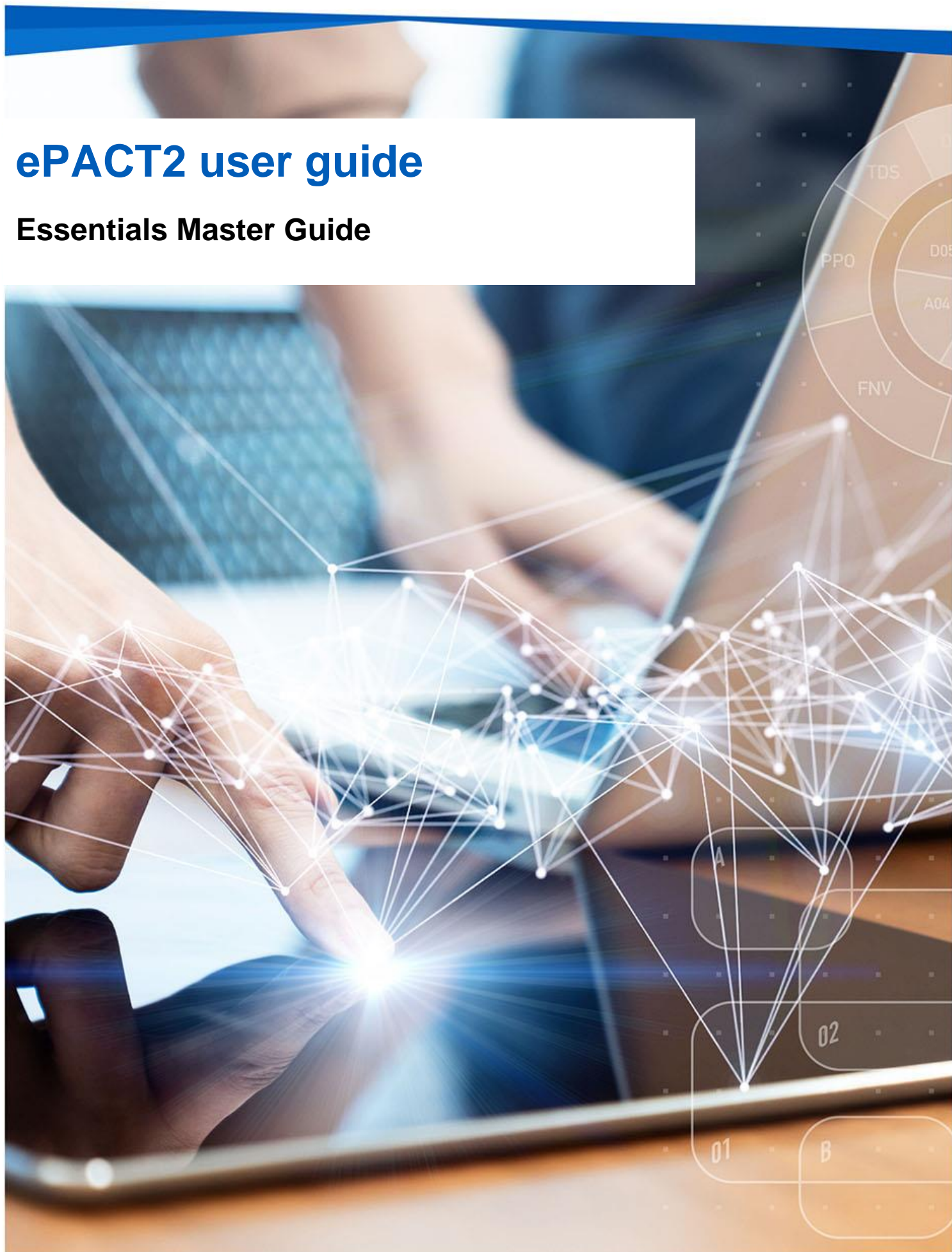


ePACT2 user guide

Essentials Master Guide



Interactive Contents

Use this interactive contents list to jump straight to the content you want to see. Just click the titles below to go directly to that section:

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Logging into ePACT2

Activating your account

Signing in

Understanding the Landing page

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Understanding the Home Page

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Selecting a dashboard page

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Using a Report Template

Using the Catalog

Using Quick Search

Completing the Quick Search criteria

Building an Analysis

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Saving, Printing and Exporting Analysis

Re-using and editing saved reports and analysis

Sharing ePACT2 content with other users

Archiving and Un-archiving

Setting up your favourites

Account Settings

Getting more help

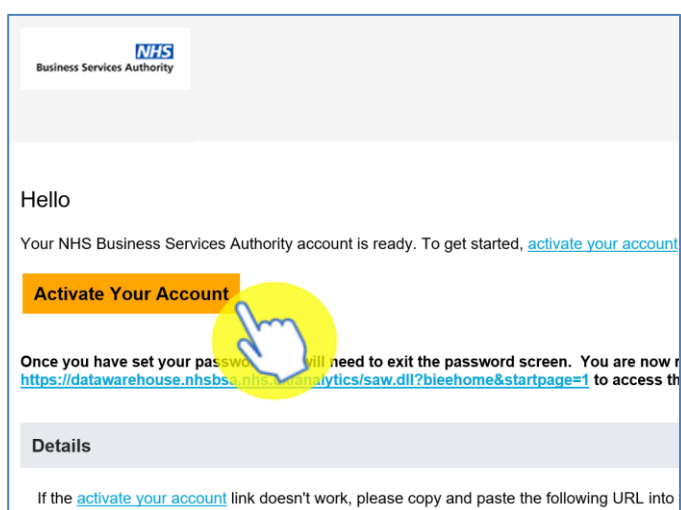
Logging into ePACT2

Activating your account

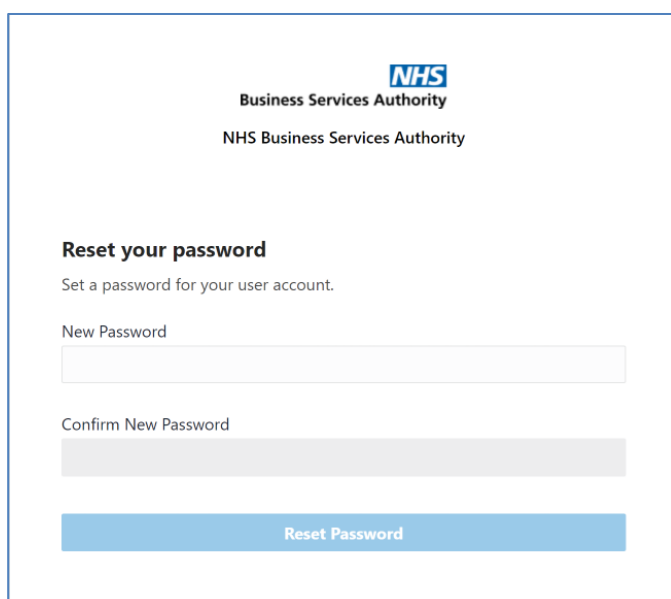
Once you are registered for the system your account must be activated and password and security question details set to allow you to access the system.

An email will be sent containing account details and a link to the system.

1. Click the link to activate your account.



2. Create a password.

A screenshot of the 'Reset your password' form in the NHS Business Services Authority system. The header includes the NHS logo and the text 'Business Services Authority' and 'NHS Business Services Authority'. The main heading is 'Reset your password' followed by the instruction 'Set a password for your user account.' There are two input fields: 'New Password' and 'Confirm New Password'. Below the input fields is a blue button labeled 'Reset Password'.

3. Click 'Reset' password.

Business Services Authority
NHS Business Services Authority
nhsbsa.epact2training@nhs.net

Reset your password
Set a password for your user account.

New Password
.....

- The password must have at least 12 characters.
- The password cannot exceed 40 characters.
- The password cannot contain the First Name of the user.
- The password cannot contain the Last Name of the user.
- The password cannot contain the user name.
- The password must have at least 1 lowercase characters.
- The password must have at least 1 uppercase characters.
- The password must have at least 1 numeric characters.
- Cannot repeat last 4 passwords

Confirm New Password
.....

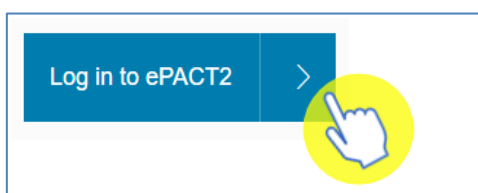
Reset Password

4. You will be notified of the password change success.



Signing in

1. Once account set up is complete, to sign into the system, navigate to the NHSBSA ePACT2 webpage to access the system: <https://www.nhsbsa.nhs.uk/epact2>
2. Click on 'Log in to ePACT2'.



3. You will be taken to the sign in page for your ePACT2 account.
4. Enter your email address in the 'User Name' box and your password in the 'Password' box.

ORACLE Cloud
nhsbsa180601
Oracle Cloud Account Sign In

User Name
myemail@nhs.net

Password
.....

Sign In

Need help signing in? [Click here](#)

1) User Name	Enter the email address your account is registered under
2) Password	Enter the password for your ePACT2 account

5. Click 'Sign in'.

ORACLE Cloud
nhsbsa180601
Oracle Cloud Account Sign In

User Name
myemail@nhs.net

Password
.....

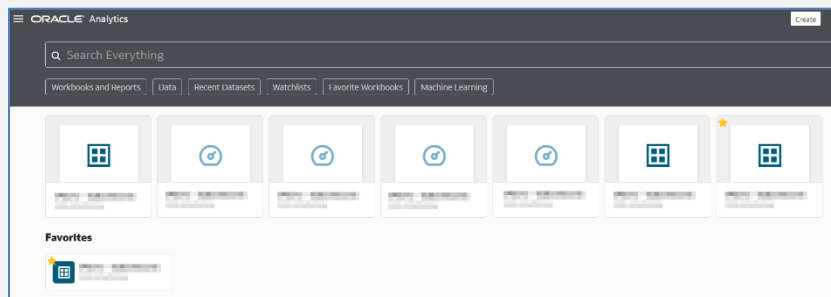
Sign In

Need help signing in? [Click here](#)

Cookie Preferences

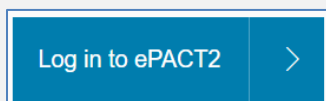


Please be aware when you sign out of ePACT2 and then sign back into the system without closing your browser, it will take you to the oracle sign in page:



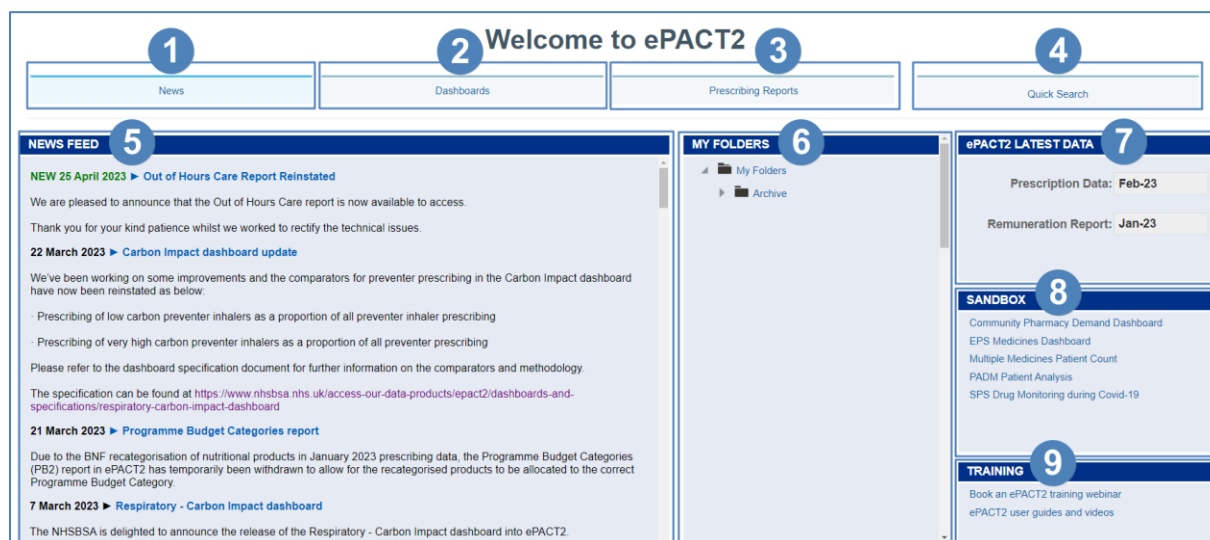
To ensure you always sign into the correct system:

1. Close and then reopen your browser.
2. Then use your bookmarked link or navigate to sign in from the ePACT2 webpage: <https://www.nhsbsa.nhs.uk/epact2>
3. Click on 'Log in to ePACT2'.



Understanding the Landing page

When you sign into ePACT2 you will be taken to the landing page, the landing page enables you to quickly select the part of the system you would like to view:

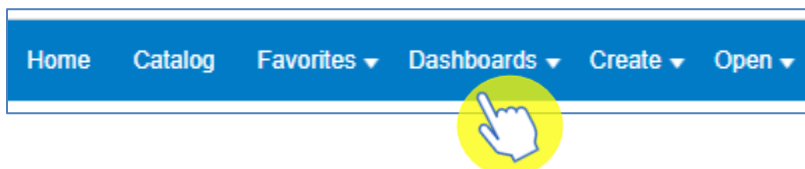


1. **News** – You start off on the 'News' page. If you select a different part of the landing page, to get back to the original page, click on 'News'. The news page contains the News feed, ePACT2 latest data, the Sandbox and Training section.
2. **Dashboards** - You can select this tab to view all available dashboards.
3. **Prescribing Reports** - You can select this tab to view all available prescribing reports.
4. **Quick Search** – A prebuilt report which allows you to quickly interrogate the data for a selected time period, organisation and drug set for a number of pre-set fields. Access is dependent on your organisation type user permissions.
5. **News Feed** - The News feed will display the latest news for ePACT2, it will keep you up to date when new reports are released, and if there is anything important you should know about the system.
6. **My Folders** – You can quickly access any saved content you may have created. Access is dependent on your organisation type user permissions.
7. **ePACT2 Latest Data** - This section informs you of the latest month's data that is available within the system and the latest month's remuneration report.
8. **Sandbox** - Here we put the content we are currently developing for the system. We would love it if you could take a look at any of the reports available in here and then let us know what you think by using the feedback option in the reports.
9. **Training** – From here you can access the training materials available on the website or book a webinar session or one to one online training.

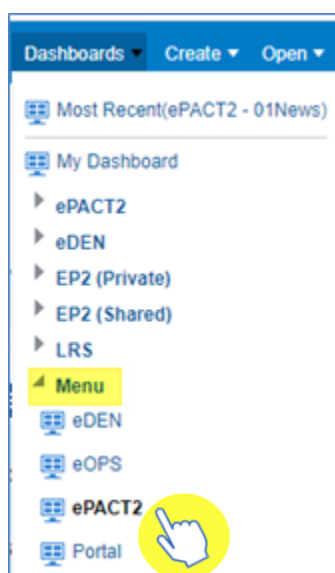
Navigating the system

If you wish to navigate back to the landing page after you have viewed other ePACT2 content:

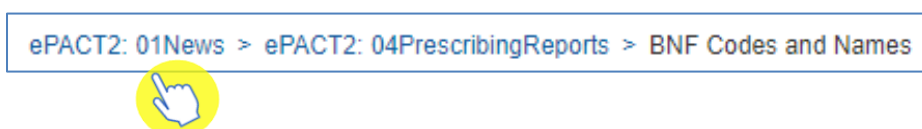
1. From the 'ePACT2' toolbar select 'Dashboards'.



2. From the available list select 'Menu' and 'ePACT2'.

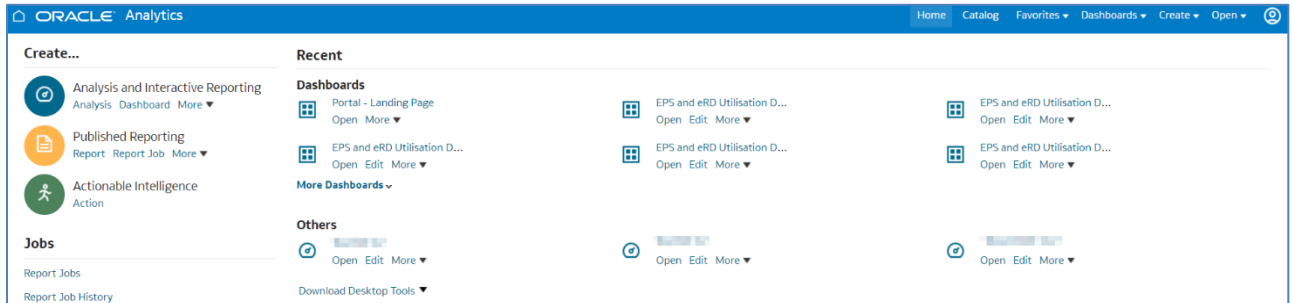


3. Alternatively, use the breadcrumb trail at the bottom of any page by selecting 'ePACT2: 01News'.



Understanding the Home Page

If you select the 'Home' icon from the 'ePACT2' toolbar you will be taken to the system homepage:



The system home page will display the most recently accessed dashboards.

