

# Product Recall

SYSPRO 8

Reference Guide

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# 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.

The product recall process includes any traceable parent item that has been received into stock, ensuring it can be quickly and easily located in the supply chain. It means that lot and serial traceable items received through jobs, inventory movements, backflushing or purchase orders are included when selecting items you want to recall using the **Product Recall Selections Review** program.

The parent item of contaminated or defective products can optionally be included in the **Product Recall Selections Review** to ensure that all potentially spoiled items are identified.

Although this initially increases the list of items included, filtering options are available to refine the results (typically useful for companies that retain traceability data and don't archive lots). This list can then be used by companies to identify the affected products.

## 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 restrict operator access to *activities* within a program 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).

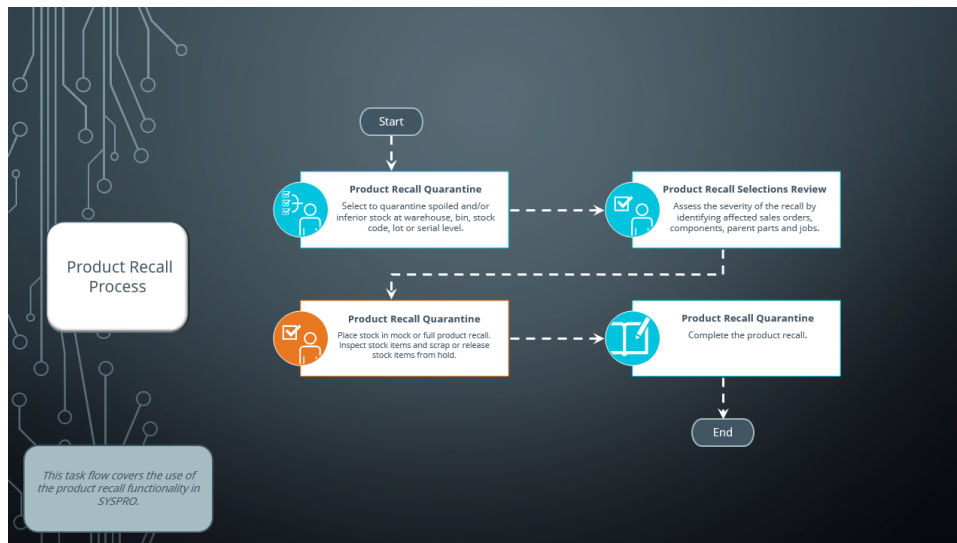
## Restrictions and Limits

- Only traceable or serialized stock items can be placed on hold as a result of a product recall. A stock code that is not traceable / serialized can only be put on hold when it is linked to the recalled traceable or serialized stock item via a job.
- The **Recall Management** feature can't indicate which component is defective or which ingredient is contaminated, as that needs to be established at a testing site or in a laboratory. The system is designed to identify all the potentially affected components or ingredients used in the sub-standard product and then list all the products in which these

components or ingredients were also used. All ingredients and components as well as the products in which they were used are deemed suspect until proven otherwise.

- 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.
- 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:

### Setup programs

#### 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.

#### Serial Number Maintenance

*Program List > Inventory > Serial Tracking System > Setup*

You can't delete a serial, 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.

#### Warehouse Maintenance

*Program List > Inventory > Setup*

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

#### Archive Maintenance

*Program List > Administration > Archiving*

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

## Transaction Processing programs

### Product Recall Quarantine

*Program List > Lot Traceability > Product Recall > Transaction Processing*

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

### Job Receipts

*Program List > Work in Progress > Job Postings*

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

*Program List > Purchase Orders > Purchase Order Processing*

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

*Program List > Purchase Orders > Landed Cost Tracking > Transaction Processing*

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

*Program List > Purchase Orders > Purchase Order Processing*

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.

## Period End programs

### 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.

## Import programs

### WIP Job Receipts Import

*Program List > Administration > 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.

## Report and Update programs

Document Print

*Program List > Sales Orders > Sales Order Processing*

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

## Report programs

Inventory Batch on Hold

*Program List > Inventory > Reports*

This report generates a list of stock codes, warehouses, bins, lots and serials grouped according to their hold status and product recall type.

Lot Product Recall Detail Report

*Program List > Lot Traceability > Product Recall > Reports*

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

Lot Product Recall Summary Report

*Program List > Lot Traceability > Product Recall > Reports*

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

## Query programs

Product Recall Selections Review

*Program List > Lot Traceability > Product Recall*

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

Product Recall Query

*Program List > Lot Traceability > Product Recall*

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

Traceability Query

*Program List > Lot Traceability*

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

## Browse programs

### Product Recall Browse

*Program List > Lot Traceability > Product Recall > Browsers*

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

### Additional Lot Browse

*Program List > Lot Traceability > Browsers*

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.

### Browse on Lots

*Program List > Lot Traceability > Browsers*

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

### Inventory Multiple Bin Browse

This is a new program that lets you view multiple bins per company.

## 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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