



The Global Language of Business

# Subscription Administrator Guide

For GS1 Canada Services



## Subscription Administrator Guide

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## Introduction

This document describes functions to be performed by the Subscription Administrator for GS1 Canada Services.

As a Subscription Administrator, you can use various search methods to find and manage users. You can add and remove users and grant and revoke access to user roles within the service.

### Logging In For the First Time

To log in as Subscription Administrator, you must have received an invitation email that contains the URL link where you can set up your Service Subscription Administrator login credentials.

Steps:

1. On the login page, specify your email address and password.  
The End User Licence Agreement (EULA) page appears.
2. Read the EULA document.
3. Click Accept.  
The GS1 Canada Services home page appears.

In subsequent logins, the EULA document does not appear.

## Home Page

The GS1 Canada Services home page is a place where you can perform various functions.

Immediately below the GS1 Canada banner, a number of navigation commands appear in a command bar. Click any of these commands to link to more information about GS1 Canada.

To change the language that appears on the home page, select the language link.

Below the header graphic, there are two navigation buttons:

- My Profile
- Administrator

The Subscriptions area appears below.

The chapters that follow describe the functions that you can perform in each.

### My Profile

These commands are available to all GS1 Canada subscribed users.

- Update My Profile – The User panel appears. You can make changes to your own user profile (Job Title, Work Extension, etc.) and save those changes. You cannot change your own login email address.
- Change Password – The Change Password panel appears. You can specify a new password and a password challenge question and response.
- Merge Accounts – The Merge Accounts panel appears. If you have the login email address and password of another existing account with the same first name and last name, you can merge all account details into the current account.

## **Administrator**

This navigation button is available only to the GS1 Canada Services Subscription Administrator.

To open the administrator page, click Administrator.

As a Services Subscription Administrator, this page allows you to manage users, locations and subscriptions in your company or organization.

The left column of the page shows the following navigation commands:

- Company – View details of your login company and find users in this company.
- Locations – Search for and display locations within the company and users at a specified location.
- Users – Search for and display users within your GS1 Canada subscription.
- Subscriptions – Display a list of GS1 Canada services to which your organization has subscribed and users who have roles within those service subscriptions.
- Invitations – Search the list of invitations that have been sent and users who have not completed the setup process.

## **Company**

You can view details of your login company.

You can open the Company panel in the following ways:

- In My Company, click Company.
- In the Location details panel click Company.

At the bottom of this panel, there are buttons for links to the following:

- Locations – Search for users based on locations associated with this company.
- Subscriptions – Search for users based on services to which this company is subscribed.
- Users – Search for and display users associated with this company.

## Locations

You can open the Search Locations panel in the following ways:

- In My Company, click Locations.
- In the Company panel, click Locations.

To search for a company location, specify search parameters in one or multiple search fields and click Search. To show a list of all locations, leave all search parameters blank.

The search results panel appears showing a list of locations that match the search criteria.

To search within the list of locations, in the text box at the top of a column, specify a text or number pattern. The search results panel changes to show all locations with a matching pattern.

To view details for a location, in the Action column for a location, click View Details. The Location details panel appears.

## Users

You can open the Search Users panel, in the following ways:

- In My Company click Users.  
Add or manage all users associated with all companies and all locations.
- In the Company panel click Users.  
Add or manage all users associated with the specified company.
- In the Location details panel click Users.  
Add or manage users associated with a specified location.
- In the Service Subscriptions panel, click Users next to a service name.  
Add or manage users associated with a specified subscribed service.

For help with adding or editing a user or changing a user's status (active/inactive), see "User Maintenance" ([page 8](#)).

### ***Searching for a User***

To search for a user, specify search parameters in one or multiple search fields and click Search. To show a list of all users, leave all search parameters blank.

The search results panel appears showing a list of users that match the search criteria.

To search within the list of users, in the text box at the top of a column, specify a text or number pattern. The search results panel changes to show all users with a matching pattern.

### **Subscriptions**

You can open the Service Subscriptions panel in the following ways:

- In My Company click Subscriptions.
- In the Company panel click Subscriptions.
- In the Location details panel click Subscriptions.

A list of GS1 Canada services to which your organization has subscribed appears. To search within the list of services, in the text box at the top of the Service column, specify a text pattern. The search results panel changes to show all services with a matching pattern.

