





## *Gene-IT Users' Manual*

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## 1.1 Identification Screen




This identification screen allows secure access to data managed by Gene-IT. There are several user profiles available, ranging from account "guest" with limited rights to the "Administrator" with complete control of the software.

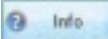
## 1.2 Welcome Screen

This is the first screen that appears to launch the program. It displays the information of the version of this tool.



A click on  closes the welcome screen and displays the next window on the contractors.

*Note: after 15 seconds, if the user takes no action, this window will close automatically.*

Clicking on  will open a window on the conditions of use of this software.

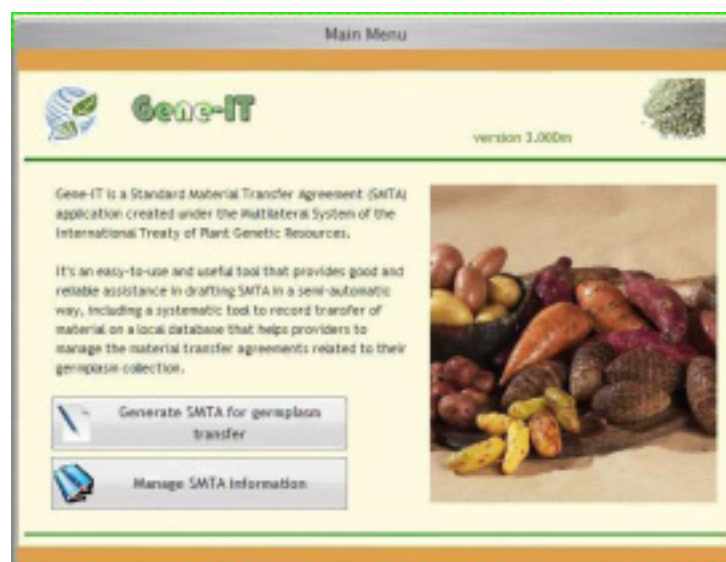
## 1.3 Main Screen



This screen allows you to access all features of Gene-IT through two types of menus:

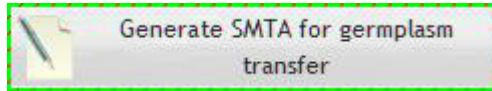
- The main menu, which displays two buttons
- Two floating bars respectively for accessing tools or complementary information.

### A) Main Menu



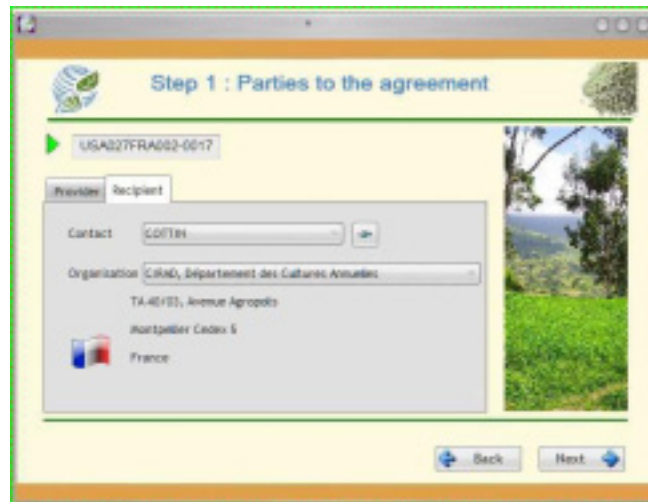
This screen allows access to two main features of Gene-IT: some basic indications on how to generate an SMTA adapted to the exchange of plant genetic resources and access to that function and a button to access all the files necessary references for the generation of the text.

### A-1) CREATING A SMTA



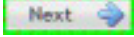
#### A-1.1) STEP 1: PARTIES TO THE AGREEMENT

This screen allows the user to enter the identification and contact details of both the provider and the recipient of the genetic resources. The user has to click on a top tab to change the view from one screen to the other.



The unique identification number of the SMTA is automatically assigned by the software.

NB: the name of the provider is accessible only through the configuration screen (button "Config" located on the toolbar "Tools" (see B-5).

Once the mandatory information is provided, the user has to click on "Next" , which closes the window, saves user's configuration and goes to the next screen on the legal status of the material to be transferred.

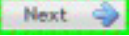
#### A-1.2) STEP 2: MATERIAL TRANSFERRED AND BENEFIT-SHARING


At this stage, the user must answer a number of questions to determine what is the type of standard agreement suitable for the particular situation.