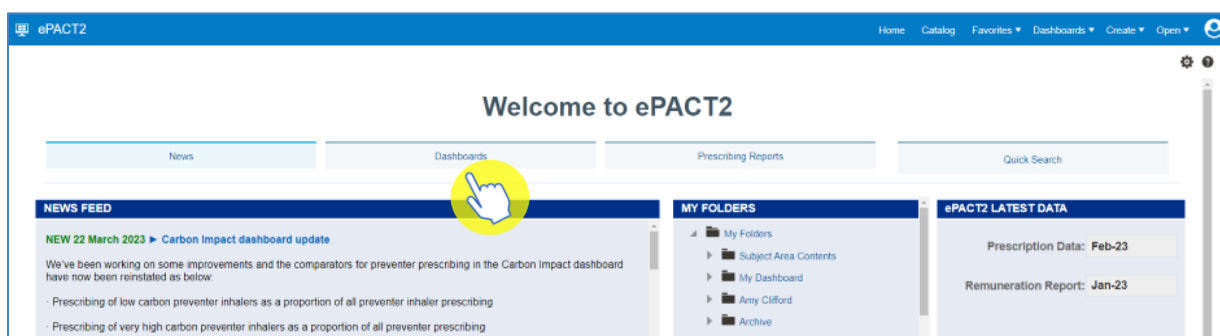
Accessing the Dashboards

The system provides easy-to-use analysis, reports and dashboards, supporting patient safety, improving patient outcomes and medicines optimisation. Data contained within the system includes dashboards supporting the Medicine Value Programme such as:

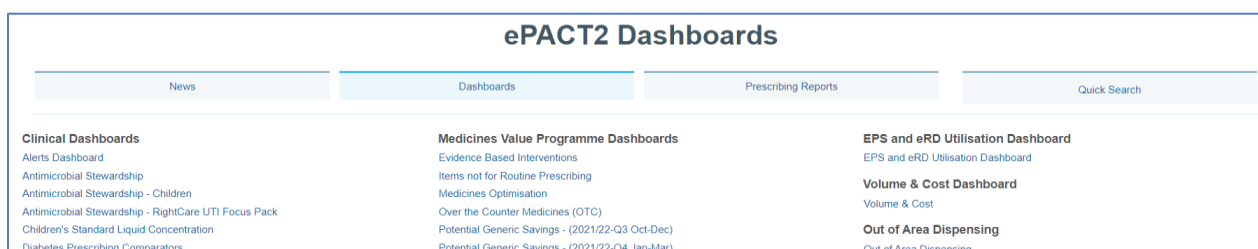
- Medicines Safety
- Medicines Optimisation: Polypharmacy
- Antimicrobial Stewardship
- Medicines Optimisation: Generic Prescribing
- Items which should not be routinely prescribed in primary care
- Electronic Prescribing Service Utilisation
- Volume & Cost
- Respiratory Prescribing

Detailed information and specifications of the dashboards are listed here: <https://www.nhsbsa.nhs.uk/epact2/epact2-dashboards specifications>

1. To access the dashboards from the Landing page select the 'Dashboards' icon:



2. You will then navigate to the dashboard page which will display all available dashboards, from here select the blue link for the dashboards you wish to view.

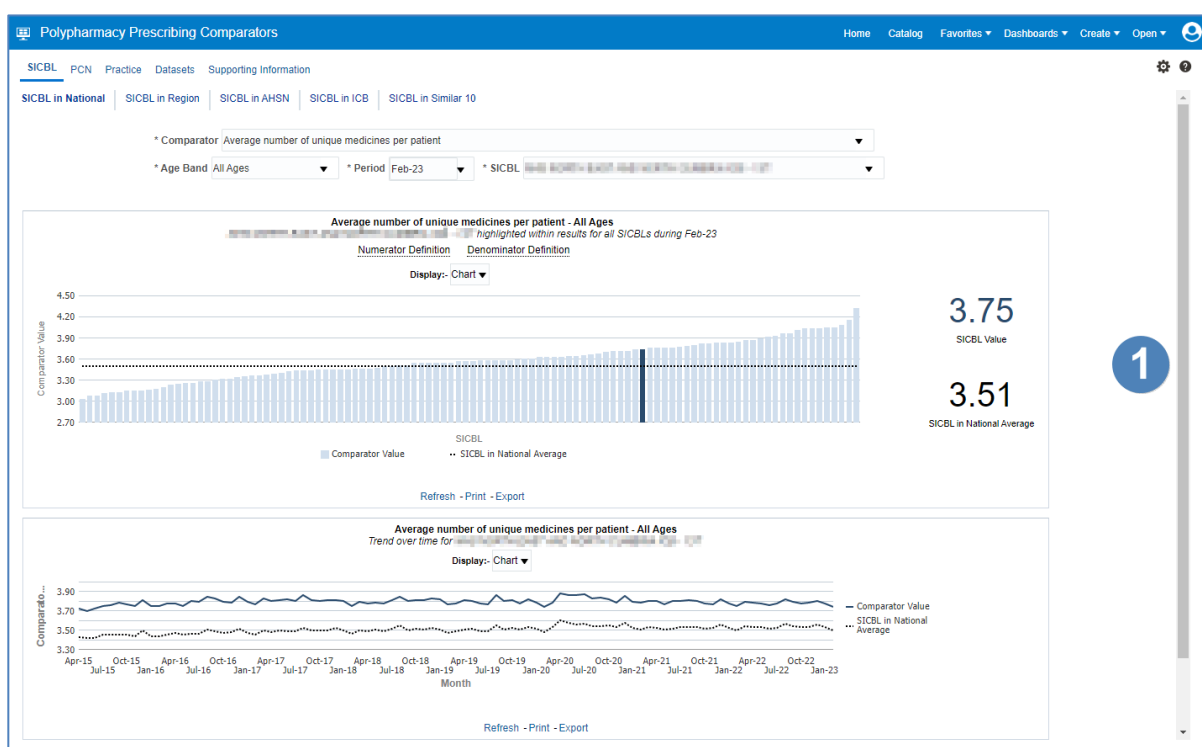


Navigating the Dashboards

All dashboards provided by the NHSBSA operate in a similar way. For the purposes of the guide the 'Polypharmacy Prescribing Comparators' dashboard will be used, however, the functionality is uniform across the dashboards.

Selecting a dashboard page

1. You may need to use the scroll bar to view the entire dashboard.



2. A selection of links will be available to allow you to navigate across different organisation levels of the dashboard. Select the link for the area of the dashboard you would like to view.
3. You can then choose between different sub-tabs.



4. The dashboard will then generate according to the options selected.

Dashboard Criteria Selection

1. The Dashboards have a range of criteria options to allow you to select the data you want the dashboard to show. The options available to select will change depending on the dashboard you are viewing.

Polypharmacy Prescribing Comparators

SICBL PCN Practice Datasets Supporting Information

SICBL in National | SICBL in Region | SICBL in AHSN | SICBL in ICB | SICBL in Similar 10

* Comparator Average number of unique medicines per patient

* Age Band All Ages * Period Feb-23 * SICBL [Organisation Name]



All dashboards will default to show the latest time period available and the organisation the user is registered under. National users will default to the first organisation alphabetically.

2. Select the drop-down arrow to the right of the criteria that you would like to update.
3. Click on the option you want to view from the list.

Polypharmacy Prescribing Comparators

SICBL PCN Practice Datasets Supporting Information

SICBL in National | SICBL in Region | SICBL in AHSN | SICBL in ICB | SICBL in Similar 10

* Comparator Average number of unique medicines per patient

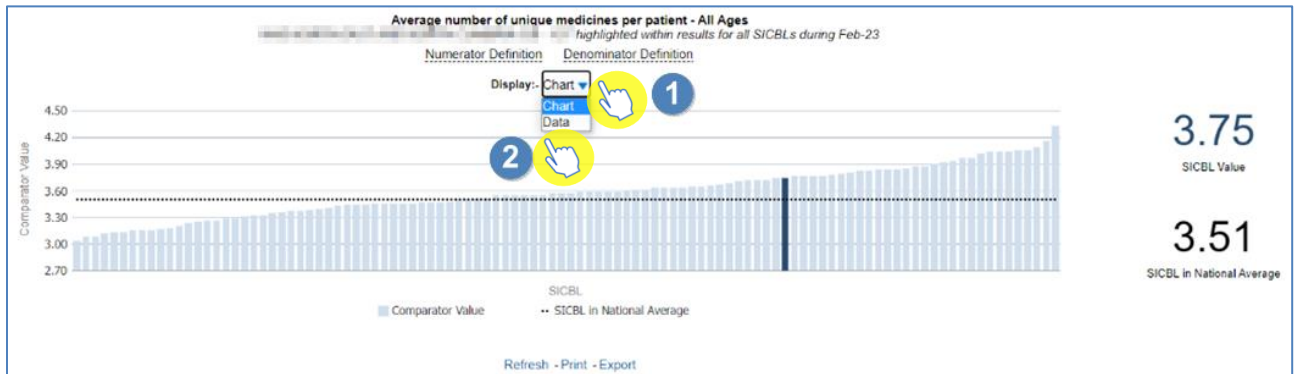
* Age Band All

- ✓ Average number of unique medicines per patient
- Multiple prescribing of anticoagulants and antiplatelet medicine
- Percentage of patients prescribed 8 or more unique medicines
- Percentage of patients prescribed 10 or more unique medicines
- Percentage of patients prescribed 15 or more unique medicines
- Percentage of patients prescribed 20 or more unique medicines
- Search...

4. Once selected the dashboard will automatically update and display the required data.

Data Views

Some reports contained within the dashboard will be available in both 'Chart' and 'Data' formats.

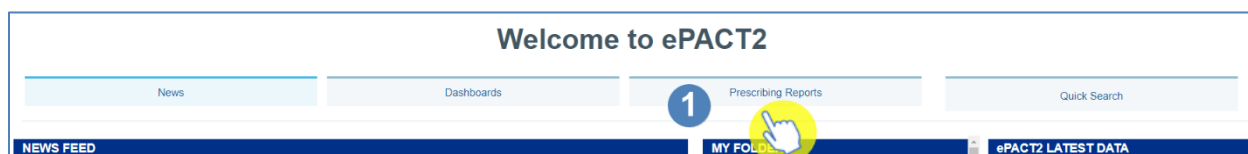


1. Select the drop-down option for the 'Display'.
2. The views available will be displayed to select.

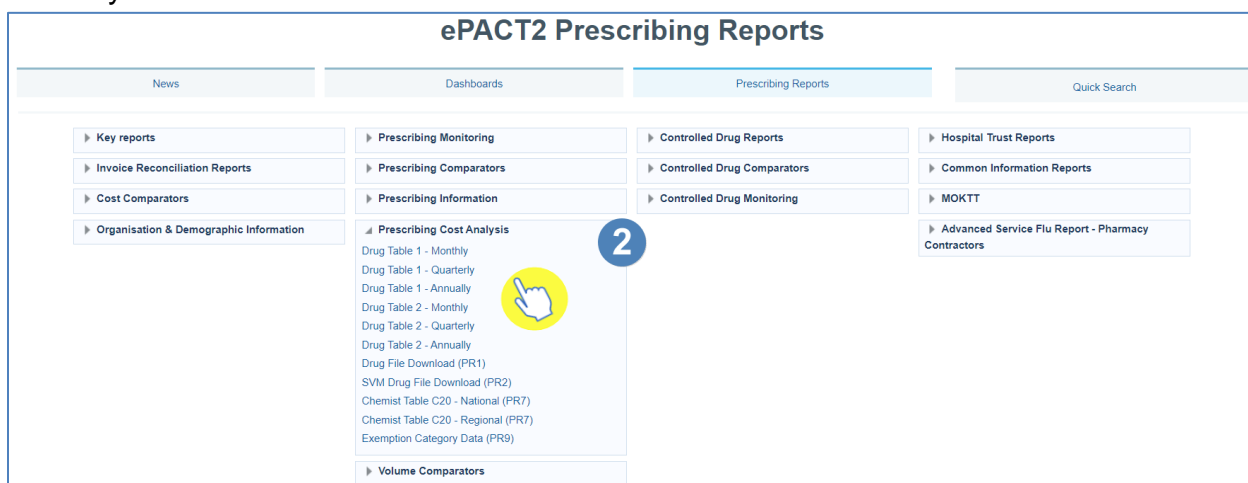
Accessing the Pre-built Reports

The pre-built 'Prescribing Reports' are available in two different formats. 'Standard reports' are available which allow users to access data for a specific prescribing area. There are also 'Report Templates' which allow users to set a more specific, narrowed criteria for the data.

1. From the Landing page select 'Prescribing Reports'.



2. You will then be taken to the 'Prescribing Reports' section, all reports are accessed by expanding the report category and selecting the link for the report you wish to view.



Using a Standard Report

The 'Standard Reports' are visually similar to the dashboard reports, in style and layout and are made up of several tabs/pages, that can be accessed in the same manner as the dashboard reports.

1. Once you have selected a report, select the main Tab/Page you wish to view.
2. Then select the Sub-tab.

Potential Generic Savings

National ICB **Commissioner/Provider** Practice Practices within a Commissioner/Provider Supporting Information

Commissioner/Provider - Quarterly | Commissioner/Provider - Monthly

* QUARTER: Jan - Mar 23 (2 Months) ICB: [ICB Name] * COMMISSIONER/PROVIDER: [Commissioner/Provider Name] Apply Reset

PG1(C1). Potential Generic Savings
Total cost of all drugs prescribed in [ICB Name] in Jan - Mar 23 (2 Months)

Net ingredient cost (£)
12,994,159.85

- The 'Criteria Selection' can then be used to restrict the report to your chosen criteria.
- Select 'Apply' to update the report to return the data for the relevant changes made.

Potential Generic Savings

National ICB **Commissioner/Provider** Practice Practices within a Commissioner/Provider Supporting Information

Commissioner/Provider - Quarterly | Commissioner/Provider - Monthly

* QUARTER: Jan - Mar 23 (2 Months) ICB: [ICB Name] * COMMISSIONER/PROVIDER: [Commissioner/Provider Name] Apply Reset

PG1(C1). Potential Generic Savings
Total cost of all drugs prescribed in [ICB Name] in Jan - Mar 23 (2 Months)

Net ingredient cost (£)
12,994,159.85

- The report will now return the data for the criteria selected, and beneath each of the views in the report there are the options to 'Export' or 'Print' the data from the report.

Potential Generic Savings

National ICB **Commissioner/Provider** Practice Practices within a Commissioner/Provider Supporting Information

Commissioner/Provider - Quarterly | Commissioner/Provider - Monthly

* QUARTER: Jan - Mar 23 (2 Months) ICB: [ICB Name] * COMMISSIONER/PROVIDER: [Commissioner/Provider Name] Apply Reset

PG1(C1). Potential Generic Savings
Total cost of all drugs prescribed in [ICB Name] in Jan - Mar 23 (2 Months)

Net ingredient cost (£)
12,994,159.85

Print - Export

Using a Report Template

The 'Report Templates' are the second type of prescribing reports within the system. These reports will be found within the 'Key Reports' category in the 'Prescribing Reports' section of the system.

- When you open a report, you will be prompted with the report criteria pane. In this pane you must select the criteria you want the report to run for. N.B. – if these prompts/drop-down lists have an '*' (asterisk) then these will require a selection in order for the report to return the data.

1) Month	Enables you to select a time period by using the drop-down option
2) Organisation	Enables you to select an organisation via the drop-down option
3) BNF	Enables you to select something from the BNF via the drop-down option

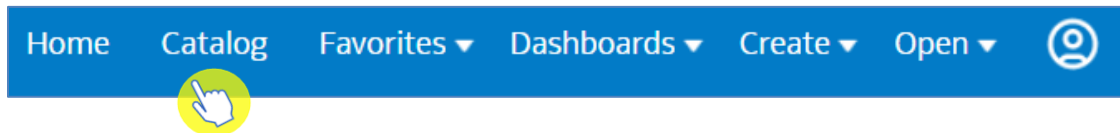
- Once the criteria has been selected then click 'OK' to generate the report:

- After the report has been run with the selected criteria, then a table of data will be returned based on the criteria selected.

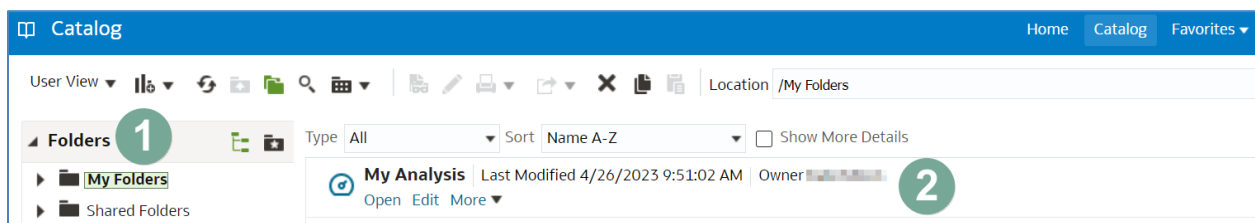
Using the Catalog

The Catalog contains content that you or the NHSBSA have defined and saved for future use.

To navigate to the 'Catalog' select the 'Catalog' icon from the toolbar:



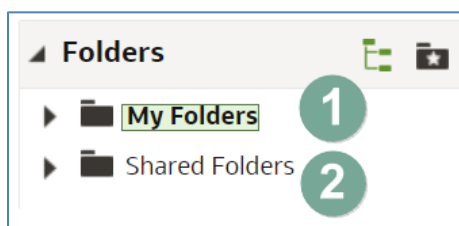
You will then navigate to the ePACT2 Catalogue.



