User Guide for Organisations

Introduction to the Guide

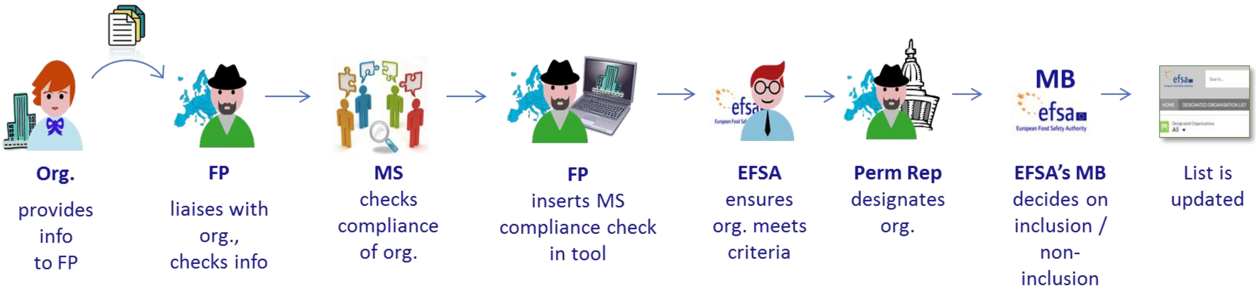
The current User Guide supports the Organisation's Admin Contact person to provide information in the new Competent Organisations Database, used to facilitate the maintenance of the List of Competent Organisations, and initiate the Assessment Request.

As a first instance, it describes how to newly insert organisations in the database. Once the List of Competent Organisations is established in the tool, changes/updates and withdrawal processes will also be described.

The parts of the process that are done outside of the tool are only briefly mentioned, if relevant.

Overall process flows

The **overall procedure** for updating the List of Competent Organisations is:



The initial part of this procedure is done at national level, namely the contact between organisation and Focal Point and checking compliance of organisations with the formal criteria[1].

When the procedure progresses, for organisations that meet the criteria and which the Member States intends to designate, EFSA's Competent Organisations Database is involved. It contains information of the organisations on the List of Competent Organisations and makes this List publicly available.

The tree **main actors** driving the procedure are:

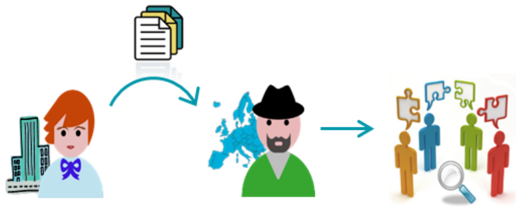
Organisation Admin Contact Person: provides information about the organisation:
a) directly to the Focal Point, via the 'Information Collection Form' and supporting documents, outside of the tool; and
b) in the tool, in the organisation profile ("*account*").

Focal Point: is the main reference point in the **Member State** (MS) to:
- liaise with the Organisation Admin Contact Person;
- facilitate the MS's assessment of organisation's compliance with the criteria and insert the results into the tool; and
- facilitate the designation process via the Permanent Representation/Mission to the EU in Brussels at national level.

EFSA Business Admin: supports actors in the process; facilitates the updating of the List, including decisions of EFSA's Management Board and publishing the official List of Competent Organisations.

[1] Criteria indicated in Article 1 of Commission Regulation 2230/2004.

Activities at national level



The Focal Point liaises with the organisations and other relevant players at national level to collect and store information to assess if organisations meet the criteria for the List of Competent Organisations.

More detailed information is provided in the Guidelines on the Compliance Assessment of Competent Organisations Designated by Member States in Accordance with Article 36 of EFSA's Founding Regulation and its Implementing Rules (*to be provided*).

Getting started in the tool

Introduction to the tool

The tool is based on Salesforce – a cloud technology platform for customer relations management, configured to accommodate the process of establishing and maintaining the List of Competent Organisations.

Please note that parts of the process occur outside of the tool. The tool is just a support to formalise and reach the objective - the establishment and maintenance of the List.

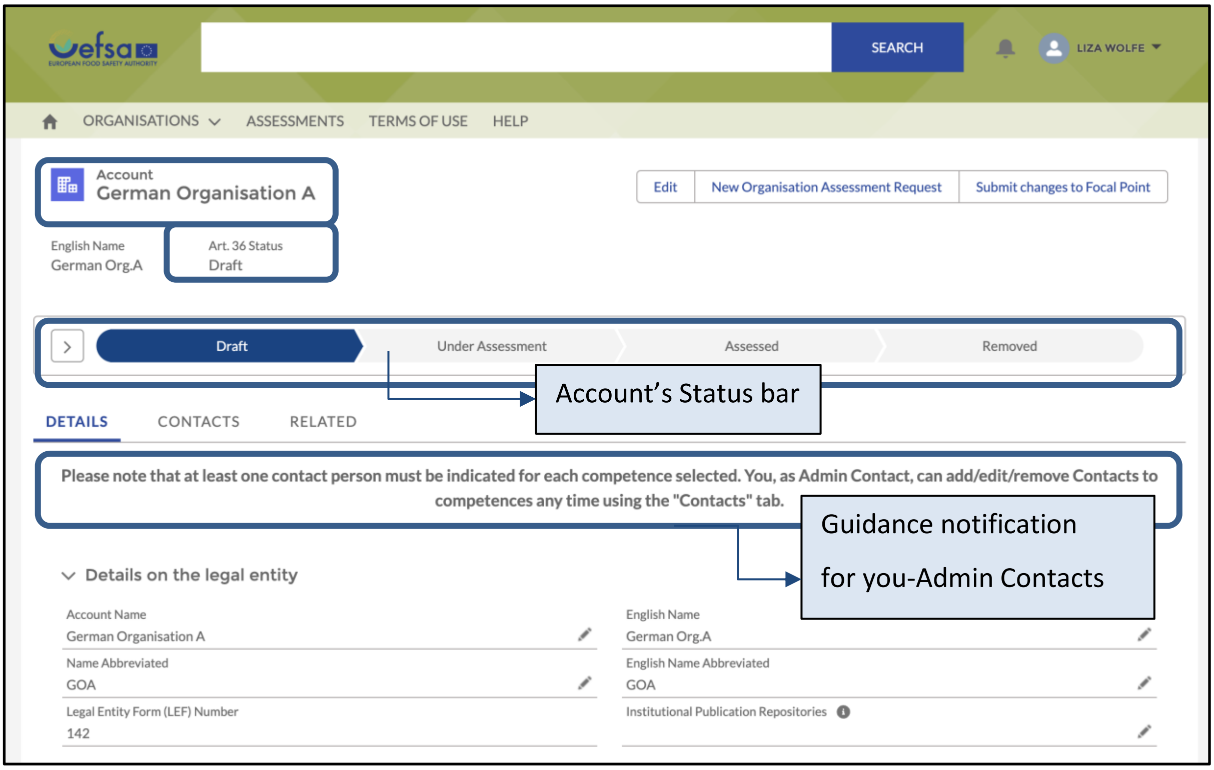
The tool has three main elements, important in establishing and maintaining the List:

1. Accounts
2. Assessment Requests
3. Public List of Competent Organisations

1. Accounts

In the tool, organisation profiles are called "Accounts". They contain information on:

- Organisation's contact details
- Names of parts of the organisation
- Organisation's remit & competences
- Contact persons contact details
- List of related Assessment Requests



An Account has a certain "status", depending on where it is in the process flow.

The statuses shown in the status bar are:

2. Assessment Requests

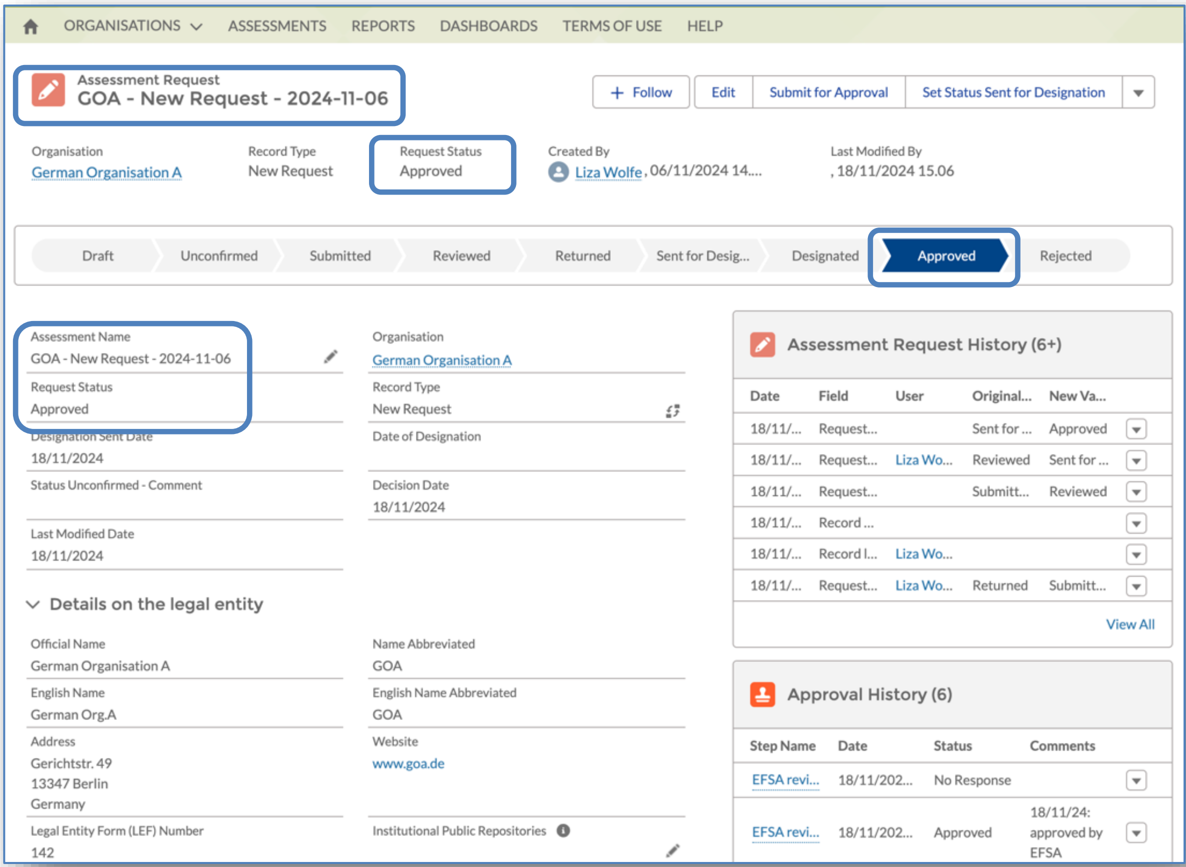
An "**Assessment Request**" starts the processes to update the List:

- To include new organisations (in Process 1. New Organisations)
- To take account of technical updates of organisations on the List (in Process 2. b. Technical Update)
- To take account of substantial changes to organisations on the List (in Process 2. c. Substantial Change)
- To delete organisations from the List for which designation has been withdrawn from a Member State (in Process 3. Withdrawal).

