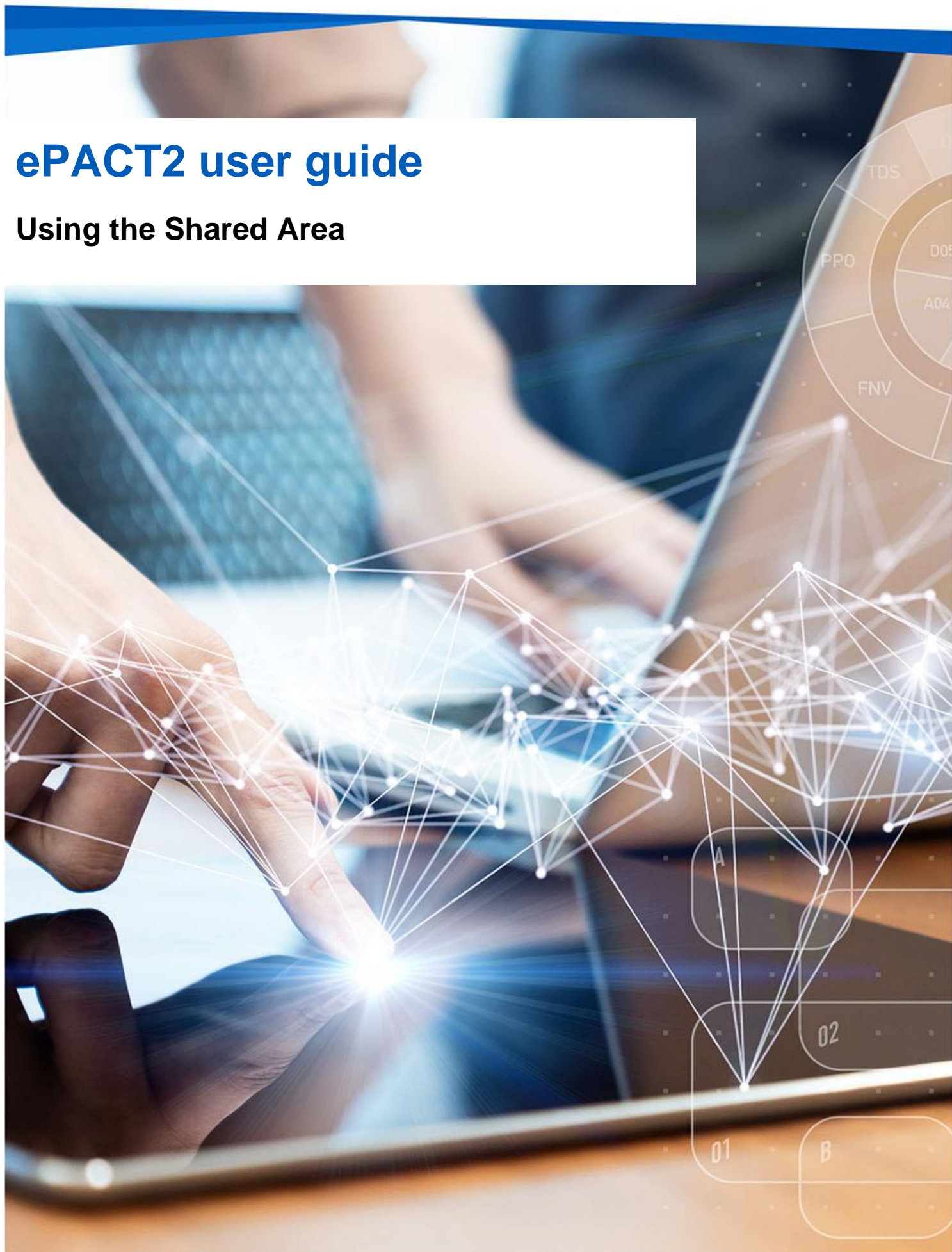# ePACT2 user guide

Using the Shared Area

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

Shared Area Guidelines

A folder has been created called 'Shared Area'.

In this folder you can share any ePACT2 content with any user that has access to the folder. We want to keep this folder open for everyone to share content, the NHSBSA will not amend or delete any content that has been stored in the shared folder.

