ProductRecallNZ: User Administration Guide

The purpose of this document

The purpose of this document is to provide a step-by-step guide for ProductRecallNZ administrators to manage their organisation's users.

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Document Owner

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Date	Changes made	Name	Version number
17/02/2017	Document Creation	Jennifer Tate	1.00

| 16/02/2017	Updated to new format and changes to wording	Jennifer Tate	2.00
20/04/17	Added section – Account Administrator resetting user passwords	Jennifer Tate	3.00

Introduction

In order to use this helpguide, you must have either of the following roles:

- Account Administrator
- User Administrator

Please note that each organisation has just one Account Administrator who is the key contact for ProductRecallNZ and is able to administer users and make changes to the account. However, an organisation can also have a User Administrator user who can manage users for the organisation.

Accessing ProductRecallNZ User Management

Upon logging in to your ProductRecallNZ account, you will see the option 'Users' on the left hand menu. Click on this to access the 'User List'. If this option is not present on the left hand menu after logging in, you may not have administrative rights. Please contact GS1 if you believe this is a mistake.
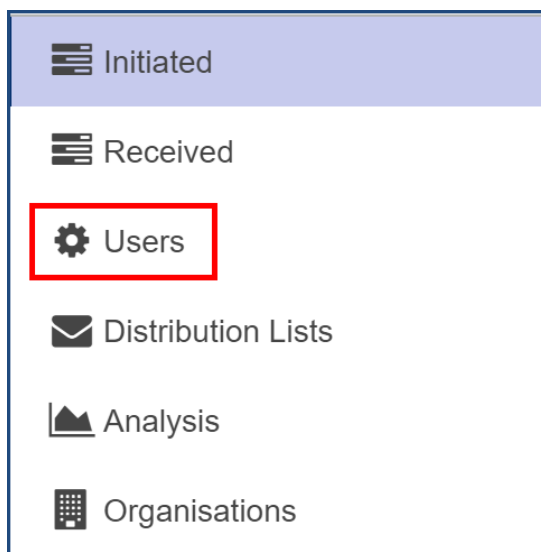
You will be taken to a 'Users List' screen where you can see all the users attached to your organisation.

If you have private locations (only relevant for Retailers) attached to your organisation, you may see a user listed multiple times for each site to which they are attached, for example -

