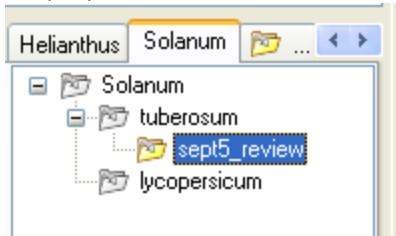**Korean Workshop (Presentation / Walk-throughs)**

Introduction to GRIN-Global Curator Tool Interface

Demonstrate / Discuss:

- Start up GRIN-Global

- Discuss: Interface: left: List Panel / right side: Data Grid
  - List Panel (Compare to a Windows Explorer window)
    - similar to MS Explorer – "tree view" with folders
    - Curator Tool (CT) can have an infinite number of tabs & lists
    - lists contain items – pointing to records in the database
    - deleting the lists or items in the lists does not delete the actual DB records
  - Data Grid (Demo)
    - similar to a spreadsheet – columns & headings, data in rows,
    - columns can be re-sized
    - columns can be moved – drag a column left
    - Demo: Use column chooser to select / deselect columns

- Search
  - begin discussion about searching for records (Solanum) lycopersicum (tomato) & tuberosum (potato)
  - discuss: Search as a separate program (therefore need to login in again) (also not fully implemented yet – advance search functions not enabled)
  - … basic search works similar to a Google search
  - … there are five sets of options available on the basic search feature:
    - Ignore Case
    - Areas to Search
    - Show Results As
    - Results Matching On
    - Max Records
  - Demo: searching for Solanum (dev1 found 422 records)

- Filtering & Sorting
  - Discuss / demo sorting and filtering
    - sorting: use Taxonomy column – sort Ascending (**right-click** on heading); scroll to show alpha order
    - filtering: click in the taxonomy cell of a Solanum tuberosum - **right-click** …show only rows with this data
    - point out record counter in lower left of screen:… Showing 27 rows (of nnn retrieved)
    - filter again on another column: select Cultivars
    - need to set up a list if we are going to track these accessions…

- Demo: create a new tab: e.g.   Solanum

- Demo: create first level list to match: Solanum
  (recommended: same Tab name and Highest Level List under the Tab should be the same name
  -- aids with list rearranging, deleting, etc.)

- Demo: create two sub-lists under Solanum: tuberosum (potato)
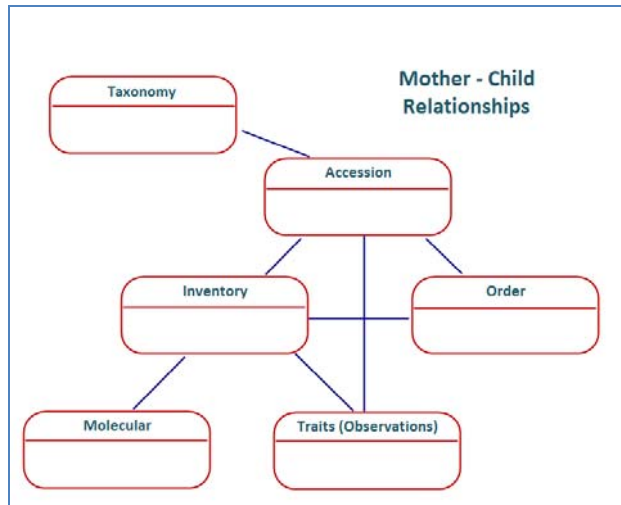 & lycopersicum (tomato)

- Discuss: can use the lists (and sub-lists) to track records by some criteria: traits, habitat, origin

Using Lists to Organize Your Accessions

With the Curator Tool, you can build and arrange lists to meet your specific needs. For instance, lists
could be used to organize accessions by:
  - recently added inventory
  - specimen location: field, shelf, etc.
  - utility patents
  - group (e.g., common pears vs. wild pears)
  - sources, such as material from overseas

- Dragging data from the Search window to the CT
  - setting up: have both screens visible / search on top
  - demo selecting some records (click on row headings: use Ctrl and/or Shift to select
    multiple rows); show select all (click on top, left corner of grid)
  - drag all of the selected records from the Search grid to the CT's list (use the sub-list
    such as the sept5_review illustrated above
  - deselect additional blank columns in the CT to show that feature again

