Deactivating a Grand Avenue User Account

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# Introduction

The Grand Avenue system has many different roles and responsibilities that can be assigned to a user. This procedure is intended to identify all roles and responsibilities associated with a user to be deactivated and assist in either removing or reassigning them. This procedure should be performed for all Grand Avenue sites that the user had access to (e.g., Production, Training, Upgrade Testing, Evaluation).

This procedure was last updated specifically for Grand Avenue Release 15.6, and there may be differences in the instructions and types of roles and tasks in other versions of Grand Avenue. Contact support@grandavenue.com if you have questions or need additional assistance with any other versions of Grand Avenue.

# Identify User Roles and Responsibilities

|  |  |
| --- | --- |
|  | 1. Run the User Responsibility Report. This report lists all roles and responsibilities assigned to a specific user.
	1. Log in as a user with the System Administrator or Account Management role.
	2. Click the “Manage Users” link in the left-hand navigation bar.
	3. Click the “Define Users” link
	4. Click the “Info” link next to an active or inactive user.
	5. Click the “View User Responsibility Report” link.
	6. For each item in the User Responsibility Report, complete the corresponding section below
 |

# Deactivate the User’s Account

|  |  |
| --- | --- |
|  | 1. Deactivate the user’s account
	1. Log in as a user with the System Administrator or Account Management role
	2. Click the “Manage Users” link in the left-hand navigation bar
	3. Click the “Define Users” link
	4. Click the “Deactivate” button for the applicable user
	5. Click the “Deactivate” button
	6. Click the “Close” button
 |

# Verify That the Deactivated User’s Email Address is No Longer Used

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| --- | --- |
|  | 1. Verify that the deactivated user’s email address is not associated with any other users
2. Log in as a user with the System Administrator or Account Management role
3. Click the “Manage Users” link in the left-hand navigation bar
4. Click the “Define Users” link
5. On the Define Users page, click the Email Address column to sort the active users by email address
6. Use the browser’s “Find” functionality to search for the user’s email address. Or, scan the sorted Email Address column for other users sharing the email address of the deactivated user. Or, use the “Search” option in the table to search for instances of the user’s email address. If instances are found, change those email addresses to that of an active employee.
 |

# Transfer Module Administrator Assignments

|  |  |
| --- | --- |
|  | 1. Transfer Module Administrator role assignments to other users.
	1. In GAS 15.5 or earlier, log in as a user with the System Administrator role
		1. Click the “Assign Module Administrators” link in the left-hand navigation bar
		2. Assign a new user for each module that lists the user as the module administrator
	2. Click the "Save Assignments” button.
	3. NOTE: Starting in GAS 15.6, module administrator roles are defined under “Manage Role Assignments” and are handled in the next step.
 |

# Transfer General Module Responsibilities

|  |  |
| --- | --- |
|  | 1. Transfer General System role assignments to other users.
2. Log in as a user with the System Administrator role.
3. Click the “Configure System” link in the left-hand navigation bar.
4. In GAS 15.5 or earlier click the “Manage Role Assignments” link. In GAS 15.6 or later click the “Manage System Role Assignments” link.
5. For each role that the user was previously assigned, create role assignments for the replacements (or verify that they already have that role).
6. Click the “Delete” button for the user being deactivated to delete their remaining role assignments.
 |
|  | 1. Transfer Department Manager assignments to other users.
	1. Log in as a user with the System Administrator role
	2. Click the “Manage Departments” link in the left-hand navigation bar
	3. Click the “Define Departments” link
	4. For each department that lists the user as the manager
		1. Click the corresponding “Edit” button for the department
		2. Change the Manager to a different user
		3. Click the “Save” button
 |

