Reorganizing Grand Avenue Departments

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# Introduction

Departments are referenced several different ways throughout the Grand Avenue system (e.g. module review boards, document type definitions, owning departments for documents). Depending on where departments are referenced and the type of changes needed, the software has several possible actions available for reorganizing them:

* Users can be moved from one department to another (Manage Users 🡪 Define Users 🡪 Edit).
* Departments that are not referenced by anything else in the Grand Avenue system can be deleted (Manage Departments 🡪 Define Departments 🡪 Delete).
* Departments that have been referenced but are no longer needed cannot be deleted, but instead, must be deactivated (Manage Departments 🡪 Define Departments 🡪 Deactivate).
* Departments that require a **Department Manager** change can be edited (Manage Departments 🡪 Define Departments 🡪 Edit).
* Departments that require a **Department Name** change can be renamed (Manage Departments 🡪 Define Departments 🡪 Rename).

This procedure is intended to identify and update all responsibilities associated with departments to be changed or deactivated.

NOTE: Items below marked as *optional* will not prevent departments from being deactivated, but they should be reviewed for potential changes. The *optional* items can also be revisited after departments are deactivated.

Contact support@grandavenue.com if you have questions or need additional assistance with this procedure.

# Create New Departments

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|  | 1. If new departments will be needed, create those first.
	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. Click the “Add Department” button and enter the new **Department Name** and **Manager**
	5. Click the “Save” button
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# Transfer Audit Module Responsibilities

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|  | 1. N/A
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# Transfer CAPA Module Responsibilities

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|  | 1. *Optional*: CAPA **Approver Roles** are *not* linked directly to departments; however, if **Approver Roles** for the CAPA Review Board are based on department names that will change, update those review board members.
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 review board member that requires department-related updates:
	* 1. Click the “Edit” button next to an **Approver Role**
		2. Update the **Approver Role**
		3. Click the “Save” button for the review board member
6. Click the “Close” button on the Configure CAPA Review Board page
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# Transfer Complaint Module Responsibilities

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|  | 1. This section is applicable only to Grand Avenue versions 14.7 and later

*Optional*: Complaint **Reviewer Responsibilities** are *not* linked directly to departments; however, if **Reviewer Responsibilities** for a Complaint Review Board are based on department names that will change, follow the steps below to update those review board members.*Required*: If a Complaint Review Board has members with a **Default Department** that will change, those review board members *must* be updated.* 1. Log in as the Complaint Handling 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 Complaint Review Board that requires department-related updates:
		1. Click the “Edit” button next to the **Review Board Name**
		2. Click the “Edit” button next to each review board member that has a department-based **Reviewer Responsibility** or where a **Default Department** is specified.
		3. Update the **Reviewer Responsibility** and/or **Default Department**
		4. The **Default Assignee** for all departments should be left blank unless it is someone *other than* the manager of the default department.
		5. Click the “Save” button for the review board member
	5. Click the “Save” button for the review board
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# Transfer Design Control Module Responsibilities

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|  | 1. *Optional*: Design Control **Reviewer Responsibilities** are *not* linked directly to departments; however, if **Reviewer Responsibilities** for a Design Control Review Board are based on department names that will change, follow the steps below to update those review board members.

*Required*: If a Design Control Review Board has members with a **Default Department** that will change, those review board members *must* be updated.* 1. Log in as the 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 Design Control Review Board that requires department-related updates:
		1. Click the “Edit” button next to the **Review Board Name**
		2. Click the “Edit” button next to each review board member that has a department-based **Reviewer Responsibility** or where a **Default Department** is specified.
		3. Update the **Reviewer Responsibility** and/or **Default Department**
		4. The **Default Assignee** for all departments should be left blank unless it is someone *other than* the manager of the default department.
		5. Click the “Save” button for the review board member
	5. Click the “Save” button for the review board
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# Transfer Document Control Module Responsibilities

