GS1 US Data Hub | Location

Self-Managed Checklist

September 9th, 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 **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.

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.

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/

- ❑ 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.

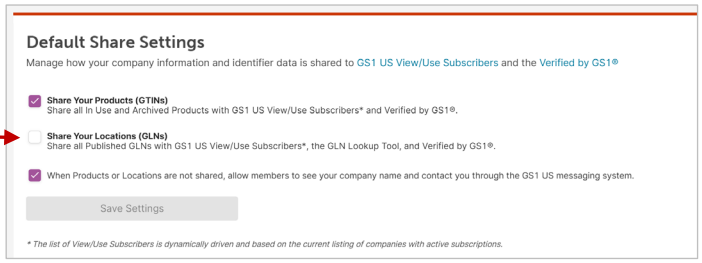
- ❑ Second, as a SMS, you can choose to turn on the Location Approval Process in GS1 US Data Hub. This process provides a workflow in which users with the "Edit" user permission can submit new and updated locations so that users with the "Approve" user permission can review and approve. View the Location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

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

- ❑ 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 and with users via the GLN Lookup Tool.

Share with Select Trading Partners:

Click the **Administration** link, then the **Default Share Settings** link. Uncheck the **Share Your Locations (GLNs)** box. You will no longer be sharing all your GLNs, and can now share specific GLNs with trading partners.



See pages 13-14 to learn how to share locations

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:

See page 15 to add a user to a specific location

Q **How do I assign users in my new independent hierarchy?**

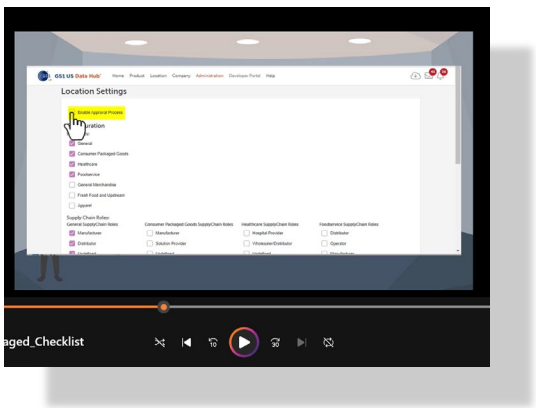
A Everything else about how you use GS1 US Data Hub | Location works exactly the same as it did before.

For more information, please visit the GS1 US Data Hub | Location User Guide for Managed GLN Subscribers.