The screenshot shows a web-based form titled "Step 2 : Characteristics of the material and benefit sharing option". The form contains several sections:

- Annex I plant genetic resources
- Research, breeding and training for food and agriculture utilisation purposes
- Material under development
- Benefit sharing option
  - Article 6.7
  - Article 6.11
- Additional conditions

At the bottom, there is a field for "SMTA #" with the value "4" and two buttons: "Back" and "Next".

The figures on a black background tell you the steps to follow before you click the button "next" .

The number of steps varies from 2 to 5 according to your answers. For example,  located beside a question indicates that you must answer it before moving on to the fifth stage.

If  is located above the "next" button and you've responded to questions 1, 2 and 3, you can go to the next screen.

You must describe in a maximum of 5 steps the genetic resources holds by your organization by checking the box next to the various information characterizing the response and if the answer is "Yes" or by unchecking it otherwise:

a) Does the genetic resources belongs to the species listed in Annex I of the International Treaty? To help you, you can click on the "Annex I" located at the "information" toolbar which will display a list of these species (see paragraph B-3 below).

b) Is this material being transferred for research, training, or breeding for food or agricultural use?

c) Is the material under development?

If the answer is yes, the question regarding the acquisition will be activated (see d)

If the answer is "No" (box unchecked), the option on the type of benefit sharing will be activated (see e). In both cases, this is question No. 4.

d) Are there any restrictions for the transfer of the material?

Check the box if so, or uncheck it in the opposite case.

Whatever your choice is, you can proceed to Step No. 5: Click on "Next" at the bottom right corner of the window).

e) Then you have two benefit-sharing options:

Either under Article 6.7

Either under Article 6.11

The choices are mutually exclusive, ie only one can be chosen at a time.

Whatever your choice is, you can skip to validate the data your entered by clicking on "Next".

The buttons at the bottom right to navigate between windows:



Back

redisplays the previous screen



Next

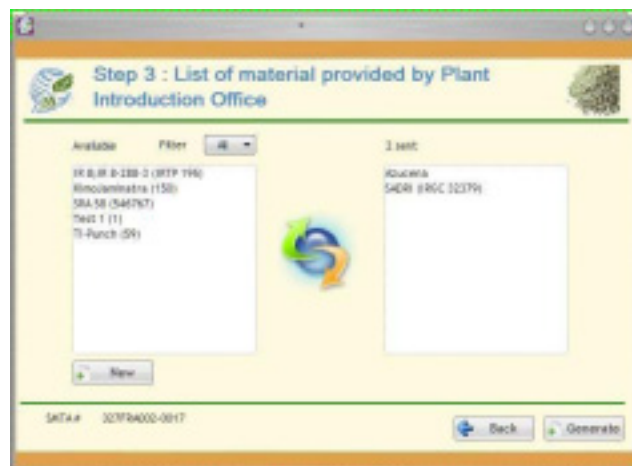
closes the current window and displays the windows on the next steps.


### A-1.3) STEP 3: LISTS THE MATERIAL PROVIDED AND GENERATES THE SMTA

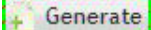
The last informative step is uses to indicate the characteristics of plant material transferred.

For this you have a selection list of varieties available on your site.

The drop-down list, located at the top right of the list of varieties available, allows you to limit the list to the varieties beginning with the letter chosen.

