Recall User Guide

Recall User Guide

Contents

About Recall ▶ ▶

Recall was developed by GS1 Canada in association with founding partners in multiple industry sectors to establish a standardized, industry-driven communication tool enabling manufacturers and suppliers to share real-time recall notifications with hospital and retail trading partners in a secure and efficient manner.

Recall helps you to ensure:

- Speed, accuracy and traceability of recall communications
- Common, standardized recall notification
- Date-stamped records of all communications
- Improved efficiency using standards and automation
- Consumer protection and confidence
- Brand protection and assurance

The program's features include:

- Faster creation and distribution of recall notifications
- Date-stamped records of all notifications, providing traceability
- Tracks recall notices being read and acknowledged
- Automatic reminders and record keeping
- Numerous time saving efficiencies, using standards and automation
- Accuracy and completeness of information

Firms recalling products (for example suppliers, manufacturers) are able to send information directly to hospital and retail trading partners, distributors or wholesalers and other organizations via the web-based tool. Recall prioritizes key information, captures who received notification and when, and includes complete recall contact information and handling instructions.

Registration Levels

There are three registration levels within Recall:

- Initiator
- Receiver
- Initiator and Receiver

Initiator registration level company initiates a Recall notification.

Initiator and Receiver registration level company can initiate a notification and take action or forward a notification.

Receiver registration level company receives a Recall notification and takes action.
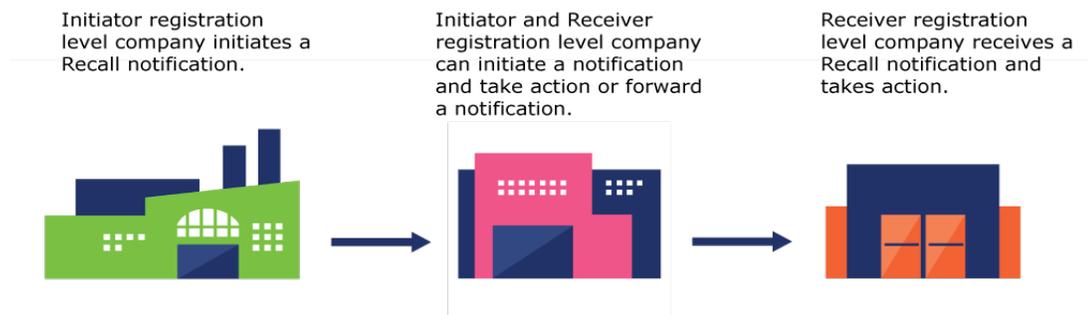
Initiator Registration Level

A company with Initiator registration level is typically a manufacturer or supplier of raw materials or finished goods. These companies are responsible for providing accurate, clear and timely information regarding a recalled product to a Receiver company so that the receiver can take appropriate action.

Receiver Registration Level

A company with Receiver registration level can be a distributor or wholesaler, an organization or a retail trading partner. These companies are responsible for taking action on the recall information from the Initiator company in a timely manner.

If your company is registered to use Recall Internal Locations Distribution, at least one of your company locations will have the option to re-distribute a recall notification to multiple internal locations. For more information, or to register for Internal Locations Distribution, call 1.800.567.7084.

Initiator and Receiver Registration Level

A company with Initiator and Receiver registration level can be a manufacturer who receives raw materials, a distributor who receives finished goods, an importer who sells wholesale or any combination of these. This company may act as either an Initiator or a Receiver depending on the organization's relationship with the recalled product. These companies are responsible for both creating accurate, clear and timely information regarding a recalled product and taking action on a notification received from an Initiator.

Initiator and Receiver Company with Internal Locations Distribution

If you are registered to Recall with Internal Locations Distribution, your company registration level must be Initiator and Receiver. With this configuration, if your "parent" company head office or managing administration office receives a recall notification, you can forward that notification to internal or "child" locations within your company.

To perform this action, you must have both Initiator and Receiver user roles.

User Roles

All user roles are assigned by the subscription administrator for the subscriber company. See the *myGS1 Administrator Guide* for instructions on establishing user roles. You can find the guide on the Recall Technical Documents page.

Subscription Administrator

It is the responsibility of the subscription administrator to assign users to the roles required to use Recall. Unless the roles have been assigned by the subscription administrator, your company is not able to use Recall.

It is also the responsibility of the subscription administrator to subscribe to or modify subscription details to any GS1 Canada service.

Depending on the registration level (Initiator, Receiver or Initiator and Receiver), the subscription administrator must register at least one user for each Recall role as follows:

Registration Level	Initiator Role	Approver Role	Receiver Role
Initiator	X	X	
Receiver			X
Initiator and Receiver	X	X	X

Initiator

The Initiator completes the recall notification and includes any attachments. This role also identifies target recipients. The Initiator then sends the completed recall notification to the approver. The Initiator cannot send a recall notification to trading partners.

Approver

The Approver receives a completed recall notification that has been submitted by the Initiator. The Approver reviews the submitted recall notification, attachments and associated target recipients and can choose to reject the notification, or approve it and send it live. The Approver cannot create a recall notification.

Receiver

The Receiver is the targeted recipient of the recall notification. The Receiver will use the information included in the recall notification, including attachments, to carry out the appropriate actions identified in the notification. The Receiver cannot create, approve, or send an original recall notification.

User Roles for Internal Locations Distribution

To give a user permission to forward received notifications from a "parent" company to internal "child" locations, that user must have all user roles: Receiver, Initiator and Approver.

For more information, see "Initiator and Receiver Company with Internal Locations Distribution" (page 7).

Receiving Recall Email Communications

To ensure that any email communications from Recall are received, all participants must ensure the @gs1ca.org email domain is open to Firewalls and allowed by any virus protection software.

Email communications from Recall include notifications of logon IDs and passwords during the setup process and recall notifications during the execution of a product recall. The ability to successfully receive these emails is a critical component of using the Recall service.

Requirements for Accessing Recall

The following is required to use Recall:

- Internet connection
- Valid User Name and Password

Logging into Recall

If you have never logged into myGS1 before, or if you have received an Account Updated email, to log in to Recall for the first time, you must have received a Welcome email from GS1 Canada. This email gives you the instructions to log in for the first time.

To open subsequent sessions of Recall, you will use an email address and password.

Steps:

1. To open the login page, go to https://www.gs1ca.org/login.asp?.
2. Enter your email address and password.

If you have forgotten your password, click Forgot Your Password and follow the instructions.

