Cooperator Records



Revision Date

November 28, 2023

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Comments/Suggestions

Please contact Marty Reisinger at either marty.reisinger@ars.usda.gov or [mar@rrginc.com](mailto:mar@rrginc.com) with any suggestions or questions related to this document.

|  |  |
| --- | --- |
| image2449.png | 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.

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.

|  |  |
| --- | --- |
| image2449.png | 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

|  |  |
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| SNAGHTML7042f2e | * *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” and by simply stating “cooperator records” when speaking of GRIN-Global standard cooperator records.

###### Web Cooperator Records

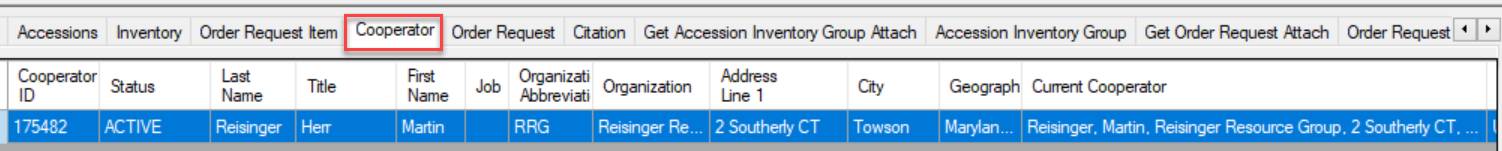
A user on the GRIN-Global public website has an opportunity to self-register – during this registration process the user’s contact information is stored in a *web* cooperator record. This web cooperator record is not the same thing as the GG cooperator record. (It will get converted into a cooperator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

A web user can indicate multiple shipping addresses and indicate which is the default address. These shipping addresses are stored in their own table which directly relates to the web cooperator table.

|  |  |
| --- | --- |
| image2449.png | 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 are records containing data on individuals and 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:  


|  |  |
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| image2449.png | When the GG database administrator adds a genebank staff person as a Curator Tool user, a GRIN-Global cooperator record is automatically generated for that person. |
| image2449.png | Whenever working with, or searching for cooperators or web cooperators, we recommend that you update the cooperator lookup tables. |
| image2449.png | For various reasons, the cooperator table may have duplicate records for the same person or organization. The [*Merging “Dups” to become One ACTIVE Coop*](#duplicates) 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:

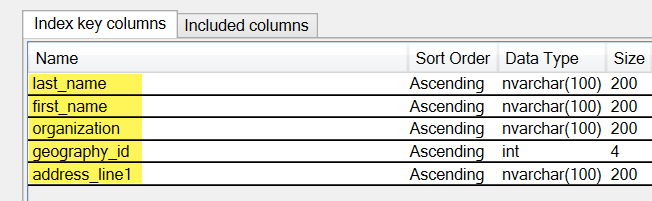
* Web Cooperator
* Cooperator
* Cooperator (Big)

###### Why three cooperator lookup tables?

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

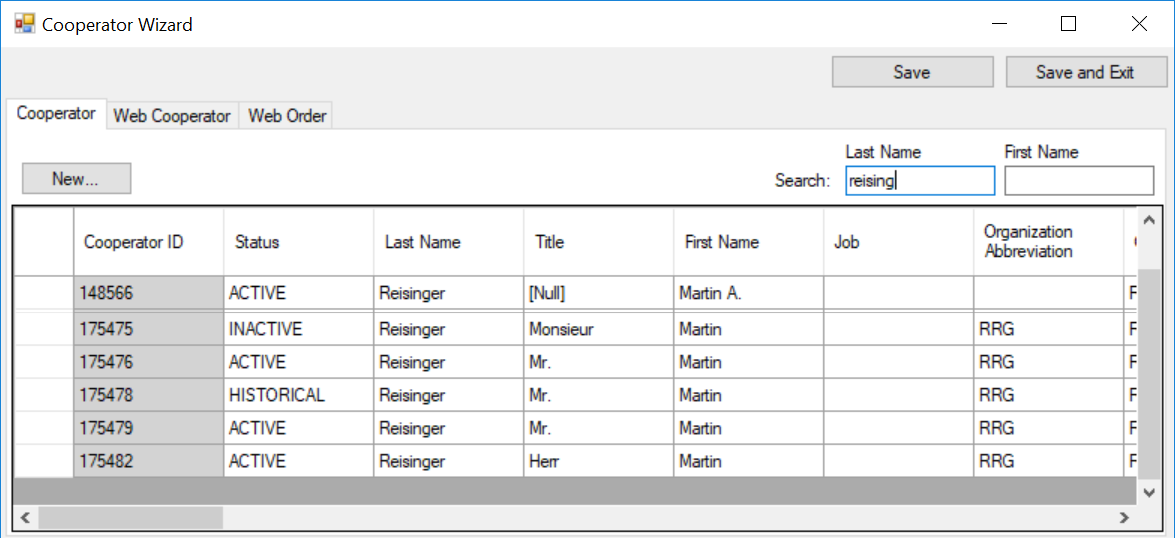
The “Cooperator” lookup has a display field formed by cooperator last name, first name, and organization. It is a simple string used as a lookup on the GG records’ audit fields such as owned\_by. It doesn’t need to be too defined because it is used for displaying which curator owns a record.

