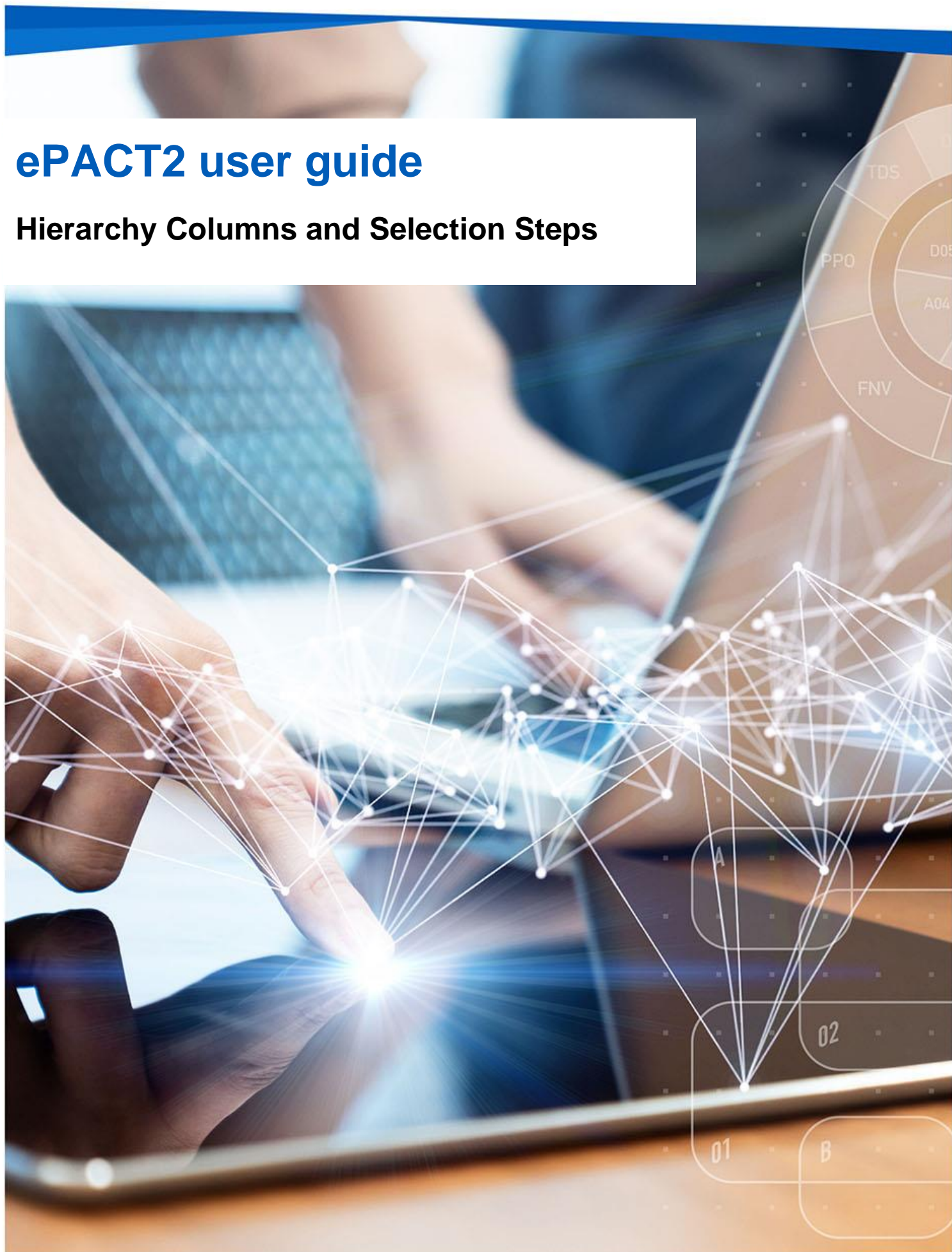# ePACT2 user guide

Hierarchy Columns and Selection Steps

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:
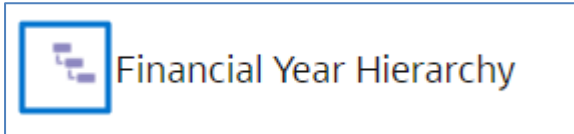
Contents

Hierarchy Columns

There are numerous 'Hierarchy' columns within ePACT2; the columns are indicated with the hierarchy symbol as shown in the example below:

'Hierarchy' columns can be used in conjunction with selection steps within your analysis results to display different levels of data within the same report.