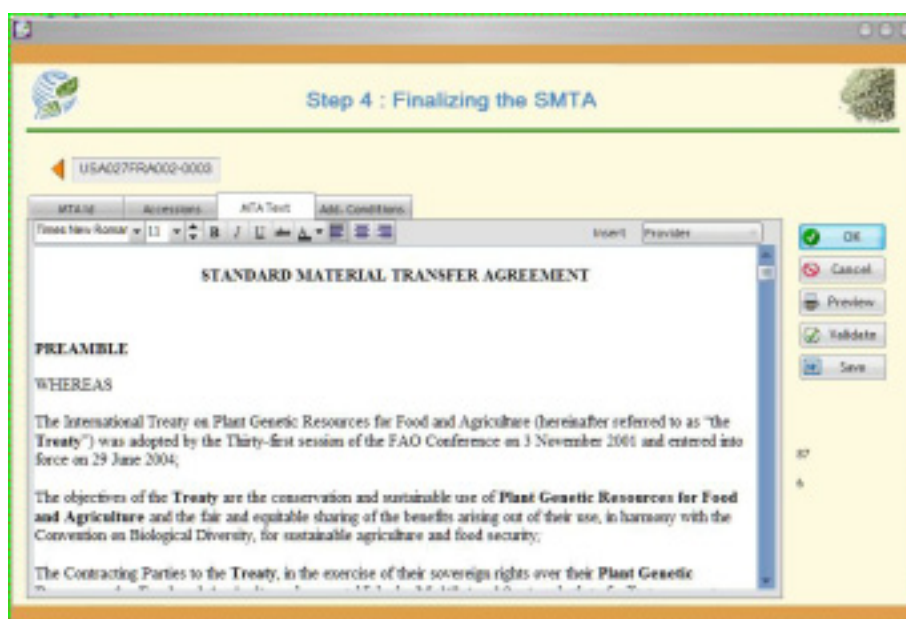


If you want to review the legal characteristics of the plant material, click on the "Back" button  and the software will take you back to the previous screen.


Otherwise, click on "Generate"  to create the agreement which meets the information you just entered.

#### A-1.4) STEP 4: FINALIZING THE SMTA

The information previously entered (identification and addresses, list of plant material, etc.) has been inserted in the text of the SMTA, if applicable.



The user can also add some additional information (date, URL, etc.), revise and print it before passing it for signature to the other contractors.

The button "save" , lets the user saving the document in RTF format and to edit it with a word processor compatible (MsWord, OpenOffice Write, ...). The name of the document consists of the number of SMTA and the extension (RTF USA027FRA002-0003.RTF eg).

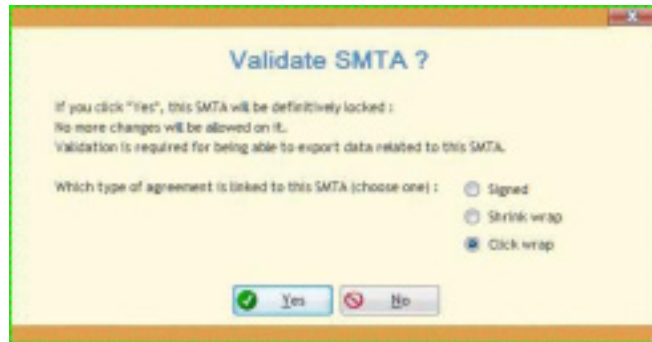


Once the user has inserted all the modifications needed, he must validate the SMTA by



clicking on "Validate" to finalize the document and to prevent any later modifications.


#### A-1.5) FINAL STEP: VALIDATION OF THE SMTA



The validation of the SMTA is related to the choice of signing the SMTA.

Three options are displayed on the screen: you can make your choice before clicking the button "Yes".

#### A-1.6) EXPORTING THE SMTA DATA

The validation also activates the button "Export" , which allows you to save the SMTA related information in an electronic standard to exchange it between the different parts involved in this transfer.

Two sizes are available for exchange, XML classic



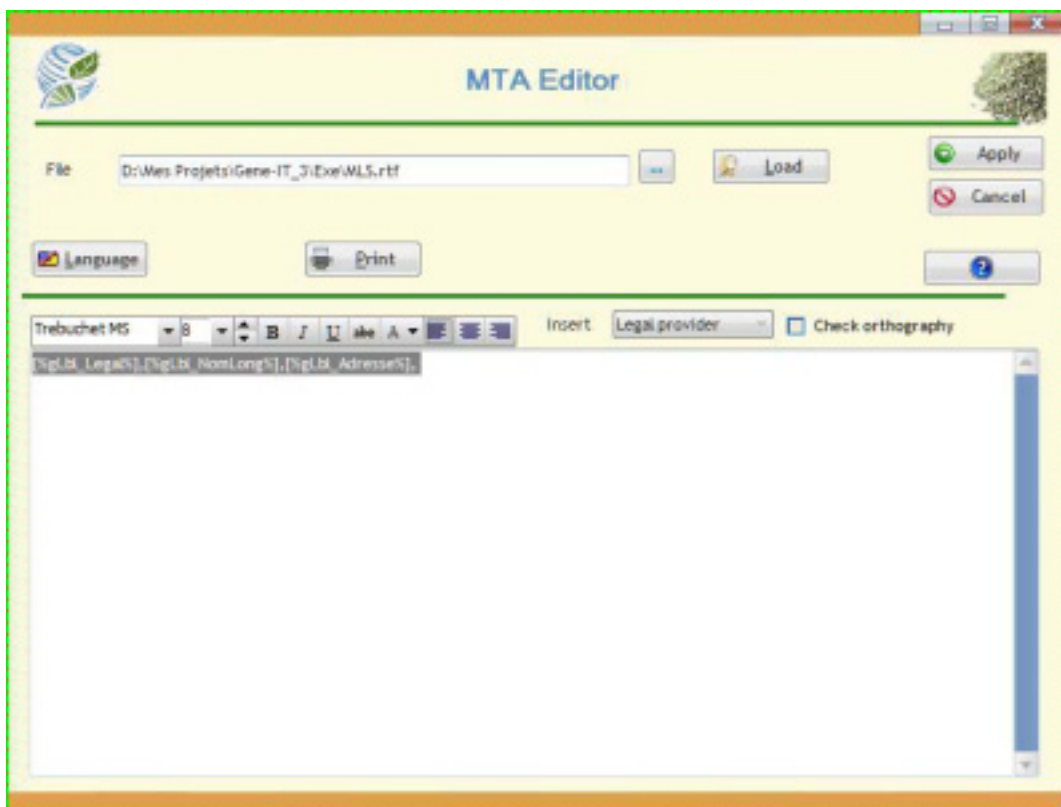
An encrypted XML (XMTA) is automatically decoded by Gene-IT.



