GS1 US Data Hub | Location
Self-Managed Checklist

March 29th, 2024

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About this Checklist

This checklist discusses GS1 US Data Hub | Location functionality for newly "self-managed" companies as part of the GS1 US Managed GLN subscription. These are the first steps to review before using the **GS1 US Data Hub | Location User Guide for Managed GLN Subscribers.**

General Questions about Self-Managed companies:

Q What is the difference between using my Group Purchasing Organization (GPO) and self-managing my account?

A When your company is in a contract with a GPO, the GPO creates, manages, and deletes your users, locations, and Global Location Numbers (GLN). The responsibility falls on the GPO to gather and input information correctly to utilize for different purposes such as Electronic Data Interchange (EDI).

When your company becomes self-managed, the responsibility falls on you to gather and input information correctly to utilize for the different purposes such as Electronic Data Interchange (EDI).

For example, if a GPO provides purchasing services for a network of health care providers such as a hospital system with multiple campuses that have independent pharmacies, the GPO is responsible to make sure each of the appropriate locations have the correct Location Data & GLN. If one of the hospitals became self-managed, that hospital would be responsible for its pharmacy to have the correct location data and GLN.

Q Why do I want to self-manage?

A The benefits of becoming a self managed account include being able to instill trust in your trading partners that your hierarchy is accurate and up to date in a timely manner. As the entity in the best position to know how you should be viewed by your trading partners, being responsible and in control of your GLN assignment and maintenance allows for changes to be made and shared in real time by you - without any delay created by GPO approvals or actions. Managed GS1 US Data Hub Users require approval from their GPO to make edits to their location data. Self-Managed users can seek assistance from their GPO or from GS1 US in managing their locations as they take on ownership of their hierarchy.

Q How difficult is this? If I need help, who do I call?

A First, starting points are outlined in this guide. Second, you can contact GS1 US Member Support. Third, contact the Manager of Healthcare for GS1 US Healthcare team. The email address is: ghealthcareus@gs1us.org

Q What is the cost involved?

A There is no cost incurred by the self-managed user.

GS1 US Data Hub | Location is sponsored by the GPO.

General Questions about Self-Managed Companies *(Continued)*

Q **What if self-manage is not right for me? Can I go back to GPO managed?**

A You thought this was a really good idea and now you realize it's not going to work for you. You would need to get permission from your sponsoring GPO to switch back. Once approved from the GPO, GS1 US can transfer back the information to the GPO account.

Your hierarchy goes back under the GPO hierarchy, and the logging of your account then is handled again via the GPO.

Q **How do I get started?**

A Submit the Request to Set Up Self-Managed Provider in GS1 US Data Hub Location form.

Upon completion of the GLN transfer within GS1 US Data Hub, you will receive an email with additional instructions.

Q **Who is eligible to be self-managed?**

A Managing entities differ in how they transition their members to self-managed.

Contact your Managing entity to discuss your options.

Visit the Administration Section to Configure Your Industry

Before you get started in the Location section, visit the Administration section of GS1 US Data Hub to configure your Industry for "Healthcare" and related Supply Chain Roles. Once these items are configured, you will see the appropriate options when you are adding a location. Visit the GS1 US Data Hub Administration User Guide for more details.

General Questions about Self-Managed Companies *(Continued)*

Q. I am self-managed, now what?

A. For the administrator of the self-managed account:

❑ First, you will receive an email indicating you have a GS1 US Data Hub account. You can now login to GS1 US Data Hub. You will receive the General User Administrator and Location Administration roles. You can now add your local users to the new account and grant them appropriate roles in GS1 US Data Hub | Location. If a user is going to create and maintain locations and parties, you should assign the "Location Create/Manage" role.

❑ For Managed GLN Subscribers (MGS): Encourage your newly configured local users to set their passwords and to log into GS1 US Data Hub | Location as soon as possible - but at least within seven days: https://dh.gs1us.org/

❑ New Self-Managed GLN Subscribers (SMS) users will need to log into GS1 US Data Hub the first time for their names to display as available users who can be assigned to specific GLN records.