The “Big Cooperator” lookup includes five fields in the display string so that curators can distinguish public cooperators with similar names. That lookup is used when the cooperator is used in a field such as original requestor or source donor. You need more detail there, hence the Big Cooperator lookup is. This is the lookup table that a Curator Tool user is typically using when the user is adding a cooperator to a field.

The Big Cooperator lookup uses five fields:  


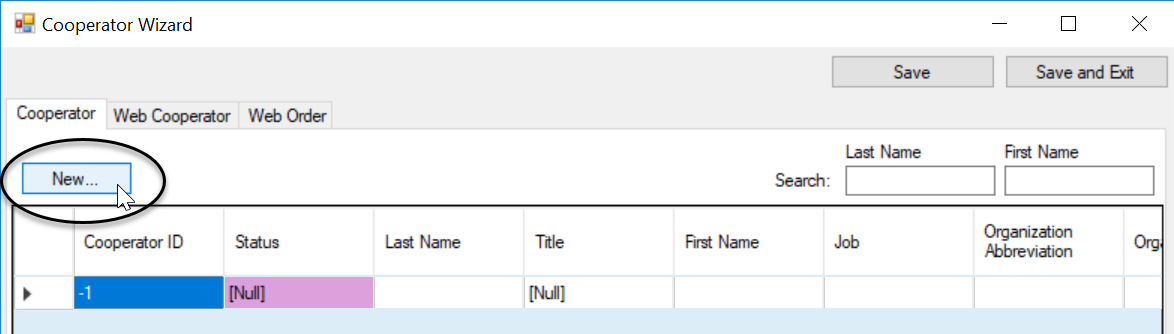
|  |  |
| --- | --- |
| image2449.png | When searching the Lookup Picker for an organization cooperator, if you enter a comma, space, comma, space – before the text, you will bypass the individuals. If you prefer, you can also start with the % wild card, but individuals may be listed as well.  In the 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.) |
| A picture containing light, drawing  Description automatically generated | 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 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”:  


|  |  |
| --- | --- |
| **image2449.png** | Always search the database with 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. |

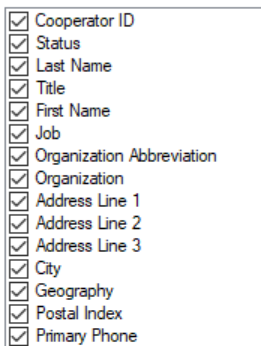
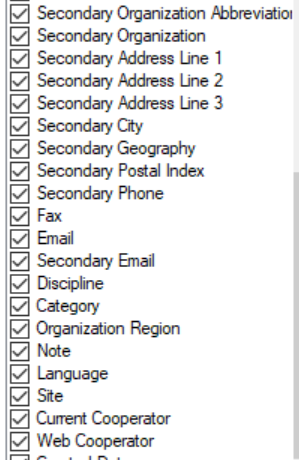
##### Creating a New Cooperator Record

The cooperator wizard is fairly 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.