This format has the advantage of guaranteeing a good privacy level in the electronic exchange.

*A-1.7) EDITION OF A MTA*

In the case where an SMTA is not applicable, Gene-IT offers a MTA editor:

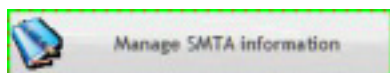


The text editor included in Gene-IT enables you to write (or load) a RTF document which meets the requirements of the MTA.

A toolbar enables you to change the text (bold, underline, font, etc.) and to adjust the layout of the document in accordance with your preferences.

#### *A-2) MANAGEMENT OF MTA RELATED INFORMATION*

The second button on the main menu gives you access to a submenu to manage the SMTA information and the required references.



Three management options are possible: by contact, by SMTA or by accessions managed by the software.

### A-2.1) MANAGEMENT OF CONTACTS AND ORGANISATIONS

F_Exchange	DateExchange
USA027FRA004-0001	20070126
USA027FRA004-0002	20080317
USA027FRA003-0001	
USA027FRA002-0002	
USA027FRA002-0003	
USA027FRA003-0004	
USA027FRA002-0005	

This screen allows you to view and edit the contact information, whether this contact is a supplier or a recipient of plant material.

Clicking the "Exchanges" lists the SMTAs containing that contact.

### A-2.2) MANAGEMENT OF SMTA

I/O	Id SMTA	Date	Recipient
	FR-004-04027-0002		circin
	FR-004-04027-0003		circin
▶	FR-004-04027-0001	27/03/2008	see file
▶	FR-004-04027-0002		see file
▶	FR-004-04027-0003		see file
▶	FR-004-04027-0004		see file
▶	FR-004-04027-0005		see file
▶	FR-004-04027-0006		circin
▶	FR-004-04027-0007		circin
▶	FR-004-04027-0008		see file
▶	FR-004-04027-0009		see file
▶	FR-004-04027-0010		circin
▶	FR-004-04027-0011		circin
▶	FR-004-04027-0012	15/02/2008	circin
▶	FR-004-04027-0013	01/04/2008	circin
▶	FR-004-04027-0014	06/04/2008	circin
▶	FR-004-04027-0015		circin
▶	FR-004-04027-0016		circin
▶	FR-004-04027-0017	10/06/2008	circin
▶	FR-004-04027-0018	04/07/2008	circin
▶	FR-004-04027-0019	10/10/2008	circin
▶	FR-004-04027-0020		circin
▶	FR-004-04027-0021		circin

This screen allows you to manage the list of SMTAs: by clicking the appropriate button, located above the list, you can choose to view only the SMTA incoming, outgoing or all of SMTAs managed locally by Gene-IT. On the right of each line, a green or orange icon indicates the direction of the SMTA exchange.

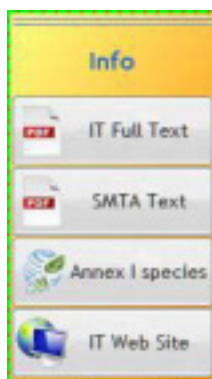
Double-clicking on a line opens the window and displays the SMTA.