3. Click Login.

After you log into myGS1, your landing page appears.

If you have access to multiple companies or company divisions, you must select a company from the drop-down list.

After you have selected a company or company division, or if you have access to only one company, the myGS1 Home page appears.

The My Tools panel displays a link to each GS1 Canada tool to which your company is registered.

4. Select the Recall link with your industry sector name on it.
   Attributes that appear when identifying items reflect the industry sector that you choose.
   The Select Mock Recall or Live Recall page appears.
5. Click Live Recall.

   The Recall main page appears.

The main page is a console from which you can perform multiple tasks.

Recall Main Page ▶

After you complete the login process, in myGS1, select Recall for your industry sector and click Live Recall, the Recall workspace appears. In the bar across the top at the right, there is the selected industry sector name and a number of command links:

- Access Mock Recall – Open the Mock Recall environment. You can practice issuing a product recall in this environment. For information about Mock Recall, see the Mock Recall User Guide.
- Settings – Specify your language preference and set your time zone. As well, you can configure alert settings and receiver settings. For more information, see "Settings" (page 38).
- myGS1 – Close Recall and return to myGS1.

Under the command bar is the Recall banner. On the right side of the banner, your name, your company name and your user role or roles appear.

Under the Recall banner is the tab bar. The following conditions determine what appears here:

- If your registration level is "Initiator", only the My Company Notifications tab appears.

- If your registration level is "Receiver", only the Received Notifications tab appears.
- If your registration level is "Initiator and Receiver", the Recall main page shows two tabs that are described in the following chapters:
  ○ Received Notifications
  ○ My Company Notifications

Received Notifications ▶

If your registration level is "Receiver" or "Initiator and Receiver", this tab appears. For a description of registration levels, see "Registration Levels" (page 6).

This page shows a list of notifications that you have received from various initiating companies. A number on the tab label shows the number of notifications that are unread.

If you choose not to view a notification right away, the system will send reminders over the next 48 hours. If you choose not to take action on a notification, the system will send reminders at 7 days and 28 days after the notification.

Each time a recall is issued to a Receiver company or a company that is Initiator and Receiver, a notification appears in this list. The notification in this list contains the name of the company issuing the recall, a notification title, Notification ID and other details.

If the list contains a large number of items, to help find a specific item you can change the way this list appears:

- To show only archived notifications, select the Show Archived Notifications check box.

- A Search text box appears at the top of the following columns:

  Notification Title

  Notification ID

  Initiating Company

  Date Issued

- To find an item using a pattern of characters, in Search type some characters and then click Search.

  Only those items that match the pattern appear in the list.

- A filter appears at the top of the following columns:

  Product Type

  Classification

  Report Status

To find an item using a filter, select an option from one of the filter drop-down lists. The list changes to display only those products that match the filter option.

- To sort the list by any column, click the column header. An arrow indicates the sort order. To sort the list in the opposite order, click the column header a second time.

In the list of notifications, unread notifications appear in bold text.

Actions on Received Notifications Page

You can quickly jump to an action page from Received Notifications.

Steps:

1. To perform an action on a notification from the Received Notifications page, click the plus sign (✚) next to the Notification Title.

   A series of command buttons appear.

2. Buttons that appear here are different, depending on the Report Status of the notification. You can perform the following actions:

   ○ Notes – Create or add to a note thread that can be used by other Recall users to help communicate issues around this notification.

   ○ Distribute – Appears on all notifications if the registration level is Initiator and Receiver. For other registration levels, this action appears only if the notification is an update. Send the update to the appropriate contacts.

   ○ Report Progress – Add comments on corrective actions, change product status and view history of a recall notification.

   ○ Quantity Found - Report quantities of product found in your inventory.

   ○ Archive – Appears only if the Report Status is "Completed". Remove this item from the list of notifications.

   ○ View – View details of the notification.

For a more complete description of these actions, see "Details of Actions" ().

Bundle Received Notifications

To help you deal with multiple notifications that you may have received from different sources for a single GTIN, you can bundle notifications together.

To view all notifications in a bundle, open any bundle notification and select Notification Snapshot.

Create a Bundle

Starting in the Received Notifications tab, do the following:

1. In Search, enter or paste a GTIN for which you have received a notification.
2. Click Search.

   All the notifications that contain this GTIN appear in the Received Notifications list.

   As well, the Bundle Name field appears.

3. On the right side of each notification in the list, to include a notification in the bundle, select the check box.

   To select all items in the list, select the right column check box at the top of the list.

4. In Bundle Name, give this bundle a descriptive name.
5. Click Save.
6. Each selected notification shows a bundle icon (💼) in the Notification Title.

The bundle is created.

Delete a Bundle

If you have created a bundle and want to revise it, you must delete the bundle and create it again.

1. In the Received Notifications tab, for any notification in the bundle, click the plus sign (➕) to the left of the Notification Title.

   A series of buttons appears.

2. To be sure that you have selected a notification from the right bundle, hover your mouse pointer over the bundle icon (💼) and read the name of the bundle.
3. In the series of buttons, click Delete Bundle.

   Note, you cannot undo this action.

   A confirming message appears.

4. Click Delete.

A message confirms that the bundle has been deleted. Bundle icons are removed from these notifications.

Actions on Notification Information Page

To open the Notification Information page, in Received Notifications click on a Notification Title in the list.

On the navigation column, there are two sections:

- Review
- Action

Review

There are three views that you can use to review details of the notification:

- Notification Snapshot – View identification details, status and creation details.
- Notification Information – View identification details and details around products, including an identifying image, instructions and contacts.
- Notification Summary - View a summary description of the notification along with minimal details of the product.

Action

You can perform the following actions:

- Download PDF
- Summary Notification PDF
- Notes
- Distribute - Does not appear for Receiver type companies.
- Report Progress

For descriptions of these actions, see "Details of Actions"().

My Company Notifications

If your registration level is "Initiator" or "Initiator and Receiver", this tab appears. For a description of registration levels, see "Registration Levels" ().

This page shows a list of notifications that have been initiated by your company. A number on the tab label shows the number of notifications that are in Draft status and pending approval.

If the list contains a large number of items, to help find a specific item you can change the way this list appears:

- To sort items by date with the most recent item at the top of the list, select the Show Latest Notification check box.

- To show only archived notifications, select the Show Archived Notifications check box.

- A Search text box appears at the top of the following columns:

  Notification Title

  Notification ID

  Date Issued

To find an item using a pattern of characters, in Search type some characters and then click Search. Only those items that match the pattern appear in the list. You can match a pattern to the Title, ID or Date values.