1.0   Adding a New User

To add a new user, on the 'Users List' page, click 'Add User' on the right hand side of the page, above the list of users.
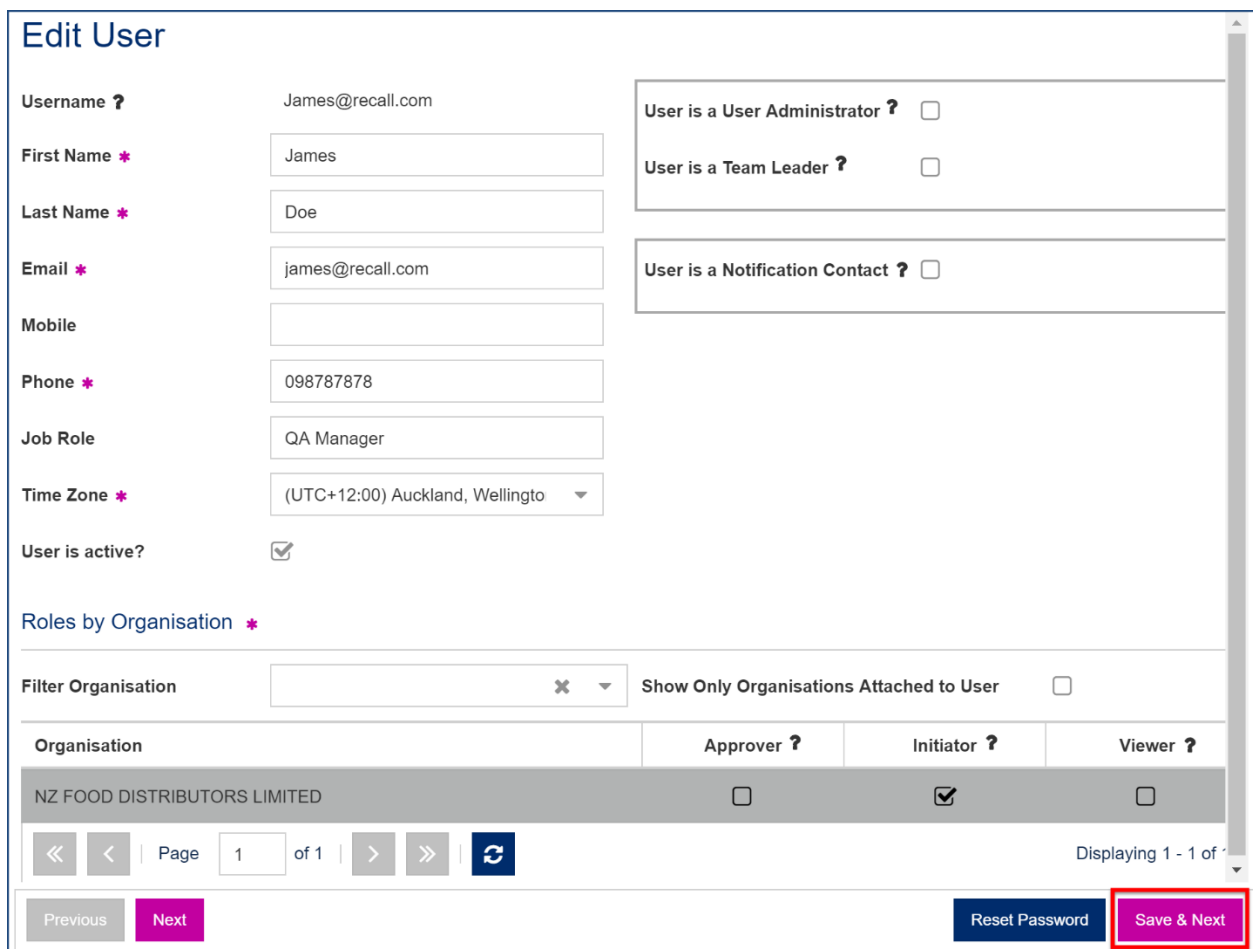
Once on the 'Edit User' screen,

- fill in all mandatory fields (fields with a star next to them)
    - This will include adding a user role (see 'Roles by Organisation') and therefore attaching the user to the selected organisation.
    - If you wish the user to have user administrative rights (be able to add users themselves) you will need to 'tick' the 'user administrator' box.

For help with selecting options for a user, please hover your mouse over the question mark symbols for more information. To understand the available user roles in more depth please read this article.

When all mandatory fields are complete, press 'Save and Next' to be taken to the User Messaging Preferences screen.

On the user messaging screen, certain default messaging will be set up automatically. You will be able to turn on or off specific email/SMS alerts which will be sent to users when notifications are actioned. The options shown here depend on the user roles selected for the user –

User Messaging

This user has no mobile number entered. SMS notifications will not be sent.

Received Notification Messaging

- ☑ EMAIL Notification has been Issued
- ☑ SMS Notification has been issued
- ☐ EMAIL Notification unread after 1 hour
- ☐ SMS Notification unread after 1 hour
- ☐ EMAIL Notification unread and not complete after 12 hours
- ☐ EMAIL Notification acknowledged but not complete after 12 hours

Initiated Notification Messaging

- ☑ EMAIL Notification Submitted for Approval
- ☑ EMAIL Reminder - Notification Go-Live Required
- ☑ EMAIL Notification Approved
- ☑ EMAIL Notification Rejected
- ☑ EMAIL Reminder - Notification Approval required
- ☐ SMS Reminder - Notification Approval Required
- ☑ EMAIL Notification Go Live
- ☑ EMAIL Notification Closed
- ☐ EMAIL Notification Cancelled

For help with user messaging options please see our article on User Messaging Preferences