❑ Second, as a SMS, you can choose to turn on the Location Approval Process in GS1 US Data Hub. This process provides a workflow in which users with the "Edit" role submit new and updated locations so that users with the "Approve" role can review and approve. View the Location Approval Process article in the GS1 US Data Hub Help Center to enable this option and assign roles.

❑ Third, as a "new company", you must decide if you want to change the default location "share" settings, which is to share data with all GS1 US Data Hub | Location View/Use subscribers. To change this setting, visit the Administration section and click **Manage** under Share Settings. You may have share settings already defined for Top Level GLN. Click Location from the navigation bar. Click your Top Level GLN to display the "Location Detail Page."

Click the **Sharing tab** and then the **Add New** button. When asked "Who do you wish to share with?", select the option "All GS1 US Data Hub | Location subscribers", then select the box for "Include all current and future descendant locations." Click **Add New**. From this point forward, both **Active** or **Inactive** GLN Types will display when GS1 US Data Hub Location View/Use subscribers search for your GLNs.

General Questions about Self-Managed Companies *(Continued)*

❑ Fourth, once your local users have logged into GS1 US Data Hub | Location for the first time, you can add those users to specific locations (GLNs) in your hierarchy so they can manage specific locations or "branches" in the hierarchy. The user assignments that were previously made for your locations are still in place, but you may wish to change those users now that you are self-managed. To change which users are assigned to specific GLNs, or to branches of your hierarchy:

Q **How do I assign users in my new independent hierarchy?** A Everything else about how you use GS1 US Data Hub | Location works exactly the same as it did before. For more information, please visit the GS1 US Data Hub | Location User Guide for Managed GLN Subscribers.	Q **What roles are assigned to an admin once the GPO initially moves the company over to self-managed?** A Existing users will inherit everything they previously had. If they are new users, they would receive all Location roles including Admin and General User Administrator (GUA).
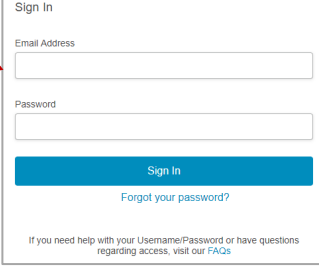
View an instructional module of the self-managed checklist steps.
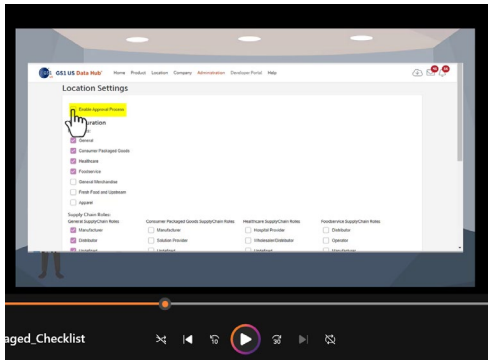
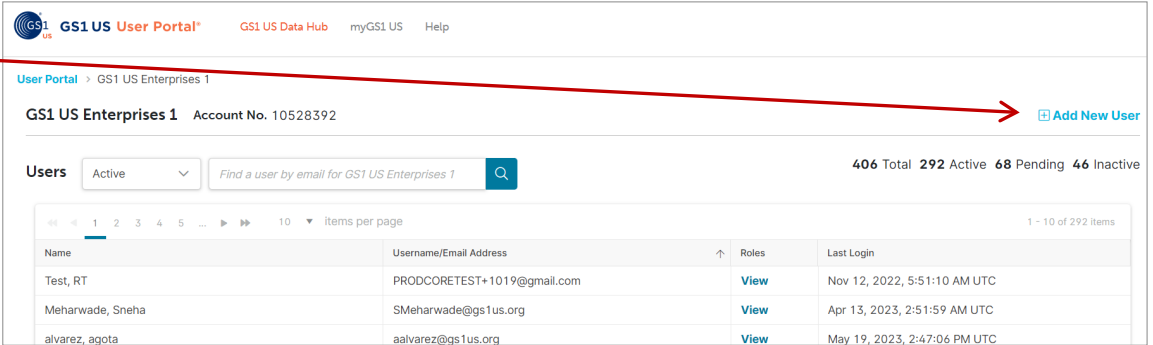# General User Administrator - Add a New User and Assign Roles

START

1. Log in to the GS1 US User Portal (**https://userportal.gs1us.org**).

2. From the home page for your company, click **+ Add New User**.

3. Enter user's email address. This will perform a check to see if it is already active.

4. Click **Next**.

CONTINUE

5a If the user exists, an error message displays. Click the **View Profile** link to view the user's existing profile.

