# Standard Operating Procedure

| | |
|---|---|
| Number: | **001** |
| Name: | **SOP instructions** |
| Title: | Instructions for drafting, releasing and revising Standard Operating Procedures (SOP) on the EU Pollinator Hub |
| Category: | General |
| Status: | Approved |
| Version: | 1.0 |
| Date: | 2023-06-30 |
| Author: | Michael Rubinigg |

This document is intended for the regulation of processes within the EU Pollinator Hub. It is published under the CC BY 4.0 licence. You may distribute, transform, adapt and build upon the material in any medium or format, including for commercial purposes, as long as you give credit to the author.

# Table of contents

1 Document history ..... 3
1.1 Current Release ..... 3
1.2 Change history ..... 3
2 Abbreviations ..... 4
3 Introduction ..... 5
4 Validity ..... 6
4.1 Area ..... 6
4.2 Time ..... 6
4.3 Related Documents ..... 6
4.4 Related Tasks ..... 6
5 Procedure ..... 7
5.1 Drafting ..... 7
5.2 Further processing ..... 10
6 References ..... 12
7 Annexes ..... 13

# 1 Document history

## 1.1 Current Release

### 1.1.1 Drafted

Submitted on 2023-06-05 by Michael Rubinigg, quality manager.

### 1.1.2 Reviewed

Reviewed on 2023-06-30 by Noa Simòn Delso, general manager.

### 1.1.3 Approved

Approved on 2023-06-30 by Michael Rubinigg, quality manager.

## 1.2 Change history

n.a.

# 2 Abbreviations

| | |
|---|---|
| EU | European Union |
| EUPH | EU Pollinator Hub |
| ID | Identifier |
| n.a. | not available |
| SOP | Standard Operating Procedure |

# 3 Introduction

Standard operating procedures (SOP) are documented procedures which describe how and by whom activities are carried out. Following the recommendations of Hollmann and co-workers [1], the purpose of the present SOP is the description of specific rules for drafting, releasing and revising standard operating procedures to ensure a standardised format, content and workflow. It contains specific instructions on the content to be included in an SOP.

# 4 Validity

## 4.1 Area

The of validity of this document is limited to drafting, release and revision of Standard Operating Procedures (SOP) by the team of the EU Pollinator Hub (EUPH).

## 4.2 Time

The period of validity of this SOP begins on 2023-06-30 and ends with its revocation.

## 4.3 Related Documents

| Document type | Document ID | Title |
|---|---|---|
| SOP | 004 | Organisation chart |
| SOP | 016 | Release management |

## 4.4 Related Tasks

Persons who have been assigned one of the following tasks, as defined in SOP-004, assume a responsibility within this SOP:

- Quality management

# 5 Procedure

## 5.1 Drafting

### 5.1.1 General rules

#### 5.1.1.1 Editing

- The person responsible for quality management provides a template in an appropriate format, which shall be used for drafting a Standard Operating Procedure.

#### 5.1.1.2 Text

- In the present SOP, text to be included as such in the SOP to be drafted is written in ***bold italic***, information intended as placeholder is written between [square brackets].
- Text in the SOP shall appear as follows:
  - General: Font type Calibri, full justified; line spacing 1,5 lines
  - Body text: Font weight normal; font size 11 pt
  - Headers: Font weight normal; font size 14 pt (first level), 13 pt (second level), 12 pt (third level), 11 pt (fourth level)
- Page breaks
  - A page break is inserted before each first level header.

#### 5.1.1.3 Dates

- Dates are given in the following format, including a leading zero: [YYYY-MM-DD]

#### 5.1.1.4 Document header

The document header contains information on the institution by which the SOP has been issued.

- Even page numbers: Name of the institution (***EU Pollinator Hub***), left aligned
- Odd page numbers: ***SOP*** [number of the SOP] [short name]***, Version*** [version number], left aligned; logo of the institution, right aligned.

#### 5.1.1.5 Document footer

- The document footer contains information on the page number:
  - Even page numbers: ***Page*** [current page number] ***of*** [total number of pages], left aligned
  - Odd page numbers: ***Page*** [current page number] ***of*** [total number of pages], right aligned

### 5.1.2 Cover page

- The cover page contains a summary of the most important control information of the SOP required to configure management and compliance standards:
  - ***Number:*** A consecutively numbered, three-digit identifier including leading 0 of the SOP starting at 001 written in **bold letters**.
  - ***Name:*** A clear, concise and unique title of the SOP containing no more than 30 characters including blank spaces, written in **bold letters**.
  - ***Title:*** A title clearly describing the scope of the SOP containing no more than 256 characters including blank spaces.
  - ***Category:*** One of the following categories to which the SOP belongs: ***General*** | ***Data management*** | ***Data life cycle management*** | ***Metadata*** | ***Audit***
  - ***Status:*** One of the following status information: ***Draft*** | ***Approved*** | ***Expired***
  - ***Version****:* Version number.
  - ***Date****:* Date of release (coming into force) of the SOP.
  - ***Author****:* Name of the author(s) of the SOP.
  - Disclosure rules: Text containing the explicit statement by whom the document is intended to be used as well as to whom, by whom and for which purpose the document may be disclosed.

