

**Technical Committee****TC/58/13****Fifty-Eighth Session  
Geneva, October 24 and 25, 2022****Original:** English  
**Date:** October 6, 2022**WEB-BASED TG TEMPLATE***Document prepared by the Office of the Union**Disclaimer: this document does not represent UPOV policies or guidance***EXECUTIVE SUMMARY**

1. The purpose of this document is to report developments on the web-based Test Guidelines template (web-based TG template).

2. UPOV has developed the web-based TG Template (see: <https://www3.wipo.int/upovtg/>) to implement the guidance for drafting Test Guidelines provided in document TGP/7 "Development of Test Guidelines". A collection of characteristics, with their corresponding states of expression, which have already been approved for inclusion in existing Test Guidelines after the adoption of document TGP/7 ("approved characteristics"), is provided in the web-based TG template.

3. The TC is invited to note that:

(a) the interviews to collect requirements and development of the new functionalities for version 2 of the web based TG template will start in 2023;

(b) the web-based TG template and database of approved characteristics are currently being migrated to cloud servers, including an upgrade to new technologies in infrastructure and program to address issues reported by users and enabling use for drafting individual authorities' test guidelines; and

(c) training on the web-based TG template can be organized upon request.

4. The following abbreviations are used in this document:

TC: Technical Committee  
 TG: Test Guidelines  
 TWO: Technical Working Party for Ornamental Plants and Forest Trees  
 TWPs: Technical Working Parties

5. The structure of this document is as follows:

EXECUTIVE SUMMARY.....	1
DEVELOPMENT OF INDIVIDUAL AUTHORITIES' TEST GUIDELINES.....	2
Identification of requirements for Version 2 of the web-based TG template .....	2
MIGRATION TO CLOUD SERVERS .....	2
ADDITIONAL FUNCTIONALITIES.....	3
Summary of example varieties used in a particular Test Guidelines .....	3
Tracing of changes implemented in Test Guidelines .....	3
TRAINING .....	3
Guidance for users of the web-based TG template .....	3

## DEVELOPMENT OF INDIVIDUAL AUTHORITIES' TEST GUIDELINES

6. Version 1 of the web-based TG Template was designed for the development of Test Guidelines for UPOV. However, it has also been designed such that Version 2 will enable members of the Union to use:

- (a) adopted UPOV Test Guidelines as a basis for the development of individual authorities' test guidelines;
- (b) the web-based TG Template and database of characteristics to develop individual authorities' test guidelines for which there are no UPOV Test Guidelines; and
- (c) use individual authorities' test guidelines, developed using the web-based TG Template, as the basis for draft UPOV Test Guidelines.

7. Version 2 will have a feature for individual authorities to modify the template wording, within the same structure, to act as a template for their own test guidelines and a feature to allow individual authorities to convert UPOV Test Guidelines into individual authorities' test guidelines, with necessary modifications.

Identification of requirements for Version 2 of the web-based TG template

8. Version 2 of the web-based TG template will be developed on the basis of requirements from individual authorities for developing their test guidelines.

9. On November 11, 2021, the Office of the Union issued Circular E-21/225 inviting members and observers in the Technical Committee and Technical Working Parties to express their interest to participate in interviews on the use of the web-based TG Template for the development of individual authorities' test guidelines.

10. The following members and observers expressed their interest to participate: Australia, Brazil, Canada, China, Dominican Republic, Kenya, Netherlands, New Zealand, Peru, Poland, Republic of Korea, Spain, United Kingdom, United Republic of Tanzania, United States of America, Viet Nam and Zimbabwe.

11. Interviews with members of the Union and observers will be conducted in 2023 to explore how test guidelines are developed and used by each member or observer.

*12. The TC is invited to note that, interviews to collect requirements and development of the new functionalities for version 2 of the web based TG template will start in 2023.*

## MIGRATION TO CLOUD SERVERS

13. The web-based TG template and database of characteristics are currently being migrated to cloud servers. The migration will be completed by 2023 and includes an upgrade to new technologies in infrastructure and program to address issues reported by users.

14. The current rich text editor (RTE) tool will be replaced to allow users to "drag and drop" images. The new RTE will also allow adjusting the size of images.

15. The files exported from the web-based TG template in Word format will be improved, in particular for tables and image sizes. The new RTE will enable a preview of the final format for tables and images.

16. The migration to cloud servers will also replace the current login technology by WIPO accounts. Existing web-based TG Template accounts will be migrated to WIPO accounts. Further information will be provided to web-based TG Template users once the migration is completed.

17. *The TC is invited to note that the web-based TG template and database of approved characteristics are currently being migrated to cloud servers, including an upgrade to new technologies in infrastructure and program to address issues reported by users and enabling use for drafting individual authorities' test guidelines.*

## ADDITIONAL FUNCTIONALITIES

### Summary of example varieties used in a particular Test Guidelines

18. Document TGP/7 "Development of Test Guidelines", Guidance Note 28 "(Chapter 6.4) – Example varieties", 2.2 "Minimizing the number" explains that:

"For practical reasons it is recommended to choose the overall set of example varieties for the Test Guidelines in a way that all the desired characteristics and states of expression are covered by the minimum total number of example varieties. This means that, if possible, each example variety should be used for as many characteristics as possible and example varieties should not be used only for one or very few characteristics."