To open the Search Users panel for user maintenance, click Users.

### **Invitations**

To open the Search Invitation and Welcome Notifications panel, in My Company click Invitations.

You can view a list of notifications that have been sent to recipients who have not yet completed the user setup process.

To search for a notification, specify search parameters in one or both search fields and click Search. To show a list of all notifications, leave both search parameters blank. The search results panel appears showing a list of notifications that match the search criteria. The status of each notification appears in the Status column.

### ***Actions on Notifications***

You can take action on notifications.

1. In the Search Invitation and Welcome Notifications search results, choose a notification and, in the Action column, click View Details.  
The notification details panel appears.
2. Review the details to be certain that you can identify the user.
3. If the notification has not expired, to deactivate the link in the notification, click Deactivate.  
A confirming message appears.
4. If the notification has expired, to resend the expired notification to this user, click Resend.  
A confirming message appears.

## User Maintenance

This chapter describes how to add, edit and change active status or inactive status for users in the system.

### Add a User

You can add a user to a company, a location or a subscribed service.

For help with opening the Search Users panel, see "Users" ([page 6](#)).

Steps:

1. In the Search Users panel, click Add User.  
The User Details panel appears.
2. In Email Address, specify the email address of the user.
3. To ensure that this email address is not already added, click Validate Email Address.  
The expanded User Details panel appears.
4. Specify details of the user.  
Fields with a red star are required (\*).
5. Click Save.  
If you started from the Service Subscription panel, the Location and Subscription panels appear. The new user is already assigned to the selected subscription. Skip ahead to step 7.  
Otherwise, the Location and Assign Subscription panels appear.
6. In Assign Subscription, to include this user in a subscribed service, click Select next to a service.  
A list of user roles appears.
7. To assign a role to this new user, select the check box next to the role name.  
In some cases, you can assign multiple roles.



8. Optionally, to verify the location details, click the plus sign (+) on the Location title bar.
9. Click Save.
  - The user is added and a welcome email is sent to the user.
  - A confirming message appears at the top of the User details panel.
  - The user name appears everywhere a list of users appears.

## **Edit a User or Change Status for a User**

You can update user details, reset password or change status (active/inactive) for a user.

To open the list of users, in the Search Users panel, click Search.

For help with opening the Search Users panel, see "Users" ([page 6](#)).

Steps:

1. Click the email address next to a user.
  - The User detail panel appears.
2. Revise field values as required.
3. To change user status, do the following:
  - a. If the user status is "Active", in Change User Status click Deactivate.
    - A confirming message appears.
    - Click Yes.
  - b. If the user status is "Inactive", in Change User Status click Activate.
    - A confirming message appears.
    - Click Yes.
  - c. A confirming message appears at the top of the panel.
4. To reset user password, in Reset Password click Reset Password.
  - An email with a temporary password is sent to the user.
  - A confirming message appears at the top of the panel.
5. Click Save.

A confirming message appears at the top of the User details panel.

## **Assign Existing Users**

You can assign existing users to either a Location or a Subscribed Service.

The action is similar in both cases.

## Locations

To assign existing users to a Location:

1. In My Company, select Locations.  
The Search Locations page appears.
2. Click Search.  
The list of locations appears.
3. In the Action column, for a location, click View Details.  
The Location page appears.
4. At the bottom of the page, click Users.  
The Search Users page appears.
5. Click Assign Existing Users.  
A list of users appears. If a user is already assigned to this location, the Assign To column shows the value "Assigned".  
If no list appears, that indicates that all users are already assigned to this location and you can take no further action.
6. In the Assign To column, select the check box next to one or multiple users.
7. Click Assign To.  
A success message appears at the top of the page.

Selected users are assigned to this location.

## Subscriptions

To assign existing users to a Subscribed Service:

1. In My Company, select Subscriptions.  
The Subscriptions page appears, showing a list of services.
2. In the Action column, for a service, click Users.  
The Search Users page appears.
3. Click Assign Existing Users.  
A list of users appears. If a user is already assigned to this service, the Assign To column shows the value "Assigned".  
If no list appears, that indicates that all users are already assigned to this service and you can take no further action.
4. In the Assign To column, select the check box next to one or multiple users.
5. Click Assign To.  
A success message appears at the top of the page.

Selected users are assigned to this service.



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