5b If the user does not exist, enter/confirm the email address and enter first/last name.

6 Assign the "Location Create/Manage" or "Location View/Use" user role by selecting the box to the left of the desired user role. Unselecting removes an assigned role. Click the ⓘ to view role details.

Optional: Click **View Users with this Role** to view other users that have this role assigned.

Role Columns Defined

Total Available: the maximum number of times a role can be assigned based on your subscription.

Remaining: the number of times that a role can still be assigned in your company.

Assigned: the number of times the role has been assigned in your company.

7 Click **Add User** to save the user details and to send the registration email to the user's email which allows them to set up their password.

Approve or Reject Changes to a Location

If you have established a GLN operational team to approve or reject GLN data, you can take these actions:

1) **Enable the Approval Process in GS1 US Data Hub.**
   - Click the **Administration** tab, then click **Location - General Settings**.

   - Select the box for **Enable Approval Process**, then click **Save**. You will now see specific "Approval" fields within the Location section of GS1 US Data Hub.

2) **Add users via the GS1 US User Portal.**
   See page 7 for steps on how to add users.

3) **Visit Administration section, Manage User Roles, then select the User to assign Location roles. For example:**

   Edit: Create and update location information.

   Import: Import location information to GS1 US Data Hub | Location.

   Approval Import: **Import locations as approved** checkbox allows the uploader to approve the import template without the need to review under the Pending Approvals tab. This is useful if your company has a separate Approver role, and you don't want that person's mailbox to receive an approval request for each location you are importing.

   Approve: The Approver accepts, rejects or cancels requests from the Editors.

Location Settings

☑ Enable Approval Process

☑ Display Company Information and Allow Access Requests for Locations Not Shared

Configuration
Industries:

☑ General
☑ Consumer Packaged Goods
☑ Healthcare
☑ Foodservice
☐ General Merchandise
☐ Fresh Food and Upstream
☐ Apparel

Supply Chain Roles:

General SupplyChain Roles	Consumer Packaged Goods SupplyChain Roles
☐ Manufacturer	☐ Manufacturer
☐ Distributor	☐ Solution Provider
☐ Undefined	☐ Undefined
☐ Solution Provider	☐ Distributor

GS1 US Data Hub®   Home Product Location Company Reports Administration Developer Portal Help

Administration ⓘ
System Settings

Security
Manage user role assignments.
Manage User Roles

General Settings
Manage company settings.
Manage
- Umbrella Accounts
- Global Licenses
- GDSN
- Messaging

✕ **Import Locations**

Select a completed import template file to upload

Drag & Drop or Browse Files

Import Locations

☐ Import locations as approved

Approve or Reject Changes to a Location (*Continued*)

After you have selected the box for **Enable Approval Process** in the **Administration** section, you can assign the "Approve" role. First, visit GS1 US User Portal, create the user, and assign the "Location Create/Manage" role to this user. Then return to GS1 US Data Hub and click the **Administration** tab and **System Settings – Manage**. Locate the desired user and select the **Approve** box for this user. Now the "Approver" can take these actions:

START

1 Click the symbol on the top right-hand side of the GS1 US Data Hub screen. This icon shows how many approvals are pending. Approvers can click the symbol to open the **Pending Approvals** screen.

Alternatively, you can click the **Pending Approvals** tab from the Manage Locations page. If you view a specific location, the "Location Changes Pending Approval" message displays at the top of the screen.
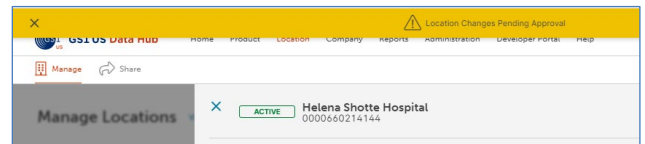
2 Select the box for the location(s) you want to approve. Alternatively, you can click an individual **GLN** to view the Location Detail Record.

