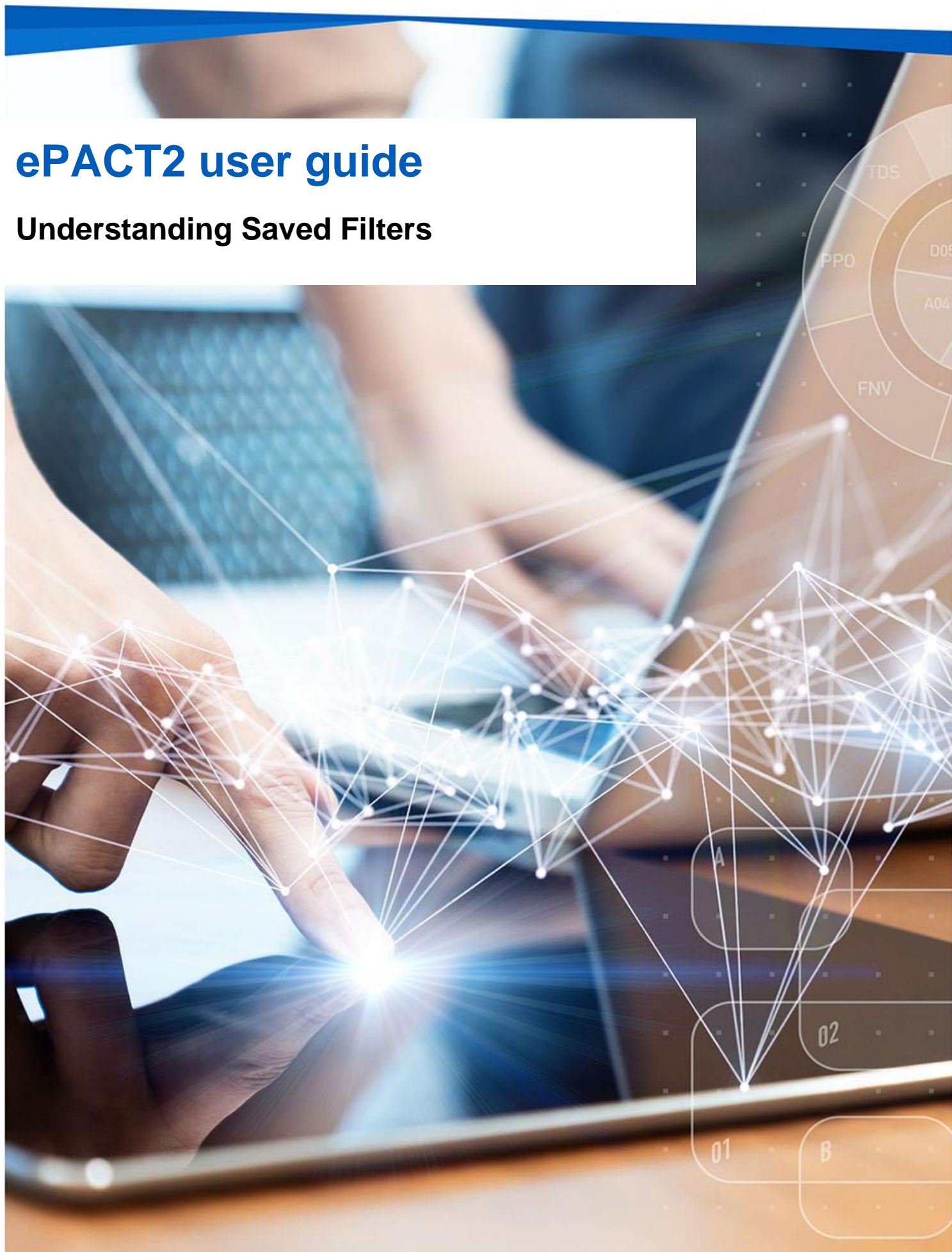# ePACT2 user guide

Understanding Saved Filters

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:

