Guide to BGCI's PlantSearch

Communication facility

BGCI's PlantSearch is a globally unique tool for sharing and accessing information about living botanical collections maintained by botanic gardens and similar organisations. PlantSearch connects collections directly to conservationists, educators, horticulturists, researchers, policy makers and many others who are working to save and understand plant diversity.

PlantSearch, which functions in combination with BGCI's GardenSearch, can be used to locate plants in botanic garden collections around the world and connect to staff who maintain those collections.

This step by step shows how to request information or material via BGCI's PlantSearch, instructions are also found in video form here.

Acknowledgements

The development of the BGCI's PlantSearch Communication Facility was made possible with the support of Cambridge University Botanic Garden.

Data in BGCI's PlantSearch is made possible by valuable data contributions by thousands of botanic garden staff around the world. BGCI is also grateful to Keith Damiani for designing and building the PlantSearch system and web app

Contents

Communication facility – General Information 2
Terms & Conditions for Information or Material Request 2
Making a Request for Information or Material 3
Managing My Requests 5
Managing Requests as a Garden Curator/Staff 6
Incoming Requests Settings 8
As non-garden staff 10

Communication facility – General Information

Help video

There are two routes to request information or material about a plant living collections held at a botanic garden.

For garden staff

Staff of a botanic garden listed in GardenSearch, are able to view the collections held by a particular garden and directly choose which garden to request information or material from. The botanic garden must be listed in GardenSearch and the staff linked to that garden. A login profile must be created.

For researchers or non-garden staff

For those not linked to a botanic garden, information or material can still be requested, but this request will be made blind (the system will send the request to all those garden holding that particular taxon in their collections).

Terms & Conditions for Information or Material Request

Intended Use: This service is designed to facilitate communication between plant collection holders, researchers, educators, and other plant conservation professionals. Its primary use it to request or share information or plant materials for research education and conservation purposes.

Please note the garden(s) you are requesting material or information from are under no obligation to reply, please be respectful of their decision. BGCI takes no responsibility for the accuracy of the information shared, nor is it directly involved or responsible for the exchange of material.

Note when sharing plant material: In recognition of and alignment with the Convention on Biological Diversity (CBD), most material exchanges between botanical gardens and research institutions are exchanged under the following conditions:

- The material will be used for the common good in the areas of research, education, conservation and the development of botanical gardens;
- Information on the material will be appropriately stored and the connection between the information and the material will be maintained;
- If scientific publications are produced on the plant material provided, the origin of the material must be cited. In addition, the provider garden would expect to receive a copy of these publications.
- Permission must be sought from the provider garden if the recipient seeks to commercialise either the genetic material, its products or research derived from it. Such commercialisation will be subject to the conditions of a separate agreement with the country of origin.
- In case of material becoming invasive in the recipient's region, the provider garden takes no responsibility for the consequences.

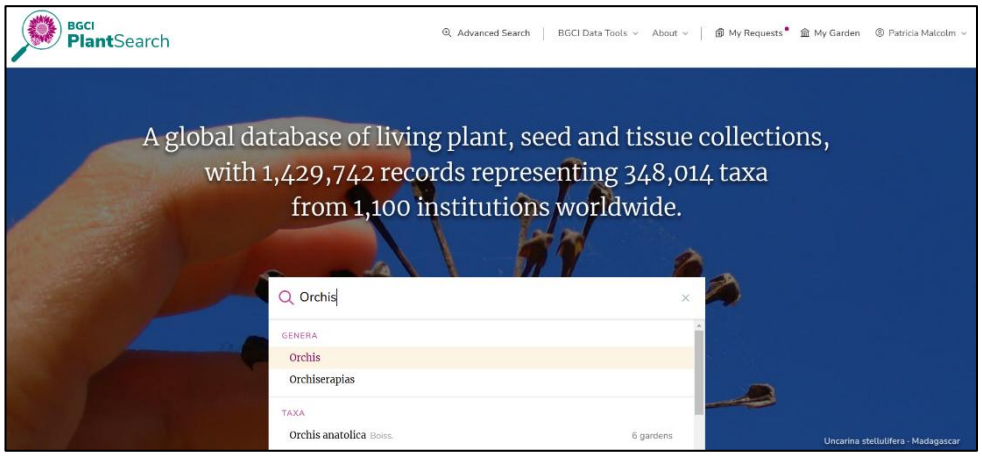
Please also refer to each individual gardens' material exchange transfer agreements (MATs).

Search results will include all relevant taxa based on the search criteria entered, along with family name, nomenclatural status, and the number of botanic gardens (*ex situ* sites) which report each taxon in their collections.

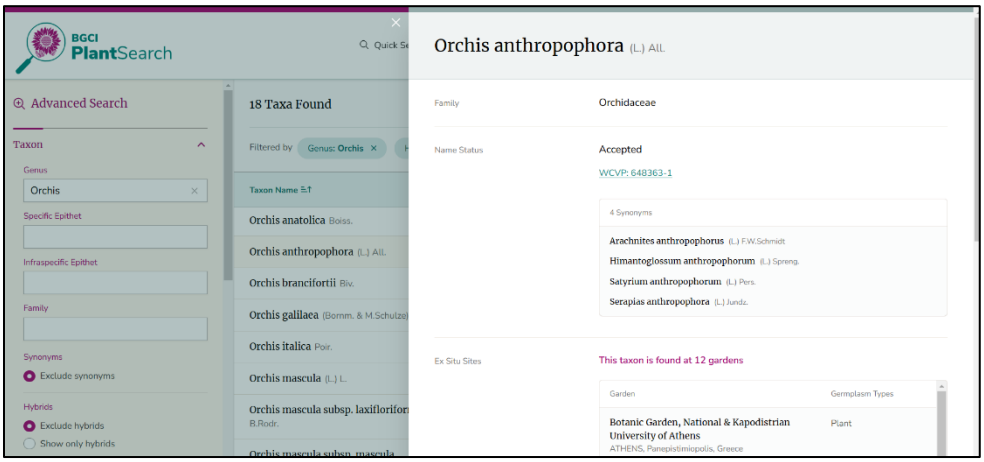
Making a Request for Information or Material

