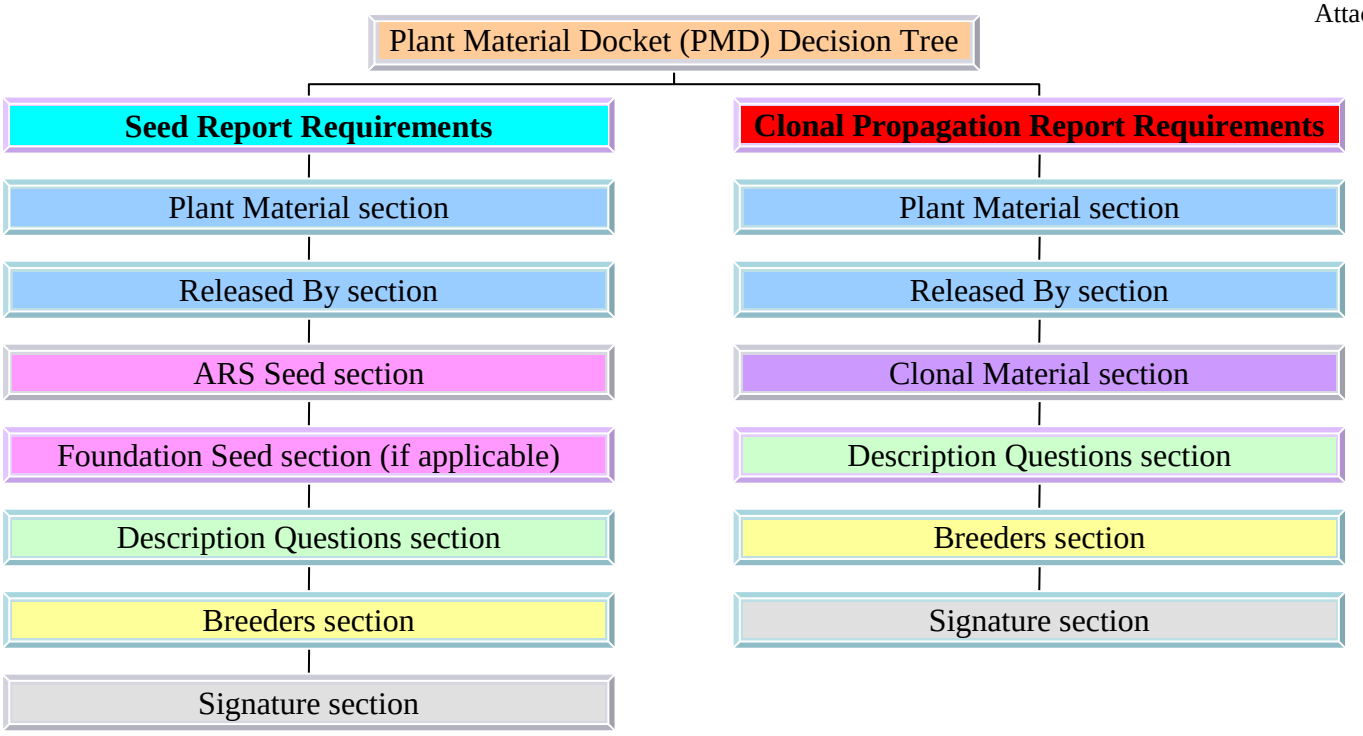
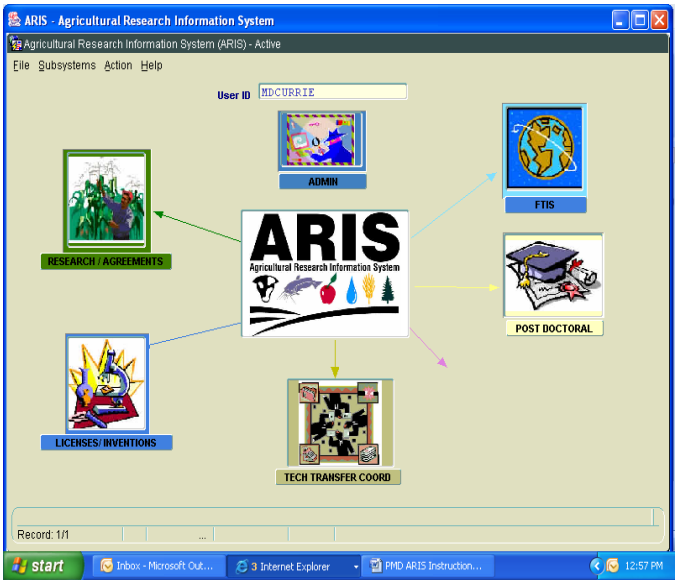
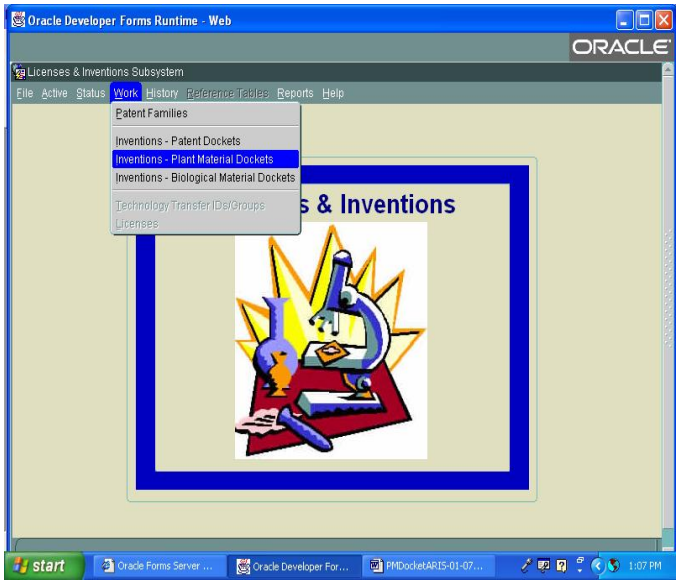


TIPS:

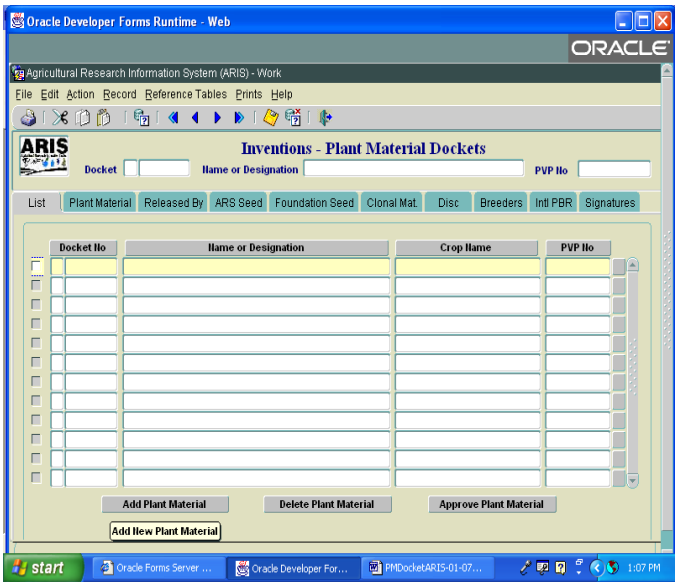
- Title, Phone and Fax numbers, and Email addresses are needed for all Breeders listed on a report.
- OTT will complete information related to Plant Variety Protection (PVP).
- Only one ARS employee may be designated as the Primary Contact.
- Question #6: List countries where there might an International market for the Plant Material; or if the Plant Material has been sent to a foreign country for testing or breeding.
- The Intl PBR section is restricted to HQ/OTT use. It does not apply to the response in Question #6.
- There is no line limitation to the responses for Questions 1 - 6; use the copy/paste feature of Word (Use Ctrl C (copy) and Ctrl V (paste), instead of the copy/paste icons in ARIS).
- Look for SAVE buttons at the bottom of some screens. The Save icon at the top of the screen will not work whenever there is a SAVE button located within a screen.
- Always highlight the line of information you want to select or delete. Check boxes do not exist for marking and defining selections (as in other ARIS modules).
- Use the View/Modify feature when changes are necessary within the different data components. The system does not allow for "unchecking" and "checking" once a selection is made (such as Primary Contact identification).
- Only one Project Number can be selected when filing a Plant Material Docket report.
- There are two data bases used for ARS employees: Current and Former. Select • Both when searching for an employee who may have recently retired from ARS. It takes time for employees to be revised from Active to Obsolete in the Personnel database, which is where the information is generated.