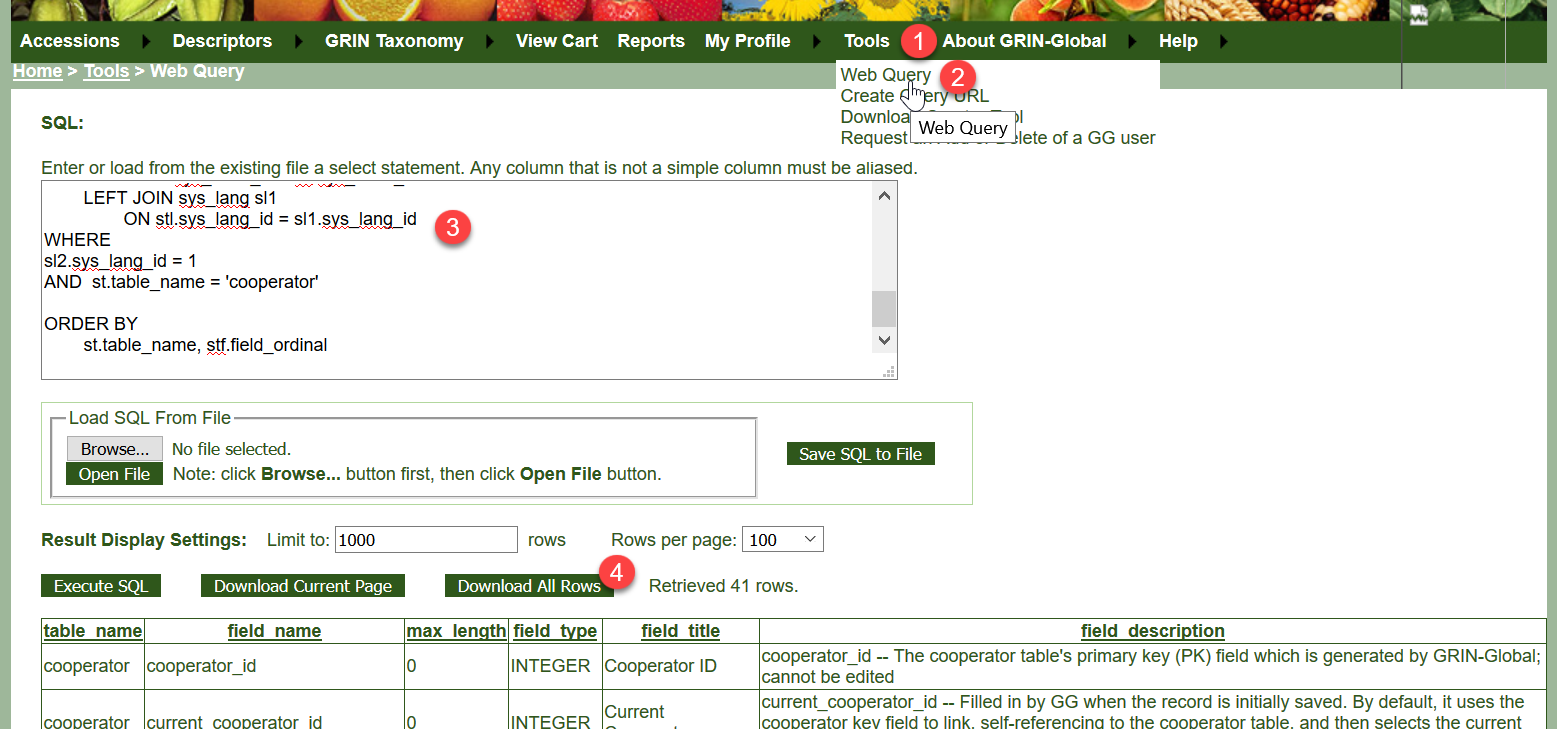
##### Status Codes

|  |  |
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| image2449.png | The **Status** field uses a code from the **COOPERATOR\_STATUS** Code Group.  In the NPGS, the current codes need to be evaluated. Most likely, the Historical and the Deceased codes will be dropped, or further guidance needs to be established. Other than Active, these are the counts as of May, 2019:  • Historical – 560  • Inactive – 2805  • Deceased – 3 |

##### Fields Defined

These fields are documented in the online GG dictionary at [https://docs.google.com/spreadsheet/ccc?key=0AvdWZS-UqEE7dHFaRnRsR1RxOUx0em9KZmhNZTVlRnc&hl=en#gid=2](https://docs.google.com/spreadsheet/ccc?key=0AvdWZS-UqEE7dHFaRnRsR1RxOUx0em9KZmhNZTVlRnc&hl=en%23gid=2)

You can also run a SQL query in the Public Website to display the table’s definitions when you are logged in and if the GG database administrator has linked your Public Website account to your Curator Tool account. Sample SQL is shown below:

You must be logged in and your PW account is tied to your CT account.  