The benefit of using 'Hierarchy' columns is that this allows you to navigate down to lower levels of data within the same analysis. Normal columns do not allow you to do this.
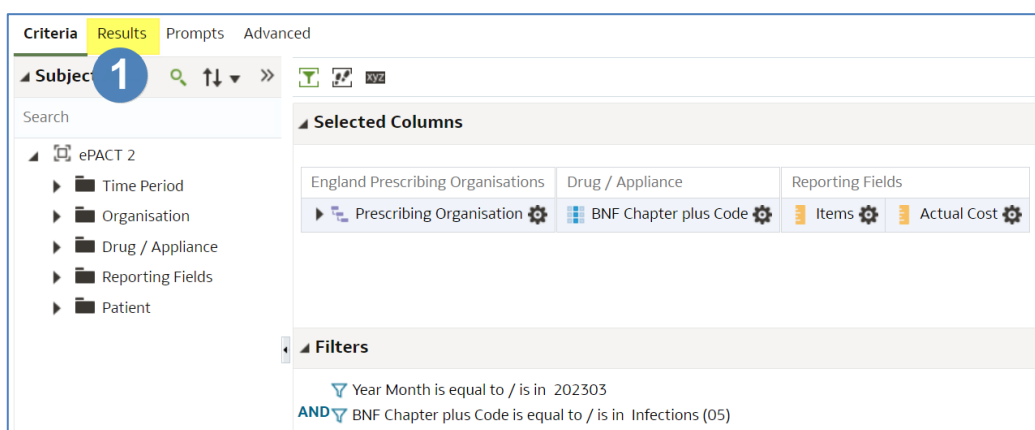
> ⚠ Results will return slower for analysis containing selection steps.

Selection Steps

Using Selection Steps to limit the data displayed

When you have used a 'Hierarchy column' within your analysis, 'Selection Steps' can be used to limit the data to only the organisation/BNF level required. The results can then be expanded to show data at multiple levels.

1.   Set up your analysis with the required columns of data and the required

hierarch column, then navigate to the results pane via the 'Results' tab.
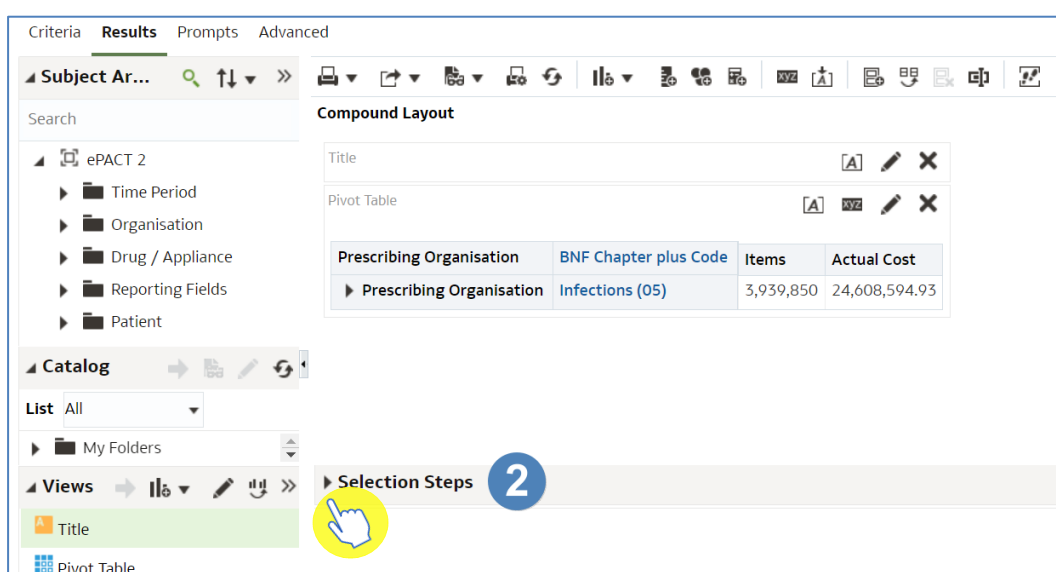

> ⚠ In this example we are running the data for March 2023 and Chapter 5, returning data for Items and Actual Cost.