- A filter appears at the top of the following columns:

Product Type

Classification

Status

To find an item using a filter, select an option from one of the filter drop-down lists. The list changes to display only those products that match the filter option.

- To sort the list by any column, click the column header. An arrow indicates the sort order. To sort the list in the opposite order, click the column header a second time.

Actions on My Company Notifications Page

On the right side of the work area, there is a button for Create New Notification. For details about this function, see "Initiator Duties" (page 22).

You can quickly jump to an action page from My Company Notifications.

Steps:

1. To perform an action on a notification in the My Company Notifications page, click the plus sign (+) next to the Notification Title.

   A series of command buttons appears.

   Below the command buttons, the Translations Required status appears. If this status shows "Yes", it indicates that values have been included in the Translations tab. For more information, see "Translations" (page 28).

2. You can perform the following actions:

   - Add Recipients - This link appears only if the notification status is "Live". Click here to open the Add Recipients page. For more description of this function, see "Subscribed Recipients" (page 28).

   - Close - This link appears only if the notification status is "Live". You can close a live notification to clear it from your list of notifications. You cannot undo this action. When you click here, a confirmation message appears. Click Close. The notification is removed from the list.

   - Copy – If you are creating more than one notification and many of the attribute values are the same, generate a copy of one notification and change the few attributes that are different.

   - Delete – Appears only if the status is "Draft". Remove a notification.

- Download Initiator PDF - This PDF document is available in English and French and contains details of the recall notification and a list of recipients. The file is saved to your default Downloads folder. Use this if you need to send a separate record of the notification to a governing office or an auditing office.

- Download Receiver PDF - This PDF document is available in English and French and contains details of the recall notification. The file is saved to your default Downloads folder. Use this to send a notification to a recipient who does not have access to email.

- Notes – Create or add to a note thread that can be used by other Recall users to help communicate issues around this notification.

- Edit – Appears only if the status is "Draft". Open the notification in edit mode.

- Withdraw – Appears only if the status is "Submitted for Approval". You can withdraw a notification that has been submitted.

- Close – Appears only if the status is "Live". After you can confirm that all recipients have viewed this notification, you can change the notification status to "Close".

- Update – Appears only if the status is "Live". Change details of the notification and prepare to distribute the change.

- Report – Appears only if the status is "Live". View an activity report for individual recipients who have completed the form in the Recall Notification System.

- Submit for Approval – As an Initiator, you must submit the notification for approval.

- View – View details of the notification.

Details of Actions

This chapter describes details of various actions you can perform in Recall either from the command buttons or while viewing notification details. Descriptions of actions are presented in alphabetical order.

Archive

As an Initiator, you can archive notifications with "Closed" status.

As a Receiver, you can archive notifications with "Completed" status.

Caution: You cannot undo this action.

To open the Archive page from Received Notifications, click the plus sign (+) next to a completed notification and click Archive.

In the Archive page, click Archive. The Received Notifications page appears and the notification is removed from the list.

Delete

In My Company Notifications you can delete a notification with status "Draft".

Caution: You cannot undo this action.

Steps:

1. Click Delete.

   A confirming message appears.

2. Click Delete.

The My Company Notifications page appears with the notification removed.

Distribute ▶

You must have both the user roles of Initiator and Receiver.

This action appears only if your registration level is Initiator and Receiver. For more information about this registration level, see "Registration Levels" (page 6).

You can distribute any received recall notification. After you click Distribute, a copy of the recall notification is created.

This action changes your tab from Received Notifications to My Company Notifications. Here you can edit the information, add recipients and distribute it.

If this is an update and you have already distributed the original notification, this will create an update to the original.

For help with selecting recipients or changing another part of the notification, see "Stage 2: Edit Notification" (page 24).

Download PDF

This section describes four links in the Action section:

- Download Initiator PDF (English/French)
- Download Receiver PDF (English/French)

Download Initiator PDF

This PDF document is available in English and French and contains details of the recall notification and a list of recipients. The file is saved to your default Downloads folder.

Use this if you need to send a separate record of the notification to a governing office or an auditing office.

Download Receiver PDF

This PDF document is available in English and French and contains details of the recall notification. The file is saved to your default Downloads folder. Use this to send a notification to a recipient who does not have access to email.

Note: In Received Notifications, this link appears as "Download PDF".

Go Live

As an Approver, you can send a notification to all targeted recipients.

The Go Live link appears as part of the Approver process. See "Stage 3: Reject the Notification or Approve it and Send Live" ().

In the Go Live page, do the following:

1. Select the check box next to the correctness statement.
2. Optionally you can select a different date and time.
3. Click Go Live.

   A message appears showing that the notification has been distributed.

In My Company Notifications, the notification appears with status "Live".

Note: After you have sent the notification to all targeted recipients, if there are undelivered messages, you will receive an email alert that lists companies that could not be contacted because they had permanent delivery errors.

KPI Report

This report shows an aggregated activity report across all recipients for a live notification.

To open the KPI Report page, in My Company Notifications you must open a notification with status "Live". In Reports, click KPI Report.

Information in the Notification Details panel identifies the recall notification.

The Consolidated Report - Communication Effectiveness panel shows two sub panels.

- Recipient Status - Here you can view the total number of recipients for this notification broken down to show how many are GS1 Canada subscribers (Via GS1) and how many are not subscribed to GS1 Canada (Outside GS1). From these totals, you can view how many recipients have acknowledged receipt and how many have not. These numbers are also expressed as a percent of the total

notification recipients.

- Corrective Action Status Totals - This panel shows the total number of recipients who have acknowledged that corrective action is to be taken and the total number who have completed corrective actions. These numbers are also expressed as a percent of the total notification recipients.

In the Effectiveness Report panel, you can view total numbers of base unit products found by Recall subscribers (Via GS1) and by recipients who are not subscribed to a GS1 Canada service (Outside GS1). You can also include a comment.

Notes

When you add a note, you are creating a note thread that can be used by other Recall users or by targeted contacts to help communicate issues around this notification.

To quickly open the Notes page from either Received Notifications or My Company Notifications, click the plus sign (+) next to a notification and click Notes. If there are existing note threads, they appear in a list.

To add a note, click Add New Topic.

Steps:

1. Fill in values in the appropriate fields.

   Optionally you can add an attachment.

2. Click Save.

   A success message appears at the top of the page.

3. The page title shows Note Thread and contains three panels.

   Notification Details – Identification of the notification.

