ePACT2 guide

Using Selection Steps to show data totalled at multiple organisation/BNF levels within an analysis
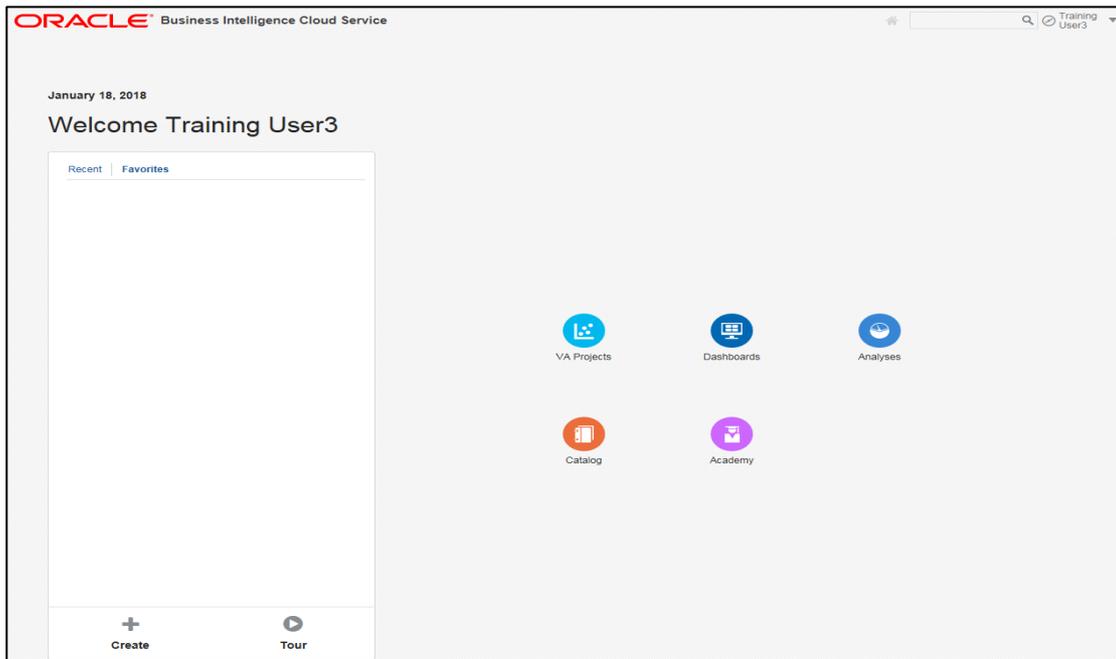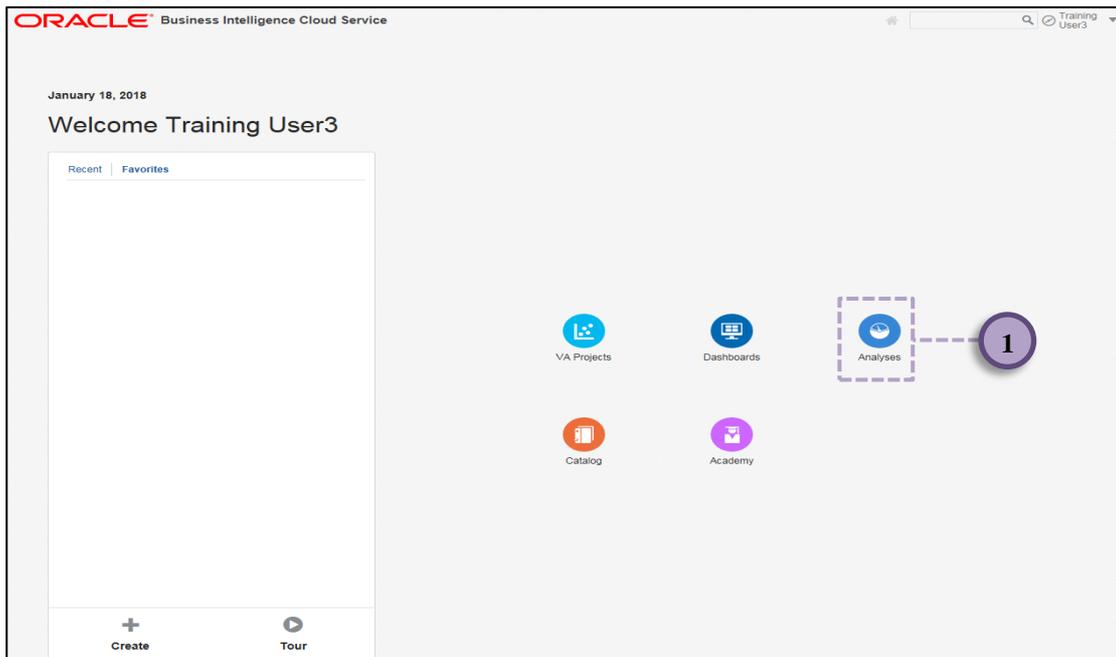
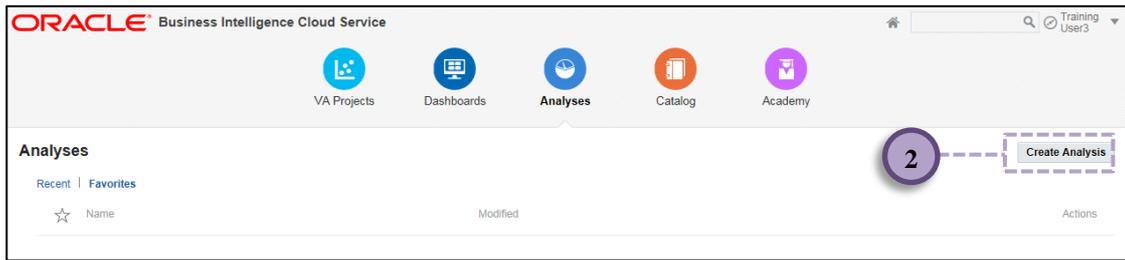## Contents