1) Folders	Displays the available folders to open content from
2) Folder contents	When you click on a folder from the menu on the left, the middle pane will show the content of that folder

There are two folders within the 'Catalog':

- 1) My Folders
- 2) Shared Folders



My Folders

The 'My Folders' will contain all saved content for your account, this will include analysis, saved filters, saved groups and saved columns. The 'My Folders' works in the same way as the file structures on your PC you can create, delete and amend sub folders.

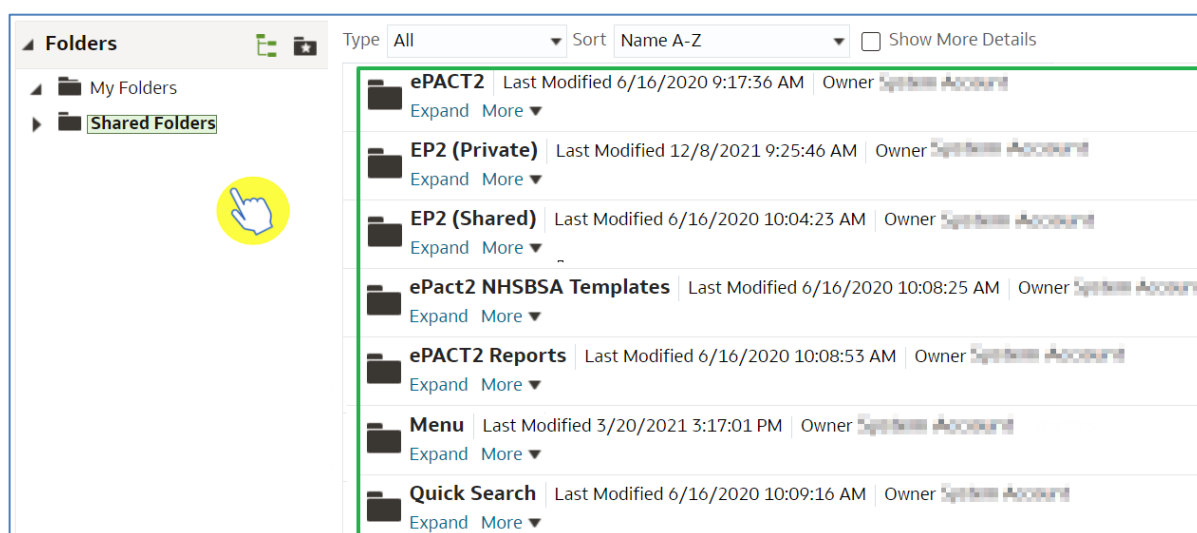
Shared Folders

The Shared Folders contains content created by the NHSBSA such as pre-set reports and filters and can be found in the following folders:

- ePACT2
- ePACT2 NHSBSA Templates
- Quick Search

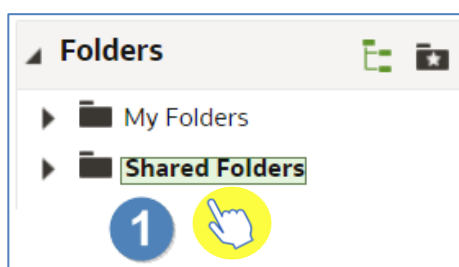
View folder content

To view the content of a folder, click on the folder to highlight, in the middle pane you will then see the content of that folder, such as analysis, filters and sub folders.

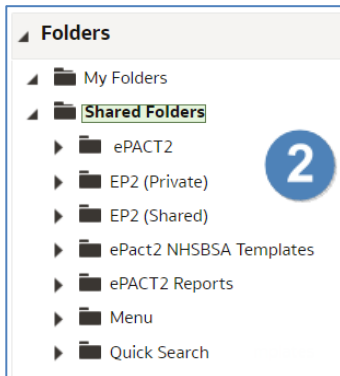


You can expand folders to view the content in two ways:

1. Select the drop-down arrow next to the folder title.

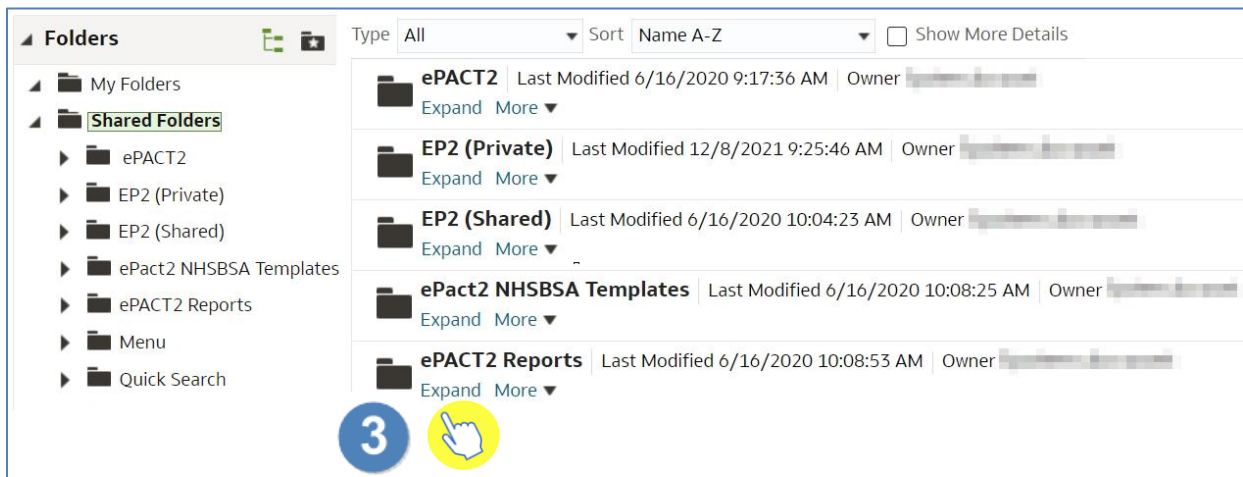


- This will then display the sub folders available within that folder.

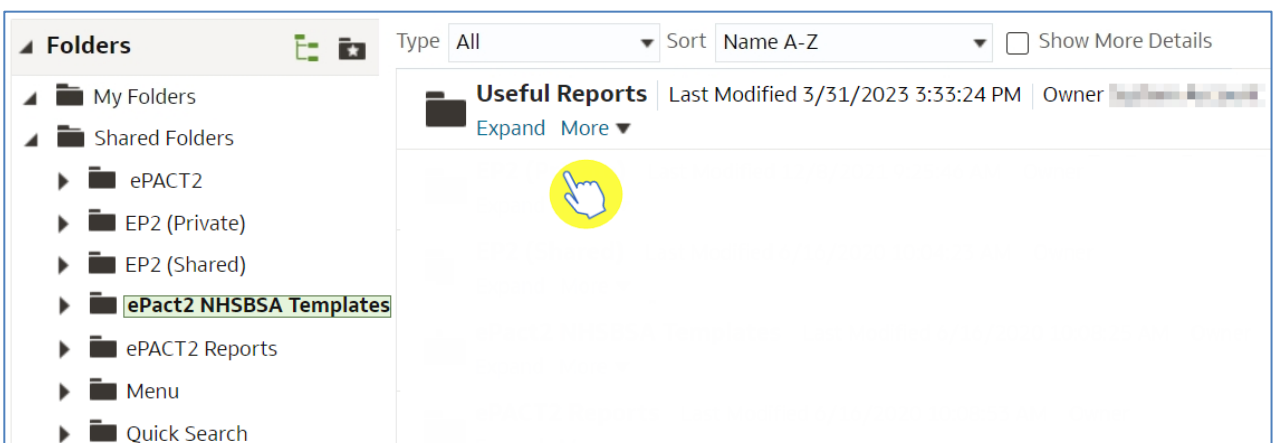


You can also open folders within the folder content pane:

- Select 'Expand' beneath the folder you want to open.



- You will then be displayed with the folder contents.

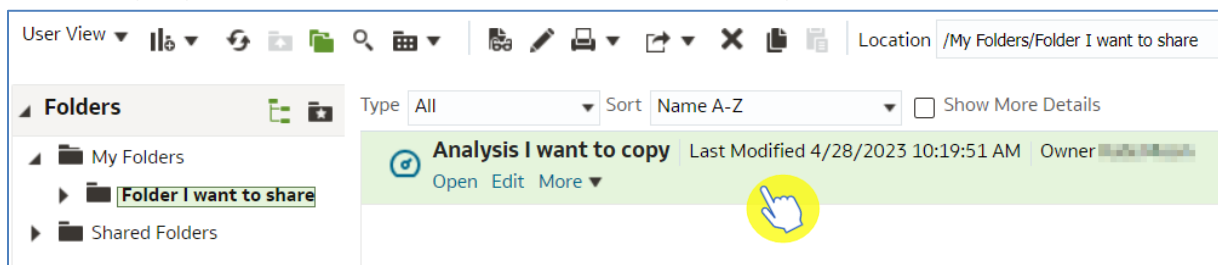


How to copy and paste content

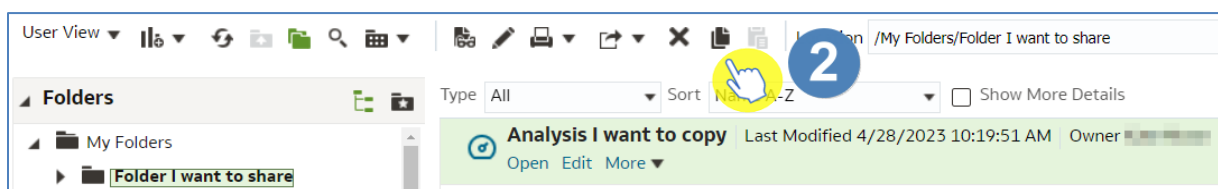
It is possible to copy content from any folder in the 'Catalog' and paste it within your own folder to save/ edit.

If you would like to copy any content, first locate the element you would like to copy, in this example I am copying an analysis, you will use the same function to copy any content, such as filters, save columns etc.

1. Highlight the content you want to copy by clicking on the content box.

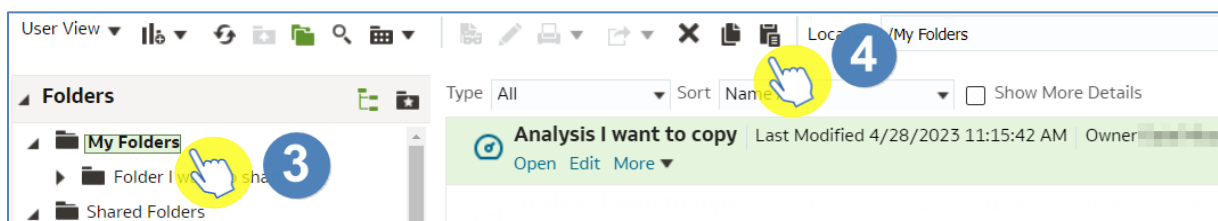


2. Select the copy icon from the 'Catalog' toolbar.

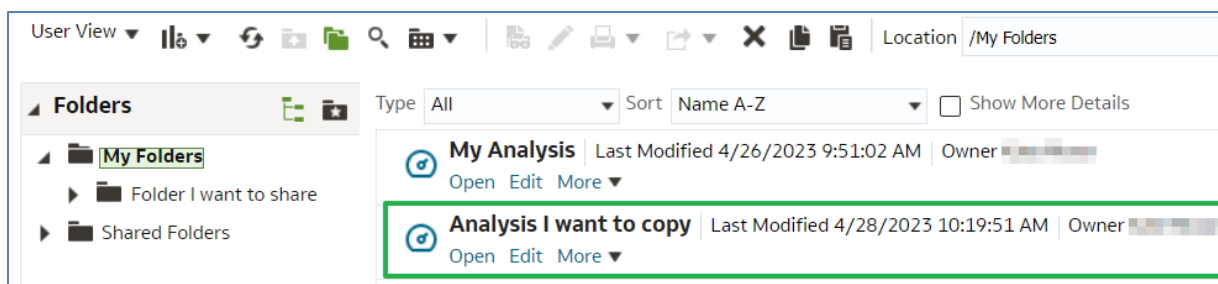


3. Select the folder you want to paste the copied content into.

4. Select the paste icon from the 'Catalog' toolbar.



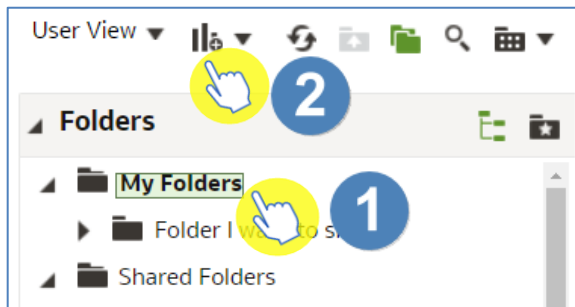
5. The pasted content will now appear in the folder you have selected.



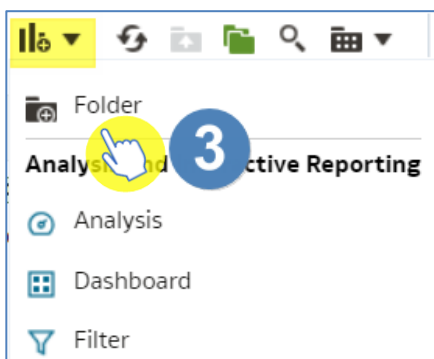
Create a new folder

To create a new folder first select the folder you want the folder to be created in, in this example I am choosing to create a new folder under 'My Folders'.

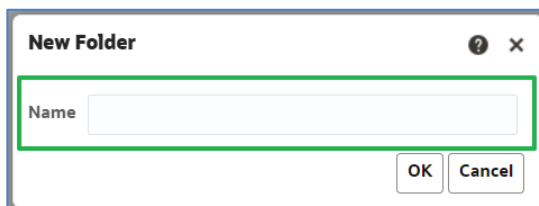
1. Select the location you want the new folder created in, click to highlight.
2. Using the 'Catalog' toolbar select the 'New' drop-down.



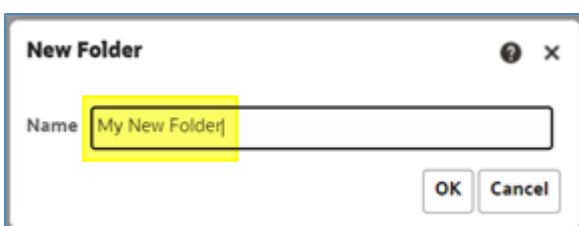
3. Select 'Folder'.



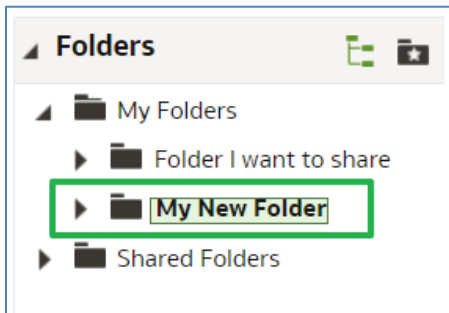
4. Give your new folder a name.



5. Once named select 'OK'.

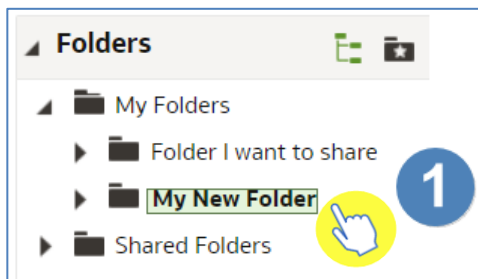


6. Your new folder will now be created:

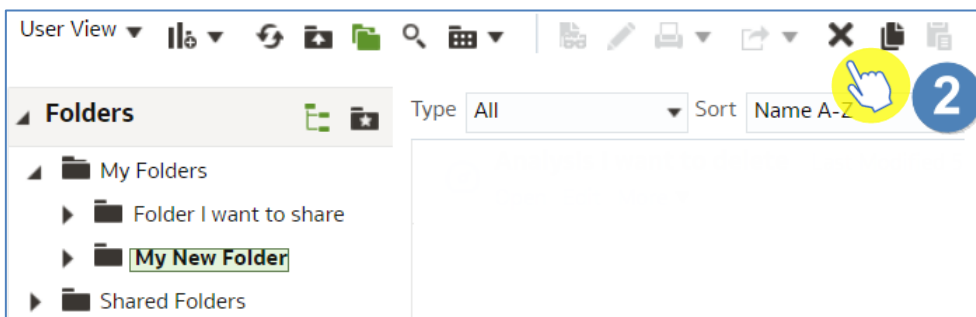


Delete folders

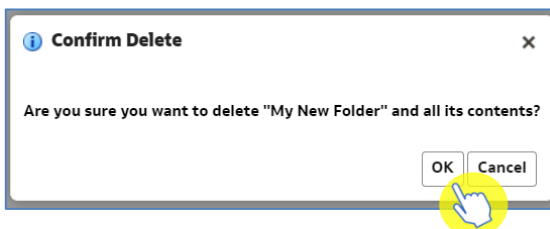
1. To delete a folder first select the folder you want to delete.