3 To accept these changes, click the **Approve** button, then click **Continue**. The location will no longer be displayed in the **Pending Approvals** screen, and displays as **Active**. You can also reject these changes: click the **Reject** button. You must then provide a comment. The Editor can view the location and click the **Revert to live version** button or continue to make changes and submit for approval again.

Approve or Reject Changes to a Location (*Continued*)

If the approver selected the "Approval Notice" notification email in his/her user profile, an email is also sent to the approver from noreply@gs1us.org, notifying them of the change.
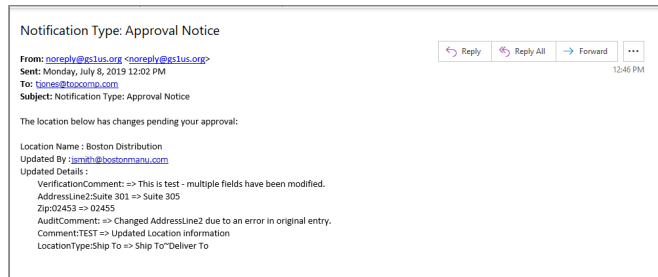
You can view a location's **Approval History** by following these steps:

1. From the menu bar, click **Location**.

2. From the My Locations page, click the "Location Name" hyperlink in the data table.

3. Click the **Approval History** tab. You will see the history which includes approvals, rejections, and cancellations.

GLN: 0870000362756

ⓘ The hierarchy of this location is not shared or there are no children to display

| Details | Hierarchy | Assigned Users | Sharing | History | Approval History |

Changed Created	Created By	Last Updated By	Pending Approval	Approval Complete	Active Approval Request	Comment
2023-06-22	lalvarado@gs1us.org	lalvarado@gs1us.org	No	Yes	No	
2023-06-22	lalvarado@gs1us.org	lalvarado@gs1us.org	No	Yes	No	
2023-06-23	lalvarado@gs1us.org	lalvarado@gs1us.org	Yes	No	Yes	

| 20 ⌄ | Location Approval History per page | « ‹ **1** › » | 1 - 3 of 3 Location Approval History |

Share a Location with Third Parties

By default, when you publish a GLN, it is shared with all GS1 US Data Hub Location View/Use subscribers. In addition, this GLN data is shared with the GS1 Registry Platform, so it can be viewed openly and globally by global retailers, logistics partners, business owners, supply chain managers, and more.

Through the GS1 Database on the GS1 US website, users can query this global registry of GS1 identification numbers, and search by product, look up location/party details, verify company information, and validate their data against a global platform.
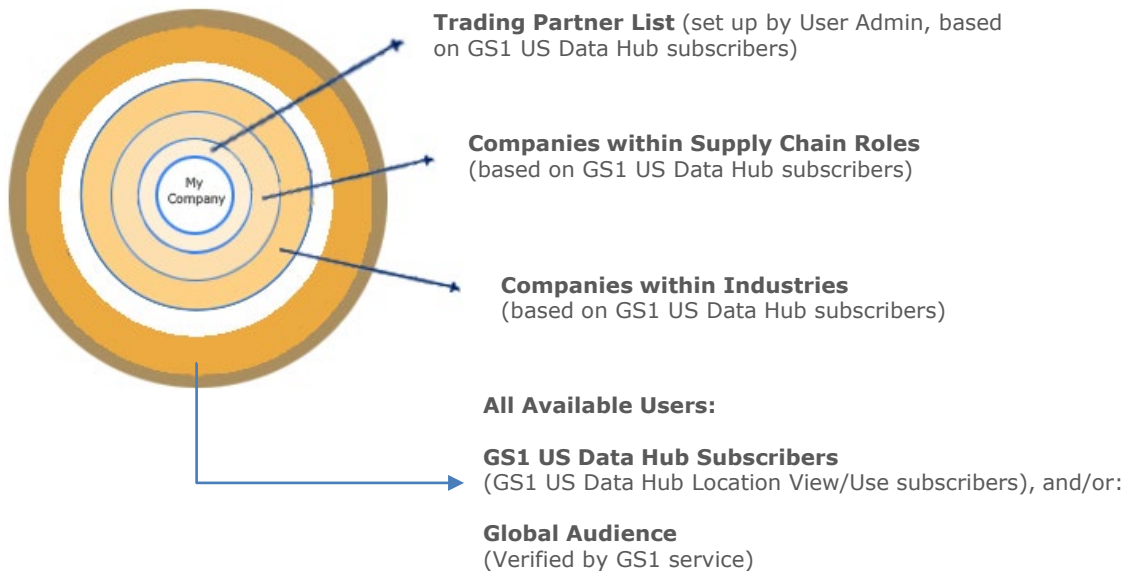
You can also turn off the default share settings. You can then decide to share select GLN records with one or more trading partners. The **Share** feature enables you to build "Circles of Trust" – which can be sub-groups of Location View/Use subscribers:
1) Trading partners of the subscribing company,
2) Companies that share a role in the supply chain, or
3) Companies that operate in a particular industry.

