Product Recall

SYSPRO 8

Reference Guide

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Recall Management

Recall Management

Exploring

Where it fits in?

The **Recall Management** feature caters for a request from a manufacturer to return a product after the discovery of safety issues or product defects that might endanger the consumer or put the organization at risk of legal action.

A product recall can be applied at warehouse, bin, stock code, lot or serial level (effectively placing them on hold) and may affect sales orders, jobs, parent parts and kits.

The product recall process includes stock items that were manufactured, sold and delivered to the customer, as well as items that were receipted into stock and are still residing in the warehouse.

Navigation

The programs related to this feature are accessed from the **Program List** pane of the SYSPRO menu:

- *Program List > Lot Traceability*

Terminology

Mock product recall

A mock recall is an exercise that involves imitating all procedures for an actual product recall. In SYSPRO, this tests the traceability of products and verifies that the recall process is effective and can be carried out within the required time limit.

Products involved in a mock recall aren't actually put on hold (i.e. transactions such as invoicing and generating delivery notes can still be processed against them).

Mock product recall data is stored for compliance reasons and traceability audits.

Full product recall

This occurs when there are safety concerns over an item (or manufacturing defect in a product) that may be harmful to the consumer. This results in one or more products having to be withdrawn from the market.

SYSPRO's Lot Traceability system is used to identify all items and transactions involved in the recall. Items are placed into quarantine for inspection.

Contaminated or sub-standard stock items are scrapped, while unspoiled or undamaged items are released from quarantine.

Quarantine

During a product recall, stock items which are spoiled, hazardous or of inferior quality are isolated and placed into quarantine. This can be done at serial, lot, bin or stock code level.

A quarantined stock item can't be invoiced, distributed, delivered or allocated to a job or any stock movement. Once inspection of the item is complete, it can be released back into stock (if it's usable) or scrapped.

Traceability

Traceability refers to the ability of an organization to verify the history, location, or application of an item based on documented identification records.

Traceability is required in certain industries for a number of reasons:

- Stock control
- Asset control
- Order tracking
- Food Recall (e.g. being able to trace and account for every unsafe food item suspected of contamination; ranging from items still in the warehouse to those dispatched to customers).

Starting

Prerequisites

To use this feature, the following setup option(s) must be enabled:

Setup Options

Setup Options > Configuration > Distribution > Inventory

- Associate serials by bin

Security

You can secure this feature by implementing a range of controls against the affected programs. Although not all these controls are applicable to each feature, they include the following:

- You can restrict operator access to *activities* within a program (configured using the **Operator Maintenance** program).

- You can restrict operator access to the *fields* within a program (configured using the **Operator Maintenance** program).

- You can restrict operator access to *functions* within a program using passwords (configured using the **Password Definition** program). When defined, the password must be entered before you can access the function.

- You can restrict access to the eSignature *transactions* within a program at operator, group, role or company level (configured using the **eSignature Setup** program). Electronic Signatures provide security access, transaction logging and event triggering that gives you greater control over your system changes.

- You can restrict operator access to *programs* by assigning them to groups and applying access control against the group (configured using the **Operator Groups** program).

- You can restrict operator access to *programs* by assigning them to roles and applying access control against the role (configured using the **Role Management** program).
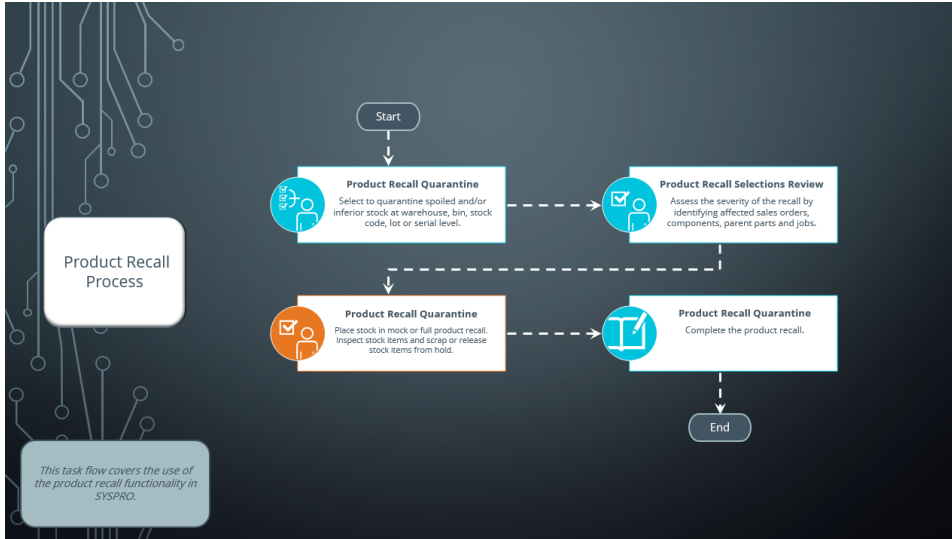
Restrictions and Limits

- Only traceable or serialized stock items can be recalled.