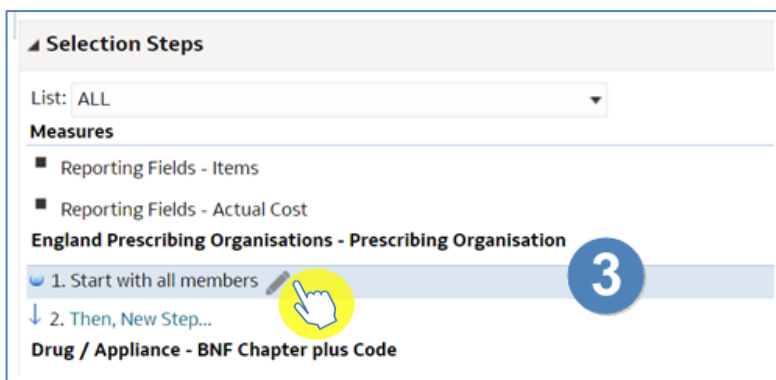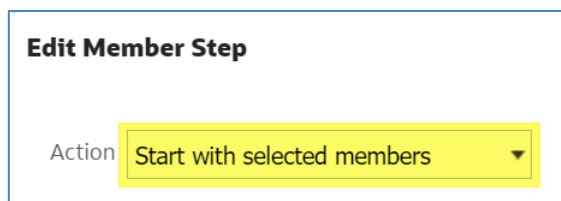2.   Click the arrow to expand the 'Selection Steps' pane.

3.   The default 'Selection Steps' for the Organisation hierarchical column or BNF hierarchical column will be displayed.

4.   Hover the curser over 'Start with all members' to bring up the 'pencil' icon and select this icon to allow you to edit the field.

⊿ **Selection Steps**

List: ALL

Measures

■ Reporting Fields - Items

■ Reporting Fields - Actual Cost

England Prescribing Organisations - Prescribing Organisation

◡ 1. Start with all members ✎ ③

↓ 2. Then, New Step...

Drug / Appliance - BNF Chapter plus Code

5.   You will now be prompted with the 'Edit Member Step' pane. Ensure the 'Action' is set to 'Start with selected members'.

Edit Member Step

Action [Start with selected members ▼]

6.   Select the search icon to expand the search pane.

Edit Member Step

Action [Start with selected members ▼]
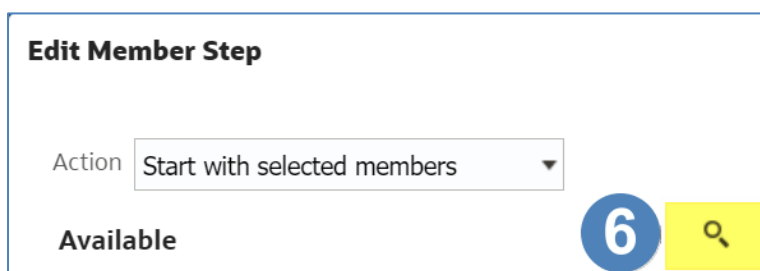
Available ⑥ 🔍

7.   Search for the required overall organisation or BNF.

❗ In this example the top-level organisation will be NHS North East and North Cumbria ICB 13T (13T00).