1. Getting started
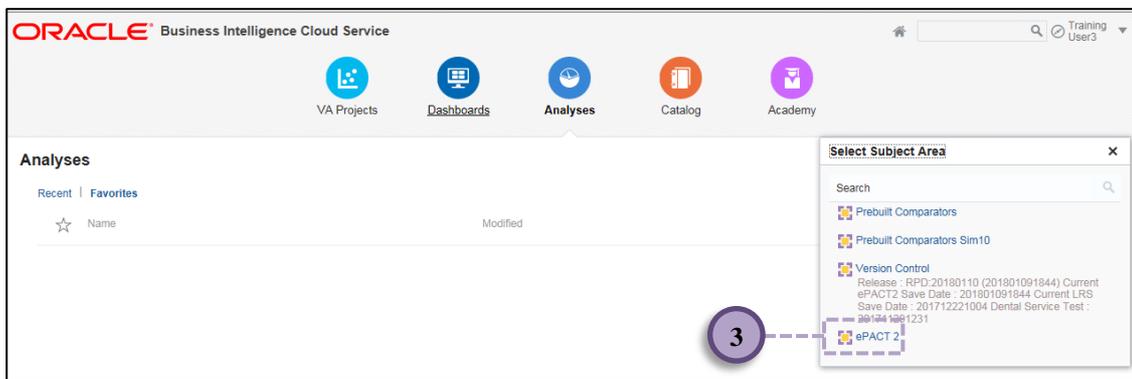
Log in to ePACT2.

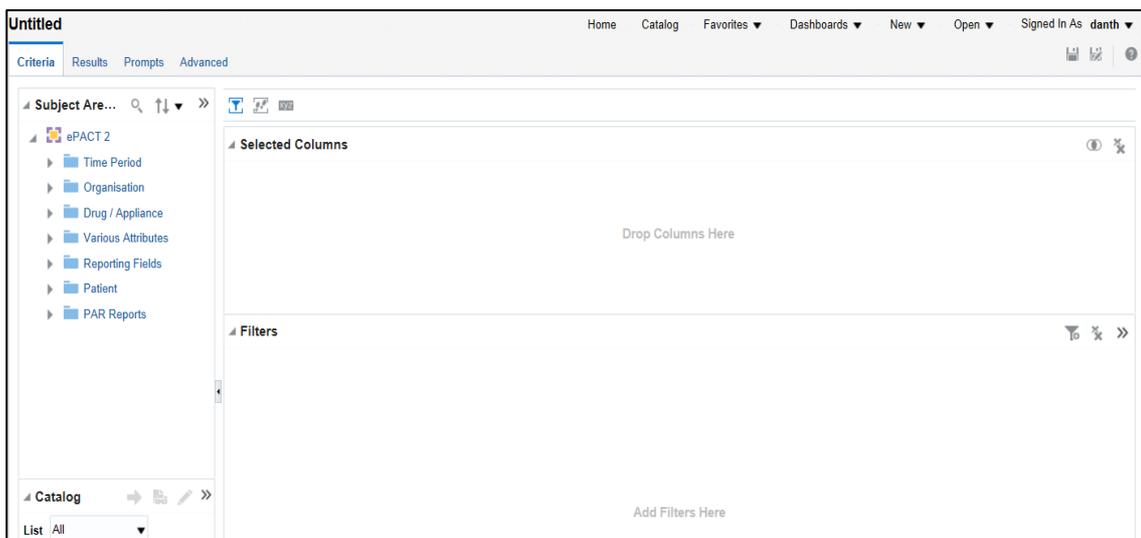This will open the homepage.

2. Create a basic analysis

2

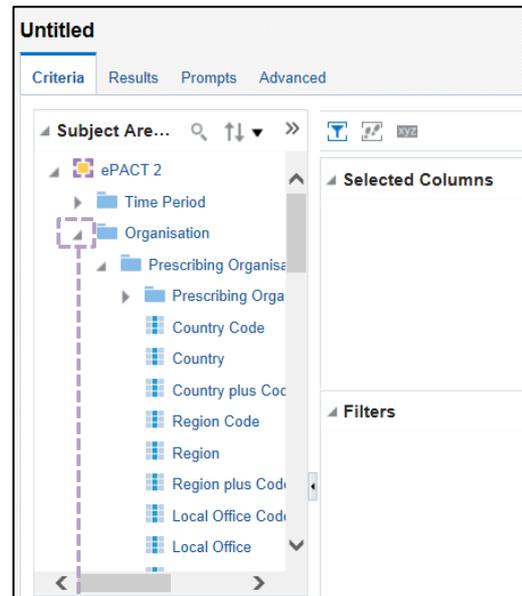① Select 'New.'

② Select 'Analysis' from the drop down list.

The 'Select Subject Area' pane will appear.

③ Select your required Subject Area.

The 'Analysis Builder' will open.

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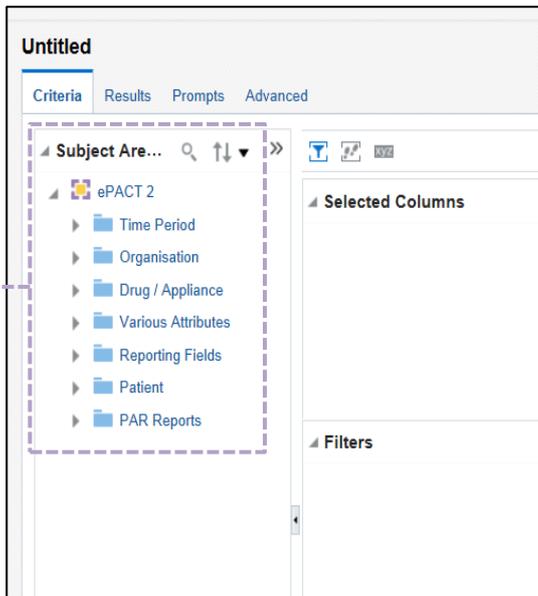
4 The available Dimensions / Facts are listed in the 'Subject Areas' pane.

5 Expand any Dimension / Fact by clicking the arrow icon next to it.

6 To select a field, either 'double click' on the required field or 'click and drag' the field into the 'Selected Columns' pane.

7 Once selected, the fields will appear in the 'Selected Columns' pane.

4

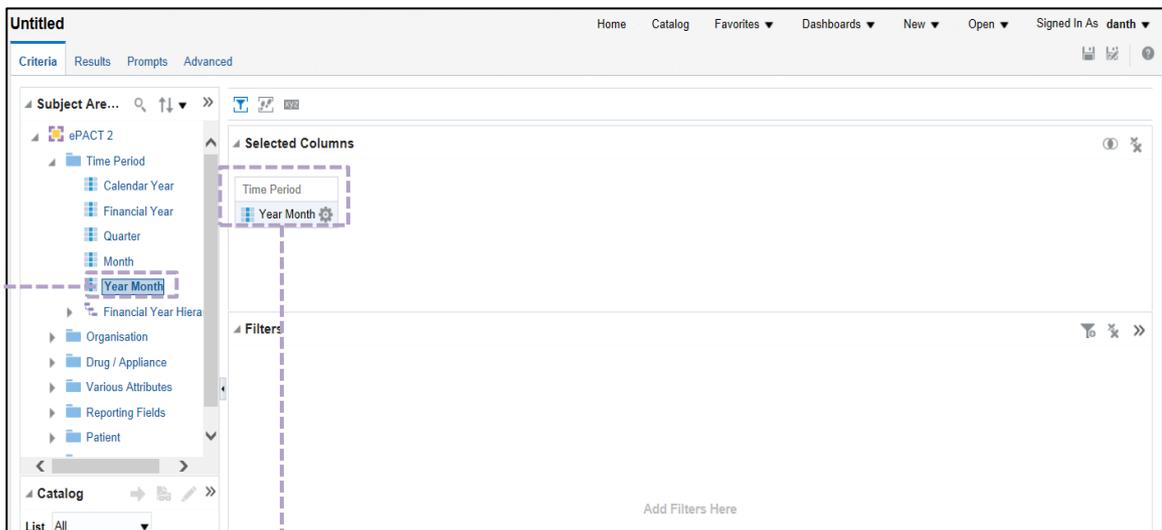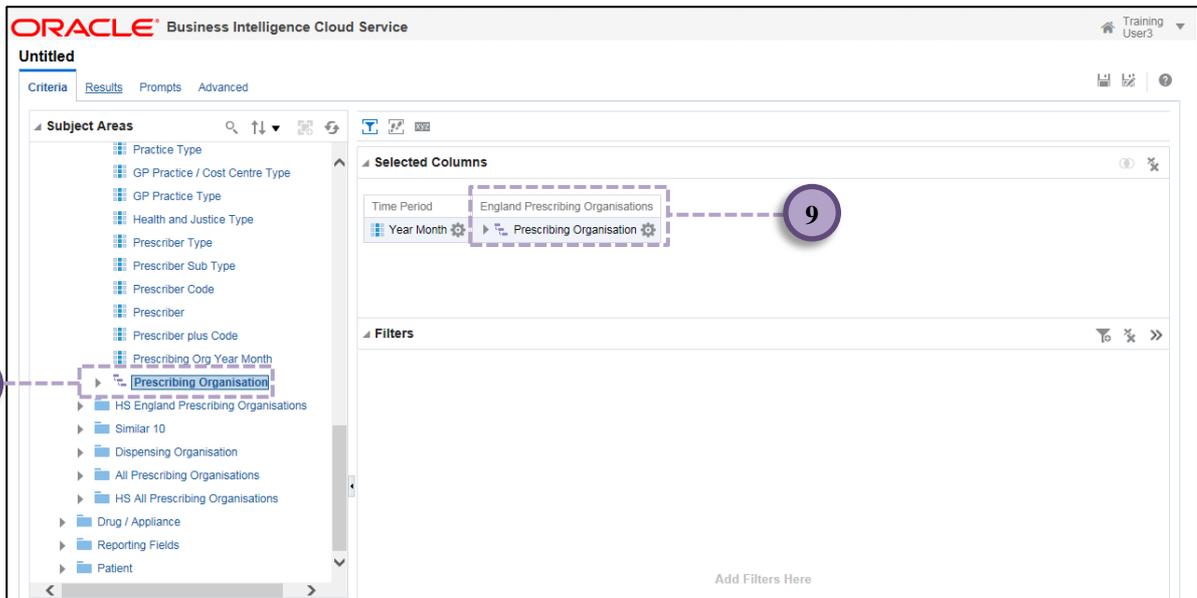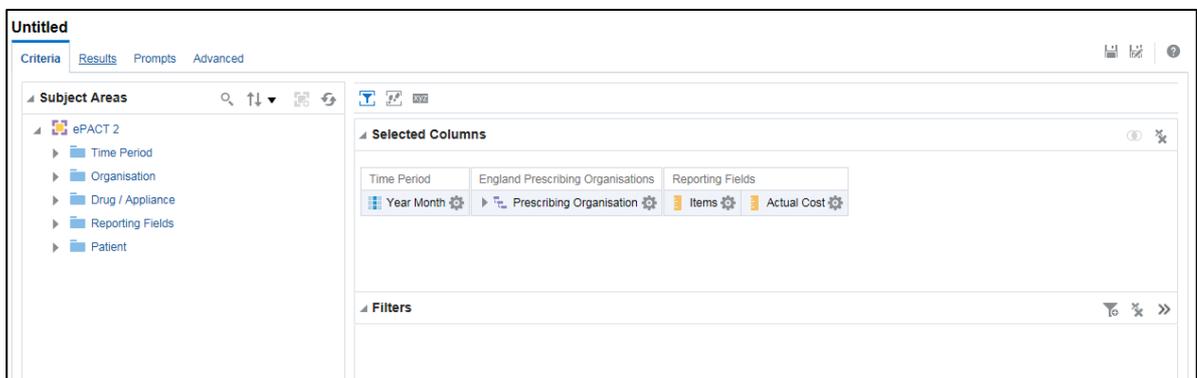**8** To include multiple levels of organisations or the BNF the appropriate 'Prescribing Organisation' or 'BNF – Hierarchy' hierarchical column should be selected.

