# firstbase healthcare User Manual
**for data suppliers**

firstbase healthcare - the industry solution for standardised item master data exchange
in the Swiss healthcare system

*Version 1.0, August 2023*

## Overview

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# Table of contents

# 1    Introduction

## 1.1    How is this manual structured?

This manual introduces you step by step to the handling and use of firstbase healthcare and explains the user interface and the most important functions.

## 1.2    Target group

This manual is intended for data suppliers who enter/supply/maintain item master data in firstbase healthcare and publish it for their customers.

> **Note:**
>
> A version for data recipients is in progress.

## 1.3    Scope and delimitation

No interfaces are described in this manual. Information on the interfaces can be found on our firstbase website under the menu item "Services" under "*Documents & Links*"

## 1.4    Who is responsible for publication?

Item master data can be entered and supplied in firstbase healthcare via various channels and in several formats. They are validated and then published in the firstbase healthcare catalogue (= published). The rules for the publication of item master data in the Swiss target market are basically as follows:

- Brand owner in Switzerland: The brand owner based in Switzerland is responsible for all matters relating to his own items in the Swiss target market. He publishes item data in firstbase healthcare.

- Brand owner outside Switzerland: The brand owner located outside Switzerland is not responsible for the publication of item master data in the Swiss target market. He only publishes item data in firstbase healthcare if this has been agreed with the distributor (dealer, importer or Swiss authorised representative).

- Distributor: The trading company in Switzerland is generally responsible for the publication of item data in the Swiss target market. It publishes item data in firstbase healthcare in coordination with the distributor.

- Importer: The distributor based in Switzerland who imports goods into the Swiss target market is responsible for all matters relating to imported items in the Swiss target market. He publishes item data in firstbase healthcare.

- CH-REP: The Swiss authorised representative (CH-REP) is basically responsible for the publication of item data in the Swiss target market. He publishes item data in firstbase healthcare, in coordination with the distributor.

> **Note:**
>
> Items are published in firstbase with the primary key [GTIN:GLN:target market]. It is therefore impossible for the same item to be published in firstbase by the same information provider. However, the same GTIN can be included several times in the solution, each time by different information providers.

# 2 Overview of the firstbase web application

After you have successfully registered and logged in, the web application shows you a dynamic dashboard with an overview of your item data (in the beginning, the display is empty because no item data has been entered yet).
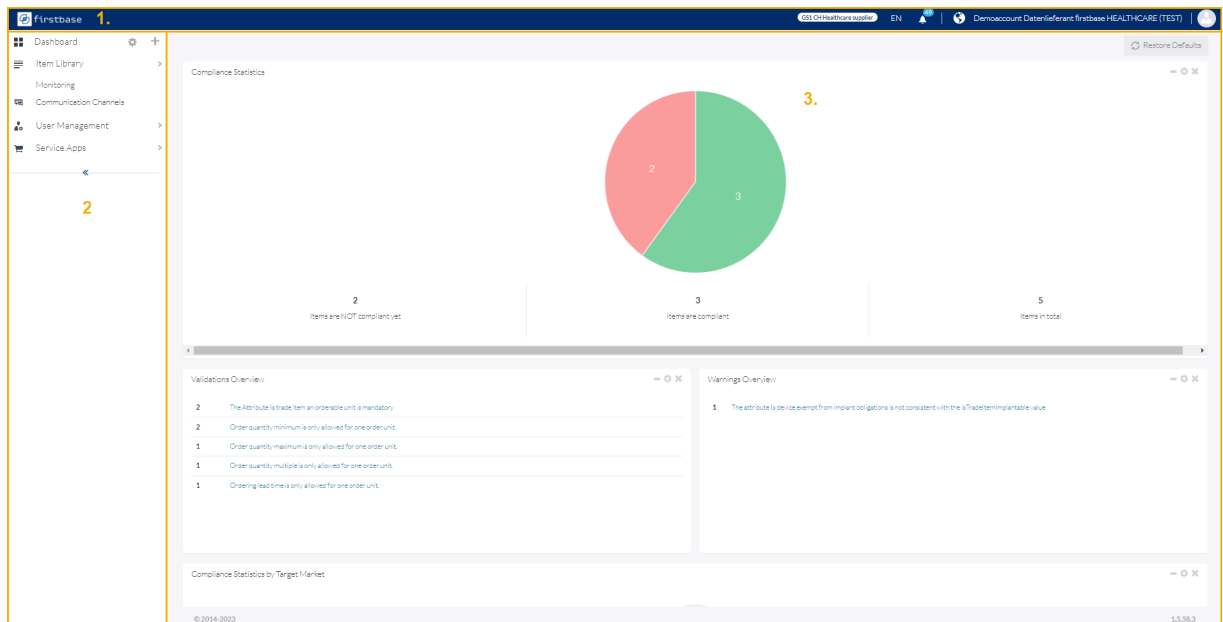


1. At the top of the screen, you have the option on the right to

   o change the interface language

   o view notifications (Activity Feed)

   o adjust the settings of your user information, in particular you can change your user password here.

   o log out and thus log off from the web application.

2. On the left side of the screen, you will see the menu. This will take you to the various application functions:

   o "Item Library" leads you to "Browse" *(see chapter Entering item data ff.)*, to the import and export functions and to the assets function, with which media can manage assets such as image files, declarations of conformity, certificates, safety data sheets and other pdf documents.

   o "User Management", to create new users (see chapter *Creating a new user*) and to assign roles to the users.
   This menu item is only displayed for certain roles, for more information see *User Roles*.

   o Under "Service Apps" you will find the online catalogue with an overview of all your items in display mode.

3. In the content area you will find various widgets that provide you with information about the items you have entered. [1]The widgets are explained in the following chapters.

---

[1] A widget is a control element in a graphical user interface

# 3 Dashboard overview

## 3.1 Compliance statistics widget

The Compliance Statistics displays a compliance chart after you have entered or imported items. The compliance diagram shows you how many items you have entered in total and how many of them are free of errors (= compliant) and still defective (= NOT compliant).
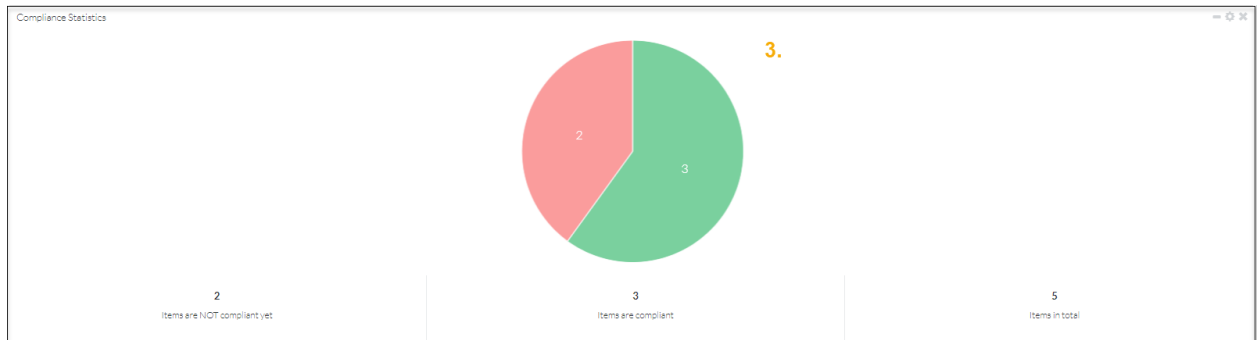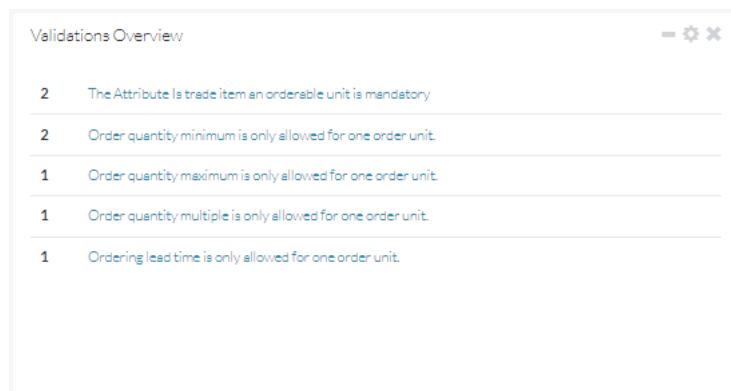


*Figure 1: The conformity diagram shows the ratio between items that have been recorded or imported without errors and those that still have recording errors.*

**Note:** The circle sectors are clickable and lead you to the overview of compliant and NOT compliant items.

## 3.2 Validations overview

The validations overview shows how many items have a specific error.