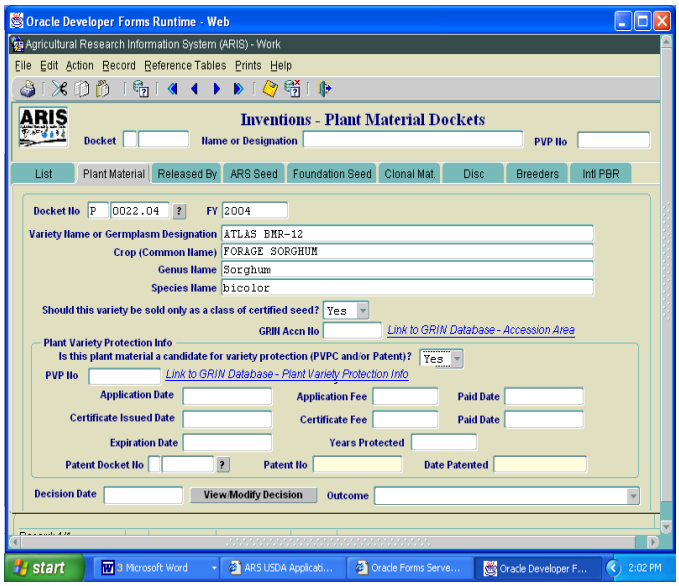
- Click on the **Licenses/Inventions** icon



- Select **Work**
- Select **Inventions-Plant Material Dockets**

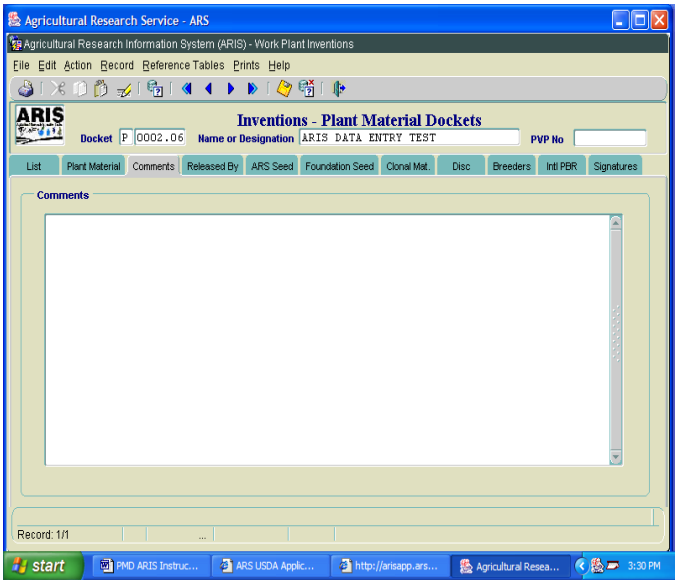


- Click the **Add Plant Material** button

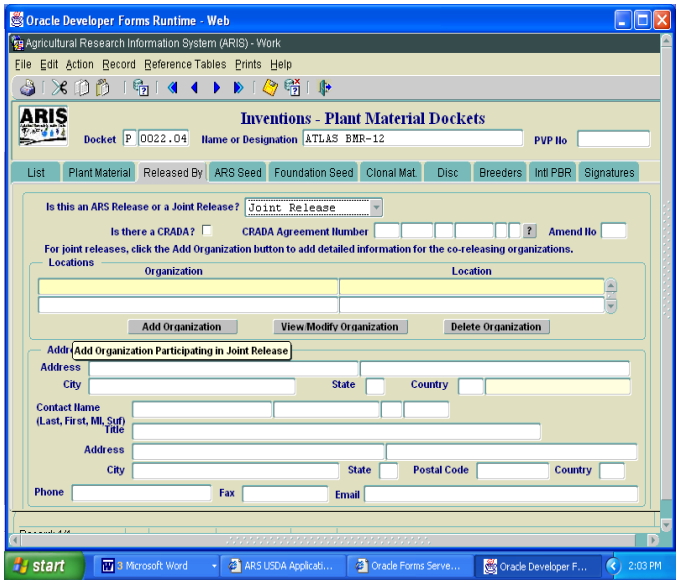


- Enter the Variety Name/Germplasm Designation, Crop (Common Name), Genus Name and Species Name
- **Certified Seed question:**
  - Click the ▼ button & **Select Yes or No**
- **Plant Variety Protection question:**
  - Click the ▼ button & **Select Yes or No**

- ♦ Docket No. and FY will automatically default into their respective blocks when the screen is saved
- ♦ OTT staff will complete the remaining data entry blocks in the Plant Variety Protection Info section



Use the Comments section for any special information or details not included elsewhere in the PMD. Use this section to relay information to the National Program Leader (NPL) or the OTT Staff.



ARS Release or Joint Release question:

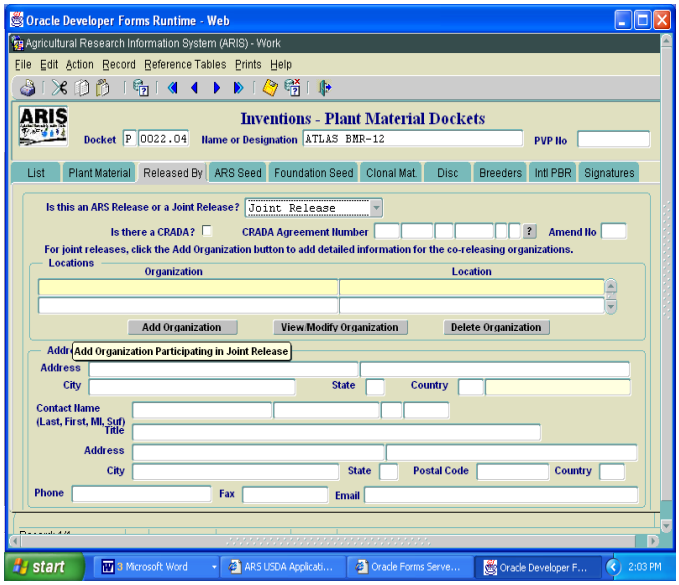
- Click the ▼ button **& Select ARS or Joint Release**

TIP: ARS Release/Joint Release is a required field; it cannot be blank.

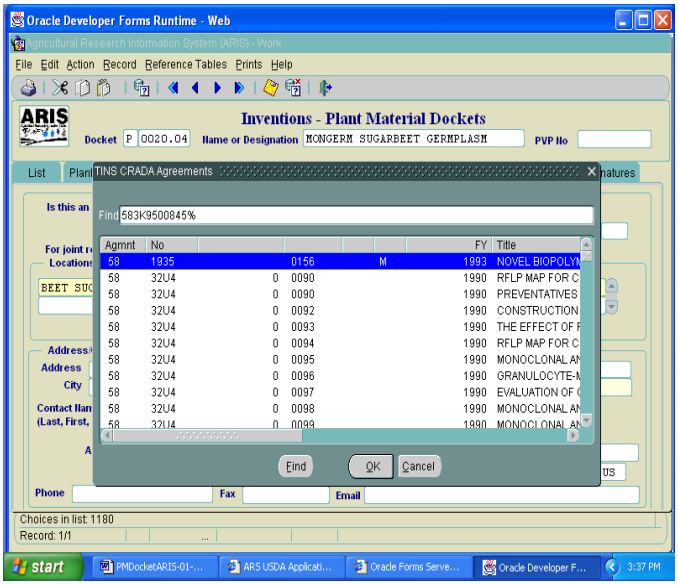
FOR AN ARS ONLY RELEASE:

- ♦ Select ARS Release and leave the remaining blocks on this screen empty.
- ♦ Click on the **ARS Seed** tab to continue (Go to Page 5 for the instructions when it is an ARS Only Release).

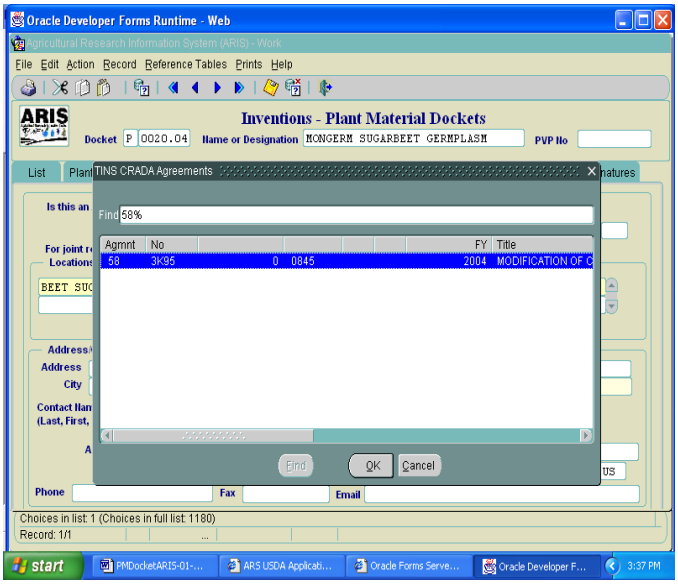
If the CRADA Agreement Number is not applicable, but it is a Joint Release: Go to Page 4 for the instructions.



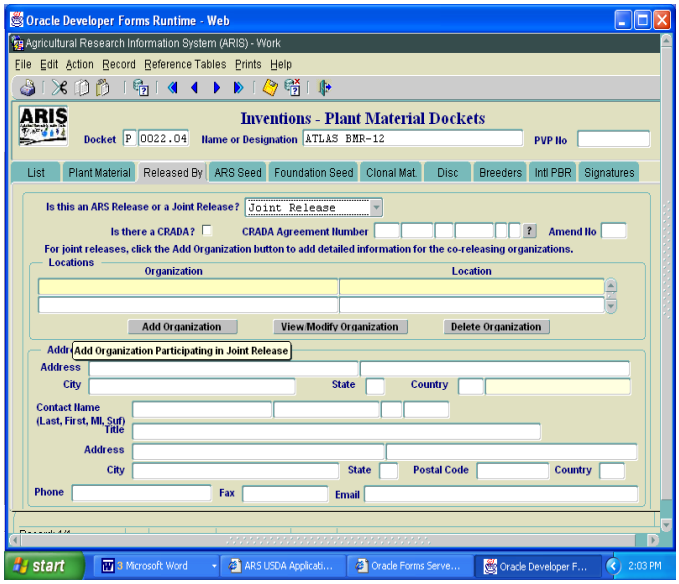
- Click the □ to enter a √ for Yes
- Click the **LOV ? button** to search for the CRADA Agreement Number



- Enter the CRADA Agreement Number in **front** of the **LOV % symbol** (do not use spaces or dashes)
- Click the **Find button** or hit the Enter key
- ***TIP:*** CRADA No. format = 583K95Xxxxx (the 58-3K95-X-xxxx is the standard numbering for CRADAs).

