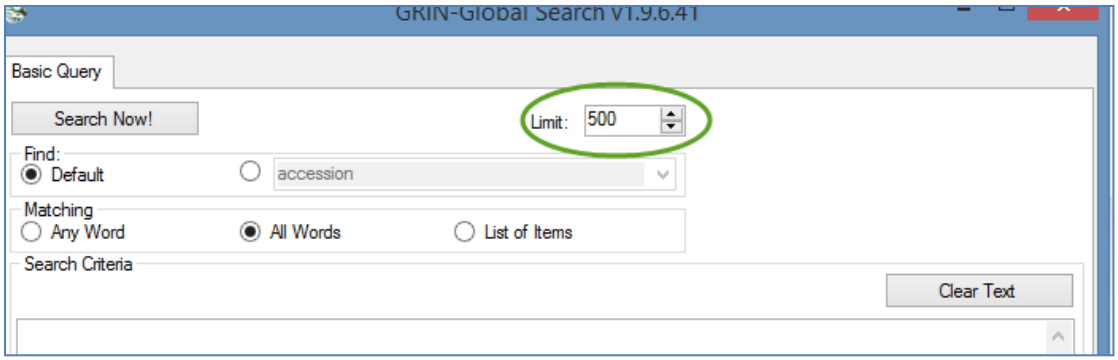
Make a folder. Drag your Inventory Maintenance Policy record to the folder. Then, on the right grid, switch to the accession an then to the inventory dataviews. Note what records are listed.



Accession ID	Accession Prefix	Accession Number	Accession Suffix	Taxon	Name
1090397	MIA	24622		Persea americana	BROOKSVIL
1127606	PI	99805		Persea americana	Arue
1209424	PI	281755		Persea americana	Chapultepec
1209541	PI	281922		Persea americana	Borrego
1709265	PI	317876		Persea americana	Roatan
1727834	MIA	36124		Persea americana	Baldemar
1089825	MIA	24252		Persea americana	

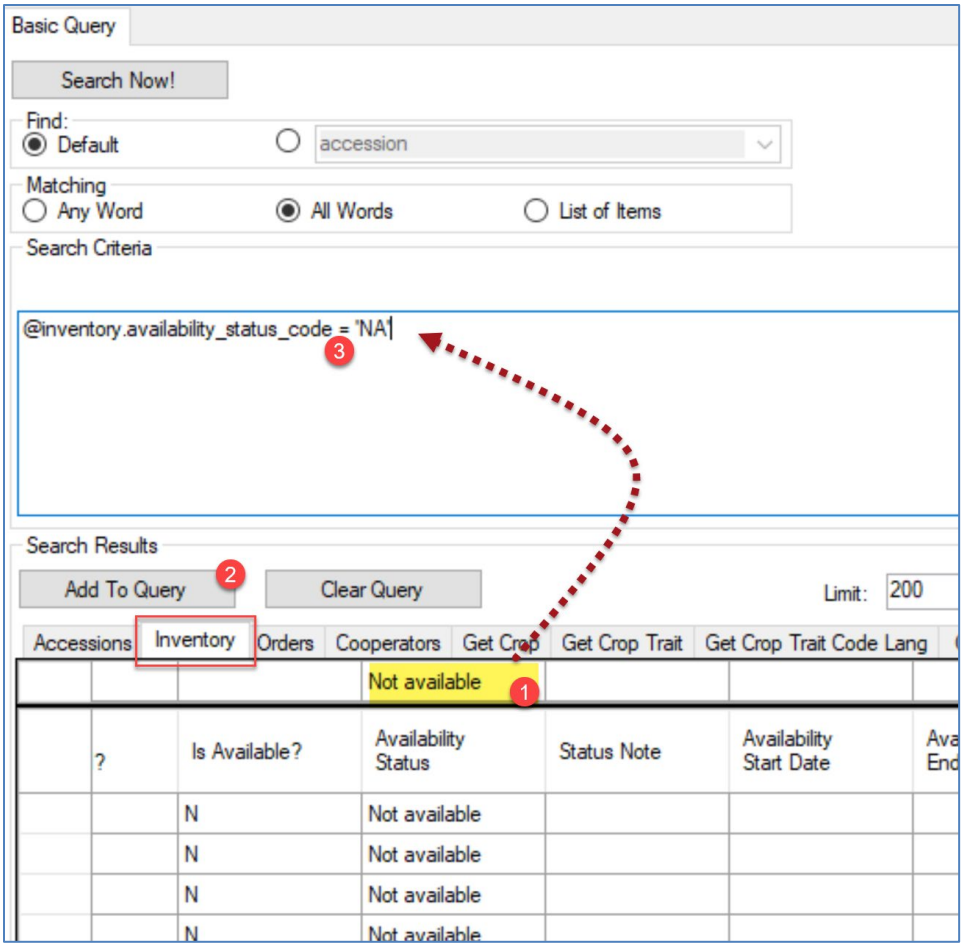
Tip

To expedite your response time, consider setting a Limit of 100 or 500 records before doing the following exercises since this is just practice.