Select a taxon and garden(s) to Request Information or Material

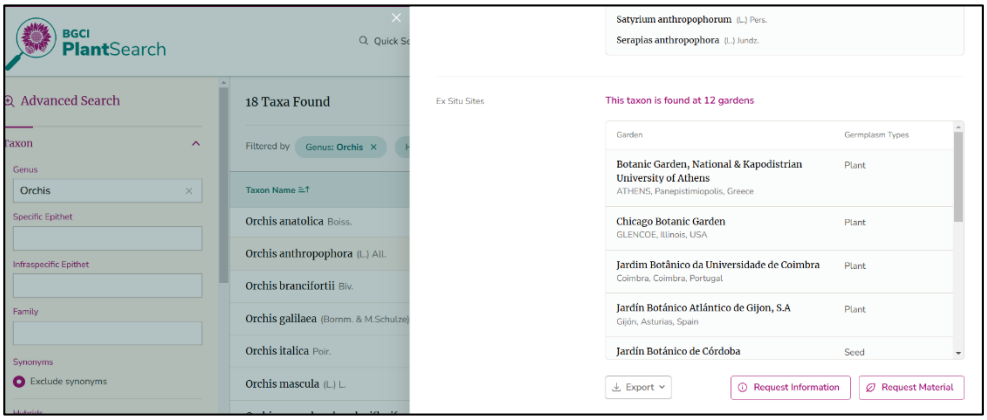
1. Search for a taxon either on the Quick Search or Advance Search. The Advance Search allows filtering options such as Threatened Status, Germplasm type, and other variables.



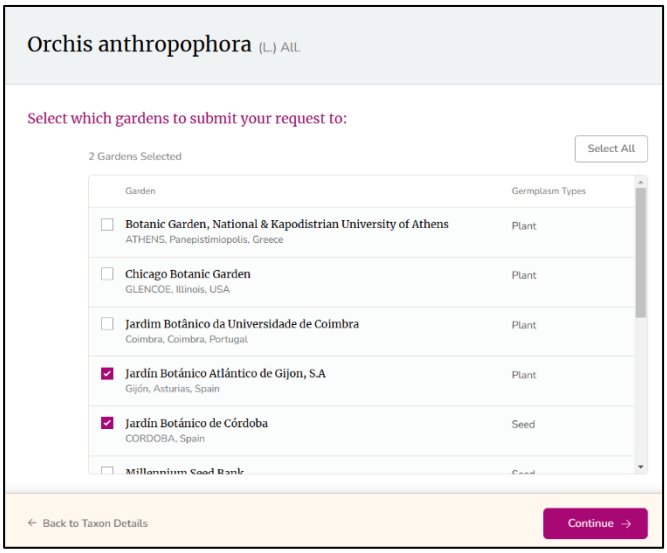
2. Click on the taxon of choice. A window will open on the right.



3. Scroll down to the Ex Situ Sites and choose either Request Information or Request Material

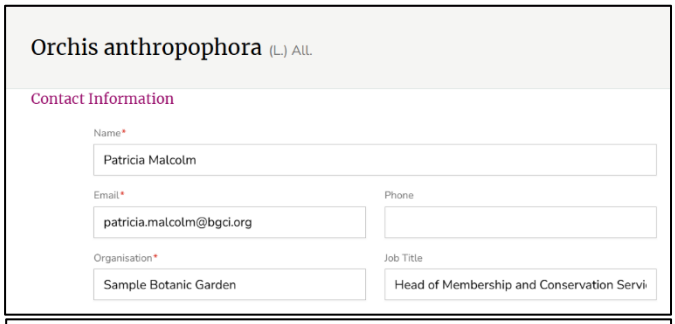


4. Select the garden(s) that to Request Information or Material from.

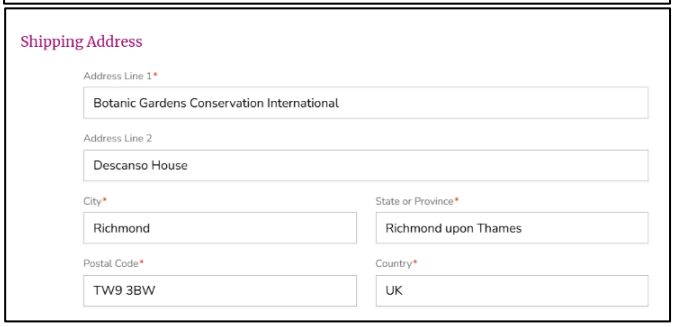


Fill in the request form

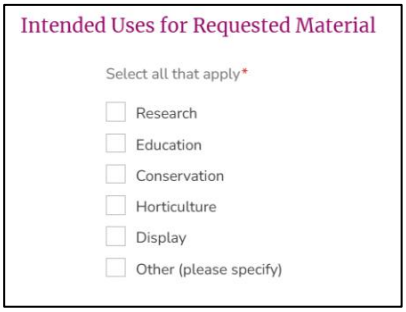
5. Fill in Contact information. This information can be edited in this window, and also in the Profile (see section on Request Settings).



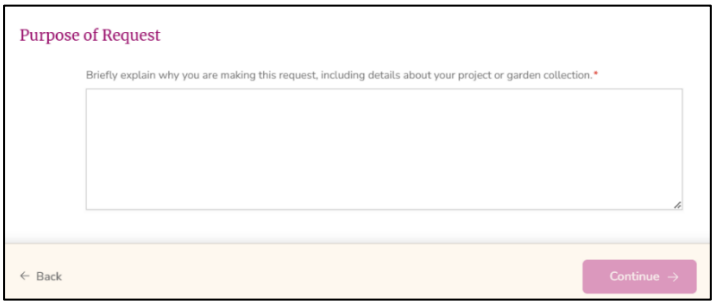
6. For material requests, fill in the shipping information.