2. Using the 'Catalog' toolbar select 'Delete'.



3. You will be prompted with the 'Confirm Delete' box, select 'OK' to action deletion.

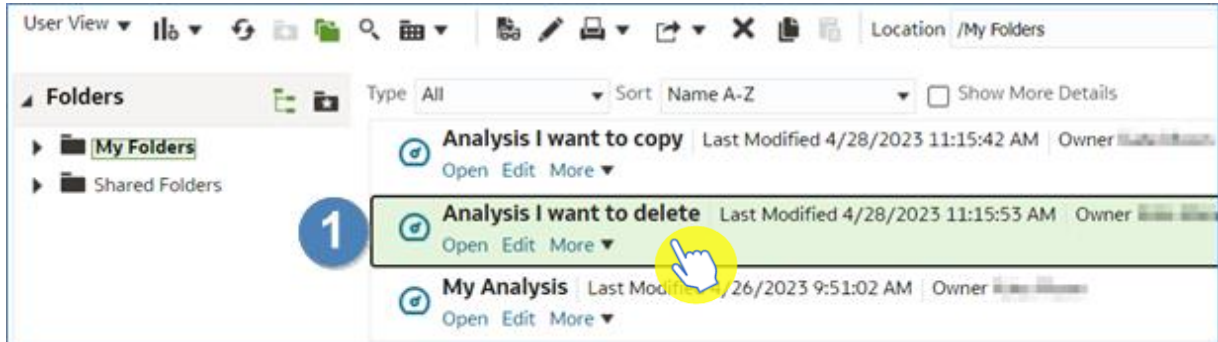


Be aware, when you delete a folder all of the contents will be deleted. It is not possible to retrieve deleted content.

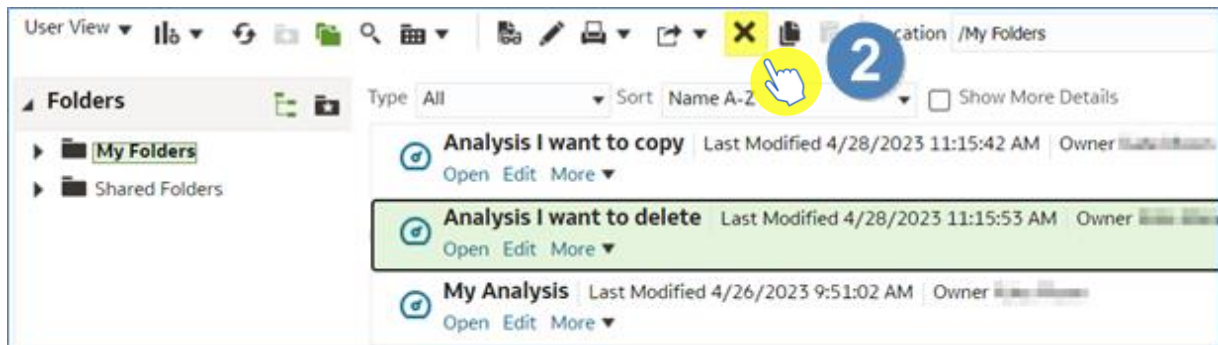
Delete folders content

To delete content of the folder:

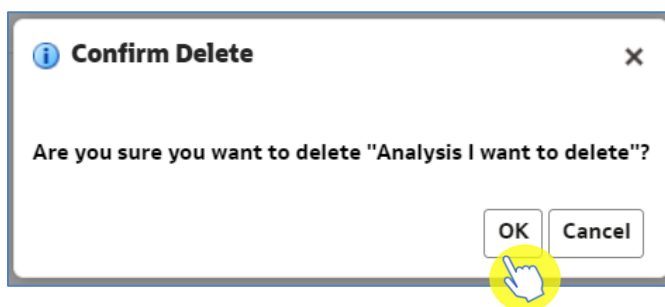
1. Select what you would like to delete.



2. Using the 'Catalog' toolbar select 'Delete'.



3. Select OK to delete.



Be aware, when you delete content of a folder it is not possible to retrieve deleted content.

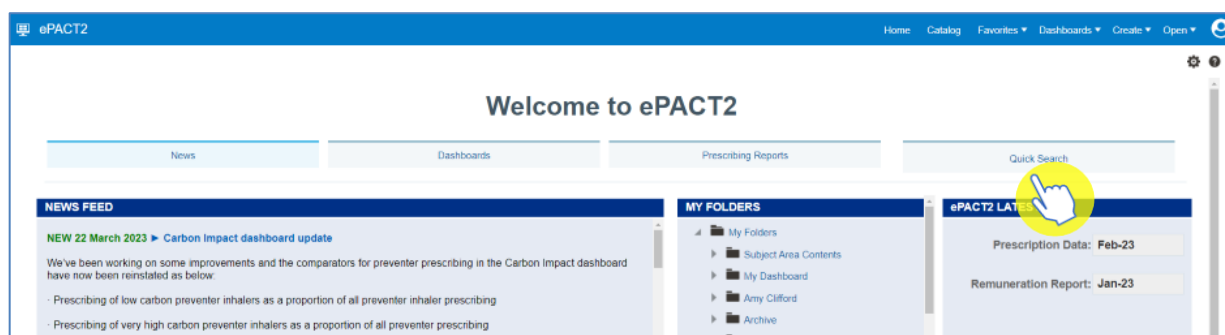
Using Quick Search

The Quick Search analysis is a standard report template and can be found via the landing page.

The report will allow you to quickly return data for a preset selection of fields. The report will be generated for any organisation or BNF level selected by you in the analysis prompts.

The additional benefit of the Quick Search is that you can see the BNF Hierarchy structure when selecting your products.

1. From the 'Landing page' select 'Quick Search'.



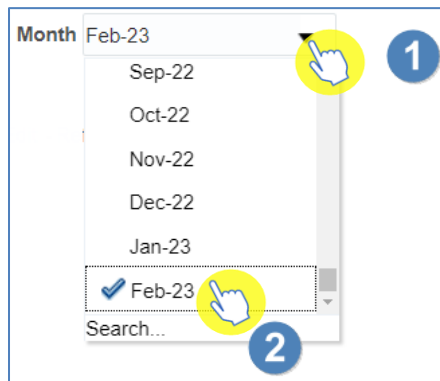
2. The 'Quick Search' will then open in a new tab, and you will be presented with the 'Quick Search' criteria pane.

1) Month	Select the time period you want the report to run for
2) Organisation	Select the organisation you want the report to run for
3) BNF	Select something from the BNF you want the report to run for

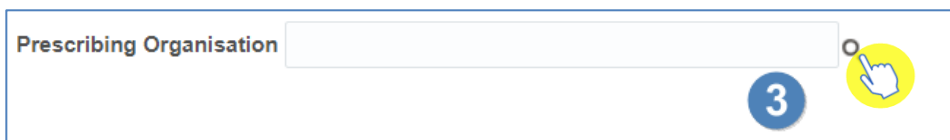
Completing the Quick Search criteria

The time period selected will default to the latest month held in the system.

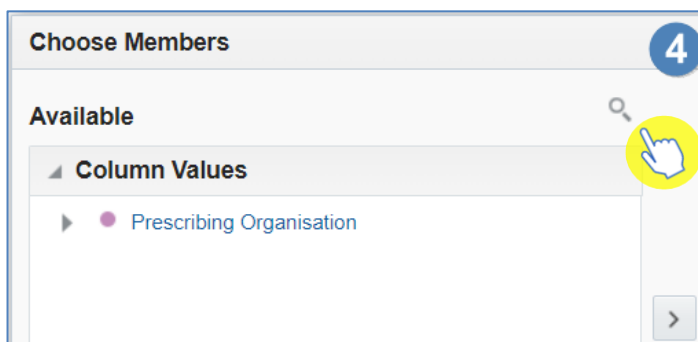
1. To view a different time period, select the drop-down arrow for the time period.
2. Select the time period you require.



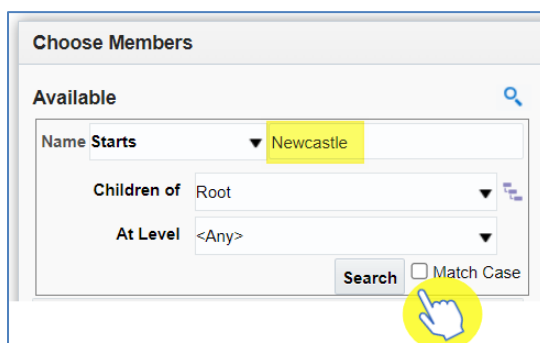
3. Select the magnifying glass icon next to the 'Prescribing Organisation' box.



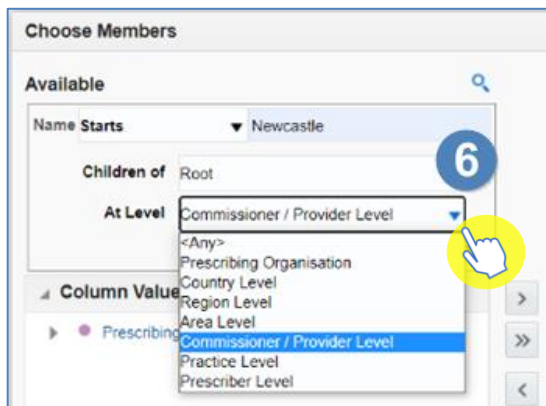
4. Select the magnifying glass icon at the top of the 'Choose Members' box, this will bring up the search function.



5. Type your organisation name into the 'Name' box and untick 'Match Case'.

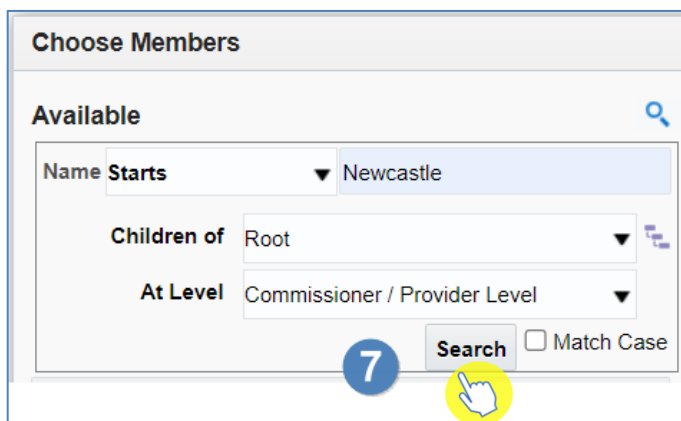


6. Select the drop-down arrow of the 'At Level' box and select the organisation level you wish to search at.



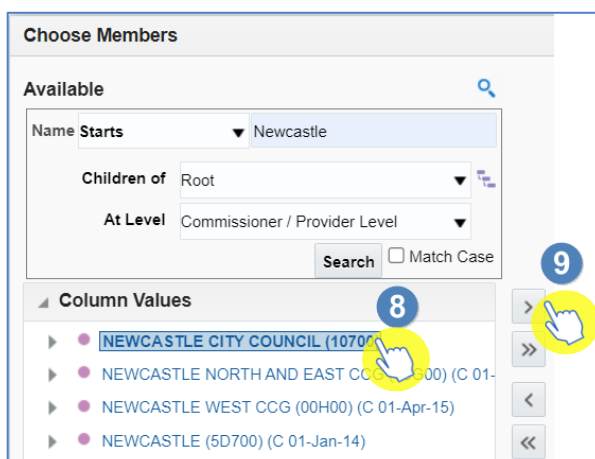
SICB's, Hospital Trusts and ISHP's are held at Commissioner/Provider level. Selecting your organisation level will ensure your results are returned quicker, as the system is only looking for your organisation in this level.

7. Select 'Search' to search for your organisation.



8. Click on your organisation.

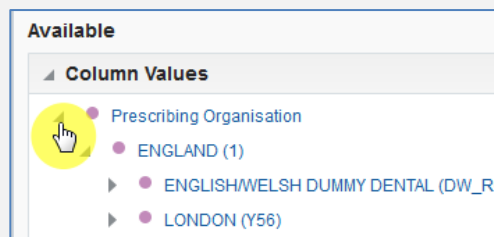
9. Select the single arrow icon.



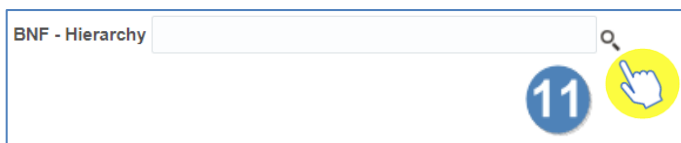
10. Select 'OK'.



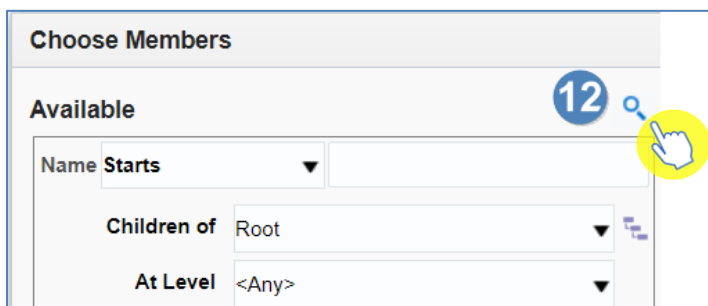
Alternatively, you can navigate to your organisation by selecting on the drop-down arrow titled 'Prescribing Organisation' and navigate down through the organisation structure.



11. Select the magnifying glass for the 'BNF – Hierarchy' box.

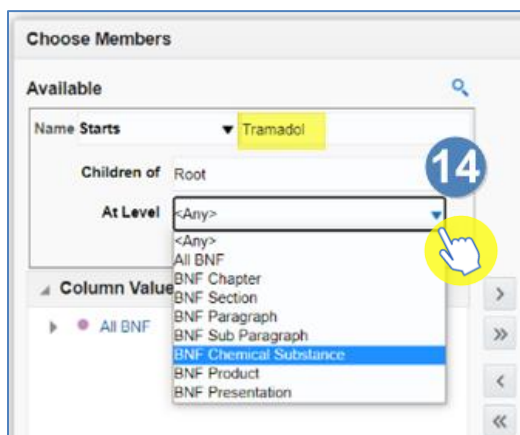


12. Select the magnifying glass icon to bring up the search function.



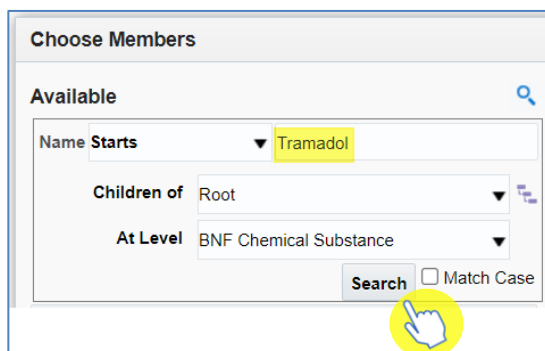
13. Type the name of the drug you are searching for, in this example it is Tramadol.

14. Change the 'At Level' to the level you want to search the BNF for, in this example it is Chemical substance.



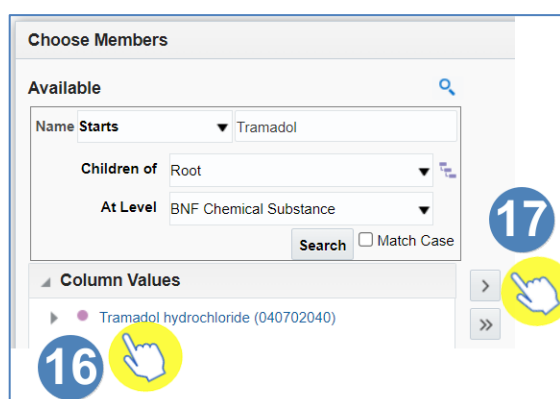
If you do not know the level of the product you are searching for, by leaving the 'At Level' box as 'Any' this will bring back every level of the BNF that contains the name of the drug you are searching for.

15. Untick 'Match Case' and click 'Search'.

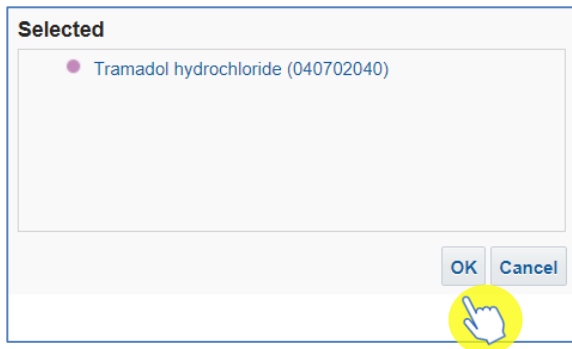


16. Click on the item you want, in this example it is 'Tramadol Hydrochloride (040702040)'

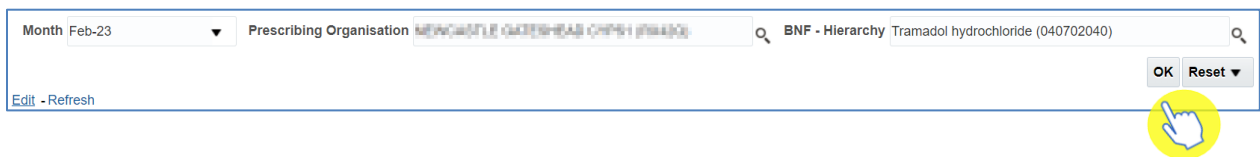
17. Select the single arrow, to move the item to 'Selected'.



18. Click on 'OK'.

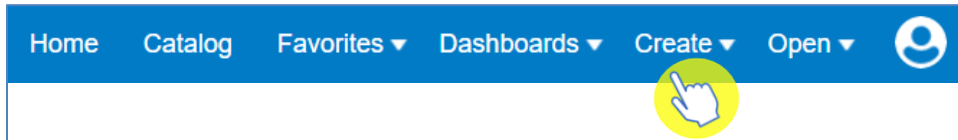


19. Select 'OK', to run the analysis with the selected criteria.



Building an Analysis

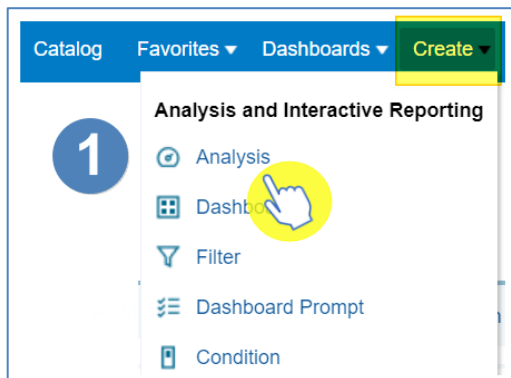
A new analysis can be created by selecting 'Create' from the toolbar at the top of the page.



