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International Union for the Protection of New Varieties of Plants

Technical Working Party for Ornamental Plants and Forest Trees Fifty-First Session Christchurch, New Zealand, February 18 to 22, 2019	**TWP/3/8** **Original:** English **Date:** January 31, 2019

Technical Working Party for Vegetables
Fifty-Third Session
Seoul, Republic of Korea, May 20 to 24, 2019

Technical Working Party for Fruit Crops
Fiftieth Session
Budapest, Hungary, June 24 to 28, 2019

Technical Working Party for Agricultural Crops
Forty-Eighth Session
Montevideo, Uruguay, September 16 to 20, 2019

Technical Working Party on Automation and Computer Programs
Thirty-Seventh Session
Hangzhou, China, October 14 to 16 (morning), 2019

GUIDANCE FOR DRAFTERS OF TEST GUIDELINES

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 provide guidance for drafters of Test Guidelines and to report developments on the web-based Test Guidelines template (web-based TG template).

2.   The TWPs are invited to note:

        (a)   the issues on the web-based TG template addressed during 2018, as set out in paragraph 11 of this document;

        (b)   the issues currently being addressed on the web-based TG template, as set out in paragraph 12 of this document;

        (c)   that the Office of the Union will issue a circular to identify requirements of UPOV members for the development of individual authorities' test guidelines using the web-based TG template; and

        (d)   that training on the web-based TG template will be provided to all TWPs, at their sessions in 2019.

3.   The following abbreviations are used in this document:

        TC: Technical Committee
        TC-EDC: Enlarged Editorial Committee
        TG: Test Guidelines
        TWA: Technical Working Party for Agricultural Crops
        TWC: Technical Working Party on Automation and Computer Programs
        TWF: Technical Working Party for Fruit Crops
        TWO: Technical Working Party for Ornamental Plants and Forest Trees
        TWPs: Technical Working Parties
        TWV: Technical Working Party for Vegetables

4.   The structure of this document is as follows:

ANNEX I   Features of the Web-based TG Template
ANNEX II   Issues agreed by the TC, at its fifty-third session

DEVELOPMENTS IN 2018

Comments by the Technical Working Parties

5.   At their sessions in 2018, the TWA, TWC, TWF and TWV considered document TWP/2/8 Guidance for drafters of Test Guidelines (see documents TWA/47/7 "Report", paragraphs 55 to 59, TWC/36/15 "Report", paragraphs 100 to 105, TWF/49/12 "Report", paragraphs 38 to 42 and TWV/52/20 "Report", paragraphs 54 to 58).

6.   The TWPs noted the proposals presented by the TWPs, at their sessions in 2017, for further improvements to the web-based TG template, as set out in paragraphs 7 to 12 of document TWP/2/8.

7.   The TWPs noted the issues on the web-based TG template addressed during 2017, as set out in paragraphs 13 to 22 of document TWP/2/8.

8.   The TWPs noted the issues currently being addressed on the web-based TG template, as set out in paragraph 23 of document TWP/2/8.

9.   The TWPs noted that training on the web-based TG template would be provided to all TWPs, at their sessions in 2018.

10.   The TWC noted that the Netherlands welcomed the improved functionalities of the web-based TG template and the report by the Netherlands that the web-based TG template saved time when drafting Test Guidelines.

Issues addressed on the web-based TG template

11.   Solutions for the following issues raised by users of the web-based TG template were implemented in 2018:

- to specify information for more than one method of propagation in Chapter 3.4 "Test Design";
- addition of new standard wording paragraph at Chapter 4.2 "Uniformity" to specify type of propagation considered in the Test Guidelines;
- example variety master list: addition of a pop up window with related characteristics before confirming the deletion of a variety from the master list of example varieties;
- improved functionality to move characteristics up and down in the table of characteristics (drag and drop);
- addition of characteristics not contained in the table of characteristics at the end of the Technical Questionnaire (TQ);
- separation of color characteristics in TQ to be indicated as RHS Colour Chart reference or color group;
- addition of a possibility to edit the scope of the Test Guidelines on the cover page (e.g. for excluding species and UPOV Codes);
- concurrent translation of Test Guidelines (see Annex I);

- improve reminders automatically generated by the web-based TG template (include TG references and name of relevant TWP);
- improve display of TQ5 to display all rows and buttons in the same window;
- issues agreed by the TC, at its fifty-third session, have been implemented (see Annex II).

