Standard Operating Procedure

Number: **002**

Name: **WI instructions**

Title: Instructions for drafting, releasing and revising Work Instructions (WI) by the EU Pollinator Hub

Category: General

Status: Approved

Version: 1.0

Date: 2023-06-30

Author: Michael Rubinigg

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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
n.a.	not available
SOP	Standard Operating Procedure

3 Introduction

Work Instructions (WI) are documented procedures which describe in detail how to perform specific tasks defined in a Standard Operating Procedures (SOP). The purpose of the present SOP is the description of specific rules for drafting, releasing and revising WI to ensure a standardised format, content and workflow. It contains specific instructions on the content to be included in a WI.

4 Validity

4.1 Area

The of validity of this document is limited to drafting, release and revision of WI by the team of the EU Pollinator Hub.

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	Number	Name
SOP	001	SOP instructions
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 Work Instructions.

5.1.1.2 Text

- In the present SOP, text to be included as such in the WI to be drafted is written in ***bold italic***, information intended as placeholder is written between [square brackets].
- Text in the WI shall appear as follows:
    - General: Font type Calibri, font style normal; 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)
    - Programming code and database queries: font type Courier; font size 9 pt
        - Text: Font style normal
        - Placeholders: Font style italic

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: ***WI*** [number of the WI] [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 WI required to configure management and compliance standards:
  - ***Number:*** A consecutively numbered, three-digit identifier including leading 0 of the WI starting at 001 written in **bold letters**.
  - ***Name:*** A clear, concise and unique name of the WI 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.
  - ***Status:*** One of the following status information: ***Draft*** | ***Approved*** | ***Expired***
  - ***Version****:* Version number.
  - ***Date****:* Date of release (coming into force) of the current version.
  - ***Authors****:* Name of the author(s) of the WI.
  - 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

5.1.4.1 Current release

- Section ***1.1 Current Release*** contains the following technical information in the current 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.
  - ***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 and Definitions

- 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 WI. It contains the following statements:
  - Identification of the specific reasons for which the WI has been drafted (Why?).

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 current release applies.

5.1.7.1 Area

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

5.1.7.2 Time

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

5.1.7.3 Related Documents

- Section ***4.3 Related Documents*** contains a tabular summary of the document type, document number and name of all quality assets generated by the EUPH to which the current WI explicitly refers to.

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

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.
- Subsequent steps in the procedure should be broken into numbered sections and receive a concise description in the header.

- Within each section, single steps may be further subdivided using 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 using the IEEE (Institute of Electrical and Electronics Engineers) 2006 reference style.

5.1.10 Annexes

- If applicable, section ***7 Annexes*** contains annexes, *e.g.* templates of lists.

5.2 Further processing

5.2.1 Approval

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

5.2.2 Revocation

- The validity of a WI ends on the date indicated in the WI directory as the revocation date of the WI or its related SOP.
- The status information of a revoked WI is set to ***Expired***.

6 References

There are no sources in the current document.

7 Annexes

There are no annexes in the current document.