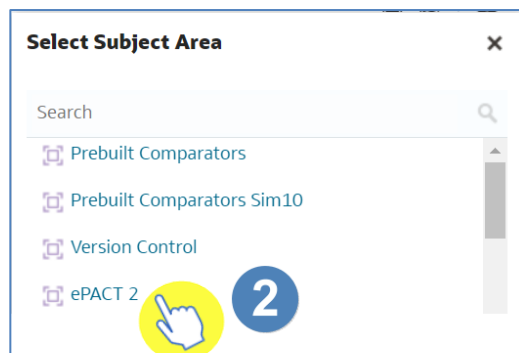
Starting an analysis

Once you have selected 'Create' you will be presented with a list of options.

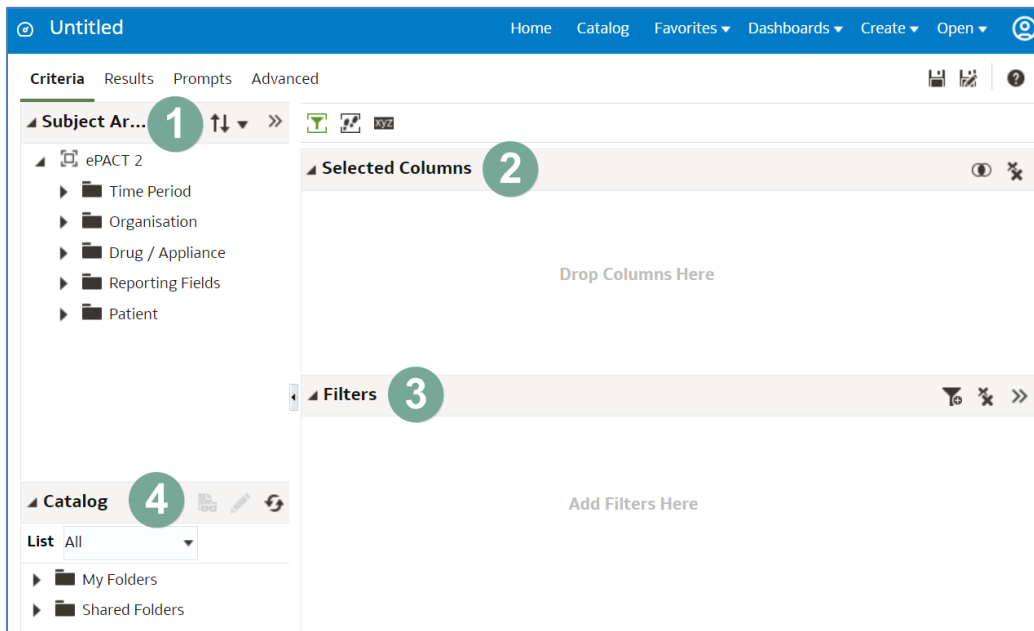
1. From the list provided select 'Analysis'.



2. From the 'Select Subject Area' select 'ePACT2'.



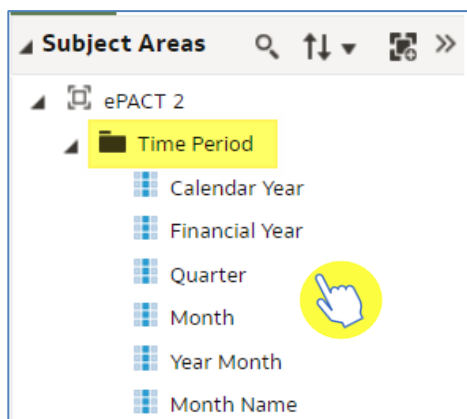
3. The analysis builder will then open.



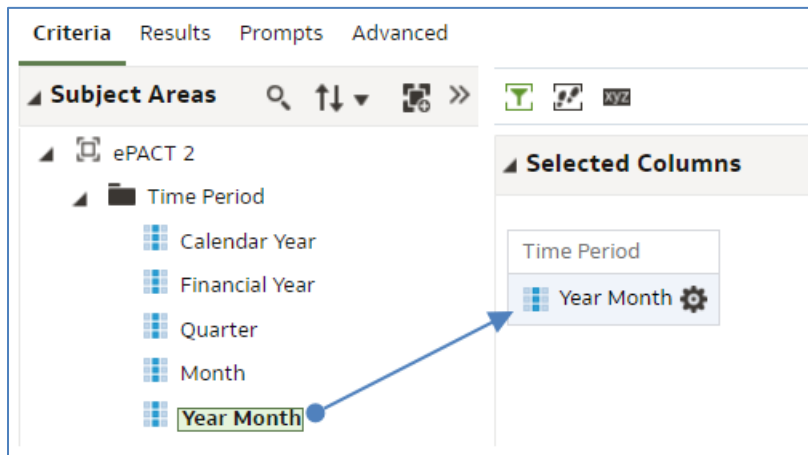
1) Subject Area	From here you can select columns to include in your analysis
2) Selected Columns	This will show the columns of data you will return
3) Filters	The filters applied to your analysis will show here
4) Catalog	From here you can select saved content to include in your analysis

Adding columns to an analysis

- To select columns to include in your analysis, expand the folder you wish to include a column from. For example, to select a time period column first select the drop-down icon from the 'Time Period' folder.
- You will then be presented with a list of available time period columns.



3. There are two ways you can select a column:
- Click on the column you would like to include and drag it into the 'Selected Column' pane.
 - Double click on the selected column.



Please note: the column you include defines the level of data that will be returned. In this example, by entering the 'Year Month' column, this means the analysis will return data monthly. If a 'Quarter' column was included, the data would come back quarterly.



The quickest way to add columns into your analysis is to double click them from the Subject Area folder listing.

Once you have included the columns of data you wish to return, you then need to apply filters to your analysis.



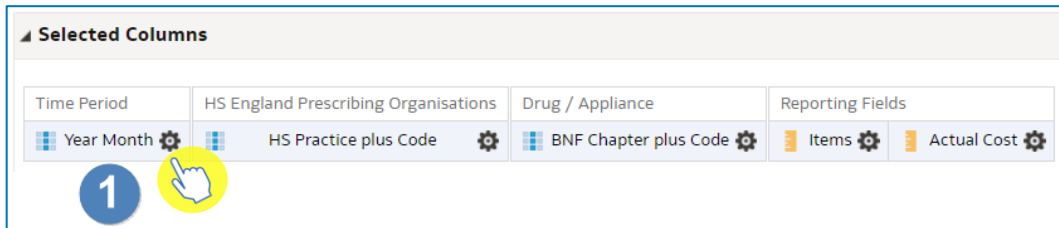
If you did not apply filters, the system would try and bring down all data that the NHSBSA ePACT2 system holds. Filters are what you apply to your analysis to restrict the report to just show the data you require.

Applying filters to an analysis

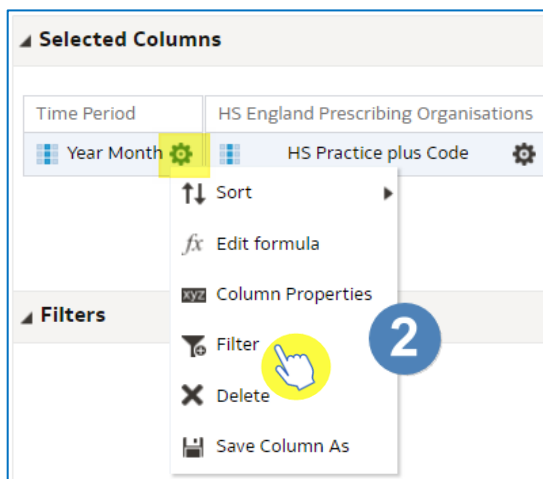
Apply a filter using a column in your report

There are two ways you can apply a filter, the first is to filter on a selected column.

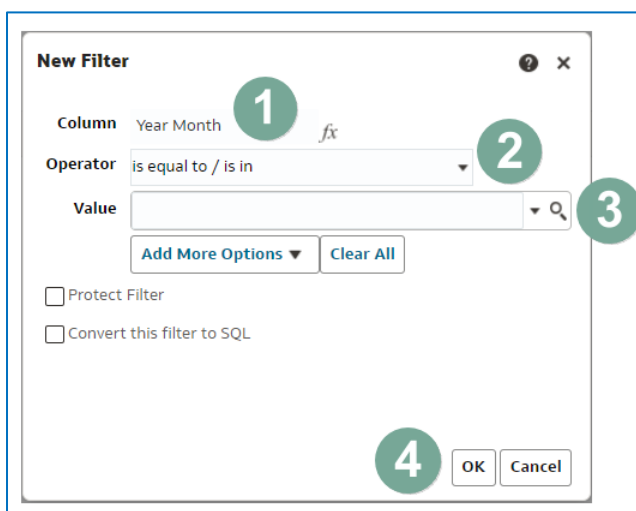
1. Select the cog icon on the column you wish to filter the analysis by.



2. You will then be presented with the column options, from here select 'Filter'.



3. This will open the 'New Filter' pane.



1) Column	Indicates the column you are applying a filter to
2) Operator	This is the condition applied to the filter
3) Value	This is where you select the value you want to filter the column on
4) OK	Select OK to apply the filter to your analysis

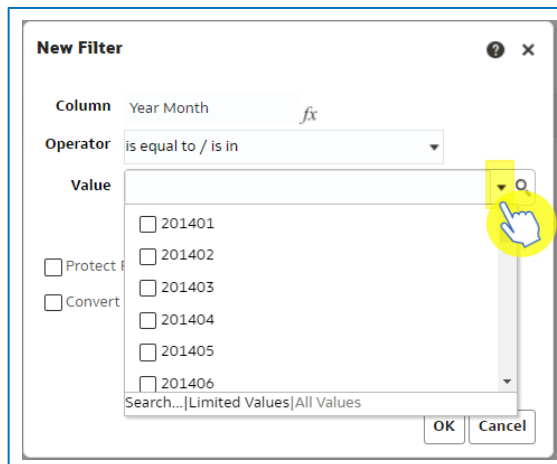


Never type into the value box; you should always select a value by either selecting the drop-down arrow or selecting the magnifying glass.

Selecting a value to filter on

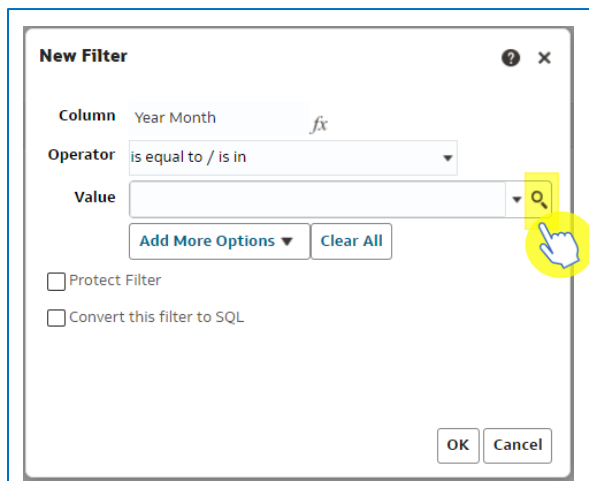
There are two ways of selecting a value to filter on.

1. The first option is to select the drop-down arrow option and pick a value from the available list.

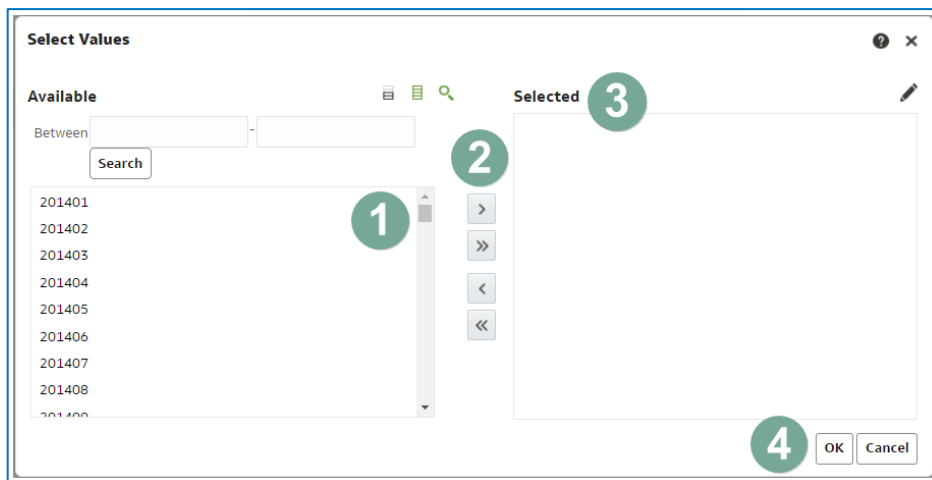


If you select the drop-down this will only display the first 250 values available.

2. The second option is to select the magnifying glass icon.

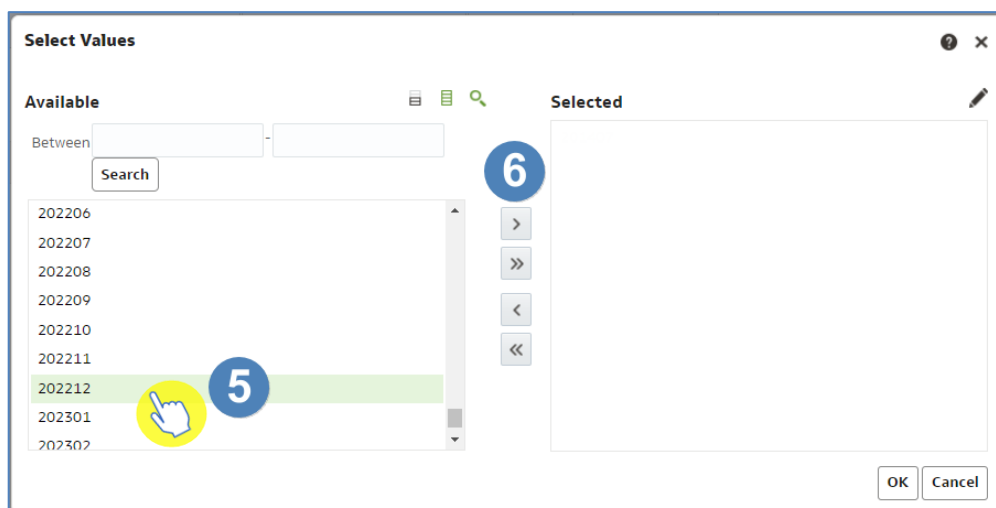


3. Selecting the magnifying glass will bring up the 'Select Values' pane.




1) Available values	The left-hand box displays all available values, you can select a value by clicking on it to highlight the value
2) Arrow icons	The middle icons allow you to move a value to or from the selected box
3) 'Selected'	The values in the selected box are what will be applied to your analysis
4) 'OK'	Selecting 'OK' will action the filter and apply it to your analysis


4. Within the 'Select Values' pane you can select a value by double clicking on it, this will move it from the 'Available' section to the 'Selected' section.
5. Alternatively select the value to highlight it.
6. Select the single right facing arrow icon to move the highlighted value into the 'Selected' section.



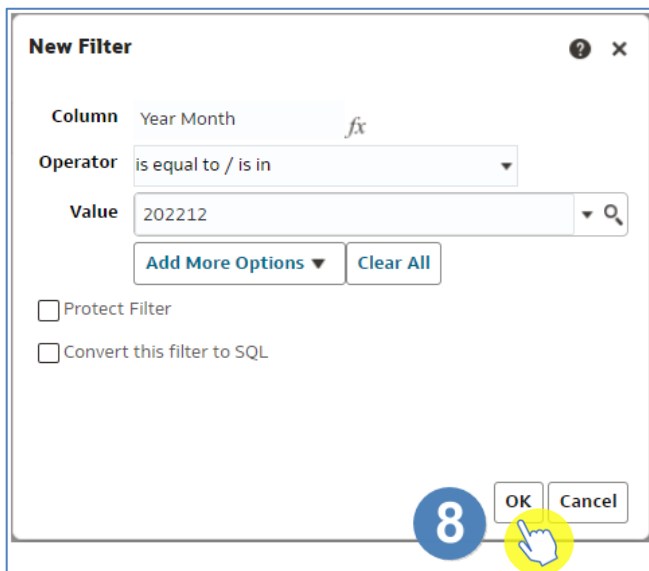
3. Select 'OK' to apply the filter.