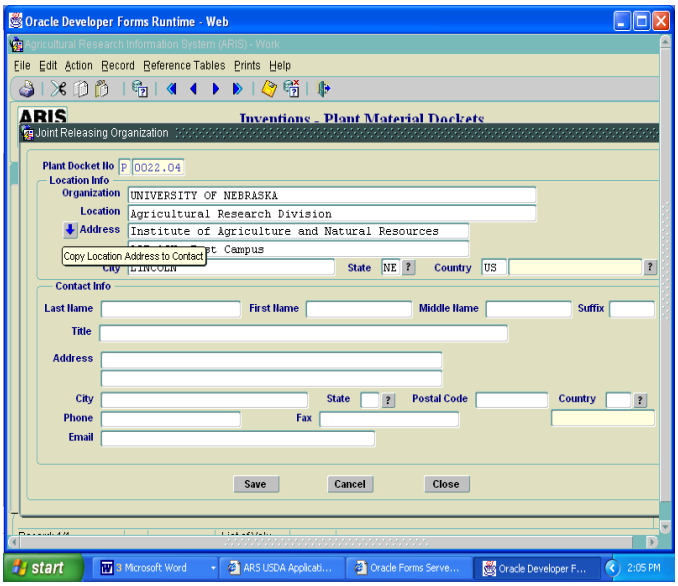


- The CRADA Agreement Number entered into the search block will appear (as shown above).
- Click the **OK button**

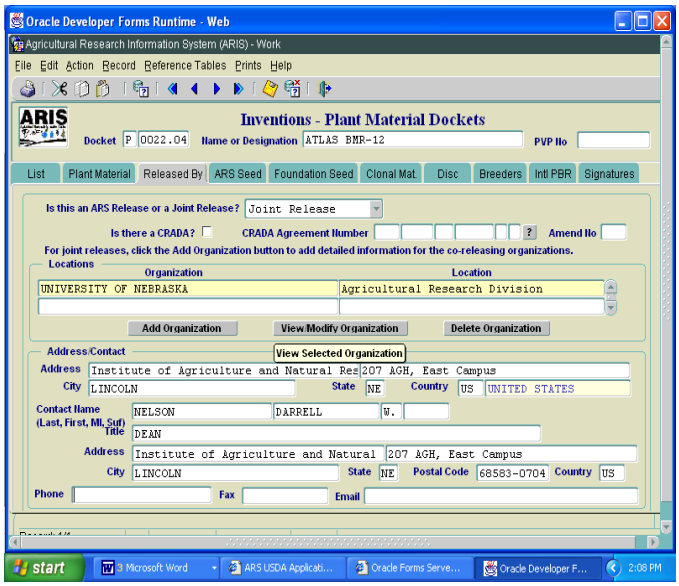


TIP: Joint Release Organization info in this section **must** be completed when a CRADA Agreement Number is entered.

- Click the **Add Organization button** (not used for ARS)

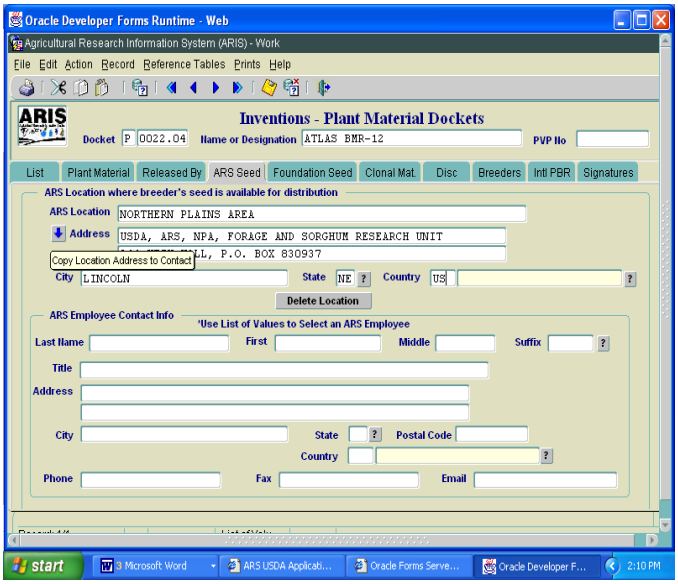


- Enter the Joint Release Org. info
- Click on the button to left of the Address line in the upper part of the screen to copy the Address info into the Contact Info section in the lower part of the screen (it saves typing and reduces errors).
- Complete the Contact Info data entry by entering the Contact's Name, Title, Phone, Fax and Email
- Click on the **Save button** (don't click on the Close button until after the screen/data entry has been saved).

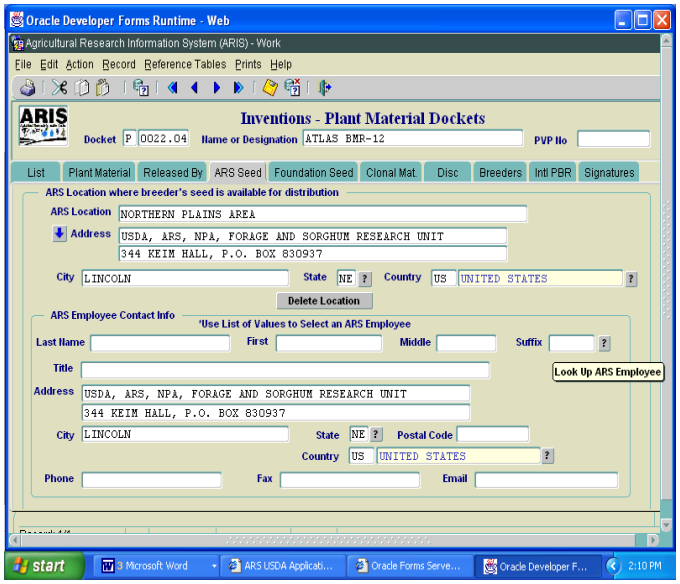


View/Modify Organization button: Allows for revisions or corrections to the information previously entered, such as adding phone and fax numbers or an Email address.

- Click the **View/Modify Organization button** if a revision is needed.
- Click the **Add Organization button** to add more than one entity participating in the joint release.



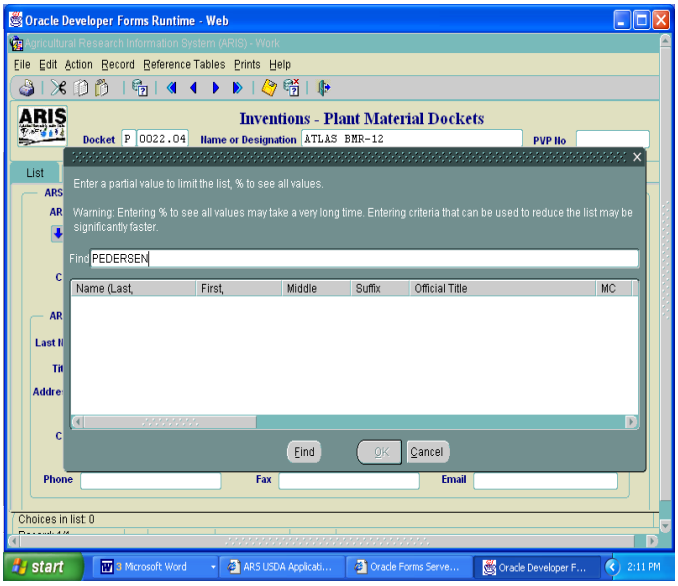
- Click the **ARS Seed** tab
- Enter the ARS Location, Address, City, State, Country information
- Click the Address button to copy the Address info into the Contact Info section below. ***TIP:*** The address info will also pop into the blocks in the lower portion of the screen when the ARS Employee is selected via the **LOV ? button**).



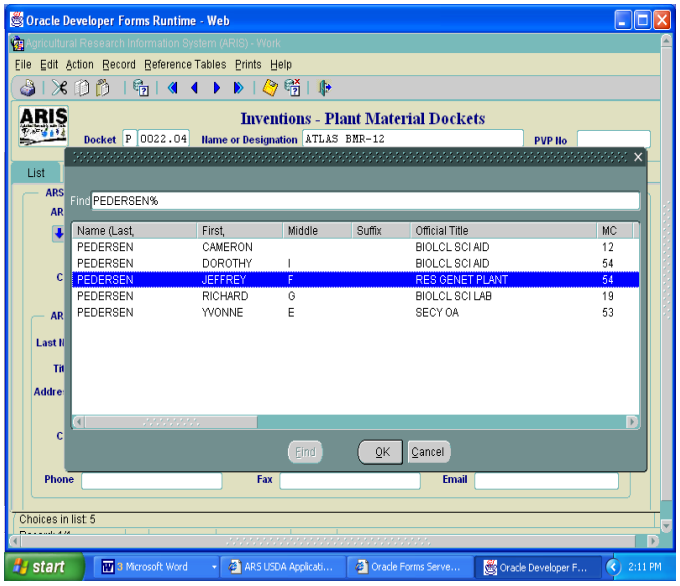
- Click the **LOV ? button** to search for the ARS employee who will be the Primary Contact for this release

TIP: Only one ARS employee may be designated and entered as the Primary Contact.