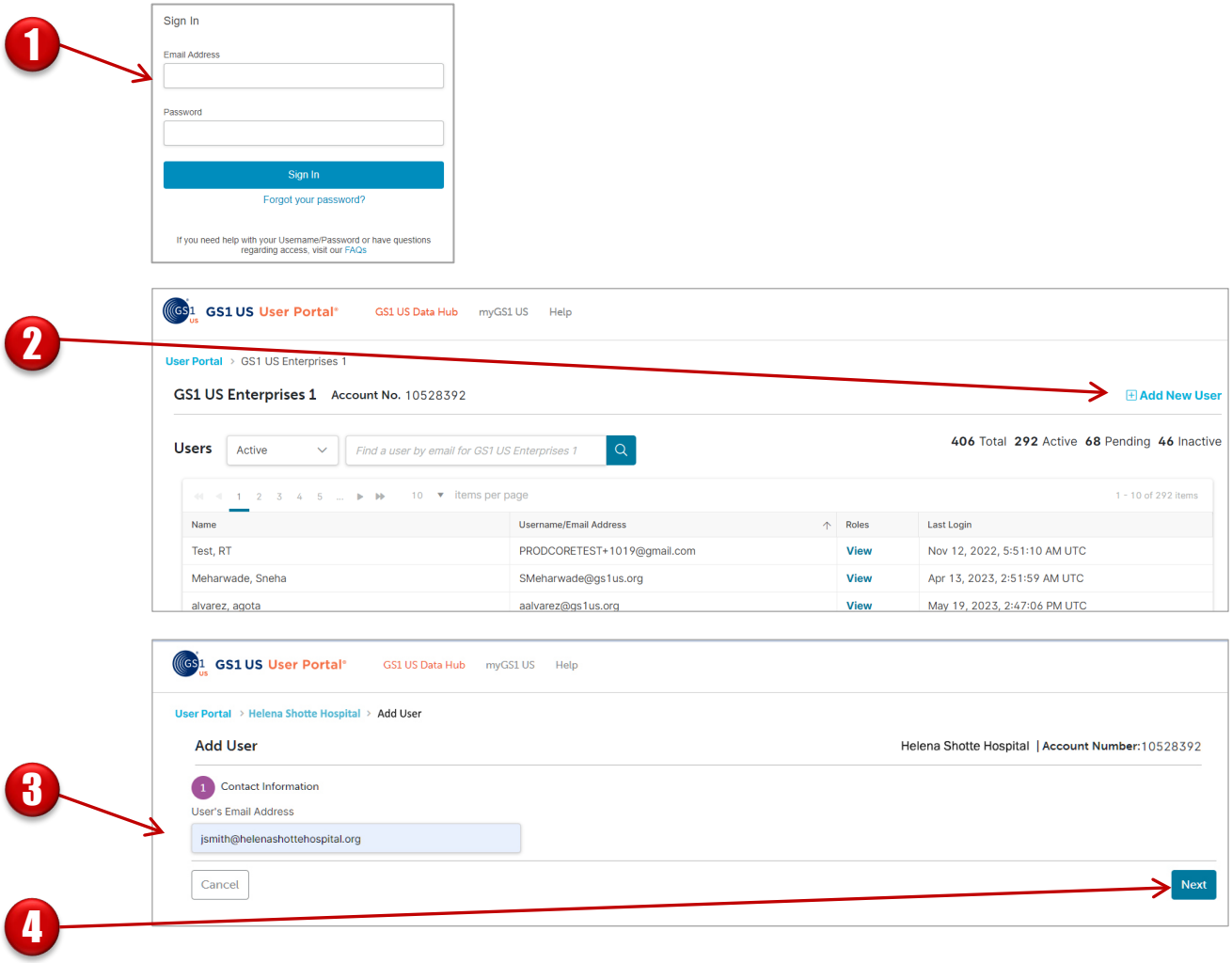
Q **What roles are assigned to an admin once the GPO initially moves the company over to self-managed?**

A Existing users will inherit everything they previously had. If they are new users, they would receive all Location roles including Location Administrator 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