   Note Title – The note appears in a list. You can update or delete an individual note in a note thread.

   Reply – Answer a question or send another type of communication to the originator of the note. Also, you can add an attachment here. When you click Add Reply, the reply appears in the Note Title panel.

4. To return to the Notes page, click Back to Notes.

To view an existing note, click View next to the Note Title. For instructions, see step 3, above.

Report (Status Report)

For a recall notification with status "Live", you can view an activity report for individual recipients who have completed the form in the Recall Notification System.

To open the Status Report page, in My Company Notifications, click the plus sign (+) next to a Live notification and click Report.

Information in the Notification Details panel identifies the recall notification.

The page shows lists of individuals who have acknowledged receipt of this notification. The first list shows recipients who are Recall subscribers. If you are sending notifications to non-subscribers, the second list shows recipients who are not subscribed to Recall.

If either list contains a large number of recipients, to help find a specific recipient you can change the way this list appears:

- To show a smaller number of recipients on the page, in Show entries select a smaller number. Use the Previous and Next buttons to view another page.
- A Search text box appears at the top of the Recipient Name column.
- To find an item using a pattern of characters, in Search type some characters and then click Search.

  Only those items that match the pattern appear in the list.

- A filter appears at the top of the Status column.

  To find an item using a filter, select an option from one of the filter drop-down lists. The list changes to display only those products that match the filter option.

For details of the notification and details of corrective actions taken by a recipient, click the recipient name.

Report Progress

You can perform a number of actions to update progress on a recall notification.

To quickly open this page from Received Notifications, click the plus sign (+) next to a notification and click Report Progress.

There are two main areas on this page:

- Report Progress Area
- Item Status Area

Report Progress Area

You can indicate whether this notification is acknowledged or if actions have been taken to correct the issue in the notification. You can also review a history of corrective actions that your company has taken around this notification.

Information in the Notification Details panel identifies the recall notification.

Steps:

1. In the Notification Corrective Action Status panel, in Corrective Action Status, select a status value.
2. Optionally, in Comment, describe the circumstances around this status.
3. Click Add.

   A line appears in the Notifications Corrective Action Status History panel.

Item Status Area

As the manufacturer or brand owner, you can review a history that shows when a recall notification changed status.

1. In Products Found in Base Units, specify the number of products to be returned.
2. Click Add.

   A line appears in Corrective Item Status History. If you are a Healthcare sub-scriber and if this is a drug product, detailed information shows Lot Number and Expiry Date along with the record of number of products found.

Submit for Approval

Use this if you are initiating a recall notification.

Steps:

1. In the navigation column of a draft notification, click Submit for Approval.

   The Submit Notification for Internal Approval page appears.

2. If all stages of this process are complete, do the following:

   a. In Password, enter your myGS1 login password.

      This confirms that you have authorized the accuracy and correctness of the notification details.

   b. Click Submit for Approval.

      The Notification Information page appears.

      A confirming message appears at the top of the page.

Email messages and Short Message Service (SMS) messages are sent, as configured for individual users.

To return to the list of notifications, click My Company Notifications.

In the list of notifications, the notification status appears as "Submitted for Approval".

Summary Notification PDF

You can generate a PDF document that shows the Summary Notification Details panel.

In the navigation panel, click Summary Notification PDF. The PDF is downloaded to your Downloads folder.

Update

As an Initiator, you can update (or extend) a recall with the status "Live". When you update, you create an extension to the existing recall notification. The updated notification tracks the link between the updated and original recall notification.

To open a notification for update, on My Company Notifications click the plus sign (+) next to a live notification and click Update. The Notification Details page appears.

The notification status changes to "Draft". If you go back to My Company Notifications before you complete the updated details, to complete the update you will open this notification with the Edit button.

Mandatory attributes show a red asterisk (*) next to the attribute label.

Steps:

1. In Reason for Update describe changes to the original notification.
2. Follow steps for creating a recall notification.

   For a description of the steps, see "Initiator Duties" ().

3. After you finish updating the notification, submit it for approval.

Initiator Duties

Creating a Recall Notification requires two user roles: Initiator and Approver. This section describes the steps taken by the Initiator to create and submit a Recall Notification for approval.

Overview of Creating a Recall

For Recall Initiators, creating and submitting a recall notification is presented in a wizard format that verifies your data input so that you don't leave out any important information.

Depending on how you are subscribed to Recall, the stages listed below are similar. Attributes that appear when identifying items reflect the choice of service that you made after you logged in.

After you click Create New Notification, the appropriate names of each wizard stage appear in the left column.

The following is an overview of the wizard stages.

Stage 1: Create Notification Details
Specify the details that will identify this notification and make it distinct from any other notification. For details, see "Stage 1: Create Notification Details" (page 24).

Stage 2: Edit Notification
Identify products, give specific instructions, identify key contacts and all those who should received this notification. For details, see "Stage 2: Edit Notification" (page 24).

Stage 3: Review Notification
Review a snapshot of all notification details, including the status of the notification and number of attachments. You can also review item details and instructions. For details, see "Stage 3: Review Notification" (page 32).

Stage 4: Take Action
Send the recall to an Approver within your organization. The Approver will either reject what has been submitted or send your recall notification live. For details, see "Stage 4: Take Action" (page 32).

You can also generate a PDF copy of notification details or add notes to be included with a submission.

Prerequisites

Before you create a recall notification, you must have the following information:

- If there are multiple products to be recalled, you must have a single category name that is common to all products.
- Risk Classification of the recall.
- Reason for this notice.
- How the product is distributed.
- The product identifier, brand, size and other details about the product.
- Container type, identifier and other container details.
- Tracking code details.
- Where and when the product was distributed.
- Special handling information – if any.
- Name and phone number of the person responsible for product pickup.
- Name and phone number of the person responsible for handling a return credit.
- If you are registered to Recall with Internal Locations Distribution, the name and email address of the contact at each location should be shown by the system.

    For more information about Internal Locations Distribution, see "Initiator and Receiver Company with Internal Locations Distribution" (page 7).

- Name and contact information for the recall company contact and product safety contact.

Stage 1: Create Notification Details

This process starts in the My Company Notifications tab.

Steps:

1. Click Create New Notification.

   The Notification Details page appears. The navigation column to the left shows only the "Create" status and Notification Details.

2. Specify field values as required.

   Required field values are indicated with a red asterisk (*).

   For help with a field value, hover the mouse pointer over a field name. A short description appears.