##### 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

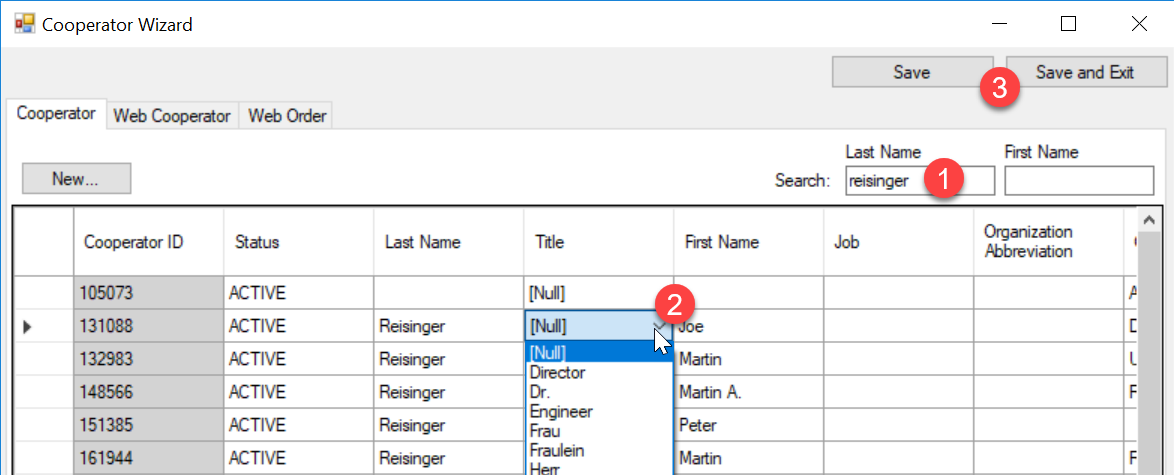
AND st.table\_name = 'cooperator'

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.)  


When using the Search Tool, move the record into the Curator Tool, and then use the Cooperator dataview to edit.  
Graphical user interface, text, application, email

Description automatically generated

##### “Super” Cooperator Editors

|  |  |
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| A picture containing light, drawing  Description automatically generated | 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 COOOPERATOR table. This is especially handy when an organization running GG has multiple sites. (Remember, only one owner per record.) In a multiple site situation, it can become 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: |

##### 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

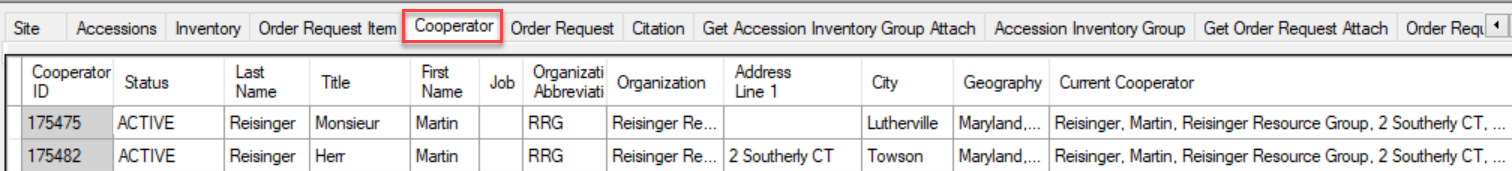
You can delete a cooperator record in the Wizard, or in the cooperator dataview, using the standard method for deleting any record in the Curator Tool. (One method: select the record(s); then use the Delete key.)