*Figure 2: Validation error widget*

The entries in the validation overview are clickable and lead you accordingly to the overview of all items that have exactly this error.

**Note:**
Error means that the item does not yet comply with the healthcare requirements in the Swiss market. Errors must be corrected before an item can be published.

## 3.3 Warnings overview

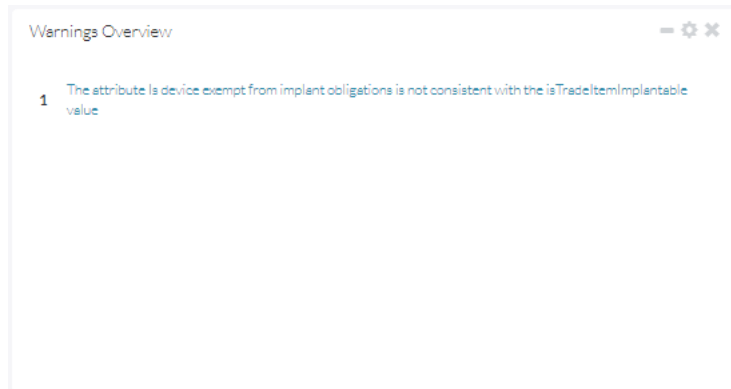The warnings overview shows how many items have a specific warning.



*Figure 3: Warnings widget*

The entries in the warnings overview are clickable. If you click on the warning description, all items that have this warning will be displayed.

**Note:**

Warning means that data is probably still missing or not correctly maintained for the item. You should check the corresponding notes and, if necessary, make corrections. However, these corrections can also be made later. The item can also be published with one or more warnings.

## 3.4 Difference between validation errors and warnings

firstbase distinguishes between validation errors and warnings. Validation errors occur when entries are incorrect or mandatory information is missing. Warnings, on the other hand, are displayed if, for example, an optional specification such as "storage temperature" has not been filled in, which is desired by the data recipients but is not defined as a mandatory until a release in the future. Item master data containing warnings can still be published. On the other hand, the solution prevents the publication of item master data with validation errors.

Both errors and warnings are displayed in the widgets described above, in the item overviews as well as at item level (there at the corresponding attribute).

**Note:**

The validation rules and the target market profile are continuously maintained in the *expert group Master Data Healthcare*. The current target market profile (Profiles Overview) can be downloaded from the *firstbase website* under the menu item "Services" under "*Documents & Links*".

# 4 Entering item data

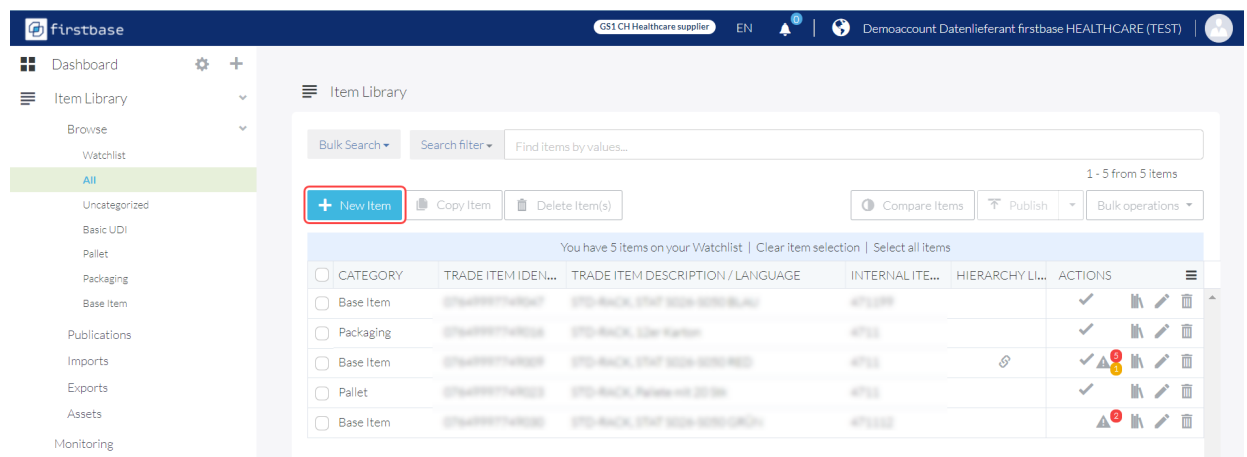This chapter describes how to enter an item via the web interface (GUI).

> ⚠️ **Note:**
>
> When entering item data, make sure that you start with the base item. Then create the packaging as the next higher level and link these hierarchy levels together to form an item hierarchy. If necessary, add the pallet as a further hierarchy level and link it to the packaging.

## 4.1 Create your first item - Base Item



*Figure 4: Overview of the view in the menu Item Library --> Browse*

1. Click in the menu on **Items Library → Browse → Base Item**
2. Click on **"+New item**
3. Fill in at least all the mandatory details - and if possible, add any optional details that your customers are waiting for.
4. Save and save the data by clicking on **"Create"**.

> ⚠️ **Note:**
>
> The base item is the smallest unit of an item hierarchy and always the starting point for creating a new item. You specify whether an item level - i.e. the base item, the packaging or the pallet - is an order or delivery unit individually for each item level.
>
> ⚠️ To make your item master data visible and available to data recipients, the item master data must be published (see chapter *Publish items*).
>
> ⚠️ The GTIN (Global Trade Item Number) is recorded in firstbase with 14 digits. For this purpose, a 13-digit GTIN is preceded by a 0. This method does not change the check digit at the end of the GTIN.

### 4.1.1 Create packaging

Under the category "Base Item", you can create the packaging at the same time as the base item. To assign packaging, add a new element under the attribute group "Packaging".

"Contained GTIN" corresponds to the GTIN of the base item and at "Trade Item Identification: GTIN" the GTIN of the packaging is to be entered. The item level describes the type of item contained in the packaging.
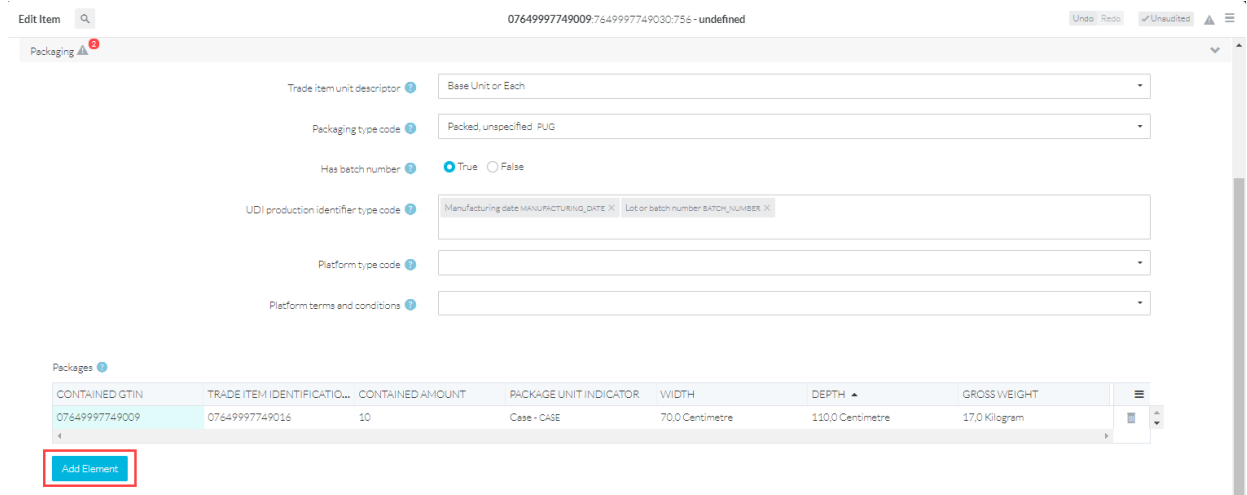


*Figure 5: There are 10 base items in one package*

### 4.1.2 Create pallet

Under the category "base item", you can create the pallet with the base item and the packaging at the same time. To assign a pallet, add a new item.

