Work Instructions

Number:	**020**
Name:	**Roles and tasks**
Title:	Definition of roles and tasks in the organisation using the EU Pollinator Hub platform management application
Status:	Approved
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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 of roles and tasks in the organisation using the EU Pollinator Hub platform management application.

4 Validity

4.1 Area

The of validity of this document is limited to the definition of roles and tasks in the organisation 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 Editing roles and tasks

5.1.1 Access the EUPH Platform management application

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

5.1.2 Define tasks

5.1.2.1 Task directory

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

5.1.2.2 Create new task

- Select ***New task***.

5.1.2.3 Edit task

- Enter the name of the task in field ***Name*** (required).
- Enter a concise description of the tasks in field ***Description***.

5.1.2.4 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.

5.1.3 Define roles

5.1.3.1 Role directory

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

5.1.3.2 Create new role

- Select ***New role***.

5.1.3.3 Edit role

- Enter the name of the role in field ***Name*** (required).
- Enter the abbreviation for the name of the role in field ***Abbreviation***.
- Enter a concise description of the skills the role requires in field ***Skills***.

5.1.3.4 Save the settings

- Select ***Cancel*** to return to section 5.1.3.1 (list view) without saving the settings.
- Select ***Save & Exit*** to return to save the entered settings and return to section 5.1.3.1 (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 5.1.3.3.

6 References

There are no sources in the current document.

7 Annexes

There are no annexes in the current document.