3. Optionally, in Notification Attachments you can add a product image or a number of attachments.

4. Click Create.

   Verification is performed on all required fields.

   If all required fields contain values, a confirming message appears at the top of the page.

   The Notification Title appears in this format:

   [NotificationType] [ProductType] [RiskClassification] [NotificationName]

   As well, the navigation column to the left shows "Edit" status and shows a list of sub stages that you can complete sequentially or in any order.

   A check mark appears next to Notification Details, indicating that this step is complete.

   The notification has been identified and stored in the system.

5. Optionally, to leave the Notification Details page and exit the process at this point, select My Company Notifications.

   The notification appears in the list of notifications with the status "Draft".

6. To continue with this notification, at the bottom of the Notification Details page, click Next.

Continue with Stage 2: Edit Notification.

Stage 2: Edit Notification

This is a continuation from Stage 1, above.

To open a notification in edit mode, do one of the following:

- Complete Stage 1: Create Notification Details described above and then click Next at the bottom of the page.
- In My Company Notifications, click a notification title with the status "Draft".

The notification title appears at the top of the page, and starts with "You are currently viewing Notification …".

The page shows the Notification Details page with a navigation column on the left. The top of the navigation column shows "Edit".

While you are completing the Edit Notification details, you can click any of the links in the navigation column to review what you have done and revise, if necessary. You can complete the four sub stages in any order. This description follows the order in the navigation column.

This step has multiple sub stages:

- Items
- Instructions
- Contacts
- Translations
- Subscribed Recipients
- Non-Subscribed Recipients
- Upload Recipients

Items

Steps:

1. To identify products associated with this notification, in the navigation column, click Items.

   If there are no items in this notification, the Create Item page appears right away.

   If there are items in this notification, the Items page appears, showing a list of items.

   To add an item, click Add Another Item.

   The Create Item page appears.

2. For the General Merchandise industry sector, as an Initiator, in Incident Report Details, you have the option to retrieve product data from an Incident Report, if an Incident Report exists.

   To do this, in Incident Report ID, specify the Incident Report ID number and click IR Details.

   Details from the Incident Report appear in the Items page.

   You must be aware of the following rules:

- You must be registered to Incident Reporting.

- You can add only from Incident Reports that are owned by you.

- The Incident Report number can be used by the system only once.

- The Incident Report must be confirmed as either an Incident or Not an Incident.

3. In the Item Identifier panel, do one of the following:
   - In GTIN, specify the item GTIN.

     If you are the brand owner of this GTIN, and if this GTIN is loaded into ECCnet Registry, then all product details appear.

   - For Food and Beverage industry sector do one of the following:

     - Foodservice - Specify the Case or Package GTIN.
     - Foodservice and Retail - Specify either the Item GTIN or the Case or Package GTIN.
     - Retail - Specify the Item GTIN.

   - In Item Alternate Identifier you can specify an alternative identifier and leave the GTIN field blank.

     If you specify an alternative identifier, you must indicate value and the type of identifier.

     Note: The descriptive word in front of "Alternate Identifier" indicates the packaging type, for example, Item, Case, etc. "Item" is used here as an example.

4. If product details do not appear, you must include product details in fields marked with a red asterisk (*).

5. Click Save.

   If all required fields contain values, a confirming message appears at the top of the page.

   In the navigation column, a check mark appears next to Items, indicating that at least one item has been added.

   The item appears in a table that shows the product name and identifier.

6. You can perform actions on an item in this table:
   - To edit the item, click Edit and revise item details.

   - To add an item that is similar to an item in the list, click Copy and revise appropriate details.

   - To remove an item from a list, click Delete.

7. Optionally to add another item, click Add Another Item and repeat steps 2 to 5.

8. To move to the next sub stage, click Next.

Instructions

1. To describe handling instructions for products in this notification, in the navigation column click Instructions.

   The Instructions page appears.

   The only required field on this page is in the Reimbursement Instructions panel.

2. In Details, describe to your trading partners how you plan to make adjustments to their account or otherwise reimburse them for returning recalled items.

3. Complete other field values as you see fit.

4. To save details that you have added in this sub stage, click Next.

   If all required fields contain values, a confirming message appears at the top of the page.

   In the navigation column, a check mark appears next to Instructions, indicating that mandatory fields contain a value.

Contacts

A contact is a person in your organization with whom a notification recipient can get in touch for more information.

If your company is correctly registered, the company Recall Coordinator contact information appears here.

After you add the first recipient contact to the notification, a check mark appears in the Navigation column, next to Contacts. You can continue to add recipient contacts to the notification as appropriate.

1. To specify contacts for this notification, in the navigation column click Contacts.

   The Contacts page appears showing details for the company Recall Coordinator.

2. If values are missing for required fields (marked with a red asterisk (*)), add these values.

3. Click Save.

   If all required fields contain values, a confirming message appears at the top of the page.

   In the navigation column, a check mark appears next to Contact, indicating that this sub stage is complete.

   The contact appears in a table that shows Contact Type and Name.

4. To add another contact click Add Another Contact and complete steps 2 and 3.

5. To edit details of a contact, click Edit and make revisions as required.

6. To move to the next sub stage, click Next.

Translations

If it is important to send this recall notification in both English and French, use this feature.

Steps:

1. To create this notification in both English and French, in the Translate Notification page, click Translate.

   The Translations page appears, showing the original value for each label in the notification.

2. To the right of each label, add the translated value.
3. Click Save.

   A confirming message appears.

   In the navigation column, a check mark appears next to Translations, indicating that mandatory fields contain a value.

4. Scroll down to confirm translations.
5. If all translations are correct, click Next.

Translations are complete for this notification.

Subscribed Recipients

Use this feature to manually add notification recipients who are registered to GS1 Canada Recall.

To upload registered and non-registered recipients from a file, see "Upload Recipients" ().

1. To identify receivers registered to Recall who will receive this notification, in the navigation column click Subscribed Recipients.

   The Subscribed Recipients page appears.

2. To add recipients who are registered to Recall, click Add Subscribed Recipients.

   The Add Subscribed Recipients page appears showing Search Results.

   Follow instructions in "Selecting Recipients" below.

3. To add subscribed recipients that include public locations, click Add by Global Search.

   The Add Subscribed Recipients page appears showing Search Results.

   Follow instructions in "Selecting Recipients" below.

   For more information about public locations, see the *ECCnet Locations User Guide* on the ECCnet Locations Help page.

4. To add registered recipients that are contained in groups, do the following:

   a. Click Add by Recipient Group.