# Transfer Audit Module Responsibilities

|  |  |
| --- | --- |
|  | 1. Transfer Audit Module role assignments
	1. Log in as an Audit Module Administrator
	2. Click the “Configure Audit Management” link in the left-hand navigation bar
	3. Click the “Manage Role Assignments” link
	4. For each role that the user was previously assigned, create role assignments for the replacements (or verify that they already have that role).
	5. Click the “Delete” button for the user being deactivated to delete their remaining role assignments.
 |
|  | 1. Transfer active Audit Manager responsibilities
2. Log in as an Audit Module Administrator
3. Click the “Manage Audits” link in the left-hand navigation bar
4. Click the “Define Audits” link
5. For each open audit with the user assigned as the Audit Manager
	* 1. Click the corresponding “Edit” button for the audit
		2. Change the Audit Manager to a different user
		3. Click the “Save” button
 |

# Transfer CAPA Module Responsibilities

|  |  |
| --- | --- |
|  | 1. Transfer CAPA Module role assignments
2. Log in as a CAPA Module Administrator
3. Click the “Configure CAPA” link in the left-hand navigation bar
4. Click the “Manage Role Assignments” link
5. For each role that the user was previously assigned, create role assignments for the replacements (or verify that they already have that role).
6. Click the “Delete” button for the user being deactivated to delete their remaining role assignments.
 |
|  | 1. Transfer CAPA Process Impact Implementation Task Assignee responsibilities
2. Log in as a CAPA Module Administrator
3. Click the “Configure CAPA” link in the left-hand navigation bar
4. Click the “Configure CAPA Process Impacts” link
5. For each process impact with the user listed as the “Implementation Task Assignee”
6. Click the corresponding “Edit” button for the process impact
7. Either assign a different user for the “Default Assignee for the Implementation Task” field, or blank out the field if there is no single appropriate default user
8. Click the “Save” button
 |
|  | 1. Transfer CAPA Review Board default approver responsibilities
2. Log in as the CAPA Module Administrator
3. Click the “Configure CAPA” link in the left-hand navigation bar
4. Click the “Configure CAPA Review Board” link
5. For each role where the user is listed in the “Optional Default Approver” column
6. Click the corresponding “Edit” button for the role
7. Either assign a different user for the “Optional Default Approver” field or blank out the field if there is no single appropriate default user
8. Click the “Save” button
 |

# Transfer Complaint Module Responsibilities

|  |  |
| --- | --- |
|  | 1. Transfer Complaint Module role assignments
2. Log in as a Complaint Module Administrator
3. Click the “Configure Complaint” link in the left-hand navigation bar
4. Click the “Manage Role Assignments” link
5. For each role that the user was previously assigned, create role assignments for the replacements (or verify that they already have that role).
6. Click the “Delete” button for the user being deactivated to delete their remaining role assignments.
 |
|  | 1. Transfer Complaint Regulatory Reporting Reviewer responsibilities
2. Log in as a Complaint Module Administrator
3. Click the “Configure Complaint” link in the left-hand navigation bar
4. Click the “Configure Regulatory Reporting Zones” link
5. For each zone where the user is listed in the “Regulatory Reporting Reviewer” column
	* 1. Click the corresponding “Edit” button for the zone
		2. Either assign a different user for the “Regulatory Reporting Reviewer” field or blank out the field if there is no single appropriate default user
		3. Click the “Save” button
 |
|  | 1. Transfer Complaint Review Board default assignee responsibilities
	1. Log in as a Complaint Module Administrator
	2. Click the “Configure Complaint” link in the left-hand navigation bar
	3. Click the “Configure Complaint Review Boards” link
	4. For each Review Board:
		1. Click the corresponding “Edit” button for the Review Board
			1. For each Reviewer Responsibility row where the user is identified as the Default Assignee click the corresponding “Edit” button
			2. Either select a different user for the “Default Assignee” field or blank out the field if there is no single appropriate default
			3. Click the “Save” button
		2. Click the “Save” button
 |
|  | 1. Transfer Complaint Process Impact Implementation Task Assignee Responsibilities
2. Log in as a Complaint Module Administrator
3. Click the “Configure Complaint” link in the left-hand navigation bar
4. Click the “Configure Complaint Process Impacts” link
5. For each process impact with the user listed as the “Implementation Task Assignee”
6. Click the corresponding “Edit” button for the process impact
7. Either assign a different user for the “Default Assignee for the Impact Implementation Task” field, or blank out the field if there is no single appropriate default
8. Click the “Save” button
 |