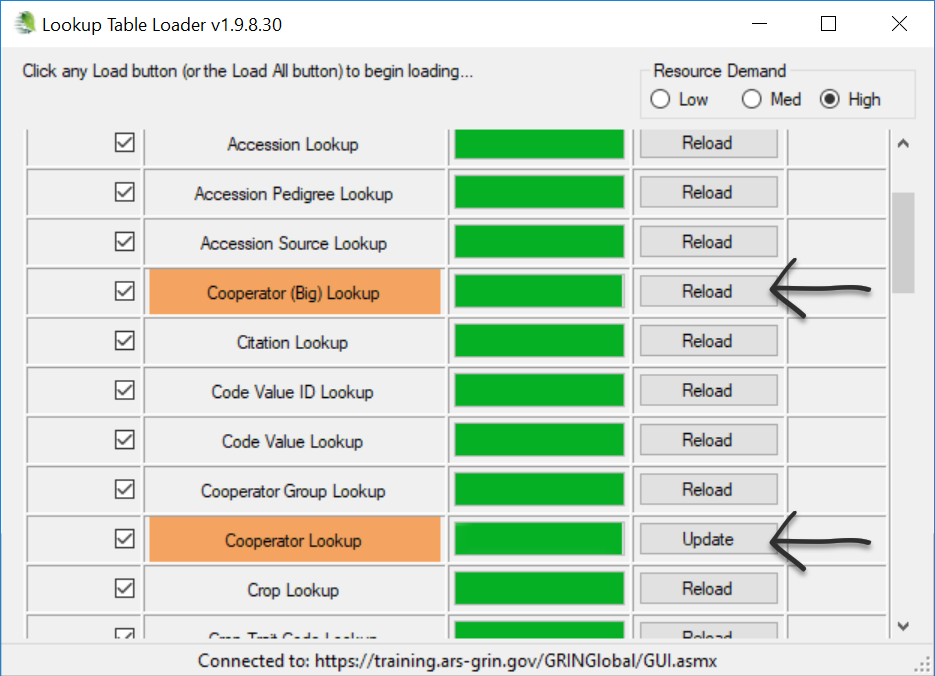
|  |  |
| --- | --- |
| image2449.png | A cooperator record cannot be deleted if it is used elsewhere. For example, if an **accession\_source\_cooperator** record uses that cooperator record, you will not be able to delete the cooperator unless you first delete the **accession\_source\_cooperator** record that links to the cooperator. |

#### Merging “Dups” to become One ACTIVE Coop

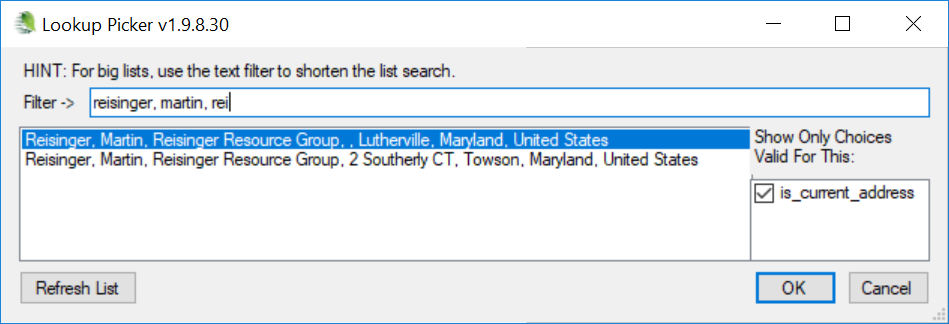
Issue: Two coop records in the database exist for the same person. Both are active records. The goal is to make one INACTIVE, and then have the INACTIVE record link to the active one.

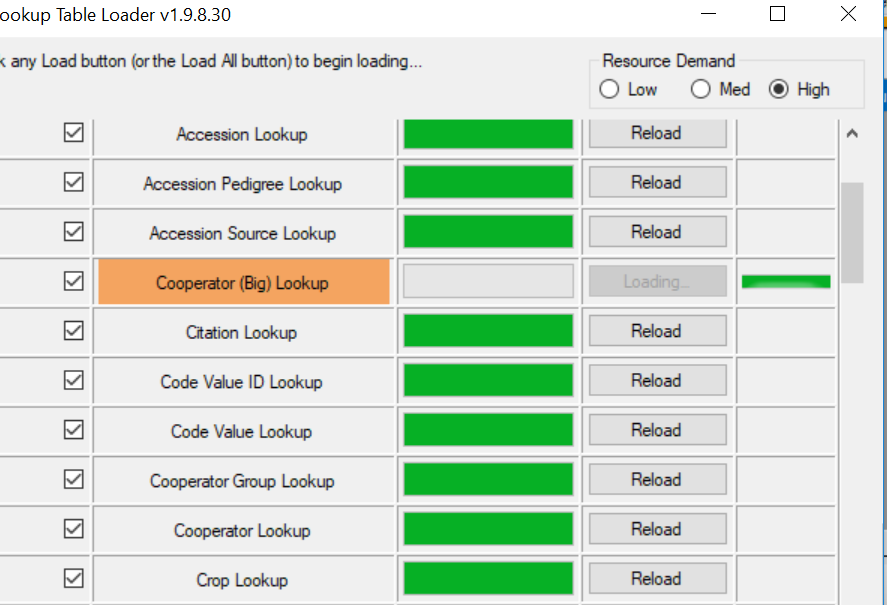
This will result in pooling together any accessions received, collected, or donated by the same person to be tallied correctly on the Public Website. It will also result in having only one cooperator record display for that person in the Lookup Picker for any field that uses the cooperator(big) lookup. 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.   