In "Pallets", "Contained GTIN" corresponds to the GTIN of the base item / packaging. Additionally, the "GTIN" of the pallet is to be entered. The pallet unit indicator describes the type of platform.
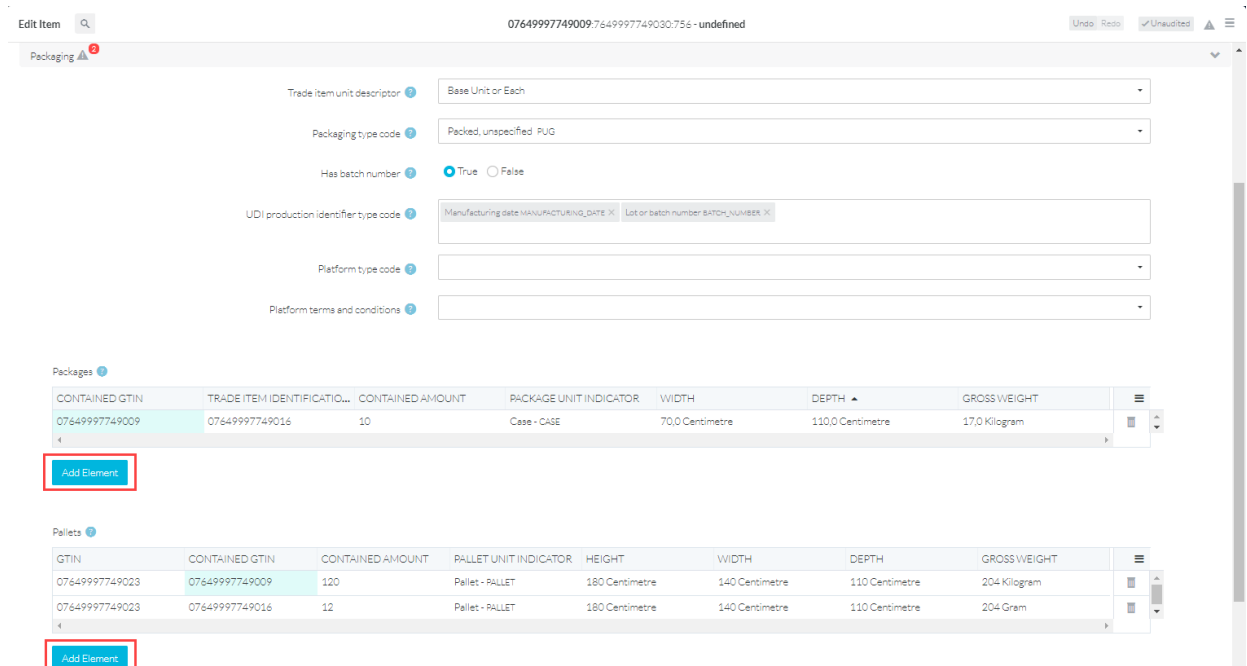


*Figure 6: There are 1**2** packages on a pallet, each containing 10 base items*

# 5 Storing files (assets)

In firstbase, you can manage media assets such as image files, declarations of conformity, certificates, safety data sheets and other pdf documents to assign them to your items. Under the menu Item Library, you can create new folders under "Assets" and manage the corresponding media assets in them.
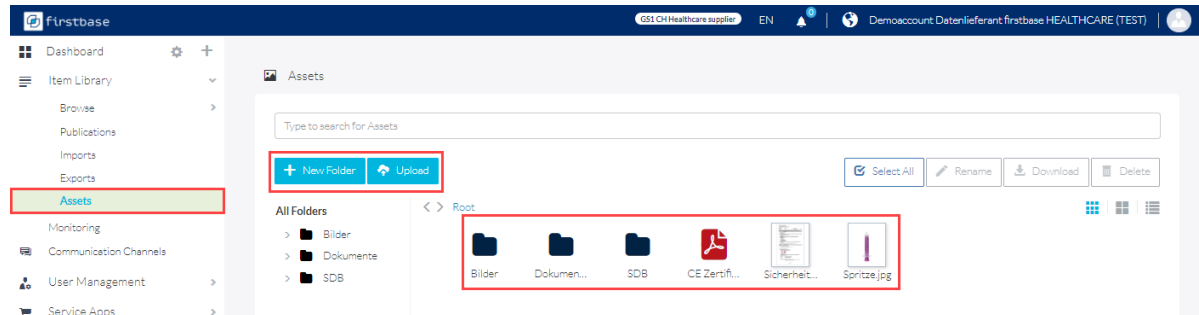


*Figure 7: Storing various files in the assets*

## 5.1 Images

In firstbase, you can upload your item images from your device into a folder. In the menu "Assets", use "+ New folder" to create your desired folder structure.

In the example, a new folder with the name "Bilder" was created. Double-click on the folder to access it. You can now use the **"Upload"** command to drag and drop your item images into firstbase using either "Browse" or the practical "Drag & Drop" function.
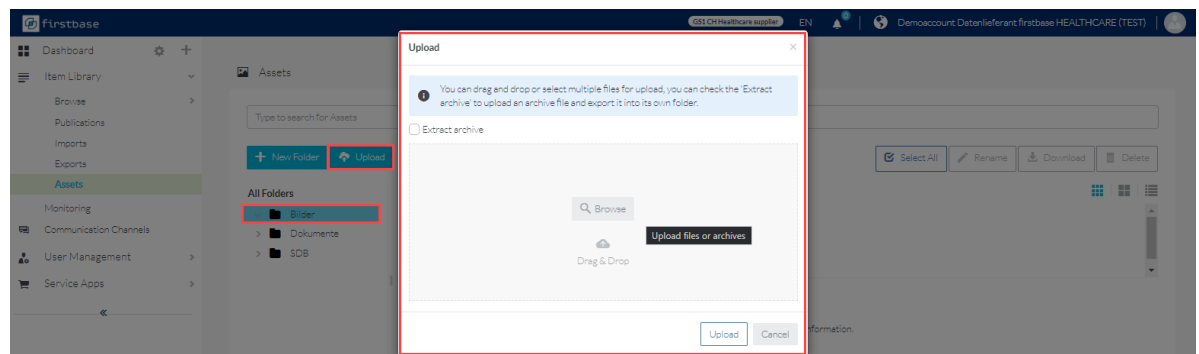