There are two main things you need to understand when using the shared folder.

- Creating content in the folder

- Setting permissions in the folder

In this guide we will explain these functions in depth.

Community Guidelines

You are responsible for all content that you add to the Shared Area therefore:

- You need to be aware that other users could edit or delete your content if you do not correctly set your permissions

- The NHSBSA and ePACT2 team will not be able to recover any content accidently deleted or amended within the Shared Area

Permissions

a) Ensure appropriate permissions are set to ensure you can access and manage the content

b) Update permissions to hide content from other users when appropriate

Organise your folders for ease of use

We would recommend the following structure:

> Shared Area

> > Your CCG folder

> > > Analysis

> > > Saved Filters

Naming content

1. Reference organisations name(s)

2. Use Title Casing (Capital first letter of every word)

3. Do not use cryptic codes that only you understand (Make it mean something to everyone else)

4. Keep names as short as possible by using common abbreviations (such as CCG for Clinical Commissioning Group)

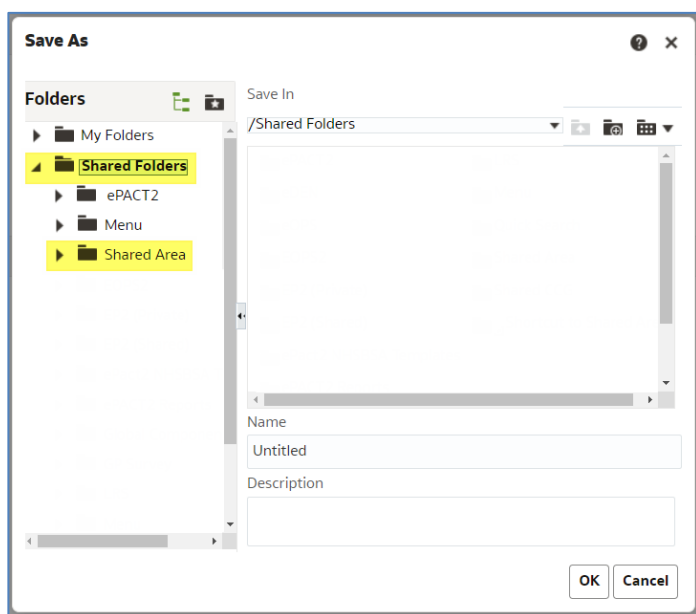5. Use sequential numbering (01, 02, etc instead of 1, 2, etc)

Adding content to the Shared Area

To add content to the shared area, you can select the Shared Area as the saved location.

To save content, select the 'save' or 'save as' icon on the report.
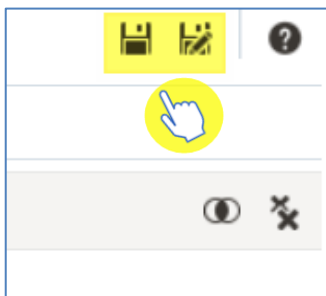
To save to the Shared Area, click on the drop down for 'Shared Folders' then open 'Shared Area'.

You can then save your content in the shared folder by clicking on the folder you want to save the content into. To save the report, enter a 'Name' and then click 'OK'.

