ePACT2
Hospital Trust / Provider
Quick start guide

How to start using the ePACT2 system and create a basic analysis

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1. Accessing the System.

ePACT2 can be accessed via a standard internet connection, however to ensure the best performance when using the system the latest fully updated version of your chosen Internet Browser should be installed.

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

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

The User name associated with account is the email address of the registered user.

A temporary password will be supplied in the activation email.

Use the link contained within the email to access the system. This link should be saved as a favourite for future access of the system.
Enter the user ID (email address) and temporary password provided in the email.

Select the ‘Sign In’ option to access the system.

The user will be directed to the ‘Oracle Identity Self Service – Password Management’ page to complete the activation process.

Enter the temporary password provided and select a new password.

Select 3 security questions and provide answers to these questions; these questions will be used to reset any forgotten passwords.

Security questions must be selected from the drop down list available.

Once all information has been completed select ‘Submit’
If any information entered does not match the requirements of the system an error message will be presented.

The field which requires amending will be highlighted.

Language and Time Zone preferences should be saved to complete the activation process.

The user will then be presented with the Oracle Cloud Home page.
Select the ‘Oracle Business Intelligence Cloud Service’ option to access ePACT2.

The first time the system is accessed the user will be presented with an overview of the home page.

Select the > icon on the right hand side to move through the slides.

Once complete the user will be presented with the system Home page.
2. The Home Page.

Access different areas of ePACT2 using the navigation icons.

<table>
<thead>
<tr>
<th>Catalog</th>
<th>Access the available catalogue folders</th>
</tr>
</thead>
<tbody>
<tr>
<td>Analyses</td>
<td>View list of analyses available to you and create new analysis</td>
</tr>
<tr>
<td>Dashboards</td>
<td>View list of all dashboards available to you</td>
</tr>
<tr>
<td>Academy</td>
<td>Access to user guides</td>
</tr>
</tbody>
</table>

16 ‘Recent’ shows your recently accessed content.
17 ‘Favourites’ shows content saved as a favourite.
18 Search is available for ePACT2.
19 Create new analysis, dashboards, filters & dashboard prompts
3. How to access your saved content

You can access your saved content through links in the ‘Dashboard’, ‘Recent’, ‘Most Popular’ or ‘Favourites’ sections of the homepage.

You can also access the content by using the ‘Catalog’.

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20 Click ‘Catalog’.

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The folders that are available will be displayed in the ‘Folders’ pane.

The default setting will show content that is saved within ‘My Folders’, but you can search elsewhere.

The administration tools for folders are in the ‘Tasks’ pane. The tools that are available will depend on your permissions.

Expand any folder by clicking the arrow icon next to it.

Select the folder you want.

The content contained within the folder will be displayed.

Content can be opened or edited directly from the ‘Catalog’ page.

Extra content administration tools can be accessed under the ‘More’ option, click on the arrow next to it to see a drop down list.
4. Create a basic analysis

Select ‘Analyses’.

Select ‘Create Analysis’.

The ‘Select Subject Area’ pane will appear.

Select your required Subject Area.
The ‘Analysis Builder’ will open.

The available Dimensions / Facts are listed in the ‘Subject Areas’ pane.

Expand any Dimension / Fact by clicking the arrow icon next to it.
To select a field, either ‘double click’ on the required field or ‘click and drag’ the field into the ‘Selected Columns’ pane.

Once selected the columns will appear in the ‘Selected Columns’ pane.

Additional tools such as Sort / Filter / Delete are available under the options tab.

The options drop down list will display all tools available to the user.

All fields required in the report can then be added.
The report will default to show data for all time periods / organisations / drug/appliances available within the system.

To limit the results to a particular time periods, organisations or BNF level filters will need to be applied to the relevant column.

5. Filtering – add a filter to a column

In the ‘Selected Columns’ pane, click on the cog icon in your required column for example ‘Time Period’.

Select ‘Filter’ from the drop down list.
The ‘New Filter’ pane will appear.

40 The ‘Operator’ will default to ‘is equal to / is in’. This value can be changed.

41 Click the search icon to view the ‘Values’ you can use for filtering.

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Highlight the values you need. Multiple values can be selected by holding the ‘Cntrl’ button as you select.

Once you have highlighted the values you need, use the > arrow icon to select the value.

The value selected will appear in the ‘Selected’ pane.

Select ‘OK’ to confirm the selection.

The ‘Value’ will display the selected month.

Select ‘OK’ to confirm the selection.

The filter will now appear in the ‘Filter’ pane.
6. Run the analysis

Once the selection is complete you can view the results by selecting ‘Results’.

Click ‘Results’ to run the analysis.

The results will be displayed in the ‘Compound Layout’ pane in the default table view.

Additional views and formatting can be added to the analysis in the ‘Results’ tab.
7. Add additional views

You can now add additional views to the analysis.

Select ‘New Views’.

The drop down list will show you the views you can choose from.

The additional view will be added to the ‘Compound layout’ below the existing view.
8. Save the analysis

To save the analysis click the ‘Save As’ icon.

Select the ‘Folder’ the analysis is to be saved in.

Give the analysis an appropriate name.

Select ‘OK’ to save the analysis.
9. Reconciling an Invoice.

Guidance on reconciling an invoice received from the NHSBSA is available at [https://www.nhsbsa.nhs.uk/prescription-data/understanding-our-data/invoice-reconciliation-data](https://www.nhsbsa.nhs.uk/prescription-data/understanding-our-data/invoice-reconciliation-data)

ePACT2 is not required to reconcile your invoice, however if you wish to access presentation level data at individual unit/cost centre level this can be accessed via ePACT2.

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58. Select ‘Catalogue’ from the ePACT2 default home page.

59. Select the ‘Company Shared’ folder.

60. [Diagram]

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63. [Diagram]
Expand the ‘ePACT2 NHSBSA Template’ folder.

Double click the ‘Useful Reports’ folder to display contents.

The ‘Prescriber Dispenser’ report will be available to select.

Select ‘Open’ under the report to access.

A prompt for the report will open to allow the user to select the ‘Time Period’, ‘Organisation’ and ‘BNF Level’ required.

Use the ‘Time Period’ prompt to select the time period required. Multiple time periods can be selected. The prompt will default to the latest time period available.

Use the ‘Organisation’ prompt to select the organisation required. Multiple organisations can be selected. The prompt will default to the organisation the user is registered under. The ‘Prescriber Dispenser’ report will only return information for organisations the user is registered under.

Use the ‘BNF Level’ prompt to select the BNF level required. If no BNF level is selected the report will generate for the entire BNF.

Select ‘OK’ to confirm the prompt selections and generate the report.
The report will open providing presentation level information for each prescriber under the organisation for the time period selected.

Select ‘Print’ to display the print formats available.
Select ‘Export’ to display the export formats available.

Additional information
You can find more information about ePACT2 at https://www.nhsbsa.nhs.uk/epact/epact2 including additional user guides.

Contact us
If you have any questions about ePACT2 we are available Monday to Friday 08:30-16:30.
Telephone: 0191 203 5050
Email: nhsbsa.help@nhs.net