*Figure 8: Image upload via local computer or drag & drop*

## 5.2 Certificates

The upload of certificates works identically to the upload of images, which is described in the previous chapter. In the example shown, a "Dokumente" folder has been created. You can activate the certificates after double-clicking on this folder with **"Upload".** You also have two options here to upload your certificates. Click on "Browse" to access your explorer and select the desired asset. Or you can drag and drop the desired object into firstbase.
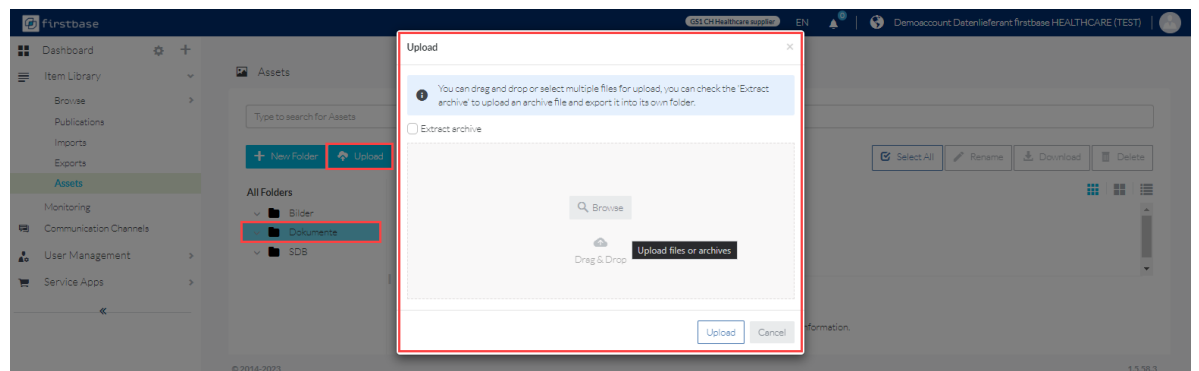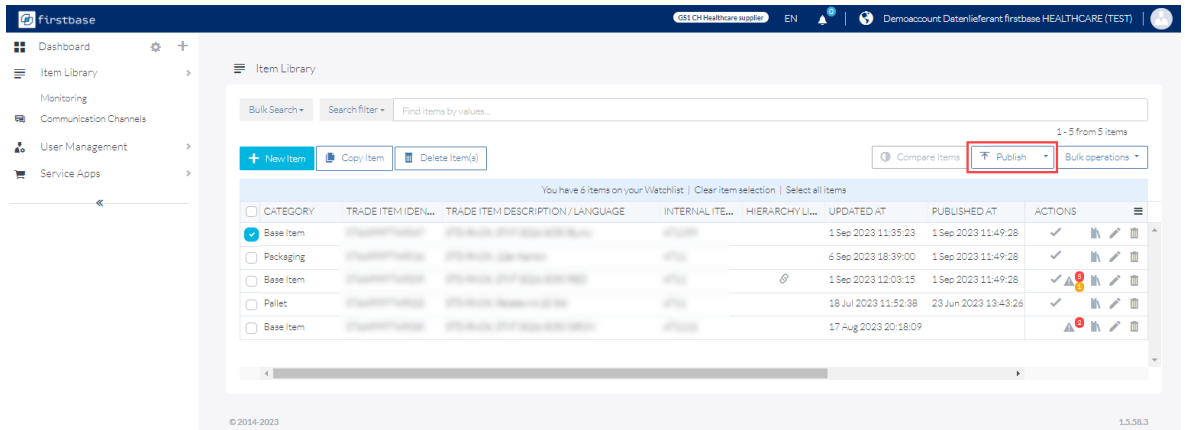


*Figure 9: Certificate upload via local computer or drag & drop*

## 5.3 Publish items

For the data recipients to see your items, you must first publish them.

1. Select the items to be published in the item list.

2. Then click on **"Publish"**.



3. Click on **"Publish"**

4. Select organisation or communication channel

5. Select the time of publication
Publish item immediately: The items will be published immediately.
Plan publishing: The items will be published as of the scheduled date.

6. *Optionally repeat publishing*: Do you have items which are updated at regular intervals? Here you can enter the repetition/s of the publications and their regularity.

7. Confirm the settings by clicking on **"Publish".**

> **Note:**
>
> firstbase healthcare is available as an industry solution for the Swiss healthcare system for all connected data recipients and service providers. All items published by data providers to firstbase healthcare are accessible to **all** connected data recipients. If, as a data supplier, you wish to explicitly transmit item data - for example for customer-specific items - to only one customer (data recipient/service provider 1:1), we recommend data exchange via GDSN. Contact us in this regard, we will be happy to advise you on the implementation.

## 5.4 Delete items

This section describes how to delete items.

⚠️ **Note:**

To delete an item that is already published, all the activities described in the chapters "*Depublish an item before deleting it"* and "*Delete item*" need to be carried out. Otherwise, the item remains visible to the data recipient.

If you have not yet published the item, you can skip the step described in the chapter "*Deleting an item before deliting it*" and go directly to the chapter " *Deleting item*".
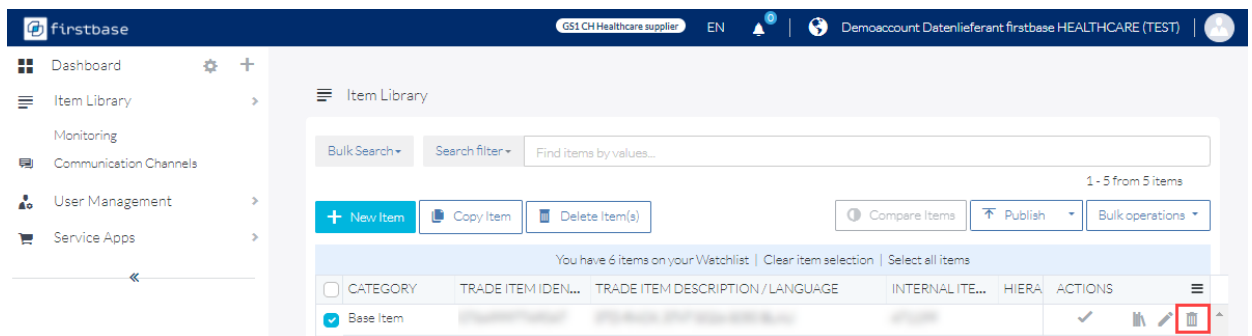
### 5.4.1 Depublish an item before deleting it

You depublish an item by selecting the item to be depublished and then setting it to **"Depublish"**.
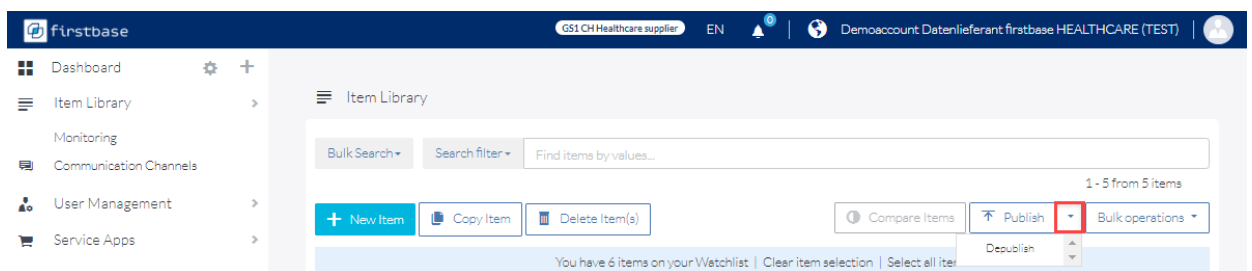