# Transfer Design Control Module Responsibilities

|  |  |
| --- | --- |
|  | 1. Transfer Design Control role assignments
2. Log in as a Design Control Module Administrator
3. Click the “Configure Design Control” link in the left-hand navigation bar
4. Click the “Manage Role Assignments” link
5. For each role that the user was previously assigned, create role assignments for the replacements (or verify that they already have that role).
6. Click the “Delete” button for the user being deactivated to delete their remaining role assignments.
 |
|  | 1. Transfer Design Control Review Board default assignee responsibilities
	1. Log in as a Design Control Module Administrator
	2. Click the “Configure Design Control” link in the left-hand navigation bar
	3. Click the “Configure Design Control Review Boards” link
	4. For each Review Board:
		1. Click the corresponding “Edit” button for the Review Board
			1. For each Reviewer Responsibility row where the user is identified as the Default Assignee click the corresponding “Edit” button
			2. Either select a different user for the “Default Assignee” field or blank out the field if there is no single appropriate default
			3. Click the “Save” button
		2. Click the “Save” button
 |
|  | 1. Transfer active Design Control project management/viewing responsibilities
2. Log in as a Design Control Module Administrator
3. Click the “Manage Design Projects” link in the left-hand navigation bar
4. Click the “Edit Design Projects” link
5. For each open project with the user assigned as a Project Manager or Project Viewer
6. Click the corresponding “Edit” button for the project
7. If the user is listed as the Project Manager, select a new user for the role
8. If the user is listed as a Design Project Viewer
	* + 1. Click the “Remove Users” button
			2. Select the corresponding checkbox for the user
			3. Click the “Remove Selected Users” button
9. Click the “Save” button
 |

# Transfer Document Control Module Responsibilities

|  |  |
| --- | --- |
|  | 1. Transfer Document Control Module role assignments
2. Log in as a Document Control Module Administrator
3. Click the “Configure Document Control” link in the left-hand navigation bar
4. Click the “Manage Role Assignments” link
5. For each role that the user was previously assigned, create role assignments for the replacements (or verify that they already have that role).
6. Click the corresponding “Delete” button for the user being deactivated to delete their remaining role assignments.
 |
|  | 1. Transfer Document Control Process Impact Implementation Task Assignee responsibilities
2. Log in as a Document Control Module Administrator
3. Click the “Configure Document Control” link in the left-hand navigation bar
4. Click the “Configure Document Control Process Impacts” link
5. For each process impact with the user listed as the “Implementation Task Assignee”
6. Click the corresponding “Edit” button for the process impact
7. Either assign a different user for the “Default Assignee for the Implementation Task” field, or blank out the field if there is no single appropriate default
8. Click the “Save” button
 |
|  | 1. Transfer Document Control subject matter expert responsibilities
2. Log in as a Document Control Module Administrator
3. Click the “Configure Document Control” link in the left-hand navigation bar
4. Click the “Configure Preliminary Subject Matter Review” link
5. For each subject matter area with the user listed in the “Expert” column:
6. Click the corresponding “Edit” button for the subject matter area
7. Either assign a different user for the “Expert” field or blank out the field if there is no single appropriate expert.
8. Click the “Save” button
 |
|  | 1. Transfer Document Control Default Department Reviewer responsibilities
2. Log in as a Document Control Module Administrator
3. Click the “Configure Document Control” link in the left-hand navigation bar
4. Click the “Configure Default Department Reviewers” link
5. For each department with the user listed in the “Formal Reviewer” column:
6. Click the corresponding “Select” button for the department
7. Either assign a different user for the “Formal Reviewer” field or, if the Department Manager is the appropriate default reviewer, change the field to be blank (indicating that the department manager should be the default reviewer).
8. Click the “Save” button
 |
|  | 1. Remove the user from the Restricted Document Access List
2. Log in as a Document Control Module Administrator
3. Click the “Configure Document Control” link in the left-hand navigation bar
4. Click the “Configure Restricted Document Access” link
5. If the user is listed in the “Users Authorized to View Restricted Document Files” table
6. Click the “Remove Users” button
7. Select the corresponding checkbox for the user being deactivated
8. Click the “Remove Selected Users” button
9. Click the “Save” button
 |
|  | 1. Transfer active Document Collection owner/viewer responsibilities
2. Log in as a Document Control Module Administrator or Coordinator
3. Click the “Define Document Collections” link in the left-hand navigation bar
4. For each active document collection with the user listed as an “Owner” or “Viewer”:
5. Click the corresponding “Edit” button for the document collection
6. If the user is listed as a Document Collection Owner, select a new user for the role
7. (GAS 15.6 and later) If the user is listed as a Document Collection Viewer
8. Click the “Remove Document Collection Viewers” button
9. Select the corresponding checkbox for the user being deactivated
10. Click the “Remove Selected Viewers” button
11. Click the “Save” button
 |