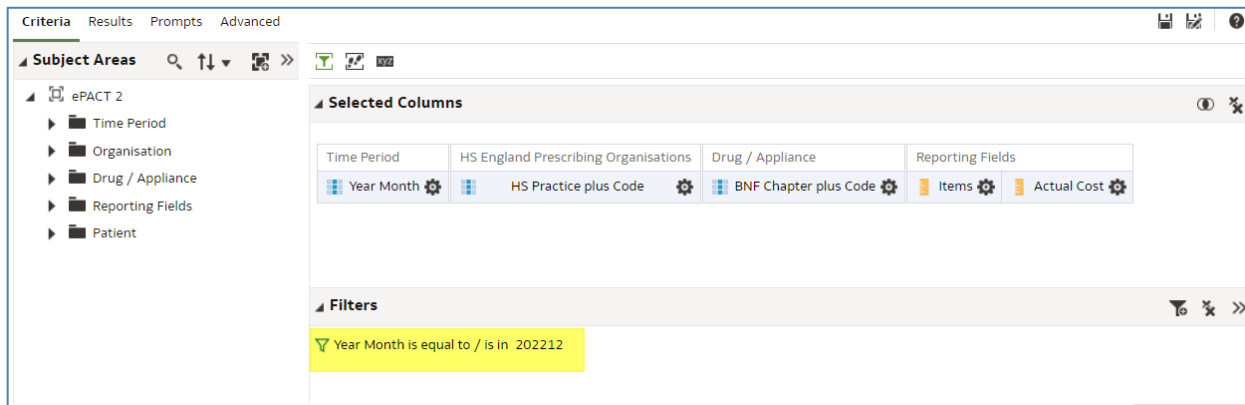
Selecting this icon  will move only the highlighted value.

Selecting this icon  will move all available values.

4. Select 'OK' on the 'New Filter' pane, this pane will show the filter you are about to apply. In this example, it is for the year month being in or equal to 202212 (December 2022).



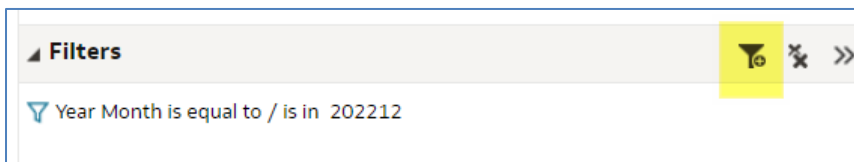
- When you select 'OK' the filter is then applied to the analysis.



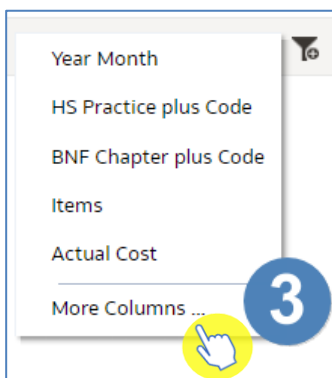
Applying a filter from the filter pane

The second way to apply a filter is by using the filter pane itself.

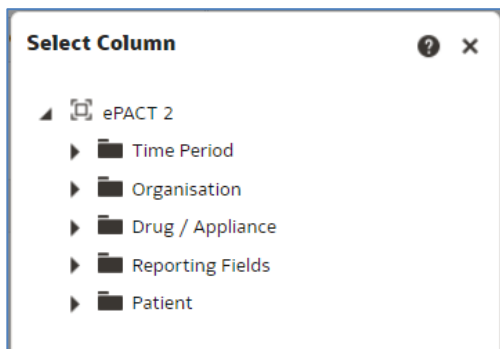
- Within the filter pane select the funnel icon.



- Selecting the funnel icon allows the selection of a column already included in your analysis to apply a filter on, or you have the option for 'More Columns...'
- Select 'More Columns...'



4. You will then be presented with the 'Select Column' list.

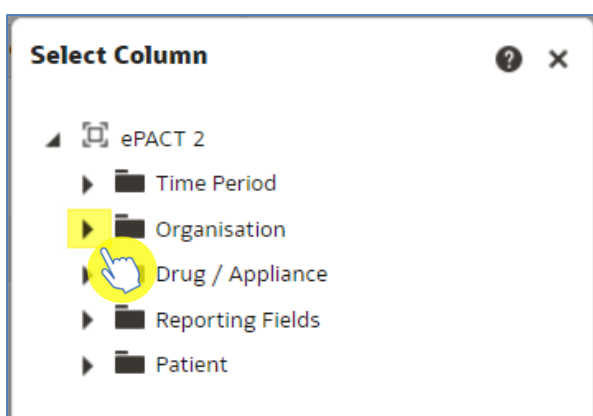


By selecting more columns, you are able to filter the analysis on a column you have not included in your report. For example, in our analysis we have included the 'Practice Plus Code' column. This means the data is coming back at practice level. If I filter on the practice column it is only going to give me the option to find a practice.

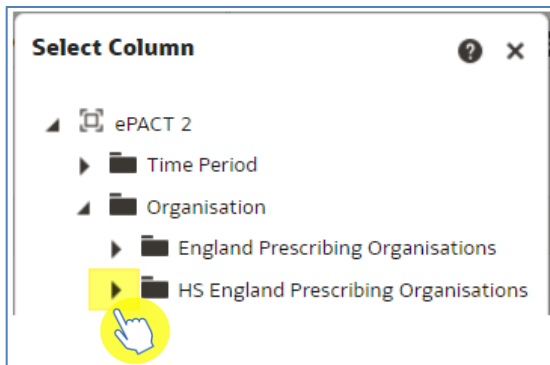
t

Whereas if I want to get data back at practice level for all practices under my SICB I would need to filter on a 'Commissioner provider' column. I do not have a 'Commissioner provider' column in my analysis, but I can pick this column to filter on from the 'More Columns...' option.

5. Select the drop-down option for the appropriate column. In this example we are going to filter the report by SICB by selecting the 'Organisation' folder.

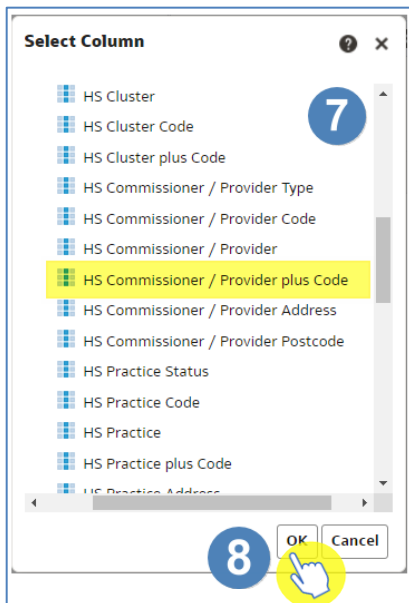


6. Select the drop down for 'HS England Prescribing Organisations'.



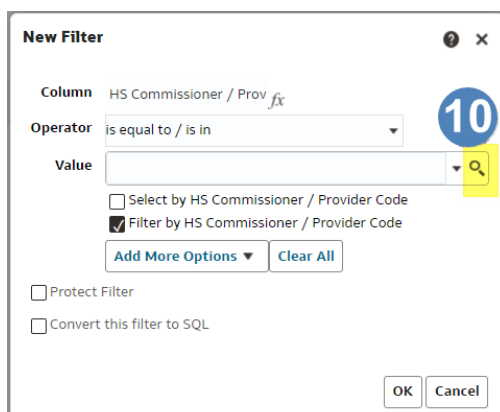
7. Scroll down the list and find the 'HS Commissioner / Provider plus Code' column, click on the column to highlight.

8. Select 'OK'.

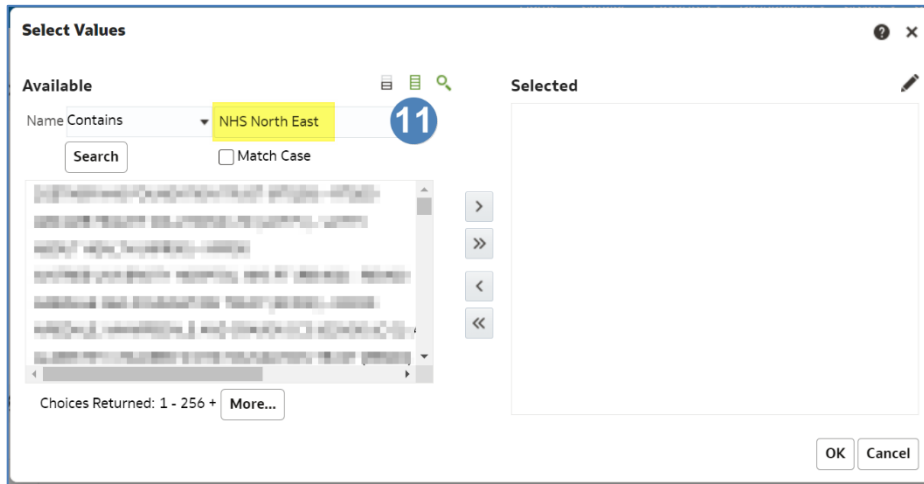


9. You are then presented with the 'New Filter' pane.

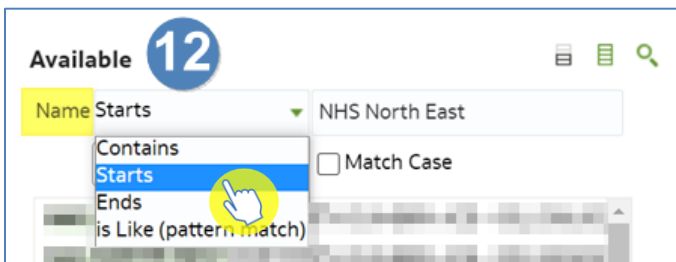
10. Select the magnifying glass icon.



11. In the 'Select Values' pane we are going to search for our organisation. In this example we are going to look for 'NHS North East and North Cumbria ICB'. In the empty search box type 'NHS North East'.



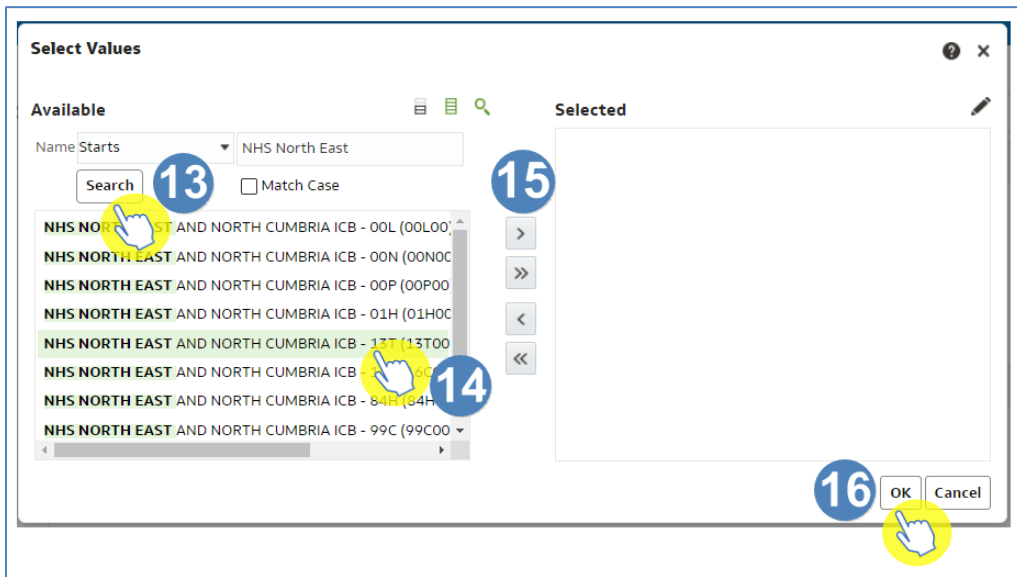
12. In the 'Name' drop-down select the appropriate option. In this example we will leave the operator as 'Starts'.



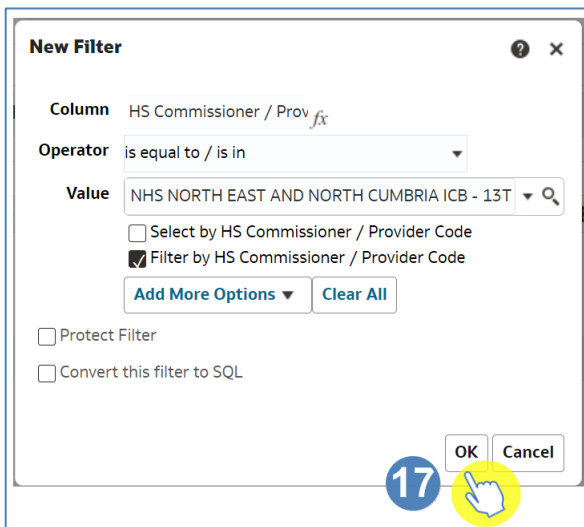
Starts	Will search for a value that starts with the value you have typed in
Contains	Will search for a value that contains the value you have typed in
Ends	Will search for a value that ends in the value you have typed
Is Like (pattern match)	Will search for a value similar to what you have typed

13. Select 'Search' to search the available values for Commissioner / Providers that starts with 'NHS North East'.
14. Select, 'NHS North East and North Cumbria ICB – 13T' to highlight.

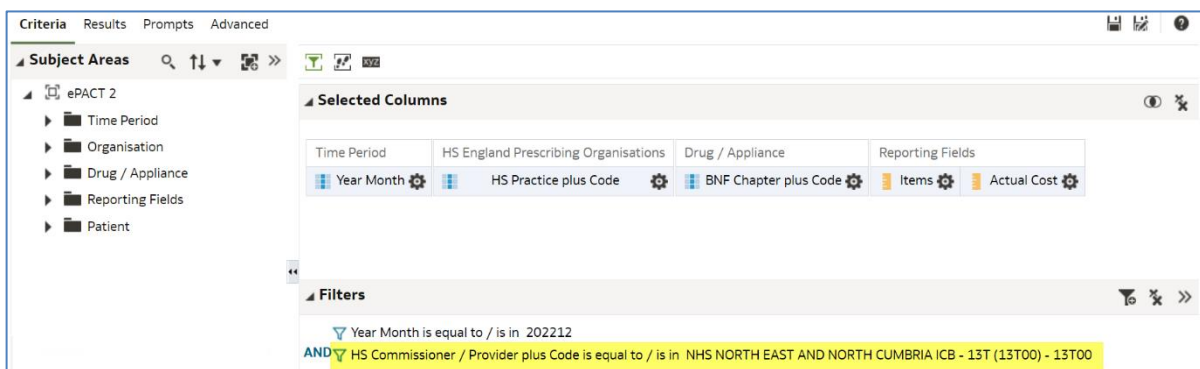
15. Select the single arrow to move to selected.
16. Select 'OK'.



17. Select 'OK' to apply the filter to your analysis.



18. The filters pane will then be populated with your organisation filter.



Running your results

1. Select the 'Results' icon to run your analysis.



In this example we have also filtered on the 'BNF Chapter plus Code' column so the results will return only for 'Chapter 5 Infections'.

2. Your results will return in a table, as per the below image.

Year Month	HS Practice plus Code	BNF Chapter plus Code	Items	Actual Cost
202212	[blurred]	Infections (05)	148	1,551.79
202212	[blurred]	Infections (05)	386	3,314.38
202212	[blurred]	Infections (05)	749	5,127.93
202212	[blurred]	Infections (05)	348	2,454.97
202212	[blurred]	Infections (05)	963	5,685.98
202212	[blurred]	Infections (05)	500	3,985.76
202212	[blurred]	Infections (05)	761	4,460.10
202212	[blurred]	Infections (05)	926	12,466.09

Content paging

7. Select the 'View Properties' icon at the top of your table view.

Compound Layout

Title [A] [edit] [X]

Table [A] [wz] [edit] [X]

1

Year Month	HS Practice plus Code	BNF Chapter plus Code	Items	Actual Cost
202212	...	Infections (05)	148	1,551.79
202212	...	Infections (05)	386	3,314.38

8. You will then be presented with the 'Table Properties'. From here select 'Content paging'.

9. Select 'OK'.

Table Properties [?] [X]

Style Write Back

Data Viewing Fixed headers with scrolling content
 Content paging **2**

Paging Controls Bottom ▾

Rows per Page

Display Folder & Column Headings Only column headings ▾

Null Values Include rows with only Null values

Row styling Enable alternate styling Aa

Duplicate values Repeat in each row

Master-Detail Listen to Master-Detail Events

Event Channels

3 OK Cancel

10. This will then fit your table to the screen, as per the image below.

Table [A] [wz] [edit] [X]

Year Month	HS Practice plus Code	BNF Chapter plus Code	Items	Actual Cost
202212	...	Infections (05)	148	1,551.79
202212	...	Infections (05)	386	3,314.38
202212	...	Infections (05)	749	5,127.93
202212	...	Infections (05)	348	2,454.97
202212	...	Infections (05)	963	5,685.98
202212	...	Infections (05)	500	3,985.76
202212	...	Infections (05)	761	4,460.10

Saving, Printing and Exporting Analysis

Save your analysis

Once you have your results it is possible to save your analysis to re-open in the future.



When you save an analysis within the system, you are not saving the results data, you are saving the criteria that brought back those results. This means you are not saving large amounts of data and therefore there is no limit to the amount of content you can save.

1. To save your analysis, select the 'Save' or 'Save As' icon in the top right-hand corner of your results pane.

Year Month	Items	Actual Cost	Practice plus Code
202301	1,043	6,247.78	Practice plus Code
202301	11	43.23	Practice plus Code
202301	529	4,123.47	Practice plus Code
202301	659	4,683.17	Practice plus Code
202301	848	5,563.73	Practice plus Code

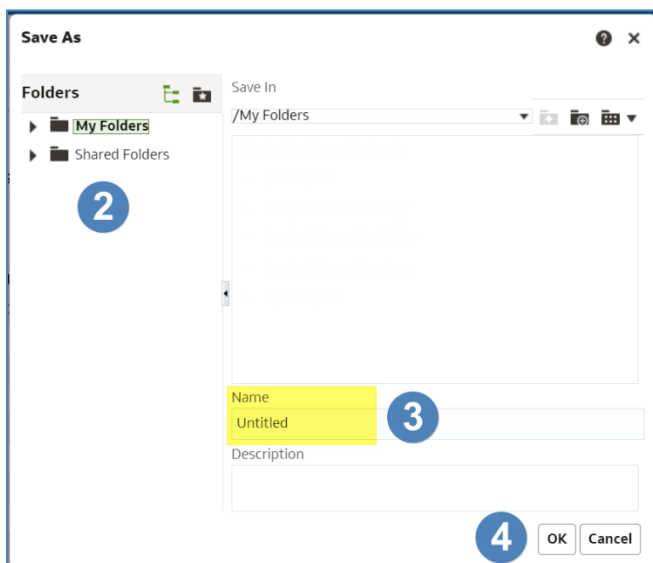


Save – Saves the analysis.