### A-2.3) MANAGEMENT OF ACCESSIONS (MCPD)



The management of accessions is conducted by Gene-IT in nomenclature MCPD (Multi-Crop Passport Data). The button "MTA List" at the bottom left, displays the list of SMTA including the accession currently on the screen. As in the view "Contacts", by making double-click on a line of the list and Gene-IT will show the details of the SMTA.

### B) Toolbar « Info »



The toolbar "Info" contains four buttons to access the text of the Treaty and that of the SMTA, and some additional background information on the International Treaty and its implementation.

(1) *B-1) TEXT OF THE INTERNATIONAL TREATY*

Clicking on this button allows you to view, in one of the six official languages of FAO and by language being used by Gene-IT, the full text of the International Treaty in PDF format. A programme for reading this format (Acrobat, Foxit, etc.) is required on your computer to take advantage of this feature.

*B-2) TEXT OF THE SMTA*

This button allows you to view, in one of six languages of FAO and by language being used by Gene-IT, the full text of the Standard Material Transfer Agreement. As the previous button, you will need a programme to read PDF (Acrobat, Foxit, etc.) installed on your computer.


*B-3) LIST OF CROPS LISTED IN THE ANNEX I OF THE INTERNATIONAL TREATY*

Clicking the "Annex I" button displays a window with the species listed in the Annex I of the International Treaty.





Genus	Species	Cropname
Helianthus	annuus	Sweet-velvet
Helianthus	sp.	Sunflower
Hordeum	sp.	Barley
Ipomoea	sp.	Sweet potato
Isatis	sp.	Woad
Lathyrus	sativus	Sweet Pea
Lathyrus	cyaneus	Vetchings
Lathyrus	albus	Sweet Pea
Lathyrus	terrestris	Hairy Vetching
Lathyrus	terrestris	Sweet Pea
Lathyrus	terrestris	Sweet Pea
Lentil	sp.	Lentil
Leguminosae	sp.	Pepper Grasses
Lotus	sp.	Bath Clover


Click on genre to see any comments on it. Use the side bar on the right side of the list to scroll it.

In order to obtain a hard copy or PDF format, click on "Print" . Then, you will preview the file.



One click on the button  will let you to choose the printer and the number of copies.

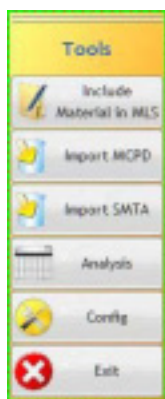
Click on  to create a PDF file from the preview, which could be use, for example, with Acrobat Reader®.

Once the consultation is completed, click on the OK button  to close the window and to return to the screen on the legal characteristics of the genetic resources transferred.

**B-4) WEB SITE OF THE INTERNATIONAL TREATY**

If you have an active Internet connection, this button lets you to start Internet Explorer and to visit the homepage of the International Treaty in English, French or Spanish (<http://www.planttreaty.org/>)

b) C) **Toolbar « tools »**



This toolbar allows you to access features available in Gene-IT, but also to quit the software.

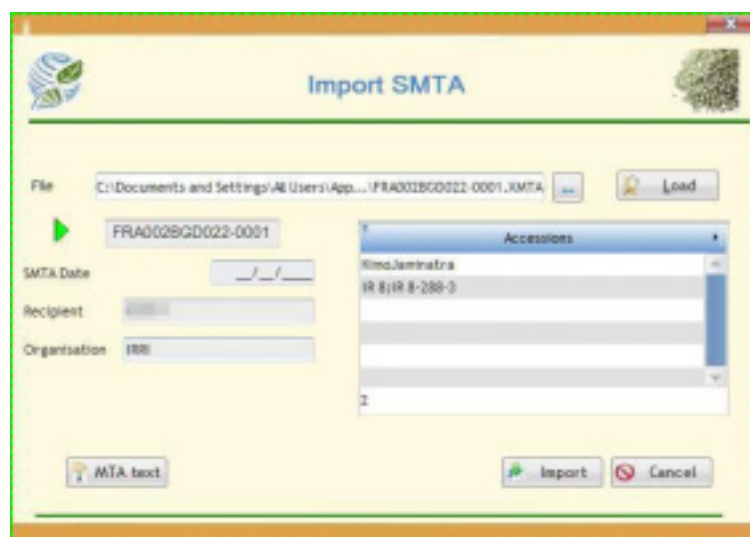
### *C-1) STANDARD LETTER TO NOTIFY THE INCLUSION OF GENETIC MATERIAL IN THE MLS*

This button allows you to get into your word processor, using the RTF format, to write a letter to notify the inclusion of genetic material in the Multilateral System. This document can be adapted to your own needs.