If you want to create a new folder in the 'Shared Area', click on 'Shared Area', so it is highlighted and then click on the 'New Folder' Icon.
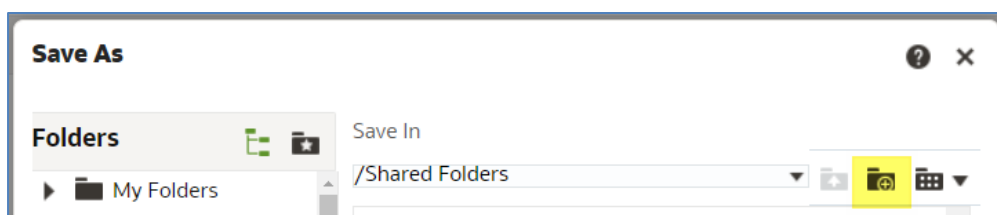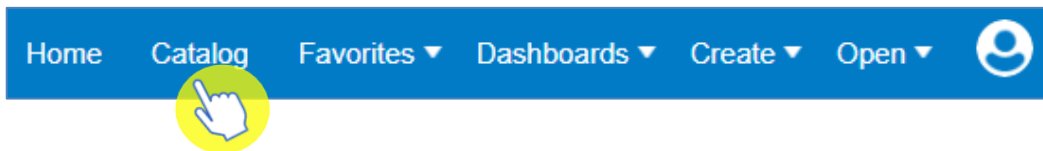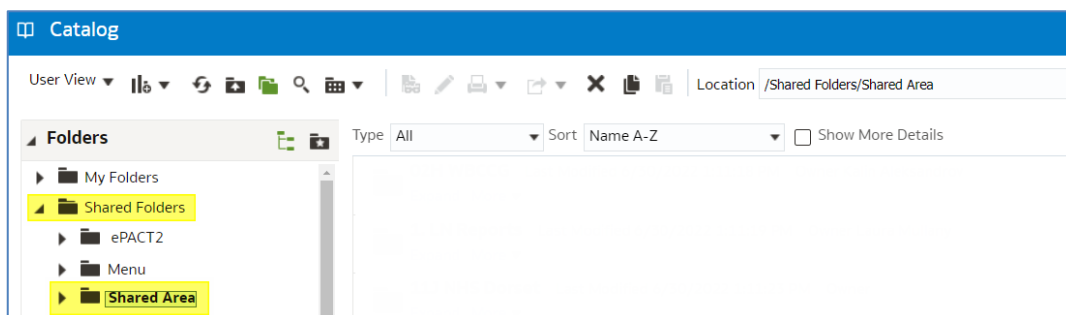
Accessing the Shared Area

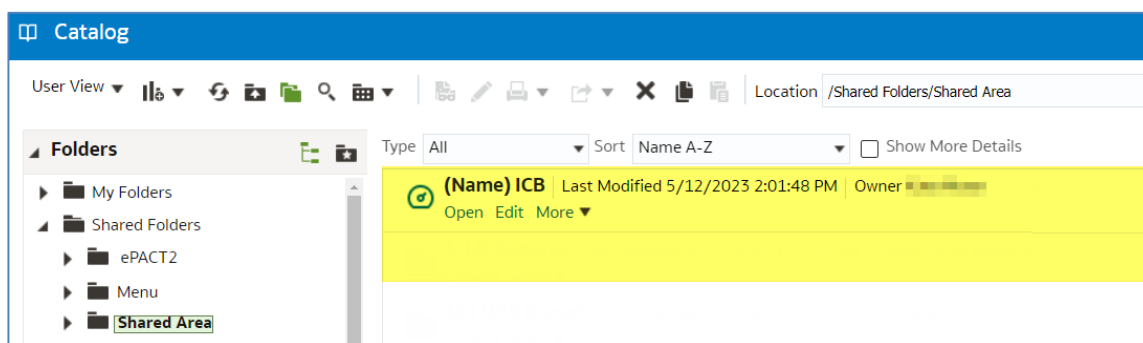## Navigate to the Shared Area

1.   Select 'Catalog' from the ePACT2 toolbar.

2.   Expand the 'Shared Folders' from the folders section, then click on 'Shared Area'.

3.   The Shared Area will open, and you will be able to see all available content.

Updating permissions on shared area content

Any new content created will always default to the parent folder permissions, the default permissions for all users is to be able to read, write, execute, and delete the content. This means by default all users will be able to view and edit content you have created; it also means that other users could potentially delete any content you have added to the shared area.

In this section we will look at setting the permissions on content to limit what other users can do with it.

It's important to remember that if you change the permission on a report this could potentially remove your own access to it.