8. Highlight the organisation or BNF required in the search results.

9. Use the single arrow icon to select the organisation or BNF.

10. The organisation or BNF will be displayed in the 'Selected' section.

11.   Click 'OK'.

12.   The total figure will now display the organisation selected.

| Prescribing Organisation	BNF Chapter plus Code	Items	Actual Cost
▶ NHS NORTH EAST AND NORTH CUMBRIA ICB - 13T (13T00)	Infections (05)	32,481	230,837.98

13.   Select the 'arrow' icon to expand the organisation to view individual practices.

| Prescribing Organisation	BNF Chapter plus Code	Items	Actual Cost
◢ NHS NORTH EAST AND NORTH CUMBRIA ICB - 13T (13T00)	Infections (05)	32,481	230,837.98
▶	Infections (05)	112	1,378.56
▶	Infections (05)	316	2,610.68
▶	Infections (05)	654	4,018.89
▶	Infections (05)	250	1,662.24
▶	Infections (05)	857	5,232.04
▶	Infections (05)	415	2,784.93
▶	Infections (05)	597	3,488.43
▶	Infections (05)	783	7,175.24
▶	Infections (05)	296	3,019.96
▶	Infections (05)	553	4,497.73
▶	Infections (05)	605	4,220.48
▶	Infections (05)	150	1,094.52

Including total for groups of organisations/BNF

Selection Steps can also be used to include totals figures for groups of organisations or multiple BNF selections.

1.   From the results pane select the arrow to expand the 'Selection Steps'.
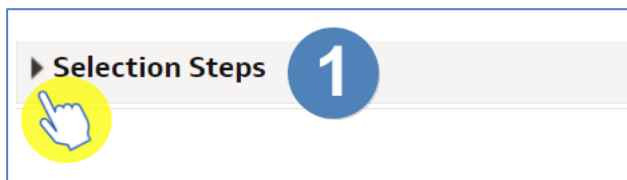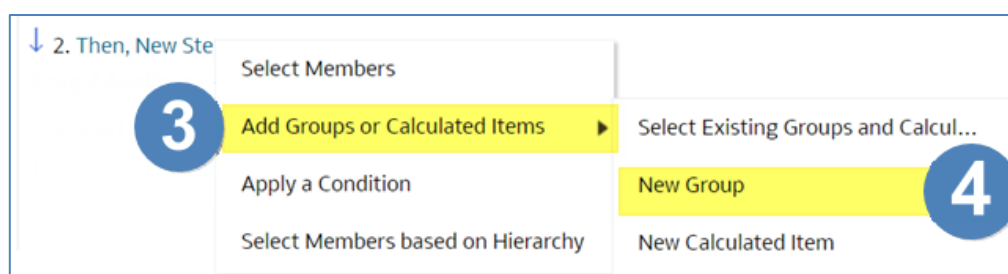

2.   Select the 'Then, New Step' link to add a further step.
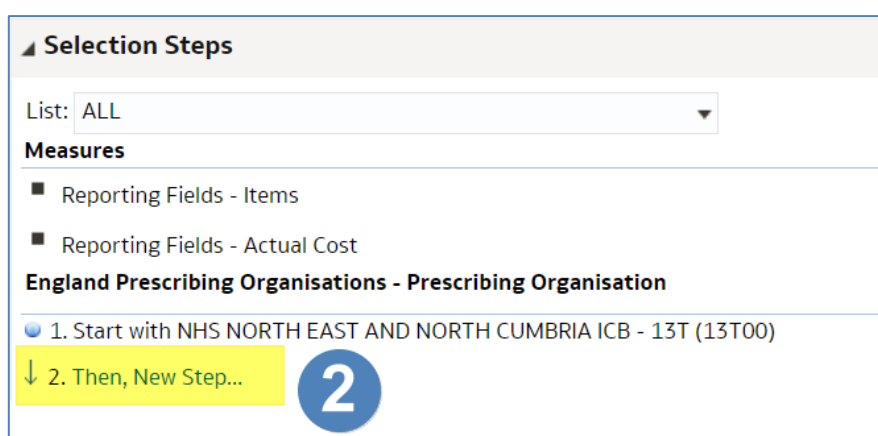
3.   From the drop-down list select 'Add Groups or Calculated Items'.

4.   From the next drop-down list select 'New Group'.

5.   You will now be presented with the 'New Group' pane, select the search icon to expand the search pane.

6.   Search for the required organisation or BNF.

7.   Highlight the organisations or BNF required in the search results. (Organisations or BNF's can be expanded within the search results).