### 5.1.3 Table of contents

- Section ***Table of Contents*** includes the table of contents at two levels and the respective page number.

### 5.1.4 Document history

- Section ***1 Document history*** contains information on the first version of an SOP and all subsequent versions.

#### 5.1.4.1 Current Release

- Section ***1.1 Current Release*** contains the following technical information in the release:
  - Section ***1.1.1 Drafted*** contains date of submission as well as name and role of the author(s) of the document.
  - Section ***1.1.2 Reviewed*** contains date of the review decision as well as name and role of the person responsible for reviewing the document, as defined by SOP-016.
  - Section ***1.1.3 Approved*** contains date of approval as well as name and role of the person responsible for approval of the document, as defined by SOP-016.

#### 5.1.4.2 Change history

- Section ***1.2 Change history*** contains the following information on all previous versions:
  - ***Version:*** Version number of the release.
  - ***Date:*** Date of approval of version.
  - ***Author:*** Author(s) of the version.
  - ***Modification:*** Overview on modification(s).
  - ***Reason:*** Reason for modification(s).

### 5.1.5 Abbreviations

- Section ***2 Abbreviations*** contains a list of words, terms, acronyms and abbreviations used in the document in increasing alphabetical order.

### 5.1.6 Introduction

- Section ***3 Introduction*** contains a concise summary of the purpose and the content of the SOP. It contains the following statements:
  - Identification of the specific reasons for which the SOP has been drafted (Why?).
  - Identification of the processes ('actions do get the work done') targeted by the SOP.
  - Identification of the procedures ('description of those actions') covered by the SOP.

#### 5.1.6.1 Definitions

- Section ***3.1 Definitions*** contains definitions of terms used in the SOP.

### 5.1.7 Validity

- Section ***4 Validity*** contains information for which subject(s), area(s) and role(s) within the organisation and for which time scale the SOP applies.

#### 5.1.7.1 Area

- Section ***4.1 Area*** defines the area within the organisation to which the SOP applies.

#### 5.1.7.2 Time

- Section ***4.2 Time*** defines at which date the SOP becomes affective and expires.

#### 5.1.7.3 Related Documents

- Section ***4.3 Related Documents*** contains a tabular summary of the document type, document identifier and the (short) name of all quality assets generated by the EUPH to which the SOP relates.

| Document type | Number | Name |
|---|---|---|
| SOP \| WI | [document number] | [document name] |

#### 5.1.7.4 Related Tasks

- Section ***4.4 Related Tasks*** contains a list of tasks, as defined according to SOP-004, who assume a responsibility within the SOP.

### 5.1.8 Procedure

- Section ***5 Procedure*** contains a complete stepwise description of tasks for the given procedure using consistent terminology and layout in a clear and understandable way.
- Process should be broken into numbered sections.
- Within each section, each single step may receive unique numbers and/or bullet points.
    - Sub-steps marked with bullet points receive an indentation of 0,63 cm from the left per sub-step, hanging by 0,63 cm.

### 5.1.9 References

- Section ***6 References*** contains a complete list of referenced documents, including upstream SOP, using the IEEE (Institute of Electrical and Electronics Engineers) 2006 reference style.
- If no references are contained write: **There are no references in the current document.**

### 5.1.10 Annexes

- If applicable, section ***7 Annexes*** contains annexes, e.g. templates of lists.
- If no annexes are contained write: **There are no annexes in the current document.**

## 5.2 Further processing

### 5.2.1 Approval

- The draft version of a new release of an approved SOP is processed as described in SOP-016 for data quality assets.

### 5.2.2 Communication

- Each person having a task within an SOP (listed in section 4.4) in the time in which the SOP is valid confirms to have read and understood any given version of a SOP.

### 5.2.3 Revocation

- The validity of an SOP ends on the date indicated in the SOP directory as the revocation date.

- The status information of a revoked SOP is set to ***Expired***.

# 6 References

[1] S. Hollmann, M. Frohme, C. Endrullat, A. Kremer, D. D'Elia, B. Regierer and A. Nechyporenko, “Ten simple rules on how to write a standard operating procedure,” *PLoS Computational Biology,* vol. 16, no. 9, p. e1008095, 2020.

# 7 Annexes

**There are no annexes in the current document.**