**9** The selected fields will be appear in the 'Selected Columns' pane.

Make sure that you select fields for 'Time Period' and 'Reporting Fields'.


When initially generated this report will show the 'Items' and 'Actual Cost' for all organisations nationally for all 'Months' available in ePACT2.

3. Filtering – to limit the results to a specific 'Time Period'
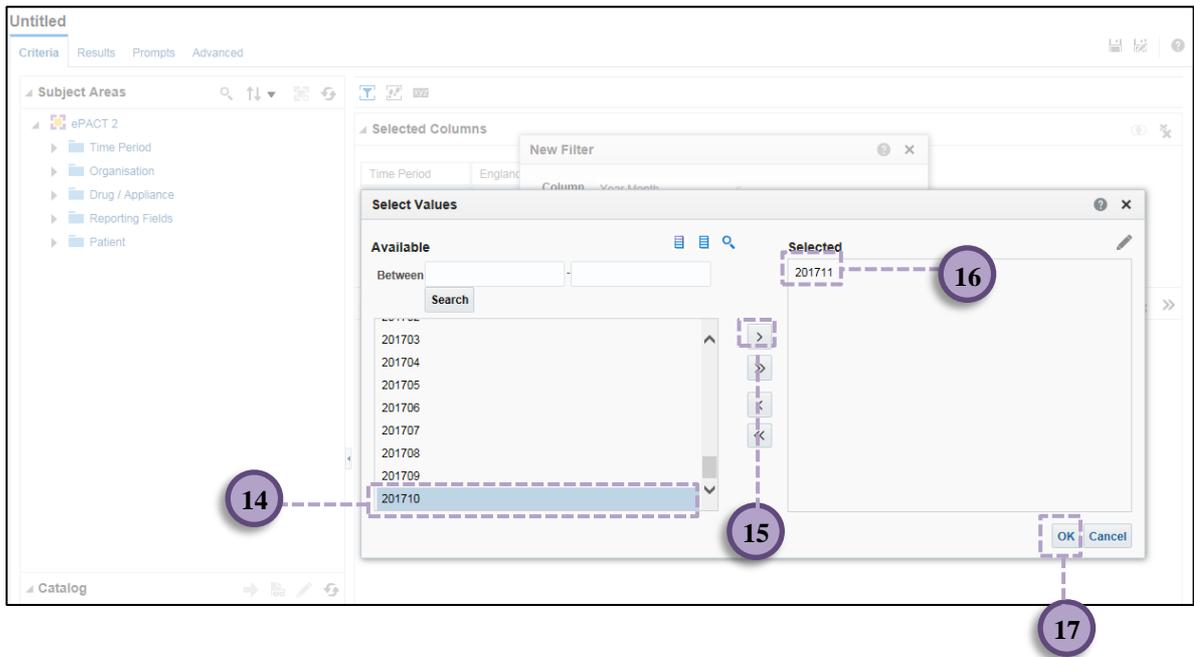
Add filter – to limit the results to a specific time period
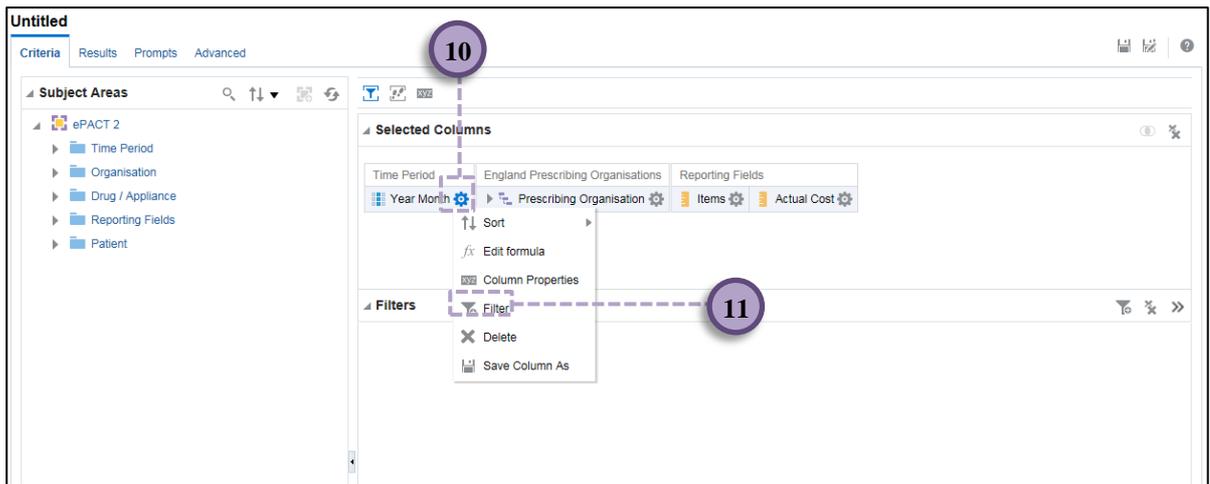
10 In the 'Selected Columns' pane, in the 'Time Period' column click on the cog icon next to 'Year Month'.