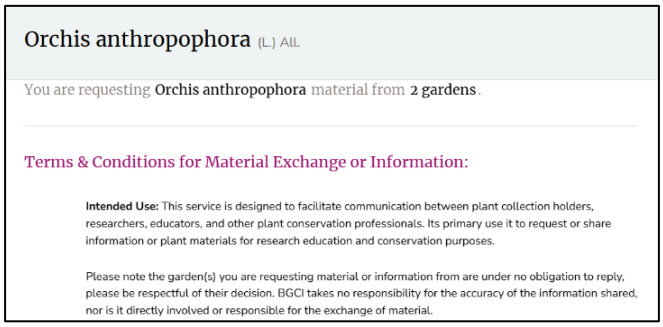
7. For material requests select the type of material required and the intended use(s) for that material.



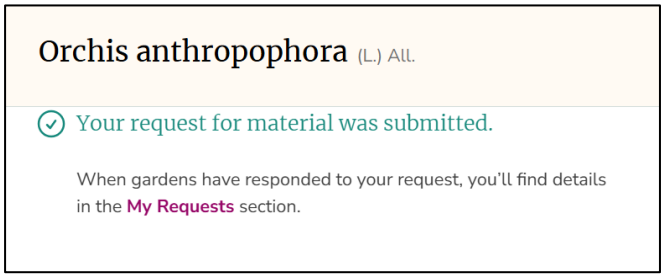
8. Briefly explain the purpose of the request, giving enough information to the garden. And click Continue.



9. Agree to the Terms and Conditions and Submit. (Full terms and conditions are explained above). Each of the gardens selected (or if a blind request is done all the gardens with that taxon) will receive a notification, but they are under no obligation to reply.

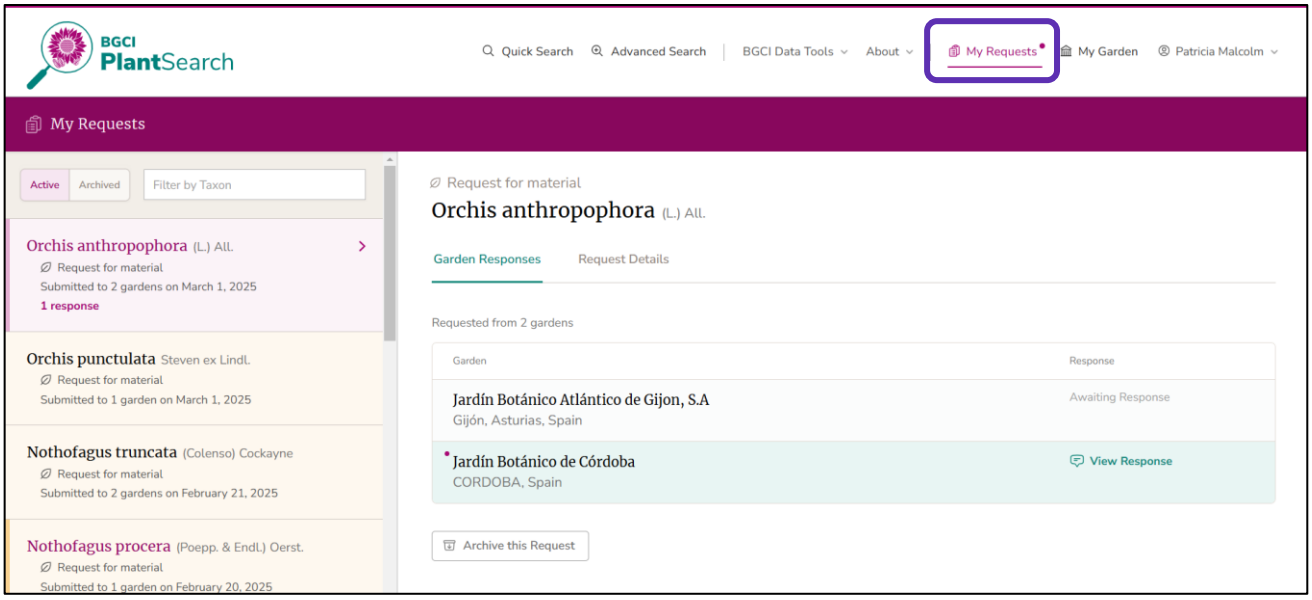


10. The request is submitted. Click on My requests to view all.



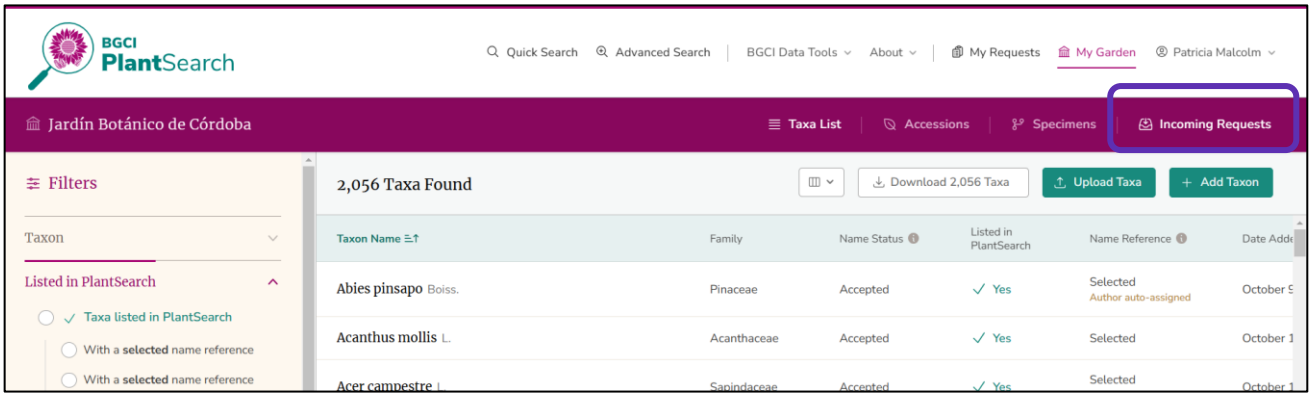
Managing My Requests

Click on the top menu for My Requests to list all the current requests on the left-hand side. A pink dot next to My Requests indicates that a message has been received. Requests can be changed under request details and also they can be archived. When archiving a request, it will no longer be available for the garden to view or reply.