Once you have selected 'save and back' the user added will receive an email letting them know they have been added as a user and have to log in for the first time.
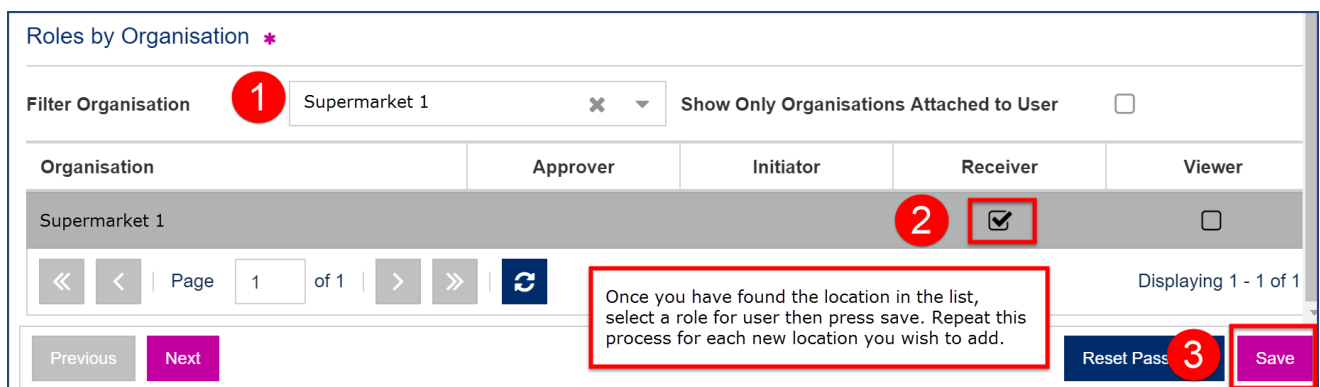
2.0   Adding a User to Multiple Locations

Please note: this section is most relevant for organisations with private receivers attached, such as Foodstuffs North and South Island, Freshchoice/Supervalue or Z Energy.

For an Initiator that wishes to be attached to more than one Initiator organisation, please contact GS1 Support on 0800 10 23 56.

Please note: Private Receivers are special 'receiver' sites that can only be targeted by their head/support office.

Please follow Section 1 to add a user. Once the user has been saved, double-click on the user to enter the editing screen.

Does the user simply need to have visibility of what each location is reporting, but does not need to report or maintain users?

In this case, you will simply add the user to the locations without selecting them as a User Administrator or Team Leader.

User Administrator Role Required?

If a user needs to administrate users at all the organisation they are attached to, as well as accessing the progress reports and reporting back on behalf of locations

If yes, please select the 'User is a User Administrator' option and then add the user to the new location(s).

The 'Team Leader' role is only used by a select number of organisations and is unlikely to be relevant for your organisation.

