



# ProductRecalINZ: User Administration Guide

## The purpose of this document

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

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#### **Document Owner**

Jennifer Tate

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#### 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 ProductRecalINZ 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 ProductRecalINZ User Management

Upon logging in to your ProductRecalINZ 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 -

Users List												
Username / Name <b>?</b>				×			Account Administra	tor	Adminis	strator	Contac	ot
Organisation <b>?</b>	gs1 prod	private receiver		×			Approver		GS1 Gl	obal 🗌	] Initiato	r
Status <b>?</b>	<ul> <li>Active</li> </ul>	O Suspended O	All				Receiver		Regulat	tor 🗌	Viewer	r
											+	Add User
Organisation		Name	Active	Admin	Contact	Approver	GS1 Global	Initiator	Receiver	Regulator	Viewer	
GS1 Prod Private Receiv	ver 1	Supplier GS1										<b>A</b>
GS1 Prod Private Receiv	ver 2	Supplier GS1										

# 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.

Users List										
Username / Name			;	•	Accoun <sup>-</sup> Adminis	-	🗌 Admir	nistrator	Cont	act
Organisation			×		Approve		Initiate	or	View	ver
Status	• Active	Suspended O All								
								_	→ [+	Add User
Organisation		Name		Active	Admin	Contac	t Approver	Initiator	Viewer	
NZ FOOD DISTRIBUTO	RS LIMITED	Jane Doe								
NZ FOOD DISTRIBUTO	RS LIMITED	John Doe								
《     Yeage       Previous     Next	1 of 1 >	» 2			Export	t User D€	etails	Export Us	Displayin ser by Orga	g 1 - 2 of 2 nisation





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 <u>this article</u>.

Edit User				A
Username <b>?</b>	James@recall.com	User is a User Administ	rator ?	
First Name \star	James	User is a Team Leader		
Last Name \star	Doe			
Email *	james@recall.com	User is a Notification Co	ontact ?	
Mobile				
Phone <b>*</b>	098787878			
Job Role	QA Manager			
Time Zone \star	(UTC+12:00) Auckland, Wellingto			
User is active?				
Roles by Organisation *				
Filter Organisation	× -	Show Only Organisation	s Attached to User	
Organisation		Approver <b>?</b>	Initiator ?	Viewer ?
NZ FOOD DISTRIBUTORS L	IMITED			
« < Page 1	of 1 > > <b>2</b>			Displaying 1 - 1 of
Previous Next			Reset Pas	ssword Save & Next

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					
S 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					
Seman Email Notification Submitted for Approval					
S EMAIL Reminder - Notification Go-Live Required					
S EMAIL Notification Approved					
S EMAIL Notification Rejected					
S EMAIL Reminder - Notification Approval required					
SMS Reminder - Notification Approval Required					
S EMAIL Notification Go Live					
S 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 <u>log in for the first time</u>.

## 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 <u>Section 1</u> to add a user. Once the user has been saved, double-click on the user to enter the editing screen.

Roles by Organisation *							
Filter Organisation	× -	Show Only Organisation	ns Attached to User				
Organisation	Approver	Initiator	Receiver	Viewer			
Supermarket 1			2 🗹				
<pre></pre>	Once you have found the location in the list, select a role for user then press save. Repeat this process for each new location you wish to add.						
Previous Next	p. court	Reset Pass 3 Sa					

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.

Edit User			
Username	Anne@ABCfood.com	User is a User Administrator	V
First Name \star	Anne	User is a Team Leader	
Last Name \star	Doe		
Email *	Anne@ABCfood.com	User is a Notification Contact	
Mobile		Contact Types	Central Other
Phone <b>*</b>	098787878	Select 'User is a Notification	Customer
Job Role	Food Safety Coordinator	Contact' and then choose the contact type. Please note that a user can be a contact,	Services / Sales Reimbursement
Time Zone \star	(UTC+12:00) Auckland, Wellington	as well as have other roles such as Initiator or Approver.	Media
User is active?	$\checkmark$		J

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 <u>Section 3</u> 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, <u>add them as a user</u> with a <u>notification contact role</u> and then add them to the organisation as a 'Viewer' role only.

Edit User					
Username	Anne@ABCfood.com		User is a User Administrator		
First Name \star	Anne		User is a Team Leader		
Last Name \star	Doe				
Email *	Anne@ABCfood.com	1	User is a Notification Contact	<b>⊻</b>	
Mobile			Contact Types	Central Coordinator	Other
Phone *	098787878	Select 'User i	is a Notification Contact' and then	Customer Services / Sales	Pickup     Reimbursement
Job Role	Food Safety Coordinator	choose the C On 'Roles by	Contact Type.	Info	-
Time Zone \star	(UTC+12:00) Auckland, Wellington		isation and then select them as a	Media	
User is active?		Press 'Save a messaging p	and Next' and then choose their references.		
Roles by Organisation *			able to login and view the in preparation for their role in the awal.		
Filter Organisation		<b>x</b> -	Show Only Organisations Atta	iched to User 🗹	
Organisation	Α	pprover	Initiator	Receiver	Viewer
ABC Food Distributors Limit	ed		D	۲	
≪ < Page 1	of 1   > > <b>3</b>				Displaying 1 - 1 of 1
Previous Next				Reset Passv	4 Save & Next

When you click 'Save and Next', you will be taken to <u>the User Messaging preferences</u> 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.