When changing permissions always remember to assign full control to yourself before removing any current permissions.
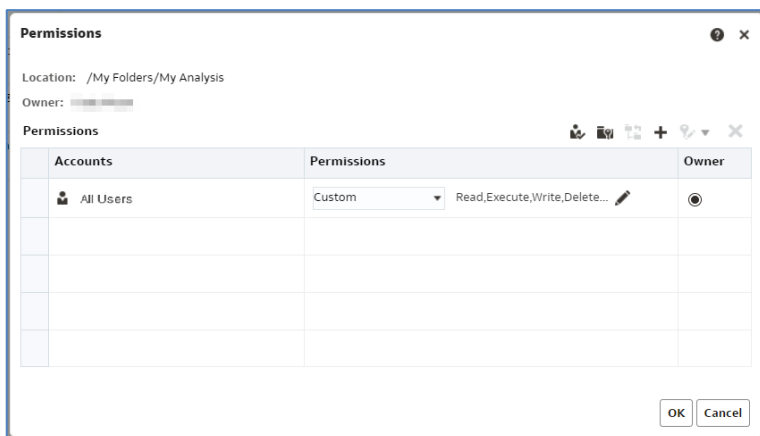
Accessing current permissions

1.   Once the content has been saved in the shared area, click on 'More'.

2.   From the drop-down list, select the 'Permissions' option.
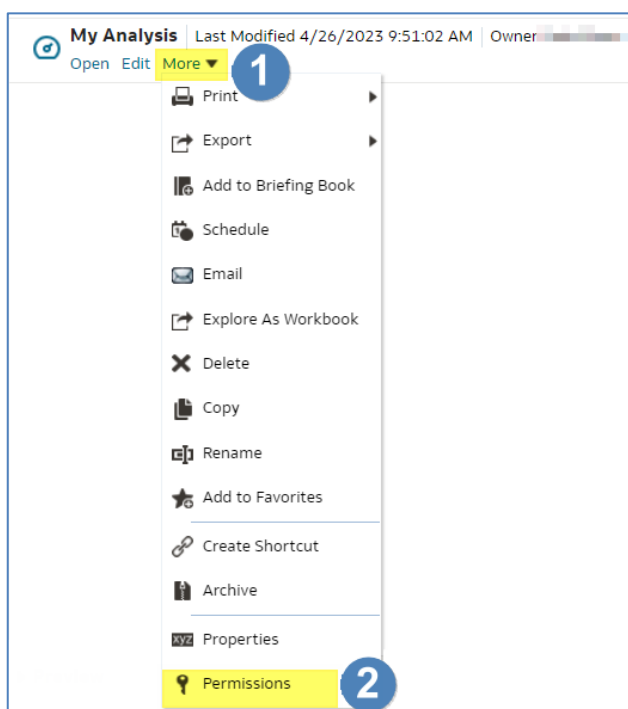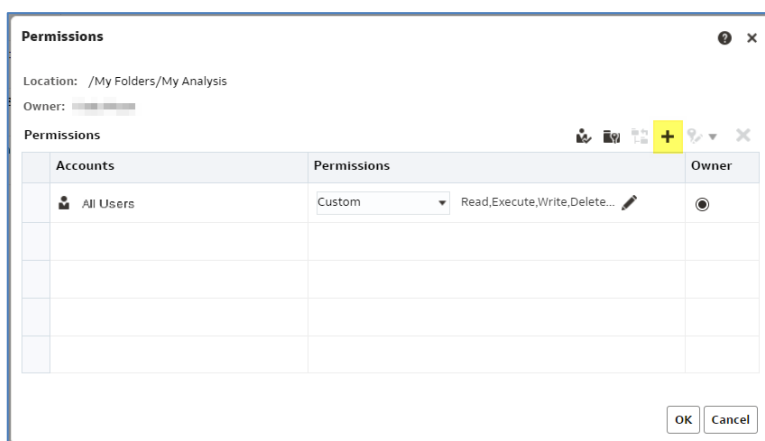