19. A new functionality will be developed in the web-based TG Template to generate the list of example varieties used in the Test Guidelines to assist leading experts in minimizing the number of example varieties needed in Test Guidelines.

### Tracing of changes implemented in Test Guidelines

76. The TWO, at its fifty-fourth session<sup>1</sup>, noted the comment received in advance of the session proposing to facilitate the tracing of comments provided and changes implemented in draft Test Guidelines. The TWO agreed to wait until the changes to the web-based TG template had been implemented before considering whether to propose further action in this regard (see document TWO/54/6 "Report", paragraph 76).

## TRAINING

20. The TC, at its fifty-third session, agreed that training on the use of the web-based TG template should be offered to the TWPs during the preparatory workshops of the session and/or during the discussions on the agenda item "guidance for drafters' of Test Guidelines". The TC agreed that training should also include FAQs and tutorials for users of the web-based TG template (see document TC/53/31 "Report", paragraph 239).

21. A presentation on the web-based TG template was made on April 21, 2021, including a session for questions and answers. The recording is available on the following website: <https://www.youtube.com/user/upov/videos>

22. The Office of the Union provides assistance to individual experts on an *ad hoc* basis via e-mail and virtual meetings, upon request.

### Guidance for users of the web-based TG template

23. Tutorials for the following user roles are available on the web-based TG Template under the link "Tutorials":

- Leading Expert drafting tutorial
- Interested Expert comments tutorial
- Leading Expert checking tutorial

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<sup>1</sup> Hosted by Germany and held via electronic means, from June 13 to 17, 2022



24. The tutorials are also available for download under the following link:  
[http://upov.int/export/sites/upov/tgp/en/tg\\_template\\_tutorial\\_complete.pdf](http://upov.int/export/sites/upov/tgp/en/tg_template_tutorial_complete.pdf)

25. *The TC is invited to note that training on the web-based TG template can be organized upon request.*

[Annex follows]

## FEATURES OF THE WEB-BASED TG TEMPLATE

(Extract from document TC/50/10 "Report on developments in UPOV including relevant matters discussed in the last sessions of the Administrative and Legal Committee, the Consultative Committee and the Council")

The web-based TG Template will be developed in two separate phases in the form of Versions 1 and 2.

Version 1

Version 1 of the web-based TG Template will be fully functional for the development of UPOV Test Guidelines by Leading Experts and will enable Interested Experts to provide comments. Version 1 of the web-based TG Template will be completed in 2016 and a demonstration will be made at the TWP sessions in 2016.

*Features*

The main features of Version 1 are as follows:

- Draft Test Guidelines will be prepared by Leading Experts online via the web-based TG Template
- Fixed template containing all universal standard wording which is appropriate for all Test Guidelines (see document TGP/7 "Development of Test Guidelines", Section 3.1 "The TG Template")
- Options to add Additional Standard Wording (ASW) (see document TGP/7, Section 3.2 "Additional Standard Wording (ASW) for the TG Template")
- Links to Guidance Notes (GN) (see document TGP/7, Section 3.3 "Guidance Notes (GN) for the TG Template")
- A database of characteristics (in English, French, German and Spanish) from Test Guidelines adopted after the adoption of document TGP/7/1 "Development of Test Guidelines" the Collection of Approved Characteristics (adopted in 2004) (see document TGP/7, Annex 4 "Collection of Approved Characteristics").

The database will contain all information from the Table of Characteristics, including states of expression, notes, example varieties, etc. The database can be searched for relevant characteristics and a relevant characteristic uploaded into draft Test Guidelines with subsequent modification as required.

- Comments boxes for Interested Experts to complete online with a facility to view all comments
- Options to produce output in HTML or Word format.
- English only version
- Translators' facility for the Table of Characteristics (Chapter 7)

Characteristics uploaded, unchanged, from the database comprising the collection of approved characteristics will be indicated as not requiring translation. For other characteristics, translators will be able to search the database comprising the collection of approved characteristics and input the required translations. The translation of the other chapters of the Test Guidelines will be provided separately for Version 1.

Version 2

Version 2 of the web-based TG Template will provide the two following additional features:

*Concurrent translation*

In version 2 of the web-based TG Template, the French, German and Spanish language versions of the Test Guidelines will be automatically developed concurrently with the English draft for the standard wording, Additional Standard Wording (ASW) and characteristics uploaded, unchanged, from the database comprising the collection of approved characteristics. Text that has not been automatically translated will be indicated for translation in the language concerned.

*Individual authorities' test guidelines*

Version 1 of the web-based TG Template has been designed for the development of Test Guidelines for UPOV. However, it has also been designed such that Version 2 will enable members of the Union to use:

- (a) adopted UPOV Test Guidelines as a basis for the development of individual authorities' test guidelines;
- (b) the web-based TG Template and database of characteristics to develop individual authorities' test guidelines for which there are no UPOV Test Guidelines; and
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Version 2 will have a feature for individual authorities to modify the template wording, within the same structure, to act as a template for their own test guidelines and a feature to allow individual authorities to convert UPOV Test Guidelines into individual authorities' test guidelines, with necessary modifications.

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