     The Select Subscribed Recipient Group page appears, showing a list of groups.

   b. To add all recipients from a group, in Actions, click Add All.

     The Subscribed Recipients page appears showing names of recipients from all selected groups.

   Groups of subscribed recipients are managed in Recall Settings. For more information, see "Recipient Management" ().

5. To distribute this message internally within your company, click Add Internal Recipients.

   The Add Internal Recipients page appears. If you have configured ECCnet Locations to allow internal distribution, a list of internal recipients appears.

   For help with ECCnet Locations, see the *ECCnet Locations User Guide* on the ECCnet Locations Help page.

To continue adding non-subscribed recipients, continue with the next section.

To continue with the New Notification process, read Stage 3: Review Notification.

Selecting Recipients

1. To find a recipient, scroll through the list.
2. To change the number of recipients in the Search Results list, in Show entries, select a different number.
3. To help find a specific recipient, you can change how the list appears:

   - A Search text box appears at the top of the following columns:

     Recipient Name

     GLN

     City

     Postal Code

     To find an item using a pattern of characters, in Search type some characters and then click Search. Only those items that match the pattern appear in the list.

   - A filter appears at the top of the State column.

     To find an item using a filter, select an option from one of the filter drop-down lists. The list changes to display only those products that match the filter option.

4. To select recipients, in Search Results select the check box next to each recipient.
5. At the bottom of the page, click Add To Notification.

The Subscribed Recipients page appears, showing the selected recipients in a list.

A success message appears at the top of the page. As well, in the navigation column, a check mark appears next to Subscribed Recipients, indicating that you have selected at least one recipient.

6. In the Additional Information column, if a selected recipient shows a "Required" link, you must click this link and provide the additional information that is described.

   If a selected recipient shows an "Optional" link, to add more information, click this link and provide the information that is described.

7. To delete a recipient from the list, select the check box next to the recipient name and click Delete.

Non-Subscribed Recipients

Use this feature to manually add notification recipients who are not subscribed to Recall.

The list of non-registered recipients is managed in Recall Settings. For information about managing this list, see "Recipient Management" (page 38).

To upload registered and non-registered recipients from a file, see "Upload Recipients" (page 31).

1. To identify receivers not registered to Recall, in the navigation column click Non-Subscribed Recipients.

   The Non-Subscribed Recipients page appears.

2. Click Add Non-Subscribed Recipients.

   The Non-Subscribed Recipients page appears.

3. To add non-registered recipients from the list in Recipient Management, do the following:

   a. Click Add Existing Recipients.

      The Add Existing Non-Subscribed Recipients page appears.

   b. Select a check box to the left of a company name.

      You can select multiple check boxes.

   c. Click Add Non-Subscribed Recipients.

      The Non-Subscribed Recipients page appears with selected recipients added to a table list.

4. To add a non-registered recipient manually, do the following:

a. Click Add New Recipient.

The Non-Subscribed Recipients page appears, showing a form.

b. To add a single recipient, specify values for the required fields.

c. To add a file as an attachment to only this recipient, click Add Attachment and follow onscreen instructions.

The attached file name appears in a list table.

d. To add this recipient click Save.

A success message appears at the top of the page.

e. To return to the Non-Subscribed Recipients page, click Back to List.

The Non-Subscribed Recipients page appears, showing the added recipient in a list.

6. To delete a recipient from the list, select the check box next to the recipient name and click Delete.

5. To add a file as an attachment for all non-subscribed recipients, do the following:
a. Click Select File and navigate to the file.
b. Click Open.

The file name appears in the file attachment area.

c. To change the file, click Change and browse to a different file.
d. In Description, add a descriptive statement about the file.
e. Click Save.

The file name appears on the Non-Subscribed Recipients page.

f. To delete an attached file in the Non-Subscribed Recipients page, select the check box next to the file and click Delete.

To continue with the New Notification process, read Stage 3: Review Notification.

Upload Recipients

Use this feature to add subscribed or non-subscribed notification recipients from a Comma Separated Values (CSV) file.

1. In the navigation column click Upload Recipients.

The Upload Recipients page appears.

2. To download a sample CSV file, click the Download Sample File link.

A file named SubscribedAndNonSubscriberSample.csv is downloaded into your default Download folder.

3. Use the format in this file to add names of recipients.

For recipients who are registered to Recall, or for distribution to internal locations, enter the company name and GLN.

For recipients who are not registered to Recall, enter the company name, contact name and email address.

4. Save the CSV file.

5. In Recall, in the Upload Recipients panel, click Select File and browse to the CSV file with recipient names.

   The file name appears next to the Select File button.

6. Click Upload File.

   A success message appears.

7. To upload a different file, repeat steps 5 and 6.

After the upload is complete, names of registered recipients appear in the Subscribed Recipients list and names of non-registered recipients appear in the Non-Subscribed Recipients list.

Continue with Stage 3: Review Notification.

Stage 3: Review Notification

This is a continuation from Stages 1 and 2, above.

There are three views that you can use to review details of the notification:

- Notification Snapshot – View identification details, status and creation details.
- Notification Information – View identification details and details around products, instructions and contacts.
- Recipient Information – View the list of subscribed and non-subscribed recipients.

If all data is accurate, proceed with Stage 4: Take Action.

Stage 4: Take Action

This is the final stage taken by the Initiator.

You can perform the following actions:

- Submit for Approval
- Download Initiator PDF (English/French)
- Download Receiver PDF (English/French)
- Notes

For a detailed description of these actions, see "Details of Actions" (page 16).

Receiving a Notification Rejected by Approver

After you have completed notification details, you send it for approval. If your Approver rejects the notification, it will appear in My Company Notifications.

A rejected notification shows a caution icon (⚠). To read the comment from the Approver, hover over the icon. The Approver comment will tell you what you need to change.

You can change field values in the following Edit tabs:

- Notification Details
- Items
- Instructions
- Contacts

For help with making changes in these tabs, see "Stage 2: Edit Notification" ().

After making required changes, in Action, click Submit for Approval. For help with this step, see "Submit for Approval" ().

Check Recall Acknowledgment

After you have sent a recall for approval, an Approver sends the notification live. For a notification with status "Live", you can check the list of subscribed and non-subscribed contacts to see who has read the notification.

To open this report, in My Company Notifications, locate a notification with status "Live". Click the plus sign (+) next to the notification and click Report. For more information on this report, see "Report (Status Report)" ().

To access feedback from targeted contacts, in My Company Notifications, click the plus sign (+) next to a Live notification and click Notes. For more information about Notes, see "Notes" ().