(Note: Process 2.a. Editorial Update does not involve an Assessment Request.)

An Assessment Request contains:

- Organisation's contact details
- Organisation's remit & competences
- Contact persons contact details
- Member State Assessment Summary



An Assessment Request is generated when:

- the Organisation Admin Contact wants to initiate the process of including a new organisation on the List;
- the Focal Point initiates the approval of changes/updates of an organisation on the List; or
- the Focal Point initiates the withdrawal of an organisation from the List.

An Assessment Request has a certain "status", depending on where it is in the process flow. These are described in each process section below.

Relationship Account and Assessment Request

The relationship between an Account and an Assessment Request is described in the box below:

Account statuses

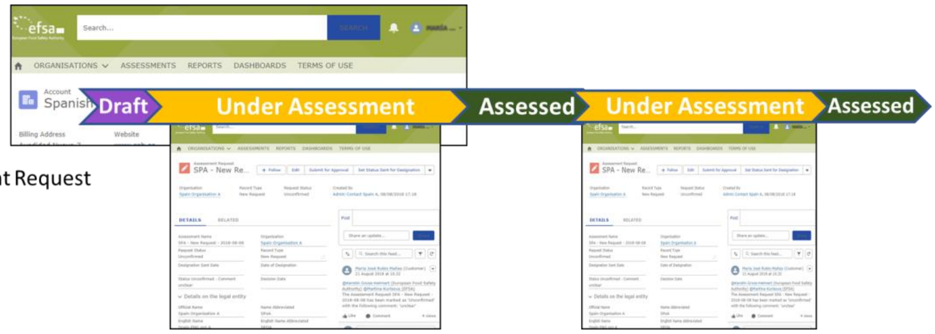
Draft	Under Assessment	Assessed	Removed
When an **Account** is generated, its status is: **DRAFT**.	The process of assessing the organisation is done via an Assessment Request. When an **Assessment Request is generated**, the status of the **Account** is: **UNDER ASSESSMENT**. The Account remains in the status UNDER ASSESSMENT, as long as the Assessment Request is 'open'.	When an **Assessment Request** reaches an **end**, i.e. the status "Approved", "Rejected" or "Unconfirmed", the **Account** status is: **ASSESSED**.	An **Account** is placed in status "**REMOVED**" when the **Assessment Request** to withdraw an organisation from the List reaches the end "**withdrawn**".

At any point in time, **only ONE** Assessment Request can be '**open**' (the Account is in status "Under Assessment").

Over time, an Account will have several Assessment Requests, as the information in the profile is updated. The Account will then have undergone several cycles of statuses "Under Assessment" and "Assessed".

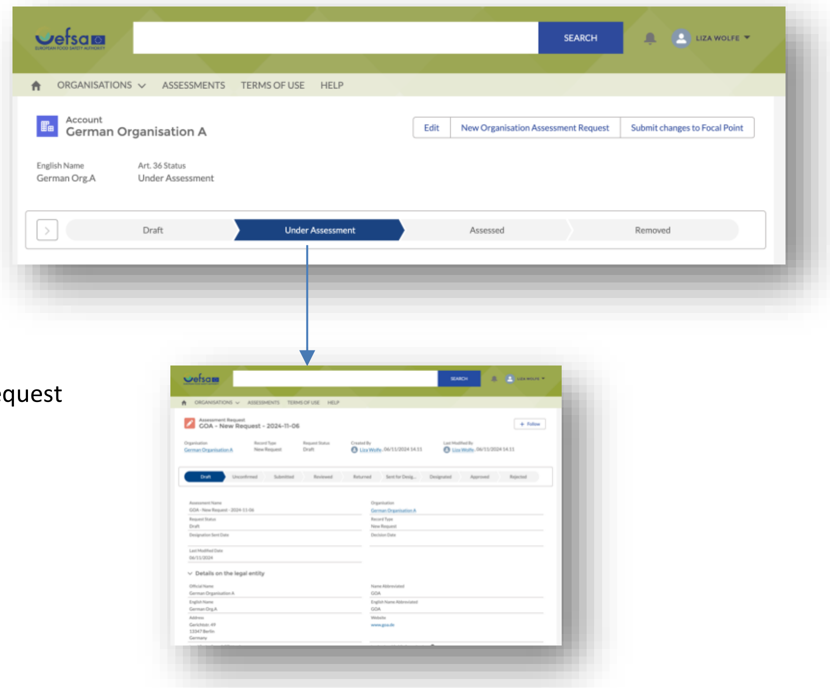
Account

Assessment Request



Account

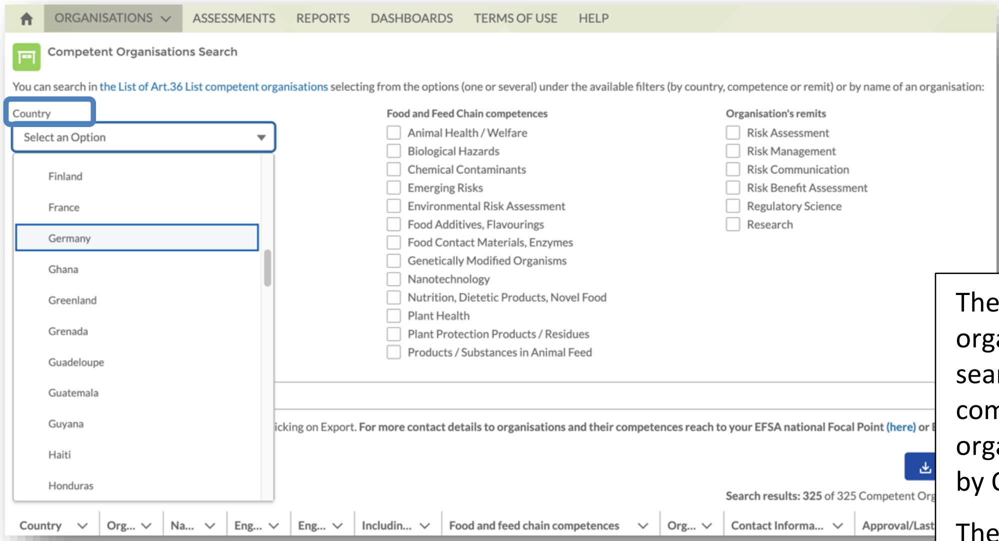
Assessment Request



3. Public List of Competent Organisations

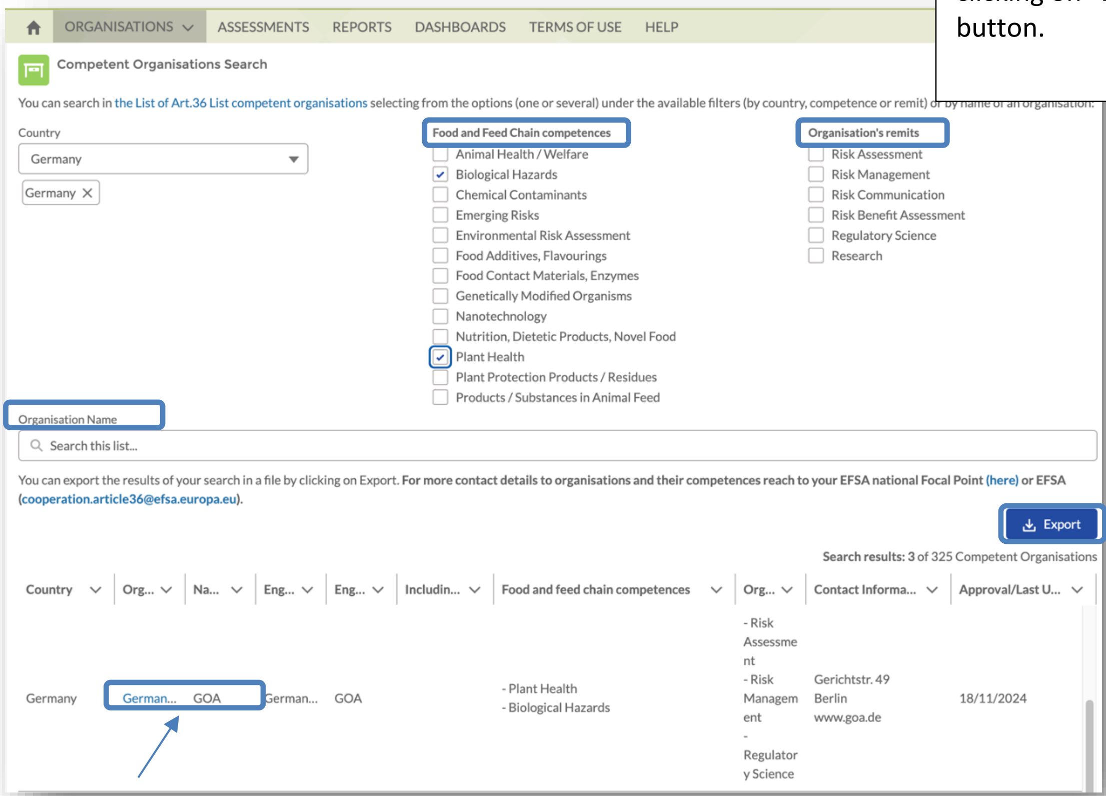
When EFSA's Management Board decides to include an organisation in the List of Competent Organisations and EFSA sets the Assessment Request status to "Approved", the organisation is included in the public list under:

https://efsa.force.com/competentorganisations

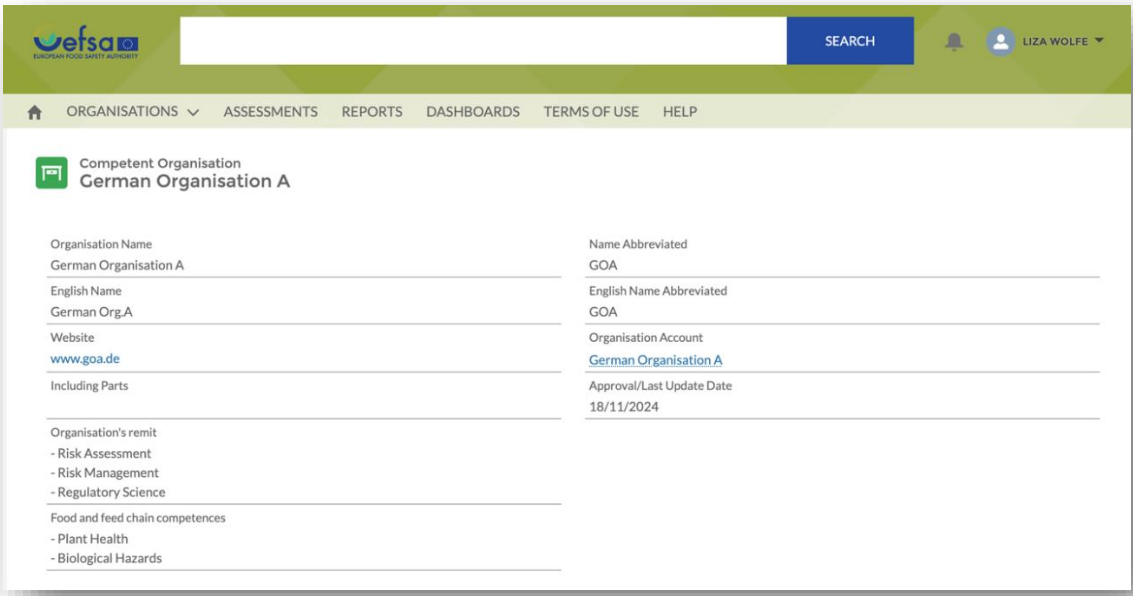


The Competent organization can be searched by Country, competences and organisation's remits or by Organisation Name.

The list of competent organisations can be also exported by clicking on "Export" button.



When clicking on the name of an Organisation, the Organisation details can be viewed:

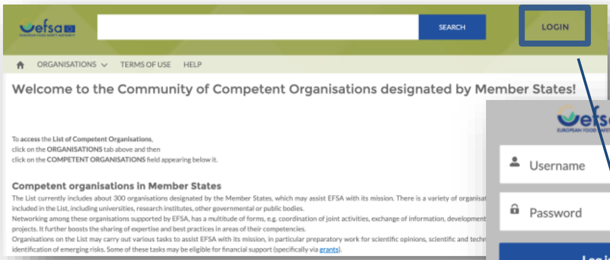


To support networking, the EFSA national Focal Points have the **names** and **contact details** of contact persons **for** the organisation's **competences**. Those contacts are not published at EFSA website and you can have them reaching **to your EFSA national Focal Point** [(contacts here)] **or EFSA** (**cooperation.article36@efsa.europa.eu**), **as indicated in the** Search Tool (and below in this Guide).

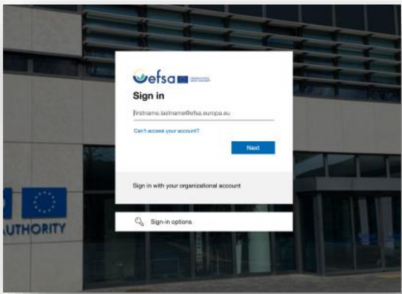
Login into the Competent Organisations Portal

To log in to Salesforce as Portal user:

1. Insert the following URL in your browser: https://efsa.my.site.com/competentorganisations/s/



2. Click LOGIN and use the entry point for "EFSA employee or partner"



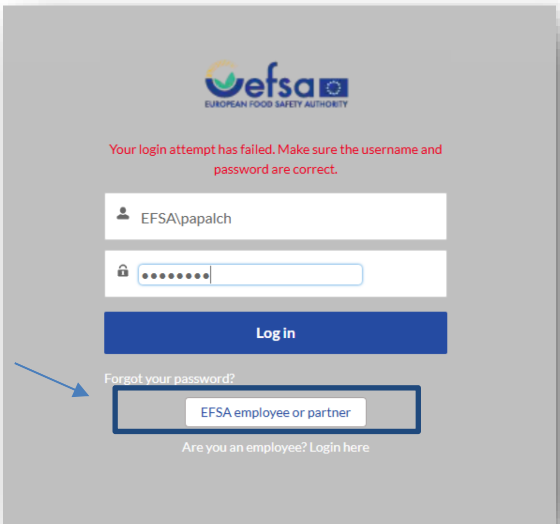
A new window opens:

3. Insert your username (email address).

4. Click on "Next" and follow the instructions.

Please note that the required credentials are the same for all EFSA IT tools.

Oftentimes, Admin Contacts fail to login when not hitting the **correct entry point**.



Please note that when login for the first time, you will be prompted to activate **Multi-Factor Authentication** (MFA) in order to safeguard the data (including personal data) against security threats.

In order to configure the MFA to access to the requested tool please see the instruction on

https://www.microsoft.com/it-it/videoplayer/embed/RE2MuO3?autoplay=false&postJsllMsg=true&autoCaptions=it-it

Then set up your MFA the following Microsoft link is to be used: http://aka.ms/mfasetup.

EFSA recommends to select as the preferred verification option "**Notify me through app**" (it will require the installation of Microsoft Authenticator application).

Important: When following the instruction to configurate your MFA, please be aware that your UPN (User Principal Name) has the following format username@net.efsa.europa.eu (as above indicated), where your 'username' consist of first 5 letters of your surname followed by first 2 letter of your given name (e.g. **Pa**olo **Rossi**ni –> rossipa). When you would need to reset your 'EFSA password', here is the recovery link - https://passwordreset.microsoftonline.com/.

For lost password and/or password reset contact EFSA Service Desk: ServiceDesk@efsa.europa.eu

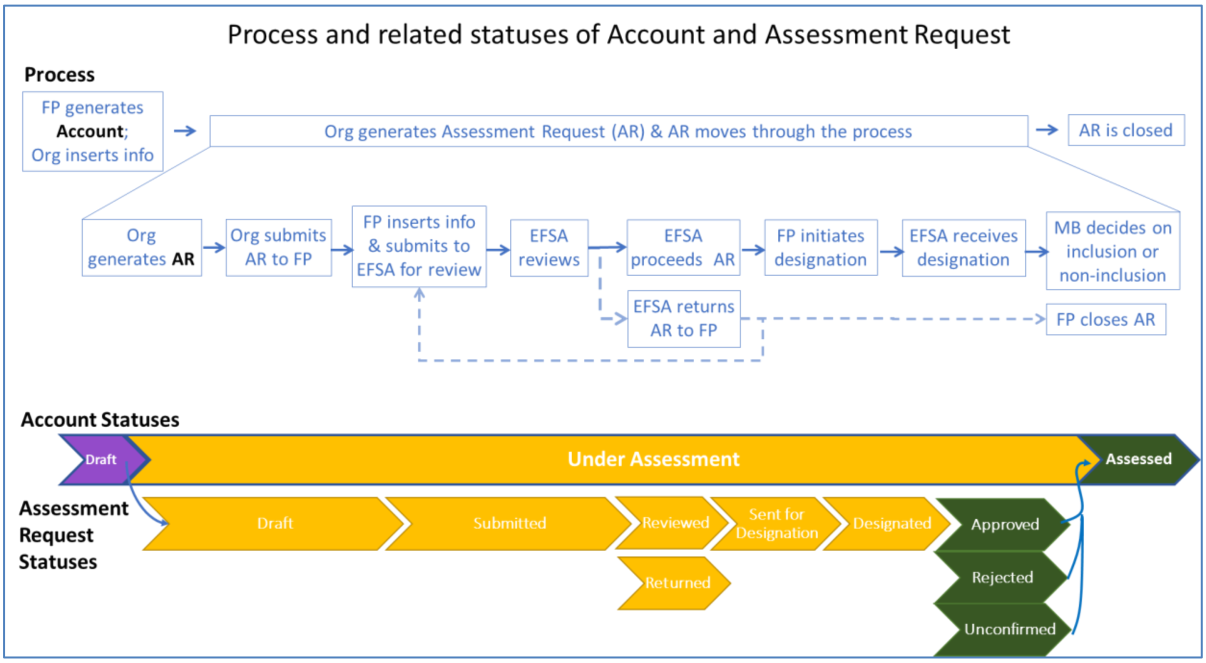
Getting an Organisation on the List

After the Member State has assessed an organisation and concluded that it complies with the criteria, the process for including it on the List of Competent Organisations can be initiated in the CompOrg Database.

Firstly, the Focal Point enables you as the Organisation Admin Contact person and EFSA Service Desk provides your access to your organisation profile/ Account.

The Organisation Admin Contact can then add the needed information in the Account and initiate the process by generating an initial Assessment Request (AR) and submitting it to the Focal Point.