11 Select 'Filter' from the drop down list.
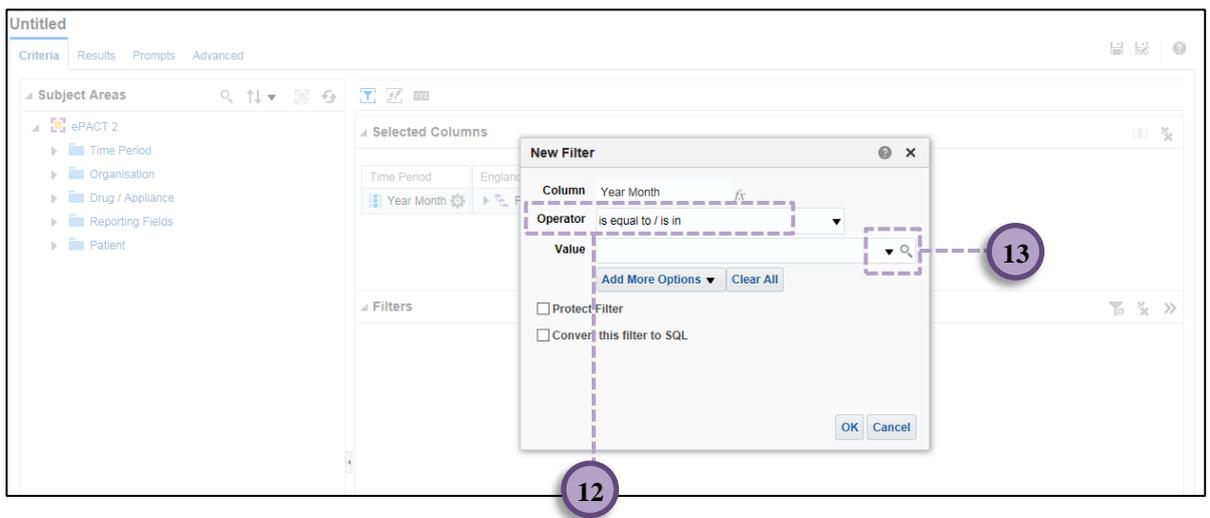
12 The 'Operator' field will default to 'is equal to / is in'. This value can be changed.

13 Click the search icon to view the 'Values' you can use for filtering.

14 Highlight the values you need. Multiple values can be selected by holding the 'Ctrl' button as you select.

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

16 The value will appear in the 'Selected' pane.

17 Select 'OK' to confirm the selection.
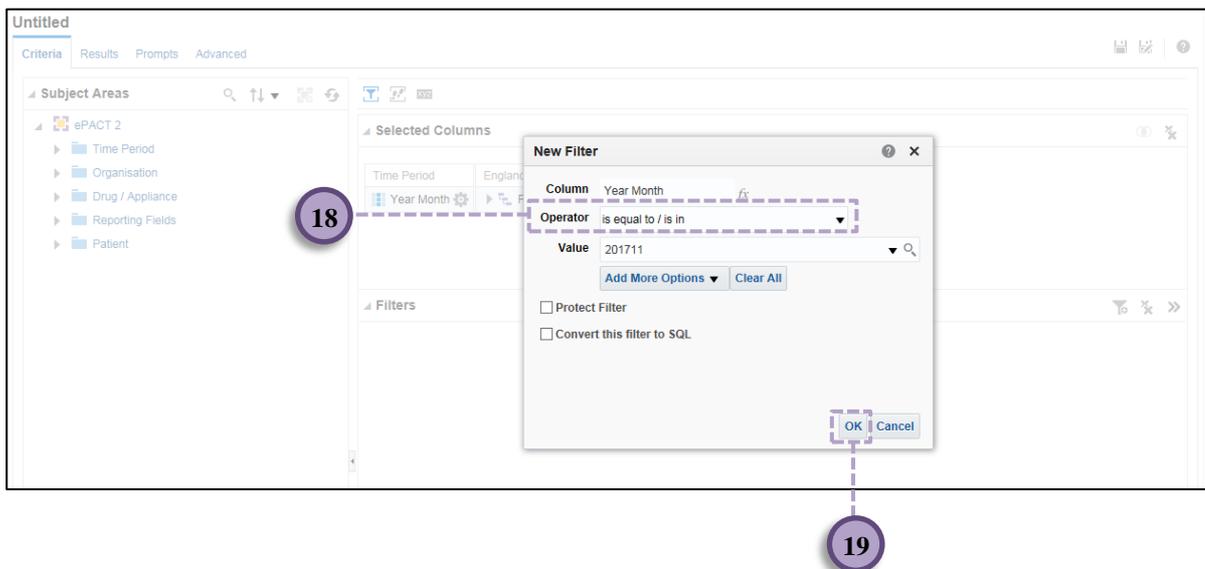
18 The 'Value' will display the selected month.

19 Select 'OK' to confirm the selection

7
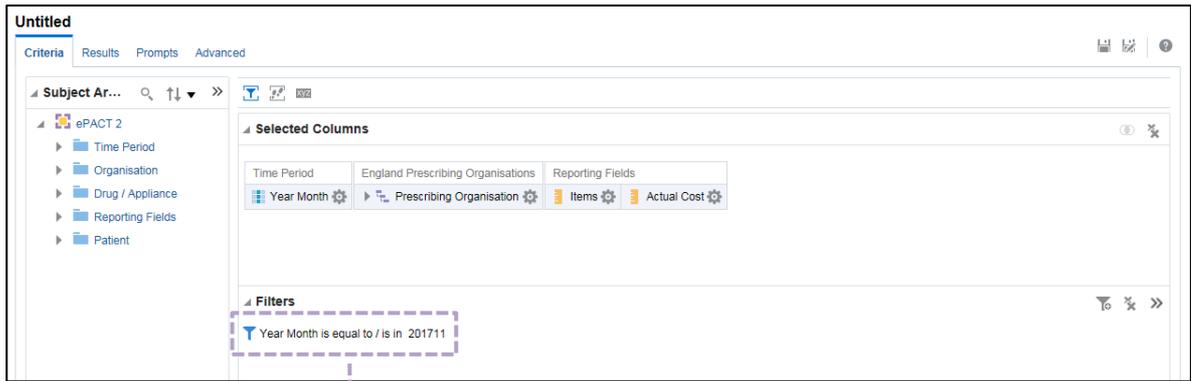
20 The filter will now appear in the 'Filter' pane.

4. Filtering – to limit the results of the analysis to an overall organisation level.

The analysis will return information for all organisations nationally however if all organisation fall under a specific organisation the analysis can be filtered to limit data to this organisation.
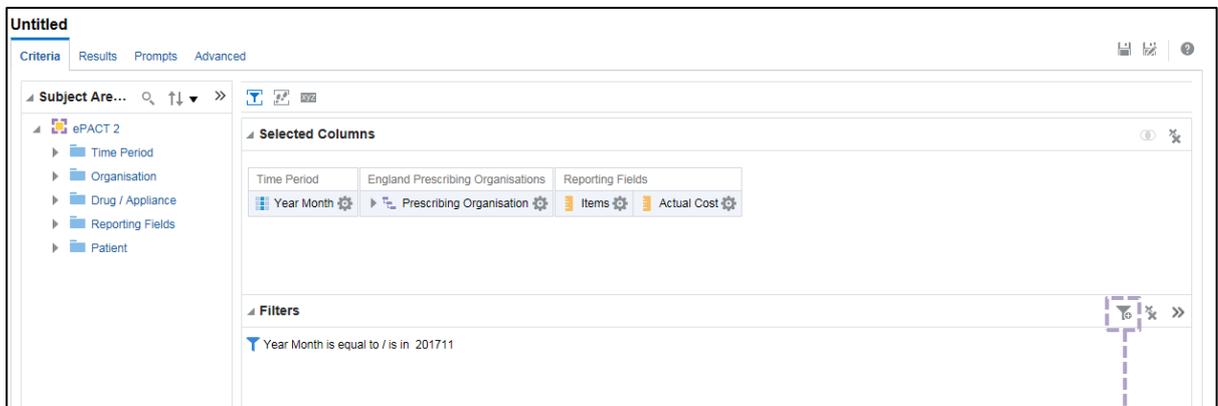
21 Click the 'Filter' icon within the 'Filters' pane.