Edit User						
Username	Anne@ABCfood.com		User is a User Adm	ninistrator		
First Name 🔺	Anne		User is a Team Lea	ıder		
Last Name \star	Doe					
Email *	Anne@ABCfood.com		User is a Notification	on Contact		
Mobile			Contact Types		Central Coordinator	Other
Phone *	098787878				Customer Services / Sale	Pickup
Job Role	Food Safety Coordinator				Info ☐ Consumer Hoti	
Time Zone \star	(UTC+12:00) Auckland, W	/ellington 💌			Media	line
User is active?						
Roles by Organisation *						
Filter Organisation		× -	Show Only Organis	ations Attac	hed to User 🛛 👻	3
Organisation		Approver	Initiator		Receiver	Viewer
Supermarket 1						
≪ < Page 1	of 1   > >>	C				Displaying 1 - 1 of 1
Previous Next					Re	eset Password Save

You will be taken to a screen with user preferences. Importantly, this is the screen where you can make a <u>user active or inactive</u>, make them a <u>notification contact</u> (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 <u>'User Messaging' screen</u>. 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 <u>this article</u> 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.

Edit User		
Username	Anne@ABCfood.com	User is a User Administrator
First Name \star	Anne	User is a Team Leader
Last Name \star	Doe	
Email *	Anne@ABCfood.com	User is a Notification Contact
Mobile		
Phone *	098787878	
Job Role	Food Safety Coordinator	
Time Zone \star	(UTC+12:00) Auckland, Wellingto	
User is active?	De-select this to remove the user f	rom all roles in all organisations.

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

Warning
You are deactivating a user. This will disable the user's access to all organisations. Do you want to continue?
Yes No





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 (<u>www.productrecallnz.org</u>) by clicking the 'Forgot your Password?' link, it may be preferable for the account administrator to reset a user's password on their behalf.

Recal	lňz			
Initiated	Initiated Notifications			
🔅 Users	Text Search ?	36		
<ul> <li>Distribution Lists</li> <li>Organisations</li> </ul>	Original Initiating Organisation <b>?</b>	× ×	Create New Notification	
	My Organisations	GS1 Prod Supplier		
	Archive Filter ?	Current     Archived     All		
	Notification Title			
		- TEST NOTIFICATION: Progressive XML Test 12/01/2017		
	View Summary View	w Detail Progress Reports Update Copy Archive C	lose Audit Report	
	Recall (Trade Level) - AB	C Tomato Sauce		

- 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.





Edit User			
Username <b>?</b>	jenn@supplier.org	User is the Account Administrator? <b>?</b>	
First Name \star	Supplier		-
Last Name \star	GS1	User is a User Administrator <b>?</b>	
Email <b>*</b>	jennifer.tate@gs1nz.org	User is a Team Leader <b>?</b>	
Mobile <b>?</b>		User is a Notification Contact <b>?</b>	
Phone 🗱	0212961700		
Job Role	GS1		
Time Zone <b>? *</b>	(UTC+12:00) Aucklar 🔹		
User is active? <b>?</b>			
Roles by Organisation *			
Previous Next			Reset Password Save

- 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.

ProductRecalINZ Password Reset Inbox x					
•	ProductRecalINZ@gs1nz.org to me ▼	10:52 AM (2 minutes ago) 🔬	• •		
	Dear Supplier GS1,				
	You have received this email as a request has been made to reset your password in ProductRecalINZ. 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 <a href="https://www.productrecalInz.org?resetToken=239SRQHSHU2BUE0BKA00000WG019A">https://www.productrecalInz.org?resetToken=239SRQHSHU2BUE0BKA00000WG019A</a>				
	This link (directly above) will open up the Password Reset page				
	<ol> <li>Enter your username</li> <li>Enter a password in the New Password Field. This must be at least 8 character long special character (e.g. @ ! &amp; *)</li> <li>Re-enter the same password in the Confirm Password Field</li> <li>Press the Reset Password Button</li> <li>Please now log in using your new password to activate your account</li> </ol>	and contain at least one number a	nd one		
	Please note that this link will expire after 2880 minutes (2 days).				
	If you have any questions, or for further information regarding ProductRecalINZ, please or on 0800 10 23 56.	contact us at productrecalInz@gs	1nz.org		
	GS1 New Zealand   0800 10 23 56				
	GS1 New Zealand Inc.   P.O. Box 11-110 Wellington 6142 GS1 - The Global Language Of Business				