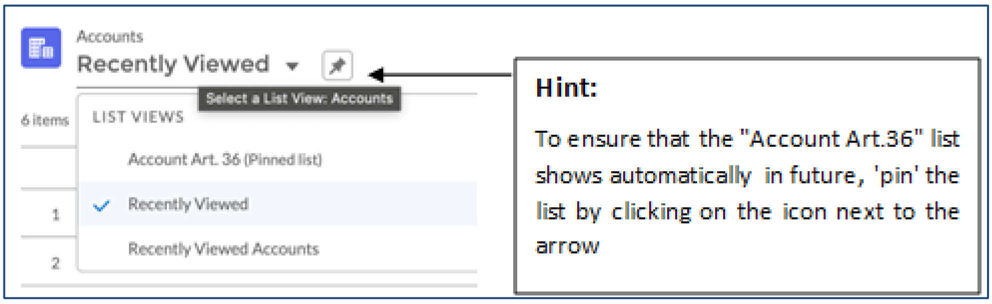
The process flow and Assessment Request statuses are depicted below:

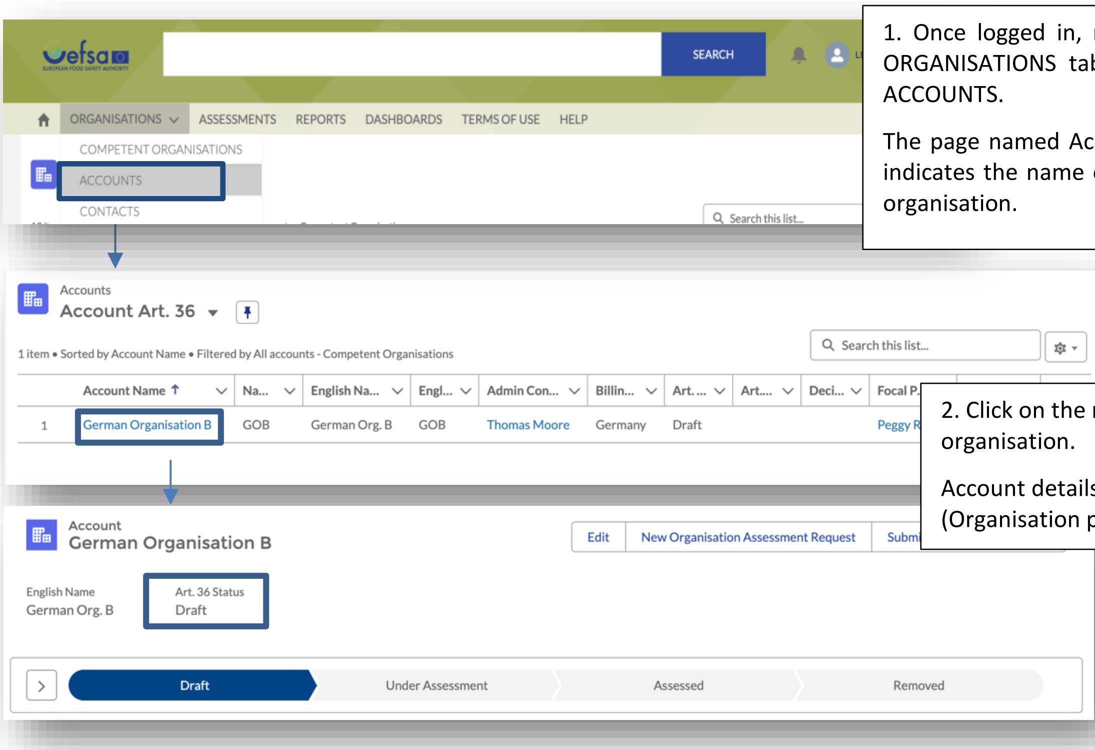


Accessing the Account

The organisation's Account is visible on the Art.36 Accounts page. To open it, click on the organisation's name.

Note: if you cannot see the "Accounts Art.36" list:





1. Once logged in, navigate the ORGANISATIONS tab and go to ACCOUNTS.

The page named Account Art.36 indicates the name of the user's organisation.

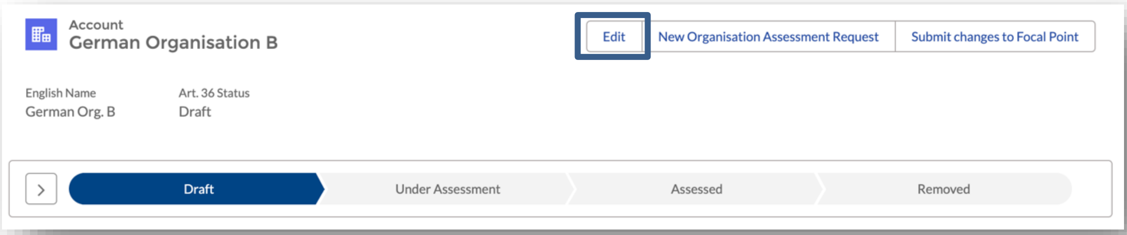
2. Click on the name of the organisation.

Account details page (Organisation profile) appear.

At the beginning, the Art. 36 status of the account is set to: DRAFT

Edit information in the Account

To insert information, the Admin Contact Person clicks on the "Edit" button on the Account page:



This opens a new form, where the missing information can be inserted.
The Edit organisation page is now divided into sections.

Details on the legal entity section include the general information about organization.

It is mandatory to input the following fields:

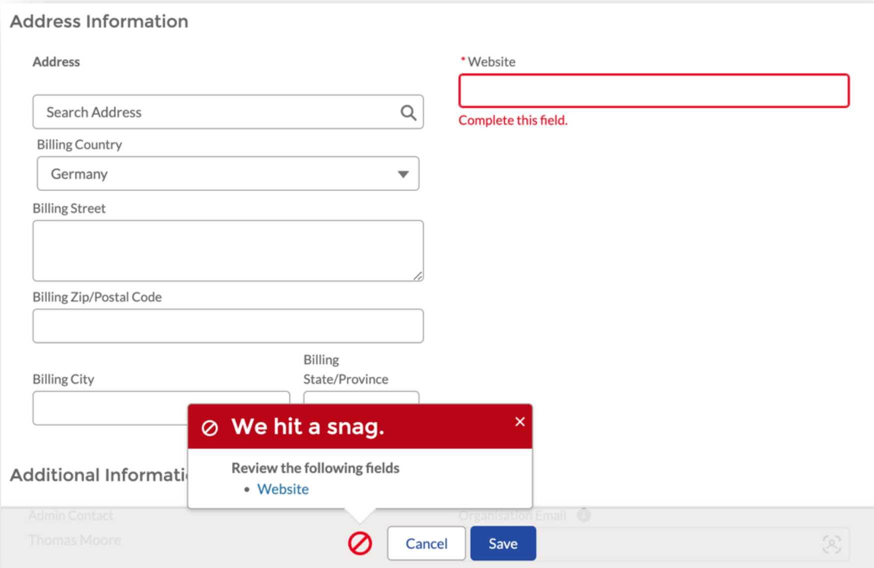
- English name
- Address
- Website
- At least one competence for the Organisation

Information also to be added, as relevant:

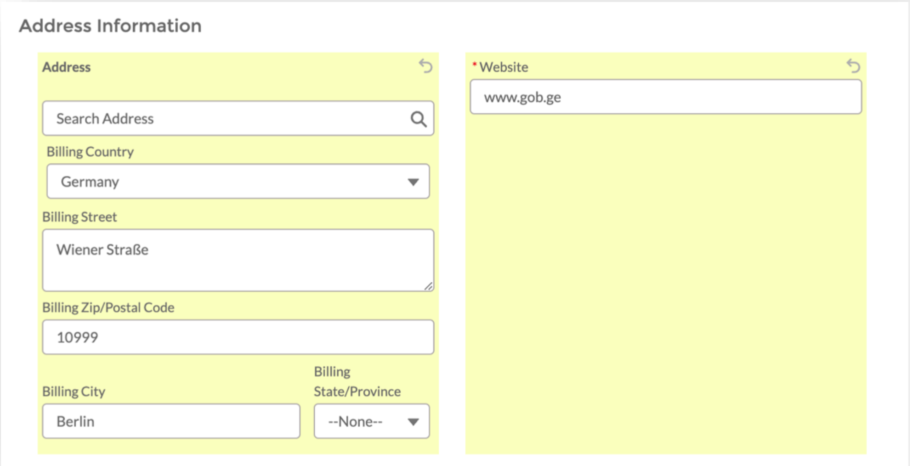
- "Name Abbreviated"
- "English Name Abbreviated"

Address Information section focuses more on address details of the organisation.

Website field is a mandatory one, you can't save the record without providing that information.



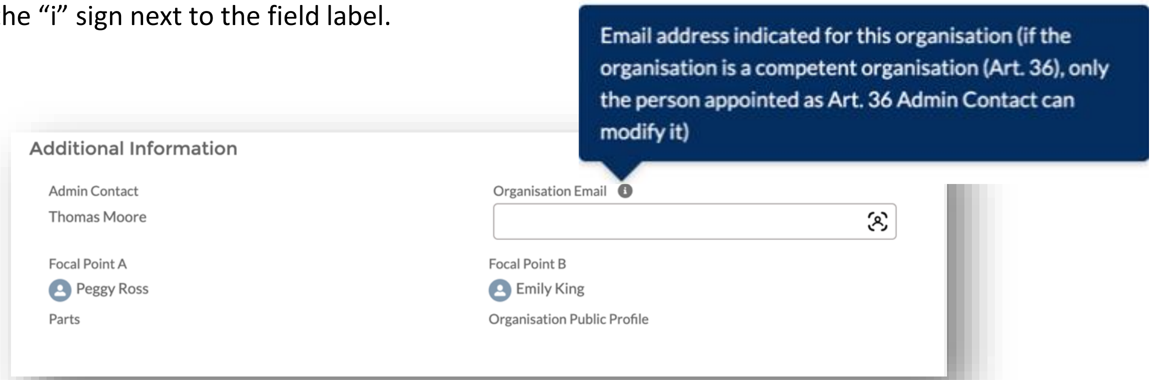
NOTE. Once you provide Address related fields the section, they are colored in yellow.