This audience will have the ability to view – and download – GLNs and associated data.

Circles of Trust for GS1 US Data Hub

My Company

Trading Partner List (set up by User Admin, based on GS1 US Data Hub subscribers)

Companies within Supply Chain Roles (based on GS1 US Data Hub subscribers)

Companies within Industries (based on GS1 US Data Hub subscribers)

All Available Users:

GS1 US Data Hub Subscribers (GS1 US Data Hub Location View/Use subscribers), and/or:

Global Audience (Verified by GS1 service)

You can choose to share single locations or entire branches of your hierarchy. You can then choose which trading partners or Location View/Use subscribers can view these GLNs.

For example, you can use the **Share** tab from the main Locations page to view all the available GS1 US Data Hub Location View/Use subscribers that are referenced in the different Circles of Trust.

Sharing with Trading Partners

By default, a published GLN is shared with all Location View/Use subscribers. Your Location Administrators can set up a list of GS1 US Data Hub | Location View/Use subscribers that you identify as your Trading Partners. This option lets you share location information with that list without having to specify these companies each time you share with this list.

What does the location data we share look like to a GS1 US Data Hub subscriber with View/Use access?

When a GS1 US Data Hub View/Use subscriber searches for and finds your locations, they see similar location data as what you as a Create/Manage user can see.

Location View/Use subscribers can only see data for locations that you have agreed to share, and then, only for **Published** locations (they do not see **Draft** locations). The location owner must selectively / explicitly share that location with the view/use subscriber:

1. Click the **Sharing** tab at the GLN record level and choose the trading partner, industry, supply chain or all GS1 US view/use subscribers with which you want to share.
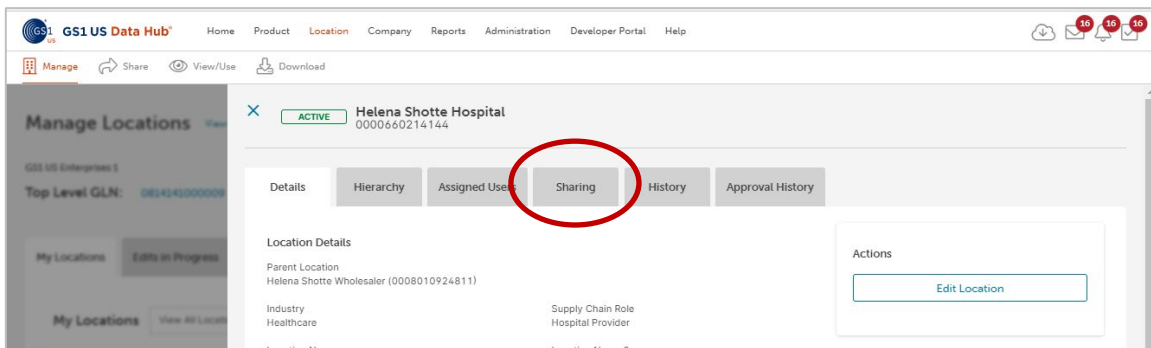
2. The Location View/Use subscribers you are sharing with will see all of the data fields for your location that you've shared. However, they will NOT see any information about how the published location data was created, or who in your organization created or edited that information.