8.   Once selected use the arrow key to move the organisations/BNF to selected.

9. The organisations will be displayed in the 'Selected' section.
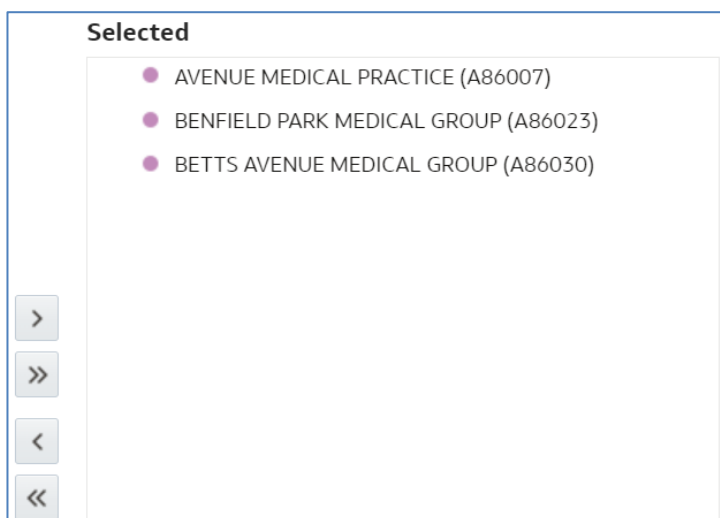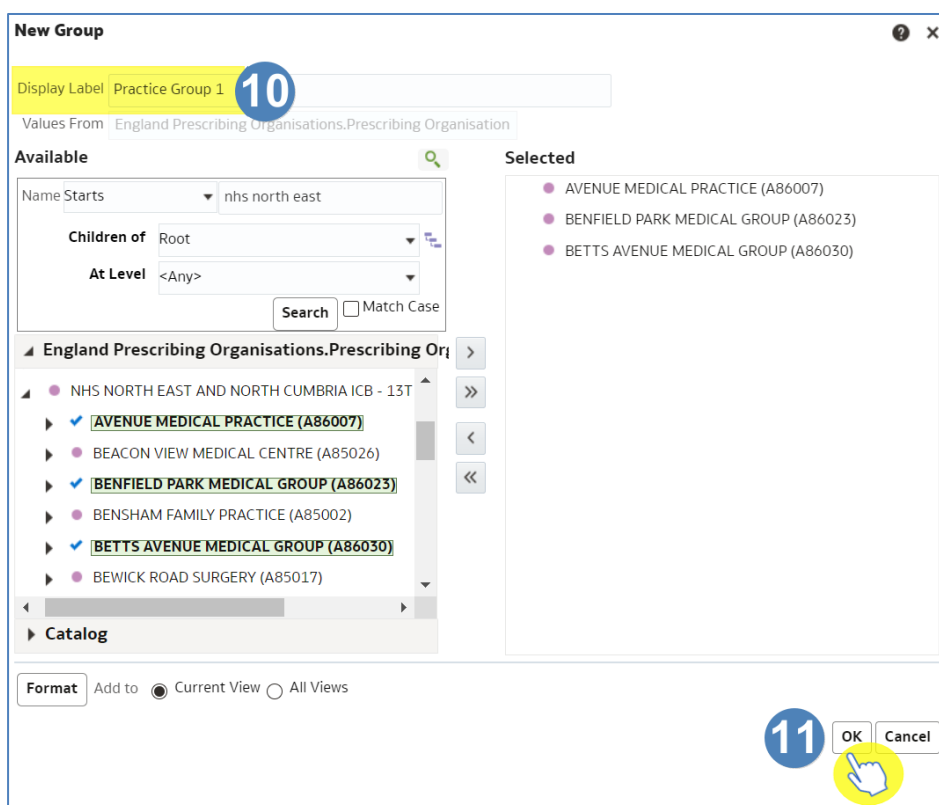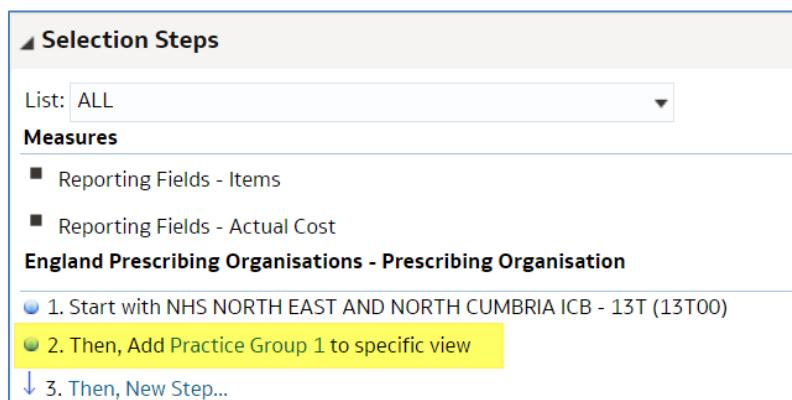