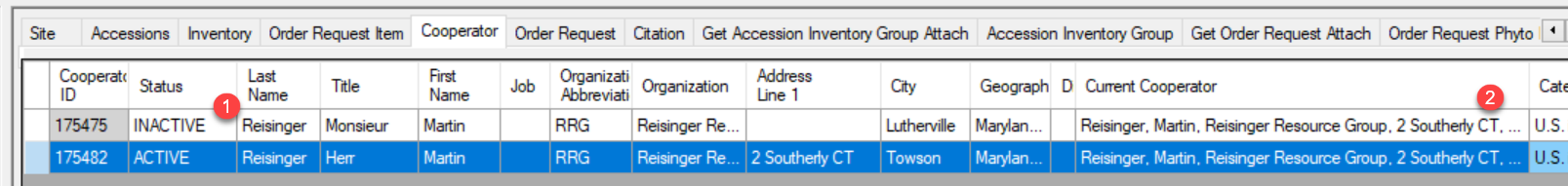
The coop Lookup tables are not current (not unexpected). What is strange – one indicates “Reload,” whereas the other “Update.”  


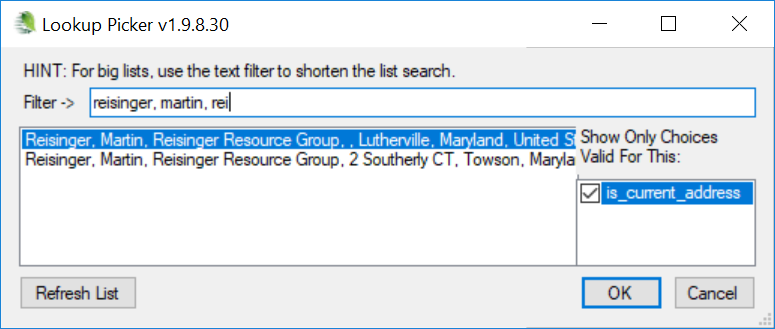
In any case, both should be “refreshed/Updated/Reloaded/whatever.” The table we are primarily interested in the Big Coop.

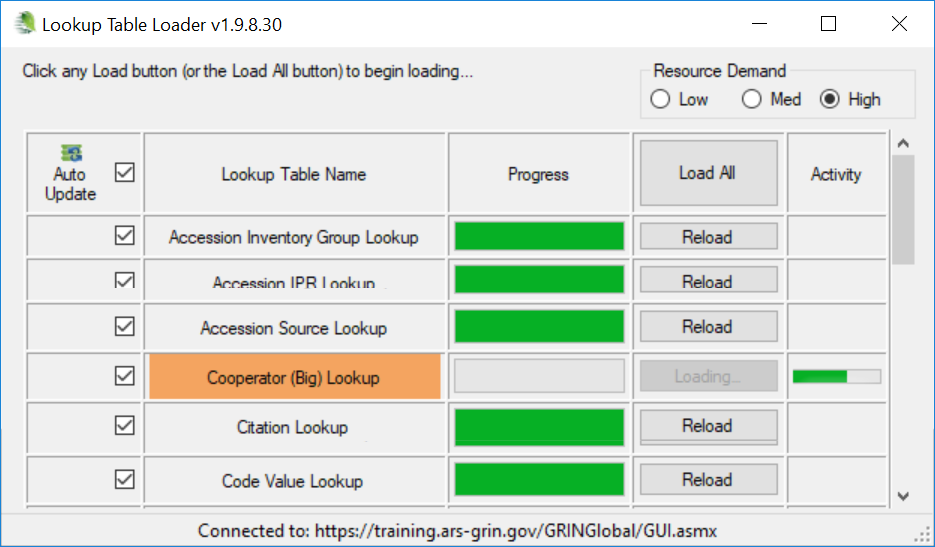
When adding a cooperator for accession source coop, both display in the lookup. 