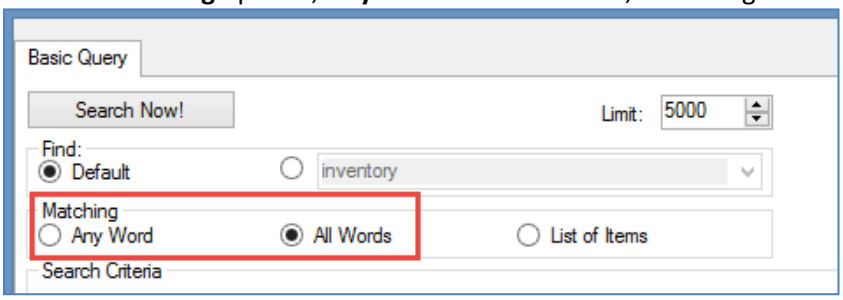


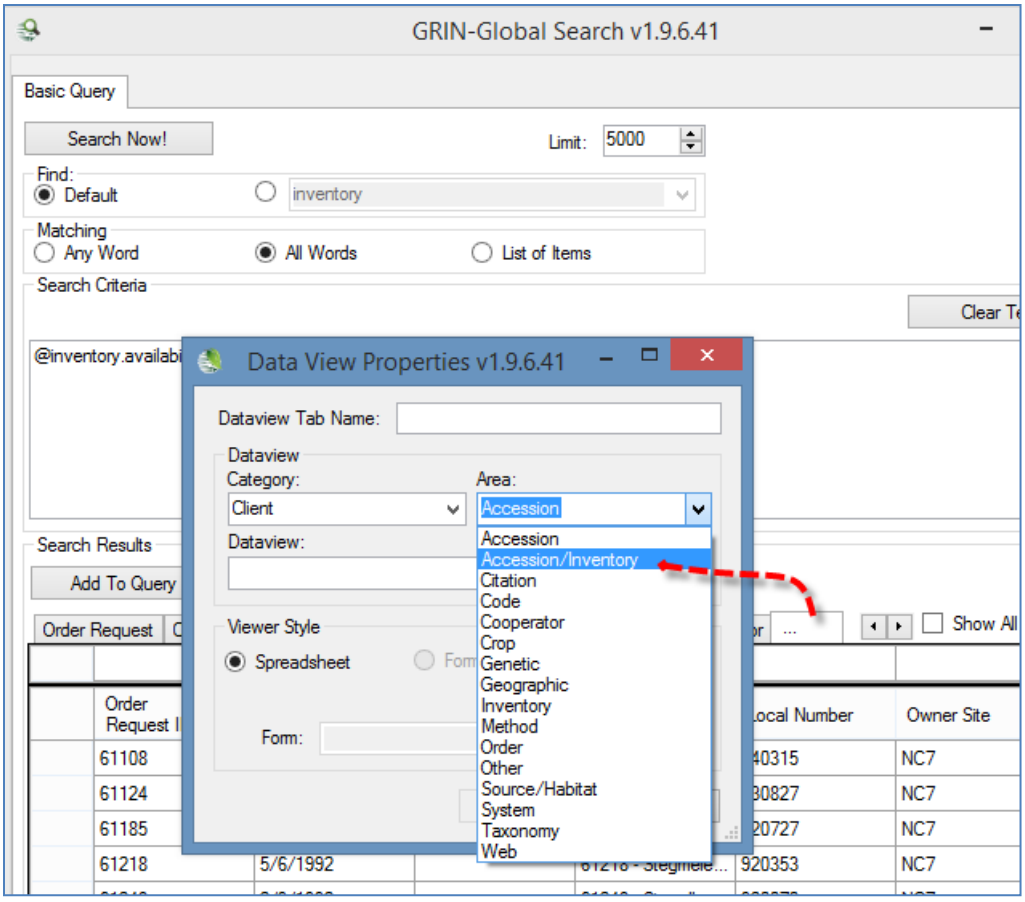
Do the following:

a. Using the **Inventory** tab, use the **Inventory Status** field, and search for records whose status is "Not available."