Contents

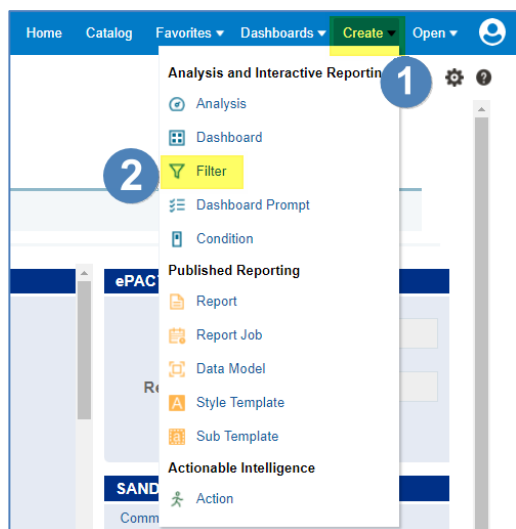# Creating and Saving Filters
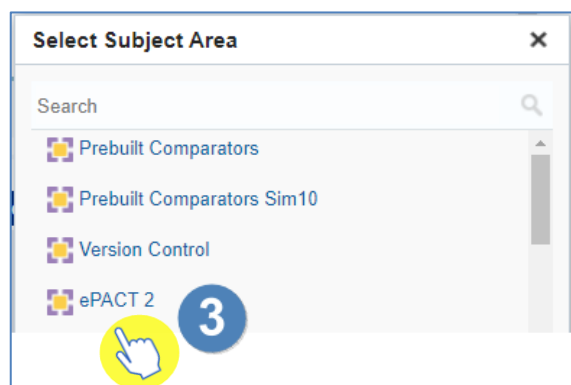
Saved filters are separate objects saved in the 'Catalogue' which can be reused against multiple analyses.
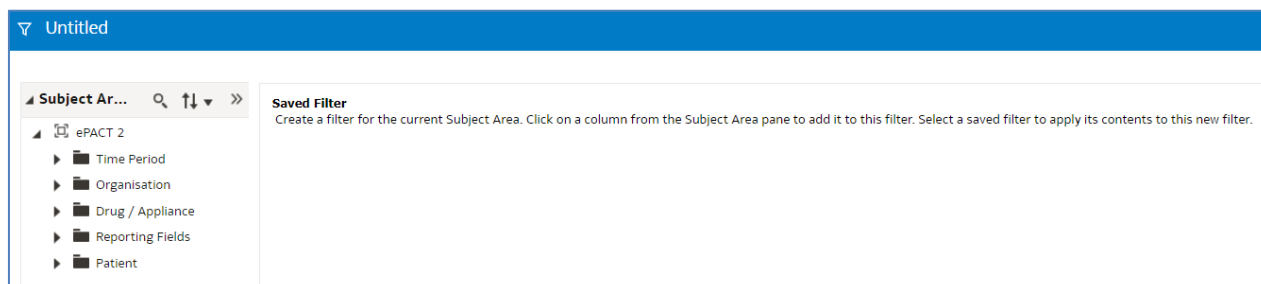
Creating a Saved Filter