Approver Duties

Creating a Recall Notification requires the Initiator and Approver. Approvers within the organization will be notified by email of any drafted recall submitted for approval. This section describes the steps required to approve a recall notification drafted by an Initiator and to send the recall Live to the targeted trading partners.

Note: As an Approver, you cannot edit a Recall Notification. If an update is required, you must reject the notification and send it back to the Initiator.

For Approvers, reviewing, approving, and sending recall notification Live consists of the following stages:

Stage 1: Review Notification Information

You can approve or reject a notification that is submitted for approval.

Stage 2: Review Recipient Information

You can approve or reject the selected target recipients.

Stage 3: Reject the Notification or Approve it and Send Live

When you approve the notification, you can send the notification Live to all designated targeted trading partners.

Stage 1: Review Notification Information

Steps:

1. When you log in, the My Company Notifications page appears showing a list of notifications.
2. Find a notification with status "Submitted for Approval" and select the notification title.

   The Notification Information page appears.

3. Review the information for accuracy.

If all information is accurate, continue with Stage 2.

If any information needs to be revised, skip ahead to Stage 3.

Stage 2: Review Recipient Information

This is a continuation from Stage 1, above.

You have selected a notification with status "Submitted for Approval". The Notification Information page is open.

Steps:

1. In the navigation column, under Review select Recipient Information.

   The recipient details page appears showing up to three panels, depending on your system configuration:

   ○ Subscribed Recipients

   ○ Non-Subscribed Recipients

   ○ Internal Recipients

2. Review the information for accuracy.

Continue with Stage 3.

Stage 3: Reject the Notification or Approve it and Send Live

This is the final stage performed by the Approver.

The Notification Information page is open and you have reviewed the recipient information.

Steps:

1. In the navigation column, under Action, select Approve or Reject.

    The Approve or Reject page shows two sections: Approve Notification and Reject Notification.

2. To reject the notification, do the following:

    a. In Reject Notification, describe the reason for rejecting the notification.
    b. Click Reject Notification.

    A message appears showing that the notification was rejected.

    In My Company Notifications, the notification appears with status "Draft".

    The notification is returned to the Initiator.

3. To approve the notification, do the following:

    a. In Approve Notification, click Approve.

    The Go Live page appears, showing a success message.
    The bottom of this page describes all the reminder alerts that the system will send in the event that recipients do not take action.

    c. Select the check box next to the correctness statement.
    d. Optionally, you can select a different date and time.
    e. In Password, enter your myGS1 login password.

    This confirms that you are accountable for the accuracy and correctness of the notification details.

    f. Click Go Live.

    A message appears showing that the notification has been distributed.

    Email messages and Short Message Service (SMS) messages are sent, as configured for individual users.

In My Company Notifications, the notification appears with status "Live".

Other Actions That You Can Perform

You can perform other actions on notifications, depending on the notification status.

To view the actions that you can perform on a notification, in My Company Notifications click the plus sign (+) next to the notification title. A series of command buttons appears.

You can perform the following actions:

- Notes – Create or add to a note thread that can be used by other Recall users to help communicate issues around this notification.
- Report – For subscribed recipients, view activity taken on a notification. For non-subscribed recipients, view whether or not they have read the notification.
- Go Live – Send an approved notification Live.
- View – View details of the notification.

For a description of these actions, see "Details of Actions" ().

Appendix 1: Reference Topics

What is a GTIN?

A Global Trade Item Number (GTIN) is a unique product identifier. A GTIN is encoded in a bar code, which is printed on the package of a trade item.

Note: The GTIN verification process is a not a mandatory part of Recall process. For example, if the recalled product is a produce item, or the recalled product does not yet have a GTIN assigned to it, users of Recall can choose to continue the recall process without providing a GTIN by entering PLU number. However, it is strongly recommended to enter a GTIN and perform the GTIN verification process, as it provides assurance as to the accuracy of the data related to the product being recalled.

There are three types of verifications performed by Recall as part of the GTIN verification process:

- The GTIN structure is verified.
- The GTIN is verified as belonging to the consumer item level for Grocery and a case item level for Foodservice.
- The GTIN ownership and existence in ECCnet Registry is verified. (For Grocery/Foodservice only)

Verification 1: The GTIN structure will be verified against the following GS1 GTIN Allocation Rules:

- It is a number.
- It is a number made up of eight, 12, 13, or 14 digits (given the first digit is zero).
- Its check digit is accurate.

Please note that you will not be able to issue a recall for a product that fails the GTIN verification process.

Verification 2: (For Recall Food and Beverage only) It is a requirement that the product for which a recall is being issued is:

- A consumer item if Product Distributed To under Recall snapshot indicates Retail.
- A case if Product Distributed To under Recall snapshot indicates Foodservice.

Verification 3: Only if the sector selected is Food and Beverage, the GTIN verification will verify that there is a match between the user's Company Prefix Licence and the GTIN entered. The user's organization must own the GTIN entered.

This verification will also check if the GTIN entered is loaded to ECCnet Registry. Should the GTIN be loaded to ECCnet Registry, the Product Details stage in the Recall process will automatically populate its product details. A form will then open with the following details retrieved from the user company's ECCnet Registry product catalogue:

- Item Product Name (For Retail Only)
- Item Brand Name (For Retail Only)
- Item Product Size and Size/Unit of Measure (UOM) (For Retail Only)
- Case Product Description (Foodservice Only)
- Case Brand (Foodservice Only)
- Case Size and UOM (Foodservice Only)
- Total Units (Foodservice Only)

Recall Status

Approvers can monitor the status of any recall they are processing. They can also view the status of any Recall Notification that is in the work queue of their company's Recall Initiators.

Status	Description
Draft	Recall notification not submitted yet for approval (In initiator work queue).
Submitted for approval	Recall notification submitted for approval and not approved yet. (In Approver work queue).
Approved	Recall notification approved by Approver. No Go Live date and time are specified by the Approver.
Pending go Live	Recall notification approved and a future Go Live date is specified by the approver.
Live	Recall notification successfully sent to targeted recall receivers.

Note: If a notification is rejected by the Approver, the notification status shows as "Draft" and the notification appears in the Initiator work queue. Initiator is notified by email.

Settings

To open the Settings page, at the top of any page, click Settings.

Here you can configure the following:

- Site Settings
- Service Settings
- Recipient Management

Site Settings

To open the Settings page, at the top of the page, click Settings.