3. For Locations you have NOT shared, a Location View/Use subscriber can "Request Access" to your Location Administrator via GS1 US Data Hub. You can decide to respond or not respond to this this share request.

> Q **How can I stop sharing my location with companies?**
> A To stop your company from displaying to Location View/Use subscribers when they search for "Locations Not Shared", your Location Administrator must uncheck the box for **Display Company Information and Allow Access Requests for Locations Not Shared**. This is available via the **Administration > Share Settings** section.

Understanding the Share Page *(Continued)*

For non-Administrator roles: Use **Share** to view which GS1 US Data Hub subscribers can have access to your selected GLN data.

START

4 Based on your selection, the appropriate locations display. In the above example, All Companies in Supply Chain Role were selected. Click the Supply Chain roles that apply.

Note: if you select Trading Partner list, these fields display for locations identified as Trading Partners by your General User Administrator:

Company Name: Names of the subscriber companies within GS1 US Data Hub with whom you can chose to share this location information.

City: City of the listed trading partner.

State: State of the listed trading partner.

5 Click the **Add New** button. You will now share this location with the companies you've selected.

STOP

Understanding the Share Page

For non-Admin roles: Use **Share** to view which GS1 US Data Hub subscribers can have access to your selected GLN data.
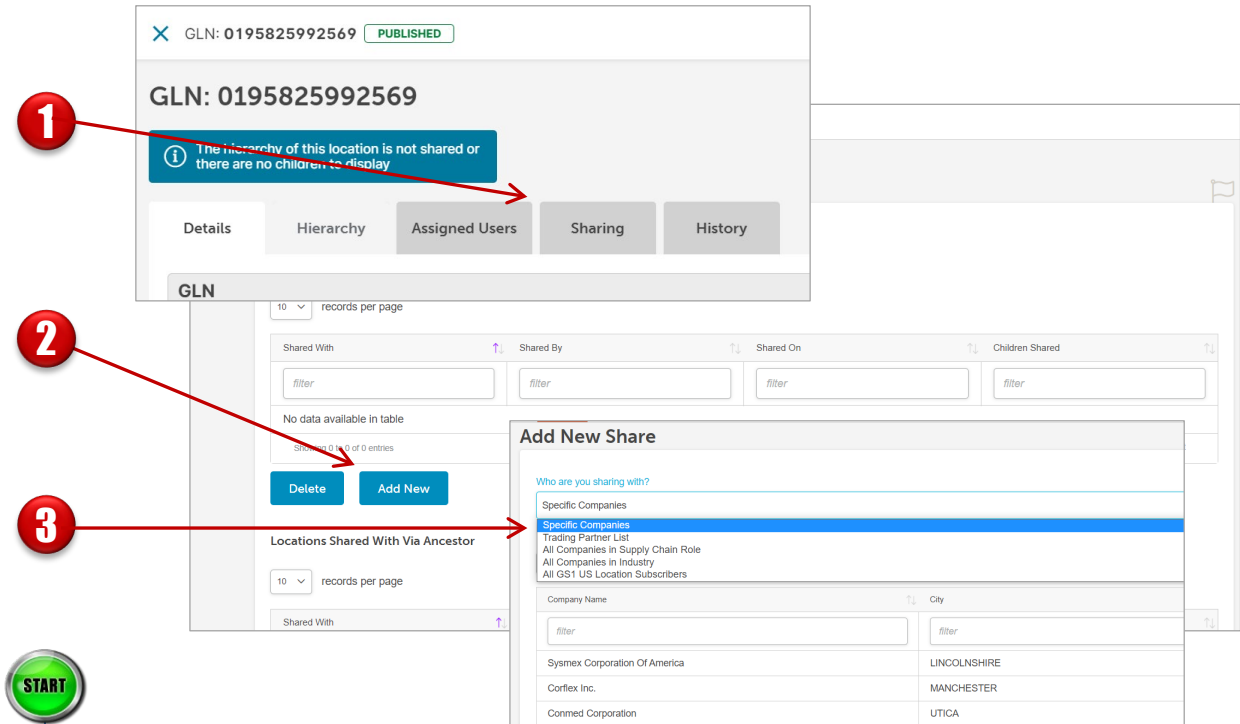
Click **Location**, then click the location you want to share to view the Location Detail Record. Click **Sharing**.