- Although sales orders containing an item that is subsequently included in a product recall (or that was placed on hold because of a product recall) can still be invoiced and delivered, this will be addressed in the next development phase of this feature.

- Security checks are ignored when processing a mock product recall, except for access to the selected warehouse (which is always verified).

Using
Process

The programs related to this feature are accessed from the **Program List** pane of the SYSPRO menu:

- *Program List > Lot Traceability > Product Recall*
- *Program List > Inventory > Transaction Processing*
- *Program List > Administration > Archiving*

1. Capture and maintain the product recall using the **Product Recall Quarantine** program.

   This program lets you quarantine, inspect, release from hold or scrap stock items.

2. View the impact of including a stock code in the product recall at various levels using the **Product Recall Selections Review** program.

3. Set the product recall to complete using the **Product Recall Quarantine** program.

4. View details and history of product recalls using the **Product Recall Query** program.

5. When required, archive product recall data using the **Archive Maintenance** program.

Status Codes

Product Recall

The following are possible status codes for Product Recall:

Status	Description
Q - QUARANTINE	This status indicates items are isolated and can't be included in sales orders, jobs or any stock movement.
I - INSPECT	This status indicates items are isolated and are being inspected.
R - RELEASED	This status indicates that the items have been inspected, declared safe for use and released back into the warehouse.
S - SCRAP	This status indicates that the items have been inspected, declared unsafe for use, removed from the warehouse and discarded.

Affected Programs

The following indicates areas in the product that may be affected by implementing this feature:

Product Recall Selections Review

This is a new program that lets you see the impact of including items in a product recall.

Product Recall Quarantine

This is a new program that lets you capture and maintain product recalls.

Product Recall Query

This is a new program that lets you view details of product recalls.

Product Recall Browse

This is a new program that lets you browse a list of product recalls.

Additional Lot Browse

This is a new program that lets you browse a list of additional lots held on file.

Product Recall Archive Browse

This is a new program that lets you browse details of product recalls that have been archived.

Lot Number Maintenance

The **On hold** field is disabled if a lot was placed on hold during a product recall process.

Inventory Bin Maintenance

You can't delete a bin, or release a hold placed on it, if it forms part of a product recall quarantine.

Stock Code On Hold Maintenance

You can't delete a stock code, or release a hold placed on it, if it forms part of a product recall quarantine.

Serial Number Maintenance

You can't delete a serial, or release a hold placed on it, if it forms part of a product recall quarantine.

Warehouse Maintenance

You can't delete a warehouse that forms part of a product recall quarantine.

Job Receipts

An error message is displayed if the selected stock code forms part of a full product recall and the stock was placed on hold at stock code level.

WIP Job Receipts Import

An error message is displayed if the selected stock code forms part of a full product recall and the stock was placed on hold at stock code level.

Purchase Order Inspection

An error message is displayed if the selected stock code forms part of a full product recall and the stock was placed on hold at stock code level.

Shipment Receipt

An error message is displayed if the selected stock code forms part of a full product recall and the stock was placed on hold at stock code level.

Purchase Order Receipts

An error message is displayed if the selected stock code forms part of a full product recall and the stock was placed on hold at stock code level.

Archive Maintenance

The **Include** function has a new **Product recall** selection option that lets you include product recalls when archiving files.

Purge and Archive

A **Product Recall Archive Details** section has been added that lets you specify criteria according to which you want to archive product recall details. Options include:

Field	Description
Product recall archive	Select this to include product recall data when archiving.
Product recall archive number	This indicates the archive file name that is generated.
Product recall completed	This indicates the cut-off date according to which you want completed product recall records to be archived.
Product recall comment	This lets you add a comment for archived product recalls.

Browse on Lots

The **Selection criteria** pane includes a **Search on additional lots** option that lets you include a single or range of additional lots.

Document Print

You can print **Additional lot names** when printing lots.

Traceability Query

Additional lot names are displayed (if they have been defined).

Lot Product Recall Detail Report

This is a new program that lets you print a detailed report of product recall information.

Lot Product Recall Summary Report

This is a new program that lets you print a summary report of the most essential product recall data.

Hints and Tips

- You can archive product recall data using the **Archive Maintenance** program.

  You can view archived product recall data using the **Product Recall Archive Browse** program (available from within the **Archive Maintenance** program).

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