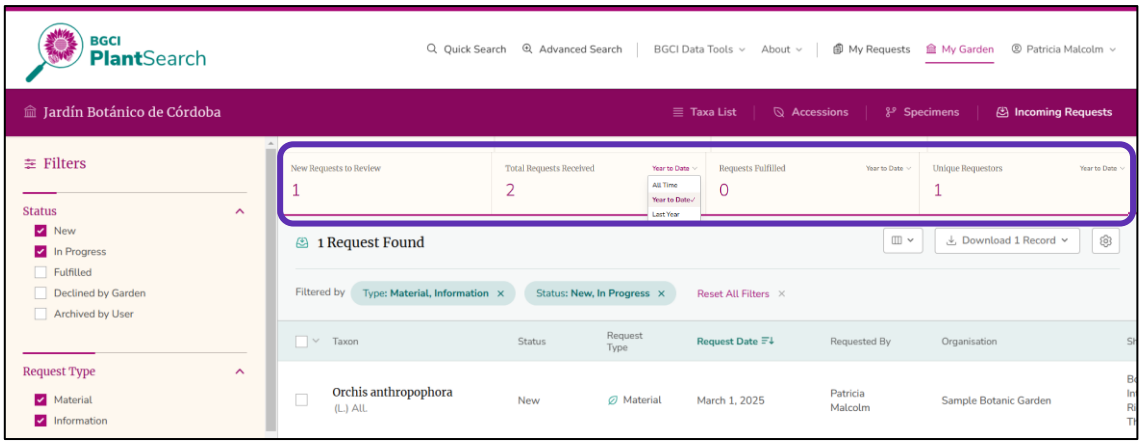


Managing Requests as a Garden Curator/Staff

As a garden curator/staff to view the Incoming requests click on My Garden and then on the Incoming Requests tab. A log into PlantSearch and being linked to a garden listed in GardenSearch are required.

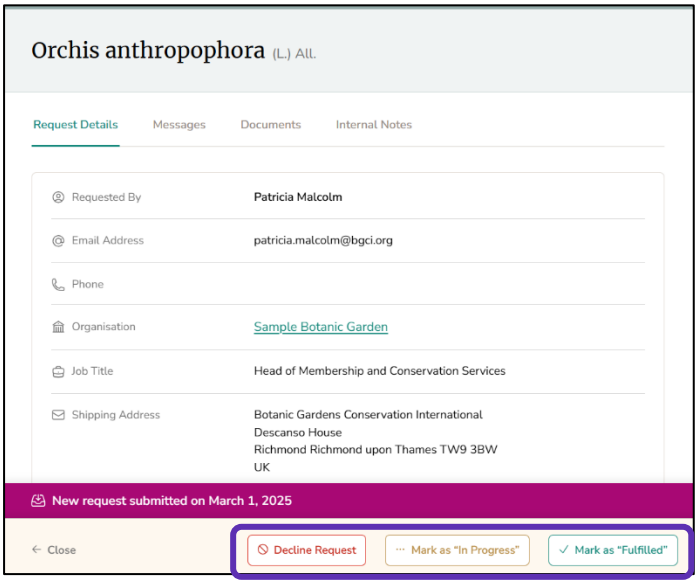


Under Incoming Requests a dashboard indicates the New requests awaiting to be reviewed, Total requests received, fulfilled and how many Unique Requestors. Use the several filters on the left and results can be sorted, filtered and/or downloaded, and the time scale on the top menu.



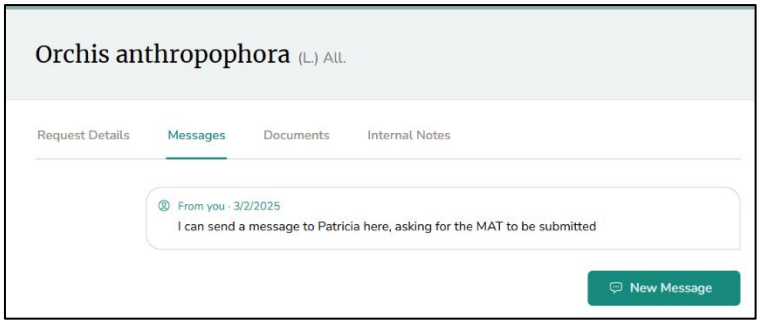
The request for material by Patricia Malcolm can be seen in the Incoming Requests area. Expand the request for more information by clicking on it. The request can be

- **Declined** it will show as declined in the requestor area.
- **Marked as In Progress** meaning the garden is assessing whether the material or information is available, or while MTAs are signed
- **Marked as Fulfilled** if the request for information or Material is sent.

