GS1 US Data Hub | Location
Self-Managed Checklist

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# Table of Contents

- About this Checklist ................................................................. 03
- General Questions about Self-Managed Companies ....................... 03
- General User Administrator - Add a New User and Assign Roles .......... 07
- Approve or Reject Changes to a Location ..................................... 10
- Share a Location with Third Parties .......................................... 13
- Understanding the Share Page .................................................. 15
- Assign New Users To/ Remove Users from a Location .................... 17
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 The starting points should be the bottom half of this guide. Second, GS1 US Member Support. Third, Manager of Healthcare for GS1 US Healthcare team. Email address: 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 **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.

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.

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.
Q. I am self-managed, now what?

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

- First, you will receive an e-mail indicating you have a GS1 US Data Hub account. You can now login to GS1 US Data Hub. You will receive both the Admin and General User Administrator 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 creating and maintaining locations, you should assign the “Location Create/Manage” role.

  See pages 7-9 to learn how to add users

- 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/](https://dh.gs1us.org/)

- New Self-Managed GLN Subscribers (SMS) users will need to have logged into GS1 US Data Hub the first time for their names to appear in the list of available users to assign to specific GLN records.

- Second, as a SMS, you have a choice as to whether or not you wish to use the approval process in your own organization. This will allow you to designate users on your team as “Editors” and “Approvers”. To set that option, log into GS1 US Data Hub, and in the “Administration screen”, navigate to “Location: General Settings”, and click the word Select. From the “Location Settings page”, click the option to Enable Approval Process.

  See pages 10-12 to learn how to approve/reject location changes

- Third, as a “new company”, you’ll also need to indicate if you want to share your location data with GS1 US Data Hub | Location View/Use subscribers. To do this, visit GS1 US Data Hub | Location, and view the “Manage Locations” page. Click your top level GLN, bringing you to the “Location Detail Page” for that GLN.

  Once on the “Location Detail Page” for your Top Level GLN, 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, all GLN information that is Active or Inactive displays when GS1 US Data Hub Location View/Use subscribers search for your GLNs.

  See pages 13-16 to learn how to share locations
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 if you wish them to manage specific locations or “branches” in your self-managed 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:

See page 17 to add a user to a specific location

**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).
General User Administrator - Add a New User and Assign Roles

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

If the user does not exist, enter/confirm the email address and enter first/last name.
General User Administrator - Add a New User and Assign Roles (Continued)

Assign the “Location Create/Manage” or “Location View/Use” user role (for View/Use subscriptions only) by selecting the box to the left of the desired user role. Unselecting removes an assigned role. Click the i 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.

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.
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:

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. Click the symbol to open the Pending Approvals screen.

2. 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.

3. Select the box for the location(s) you want to approve. Alternatively, you can click the Location Name to view the Location Detail Record.

4. Click the Edit Location button. 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 then view the location and click the Revert to live version button or continue to make changes and submit for approval again.
If the approver selected the "Approval Notice" notification e-mail in his/her user profile, an e-mail 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.
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, the GLN is shared with all GS1 global members via the GS1 Global Registry Platform.

In this GS1 US Data Hub, you can narrow the audience that can view – and download – your GLNs and associated data. 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. Alternatively, you can always share again with all View/Use subscribers, and with GS1 members around the world.

You can make choices about locations in different points in the application. You can choose to share single locations or entire branches of your hierarchy, and choose which trading partners or subscribers you share these locations with. You can change how any or all of your location information is shared at any time.

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. You may choose to share your location data with them. From the Sharing tab you are choosing for a particular location which other subscribers can view or use information about that location.
Share a Location with Third Parties (Continued)

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 unselect the box for Display Company Information and Allow Access Requests for Locations Not Shared. This is available via the Administration > Location > General 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.

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.

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

1. Click Location, then click the location you want to share to view the Location Detail Record. Click Sharing

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

3. 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 Location Create/Manage 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 approval process. For more details, see the “Approve or Reject a Location” section of this user guide.