Save As – Will save the analysis as a separate new analysis.

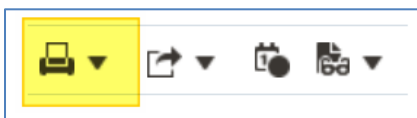
2. Once you have selected save, the system will give you the option to choose the folder you want to save your analysis to.
3. Name the analysis, the default name will show as 'Untitled'.
4. Click 'OK' to save the analysis.



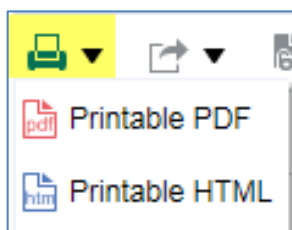
The first time you select 'Save' or 'Save As' on a new analysis, they will do the same thing, save the document.

Print your analysis

- To print, select the 'Print' icon from the toolbar above the compound layout.



- You will then be presented with the print options.

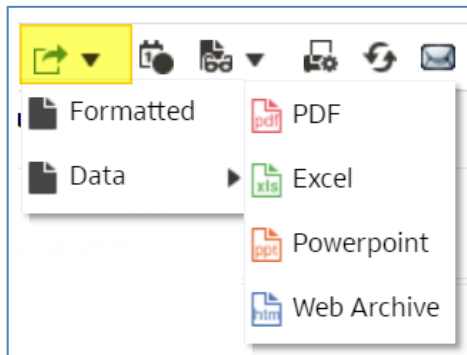


Export your analysis

- To export your analysis, select the 'Export' icon from the toolbar above the compound layout.



2. You will then be presented with the export options. Select the format required from the list presented. CSV can be found under the 'Data' option.

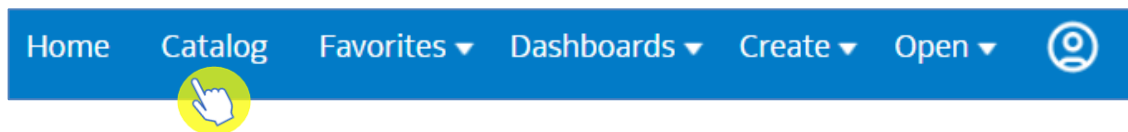


Re-using and editing saved reports and analysis

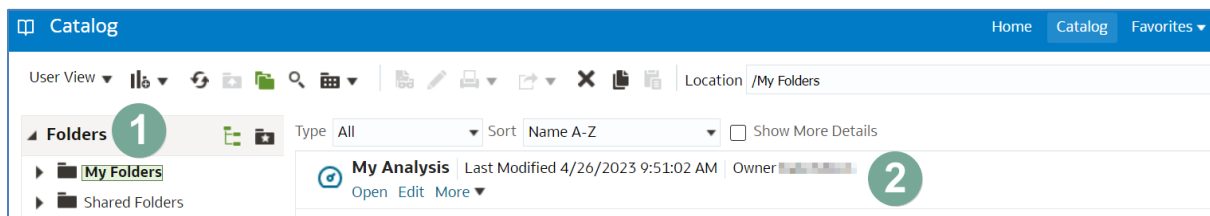
One of the benefits of ePACT2 is that you can save content. Once you have saved your content it is possible to not only open it and view it, but you can also edit your saved content.

Open saved content

1. To open saved content first select the 'Catalog' icon from the Home toolbar.

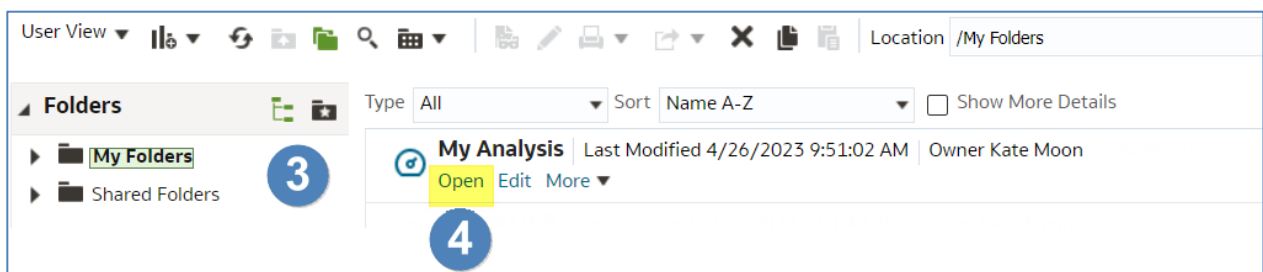


2. You will then navigate to the ePACT2 Catalogue.

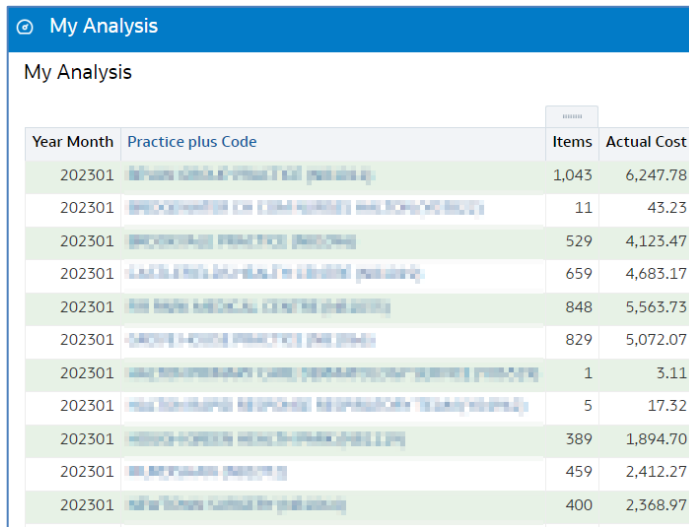


1) Folders	Displays the available folders to open content from
2) Folder contents	When you click on a folder from the menu on the left, the middle pane will show the content of that folder

3. Select the folder you have saved your analysis to.
4. Open your analysis to view the results by selecting 'Open'.



- When you select 'Open' the analysis will run and return your results.

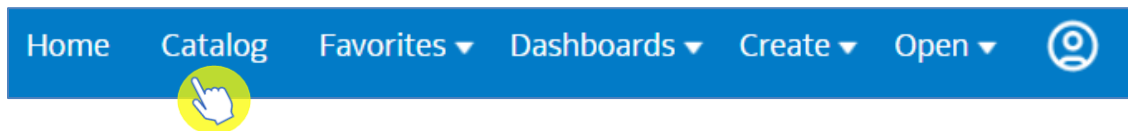


Year Month	Practice plus Code	Items	Actual Cost
202301	WALKER CHILD PRACTICE (PRACTICE)	1,043	6,247.78
202301	WALKER CHILD PRACTICE (PRACTICE)	11	43.23
202301	WALKER CHILD PRACTICE (PRACTICE)	529	4,123.47
202301	WALKER CHILD PRACTICE (PRACTICE)	659	4,683.17
202301	WALKER CHILD PRACTICE (PRACTICE)	848	5,563.73
202301	WALKER CHILD PRACTICE (PRACTICE)	829	5,072.07
202301	WALKER CHILD PRACTICE (PRACTICE)	1	3.11
202301	WALKER CHILD PRACTICE (PRACTICE)	5	17.32
202301	WALKER CHILD PRACTICE (PRACTICE)	389	1,894.70
202301	WALKER CHILD PRACTICE (PRACTICE)	459	2,412.27
202301	WALKER CHILD PRACTICE (PRACTICE)	400	2,368.97

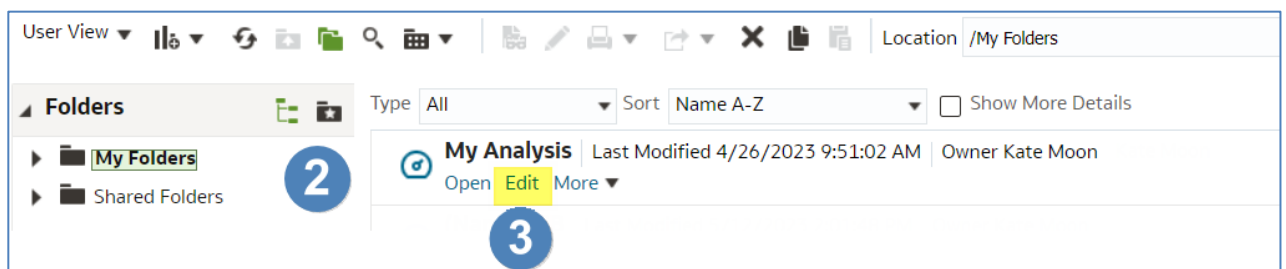
Edit saved content

Another feature of ePACT2 is the ability to edit your saved content, for example, if you have an analysis that you ran last month which you saved, you can edit this analysis and change the time period to get your data for this month.

- To edit your saved content, navigate to the 'Catalog' icon from the Home toolbar.

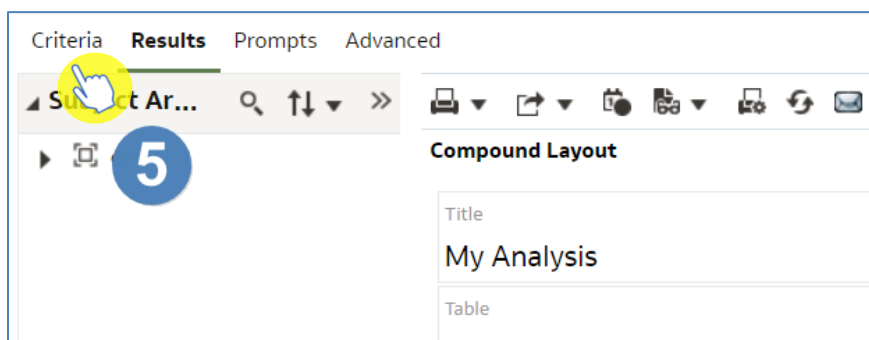


- Select the folder you have saved your analysis to.
- Find the analysis you wish to edit and select 'Edit'.



- Your analysis will open on the results page.

5. You do not need to wait for the results to load if you are going to edit the analysis. As soon as the reports opens, select 'Criteria'.



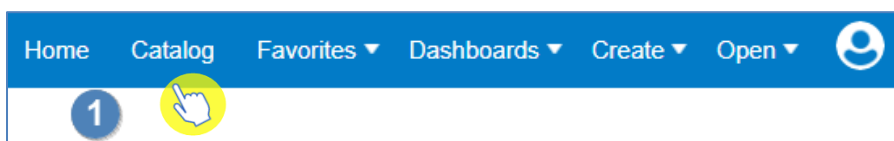
Sharing ePACT2 content with other users

Archiving and Un-archiving

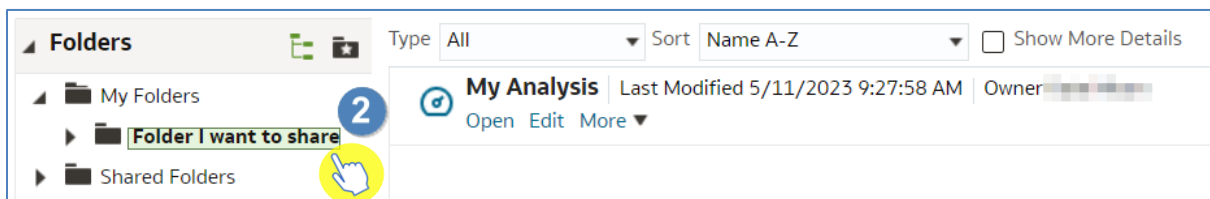
You are able to archive a folder from your ePACT2 'Catalog'. This will save the folder you archive as a document to your PC, you can then share your archived folder with other users, and this will enable you to share Analysis, reports and saved filters.

Archive

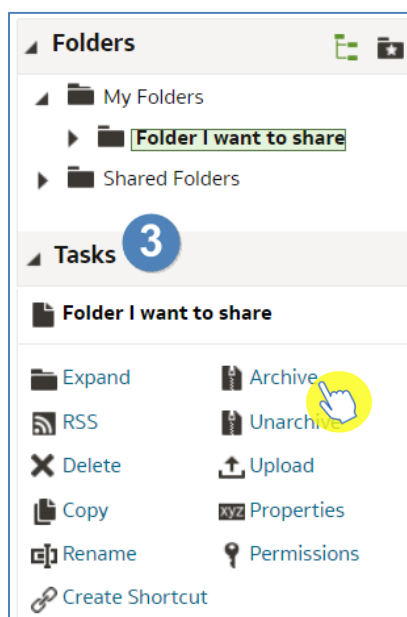
1. To archive, first navigate to your 'Catalog' icon from the toolbar.



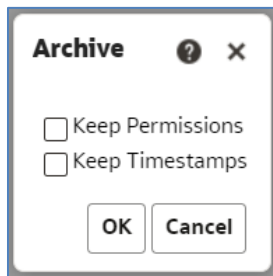
2. Find the folder you want to share and click on the folder name to highlight it.



3. From the 'Tasks' box select 'Archive'.

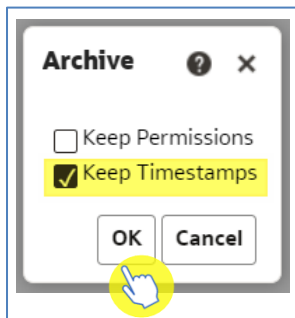


4. You will then be presented with the 'Archive' options box.

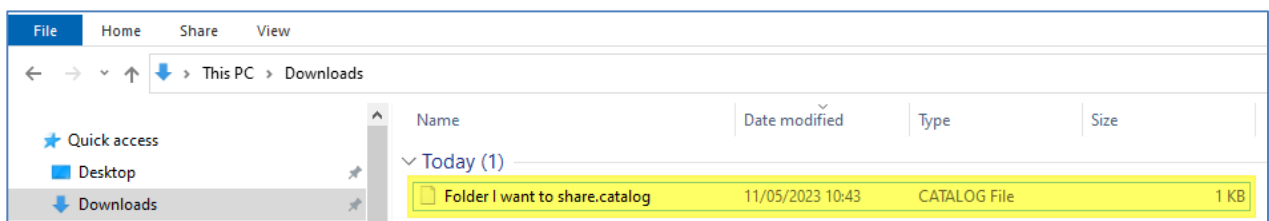


Keep Permissions	Save the permission settings, if any. You can leave this box unchecked
Keep Timestamps	To save information such as time created, last modified, and last accessed. When you un-archive, timestamp information is retained and you can choose to only overwrite items that are older than those in the catalog archive. If you don't select Keep Timestamps, the original age of content isn't saved or considered when you un-archive the content.

5. In this example we will check 'Keep Timestamps', then select 'OK'.

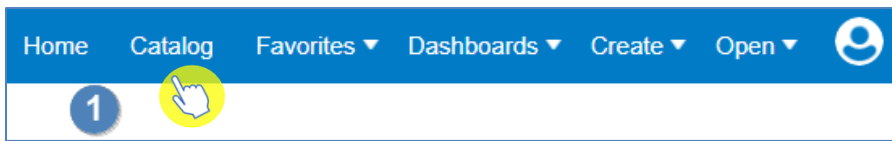


6. Your folder will then save to your PC (it will save to your default internet downloads folder).

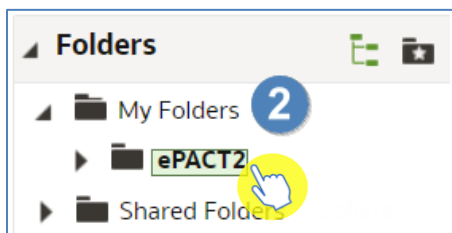


Un-archive

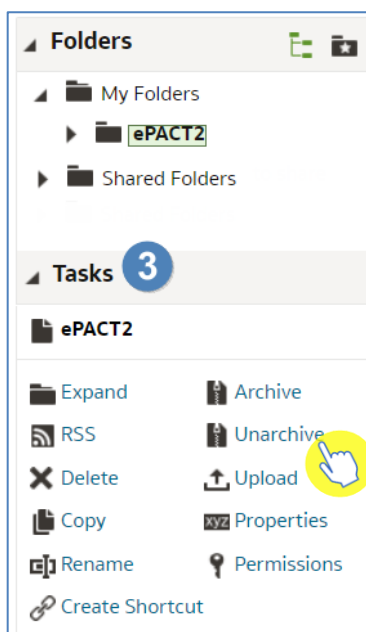
1. To Un-archive a folder first navigate to your 'Catalog' icon from the toolbar.



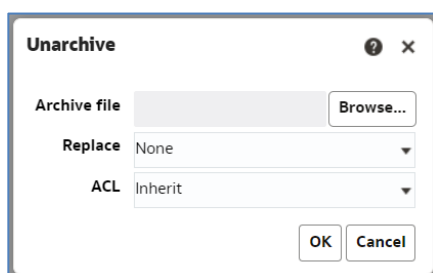
2. You then need to select the folder from your 'Catalog' that you want your un-archived folder to be located. In this example I am selecting the 'ePACT2' folder.