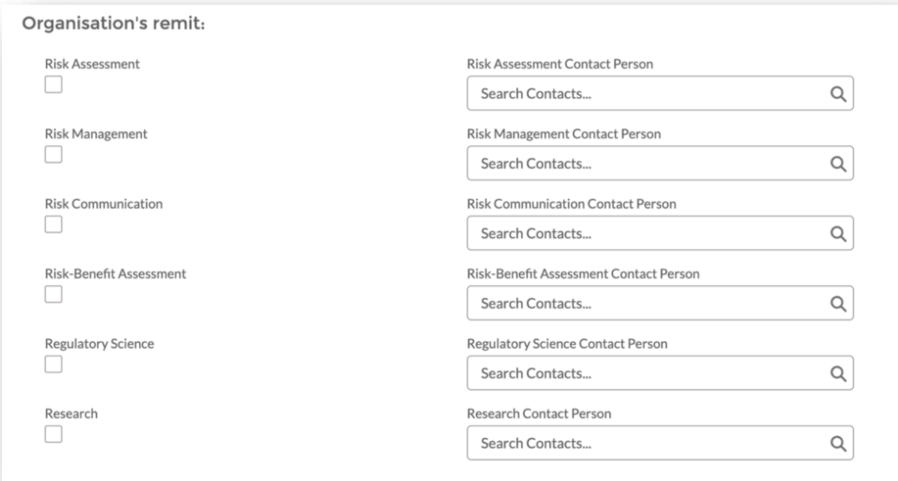
Additional Information section includes certain fields:

- Admin Contact, Focal Point A, Focal Point B, which are populated automatically;
- The fields labelled Parts and Organisation Public Profile are read-only;
- Organisation Email.

Note: Organisation Email field can be modified by Admin Contact person. Help text appears when you hover in the "i" sign next to the field label.



Organisation's remit section focuses on remits of the organisation (if relevant), having 6 areas:.

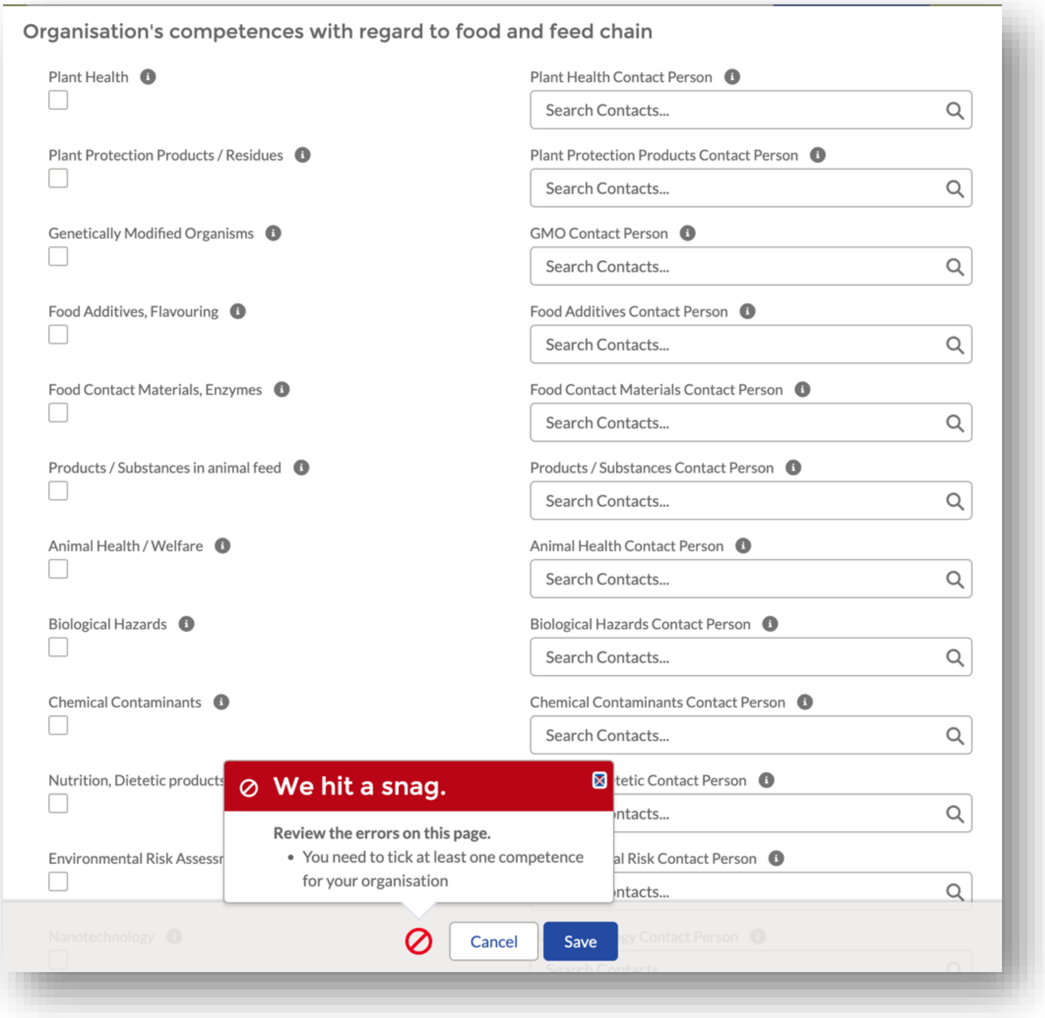


Organisation's competences with regard to food and feed chain has 13 main areas of EFSA work and at least one of these areas needs to be selected. When choosing one, the system allows saving your selection only when you provide (connect) **at least one Contact person** per each competence.

You can add the same Contact person to several Competences, and also yours (then, you woud have two roles: Admin Contact and Contact for Competence(s);

Each selected competence can have several Contact persons and those shall be kept updated by you (i.e. edited/added or removed). You can do it any time, by simple SAVE, and there no approval process.

Note: for adding a **new** competence, you need to start a 'Change request'.



The public List of Competent Organisations will show the following information:

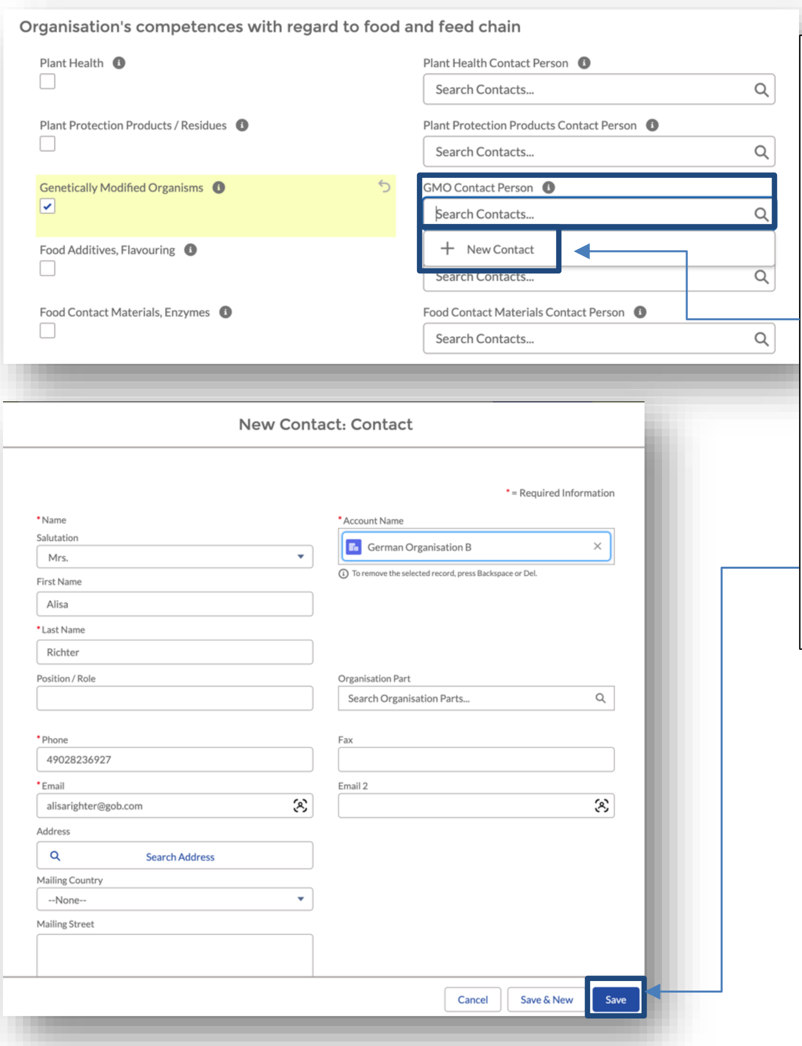
- Organisation name (full & abbreviation) in original language & in English
- Name of organisation parts (reserved for Ministries only)
- Country
- Organisation's remit & competence(s)
- Organisation's address & website
- Organisation's public repositories of publications (if indicated).

Note: Normal formatting should be used, i.e. not all capital letters.

Indicate a contact person for a competence

For each ticked competence of the organisation, at least one contact person needs to be indicated.

At a later point in time, it is envisaged to provide to these persons information related to this area of competence, for themselves and further dissemination within their organisation (or even other networks).
You can update (i.e. edit/add/remove) Contacts to competences anytime.



When the competence is selected, it is mandatory to specify a contact person for that competence.

To create a new contact:

1. Navigate to the Contact Person field next to each competence.

2. Select a person, if already available, or create a new one by clicking on “**+ New Contact”** that prompts opening of a New Contact page opens.

3. Fill in the contact information.

4. Hit **“Save”** button to continue.

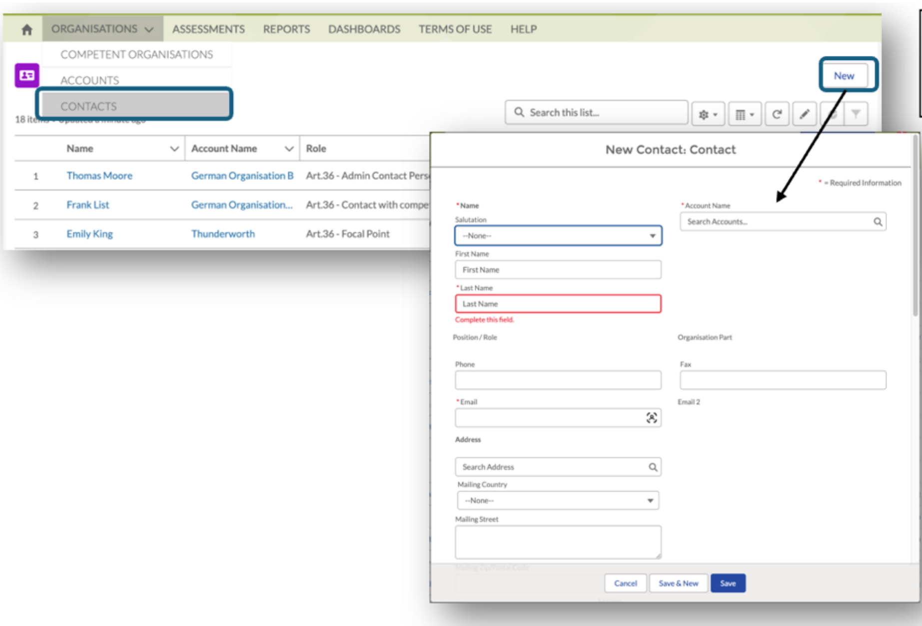
When saved, the contact person page closes, going back to the ‘Account Edit Page’ of the organisation.