3.0   Adding a User as a Recall/Withdrawal Notification Contact Only

A notification contact is a static contact who will not action a notification but will appear on notifications that are sent out by your organisation eg: Central Coordinator who receivers can contact as the 'lead' on the notification.
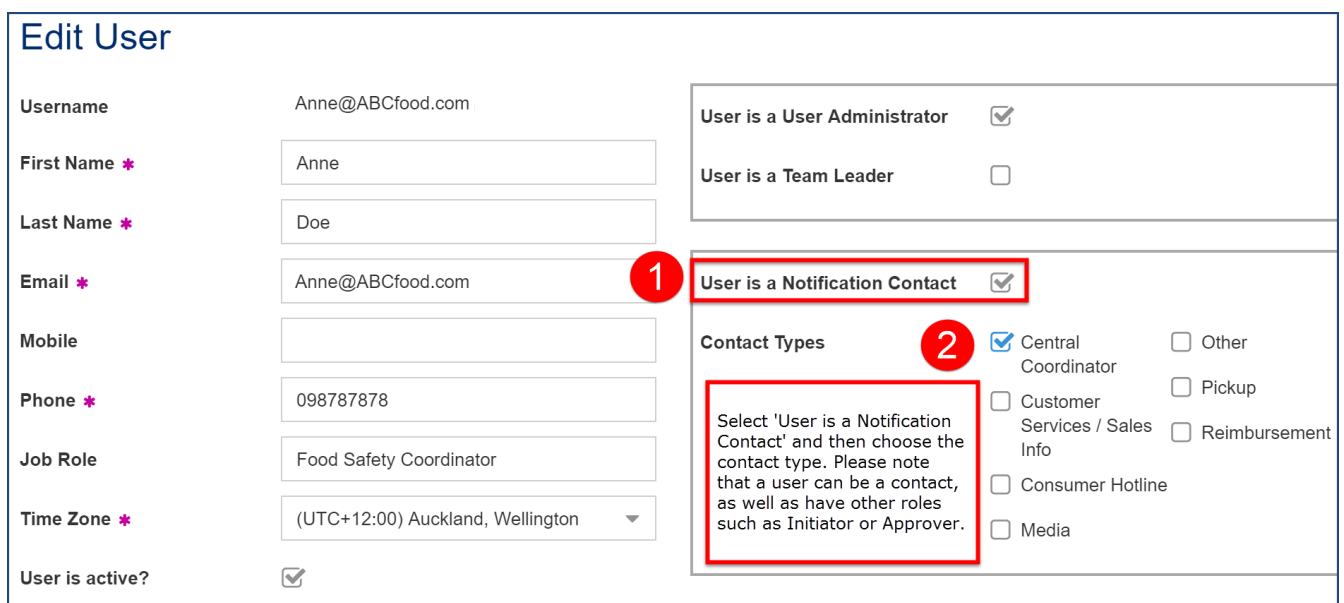
If no contact has been specifically added to the organisation, then the user who creates a notification will become the main contact. With newly onboarding organisations (since December 2016), the Account Administrator is automatically assigned the role of Recall/Withdrawal Coordinator for ProductRecallNZ.

If a new contact needs to be added to replace this, or additional contacts need to be added to manage different aspects of the recall or withdrawal, they will need to be added as a 'Contact' user.

Adding or Removing an Existing User as a Contact

On the left hand menu, go to 'Users' then search the user on the 'User List'. Double-click on them to edit then tick the 'User is a Notification Contact' checkbox and then select a contact type. Once this is done, press 'save' to save your changes.

To remove them as a contact, simply untick the 'User is a Notification Contact' checkbox and 'save'.

Adding a New User as a Contact

- Follow the section above for adding a new user
- Follow Section 3 for adding a contact.

Adding a New User as a Contact Only

Even if a new user is intended as a contact only, they will still need to be attached to a location and have a user account. This way, they can view any notifications that they have a role in.

To do this, add them as a user with a notification contact role and then add them to the organisation as a 'Viewer' role only.

When you click 'Save and Next', you will be taken to the User Messaging preferences screen. You may wish to review the messaging preferences, depending on if the user wishes to be notified of changes to the account.

4.0 Editing an Existing User

To edit an existing user, double-click on the relevant user in the list to open the 'Edit User' screen.

You will be taken to a screen with user preferences. Importantly, this is the screen where you can make a user active or inactive, make them a notification contact (able to be selected as a contact during a notification) as well as edit their roles within each organisation.

you can click 'next' to be taken to the 'User Messaging' screen. Here, you can change the user's text and email message preferences.

Once you have made all required changes, click 'Save and Exit' to be returned to the 'User List'.

5.0   Changing the Account Administrator

To change the Account Administrator for your organisation, you must be the current Account Administrator. If you are not, you will need to contact GS1 to do this on the organisation's behalf. Please see this article for more information.

6.0   Deactivating or Suspending an Active User

Double-click on the relevant user in the list and find the field that says 'User is Active?' then uncheck the box.

A dialog box will pop up letting you know that this user will no longer be able to access ProductRecallNZ. Click 'Yes'.

After this, please press the 'save' button on the bottom right of the screen.