### 5.4.2 Delete item

An item can be deleted by clicking on the bin icon. Note that you have previously depublished the item if it is an already published item.
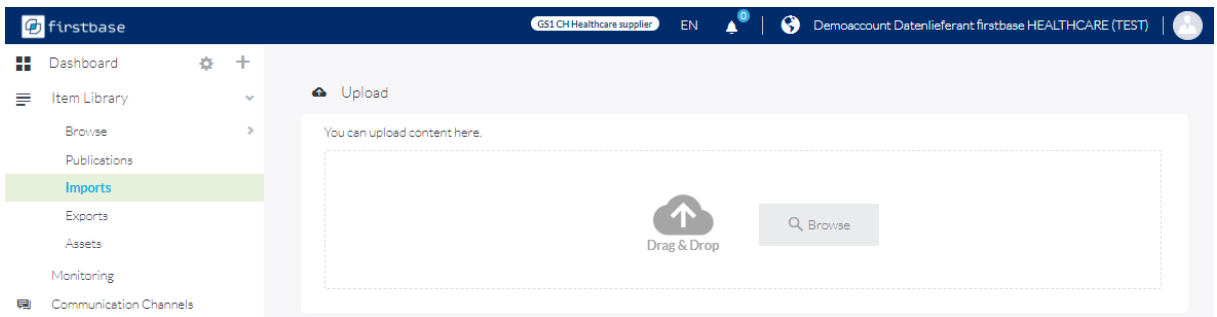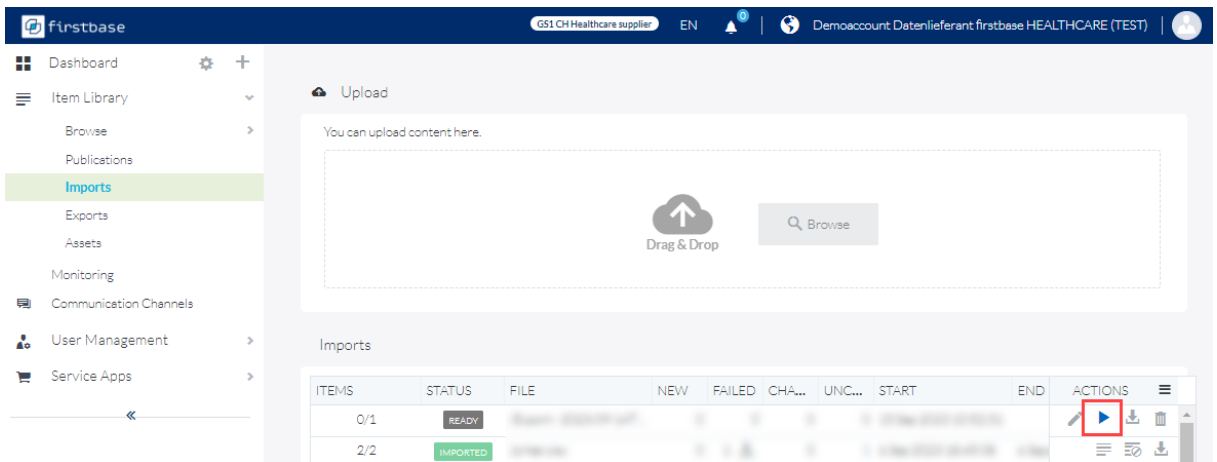
# 6 Importing items

If you would like to import your items via an Excel, JSON, XML or firstbase healthcare XML file, upload the file via "Imports", which can be found under the menu Item Library.
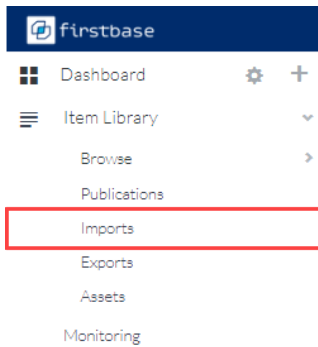


You can insert the file via drag & drop or via the "Browse" button from your Explorer menu.



To start the import, click on the play button.

# 7 Exporting items

With firstbase healthcare you can export your items in various formats. This chapter describes how to export one or more items.

Items can be downloaded as different data formats and used as a template for import. You can export your items as Excel files, JSON, XML and firstbase healthcare-XML.
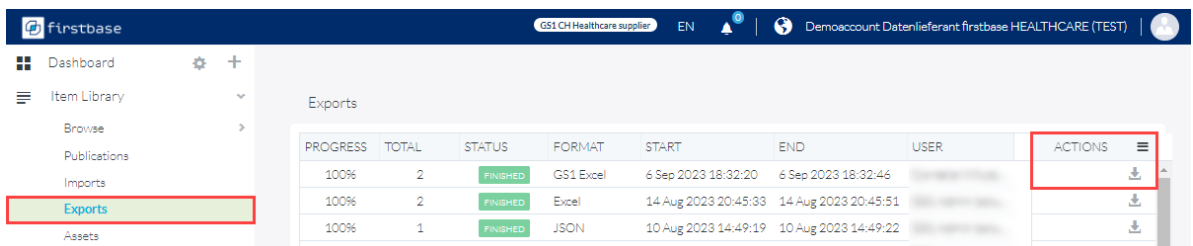
1. Select any item or all items.
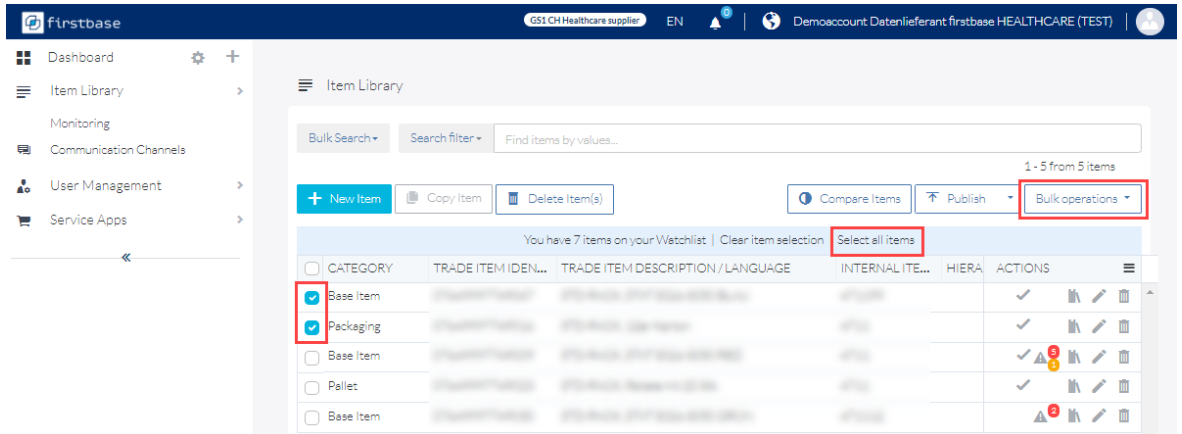


2. Click on mass operation "Download" and select the desired format.
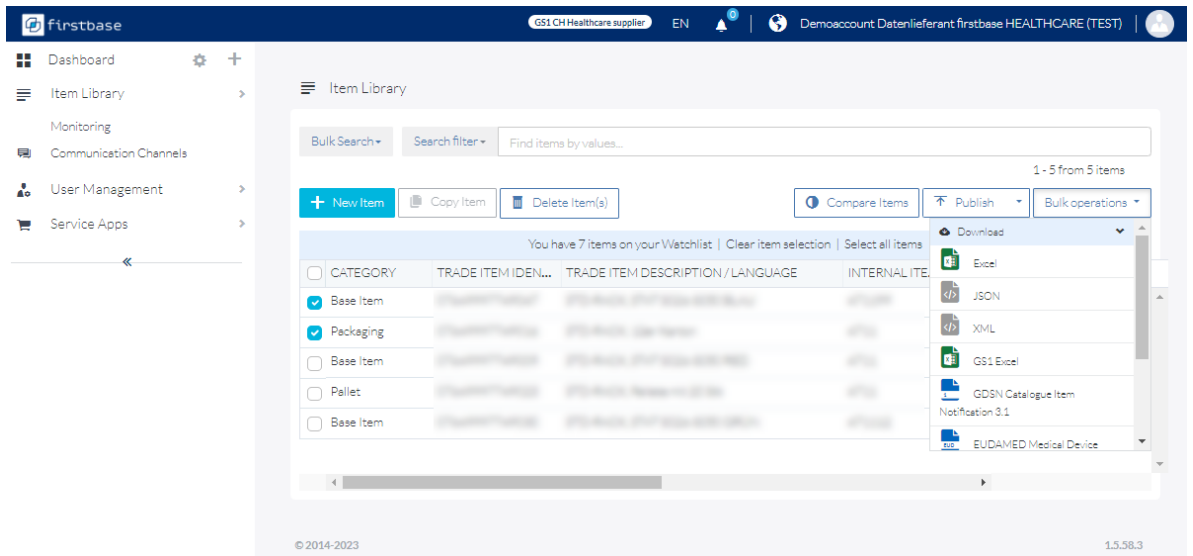


3. Start the export

4. All exported files can be found in the "Exports" menu.



Click on the download symbol to download your exports to your computer.