Once all necessary information has been added, click on the **“Save”** button of the ‘Account Edit Page’ to save the information of the Account.

Add a new contact person for an organisation

There are two ways of adding new contact persons for an organisation:

1. When adding a competence or remit for an organisation (see the screenshot above), and
2. Direct addition under the Contacts tab, as shown here:



1. Navigate to Organisations tab > Contacts
2. Click on the **"New"** button

A New Contact page opens to create a new contact.

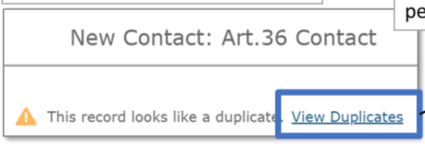
3. Fill in the form. Note that the following fields are mandatory (*):
   - First Name
   - Last Name
   - Email

4. Click on **"Save"**

Avoiding duplicate entries

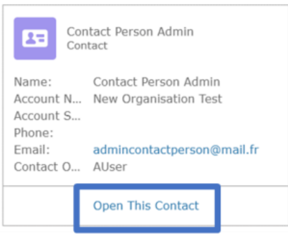
To avoid duplicate entries when filling-in a contact person's details, the tool checks the name and e-mail address. If there is a match with an already existing entry, the tool will provide an alert.

If there **is permission** to view the already existing entry, a link will be provided.



1. Click on "View Duplicates"

A new page will open, showing a summary of the person's information.



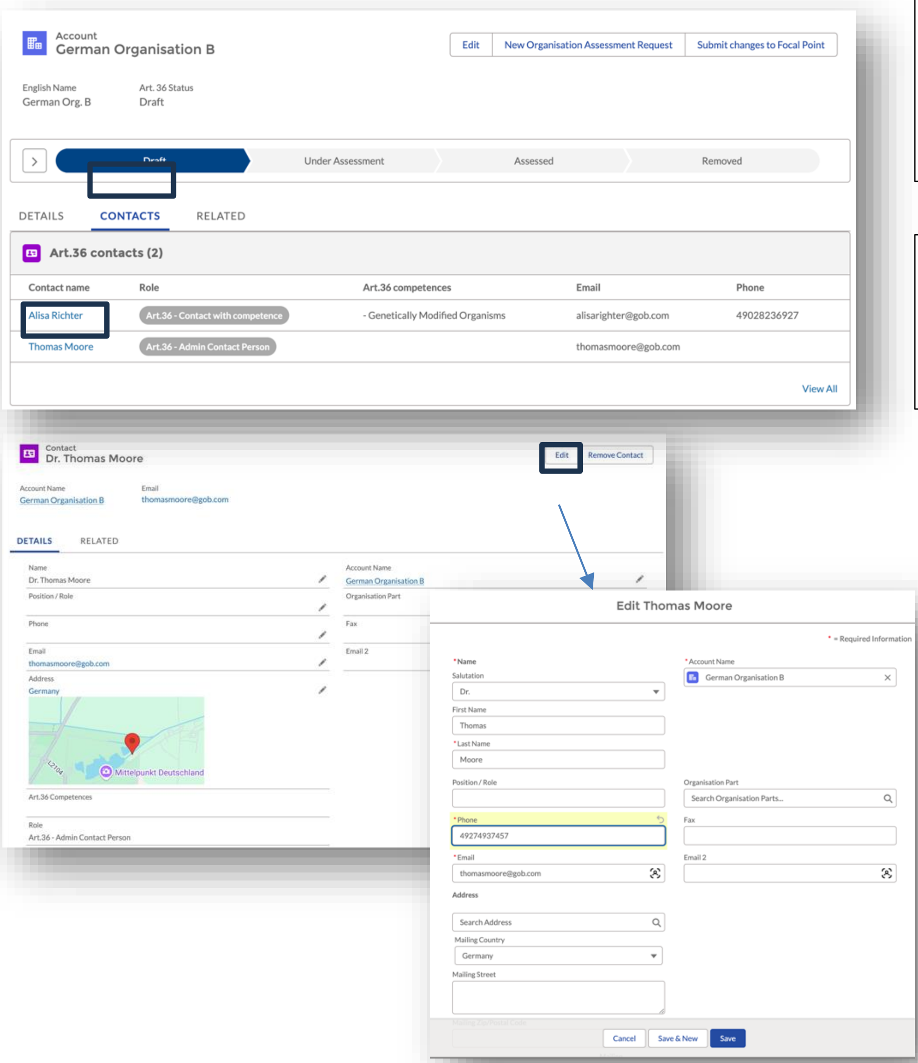
2. Click on "Open this contact" to get more information and see if the existing entry matches the one that should have been generated.

If there is **no permission** to view the already existing entry, it will not be possible to proceed for the indicated name and e-mail address.

1. Ensure that the name and e-mail address are correct.
2. Provide the details of the contact person to EFSA Service Desk (servicedesk@efsa.europa.eu), so that the contact can be linked to the organisation/account.

Modify a contact person’s information

To modify information of the existing contacts, follow the next steps:



1. Navigate to the CONTACTS tab on the Account record page.

2. Click on the contact person’s name.

A page with a contact person’s details opens.

3. Click on the “Edit” button.

A Contact Edit page opens.

4. Modify information or add a remit / competence for the contact, as needed.

Note: Only remits / competences which have already been indicated (ticked) on the Account page can be added.

5. Click on **“Save”**

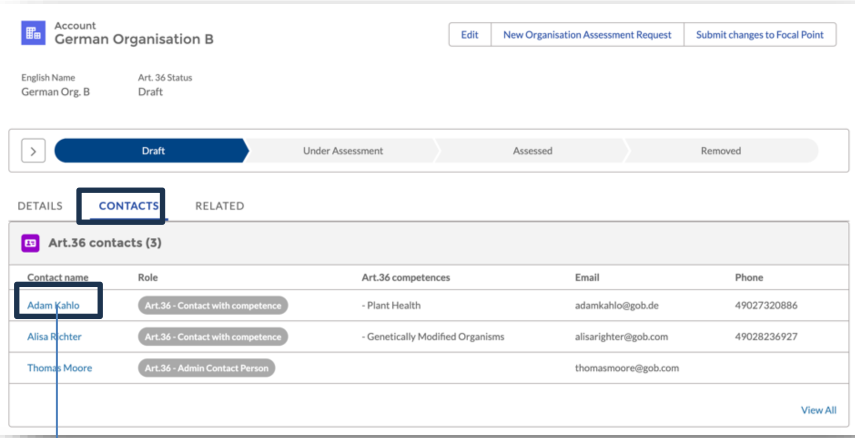
Note: The following fields are mandatory to be filled in for a contact:

- Name
- Account Name
- Phone
- Email

Remove a contact person

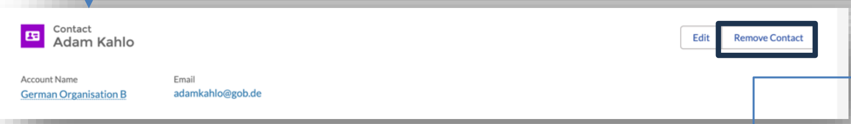
When a contact is to be removed, it is 'unlinked' (i.e. no longer associated) with the account. It remains available in the tool but is no longer visible.

To remove a contact person from an organisation/account:



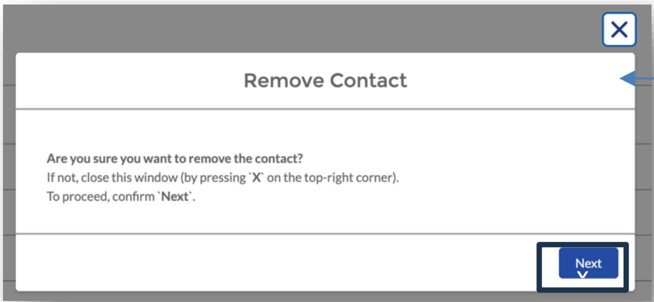
1. Navigate to the CONTACTS tab on the Account record page.

2. Click on the displayed contact person's name.



A page with the person's contact details opens.

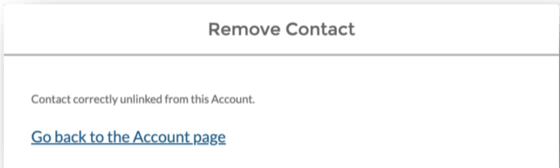
3. Click on the **"Remove Contact"** button (in upper right corner).



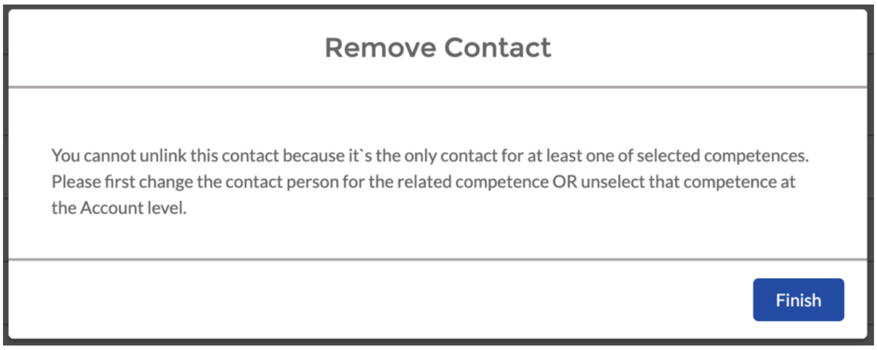
A page opens, asking whether to proceed with removing the contact or not:

4. To keep the contact, click **"X"** (upper right corner). To remove the contact, click on **"Next" button.**

Clicking on **"Next"** a confirmation appears.