1. From the 'Landing Page' select 'Create'.

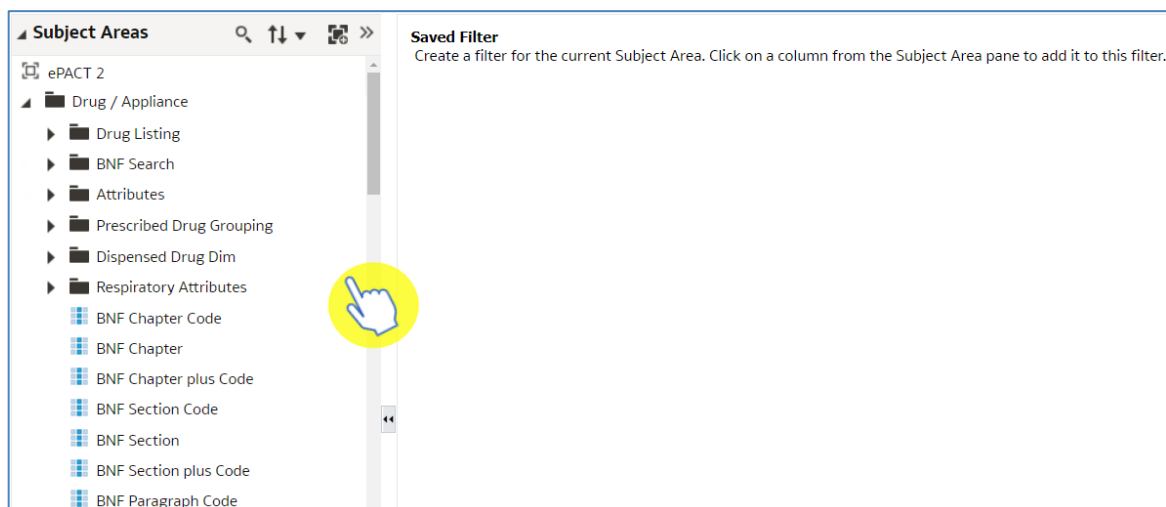2. Select 'Filter' from the drop-down list presented.

3. Select the 'ePACT2' subject area.

4. The 'Saved Filter' pane will open.

5. Expand the subject area to locate the column you wish to create the filter on and double click to select.

6. The 'New Filter' pane will be displayed.

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.

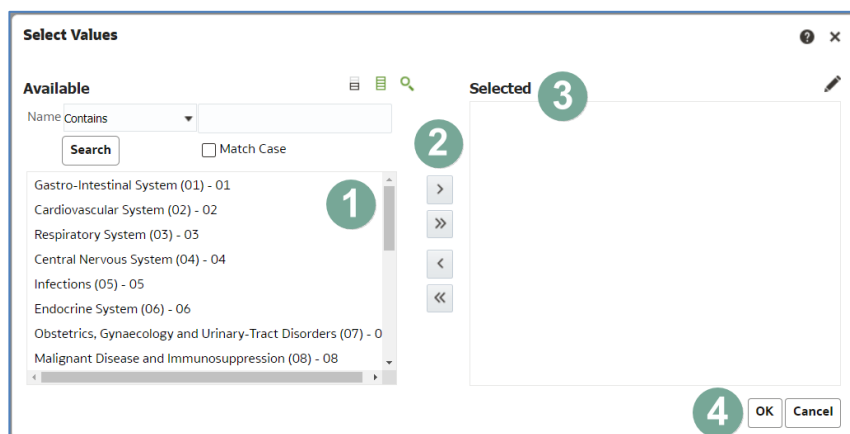1. The first is to select the drop-down arrow option and pick a value from the available list.