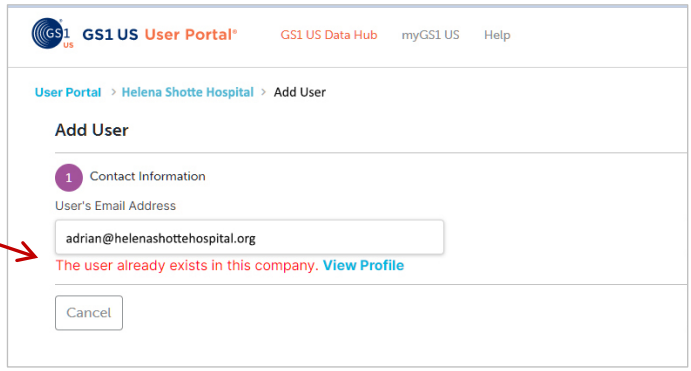


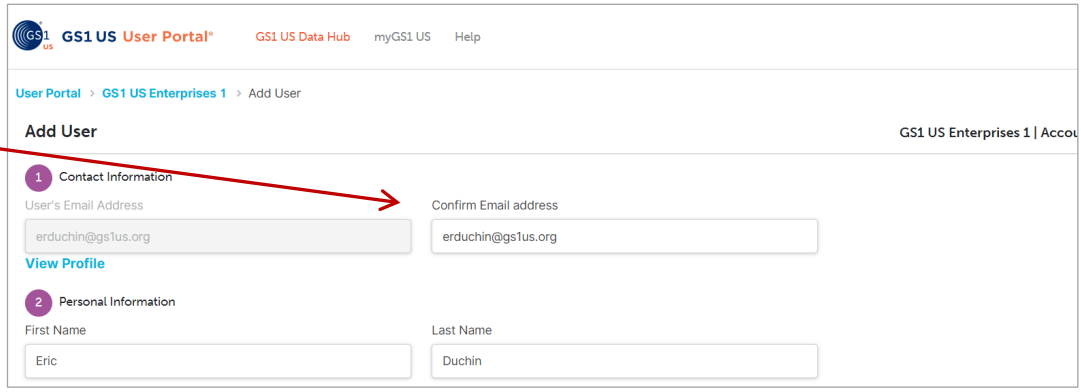
START

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

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





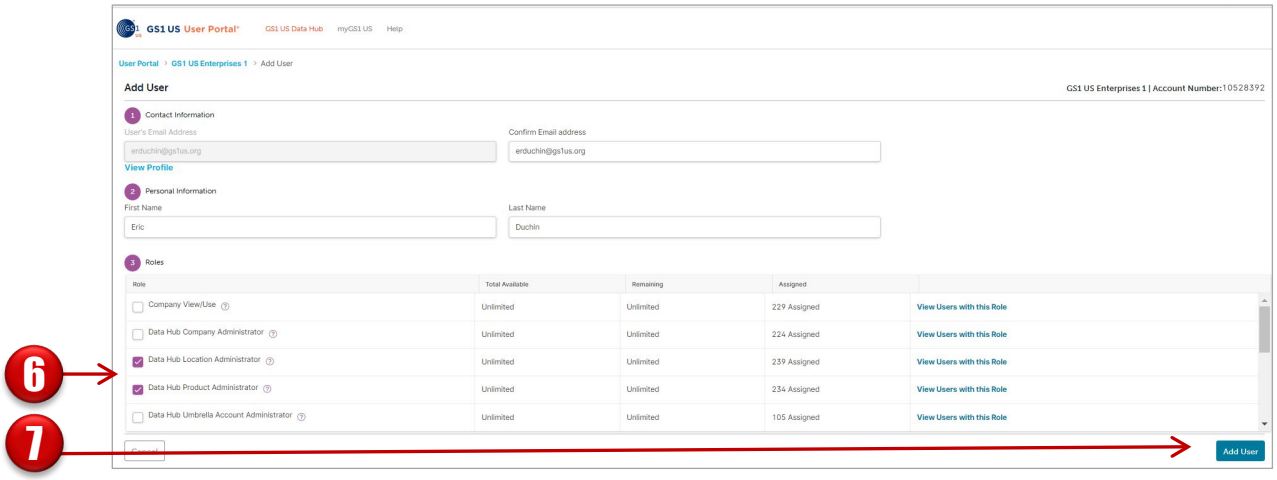
START

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.

CONTINUE

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



START

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.

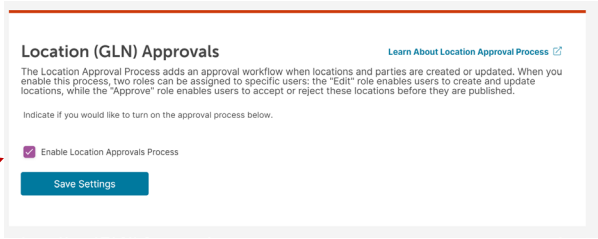
STOP

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 (GLN) Approvals**.

   Check the box for **Enable Approval Process**, then click **Save Settings**. You will now see the "Approval Process" options within the Location section of GS1 US Data Hub.