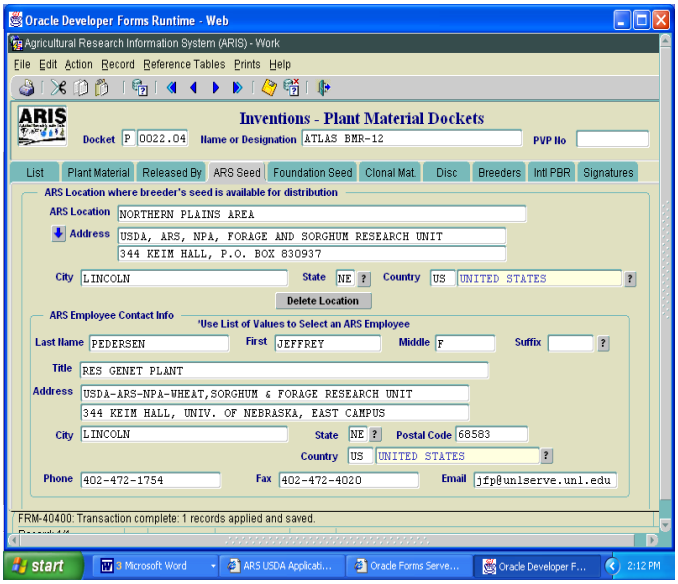
The LOV ? button must be used to identify the ARS employee. Attempting to manually enter the First/Last Name will result in an error message.



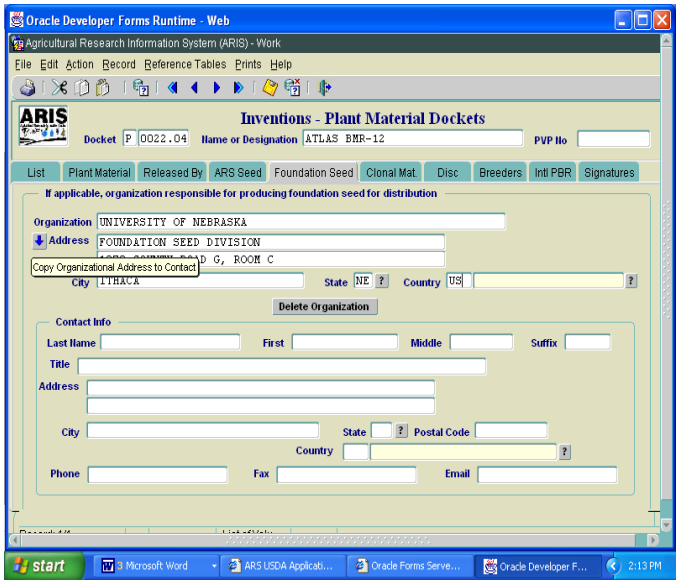
- Enter the Last Name of the ARS scientist in the **Find** line
- Click the **Find button** or hit the Enter key



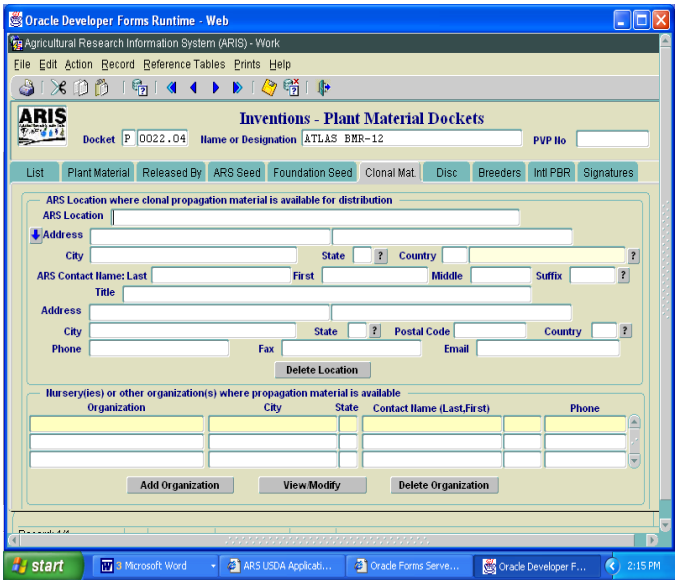
- **Highlight** the correct name
- Click the **OK button**



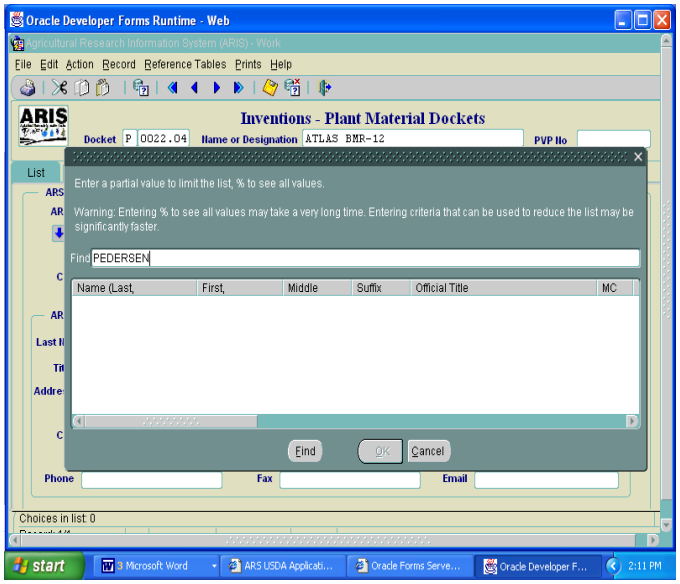
- Enter the Phone, Fax and Email information to complete the ARS Employee Contact Info section.
- Click the **SAVE icon**



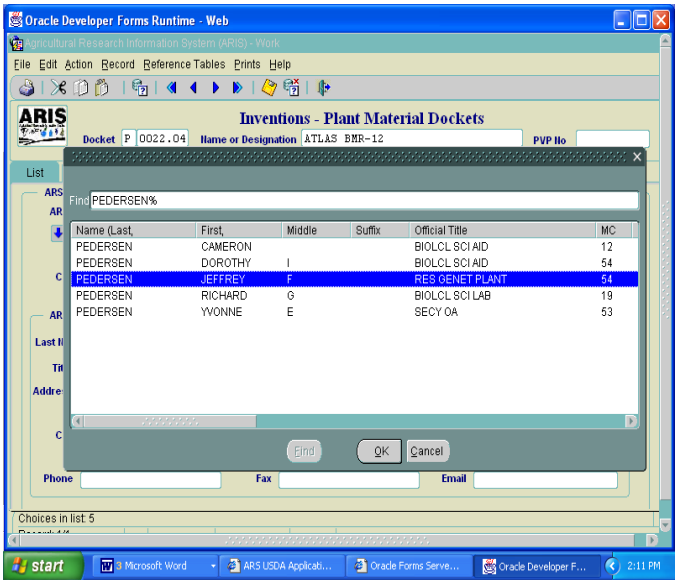
- Click the **Foundation Seed** tab
- Enter the Foundation Seed Organization Name, Address, City, State, Country info
- Click the ⬇ to copy data into the Contact Info section.
- Complete the screen by entering the Name, Title, Phone, Fax, Email info for the Foundation Seed Contact



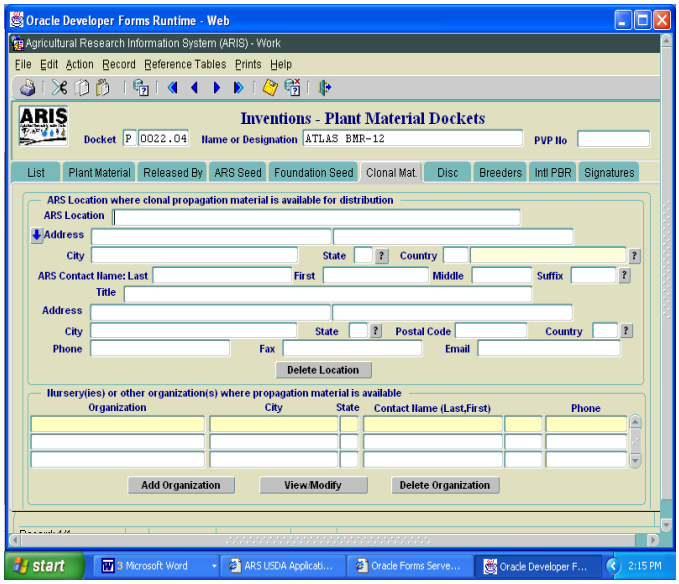
- Click the **Clonal Mat.** tab
- Enter the ARS Location, Address, City, State, Country
- Click the ⬇ to copy the Address info into the Contact Info section (or complete the screen by identifying and selecting the ARS Contact (enter Phone, Fax, Email)
- Click on **LOV ? button** to search for the ARS Contact



- Enter the Last Name of the ARS scientist in the **Find** line
- Click the **Find button** or hit the Enter key