4.   The 'Permissions' pane will be displayed.

5.   By default, all users will be able to view and edit content.
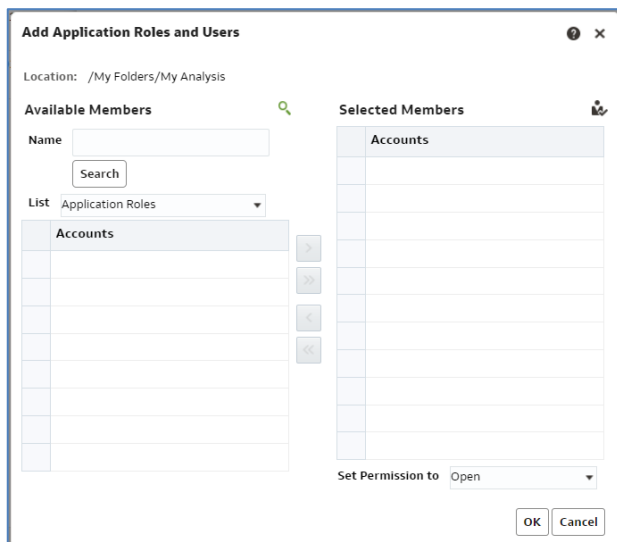

Assigning permissions to specific users

To assign permissions to yourself and if you would like to assign permissions to other individual users, this can also be done within the 'Permissions' pane.

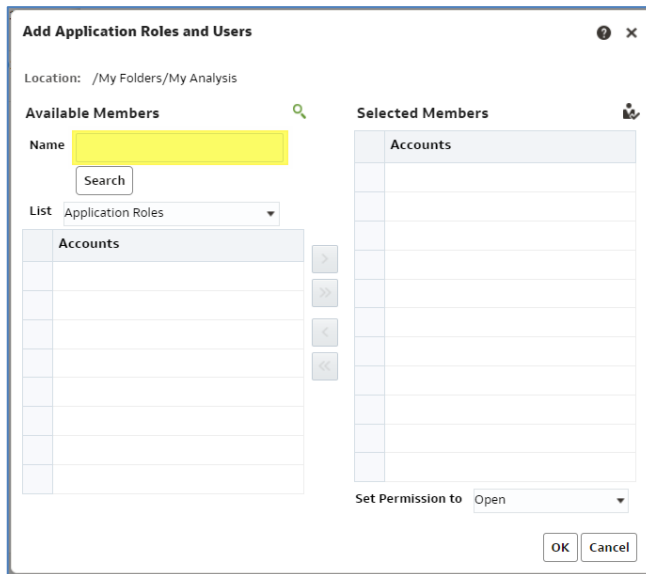1.   Select the 'Add users/roles' icon

2.   The 'Add Application Roles and Users' pane will be displayed.
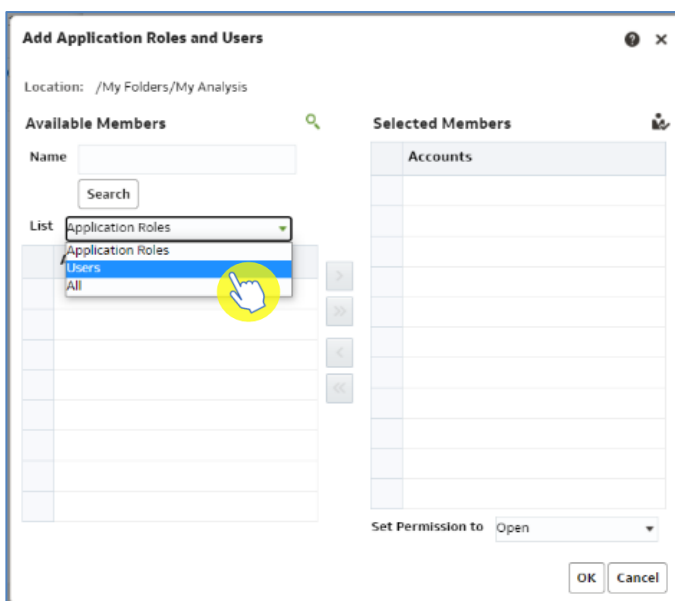
3.   Enter the name of the user you wish to assign permissions to in the 'Available Members' pane.
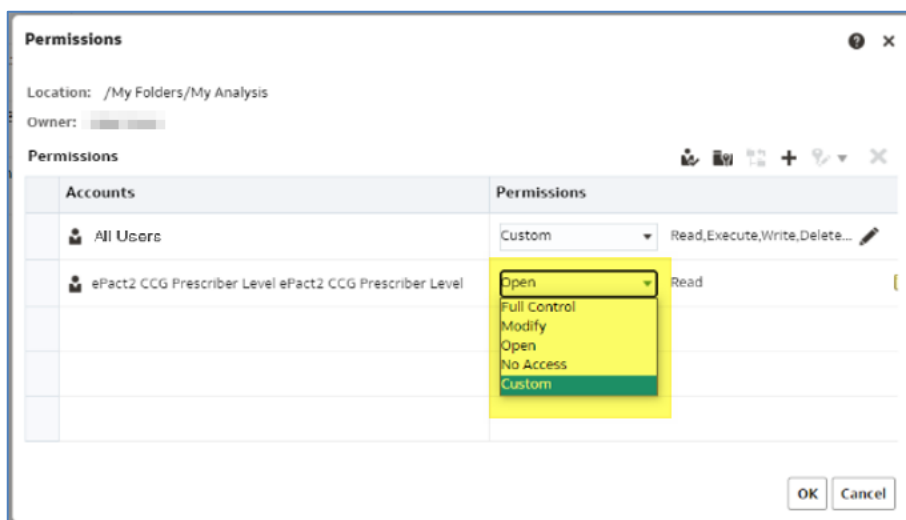