# Transfer Equipment Module Responsibilities

|  |  |
| --- | --- |
|  | 1. Transfer any Equipment Module role assignments
2. Log in as an Equipment Module Administrator
3. Click the “Configure Equipment Management” link in the left-hand navigation bar
4. Click the “Manage Role Assignments” link
5. For each role that the user was previously assigned, create role assignments for the replacements (or verify that they already have that role).
6. Click the “Delete” button for the user being deactivated to delete their remaining role assignments.
 |

# Transfer NCM Module Responsibilities

|  |  |
| --- | --- |
|  | 1. Transfer NCM Module role assignments
2. Log in as an NCM Module Administrator
3. Click the “Configure NCM” link in the left-hand navigation bar
4. Click the “Manage Role Assignments” link
5. For each role that the user was previously assigned, create role assignments for the replacements (or verify that they already have that role).
6. Click the “Delete” button for the user being deactivated to delete their remaining role assignments.
 |
|  | 1. Transfer NCM Process Impact Implementation Task Assignee responsibilities
2. Log in as an NCM Module Administrator
3. Click the “Configure NCM” link in the left-hand navigation bar
4. Click the “Configure NCM Process Impacts” link
5. For each process impact with the user listed as the “Implementation Task Assignee”:
6. Click the corresponding “Edit” button for the process impact
7. Either assign a different user for the “Default Assignee for the Implementation Task” field, or blank out the field if there is no single appropriate default
8. Click the “Save” button
 |
|  | 1. Transfer NCM Review Board responsibilities
2. Log in as an NCM Module Administrator
3. Click the “Configure NCM” link in the left-hand navigation bar
4. Click the “Configure NCM Review Boards” link
5. For each Review Board:
6. Click the corresponding “Edit” button for the review board
7. For each department where the user is listed as an “Optional Default Approver”:
	* + 1. Click the corresponding “Edit” button for the department
			2. Either assign a different user for the “Optional Default Approver” field or blank out the field if there is no single appropriate default.
			3. Click the “Save” button
8. Click the “Save” button
 |

