SOP: Creating and Linking Departments in the System

Objective

The objective of this SOP is to guide team members on how to create new departments, link them to collaborators, and connect them to projects in the system effectively.

Key Steps

1. Navigate to the gear icon and select "Departments" from the menu.
2. Click on the plus button to create a new department.
3. Provide a name for the department and fill in the mandatory fields such as name and description.
4. Click on "Create" to add the new department to the system.
5. Go to "Collaborators" and select a collaborator to link to a department.
6. Click on the pencil icon in the department row of the collaborator.
7. Choose one or multiple departments for the collaborator to work in.
8. Select whether the collaborator can work in both departments and set a primary department if needed.
9. Ensure that the collaborator is linked to the correct department(s) to access relevant projects.
10. Check the department settings in the project to ensure collaborators are assigned to the appropriate department.

Cautionary Notes

- Ensure that all mandatory fields are filled in when creating a new department to avoid errors.
- Double-check the department assignments for collaborators to prevent access issues to projects.
- Make sure to update department settings in projects to align with collaborator assignments.

Tips for Efficiency

- Use descriptive names for departments to easily identify their purpose.
- Regularly review and update department assignments to keep them current.
- Communicate any changes in department structures or assignments to the team for clarity and alignment.

Link to Loom

https://loom.com/share/9db1b028bcea4069b98eca0fd06b4618?src=composer