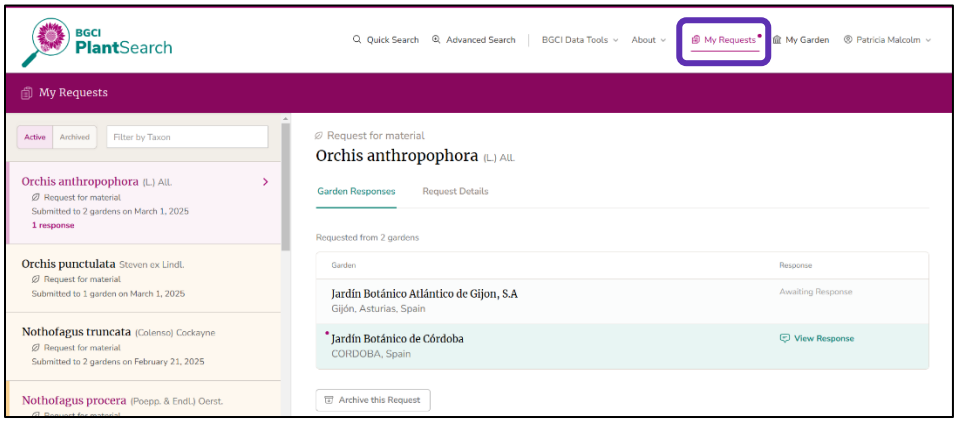


Communication between requestor and garden curator/staff

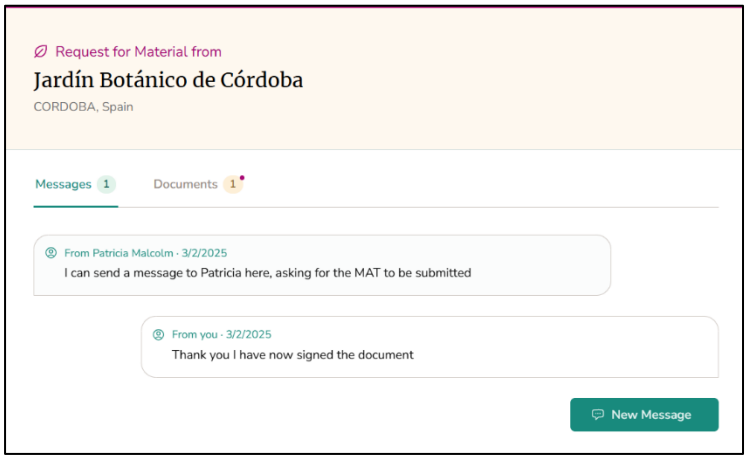
Note: BGCI strongly recommends communicating via the tool, as it will allow us collectively to monitor exchange of material, and provide the information to the CBD to champion exchange of material for scientific purposes.



Once the garden sends a message to the requestor, a notification will appear on the requestor's profile

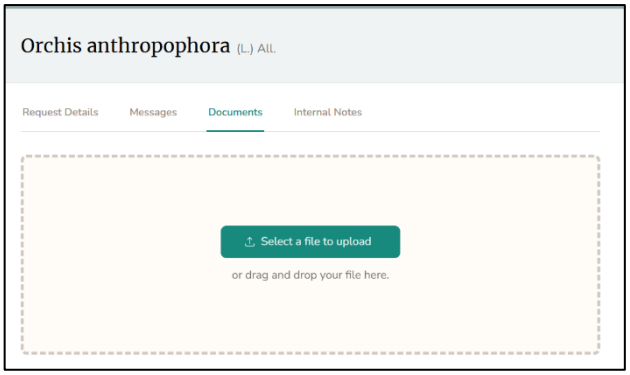


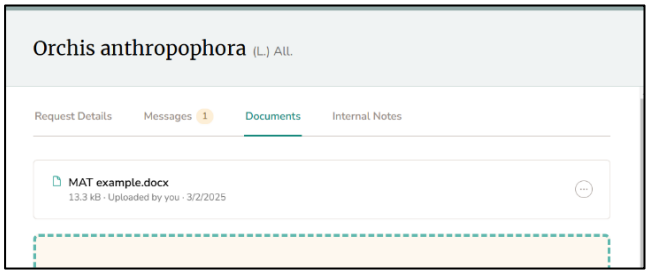
The requestor can then reply to this message



Uploading documents

Documents can be sent to the requestor, either to fulfil the request for information or send them a MAT to fill in and return via the tool. More than one document can be added or removed. Simple Select a file or drag and drop a file onto the box.

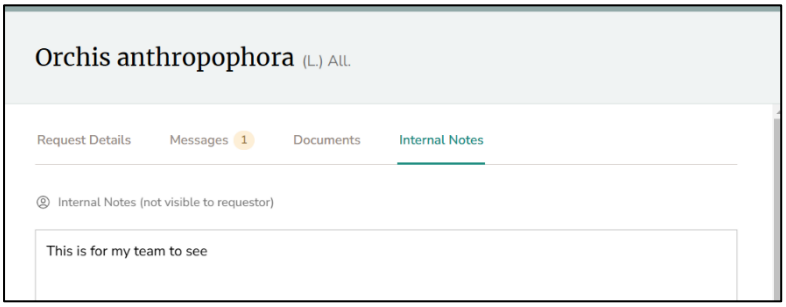




The requestor will receive a notification when a document is uploaded and viceversa.

Internal Notes

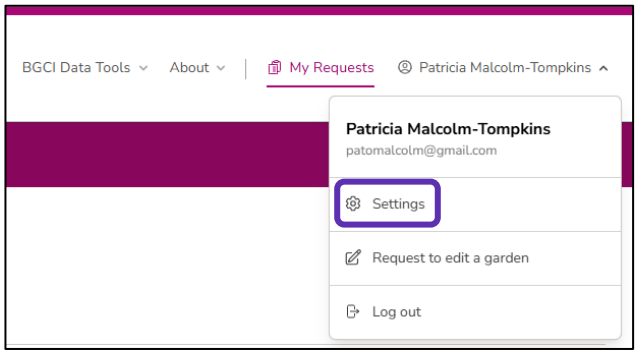
These are used to add information to the request not seen by the requestor. But the notes can be seen by other garden staff.