The user has now been deactivated and will no longer be able to login.

7.0   Resetting a Password on behalf of another user

Although every user can reset their own password on the Login Screen (www.productrecallnz.org) by clicking the 'Forgot your Password?' link, it may be preferable for the account administrator to reset a user's password on their behalf.
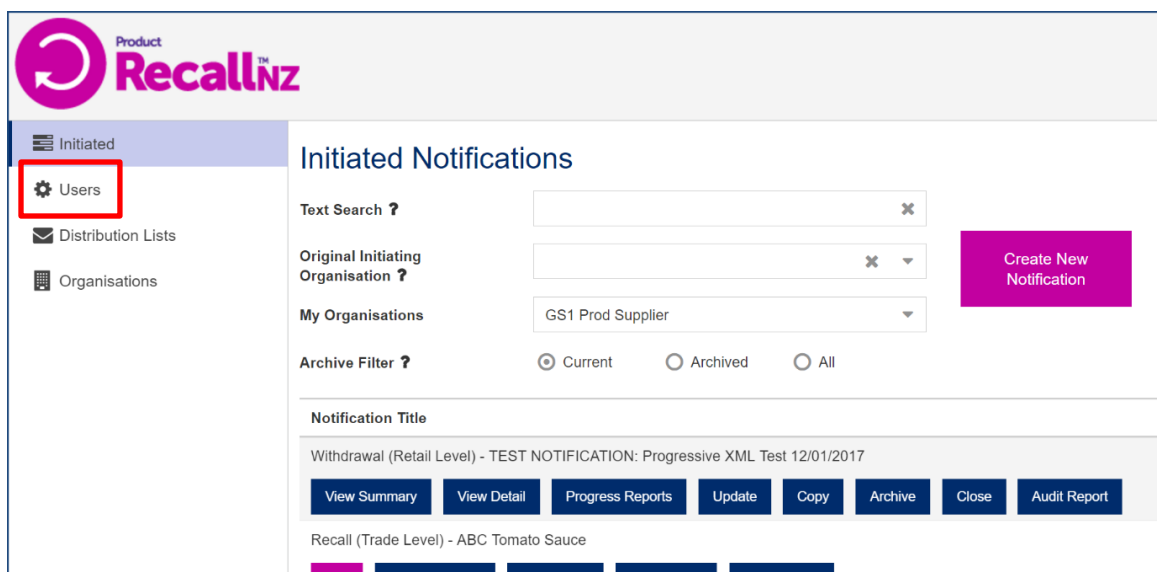
1. Click on 'Users' on the left-hand menu
2. Search in the username/Name filter box for the user's name or username.
3. Once you have located the user, double-click on the user or click the 'edit' icon to open the editing screen.

4. On the bottom-right corner of the screen, click the 'Reset Password' button to reset their password.

5. This will send an email to the user letting them know that their password has been reset and that they must create a new one. Please note: This link expires after 2 days so please make sure the user is aware of this.

This is the email that the user will receive within a couple of minutes of the password being reset. They will need to click the link to set a new password.

ProductRecallNZ Password Reset   Inbox   x

ProductRecallNZ@gs1nz.org   10:52 AM (2 minutes ago)

to me

Dear Supplier GS1,

You have received this email as a request has been made to reset your password in ProductRecallNZ. If you did not make this request, please contact GS1 NZ on 0800 10 23 56.
To reset your password, click on the link below

https://www.productrecallnz.org?resetToken=239SRQHSHU2BUE0BKA000000WG019A

This link (directly above) will open up the Password Reset page

1. Enter your username
2. Enter a password in the New Password Field. This must be at least 8 character long and contain at least one number and one special character (e.g. @ ! & *)
3. Re-enter the same password in the Confirm Password Field
4. Press the Reset Password Button
5. Please now log in using your new password to activate your account

Please note that this link will expire after 2880 minutes (2 days).

If you have any questions, or for further information regarding ProductRecallNZ, please contact us at productrecallnz@gs1nz.org or on 0800 10 23 56.

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