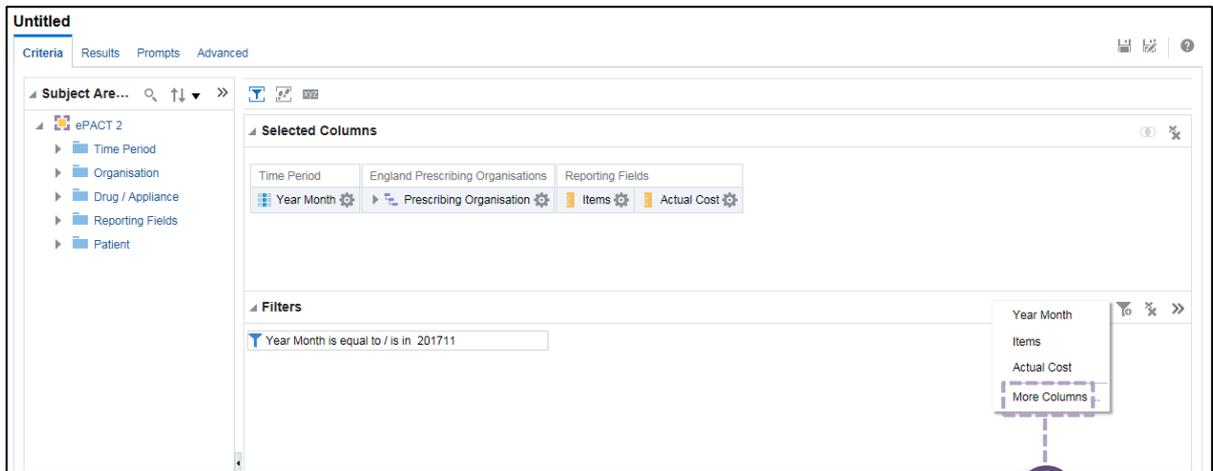**22** Select 'More Columns' from the drop down list.
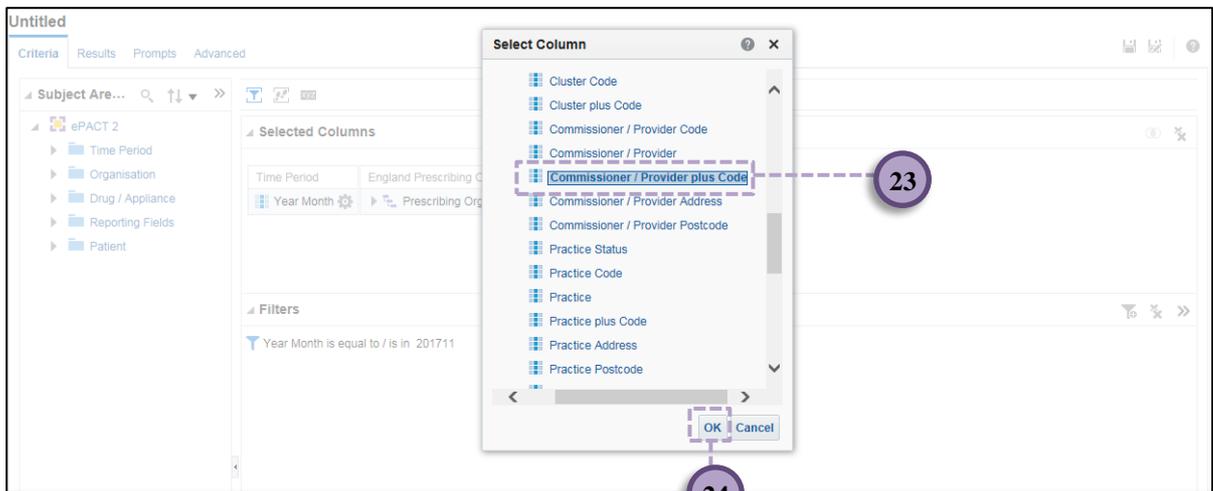
23 In the 'Select Column' pane select the column you need.

24 Click 'OK' to confirm the selection.

The 'New Filter' pane will be displayed, repeat the process in section 3 to add a new filter for a particular organisation.

(25) The filter will now appear in the 'Filter' pane.
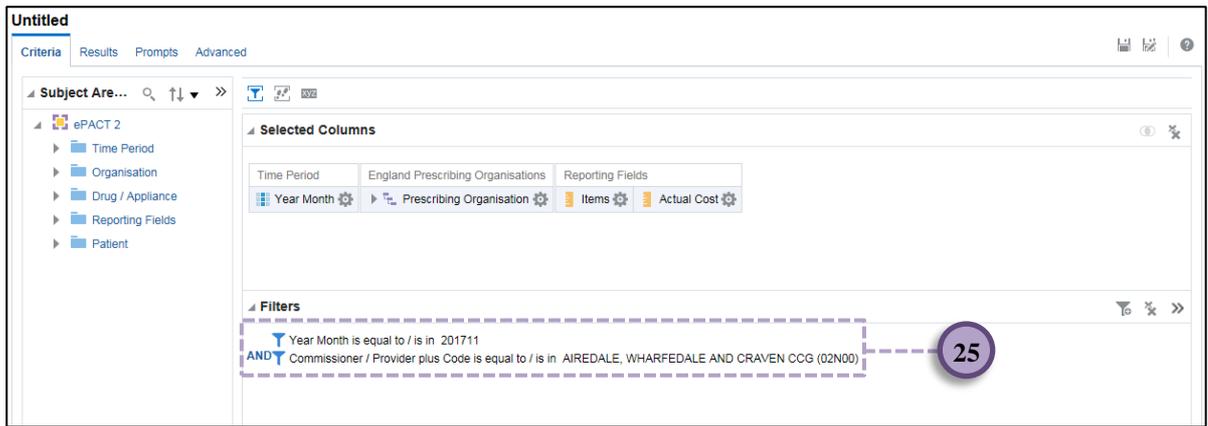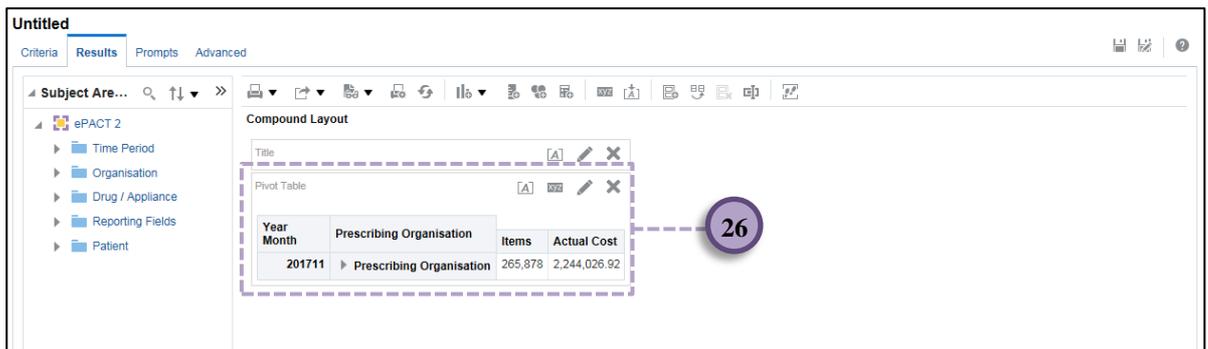
5. Run the analysis

Once all columns and filters have been selected you can view the results by selecting 'Results'.