- Lists: demo / discuss
  - the highlighting of the list vs. an item in the list
  - select *one* record in the data grid – the accession record is in bold
  - deleting an item in the list is not deleting the db records – just that your list no longer
    points to that db record
  - select Inventory Tab – discuss the fact that the related Accession record in the list (in the
    List Panel) is underlined and italicized (and is the "mother" of the related inventory
    records)

    Discuss:

- o Show also Order records: e.g. Solanum PI527926 has 3 associated Order records
- o Discuss:

- Exporting to Excel
  - o Demo: drag some records into Excel
  - o Demo: Copy & Paste records into Excel

- Importing into the Curator Tool from a spreadsheet – *Modifying Existing Data*
  - o Demo: Updating Inventory from Excel
  - o Must be in edit mode in the CT
  - o Both the CT and Excel must be active
  - o Demo a "block copy"
  - o To be safe (& quick), you can have already in Excel (or copy into excel) some inventory data.
  - o Discuss manipulating the Excel data – to get the data into adjacent columns so that in on copy you can copy into the CT. In Excel, arrange the **Inventory ID** and **Quantity on Hand** columns to be adjacent.

    Change the quantities. Drag into the CT Data Grid (no audible signal, but visually you will see cells in yellow where data has been changed.) Save.
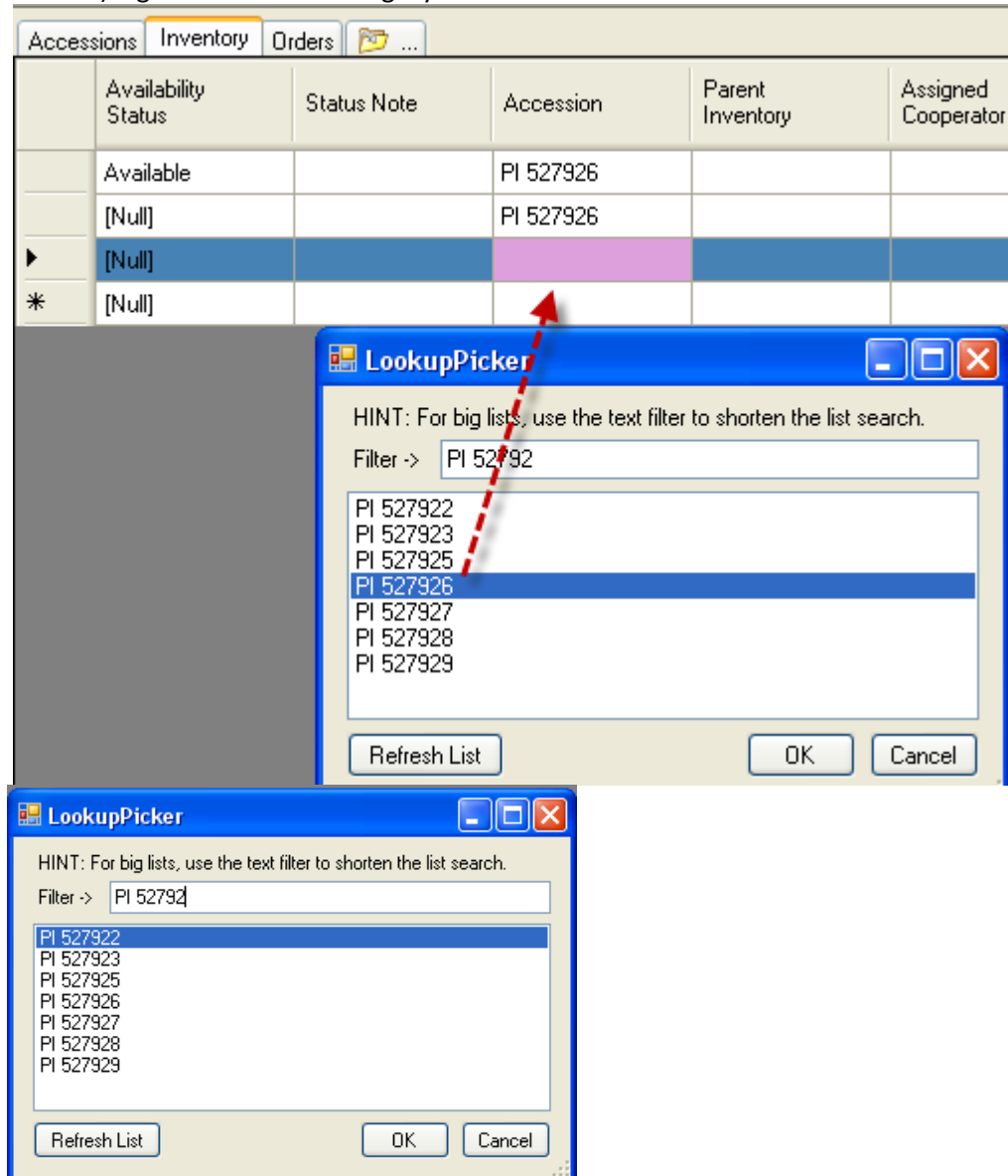 - o Discuss: security will be established so that you can only alter records "that are yours"