10. Enter an appropriate name in the 'Display Label' section.

11. Click 'OK'.

12. The group created will now be displayed in the selection steps pane.

13. The group created will now be displayed in the results.

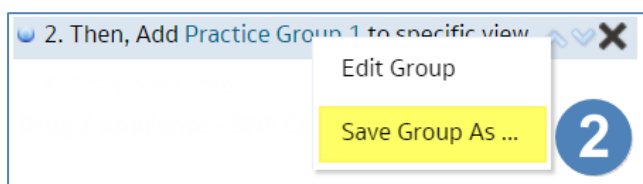14. The steps above can then be repeated to include all groupings required.

Saving Groups for use in future analysis

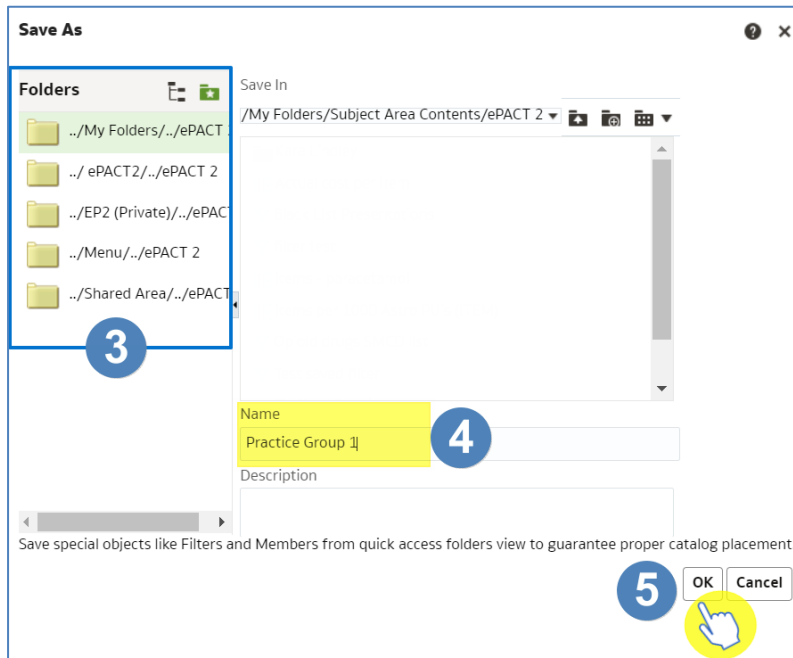Once created, groups can be saved and then reused in future analyses.

1. Click the link for the group.
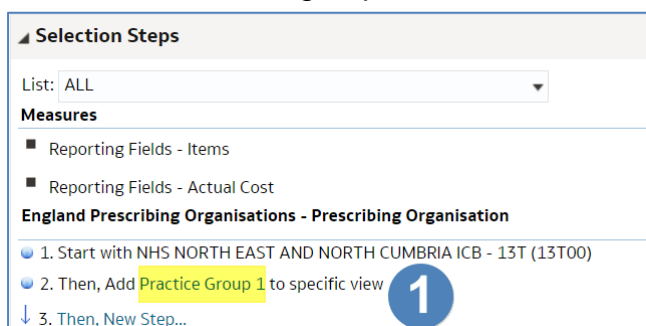
2. Select 'Save Group As' from the drop-down list'.