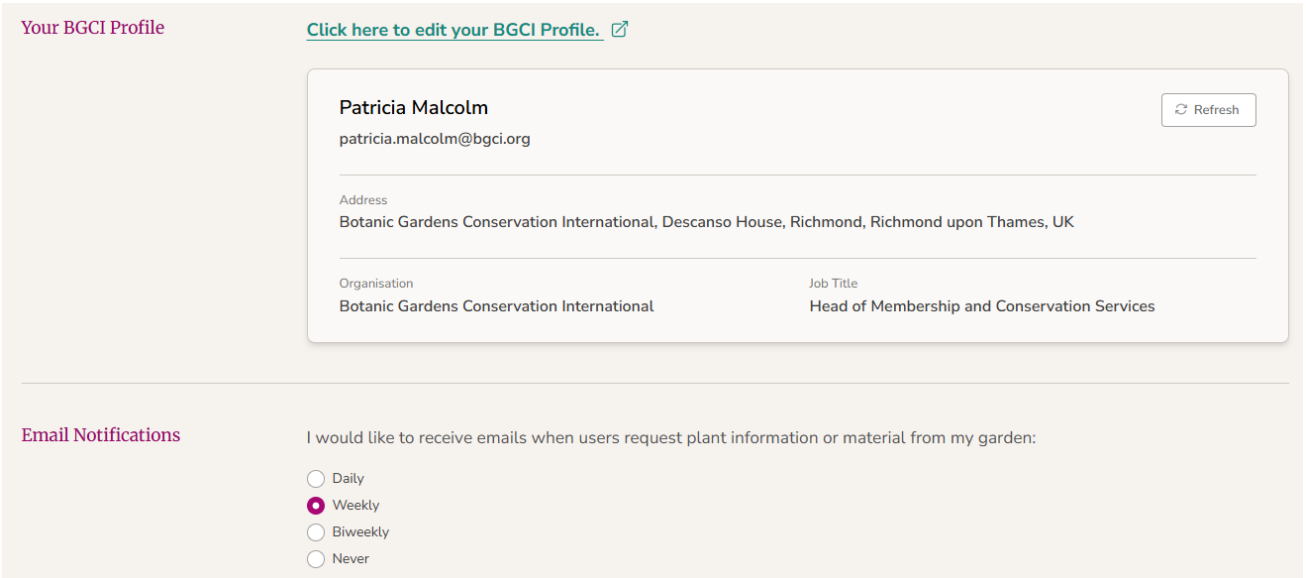
Request Settings

As requestor

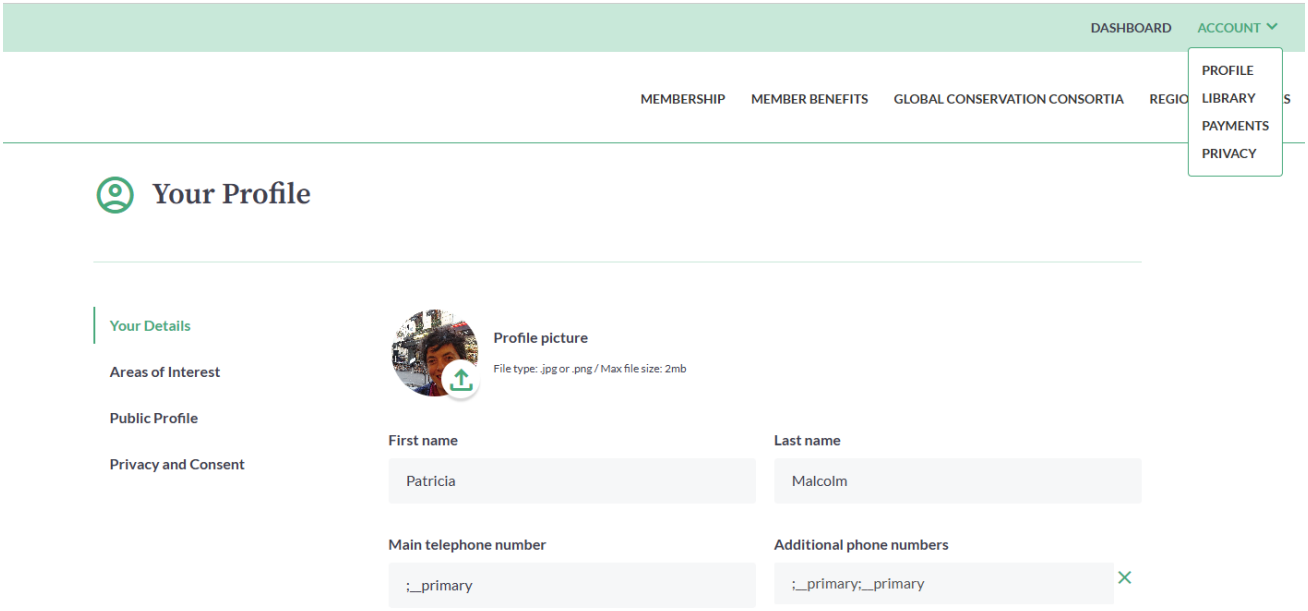
An individual requestor can manage email notifications from the profile and change profile information. Click on the Settings wheel under the name.



Email notification frequency can be changed here and Edit the BGCI profile to change organisation information or job title.