# Transfer Supplier Management Module Responsibilities

|  |  |
| --- | --- |
|  | 1. Transfer Supplier Management Module role assignments
2. Log in as a Supplier Management Module Administrator
3. Click the “Configure Supplier Management” link in the left-hand navigation bar
4. Click the “Manage Role Assignments” link
5. For each role that the user was previously assigned, create role assignments for the replacements (or verify that they already have that role).
6. Click the “Delete” button for the user being deactivated to delete their remaining role assignments.
 |
|  | 1. Transfer Supplier Review Board responsibilities
2. Log in as a Supplier Management Module Administrator
3. Click the “Configure Supplier Management” link in the left-hand navigation bar
4. Click the “Configure Supplier Review Boards” link
5. For each Review Board:
6. Click the corresponding “Edit” button for the review board
7. For each “Reviewer Responsibility” where the user is listed as the “Default Assignee”:
8. Click the corresponding “Edit” button for the “Reviewer Responsibility”
9. Either assign a different user for the “Default Assignee” field or blank out the field if there is no single appropriate default.
10. Click the “Save” button.
 |
|  | 1. Transfer Supplier Process Impact Implementation Task Assignee responsibilities
2. Log in as a Supplier Module Administrator
3. Click the “Configure Supplier Management” link in the left-hand navigation bar
4. Click the “Configure Supplier Process Impacts” link
5. For each process impact with the user listed as the “Implementation Task Assignee”:
6. Click the corresponding “Edit” button for the process impact
7. Either assign a different user for the “Default Assignee for the Implementation Task” field, or blank out the field if there is no single appropriate default
8. Click the “Save” button
 |

# Transfer Training Management Module Responsibilities

|  |  |
| --- | --- |
|  | 1. Transfer Training Module role assignments
2. Log in as a Training Module Administrator
3. Click the “Configure Training” link in the left-hand navigation bar
4. Click the “Manage Role Assignments” link
5. For each role that the user was previously assigned, create role assignments for the replacements (or verify that they already have that role).
6. Click the “Delete” button for the user being deactivated to delete their remaining role assignments.
 |
|  | 1. Transfer Trainer responsibilities
2. Log in as a Training Module Coordinator
3. Click the “Define Trainers” link in the left-hand navigation bar
4. For each item or department where the user is assigned as a trainer, assign a replacement trainer (or verify that another trainer already exists)
5. Click the “Edit” button next to the user’s trainer assignments
6. Click the “Delete Item Trainer Assignments” button for the “Item Trainer Assignments” table
7. Use the header-row checkbox for the “Item Trainer Assignments” table to select all item trainer requirements
8. Click the “Delete Selected Trainer Assignments” button
9. Click the “Delete Department Trainer Assignments” button for the “Department Trainer Assignments” table
10. Use the header-row checkbox for the “Department Trainer Assignments” table to select all department trainer requirements
11. Click the “Delete Selected Trainer Assignments” button
 |
|  | 1. Remove Training/Certification Requirements
2. **NOTE: This step is optional if the Training Module process option “Create new incomplete training records for deactivated users?” is set to “No”.**
3. Log in as a Training Module Coordinator or the manager of the user’s department
4. Click the “Manage Training” link in the left-hand navigation bar
5. Click the “Manage Training” link next to the user’s name
6. Click the “Delete Training Requirements” button for the “Training Requirements” table
7. Use the header-row checkbox for the “Training Requirements” table to select all training requirements
8. Click the “Delete Selected Requirements” button
9. Click the “OK” button in the confirmation dialog
 |

# Remove Module Access List Assignments

|  |  |
| --- | --- |
|  | 1. For each active module in the system
	1. Log in as a Module Administrator for the module
	2. Click the corresponding “Configure <module>” link in the left-hand navigation bar
	3. Click the corresponding “Configure <module> Module Access List”
		1. **NOTE: Unlike other modules, the CAPA module has both a “View Access List” and a “Submit Access List”. Make sure to update both lists.**
	4. If the user is in the list of Users, click the corresponding “Remove” button for the user
 |

# Reassign Remaining Task Assignments to Other Users

|  |  |
| --- | --- |
|  | 1. Reassign open tasks assigned to the user
2. Log in as a System Administrator or the manager of the user’s department
3. Click the “Manage Task Assignments” link in the left-hand navigation bar
4. Click the “View Tasks” link next to the user’s name
5. For each assignment in the “Task Assignments” table:
6. Click the corresponding “Reassign” button for the task
7. Select the new user for the assignment
8. Enter any necessary comments about the reason for the reassignment
9. Enter your password
10. Click the “Reassign” button
 |