4.   From the 'List' drop-down option select the option for 'Users'.

5.   Select 'Search', the users matching the search term will then be displayed.

6.   Use the arrows to move the required users into the 'Selected Members' area and click 'OK'.

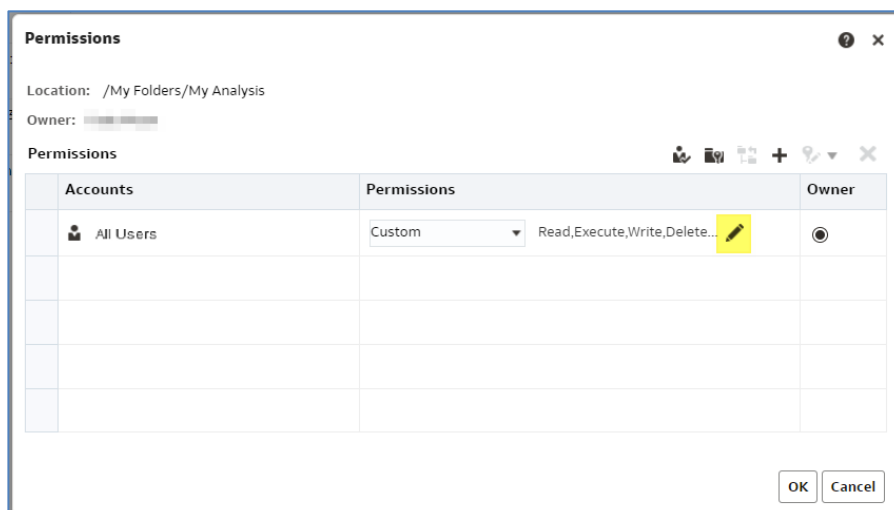7.   The users selected will then be added to the permissions pane.
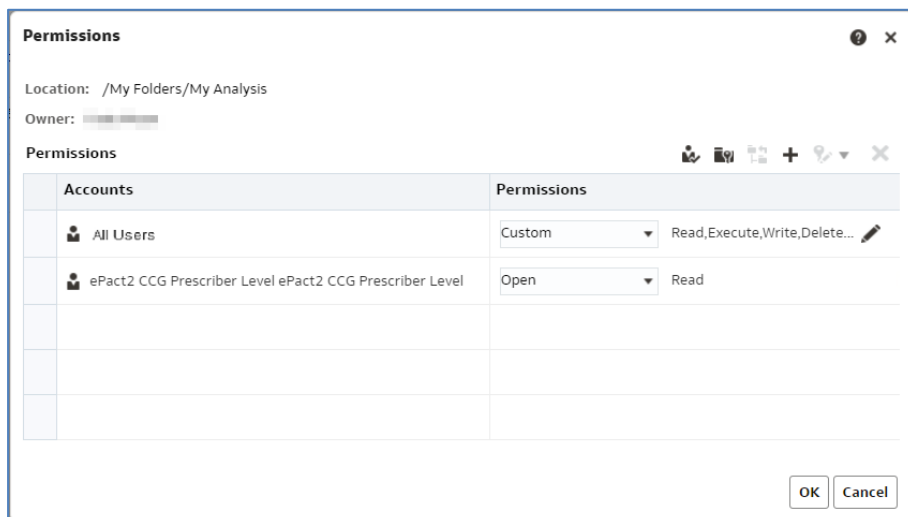
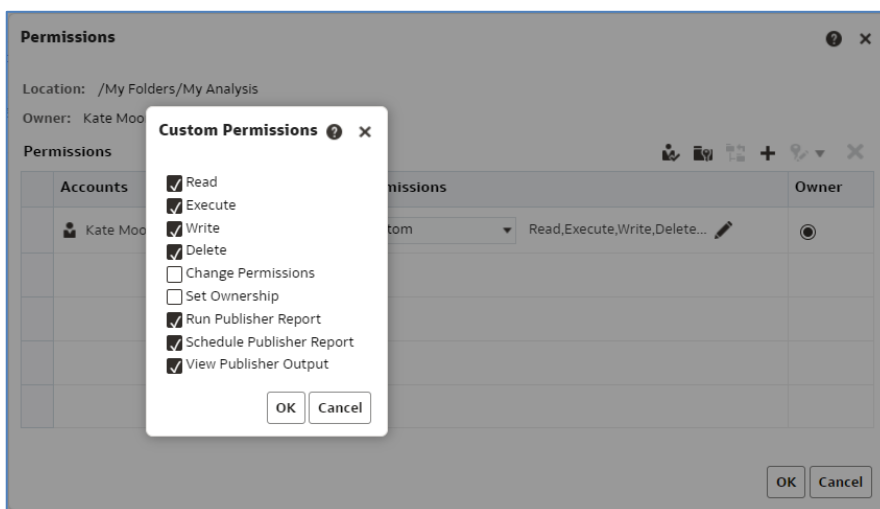8. Permissions for the user can then be set using the 'Permissions' drop-down option.