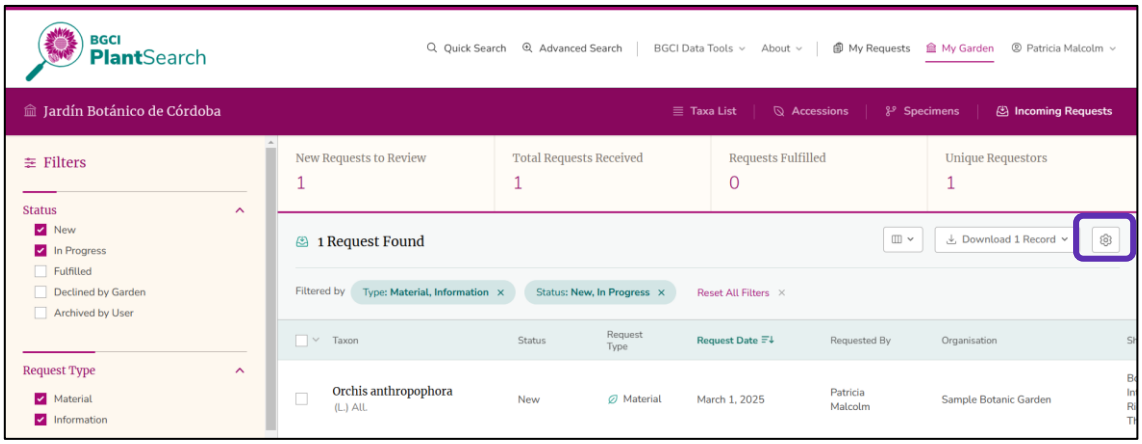


The Click here to Edit Your Profile links to the BGCI SheepCRM App, please update the organisation information and jobtitle here. This information will be refreshed in PlantSearch.



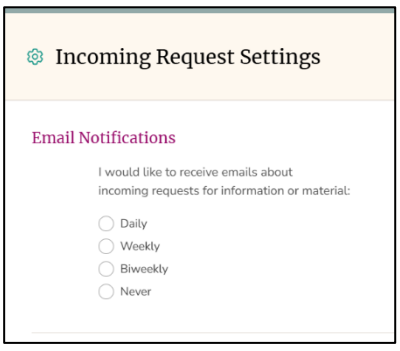
As garden staff

As Garden staff, click on the Settings wheel to set up general setting for the garden when an incoming request arrives.



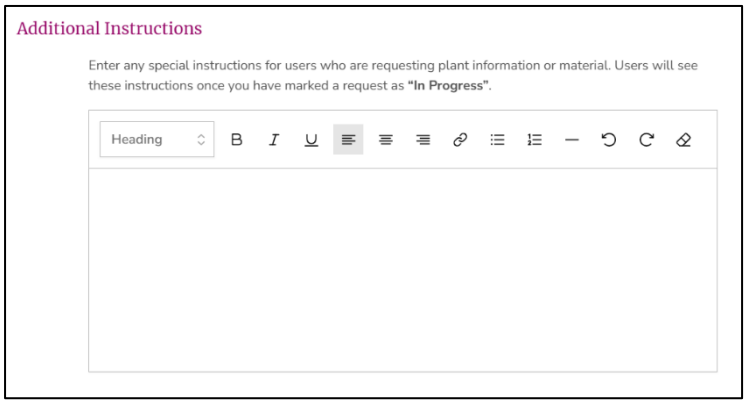
Email Notifications

In this area the garden curator/staff can set the frequency of emails notifications to Daily, Weekly, Biweekly or Never. Please make sure that at least one of staff member of the garden has email notifications on.



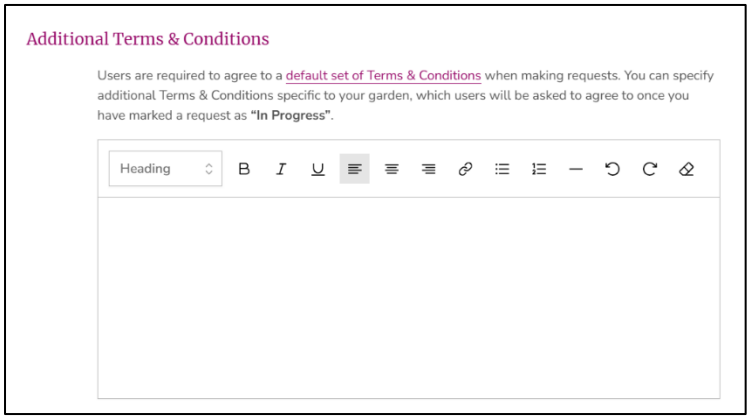
Additional Instructions

Set up a message that is sent to all requestors once a request is marked as In Progress, such as “this request for information or material has been accepted, it is currently being processed, please refer to our garden terms and condition and sign the relevant MTA documentation”.

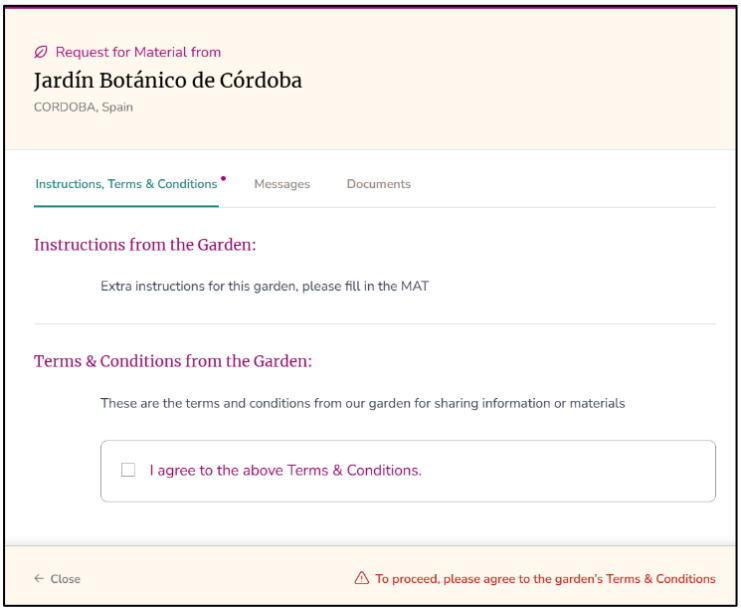


Additional Terms and Conditions

Different gardens have specific Terms and Conditions particularly when exchanging plant material. In this section a specific garden Terms and Conditions can be added, and the requestor must agree these to proceed. **Change the Status of the request to In Progress**