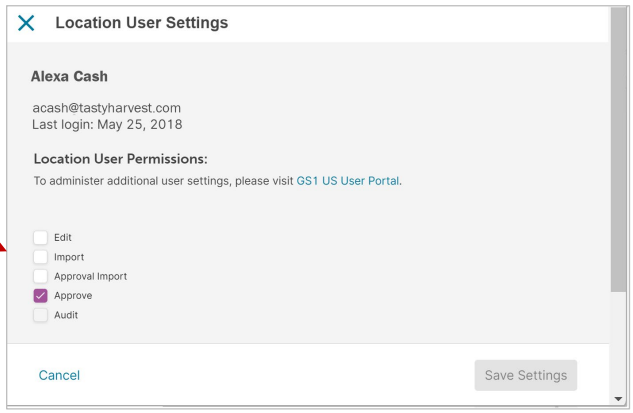
2) **Add new users via the GS1 US User Portal (if necessary).**
   If users already have access to GS1 US Data Hub, you can skip this step. Otherwise, visit the GS1 US User Portal article to learn how to add users and assign the "Location Create/Manage" role.

3) **Assign Location Approval user permissions:**
   - Click the **Administration** tab, then click **Location (GLN) User Permissions**. Click the username. Check the box for the desired user Location Approval user permissions, then click **Save Settings**:

   Edit: The "Editor" can create and update location information.

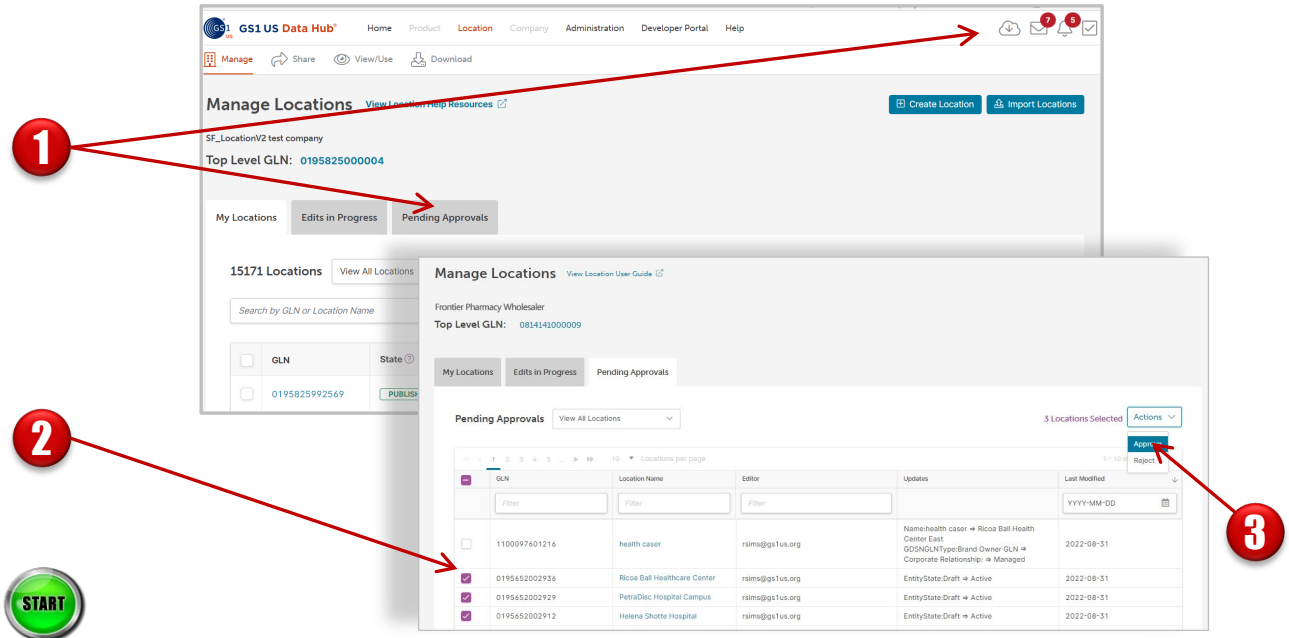
   Approval Import: Import location data as approved. This is useful if your company has a separate "Approver" user permission, and you don't want that person's mailbox to receive an approval request for each location you are importing.