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

2. The second 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; this will move the highlighted value into the 'Selected' section.
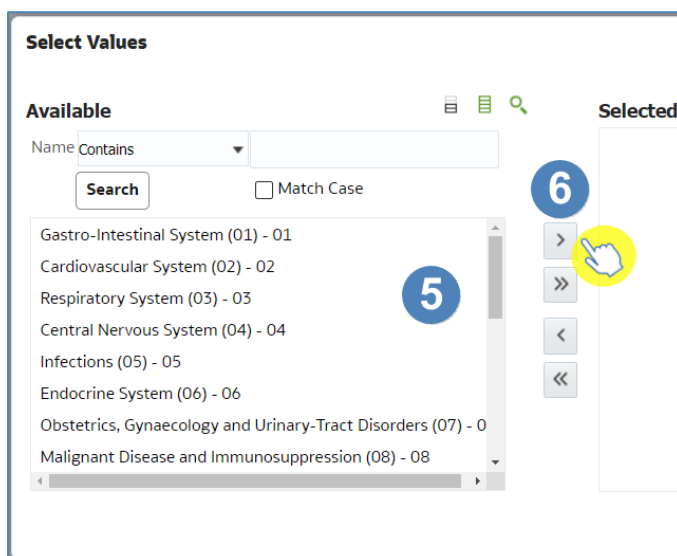
7. Select 'OK' to apply the filter.
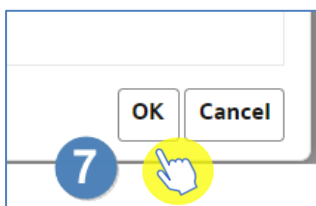
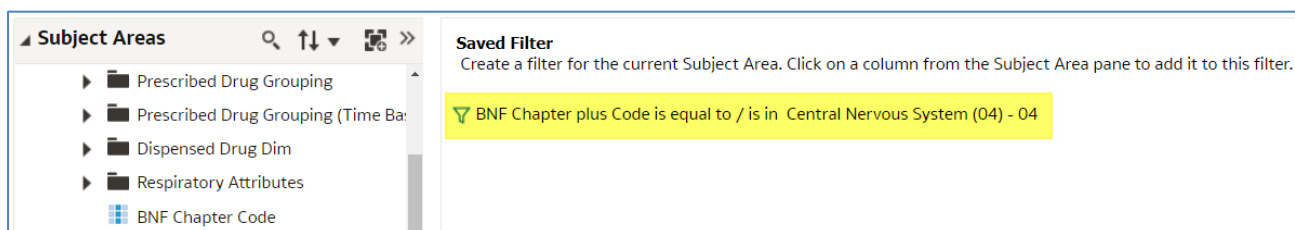! Selecting this icon [>] will move only the highlighted value.

Selecting this icon [>>] will move all available values.

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8. Select 'OK' in the 'New Filter' pane. This pane will show the filter you are about to apply, in this example it is for the BNF Chemical Substance being in or equal to Central Nervous System (04).

9. When you select OK the filter is then applied to the 'Saved Filter' pane.

Saving a Filter

1. To save your filter you can select the 'Save or 'Save As' icon available in the top right-hand corner of your saved filter pane.
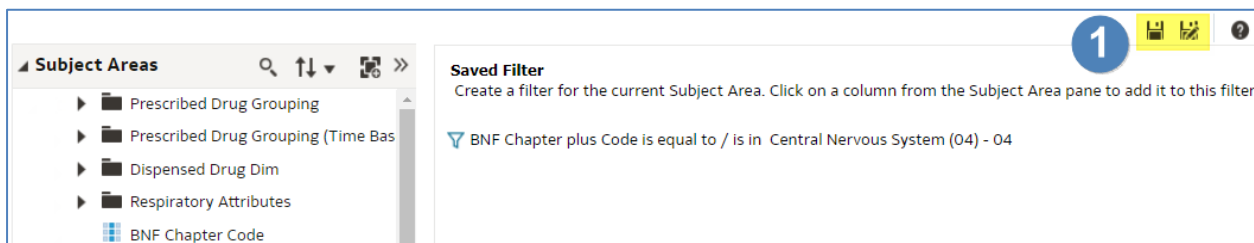
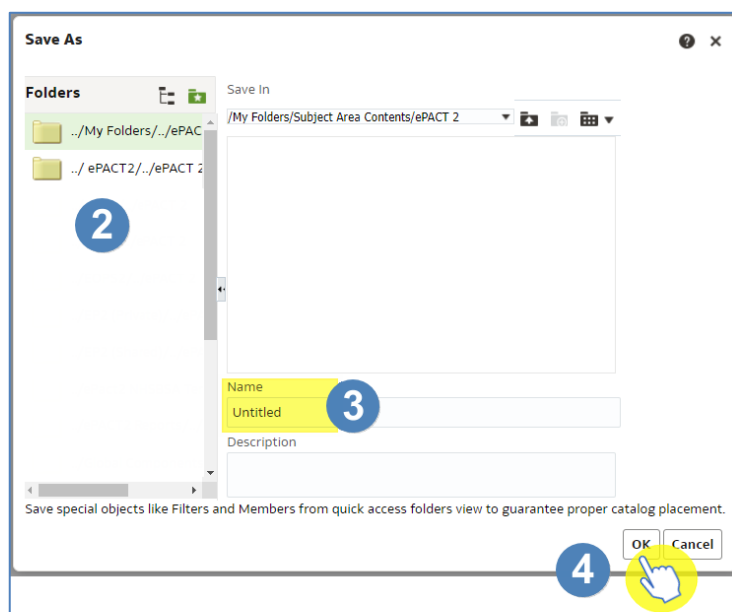Save – Saves the filter, overwriting any current version.