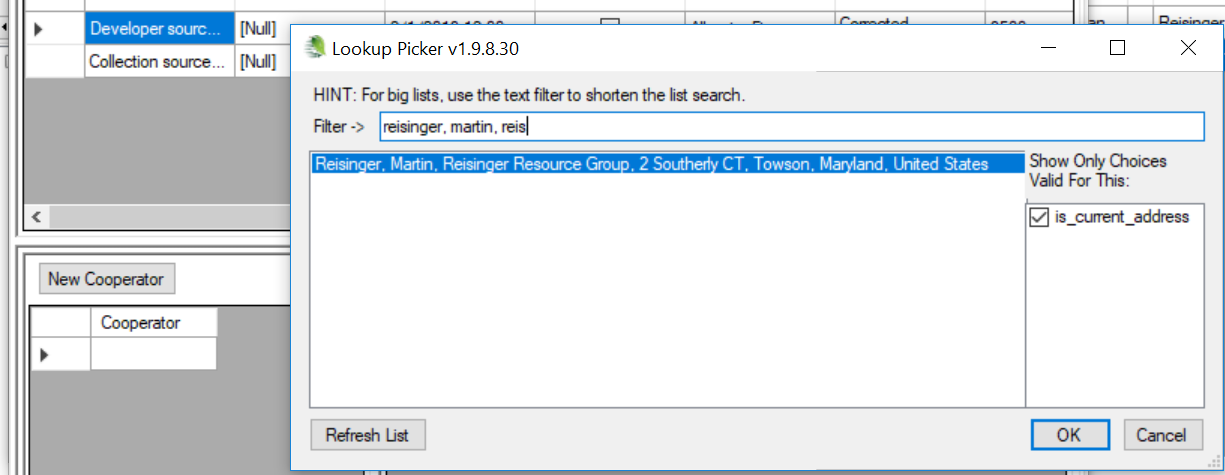
What is displayed in the Current Cooperator field is from the lookup **big\_cooperator\_lookup**. Sometimes the Big Cooperator Lookup table must be completely reloaded.  


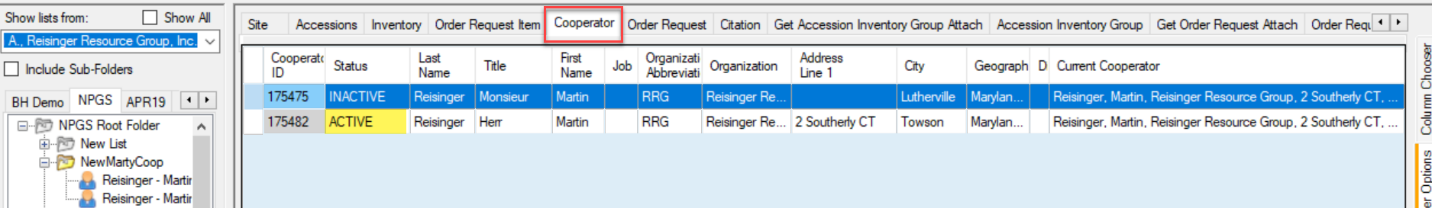
I edited the old record and made two changes:

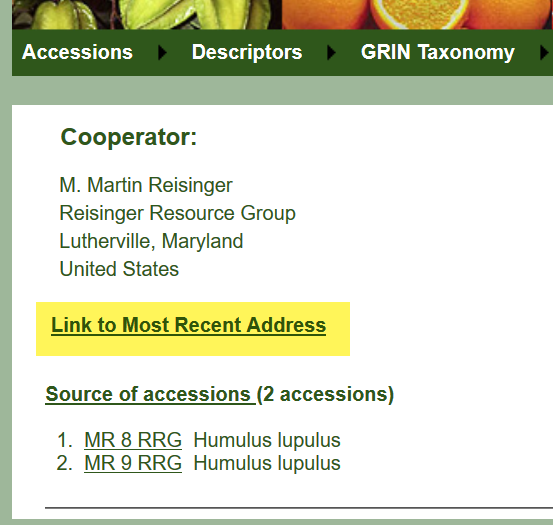
1. Changed status to INACTIVE for **175475** (the older coop record)
2. Changed 175475’s **Current Cooperator** to match the **Current Cooperator** of the new record (ID # 175482)  
   

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:  