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



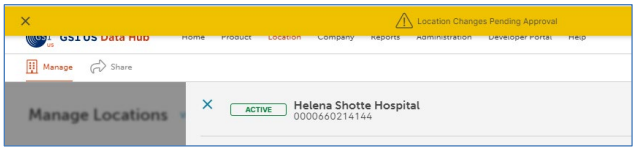
Approve or Reject Changes to a Location (*Continued*)

After you have selected the box for **Enable Approval Process** in the **Administration** section, assign the "Approve" user permission. First, visit GS1 US User Portal, create the user, and assign the "Location Create/Manage" role to this user. Then visit GS1 US Data Hub, click the **Administration** tab and then **Location (GLN) User Permissions**. Locate the desired user and select the **Approve** box for this user.



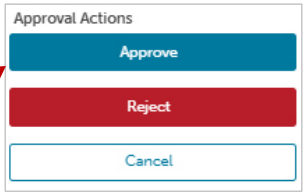
1 Click the symbol on the top right-hand side of the GS1 US Data Hub screen. This icon shows how many approvals are pending. Approvers can click the symbol to open the **Pending Approvals** screen.

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.

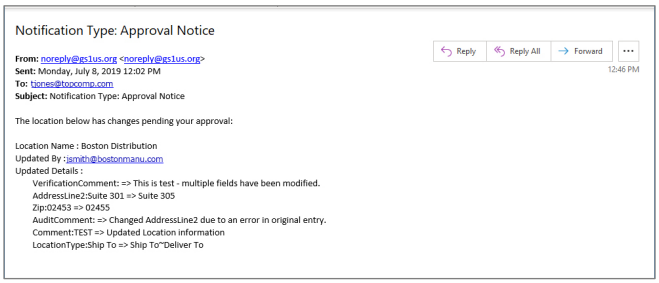


Revert to live version

CONTINUE

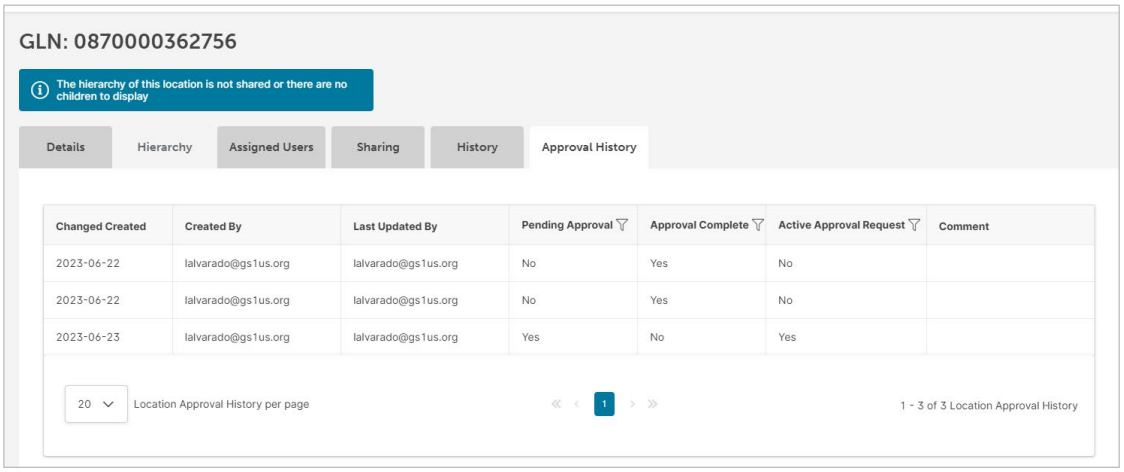
Approve or Reject Changes to a Location (*Continued*)

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.



Share a Location with Third Parties

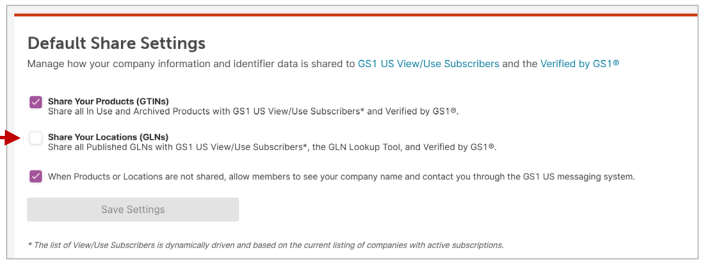
By default, when a Managed GLN subscriber publishes a GLN, it is shared with all GS1 US Data Hub Location View/Use subscribers - and with GLN Lookup Tool users.