LATEST DEVELOPMENTS

Issues being addressed

12.   The following issues on the web-based TG template are currently being addressed:

- national test guidelines: survey on needs of members is under preparation;
- options to improve the Test Guidelines export files generated by the template;
- import and export of tables (e.g. growth stages) and illustrations;
- restrict access to leading experts during the LE drafting and LE checking periods (no links to HTML or word previews for interested experts);
- continuous fixing of minor bugs due to deployment of improvements in the template;
- addition of hyperlinks in the exported documents to the symbols indicating that a characteristic has explanations covering individual and/or several characteristics in the Table of Characteristics in order to facilitate electronic navigation in the document;
- possibility to display large tables in landscape format, such as for indication of growth types;
- provide the comments by the Office of the Union on draft Test Guidelines in the web-based TG Template;
- creation of an interface for the translation of new text (non-standard text) in UPOV languages.

Individual authorities' test guidelines

13.   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

(c)   use individual authorities' test guidelines, developed using the web-based TG Template, as the basis for draft UPOV Test Guidelines.

14.   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.

15.   The Office of the Union will issue a circular to identify requirements of UPOV members for the development of individual authorities' test guidelines using the web-based TG template. Subject to the availability of resources, development of the new functionalities will start in 2019.

TRAINING

16.   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).

17.   Training was provided to all TWPs, at their sessions in 2017 and 2018, under agenda item "guidance for drafters' of Test Guidelines". Training on new functionalities and changes to the web-based TG Template

will be provided to all TWPs, at their sessions in 2019, under the same agenda item. Bilateral training by electronic means will also be organized upon request from experts.

18. Users are invited to provide feedback or questions directly via the web-based TG Template by clicking on the link "Feedback":

Guidance for users of the web-based TG template

19. 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

20. Alternatively, the tutorials are also available for download under the following link: http://upov.int/export/sites/upov/tgp/en/tg_template_tutorial_complete.pdf

21. The web-based TG template tutorials contain a list of most frequently asked questions for the different user roles.

22. The TWPs are invited to note:

(a) the issues on the web-based TG template addressed during 2018, as set out in paragraph 11 of this document;

(b) the issues currently being addressed on the web-based TG template, as set out in paragraph 12 of this document;

(c) that the Office of the Union will issue a circular to identify requirements of UPOV members for the development of individual authorities' test guidelines using the web-based TG template; and

(d) that training on the web-based TG template will be provided to all TWPs, at their sessions in 2019.

[Annex I follows]

ANNEX I

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 TWPs 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

(c) use individual authorities' test guidelines, developed using the web-based TG Template, as the basis for draft UPOV Test Guidelines.

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.

[Annex II follows]

ANNEX II

ISSUES AGREED BY THE TC, AT ITS FIFTY-THIRD SESSION

The following issues agreed by the TC, at its fifty-third session have been implemented in the web-based TG Template (see document TC/53/31 "Report", paragraphs 129 to 139 and 141):

Revision of the software code

A general revision of the software code has been successfully completed eliminating diverse malfunctioning issues.

Order of UPOV codes and botanical names

The TC agreed that UPOV codes and botanical names in draft Test Guidelines should, in general, be displayed in alphabetical order. However, the TC agreed that the web-based TG Template should allow the Leading Expert to change the order, if appropriate.

Order of methods of observation

The TC agreed that the methods of observation of a characteristic should continue to be presented in alphabetical order, thereby avoiding any indication of order of preference.

Subsequent explanations covering several characteristics

The TC agreed that characteristics with the same explanation could be displayed in Chapter 8.2 "Explanations for individual characteristics" with subsequent explanations being cross-referenced to the first characteristic displaying the appropriate information.

Explanations covering all characteristics

The TC considered whether explanations covering all characteristics should be displayed before Chapter 8.1 "Explanations covering several characteristics" without a note in the Table of Characteristics. The TC agreed to invite the TWPs, at their sessions in 2017, to consider this proposal and report to the TC, at its session in 2018 (see document TC/53/31 "Report", paragraphs 107 to 110).

The TWA and TWV agreed that explanations covering all characteristics were not used in Test Guidelines for agricultural crops vegetables (see documents TWA/46/10 "Report", paragraph 116 and TWV/51/16 "Report", paragraph 55).

The TWO and TWF agreed that explanations covering all characteristics should be able to be displayed before Chapter 8.1 "Explanations covering several characteristics" without a note in the Table of Chars (see documents TWO/50/14 "Report", paragraph 80 and TWF/48/13 "Report", paragraph 59).

A link "View/Edit explanation covering all characteristics" was added on top of the list of characteristics to enable a particular explanation to be displayed before Chapter 8.1. The following screenshot indicates the positioning of the link:

[End of Annex II and of document]