3. Select an appropriate folder to save the group in.

4. Enter an appropriate name for the group.

5. Click 'OK'.

Re-using Saved Groups

It is possible to use saved groups in other analysis, enabling you to create the group once and use in multiple reports.

> You can only use a saved group for the column it has been created and saved under i.e. you can only use a group of practices you have created in the 'England Prescribing Organisation' column, in this column on other analysis.

1. Select the 'Then, New Step' link to add a further step.
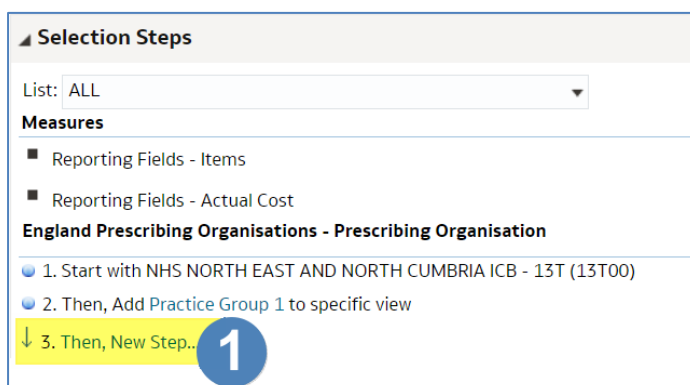
2.   From the drop-down list select 'Add Groups or Calculated Items'.

3.   From the next drop-down list select 'Select Existing Groups and Calculated Items'.
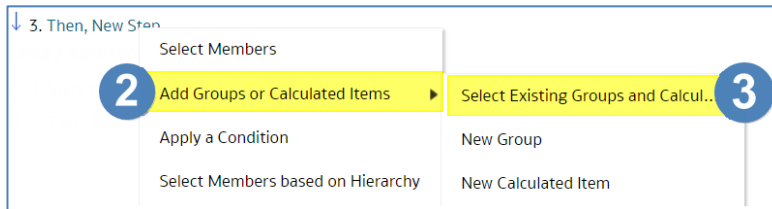
4.   Select the group from the saved location.

5.   Use the arrow icon to select the group.
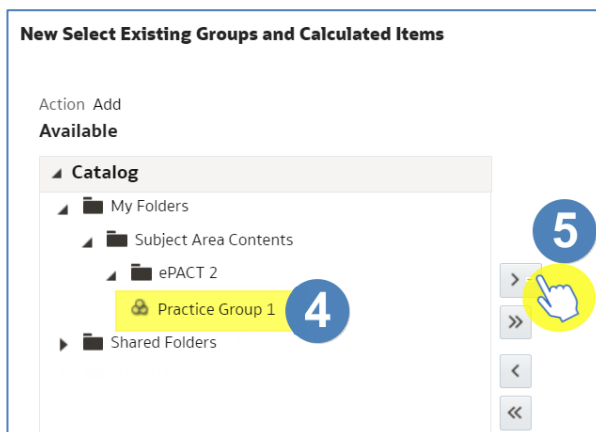
6.   The group selected will be displayed in the 'Selected' section.

7.   Click 'OK'.
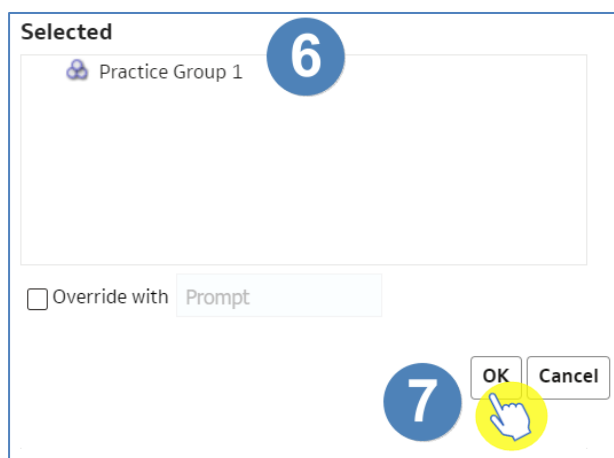
8.   The new group added will now be displayed in the selection steps pane, and your results pane.

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