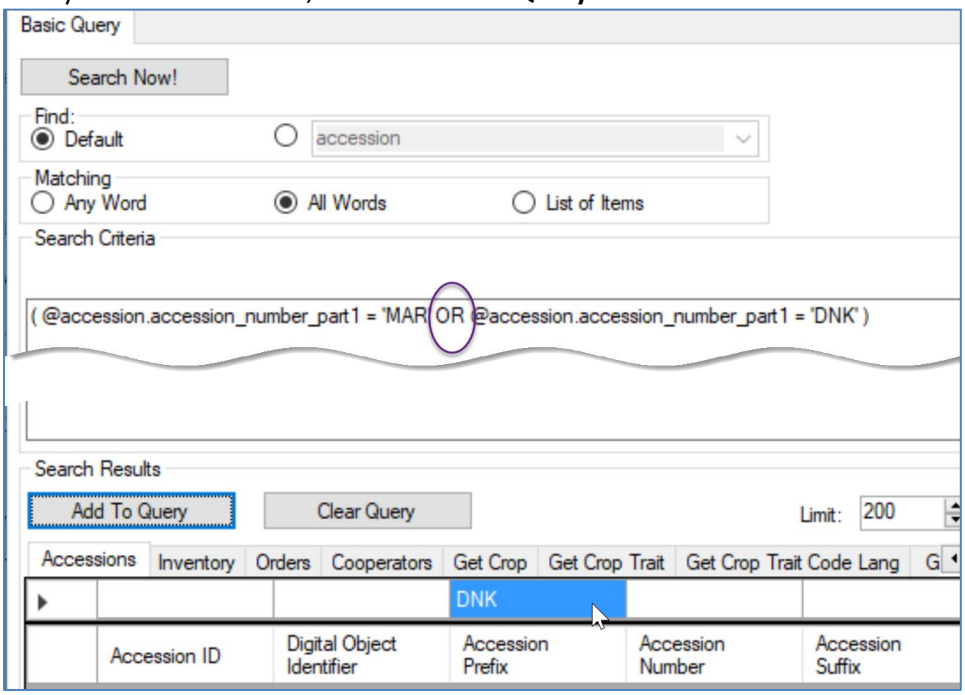


b. Try several different searches using multiple criteria – in different QBE cells. Experiment with the two **Matching** options, **Any Word** and **All Words**, indicating OR and AND conditions.




GRIN-Global Search v1.9.6.41
Basic Query
Search Now!
Limit: 5000
Find:
Default
inventory
Matching
Any Word
All Words
List of Items
Search Criteria
Clear Te
@inventory.availabi
Data View Properties v1.9.6.41
Dataview Tab Name:
Dataview
Category:
Client
Area:
Accession
Dataview:
Viewer Style
Spreadsheet
Form:
Accession
Accession/Inventory
Citation
Code
Cooperator
Crop
Genetic
Geographic
Inventory
Method
Order
Other
Source/Habitat
System
Taxonomy
Web
Search Results
Add To Query
Order Request
Show All
Order Request I
Local Number
Owner Site
61108
40315
NC7
61124
30827
NC7
61185
20727
NC7
61218
5/6/1992
920353
NC7

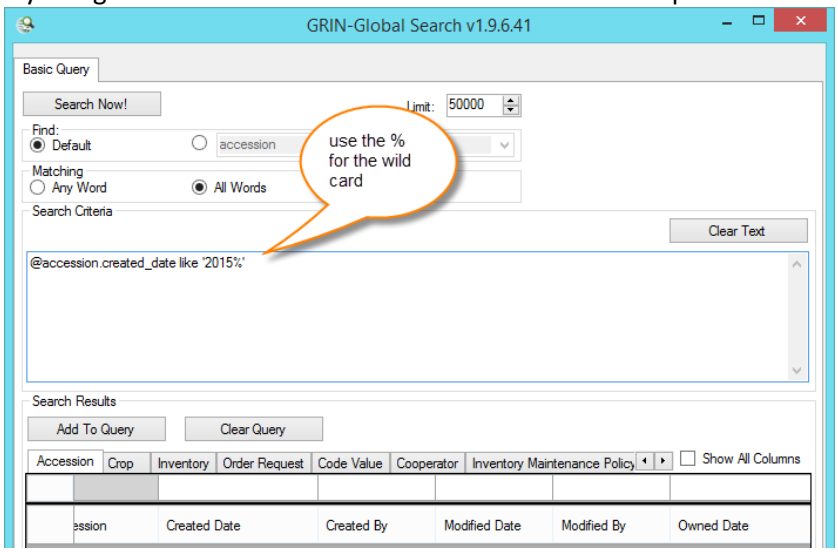
c. Try several different searches using multiple criteria – in the *same* QBE cells. To do that, each time you enter a criterion, click the **Add to Query** button.



d. (The server is using Microsoft's SQL Server database. The following is true for dates in this environment.)

Use '2015% to find 2015 records. Note that you must end the search string with a wildcard, because the date fields also store time in the field.)

Try using wildcards in at least one date search. For example:



Best query is in the format: **YYYY-MM-DD** (Trailing wildcard is required or the query will fail.)

No other date formats are supported. So the following are valid searches:

@accession.created_date like '2015%'
@accession.created_date like '2015-09-%'
@accession.created_date like '2015-09-05%'
@accession.created_date like '2015-%-05%'

For consistency, time is converted to Greenwich Mean Time (GMT). For example, records added on the East Coast at 10 pm may be found showing the next day's date.

Extra Exercise: Dynamic Folders

Practice making several dynamic folders. Refer to the online document *Dynamic Folders* https://www.grin-global.org/docs/gg_dynamic_folders.docx for complete details and examples (which you can copy and paste into the Search Tool).