Changing permission

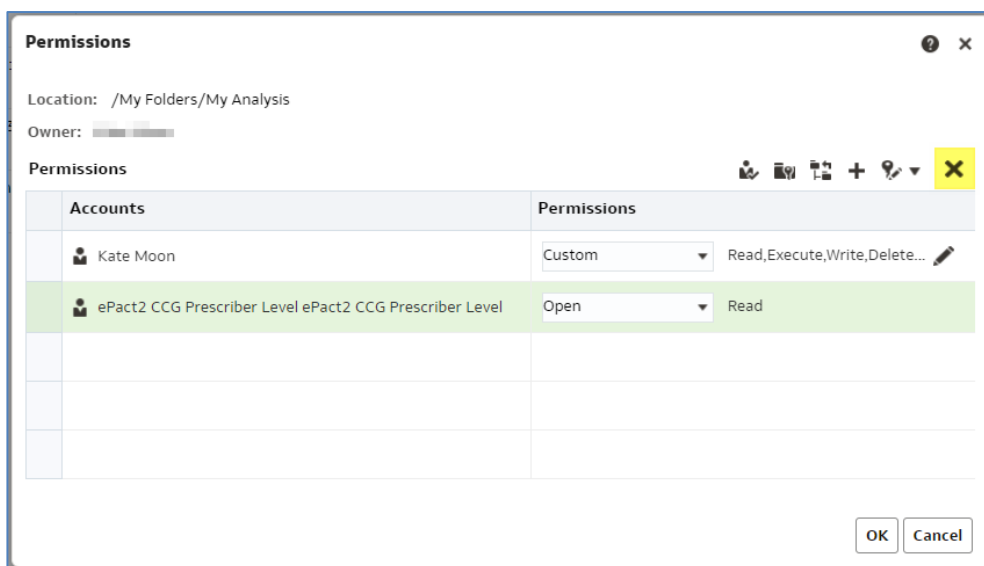1. To change the permissions, select the 'Edit Custom Permissions' icon.

2.   From the drop-down list select the permissions you wish to allow to users

Removing permissions for a user/group of users

1.   Within the permissions tab, left click the required user to highlight.

2.   Select the 'X' icon to delete the user permissions.

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