### *C-2) IMPORT OF ACCESSION RELATED INFORMATION*

With this button is possible to import the characteristics of the accessions, according to the format MCPD . The export of such data from third-party software is not part of this project.

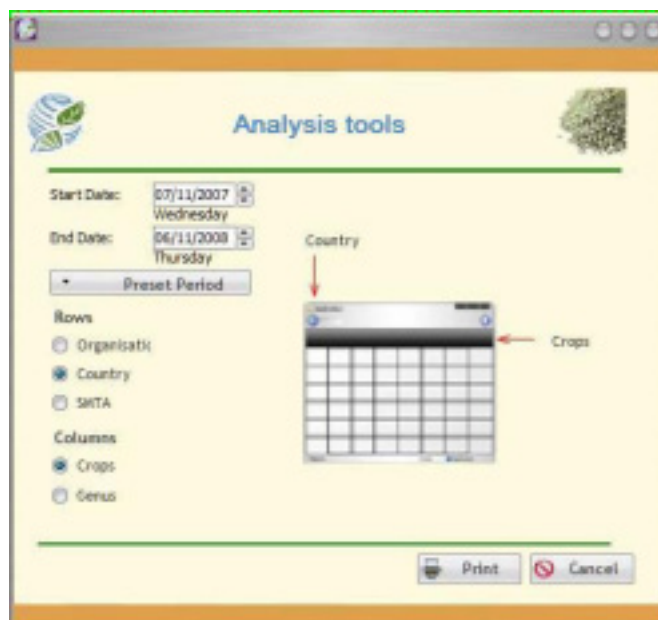
### *C-3) IMPORT OF SMTA RELATED INFORMATION*



If your counterpart also uses Gene-IT, you can import all the information related to the SMTA with this button. For that, you need to get through your choice of the swap file, exported from your ISP's genetic materials (see A.1-6 Export the SMTA). Once the file is loaded, clicking on the button "Import" to include all the information related to the SMTA in your local database.

### *C-4) ANALYSES OF EXCHANGES*





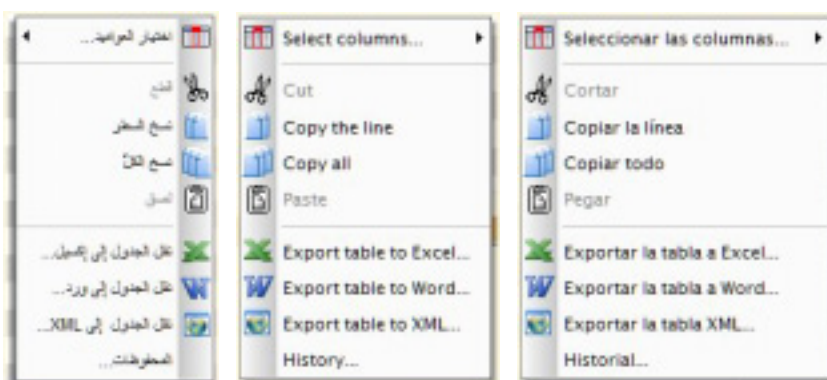
This button allows you to create several tables to give you an overview of your exchange activities under the International Treaty.

By clicking on the appropriate buttons, you select the type of information (organizations, country, SMTA) which should be in the row of the table, while the columns will be filled with information on varieties or genre taxonomy.

Clicking on the "Print" will let you to preview, print and export in various formats, this general overview table.

### *C-5) CONFIGURATION OF GENE-IT*

The button "Configuration" allows the setup of the Gene-IT software environment, particularly the customization of the interface language. You can select to use one of the six official languages of FAO.



Arabic

English

Spanish



French

Chinese

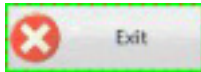
Russian

It is also through this screen that the choice of the identity of the supplier is archived. There are other tools to physically maintain (re-indexing, repair, etc) to the local database and to manage the image library used to illustrate some screens of Gene-IT.

*Note 1: Changing the language of the interface will restart the software to implement the changes.*

*Note 2: The choice of the language will only affect the software interface, not the data exchanged, which will be available only in English.*

### *C-6) EXIT GENE-IT*



This button lets you close the program and end your session.

A new use will require you to log in again to enjoy access rights associated with your account (see 3.1).