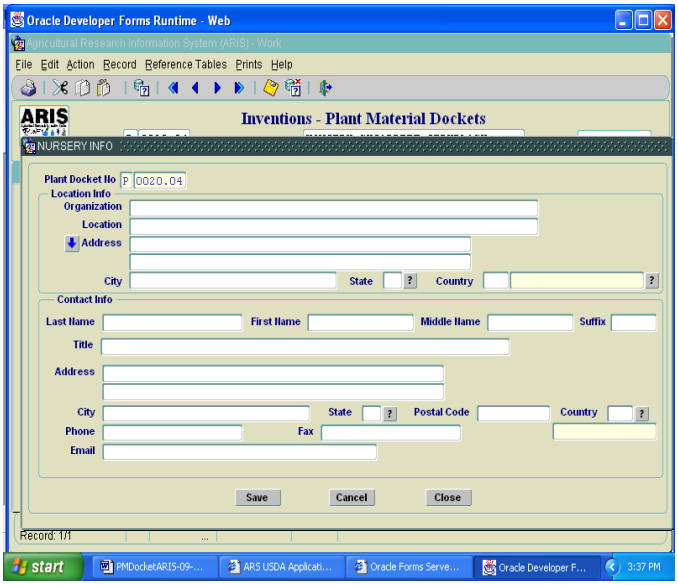
- **Highlight** the correct name
- Click the **OK button**



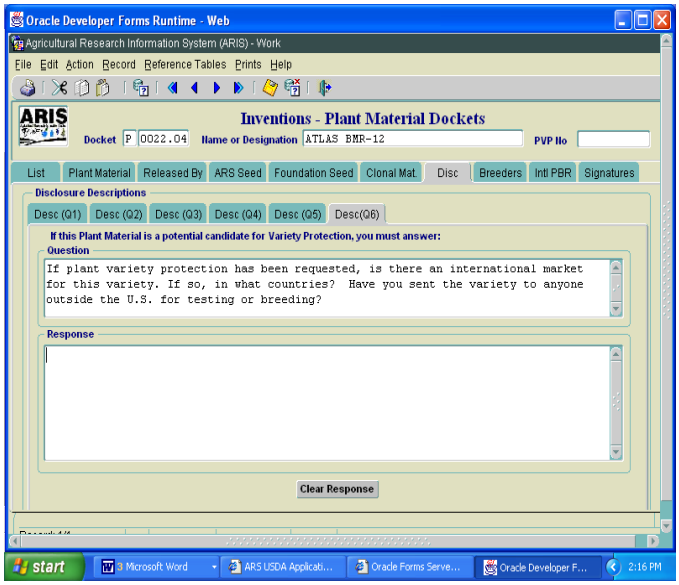
TIP: Complete the ARS Location section (top part of the screen) **ONLY** if ARS is holding the clonal propagation material.

If a nursery or other organization is holding the clonal propagation material: Complete the lower portion of this screen with their information.

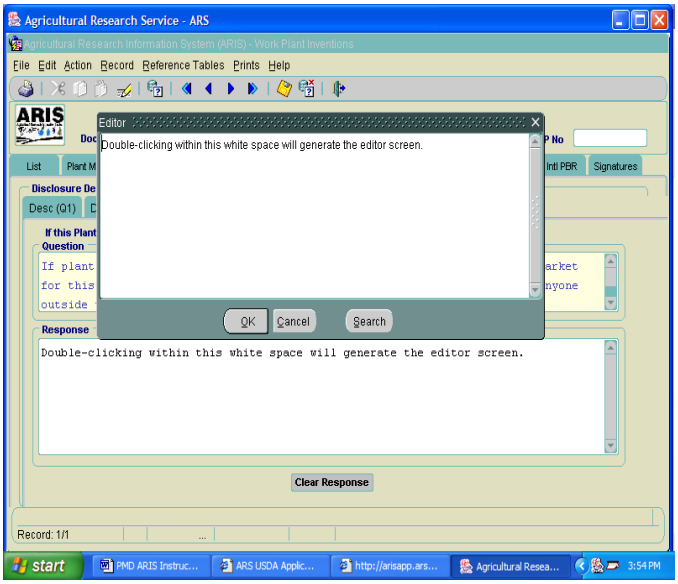
- Click the **Add Organization button** for a Non-ARS entry (nursery or other organization).



- Enter the non-ARS Nursery/Organization Name, Address, City, State, Country
- Click the ⬇ to copy the information into the Contact Info section. Complete the screen by entering the Name, Title, Phone, Fax, Email info
- Click the **Save button**

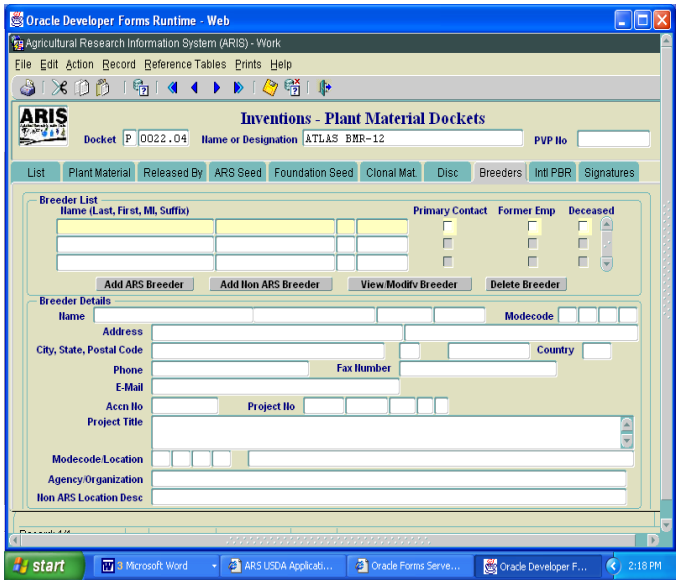


- Click the **Disc** tab & then click the **Desc (Q#)** tab to respond to each question
- Answer Questions 1-6 by using the Copy/Paste feature (Ctrl C/Ctrl V) from a Word document
- There is no line limitation in any of the response blocks
- Click the **Save icon** at the top of the screen after entering the response for each Question

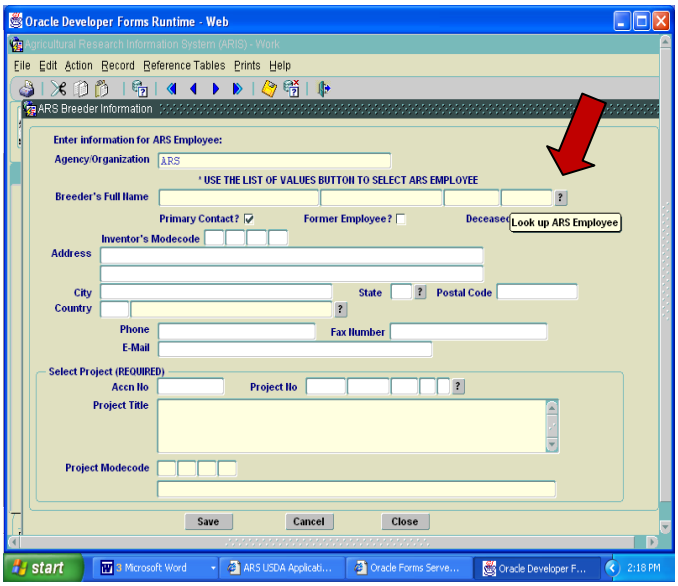


- **OPTIONAL:** Double-click within the white space to generate the Editor screen. Copy/Paste the response to the question.
- Click on the **OK button** to save the information.

TIP: Using the *Editor* feature in ARIS is always optional. Data can be typed into the response block (or use Ctrl C/Ctrl V to copy/paste from Word).

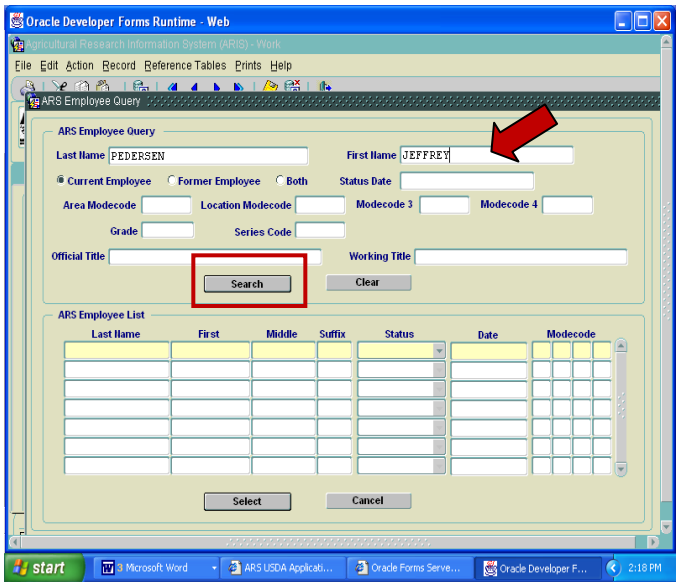


- Click the **Breeders** tab
- Click the **Add ARS Breeder button**



- Click the **LOV ? button** to the right of the **Breeder's Full Name** line to search for the Primary ARS Breeder to be identified and selected for entry.