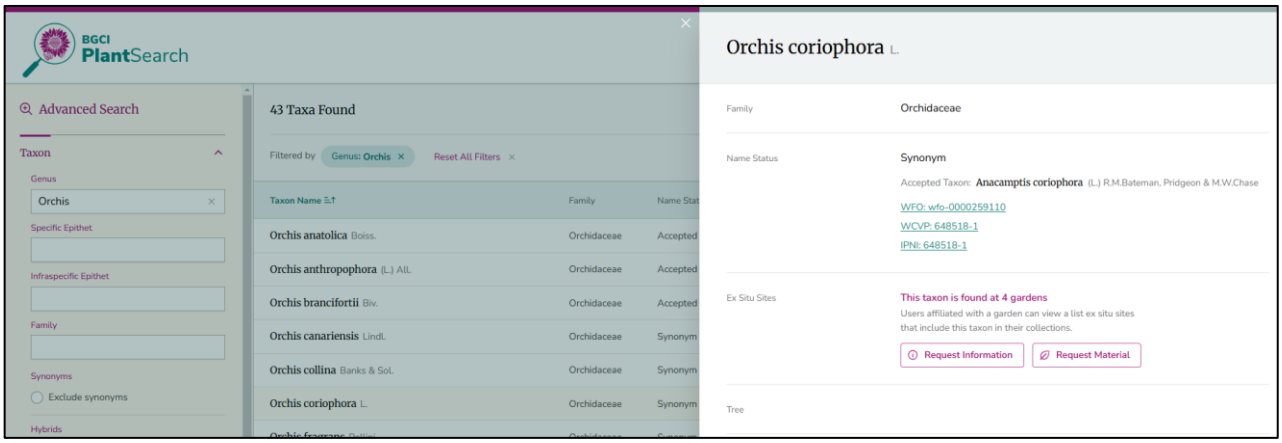


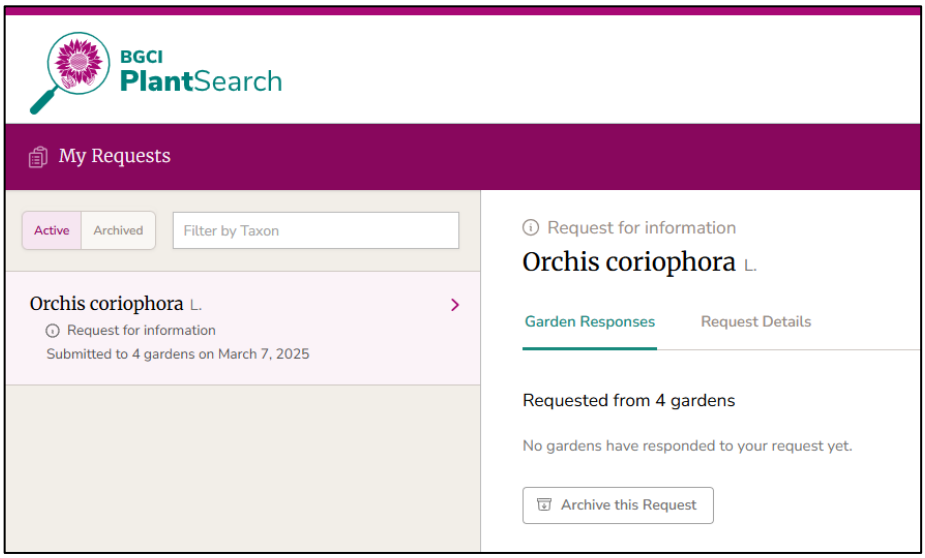
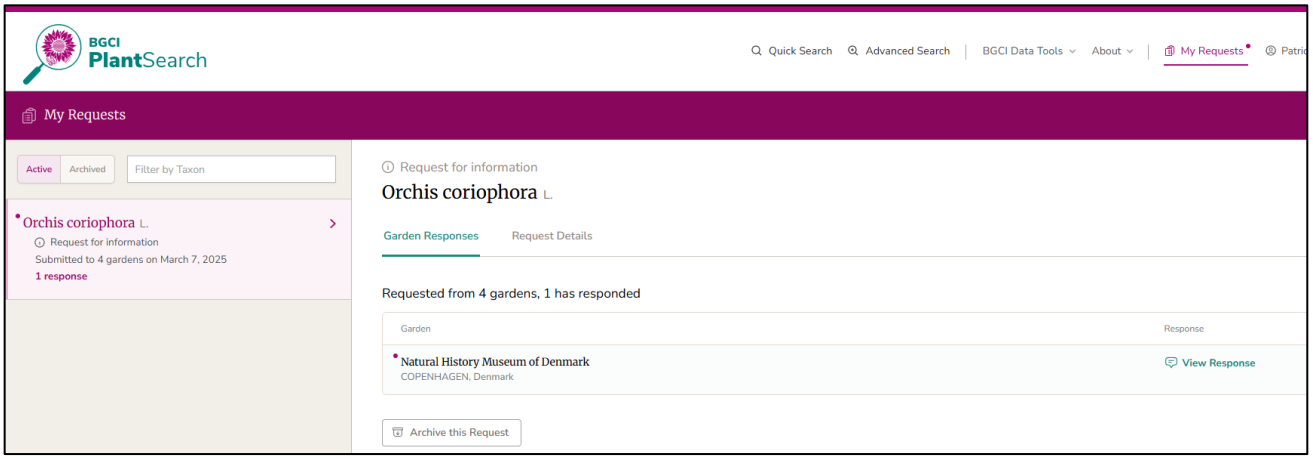
Requestor’s view of the Additional Instructions and additional Terms and Conditions set by the garden



As non-garden staff

University students, researchers, forestry departments and other interested parties in living collections, can also use this tool. With the difference that the request for information or material will be done blind. Non-garden staff must be registered to use the tool, the main difference is that ex situ sites won’t be visible.





Search the interested taxon and request for information or material. Once a garden has accepted to fulfil the request, information on that garden will appear on My Requests area.