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


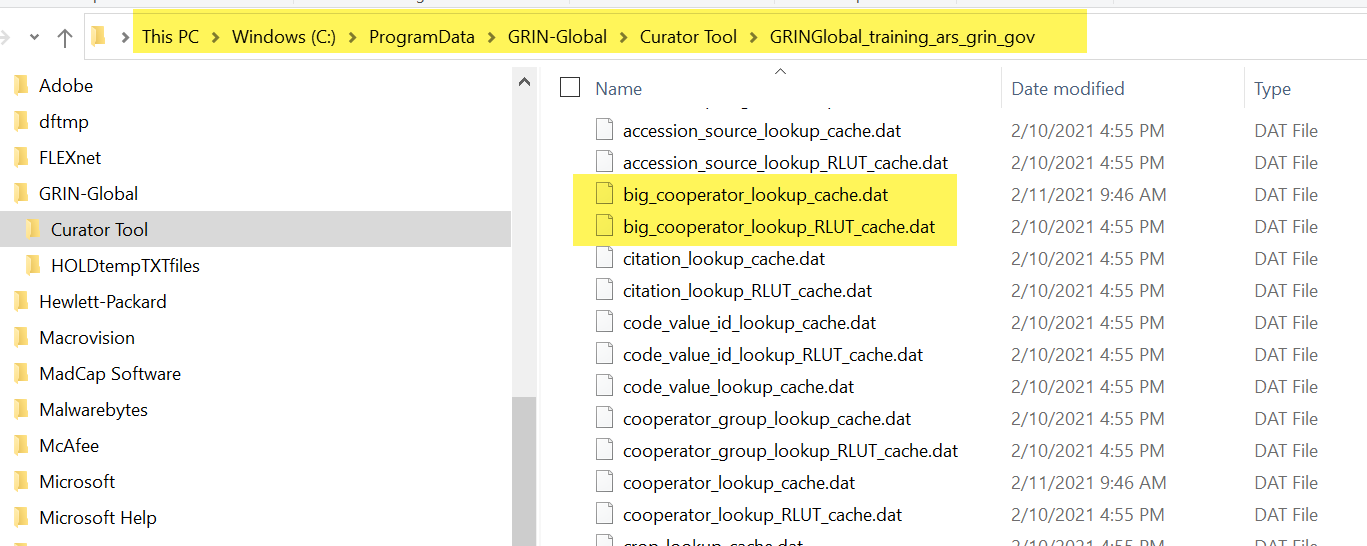
Now when I search for a coop when adding a cooperator to an accession source coop field, with the **is\_current\_address** checked, I see only one coop – the ACTIVE coop. I select that cooperator to fill in the Current Cooperator field:  


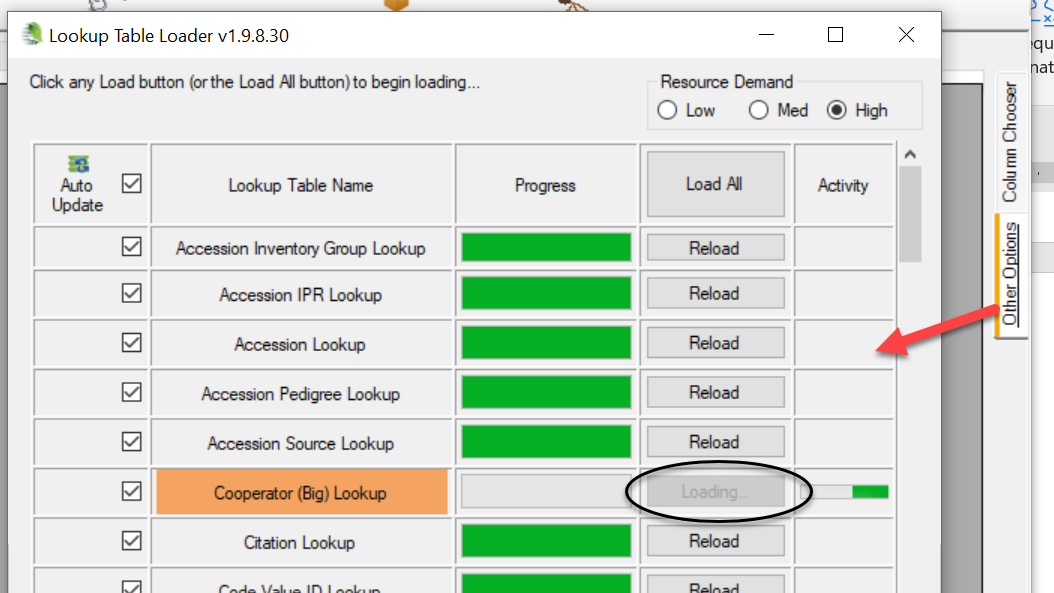
The ultimate goal is reached: the two coop records are “tied together.” The inactive record uses the lookup value of the newer ACTIVE record:  




### 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

– 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.