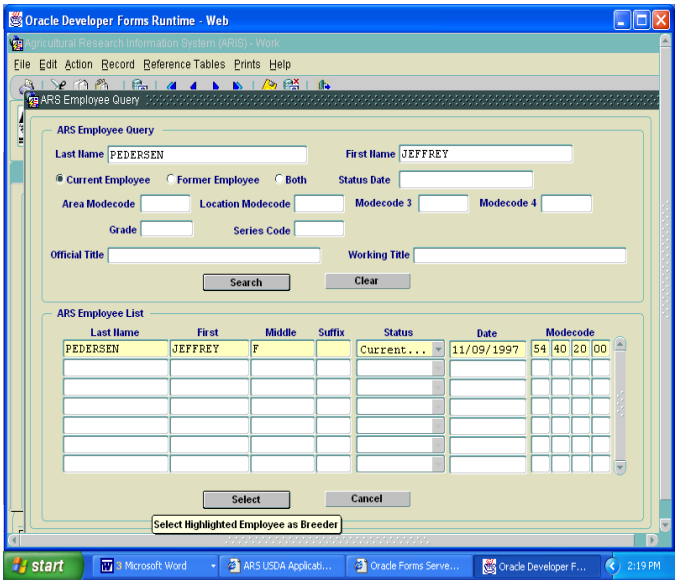
TIP: Don't try to select/enter anything else on this screen until the Breeder is selected. It's imperative that the step-by-step instructions be followed in order to obtain the correct data in the appropriate sequence.



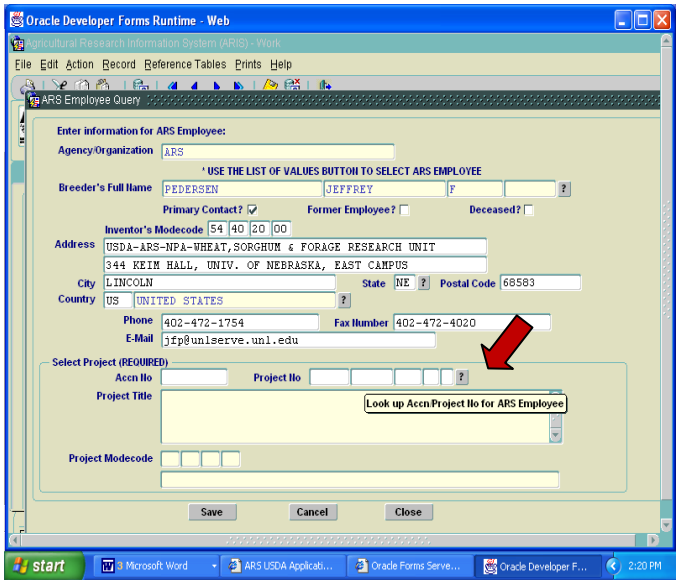
- Enter the Last Name and First Name
- Click the **Search button**

TIP: Selecting • Both will search for Current ***and*** Former employees.

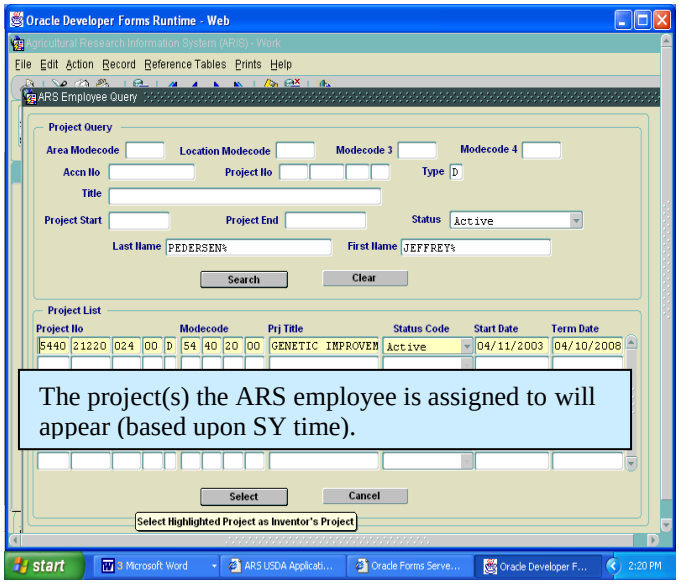
Using the Mode Code numbers, Grade, Series, Official Title, etc. is optional. The database search will work without that info.



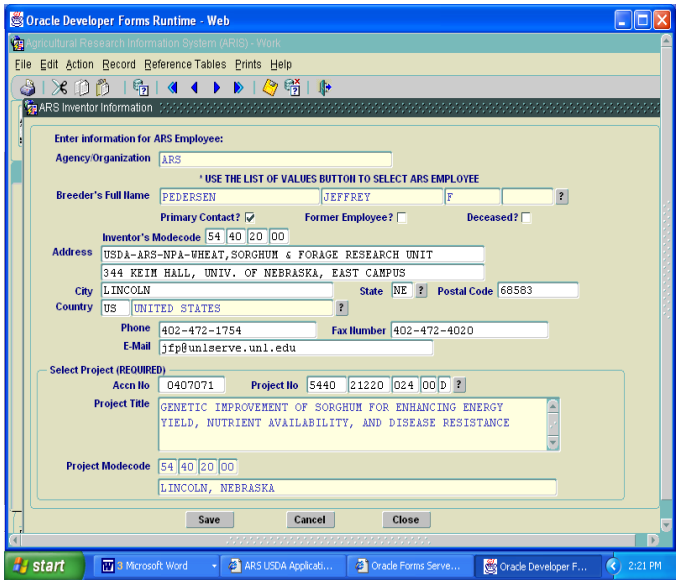
- **Highlight** the employee
- Click the **Select button**



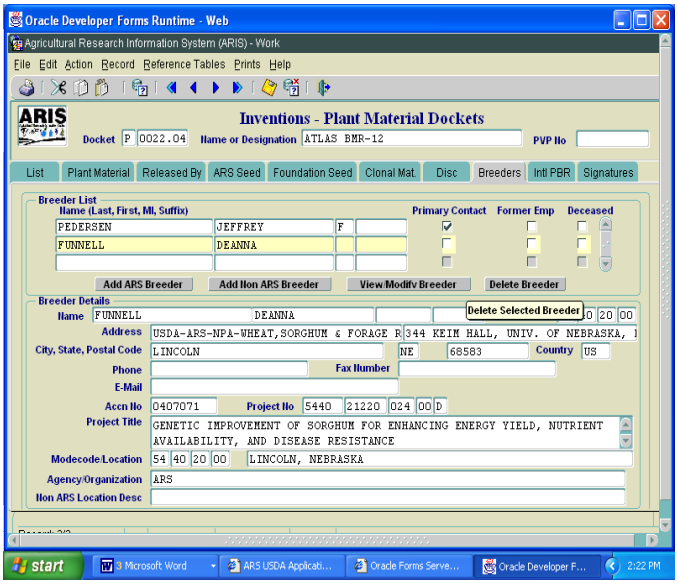
- Enter the ARS employee's Phone, Fax and Email
- Click the **LOV ? button** to the right of the Project No

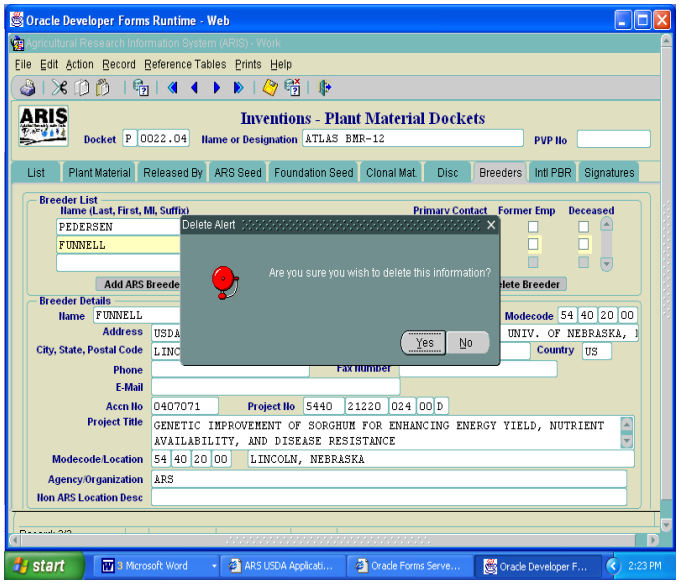


- **Highlight** the correct project
- Click the **Select button**



- Click the **Save button**
- **R**epeat the steps to add additional ARS breeders.