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

2. When you select save, the system will then give you the option to choose the folder you want your filter saved in.

3. Name the filter, the default name will show as 'Untitled'.

4. Click 'OK' to save the filter.

5. A 'Saved' icon will momentarily appear next the 'Save' and 'Save As' icons.
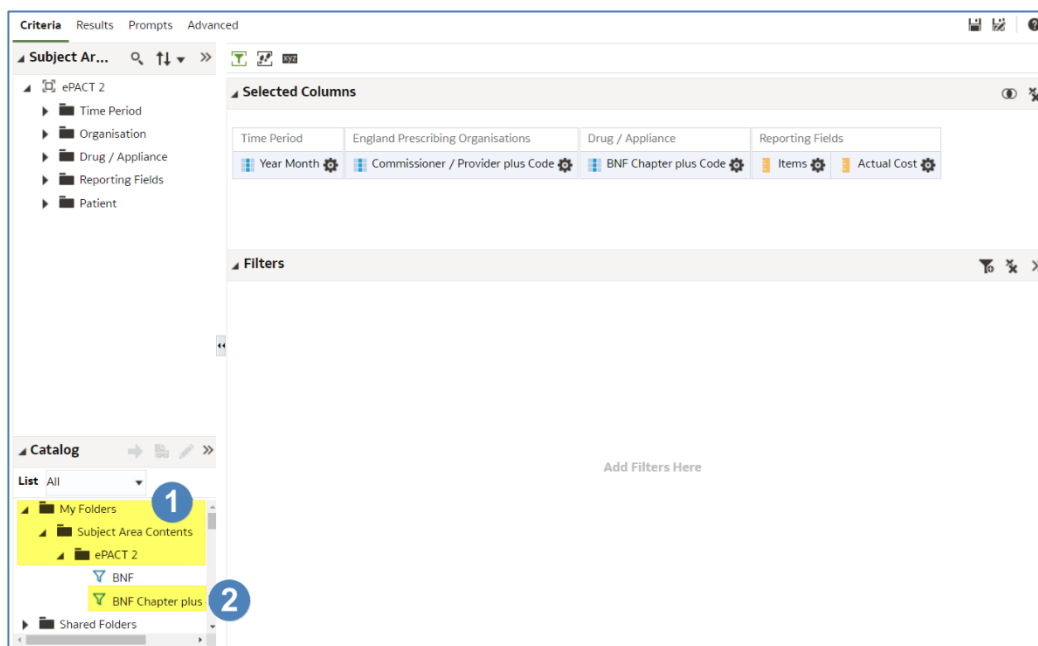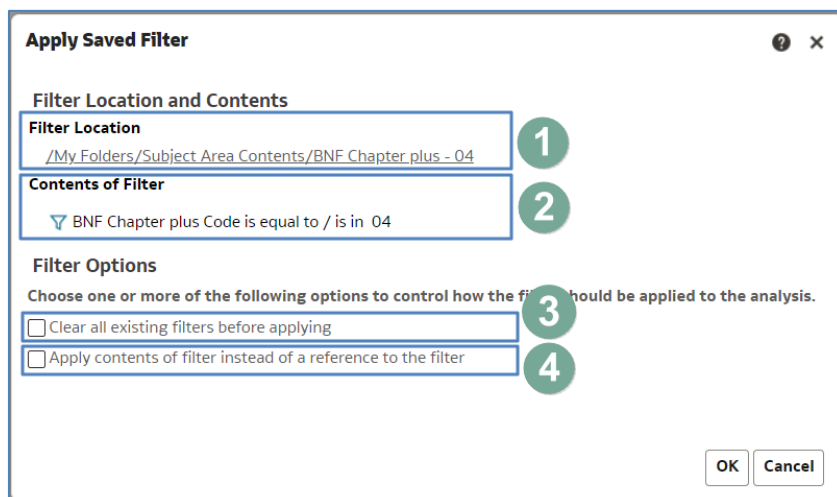
Applying a Saved Filter to an Analysis