# 8 Options for bulk editing of items

Sometimes information in an attribute needs to be adjusted for all items or a large quantity of items.

In firstbase healthcare you have two options to choose from: mass update using bulk operations or using an Excel file.

If the items affected by a change are to have the same value everywhere in the attributes to be changed, the mass update under the bulk operations is an option. If the changes are more complex, we recommend making the adjustments via the Excel export and a subsequent import of the changed data.

## 8.1 Mass update via the bulk operations

To perform a mass update, select the items to be changed and click on **Bulk operations → Mass Update.**
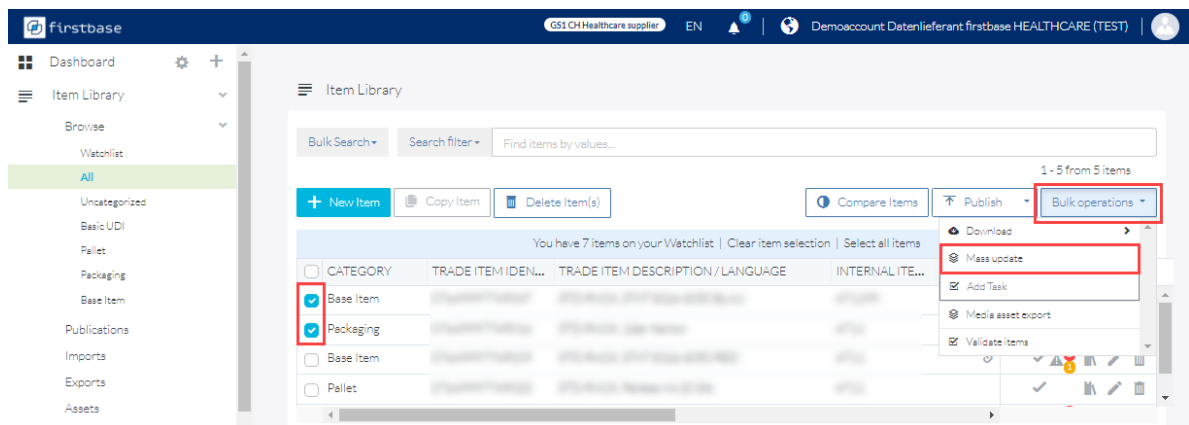


In the following dialogue, drag the attributes to be edited from the right-hand side of the screen into the "Choose attributes" field and confirm your selection by clicking on **"Next".**
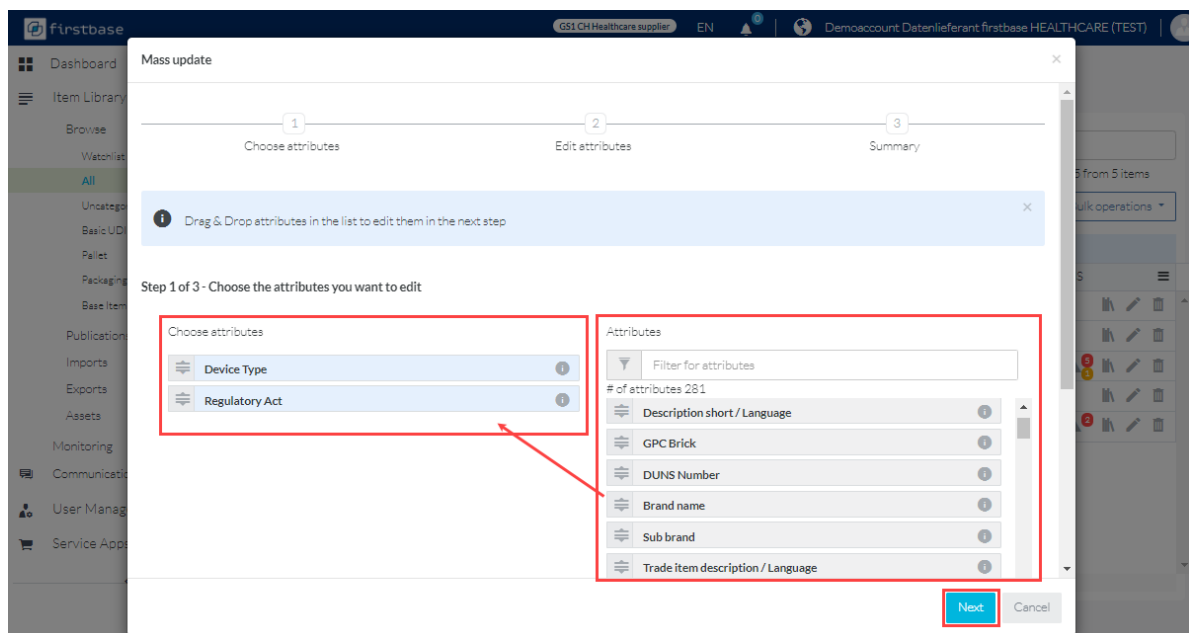


*Figure 10: Dialogue to select attributes to be edited via the mass update function.*

Then enter the new value in the corresponding field and check your entries in the "Summary" dialogue. If everything is OK, carry out the changes by clicking on **"Start action"**.

## 8.2 Mass Update with excel

To carry out an item data update via Excel, first export the items to be changed. After making the changes, you can import the file again. The corresponding steps are described in the chapter "*Exporting items*" and "*Importing items*".
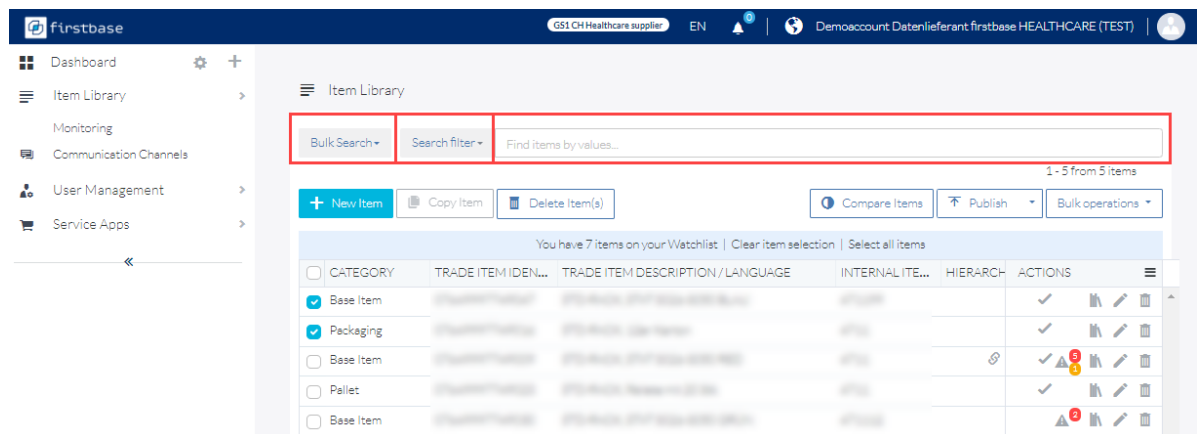
> **Note:**
>
> Please note that for a correct assignment of a table row to the item, the columns category, gtin, gln and targetMarket must always be supplied.
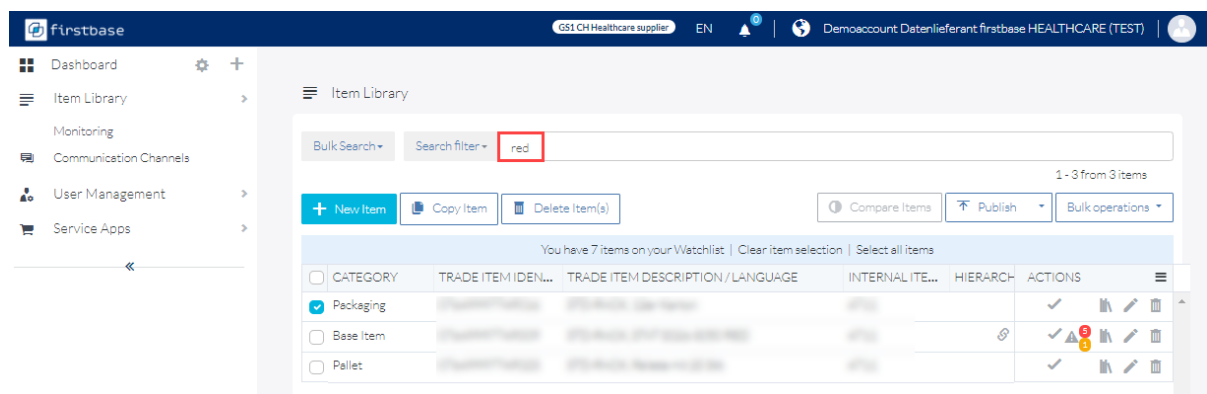
# 9 Search functions

At item level, search filters can be set via the search bar or the "Bulk search" button. You can filter for new items and suppliers, display item data, compare items, and download selected items as Excel, XML or JSON files.