- Importing into the Curator Tool from a spreadsheet – ***Adding New Records***
  - Do a similar block copy, but add a new record in Excel. Just need Quantity on Hand for this demo
  - Drag into the CT. Note: Inventory ID, the key, will be assigned)

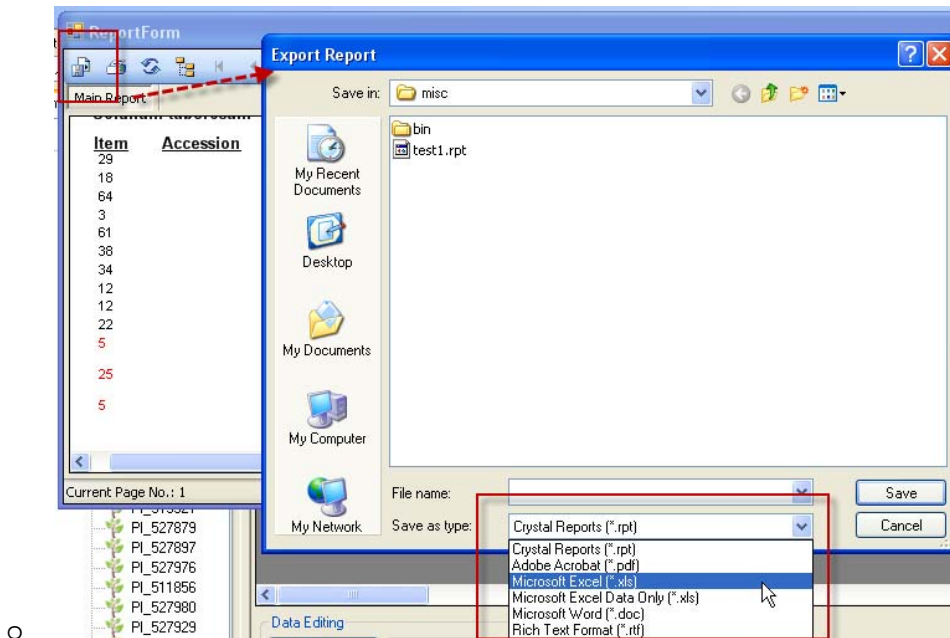| B	C	D
Inventory ID	Quantity On Hand	Inventory Prefix
51504	950	PI
1686082	1456	PI
	2134	PI

  - Discuss the colors when in Edit mode:
    - violet -- required / light blue & dark blue -- data can be entered / gray – supplied by the system
  - Demo: a Drop Down … click in the Inventory Type field for the new blank record; select SD (seed) (drop downs will eventually display visual indicators)
    (two types of drop downs: in Inventory (in Edit), see Distribution Form vs. Accessions columns)

- o Demo: Click in the Accession cell: the LookUp Picker will open (only certain data allowed) – guarantees data integrity – use this to select the correct Accession

- • Demo: Adding New Records by Inputting
    - o Demo: show adding a new record manually (must be in Edit mode)
    - o briefly discuss keys: for Inventory, the Inventory ID key is the primary key (primary key always the leftmost column);   the next four fields in the Accession Table are the alternate key (no dups allowed, so when the combination of the four fields must be unique)

- Demo: Reports -- *Displaying*
  - Discuss: adding a data view: **Get Order Items**
    (this data will be needed for the currently available reports)
  - reports are currently generated by Crystal Reports
  - ***must select records first*** (select all for the demo; otherwise only the first record is reported)

- Demo: Reports -- *Exporting*
  - must be in the Report From window; select the first icon / different data formats available …

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- Discuss Admin Issues
  - Discuss: Installation

  - Discuss:

  -
- Discuss Project Timelines
  - Discuss:…