Once saved, filters can then be added to an analysis when it's created.

1. Within the analysis, expand the folder containing the saved filter.

2. Double click on the saved filter.

3. The 'Apply Saved Filter' pane will be displayed.

1)	Displays the location the filter is saved to. When leaving the 'Apply contents of filter instead of a reference to the filter' un-ticked the analysis will reference back to this location.
2)	Displays the contents of the filter, when you create a filter using name, the system automatically converts to the code.

| 3)	If you tick this box, it will remove any filters you have previously applied to your analysis.
4)	If you tick this box, it will take the contents of the filter and apply this to your analysis. This will mean if you alter or delete the filter in the future this analysis will not be affected. If you leave the box un-ticked, your analysis will reference back to where the filter is saved. This means that if you update the filter in the future this analysis will automatically update with the changes

4. Select 'Ok' to apply the filter.
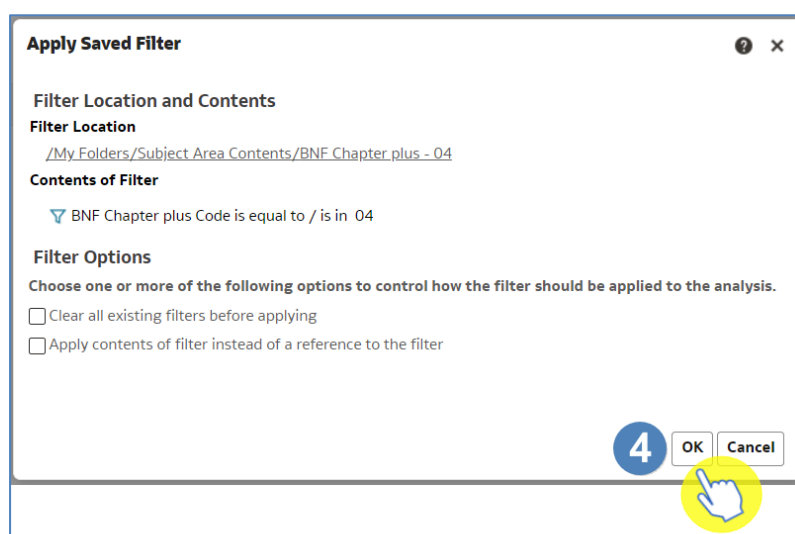
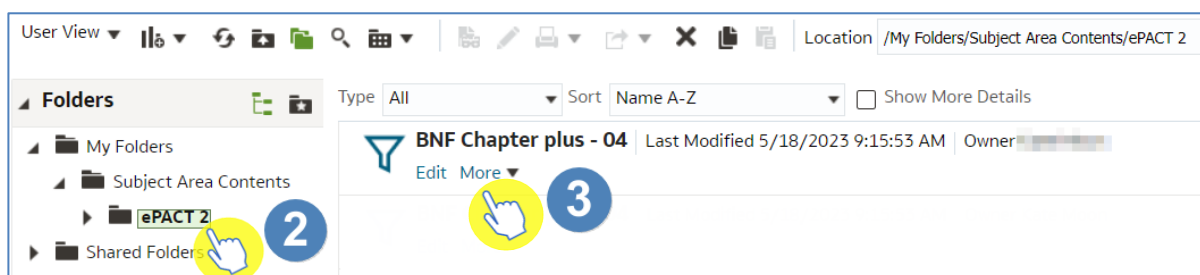
5. The 'Saved Filter' will be added to the filter pane.
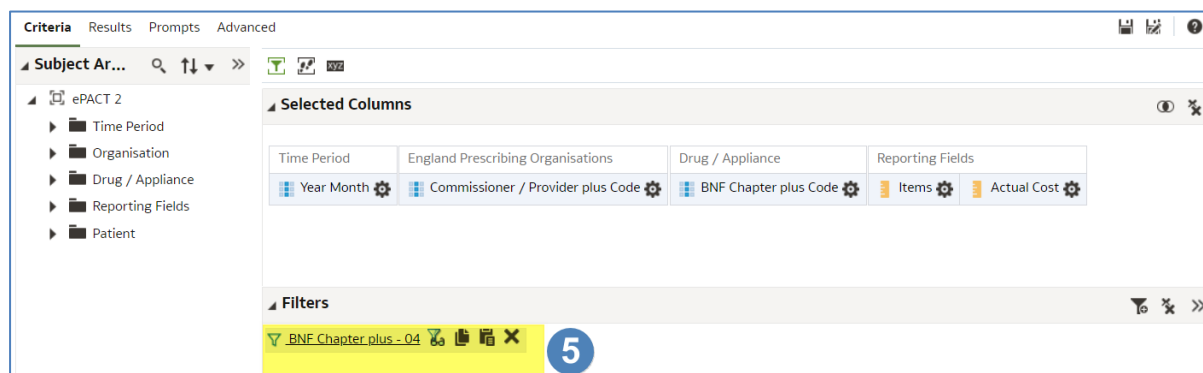
Editing a Saved Filter