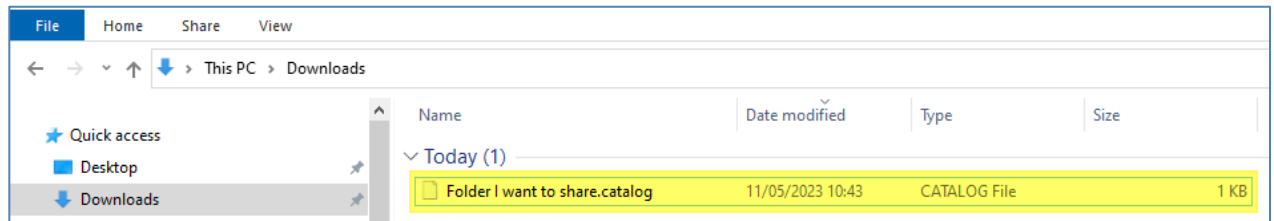
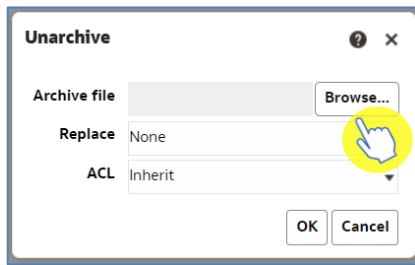
3. Now select 'Un-archive' from the 'Tasks' box.



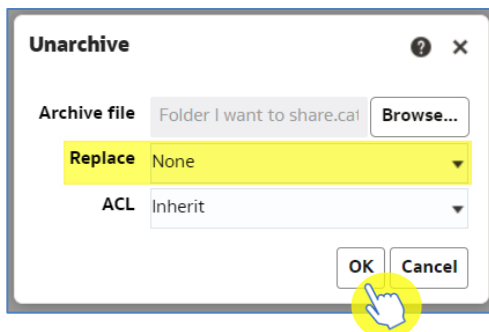
4. You are then presented with the 'Un-archive' options.



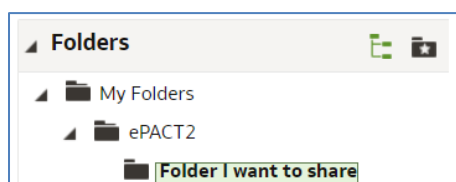
5. Use the 'Browse...' button to locate the folder from your PC that you want to Un-archive.



6. Once you select the folder you also have the option under 'Replace' to leave it as 'None' which won't replace any of your saved analysis. Or select 'Old' which will replace the older version of the content with the same name. Once you have updated your preferences select 'OK'.

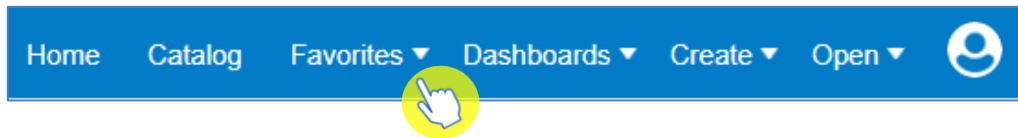


7. The 'Un-archived' folder will now be available in the location you specified.



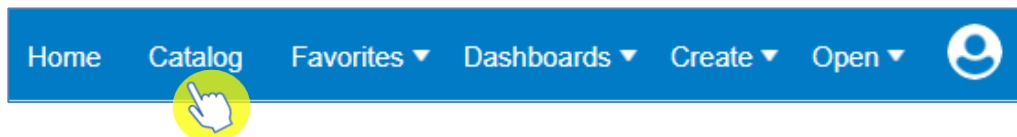
Setting up your favourites

It is possible to set content of ePACT2 as favourites, this means they will appear under the favourites tab on your account. Favourites can be found via the 'Favorites' icon.

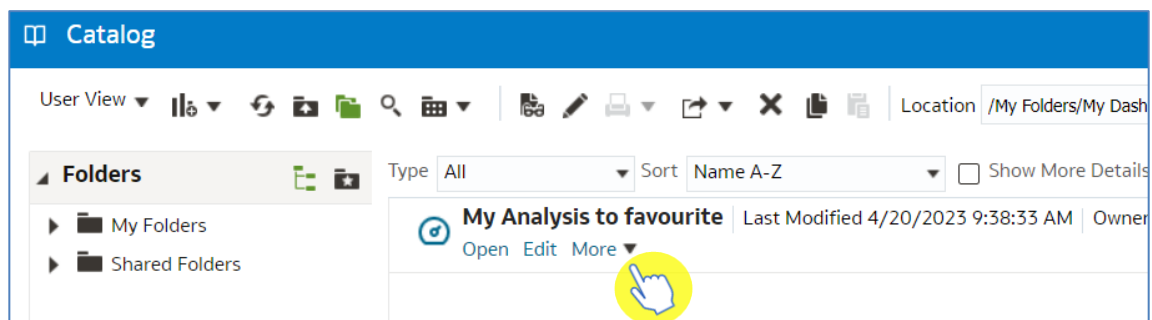


Analysis – Favourite

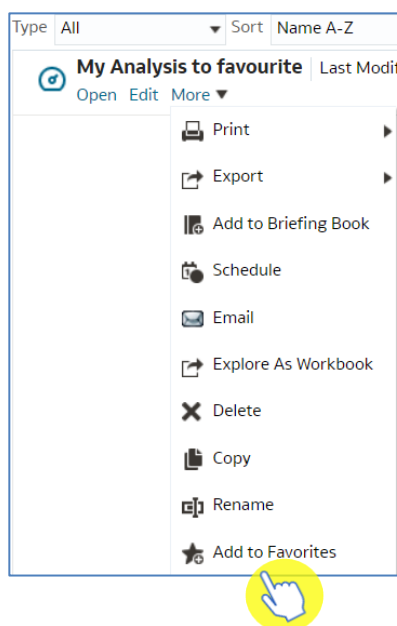
1. To set an analysis as a favourite first navigate to the 'Catalog' via the icon in the toolbar.



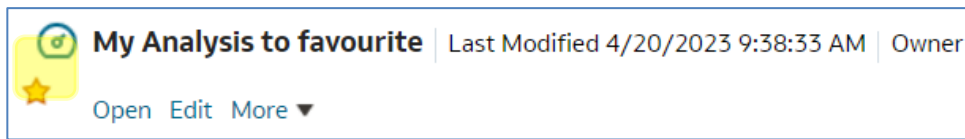
2. Select the 'More' option beneath the analysis title.



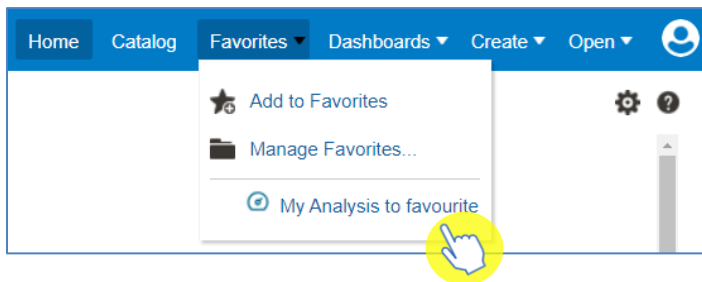
3. From the dropdown select 'Add to Favorites'.



- Your analysis will now show a star in the analysis symbol, this means the analysis is a favourite.



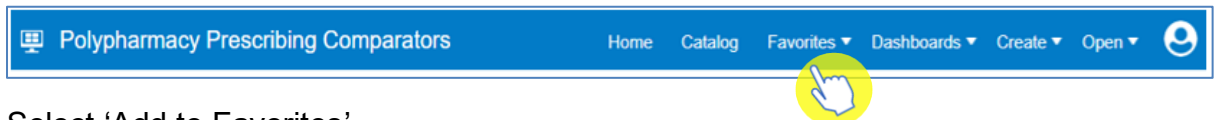
- To access the favourite analysis in the future, select the 'Favorites' icon and select the analysis from the dropdown.



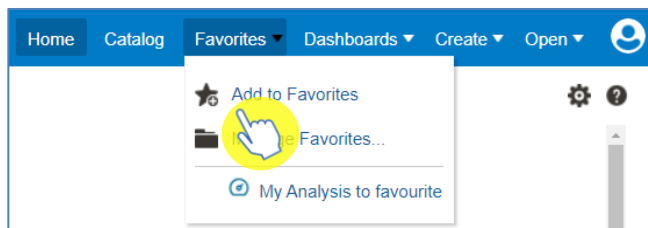
Dashboard – Favourite

To favourite a page from a dashboard, first open the dashboard you would like to add to your favourites, then navigate to the page you would like to favourite.

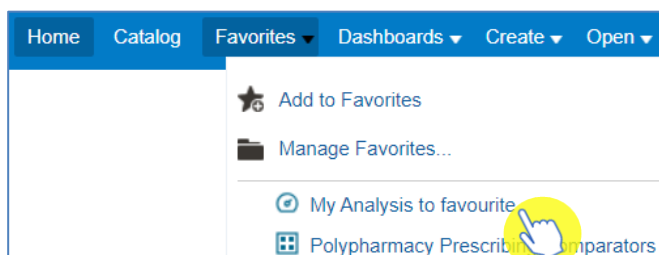
- Select the drop down available for the 'Favorites' tab.



- Select 'Add to Favorites'.

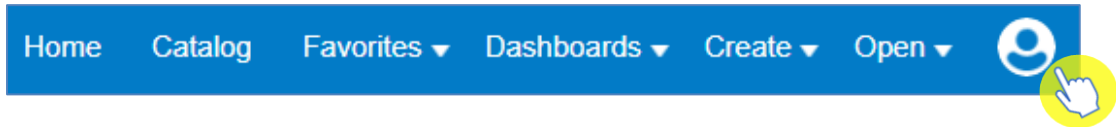


- The page will now appear under the 'Favorites' tab

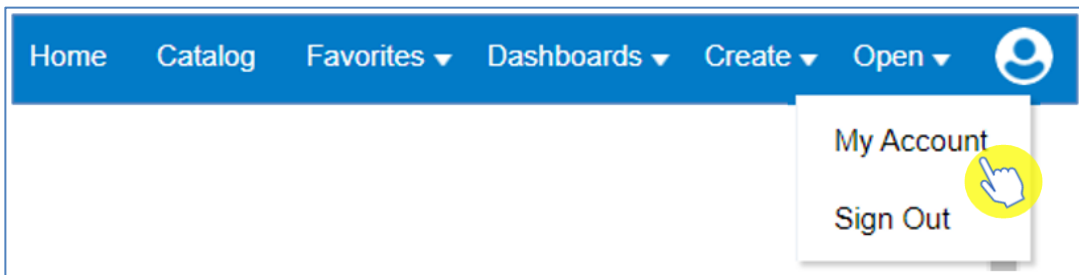


Account Settings

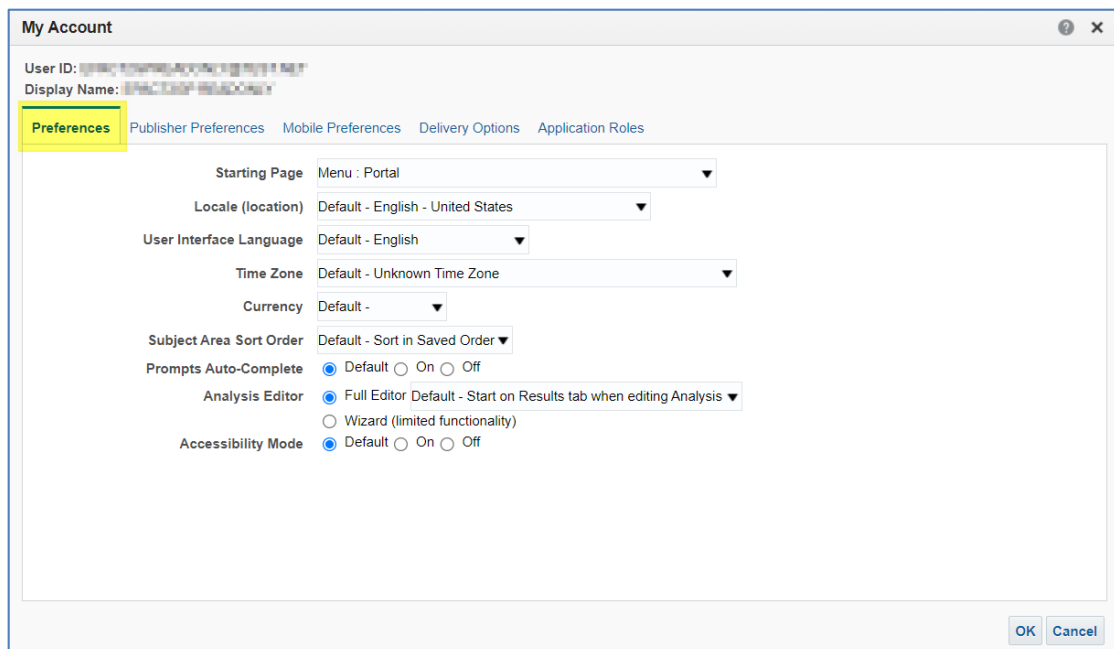
1. The account settings can be accessed by selecting the 'My Profile' icon.



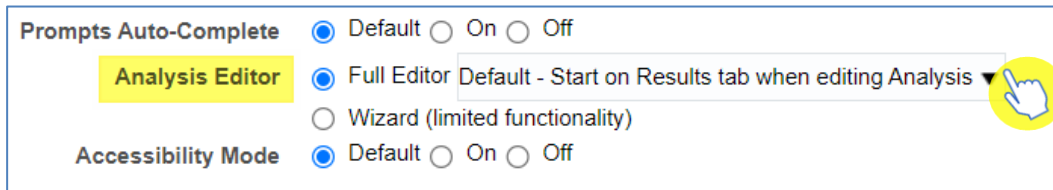
2. You then need to select 'My Account'.




3. Within the preferences tab it is possible to change the default, so that when editing an analysis, it opens on the criteria pane as an alternative to it opening on the results.



4. Select the drop down for 'Analysis Editor'.



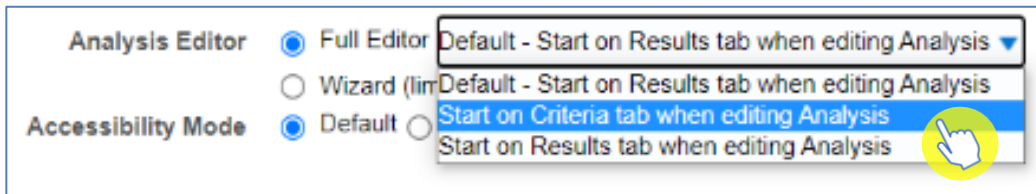
Prompts Auto-Complete Default On Off

Analysis Editor Full Editor Default - Start on Results tab when editing Analysis ▼ 

Wizard (limited functionality)

Accessibility Mode Default On Off


5. Select 'Start on Criteria tab when editing Analysis'.



Analysis Editor Full Editor Default - Start on Results tab when editing Analysis ▼

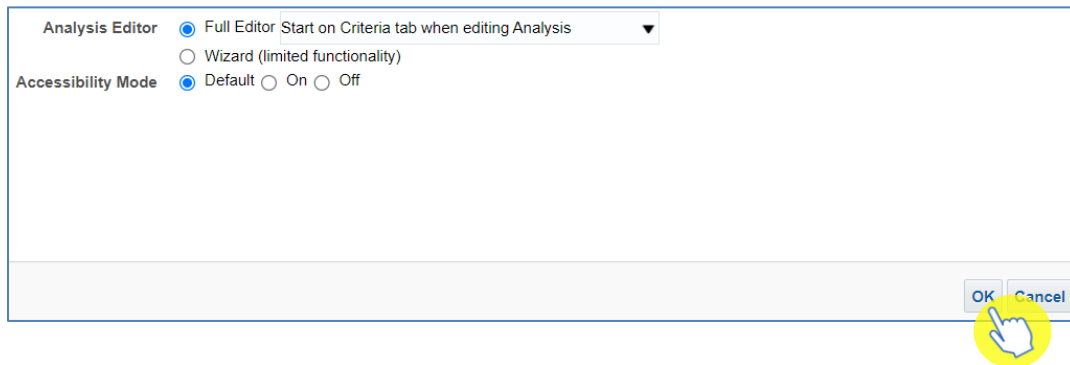
Wizard (limited functionality) Default - Start on Results tab when editing Analysis

Accessibility Mode Default On Off

Start on Criteria tab when editing Analysis 

Start on Results tab when editing Analysis


6. Select 'OK' to action the change.



Analysis Editor Full Editor Start on Criteria tab when editing Analysis ▼

Wizard (limited functionality)

Accessibility Mode Default On Off

OK Cancel 

Getting more help



Additional training material and user guides

The ePACT2 training team has developed several how to guides to help you get the best out of ePACT2. These can be found on our [ePACT2 user guides page](#)

Webinar sessions

We offer a free webinar training service to all our users and you can book as many sessions as you need.

Our webinar sessions are booked as 1hour slots and we offer a number of different sessions covering a range of topics.

We also offer bespoke sessions which are delivered just to you or your invited colleagues. You can let us know if you have any specific topics or reports you'd like to cover or if you would prefer an introductory tour of the system.

Our experienced trainers deliver these sessions using MS Teams and you can take part wherever you are as long as you can get online.

You can find our more and book your webinar by going to our [ePACT2 training page](#)