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|  | 1. *Required*: Update the Document Types configuration to reflect planned department changes
	1. Log in as the Document Control Module Administrator
	2. Click the “Configure Document Control” link in the left-hand navigation bar
	3. Click the “Configure Document Types” link
	4. For each **Document Type** that requires department-related updates:
		1. Click the “Edit” button next to the **Document Type Name**
		2. Select new approving, observing and/or affected departments
		3. Deselect approving, observing and/or affected departments that will be deactivated
		4. Click the “Save” button for the Document Type
	5. Click the “Close” button on the Configure Document Types page
 |
|  | 1. *Optional*: If document revisions are owned by departments that will be deactivated, the **Owning Department** of the effective revisions may be updated administratively. If this step is not performed, deactivation of the **Owning Department** will have no immediate impact on existing documents. Instead, documents’ **Owning Department** will be required to be updated to an active department as they are revised in DCRs.
	1. For more information on administratively updating the Owning Department on documents, refer to the following training presentation: <http://training.grandavenue.com/Administrative%20Changes%20for%20Documents.pptx>
 |
|  | 1. *Optional*: The **Department Reviewer** does *not* have to be cleared before deactivating departments. You may optionally set a **Department Reviewer** for new departments.
2. Log in as the 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 all departments, leave the **Formal Reviewer** blank unless it is someone *other than* the department manager
6. Click the “Save” button on the Configure Department Reviewers page
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# Transfer Equipment Module Responsibilities

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|  | 1. N/A
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# Transfer NCM Module Responsibilities

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|  | 1. *Required*: If an NCM Review Board includes departments that will change, update those review board members.
2. Log in as the 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 NCM Review Board that requires department-related updates:
6. Click the “Edit” button next to the **Review Board Name**
7. Click the “Edit” button next to each **Department Name** that will change
8. Update the **Department Name**
9. The **Optional Default Approver** should be left blank unless it is someone *other than* the department manager
10. Click the “Save” button for the review board member
11. Click the “Save” button for the NCM Review Board
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# Transfer Supplier Management Module Responsibilities

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|  | 1. *Optional*: Supplier **Reviewer Responsibilities** are *not* linked directly to departments; however, if **Reviewer Responsibilities** for a Supplier Review Board are based on department names that will change, follow the steps below to update those review board members.

*Required*: If a Supplier Review Board has members with a **Default Department** that will change, those review board members *must* be updated.1. Log in as the Supplier Management Module Administrator
2. Click the “Configure Supplier Management” link in the left-hand navigation bar
3. Click the “Configure Supplier Review Boards” link
4. For each Supplier Review Board that requires department-related updates:
5. Click the “Edit” button next to the **Review Board Name**
6. Click the “Edit” button next to each review board member that has a department-based **Reviewer Responsibility** or where a **Default Department** is specified.
7. Update the **Reviewer Responsibility** and/or **Default Department**
8. The **Default Assignee** for all departments should be left blank unless it is someone *other than* the manager of the default department.
9. Click the “Save” button for the review board member
10. Click the “Save” button for the supplier review board
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# Transfer Training Management Module Responsibilities

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|  | 1. *Optional*: Update Department Trainer responsibilities to reflect planned department changes. If this step is not performed, new departments will not have department trainers, and department trainers for deactivated departments will be not be used.
	1. Log in as a Training Coordinator
	2. Click the “Define Trainers” link in the left-hand navigation bar
	3. Review the column titled **Assigned Departments** (*not* the **Trainer Department** column)
	4. Click the “Edit” button for any trainer whose assignment needs to be transferred to a different department.
	5. Add/delete Department Trainer Assignments
	6. Click the “Close” button for the trainer
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# Transfer Users

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|  | 1. *Required*: Transfer *active* users from old departments to new departments
2. Log in as a user with the System Administrator role
3. Versions *prior* to Grand Avenue 15.0:
	1. Click the “Define Users” link in the left-hand navigation bar

Versions Grand Avenue 15.0 and later:1. Click the “Manage Users” link in the left-hand navigation bar
2. Click the “Define Users” link
3. Click the “Edit” button on a user to be moved to a new department
4. Enter the user's new department or click the Select button to select it from a list of existing departments.
5. Click the “Save” button
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# Deactivate Old Departments

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|  | 1. Deactivate departments that are no longer needed.
	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 is no longer needed:
		1. Click the “Deactivate” button
		2. Enter the name of the **Proxy Department**
		3. Click the “Deactivate Department” button

(NOTE: The department manager of a **Proxy Department** may *only* **Manage Task Assignments** and **Manage Training** for deactivated users in the corresponding deactivated department. Setting a **Proxy Department** does *not* automatically transfer other responsibilities from the deactivated department to the proxy department.) |