In the left panel, the Site Settings section shows a link for User Settings.

The User Settings page shows the Time Zone field. After you change the Time Zone field and click Save, all reports display the local time indicated here.

Service Settings

To open the Settings page, at the top of the page, click Settings.

Note: If your mobile phone number does not appear here, or if the number is incorrect, contact your company's GS1 Canada Subscription Administrator and have him or her edit your user details.

In the left panel, there are links for Service Settings:

- Alert Email Settings
- Mock Notification Email Alerts
- Alert SMS Settings
- Mock SMS Notification Alerts

   Notification actions appear in a list. To receive an email or a text message when an action happens, select the check box next to that action. To stop receiving an email or a text message when an action happens, clear the check box next to that action.

To save configuration changes that you have made, click Save. A success message appears.

Recipient Management

Use Recipient Management to manage groups of subscribed recipients and manage a list of non-subscribed recipients.

Manage recipients in these categories:

- Subscribed Recipients
- Non-Subscribed Recipients

Subscribed Recipients

To open the Subscribed Recipient Group Management page, in Settings, click Subscribed Recipients.

You can re-use groups of recipients instead of manually creating a commonly used group for each notification.

After you have created groups of subscribed recipients, the list of groups appears on this page.

To manage groups of subscribed recipients on this page, you can:

- Create a group
- View and remove individual recipients in a group
- Add recipients to a group
- Delete a group.

Create a Group

1. Click Create New Group.

   The Create Subscribed Recipient Group page appears.

2. In Group Name, type a descriptive name for this group.
3. In Description, describe this group further.
4. Click Create Group.

   The Add Group Recipients page appears showing a table list of subscribed recipients.

   A success message appears at the top of the page.

5. To help find specific recipients, you can change how the list appears:
   - At the top of the list, in Show, specify more or fewer recipients in a single page.

   - If you have multiple pages of recipients, at the bottom of the list, use Next and Previous to navigate through the pages.

   - To use a filter and display recipients with a common attribute, use the Search field under Location, Member, GLN or City.

     To use a filter, you must type at least three characters.

    ◦ To filter the display by province, in the State field, select a province.

6. To select a recipient to be added to this group, select the check box to the left of the Location column.

   To see more details about a subscribed recipient, hover your mouse pointer over the Location value.

   You can select multiple recipients.

7. To select all recipients on the current page, select the check box in the header.

8. After you have selected recipients for this group, at the bottom of the page, click Add to Group.

   The Subscribed Recipient Group Management page appears with a success message at the top of the page.

You have created a group.

View and remove individual recipients in a group

1. Locate a group and, in the Actions column, click View.

   The View Group Recipients page appears, showing a list of group members.

2. To select a group member for removal, select the check box to the left of the Location column.

   To see more details about a recipient in this group, hover your mouse pointer over the Location value.

   You can select multiple recipients.

3. Click Delete from Group.

   Note: You cannot undo the Delete action.

   A confirming message appears.

4. Click Yes.

The subscriber is removed.

Add Recipients to a Group

1. Locate a group and, in the Actions column, click Add.

   The Add Group Recipients page appears showing a table list of subscribed recipients.

2. To help find specific recipients, you can change how the list appears:
   ◦ At the top of the list, in Show, specify more or fewer recipients in a single page.

   ◦ If you have multiple pages of recipients, at the bottom of the list, use Next and Previous to navigate through the pages.

○ To use a filter and display recipients with a common attribute, use the Search field under Location, Member, GLN or City.

To use a filter, you must type at least three characters.

○ To filter the display by province, in the State field, select a province.

3. To select a recipient to be added to this group, select the check box to the left of the Location column.

To see more details about a subscribed recipient, hover your mouse pointer over the Location value.

You can select multiple recipients.

4. To select all recipients on the current page, select the check box in the header.

5. After you have selected recipients for this group, at the bottom of the page, click Add to Group.

The Subscribed Recipient Group Management page appears with a success message at the top of the page.

Recipients have been added.

Delete a Group

1. Locate a group and, in the Actions column, click Delete.

Note: You cannot undo this action.

A confirming message appears.

2. Click Yes.

A success message appears.

The group is deleted.

Non-Subscribed Recipients

To open the Non-Subscribed Recipient Management page, in Settings, click Non-Subscribed Recipients.

This page shows a list of non-subscribed companies that you want to be able to send recall notifications.

With this feature you can:

■ Add a Non-Subscribed Recipient
■ Add Non-Subscribed Recipients from a File
■ Export the list of Non-Subscribed Recipients
■ Delete Non-Subscribed Recipients from the List

Add a Non-Subscribed Recipient

1. In the Non-Subscribed Recipient Management page, click Add Non-Subscribed Recipient.

   The Non-Subscribed Recipients page appears, showing a blank form.

2. Complete the form with the recipient details.

3. Click Save.

   The Non-Subscribed Recipient Management page appears showing a success message at the top of the page.

   The recipient appears in the list.

You have added a non-subscribed recipient.

Add Non-Subscribed Recipients from a File

1. In the Non-Subscribed Recipient Management page, click Add by Upload.

   The Upload Non-Subscribed Recipients page appears.

2. If you don't have a formatted CSV file, in Sample File, click Download Sample File and add recipient information.

3. In Upload File, click Select File and navigate to the CSV file.

   After you select a file, the file name appears to the right.

4. Click Upload File.

   The Non-Subscribed Recipient Management page appears showing a success message at the top of the page.

   Added recipients appear in the list.

You have added non-subscribed recipients from a file.

Export the list of Non-Subscribed Recipients

1. In the Non-Subscribed Recipient Management page, click Export Recipients.

   A CSV file is downloaded to your default Download folder.

2. Use Microsoft Excel or another tool to open the downloaded file.

You have completed the export action.

Delete Non-Subscribed Recipients from the List

Note: You cannot undo this action.

1. In the Non-Subscribed Recipient Management page, select a check box to the left of the Company Name column.

   You can select multiple check boxes.

2. Click Delete.

   A confirming message appears.

3. Click Yes.

The selected companies are removed from the list.

GS1 Canada

Toronto Office
1500 Don Mills Road, #800
Toronto, ON M3B 3K4
📞 +1.416.510.8039
🖨 +1.416.510.1916
@ info@gs1ca.org

Helpdesk 1.800.567.7084

Montreal Office
9200 Boulevard du Golf,
Montréal, QC H1J 3A1
📞 +1.514.355.8929
🖨 +1.514.356.3235
@ images@gs1ca.org