Work Instructions

Number: **011**

Name: **Organisation management**

Title: Definition, assignment/retirement of/from skills and roles using the EU Pollinator Hub platform management application

Status: Approved

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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
5 Procedure 7
5.1 Managing the organisation chart 7
6 References 9
7 Annexes 10

1 Document history

1.1 Current Release

1.1.1 Drafted

Submitted on 2024-01-25 by Michael Rubinigg, quality manager.

1.1.2 Reviewed

Reviewed on 2024-01-27 by Noa Simòn Delso, general manager.

1.1.3 Approved

Approved on 2024-01-27 by Michael Rubinigg, quality manager.

1.2 Change history

n.a.

2 Abbreviations

EU	European Union
EUPH	EU Pollinator Hub
n.a.	not available
WI	Work Instruction

3 Introduction

This document contains instructions for the definition, assignment/retirement of/from skills and roles using the EU Pollinator Hub platform management application.

4 Validity

4.1 Area

The of validity of this document is limited to the definition, assignment/retirement of/from skills and roles using the EU Pollinator Hub platform management application.

4.2 Time

The period of validity of this document begins on 2024-01-27 and ends with its revocation.

4.3 Related Documents

Document type	Number	Name
WI	019	Access platform management

5 Procedure

5.1 Managing the organisation chart

5.1.1 Access the EUPH Platform management application

- Access the EUPH Platform as described in WI-019.

5.1.2 Manage people

5.1.2.1 People directory

- Select ***People*** in the ***Organisation*** group.

5.1.2.2 Create or edit new individual

- Select ***New Individual*** to create a new individual.
- Select ***Edit*** to edit an existing individual.

5.1.2.3 Edit personal data

- Associate the individual with an existing EUPH user by selecting a user from the ***Related User*** list (required).
- Enter or edit the surname of the individual in field ***Surname*** (required).
- Enter or edit the name of the individual in field ***Name*** (required).
- Enter or edit any middle name of the individual in field ***Middle Names***.
- Enter or edit the e-mail address of the individual in field ***E-mail*** (required).

5.1.2.4 Integrate the individual into the organisation

- Assign an existing role within the EUPH to the individual by selecting a role from the ***Role*** list of the ***Charts*** container (required).
- Assign an existing task for which the individual will be responsible within the EUPH to the individual by selecting a task from the ***Task*** list of the ***Charts*** container (required).
- Assign the role of an individual to which the individual reports to within the EUPH by selecting a role and the associated individual from the ***Reporting to*** list of the ***Charts*** container.
- Enter the date at which the individual takes over the task within the EUPH in the field ***Start date*** of the ***Charts*** container (required). .
- Enter the date at which the individual retires from the task within the EUPH in the field ***End date*** of the ***Charts*** container.
- To add an additional container for any additional task the individual should be assigned to select ***Add to charts*** and repeat all previous steps in section 5.1.2.4.

5.1.2.5 Save the settings

- Select ***Cancel*** to return to section 5.1.2.1 (list view) without saving the settings.
- Select ***Save & Exit*** to return to save the entered settings and return to section 5.1.2.1 (list view).
- Select ***Create*** or ***Save changes*** to save the entered settings.
- Select ***Create & create another*** or ***Save & create another*** to save the settings and insert a new individual. Repeat all previous steps in section 5.1.2.3.

6 References

There are no sources in the current document.

7 Annexes

There are no annexes in the current document.