View/Use subscribers (which includes Managed GLN subscribers) can query GLNs that were created as part of the GS1 Managed GLN subscription, and verify location/party details and company information.

You can turn off this "Share with All" default setting. You can then selectively share GLNs with one or more trading partners that are View/Use subscribers. These trading partners will have the ability to view – and download – GLNs and associated data. You can choose to share single locations or entire branches of your hierarchy.

Share with Select Trading Partners:

Click the **Administration** link, then the **Default Share Settings** link. Uncheck the **Share Your Locations (GLNs)** box. You will no longer be sharing all your GLNs, and can now share specific GLNs with trading partners.

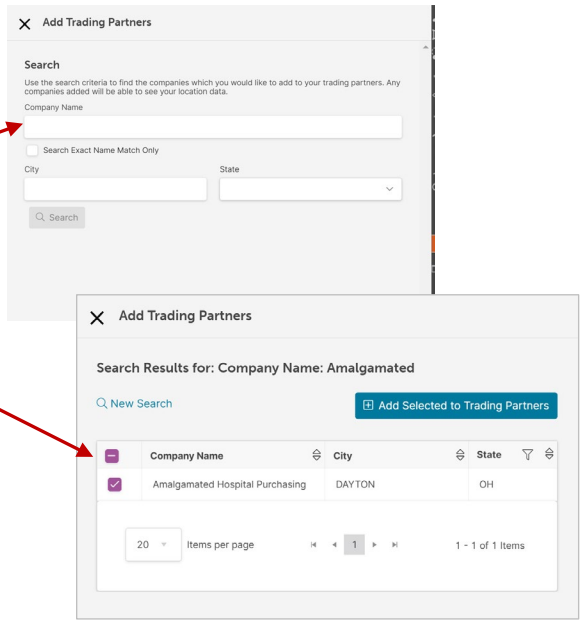


Q. What if we check the "Share all Published..." box again in the future?
A. When you share an individual GLN, you can indicate if you want to use the default setting, or if you want to continue to share – or hide – this GLN.

Create a Specific List of Trading Partners

A user with the Location Administrator role can set up a list of Trading Partners based on existing Location View/Use subscribers:

1. From the Managed GLN page, click the **Sharing** tab.
2. Click the **Add New Trading Partner** button. The Add Trading Partners window displays.
3. Query for the trading partner and click **Search**. When the Company Name displays, check the box and click the **Add Selected to Trading Partners** button.
4. After you have added trading partners, you can now select a GLN to share with this list.



Share a GLN with Your List of Trading Partners

When View/Use subscribers view your locations, they can view much of the same data that you see as the location owner.

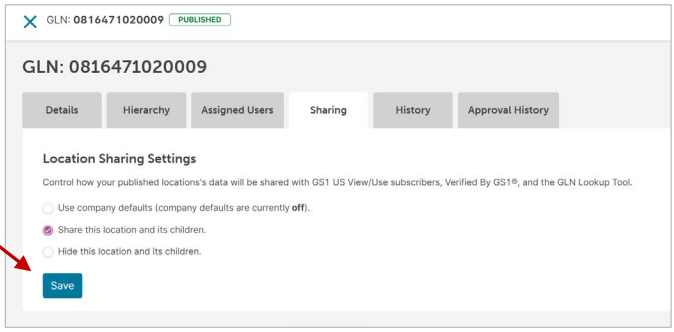
By default, all Location View/Use subscribers can see your **Published** GLNs. **Draft** GLNs are not shared. As explained on the last page, you can uncheck the box for **Share Your Locations (GLNs)** in the Administration section. You can then share GLNs with specific trading partners:

1. Click the GLN you want to share and then click the **Sharing** tab.

2. Check the box for **Share this location and its children**. Then click **Save**. This GLN will now be shared with your defined list of trading partners.