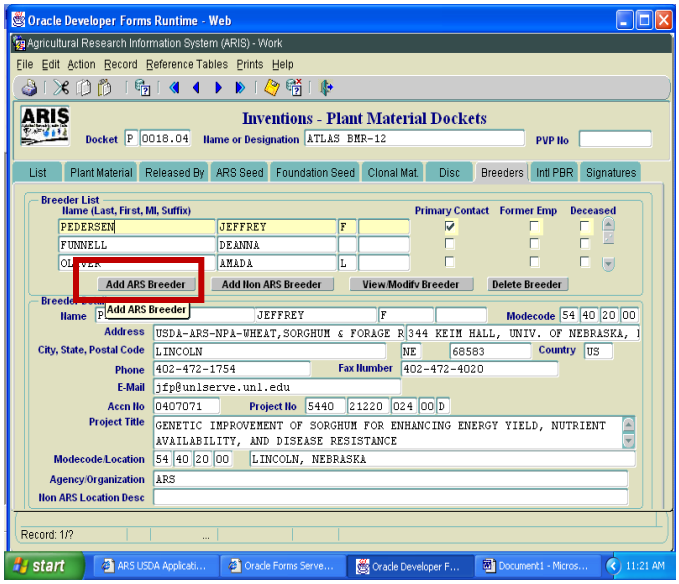
To Delete a Breeder entry:

- **Highlight the line**/name of the Breeder to be deleted
- Click the **Delete Breeder button**

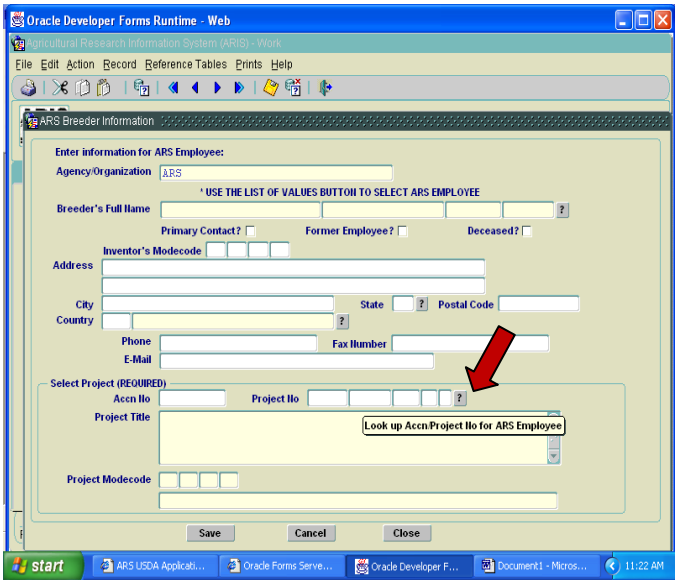
- Click the **Yes button** to confirm deletion of the highlighted Breeder entry

TIP: ***There are special steps required in order to add an ARS employee to the ARS Breeder list when that employee is not a Cat. 1 or 4***

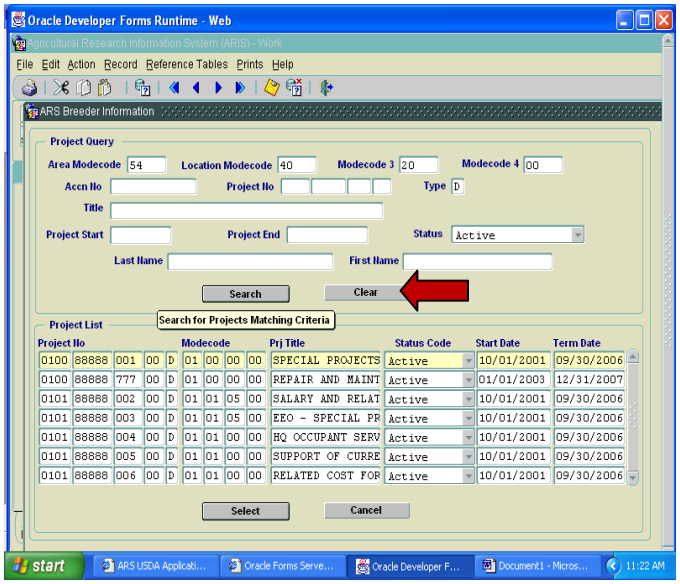
These steps must be followed to add an ARS Lab Technician or other non-Cat. 1 or 4 ARS employee having a role in the Plant Material release.



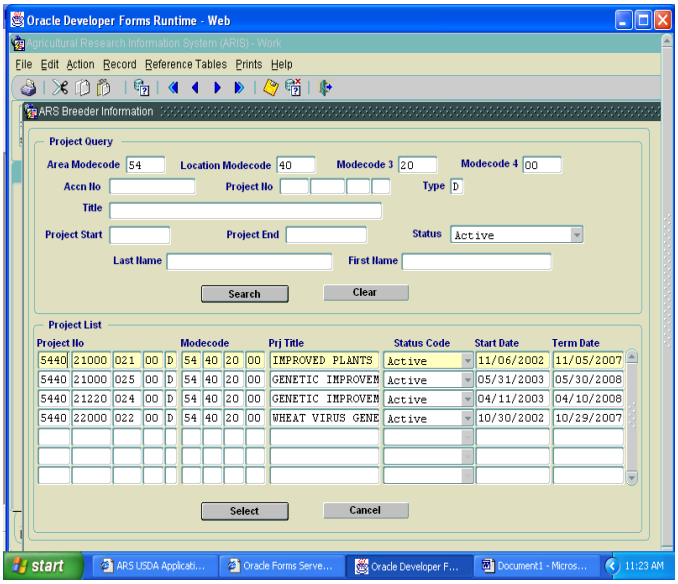
- Click the **Add ARS Breeder button**



- Click the **LOV ? button** to the right of the Project No.



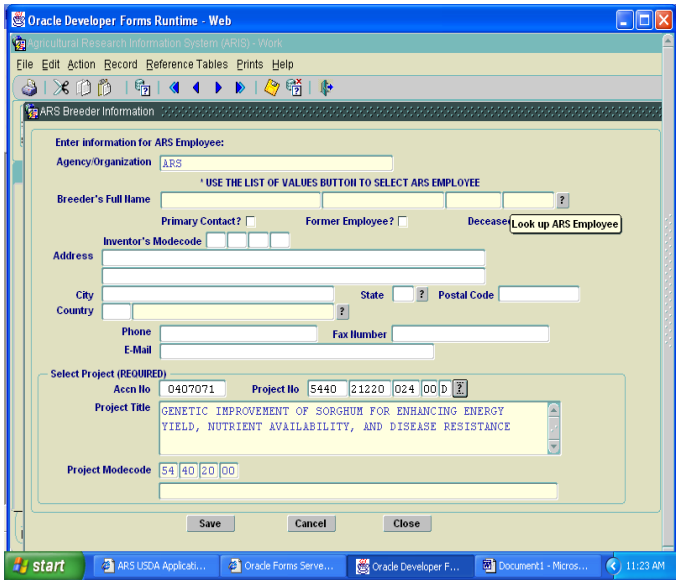
- ***VERY Important:*** Click on the **Clear button first**
- Enter the Unit Mode Code (two digits per box)
- Accession and/or Project #'s can be entered if known, but if they are not known it is okay to leave those two blocks blank as long as the next steps are completed
- Enter D in the Type box
- Click on the Status ▼ **drop down menu button** and select **Active** for Project Status
- Click the **Search button** (middle of the screen)



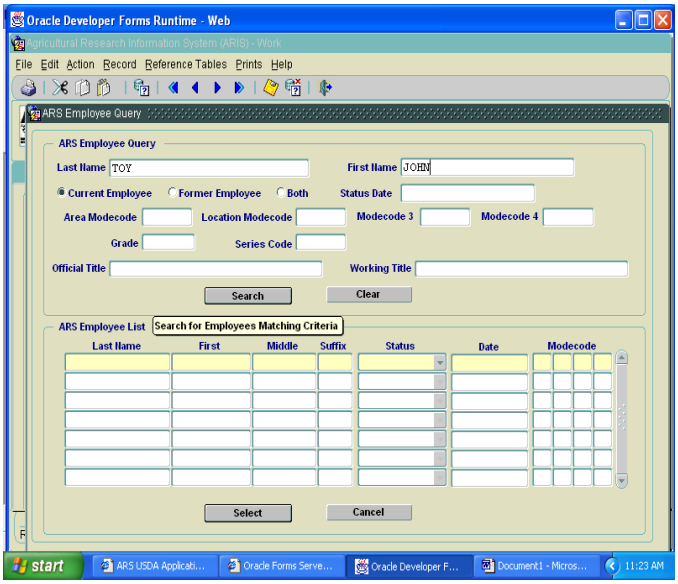
A list of the Active D projects under the Unit's mode code will appear.