Click the **Add New** button. The **Add New Share** window displays. You can trade with **Specific Companies**. You also have these sharing options:

From the **Who are you sharing with?** drop-down, select one of these options:

Trading Partners – View a dynamic list of GS1 US Data Hub subscribers that your GS1 US Data Hub Location Administrator has identified as businesses with which you want to share location information.

Companies within Supply Chain Roles – These are other GS1 US Data Hub subscribers, based on their supply chain roles, with which you may choose to share your location data.

Companies within Industries – These are GS1 US Data Hub subscribers, based on their industry, with which you may choose to share your location data.

All GS1 US Data Hub Subscribers – Click to view a dynamic list showing all GS1 US Data Hub Location View/Use subscribers at that moment. This list could change regularly. You may wish to share your location information with these subscribers.

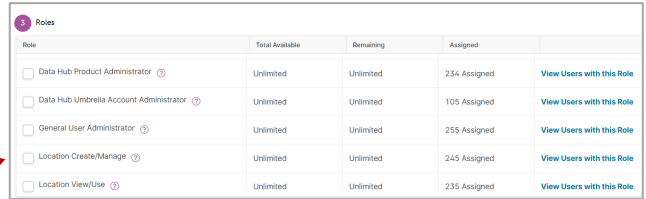## Assign New Users to / Remove Users from a Location

To assign a new user to modify a specific location (including related "child" locations, if available), follow these steps:

1. Visit the **User Portal** to add this user to this organization. When assigning roles, you should **ONLY** select the box for "Location Create/Manage". Then click **Save**. View the User Portal User Guide for more details.

2. You can now visit GS1 US Data Hub. Click the **Administration** link from the main navigation bar. Identify the desired user and click the username. Click the **Manage User Roles** link under **Security**. The Security screen displays all users. Filter by the desired username, if needed, then click the username. The User Detail screen displays.
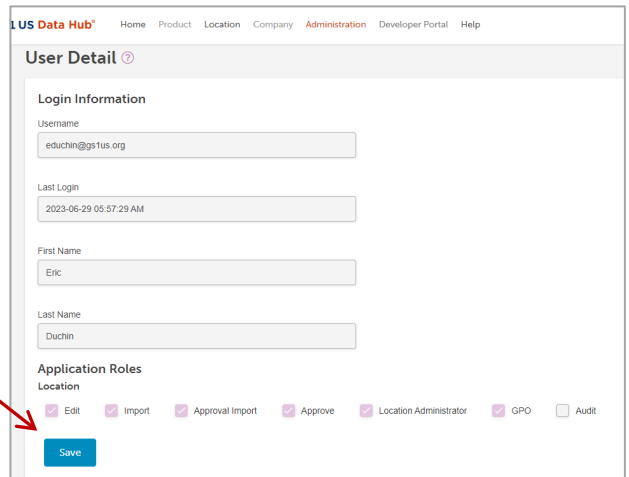
   The Application Roles displayed serve as "secondary" roles that further define actions that a user can perform. Select the box(es) for the desired role(s) for this user, then click **Save**.

Note: If adding a user only to a specific GLN (and its descendants), the user must select the GLN from **My Locations**, navigate **to Assigned Users**, and then assign the relevant user there.

3. The user is added to this specific Location and can perform the "Application Roles" that you assigned. In addition, the user is assigned to any "child" locations associated with this "parent" location.

Note: If you assign either the **Approval Import** or **Approve Application** Role, you must first enable the Location Approval Process. For more details, see the "Approve or Reject a Location" section of this user guide.