(26) The results will be displayed in the default Table view. The analysis will show data at a total level, the total will be limited to organisation the analysis is filtered by.

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6. Using Selection Steps to limit the data displayed

Selection Steps can be used to limit the data to only the organisation/BNF levels required. The results can then be expanded to show data at multiple levels.
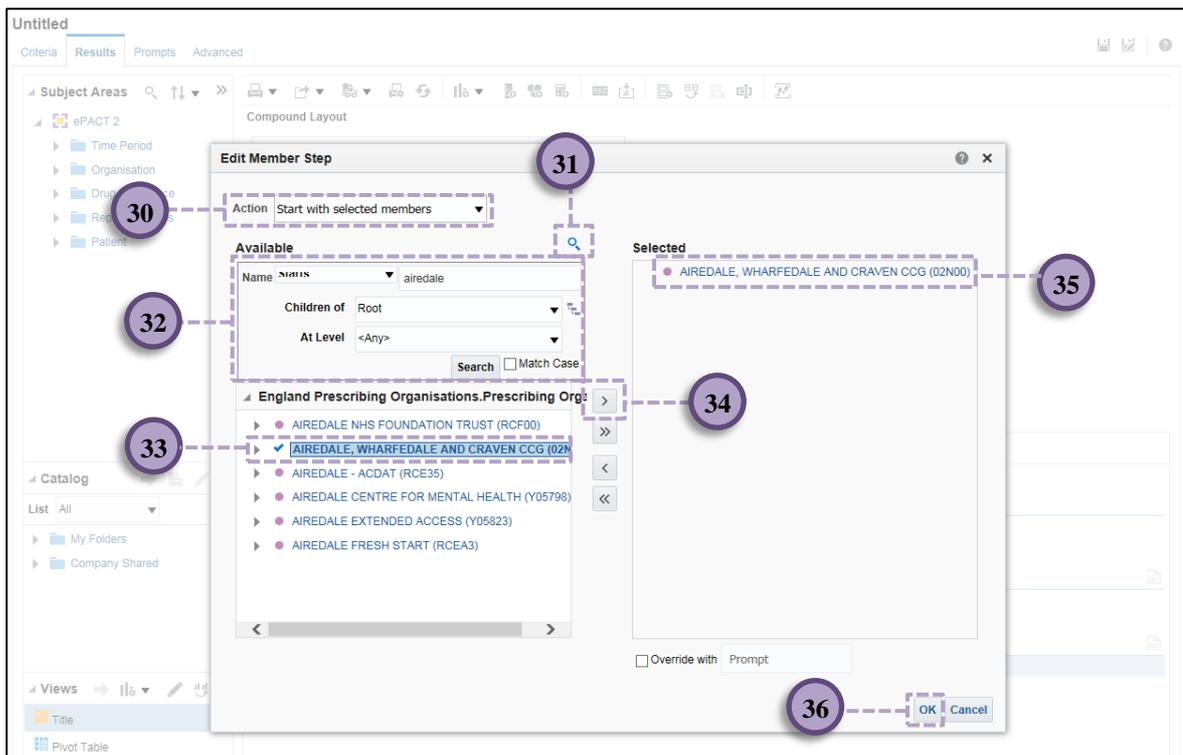

27 Click the arrow to expand the 'Selection Steps' pane.

28 The default 'Selection Steps' for the organisation or BNF hierarchical column will be displayed.

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

11

30 Ensure the 'Action' is set to 'Start with selected members'

31 Select the search icon to expand the search pane

32 Search for the required overall organisation or BNF; ensure 'match case' is unselected

33 Highlight the organisation or BNF required in the search results

34 Use the arrow key to select the organisation or BNF

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

36 Click 'Ok'

37 The total figure will now display the organisation selected

38 Select the 'arrow' icon to expand the organisation

7. 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.

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39 Click the arrow to expand the 'Selection Steps' pane if it is not already expanded

40 Select the 'Then, New Step' link to add a further step
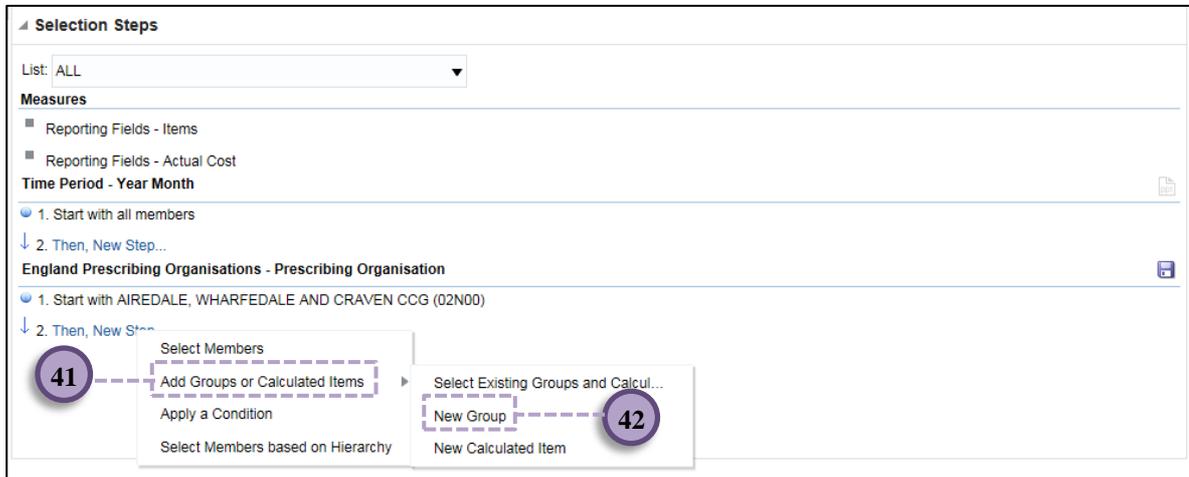
41 From the drop down list select 'Add Groups or Calculated Items'