*Figure 11: General catalogue view*


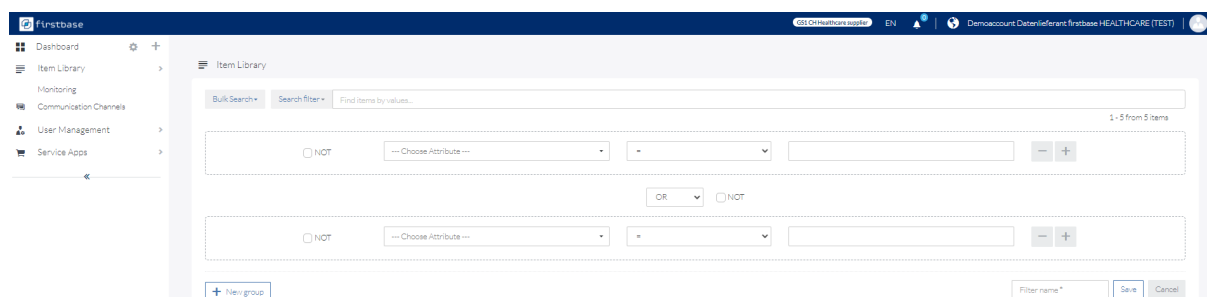*Figure 12: General catalogue view with search results*


*Figure 13: Extended filter options*

## 9.1 Bulk search

In the bulk search, you can search for a specific attribute with several search values.
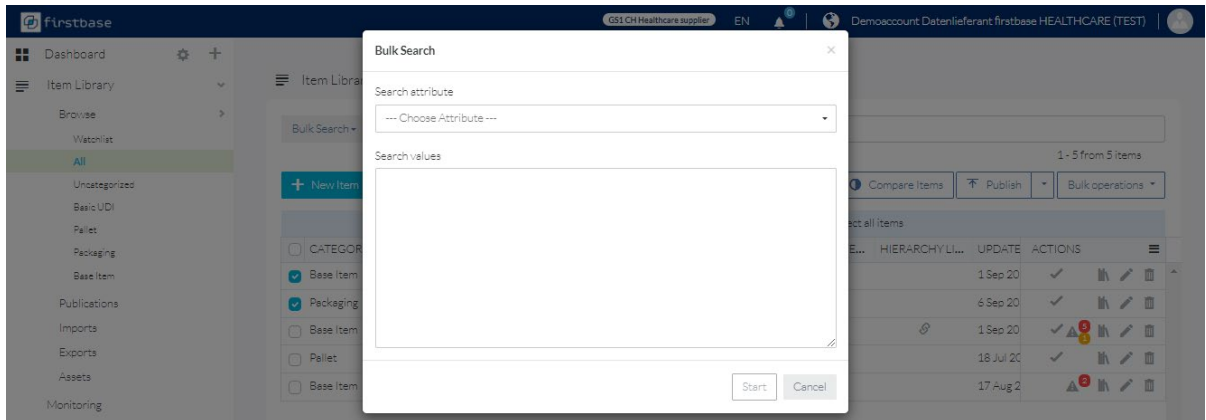


*Figure 14: Bulk search with specific search values*

## 9.2 Search filter

With the search filter you can make queries with predefined rules or create a search filter yourself.
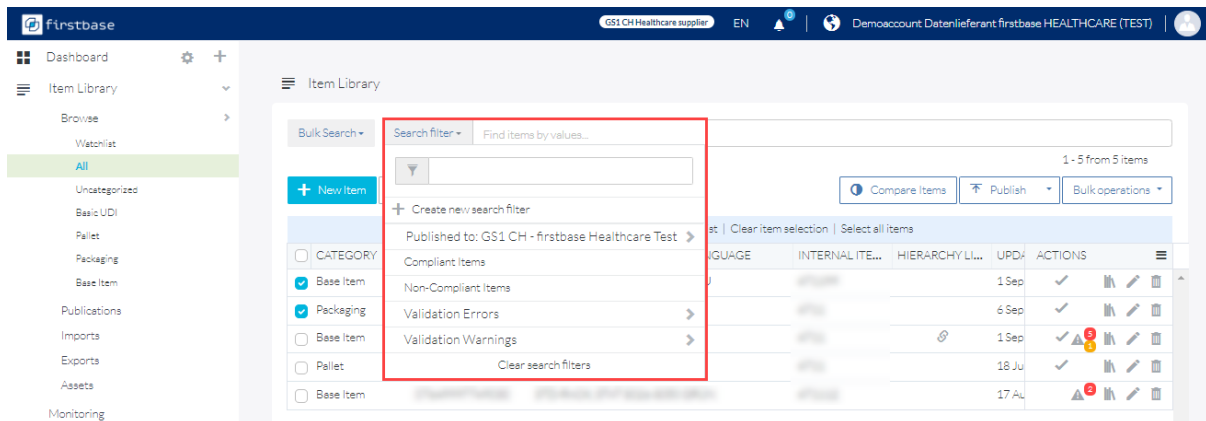


*Figure 15: Predefined search filters*

## 9.3 Creating individual search filters

To create a more complex search filter, click on **"+Create new search filter"** and then on **"+New group"**.
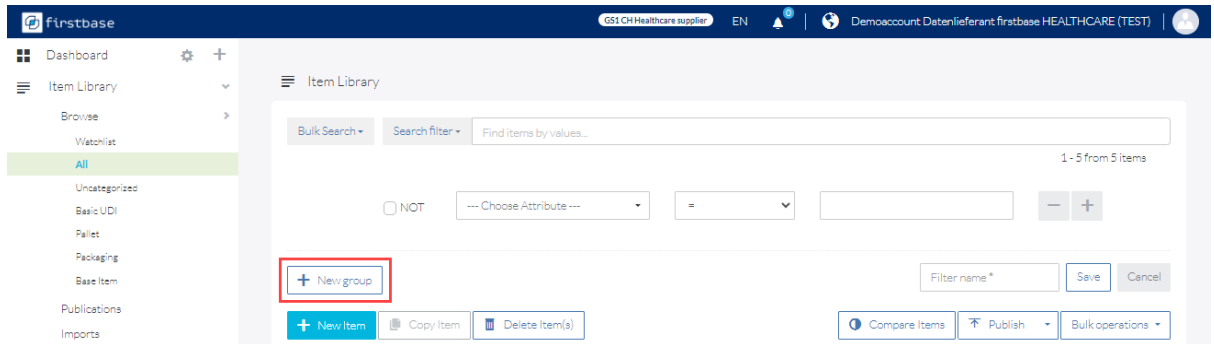