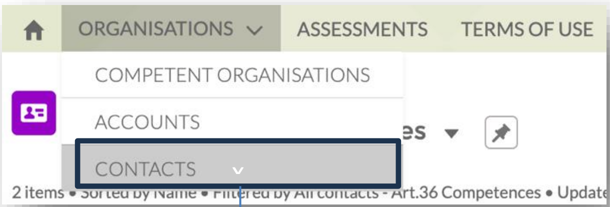
Note: The following message appears when you make an attempt to remove **the only contact** indicated as a Contact person **for certain competence**. To be able to remove that Contact, you would need first to add other Contact to the same competence, so it would remain at least one Contact per competence.



View all contact persons of an organisation

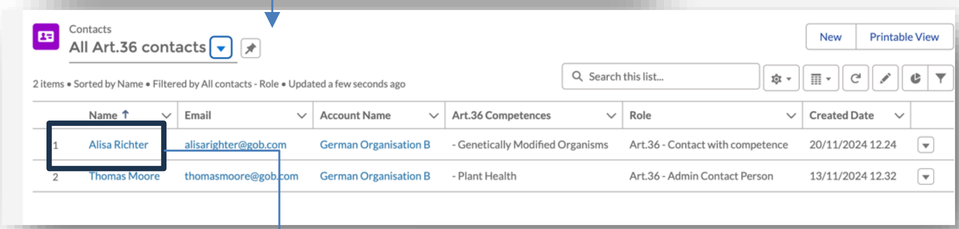
All contacts of an organisations can be viewed, as list, as well as their individual information.

To see the contacts:

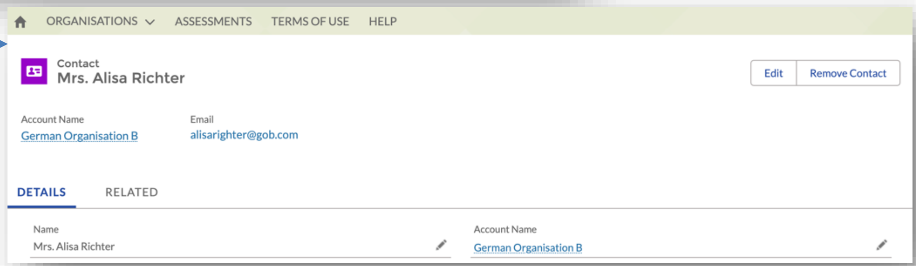


To view the contacts of an Organisation Profile (Account):

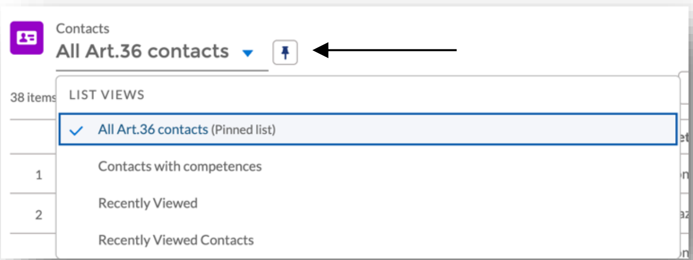
Navigate to the ORGANISATION tab and click on CONTACTS.



To see the Contact details, click on the person's name



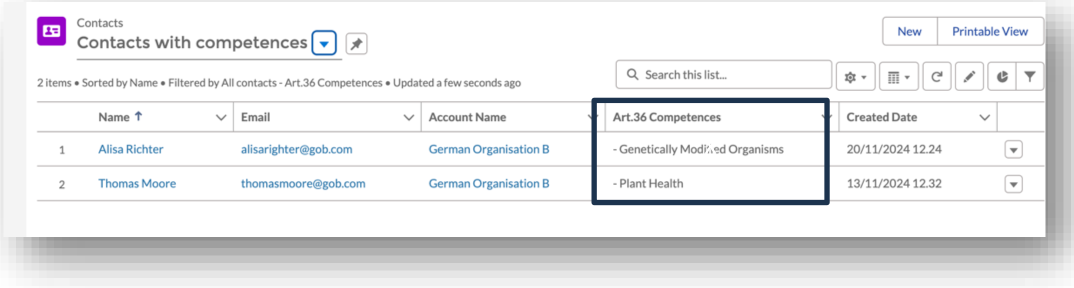
Different list as available, providing different information of the contacts. To review the lists click on the arrow to retrieve and select one.



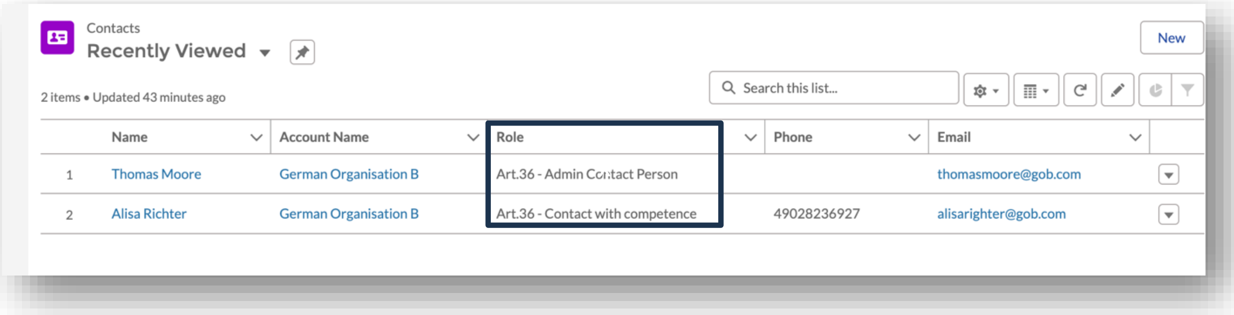
Hint:

The favourite list can be shown easily accessed by pinning the list view. Click on the "pin" button next to the arrow.

Here the "Contacts with competences" list view, including **competences**:



Two list views with similar titles can be found below ‘Contacts with competences’ named **‘Recently Viewed’** and **‘Recently Viewed Contacts’.** These are standard list views provided by the system. 'Recently Viewed' is, sorted by default, by the most recent record, while ‘Recently Viewed Contacts’, is sorted by Name and by record frequency.

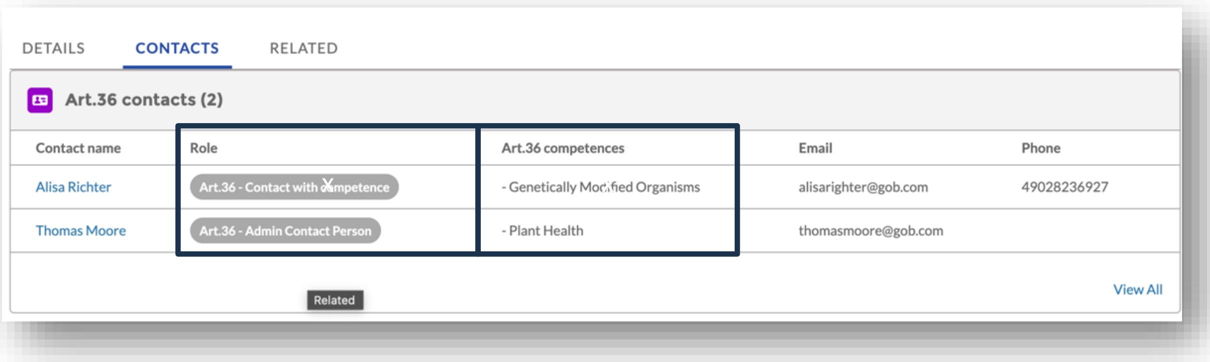


In the ‘Recently Viewed’ list view, the **“Role”** field is included as one of the columns.

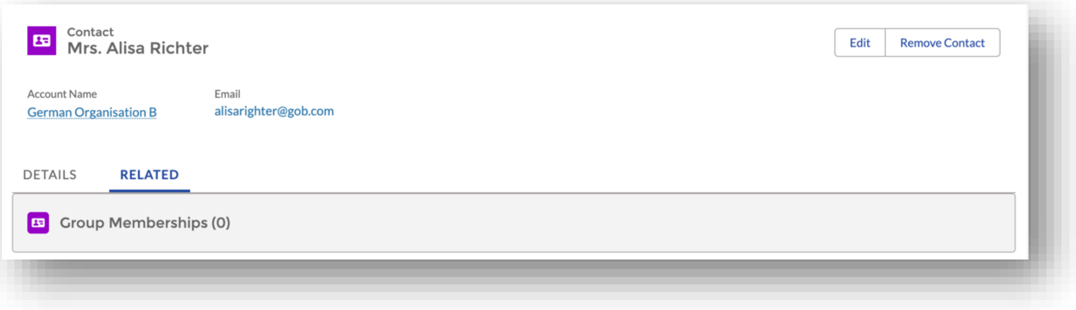
The list of Art. 36 contacts is shown in the Contacts related list on Account level.

Moreover, the newly introduced “Role” field indicates the role associated with that specific contact. It could be either:

- ‘Art. 36 – Admin Contact Person’, or
- ‘Art.36 – Focal Point’, and/or
- ‘Art.36 – Contact with competence’.



A newly introduced change to the contact is the ability to see the groups memberships each contact is involved in. Navigate to the Related tab on Contact record details page and see “Group Memberships” related list.

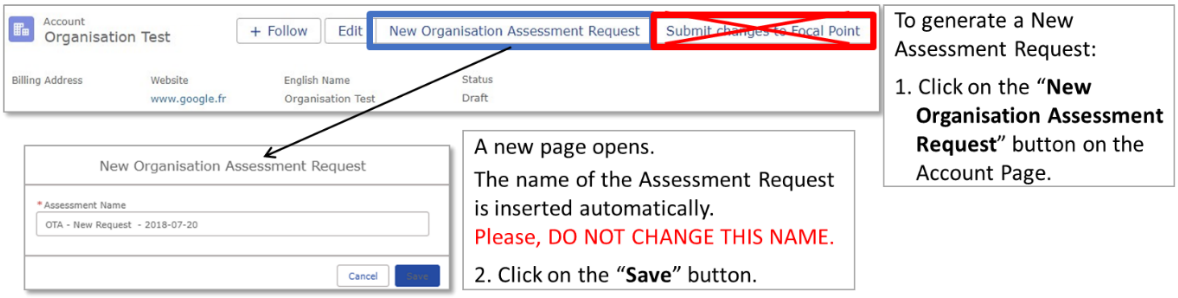


Note: Group Memberships (0) means the contact is not added into any groups.

