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

Discuss:

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

- Importing into the Curator Tool from a spreadsheet – *Modifying Existing Data*
  - Demo: Updating Inventory from Excel
  - Must be in edit mode in the CT
  - Both the CT and Excel must be active
  - Demo a “block copy”
  - To be safe (& quick), you can have already in Excel (or copy into excel) some inventory data.
  - 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.

<table>
<thead>
<tr>
<th>B</th>
<th>C</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Inventory ID</strong></td>
<td><strong>Quantity On Hand</strong></td>
</tr>
<tr>
<td>51504</td>
<td>950</td>
</tr>
<tr>
<td>1686082</td>
<td>1456</td>
</tr>
</tbody>
</table>

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.

- 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

<table>
<thead>
<tr>
<th>B</th>
<th>C</th>
<th>D</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Inventory ID</strong></td>
<td>Quantity On Hand</td>
<td>Inventory Prefix</td>
</tr>
<tr>
<td>51504</td>
<td>950 PI</td>
<td></td>
</tr>
<tr>
<td>1686082</td>
<td>1456 PI</td>
<td>2134 PI</td>
</tr>
</tbody>
</table>

- 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)
Demos:

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

![LookupPicker](image)

- Demo: Adding New Records by Inputting
  - Demo: show adding a new record manually (must be in Edit mode)
  - 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
  o Discuss: adding a data view: Get Order Items
    (this data will be needed for the currently available reports)
  o reports are currently generated by Crystal Reports
  o must select records first (select all for the demo; otherwise only the first record is reported)

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

• Discuss Admin Issues
  o Discuss: Installation

    o Discuss:

    o

• Discuss Project Timelines
  o Discuss:...