- **Highlight** the correct Project No.
- Click the **Select button**

TIP: The project number **must** be identified and selected **PRIOR** to entering the rest of info (Name, Address, Phone, etc.), for the Non-Cat. 1 or 4 ARS employee (*i.e.*, Lab Tech)

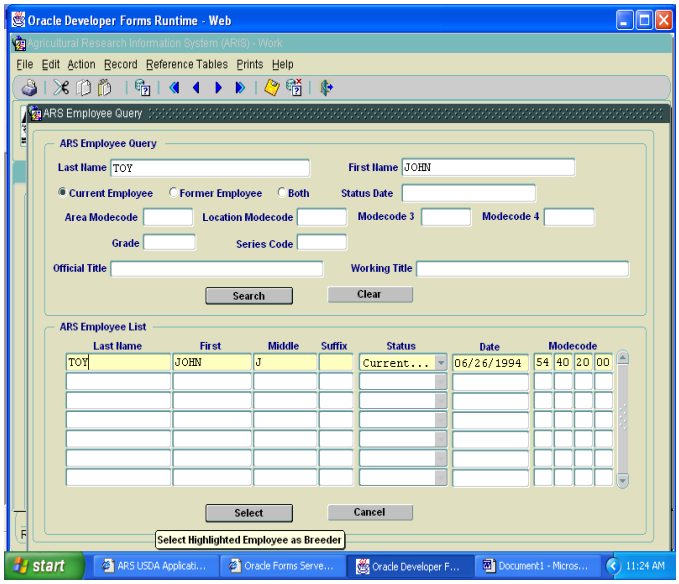


- Click the **LOV ? button** to the right of the **Breeder's Full Name** line

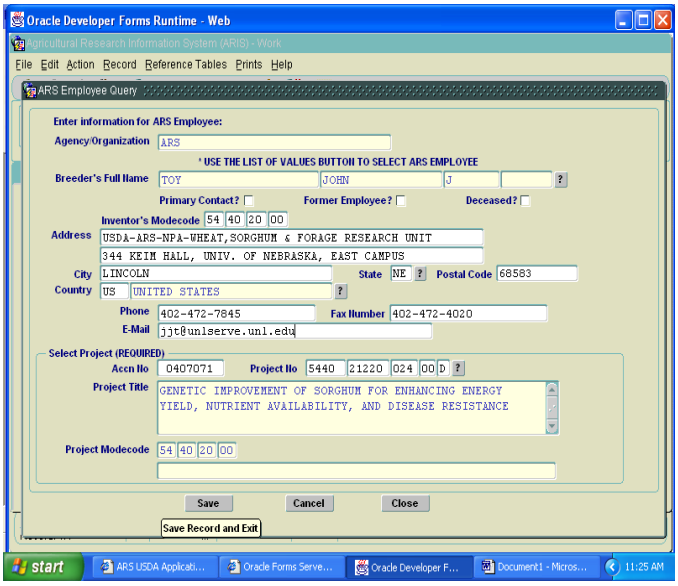


- Enter the ARS Employee's Last and First Name
- Click the **Search button**

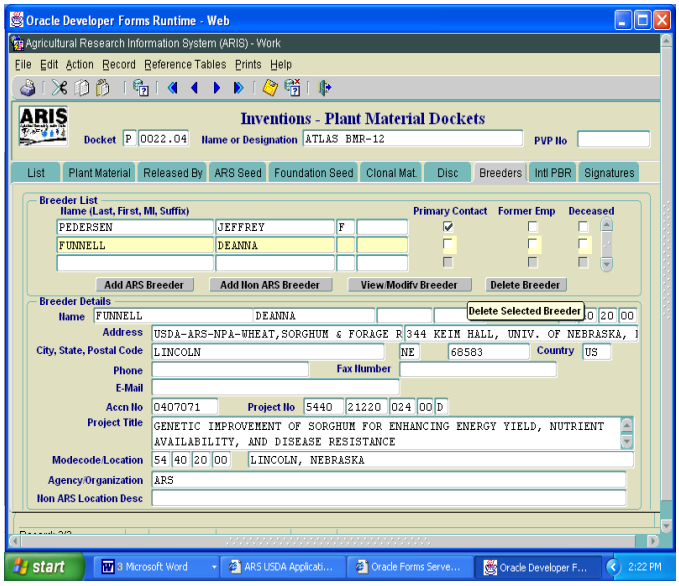
TIP: When • Both is marked it will search the database for Current **and** Former employees.



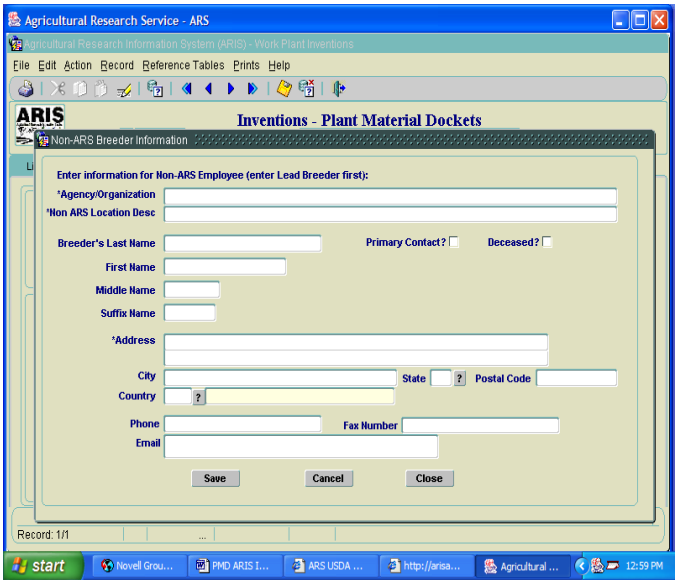
- **Highlight** the employee
- Click the **Select button**



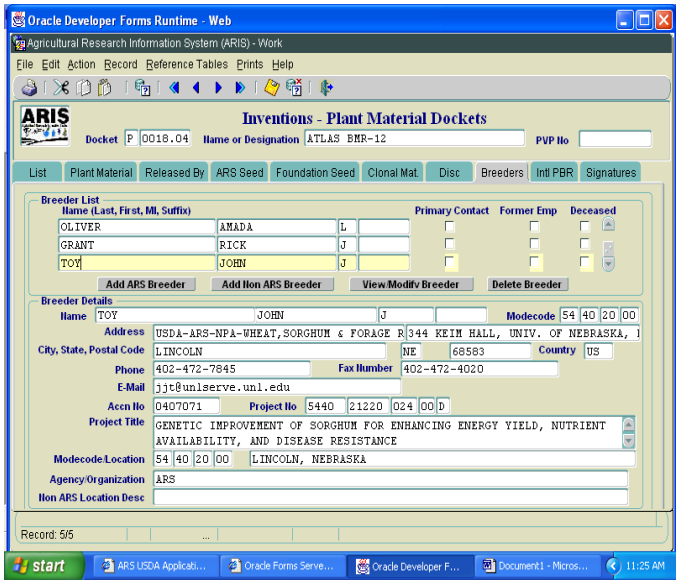
- Enter the Employee's Phone, Fax and Email
- Click the **Save button**



- Click on the **Add Non-ARS Breeder button** (if applicable) to add Non-ARS people involved in the Plant Material Docket release.

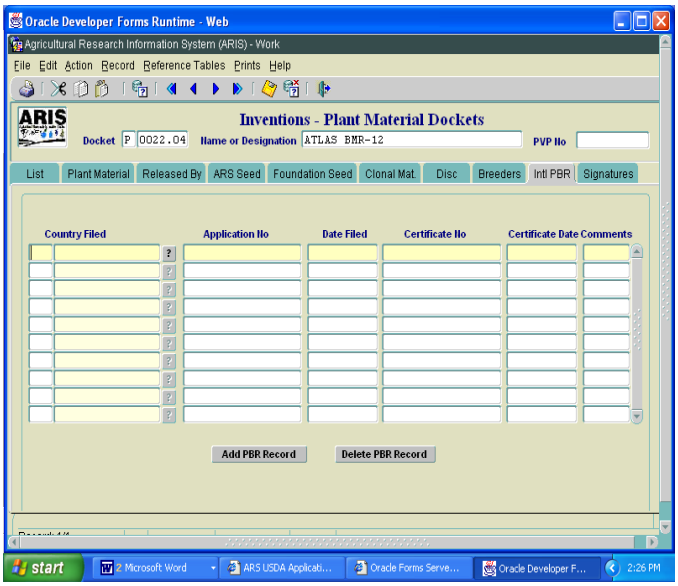


- Complete the information requested on this screen for Non-ARS Breeders.
- Click the **Save button**



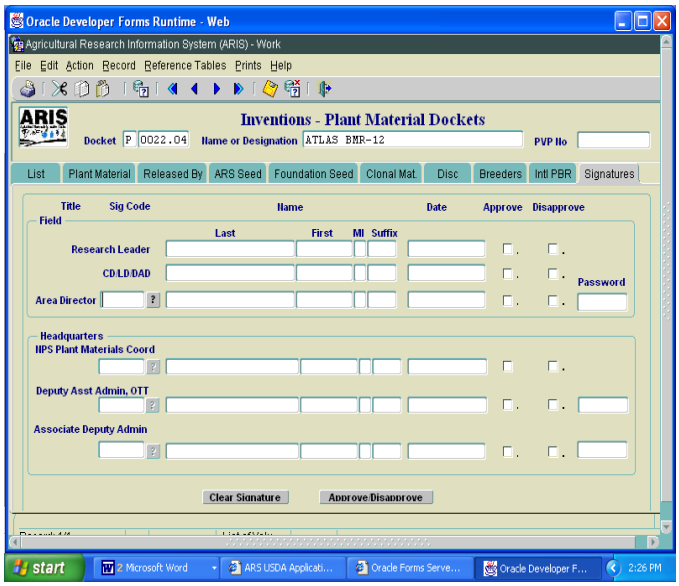
The screen above shows how the listing for all Breeders will appear (check names/information for accuracy by using the scroll bar to the right).

Modify/Delete by highlighting the desired name and clicking the applicable action button.



<u>DO NOT</u> use the Intl PBR tab, it is restricted to OTT data entry.

NOTE: The Intl PBR tab serves a separate purpose from the response given in Question #6 in the Desc tab section.



- Click the **Signature** tab
- Enter the Research Leader or CD/LD/DAD name
- Click on the □ under the Approve column (a Y or ✓ will appear in the Approve box)
- Click the **Approve/Disapprove button** to save and release to the next approval level. The Date of approval is generated by clicking on the Approve button

NOTE: The Save icon at the top of the screen does not work on this application.