*Figure 16: Turning a simple search filter into a complex one*

The logic can be extended as desired. Before you can save the filter, give it a name.
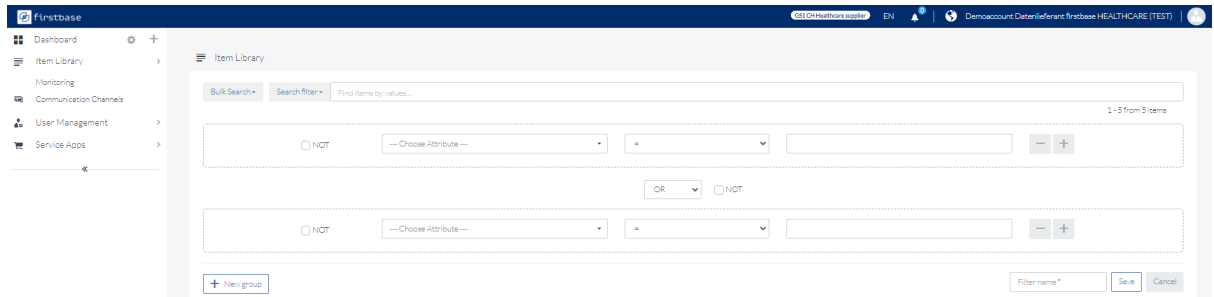


*Figure 17: Complex search filter creation on logic existing*

# 10  User management

In the user administration you can add users and manage their access rights (= roles).

## 10.1  Create a new user

In the User Management menu, you will find an overview of all users.

To add a new user, proceed as follows:

1.  Click on **"+New User".**

2.  Enter the e-mail address of the person who is to receive an invitation to use firstbase healthcare.

3.  Assign one role to the person

4.  Leave the "Filter" field empty

5.  Leave the "Query" field empty

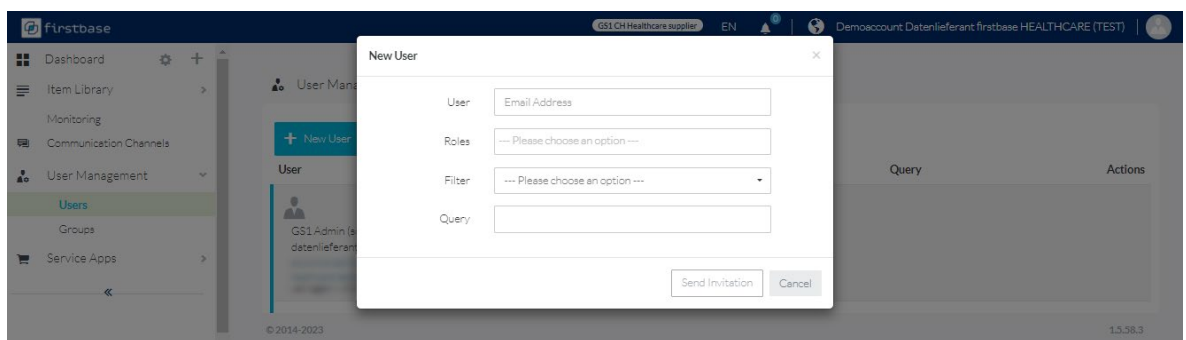6.  Send the invitation by clicking on **"Send Invitation"**.



*Figure 18: Dialogue to create new users*

## 10.2  User roles

There are predefined user roles. The following is an excerpt of the most common roles.

| Role | Authorisation |
|------|---------------|
| admin | A user with the role admin has all read and write permissions in item library and user management. |
| editor | A user with the role editor has all read and write permissions in item library. |
| View_only | A user with role view_only has read permissions in item library. |

# 11    User Data

The settings will take you to "User Data", where you can change your password and user information.

Click on the profile picture and then on "Account Settings" to get to "User Data".
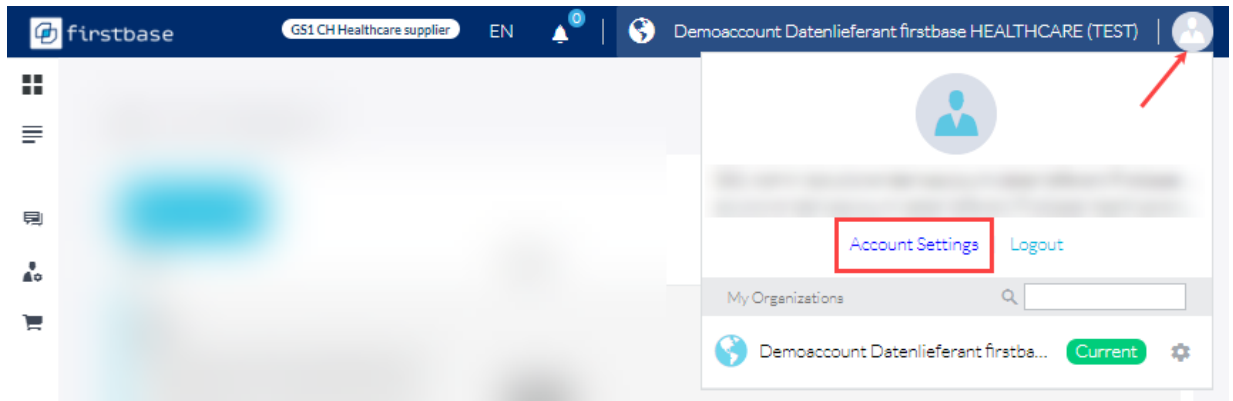


In the menu item "User Data" you can change your profile picture, your name, and your password.
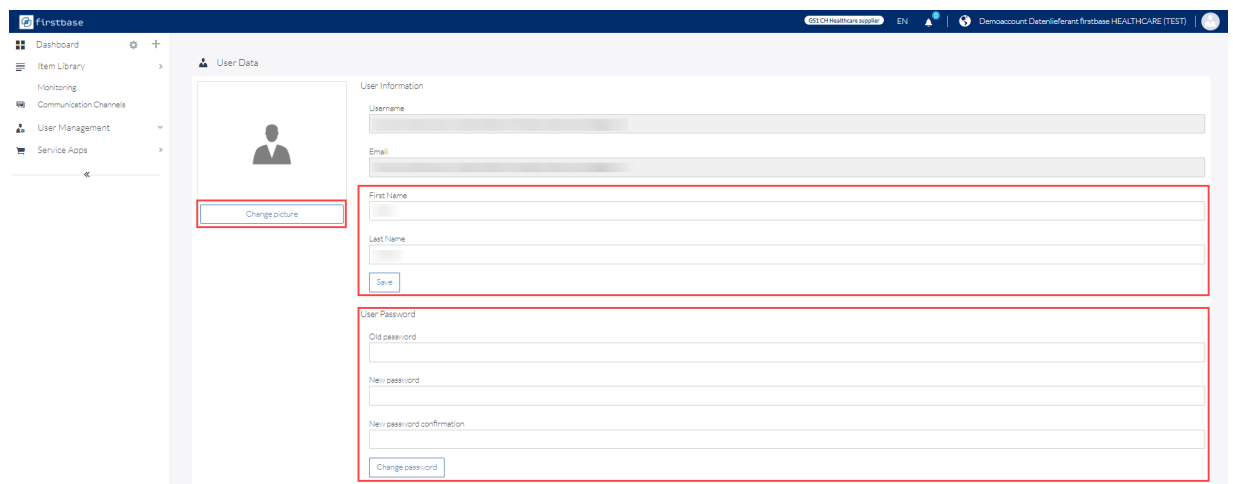


*Figure 19: Account view*

## 11.1    Change password

You can change your password by entering your current password in the first field. This is a mechanism to prevent misuse of the function. Then enter your new password in the second field and confirm it in the third field.

# 12 Contact details

Do you have any questions about using the firstbase healthcare data exchange platform?

Our support team will be happy to assist you with any questions or uncertainties you may have.

To be able to guarantee you fast and efficient support, please describe the issue as precisely as possible. Ideally with screenshots (images).

**We will be happy to assist you personally during the following times:**

Monday to Friday

Between 8-12 h and 13 - 17 h

E-mail: *solutions@gs1.ch*

Tel. +41 58 800 78 00