42 From the drop down list select 'New Group'
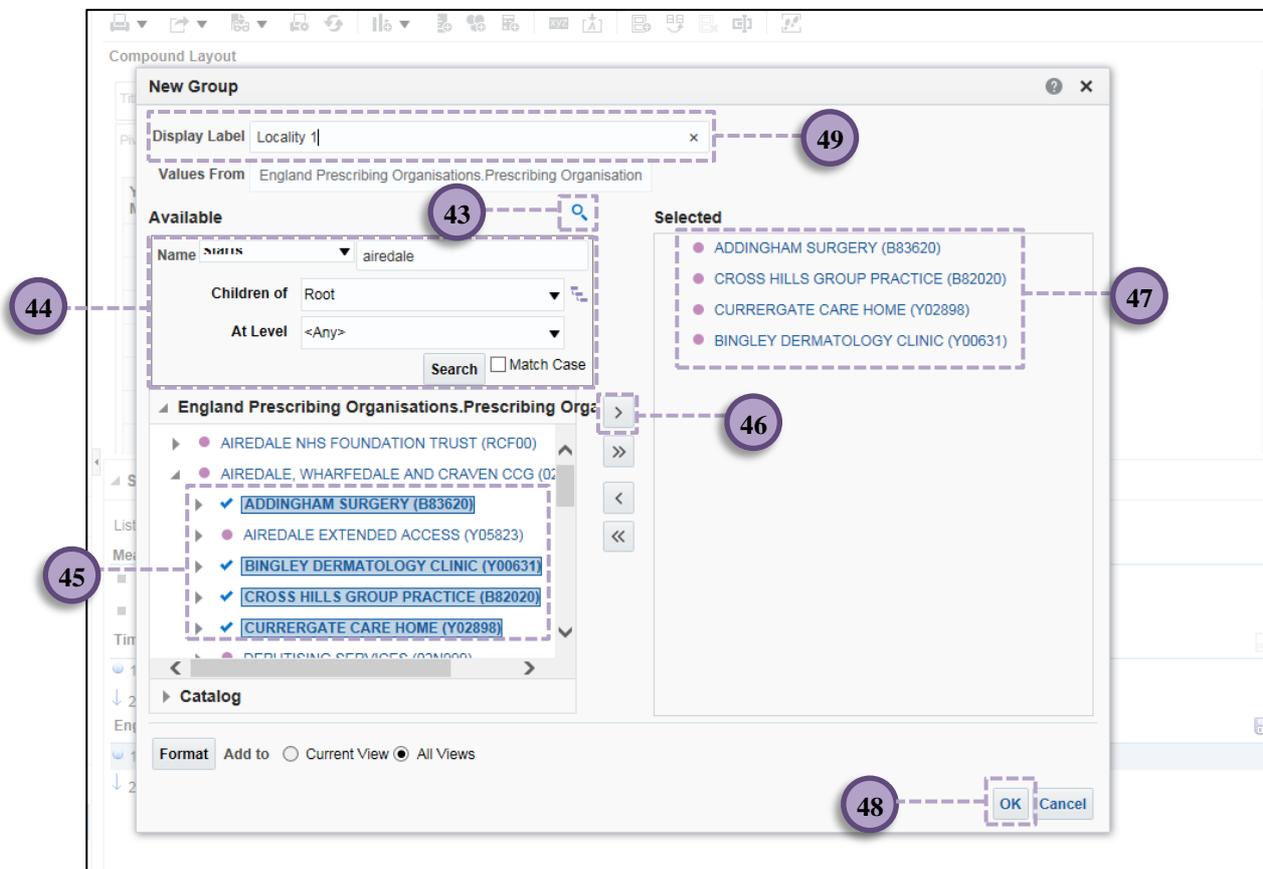
43 Click the search icon to expand the search pane

44 Search for the required organisation or BNF. Ensure 'match case' is unselected

45 Highlight the organisations or BNF required in the search results, organisations or BNF's can be expanded within the search results.

46 Use the arrow key to select the organisations

47 The organisations will be displayed in the 'Selected' section

48 Enter and appropriate name in the 'Display Label' section

49 Click 'Ok'

England Prescribing Organisations - Prescribing Organisation	🖫
1. Start with AIREDALE, WHARFEDALE AND CRAVEN CCG (02N00)	
2. Then, Add Locality 1	
3. Then, New Step...	

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

Compound Layout

Title	[A] ✎ ✕

Pivot Table	[A] xyz ✎ ✕

Year Month	Prescribing Organisation	Items	Actual Cost
201711	▶ HAWORTH MEDICAL PRACTICE (B83027)	17,169	114,554.53
201711	▶ HOLYCROFT SURGERY (B83023)	15,798	140,841.92
201711	▶ I G MEDICAL (B83624)	33,951	268,610.44
201711	▶ ILKLEY & WHARFEDALE MEDICAL PRACTICE (B83002)	5,602	61,441.41
201711	▶ KILMENY GROUP MEDICAL PRACTICE (B83033)	19,431	212,556.10
201711	▶ LING HOUSE MEDICAL CENTRE (B83008)	16,620	146,436.53
201711	▶ NORTH STREET MEDICAL PRACTICE (B83602)	7,768	79,424.26
201711	▶ OAKWORTH MEDICAL PRACTICE (B83061)	5,301	40,149.84
201711	▶ SILSDEN & STEETON MEDICAL PRACTICE (B83006)	21,928	168,931.93
201711	▶ TOWNHEAD SURGERY (B82007)	19,805	154,856.63
201711	▶ UNIDENTIFIED DOCTORS (02N998)	15	118.97
201711	▶ WHARFEDALE DERMATOLOGY CLINIC (Y00630)	66	1,469.50
201711	▶ Locality 1	34,147	236,338.05

51 The group created will now be displayed in the results

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

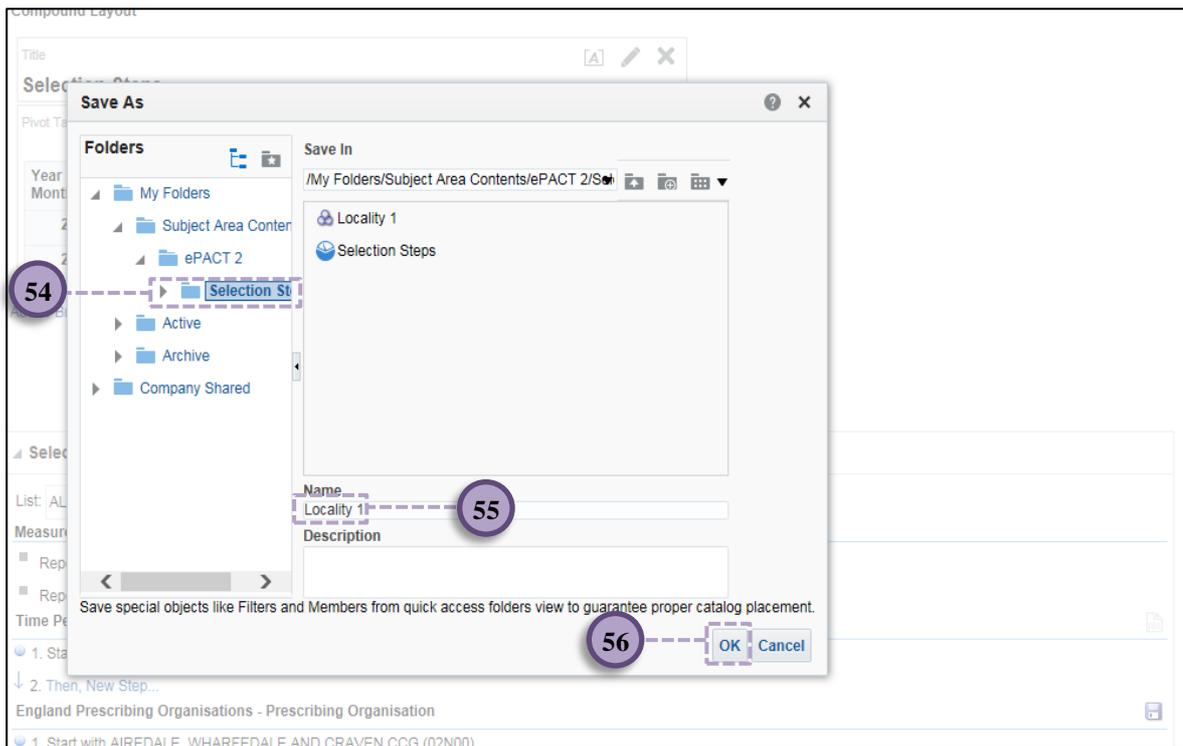# 8. Saving Groups for use in future analysis