3. These trading partners will view all GLN data, including phone or email data.

   However, trading partners will not see how the GLN data was created, any "Comments", or the names of users who created or modified this data.



Note: For any GLNs you have not shared, any Location View/Use subscriber can request access by sending a message to your Location Administrator.

Q. How can I stop sharing ALL GLNs with subscribers?

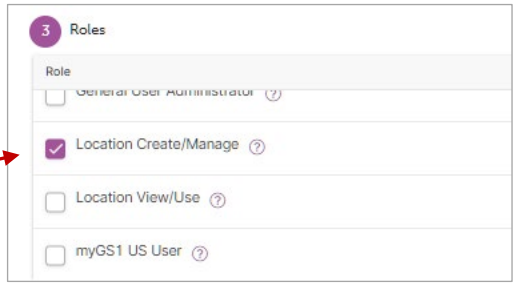
A. To stop sharing ALL GLNs with ALL Location View/Use subscribers, visit **Administration**, **Default Share Settings**, and uncheck the box for "Share Your Locations (GLN)" Click **Save Settings**. GLNs will stop being shared immediately.

   Similarly, to stop sharing company information for GLNs not being shared, the administrator can uncheck the box for "Display Company Information…" Subscribers will not be able to request access for more details.

Assign New Users to / Remove Users from a Location

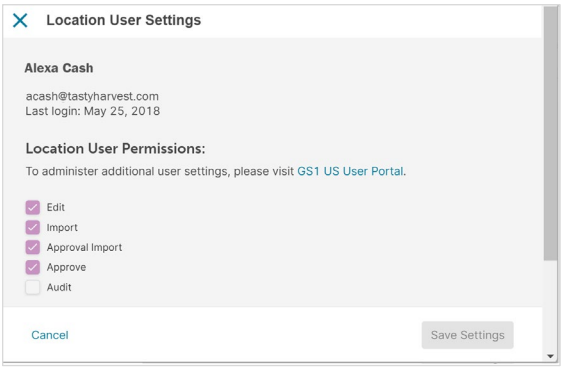
To assign a new user to modify a specific location (including related "child" locations, if available), follow these steps:

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



2. Click the **Administration** link from the main navigation bar, then click **Location (GLN) User Permissions**.

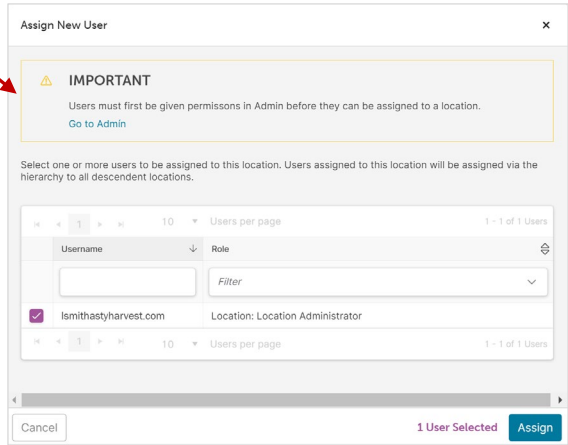
   Identify the desired user and click the **username**. The Location User Settings window displays. Select the desired user permission for this user, such as **Edit**. Click **Save Settings**.



3. Now you can assign this user to manage a specific location. Click **Location** from the main navigation bar. The **My Locations** screen displays. Click the desired "Location Name," then click the **Assigned Users** tab. The Assigned Users screen displays.

4. Click the **Add New** button. The Assign New User window displays. Check the box for the user you want to add to this location. Then click **Assign**.

   The user is added to this specific location and any "child" locations associated with this "parent" location.



Note: Before you assign Location Approval Process roles, make sure the Location Approval Process has been enabled. For more details, see the "Approve or Reject Changes to a Location" section of this user guide.