Generate an Assessment Request

Sending the information in a profile through the process, is done via an Assessment Request. When the Assessment Request is created, the information of the Account is automatically copied on the Assessment Request Page.

It is the Organisation Admin Contact that initiates a New Assessment Request.



As a result:

- The **Assessment Request** is created in the Status: **DRAFT**.
- The **Account** is set to the Status **UNDER ASSESSMENT**.

While an **Account is Under Assessment**, as the Organisation Admin Contact, **you can**:

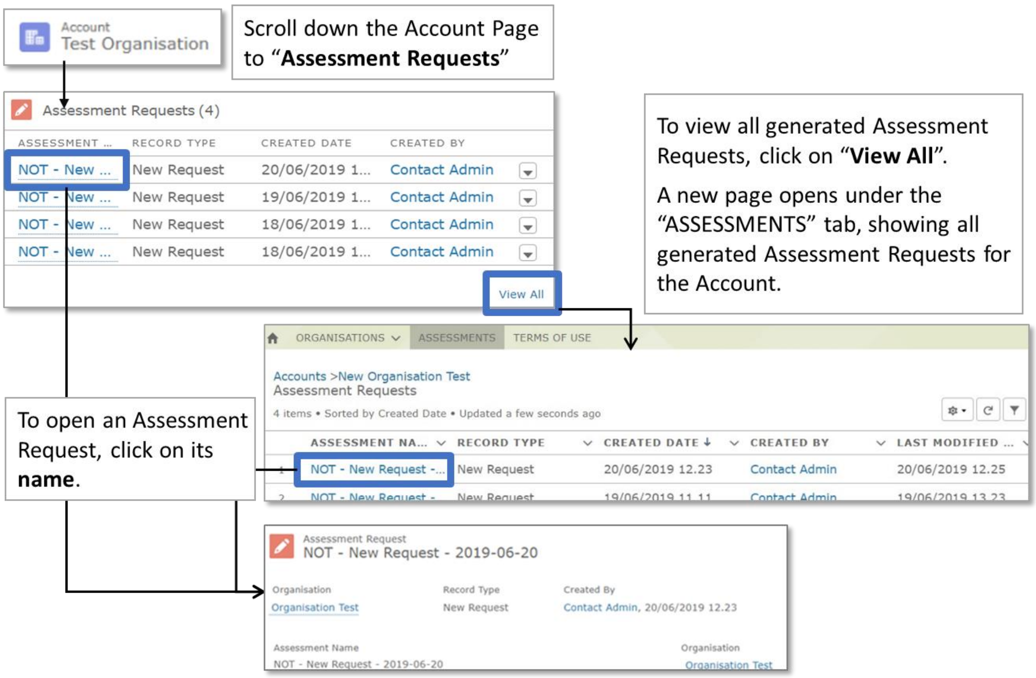
- Add a new contact
- Add a new remit or competence for a contact (for competences already selected for the organisation)

While an **Account is Under Assessment**, in order to ensure the consistency of data while the Assessment takes place, **you cannot**:

- Add new competences to the Organisation
- Modify the Contact person for an existing competence on the Account page

View an Assessment Request

To open and see an Assessment Request:



Assessment Request status "Unconfirmed"

Should any information, for which the Admin Contact is the owner, be missing in the Organisation profile / Account or formatting of the information be needed, the Focal Point will set the status of the Assessment Request to "Unconfirmed".

When an Assessment Request is set to "**Unconfirmed**":

- The **Assessment Request** is '**closed**'; it is no longer possible to proceed with the same request.
- The **Account** status is moved from "Under Assessment" to "**Assessed**", without the organisation appearing on the List of Competent Organisations, as the process for possible inclusion was not finalised.
- It is possible to edit the information in the Account.

Once the Account information has been edited, the Admin Contact needs to generate a new Assessment Request.

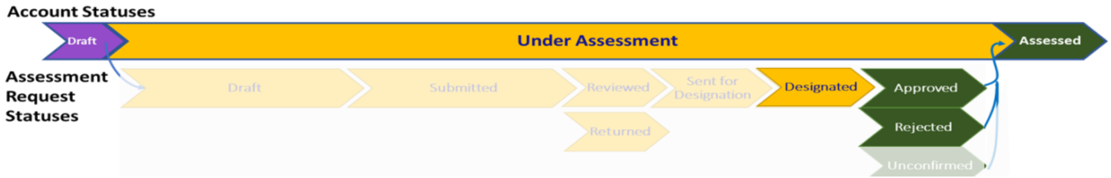
Proceeding the Assessment Request

The Assessment Request will then be moved through the process as described above under "Process: Getting Organisations on the List".

When EFSA's Management Board decides on inclusion or non-inclusion of the organisation on the List of Competent Organisation, the EFSA Admin registers the decision date and outcome, setting the status of the Assessment Request to either "Approved" or "Rejected".

When an organisation is approved, it is included on the published List. Changes to the List are notified in the EU Official Journal (Series C).
When an organisation is rejected, it is NOT included on the published List.

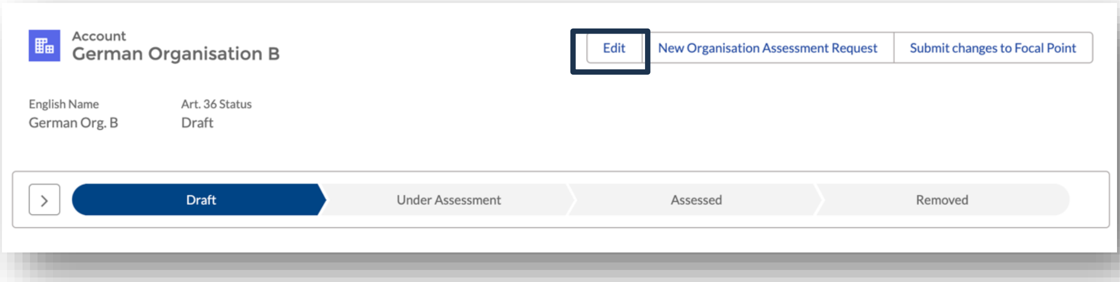
By setting the status "Approved" or "Rejected", the Assessment Request is 'closed'; also the status of the Account is moved to "Assessed".


Account Statuses
Draft
Under Assessment
Assessed
Assessment Request Statuses
Draft
Submitted
Reviewed
Sent for Designation
Designated
Approved
Returned
Rejected
Unconfirmed

Updating the information in the Account

To update information for organisations included on the List of Competent Organisations, the Admin Contact Person accesses the Account and:

1. clicks on the "Edit" button



2. Makes changes
   Note: The changes can be made to Account when it has Status = 'Draft'.
3. Clicks on the **"Save"** button.

Editorial Changes

Editorial changes involve the following information:

- Organisation's address, i.e. Street Name and Number, Postal Code, Town / City
- Organisation's Website / URL
- Personal Contact Detail fields

For information on how to change contact persons and their details, go to:

- Add a new contact person
- Modify a contact person's information
- Remove a contact person

To find out how to view all contact persons of an organisation – see here.

Changes to these fields will be immediately visible on the public List, without the need of approval.

Other Changes

Further to "editorial change", the Admin Contact Person cam also change information in the Account on:

- English name
- "Name Abbreviated"
- "English Name Abbreviated"
- Remit for the Organisation
- Competences for the Organisation
- Repository of organisation's publications

Note:

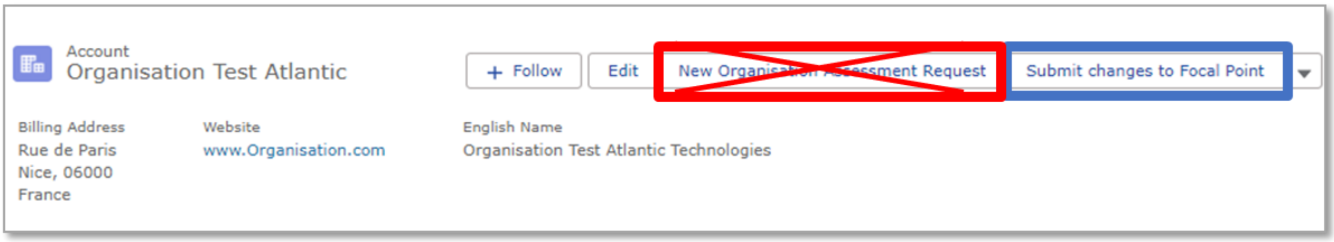
Further changes to the organisations, as well as **documents** supporting these changes, need to be sent to the Focal Point outside of the tool.

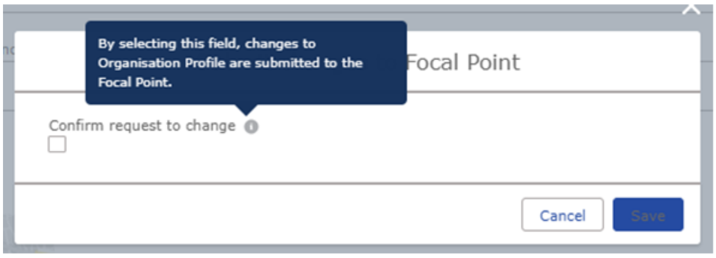
These changes need to go through an approval process. The Admin Contact Person will receive the following **notification**: “*Your changes have been processed. Please submit them to the Focal Point*.”

The Focal Point then checks these changes as well as any other information provided and, if the information is complete, generates a Change Request in the tool. Once this is approved, the changes will be visible on the public List.

Submit the changes to the Focal Point

To submit the changes to the Focal Point:





1. Click on the “**Submit changes to Focal Point**” button

A new page opens:

2. select the “**Confirm request to Change**” checkbox
3. click Save.

The Focal Point is notified.

Whom to contact:

For questions and doubts: **cooperationarticle36@efsa.europa.eu**

Technical issues of the online tool: EFSA Service Desk: servicedesk@efsa.europa.eu

Procedural issues: your **EFSA national Focal Point** (contacts **here**).