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

  Click the link for the group


  Select 'Save Group As' from the drop down list

54 Select an appropriate folder to save the group in

**55** Enter an appropriate name for the group

56 Click 'Ok'

9. Re-using Saved Groups

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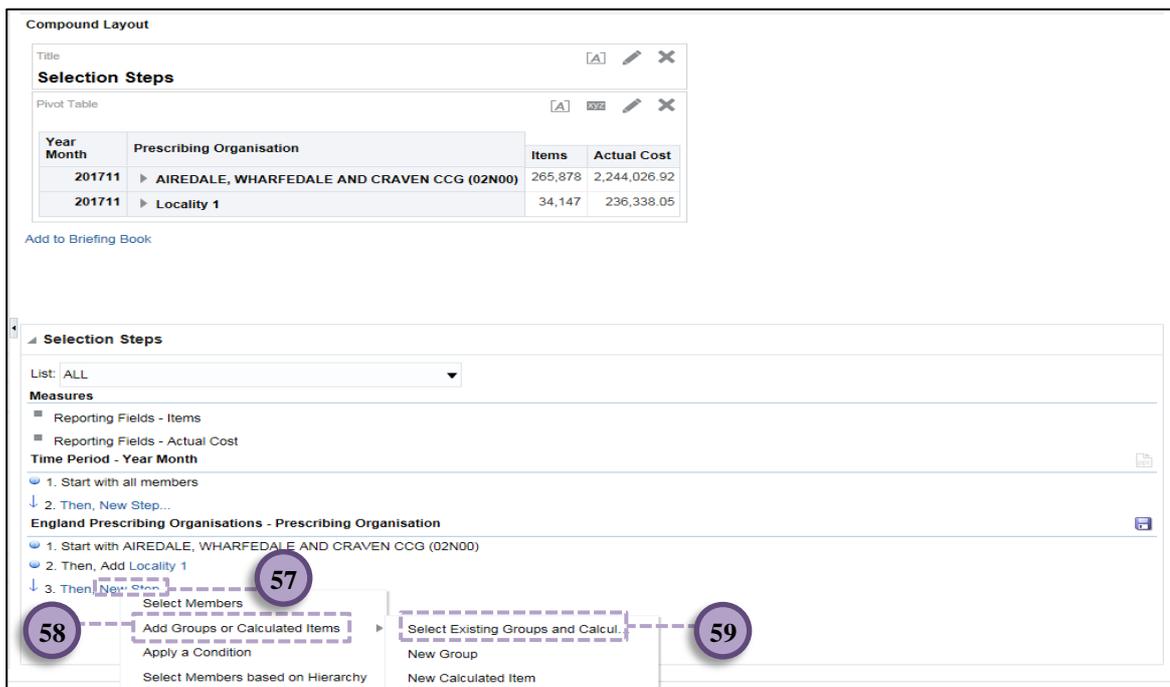
57 Select the 'Then, New Step' link to add a further step

58 From the drop down list select 'Add Groups or Calculated Items'

59 From the drop down list select 'Select Existing Groups and Calculated Items'
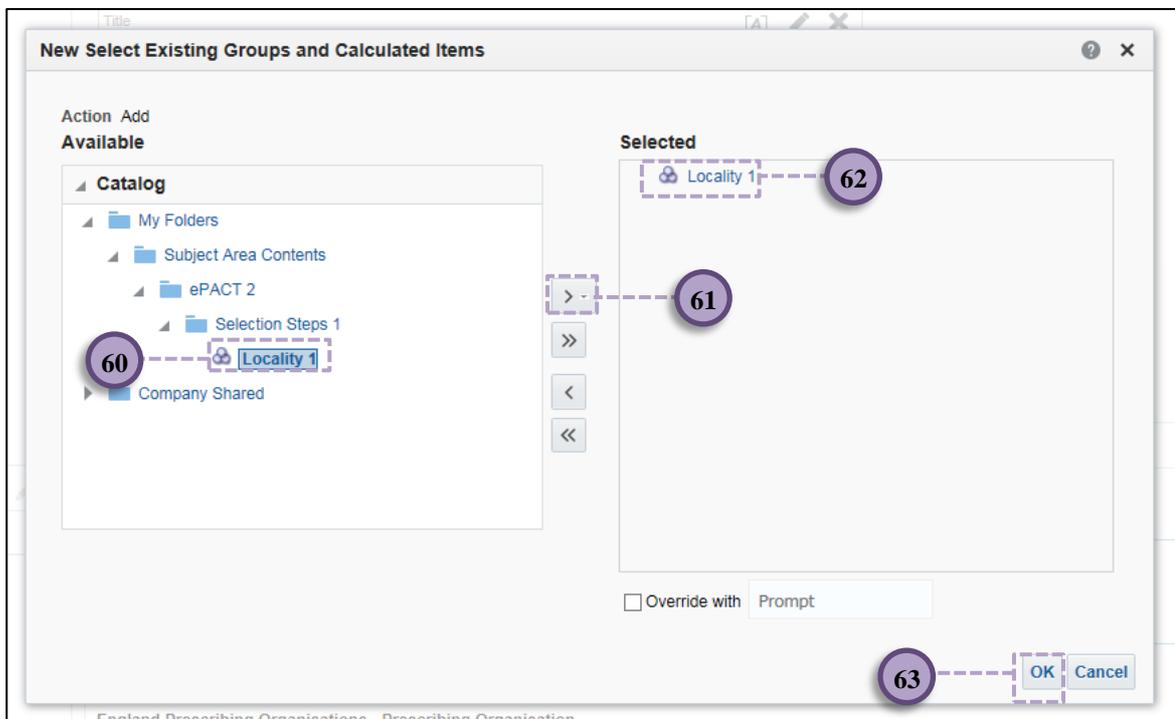
60 Select the group from the saved location

61 Use the arrow icon to select the group

62 The group selected will be displayed in the 'Selected' section

63 Click 'Ok'
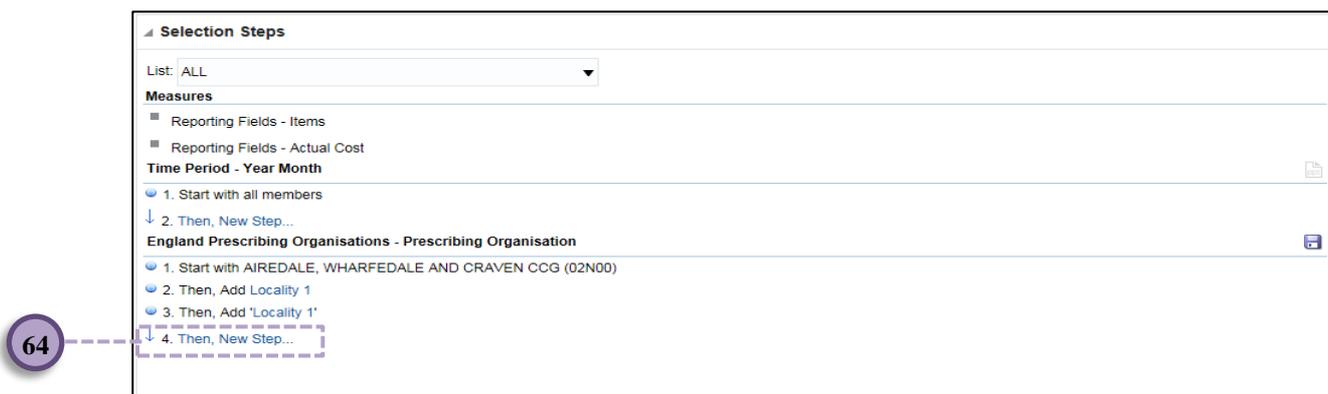
64 The new group added will now be displayed in the selection steps pane