

Assign accountable position

Antoinette France - 2022-08-02 - People

How to assign an accountable position to an item in Holocentric Connect

With the introduction of RASCI, users can now assign an accountable position to item types.

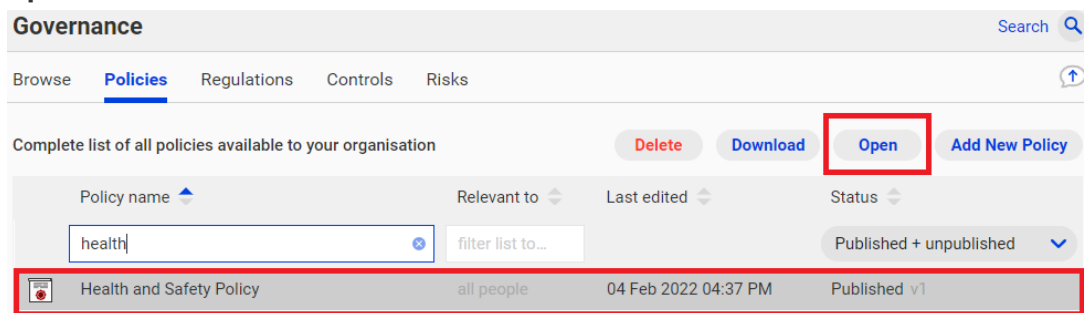
This article includes the following topics:

1. Assigning an accountable position to an item

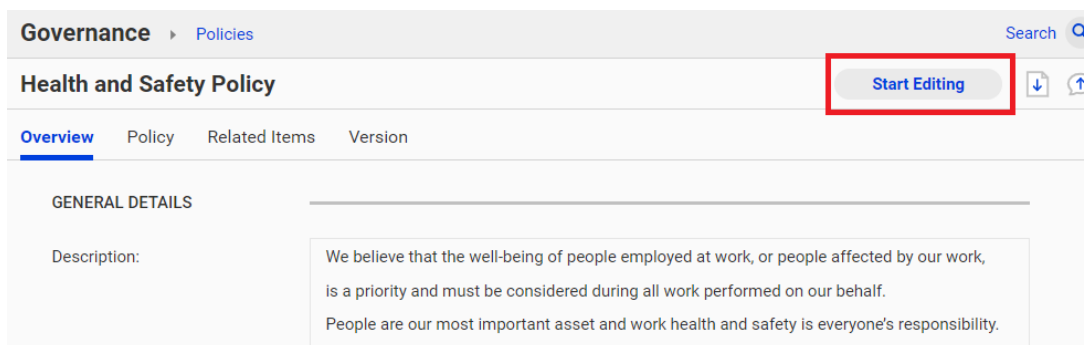
1. Assigning an accountable position to an item

In Holocentric Connect, assigning an 'accountable' position is done at the item level.

1.1 Start by selecting the item you are going to assign the accountability to, and clicking **Open**.



1.2 Click **Start Editing**.



1.3 A release management workflow will appear. Enter comments on what the changes will be and click **Ok**.

Start Editing this Policy



A separate draft version will be created for editing. It is only visible to editors, until published.

Publishing is coordinated in 'Home' / 'Manage Changes', where items can be published in a release together.

Summary of what will be changed:

Adding accountable position

Cancel

OK

1.4 Navigate to the **Version** tab and click **Edit**.

The screenshot shows the 'Health and Safety Policy' version management interface. At the top, it says 'Health and Safety Policy Draft v2' with a dropdown arrow. To the right are buttons for 'Finish All Editing', a download icon, and an up arrow icon. Below this is a navigation bar with tabs: 'Overview', 'Policy', 'Related Items', and 'Version'. The 'Version' tab is selected and highlighted with a red box. Below the tabs, there are two rows of information: 'Status: Draft' and 'Version: 2'. To the right of the 'Status' row is a button labeled 'Edit', which is also highlighted with a red box.

1.5 At the 'Related Positions' field, click **Add**.

The screenshot shows the 'Health and Safety Policy' version management interface. At the top, it says 'Health and Safety Policy Draft v2' with a dropdown arrow. To the right are buttons for 'Finish All Editing', a download icon, and an up arrow icon. Below this is a navigation bar with tabs: 'Overview', 'Policy', 'Related Items', and 'Version'. The 'Version' tab is selected and highlighted with a red box. Below the tabs, there are several rows of information: 'Status: Draft', 'Version: 2', 'Last edited: 29 Jul 2022 12:54 PM, by Antoinette France', 'Created: 29 Jul 2022 12:54 PM, by Antoinette France', 'Approved by: select the user who is approving' with a 'Select' button, 'Approved on: select the date of approval' with a calendar icon, 'Change Summary: Adding accountable position' with a plus icon, and 'Next review: select when this version should next be reviewed' with a calendar icon. At the bottom, there is a 'Related Positions' field with the text 'link to any positions that are stakeholders to this item' and an 'Add' button. The 'Related Positions' field and the 'Add' button are highlighted with a red box.

1.6 Select the position and then use the drop-down menu to set how they are accountable.

Once you've selected, click **Select**.

Select who is responsible for this Policy

Position name

filter position names to text entered here

- CEO
- CFO
- Chief Information Security Officer (CISO)
- HR Manager
- Operations Manager**
- QAC Chair **Draft**
- Treasury Manager

7 items

How are they responsible: **Accountable**

- Accountable
- Approver
- Owner
- Reviewer

Add

1.7 When you have added the position, click **Save**.

Governance > Policies Search

Health and Safety Policy **Draft** v2 Finish All Editing

Overview Policy Related Items **Version**

Status: Draft Cancel

Version: 2 **Save**

Last edited: 29 Jul 2022 12:54 PM, by Antoinette France

Created: 29 Jul 2022 12:54 PM, by Antoinette France

Approved by: select the user who is approving Select

Approved on: select the date of approval Calendar

Change Summary: Adding accountable position +

Next review: select when this version should next be reviewed Calendar

Related Positions: Operations Manager Accountable ×

Add

END