Once created a 'Saved Filter' can be edited to include different information.
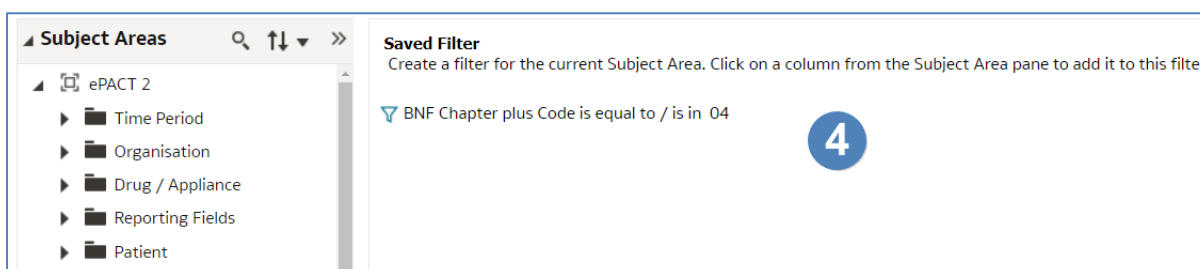
1. To edit a 'Saved Filter', select the 'Catalog' icon.
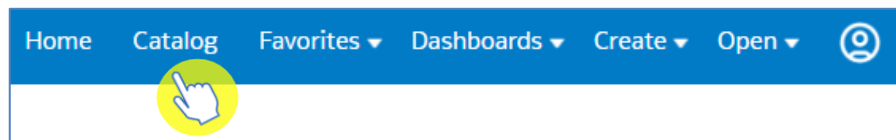
2. Expand the 'My Folders' and select the folder containing the filter.

3. The 'Saved Filter' will be displayed, select 'Edit'.

4. The 'Saved Filter' pane will be displayed, any changes required can now be made.

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.

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