ePACT2 guide

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

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1. Getting started

Log in to ePACT2.

This will open the homepage.

RACLE [®] Business Intelligence Cloud Service			*	ې 🖓 Trainin User3
January 18, 2018 Welcome Training User3				
Recent Favorites				
	VA Projects	Dashboards	Analyses	
	Catalog	Academy		
Create Tour				

2. Create a basic analysis

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	Welcome Training Use	r3			
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ePACT2 guide - Using Selection Steps to show data at multiple Org+BNF levels within an analysis v0.3





The 'Select Subject Area' pane will appear.

	Cloud Service					A O Us	ining 👻
	VA Projects	Dashboards	(S) Analyses	Catalog	Academy		
Analyses						Select Subject Area	×
Recent Favorites						Search	٩,
X Name		Modified				Prebuilt Comparators	
				3)	Version Control Release : RPD:20180110 (201801001844) Cun ePACT2 Save Date : 201801091844 Current LF Save Date : 201712221004 Dental Service Tes aleitae Jaef 231 ePACT2	ent IS I

(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.

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

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	the field i	into the 'Sel	lected Column	ns' p	ane.	oroqu			onon			'9
	7 Once sel	ected, the f	fields will appe	ar i	n the	'Sele	cted Co	olumr	ns' pa	ane.		

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GP Practice Type	Time Period England Prescribing Organisations			
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All Prescribing Organisations				
HS All Prescribing Organisations				
Drug / Appliance				
Reporting Fields				

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



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

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

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ePACT 2	⊿ Selected Columns	۵ ع
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Reporting Fields		
Patient		
	⊿ Filters	T X
		10 m

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

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Patient	fx Edit formula	
	Column Properties	
	Filters	▼
	X Delete	
	🔛 Save Column As	

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.

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		Conver this filter to SQL		
			OK Cancel	
	4			
		(12)		

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.

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ePACT 2 im Time Period im Organisation	A Selected Columns New Filter	© %
 Drug / Appliance Reporting Fields 	Select Values	@ ×
Patient	Available Selected 201711) »
∡ Catalog → B	15	OK Cancel

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

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.

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	✓ Filters Year Month is equal to / is in 201711	× بخ چ
	20	

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.

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Drug / Appliance	📳 Year Month 🏟 🕨 🛬 Prescribing Organisation 🏟 🚦 Items 🏟 🚦 Actual Cost 🕸	
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	l carmonaria equ			Astural Opert		
				Actual Cost		
				More Columns		
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22 Select 'More Columns' from the drop down list.

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(> Canc	a Cancel

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.

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Criteria Results Prompts Advance				
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 ePACT 2 Time Period 	✓ Selected Columns			© ×
Organisation	Time Period England Prescribin	ng Organisations Reporting Fields		
Drug / Appliance	Year Month 🏟 🔸 🖫 Prescribing	Organisation 🏟 🚦 Items 🏟 🚦	Actual Cost 🔅	
Reporting Fields				
Patient				
	⊿ Filters			₹ % »
	Year Month is equal to / is in 201	711		25
	AND Commissioner / Provider plus Coo	Je is equal to / is in AIREDALE, WHAI	RFEDALE AND CRAVEN CCG (02N00)	25
				-

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'.



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.

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.



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

27

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

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ppt

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

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Criteria Results Prompts Advance	ced	
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	At Level <any> Search Match Case</any>	
(33)	England Prescribing Organisations.Prescribing Orga AIREDALE NHS FOUNDATION TRUST (RCF00) AIREDALE, WHARFEDALE AND CRAVEN CCG (02N	» »
Ist All ▼	AIREDALE - ACDAT (RCE35) AIREDALE CENTRE FOR MENTAL HEALTH (Y05798) AIREDALE EXTENDED ACCESS (Y05823)	< «
 My Folders Company Shared 	AIREDALE FRESH START (RCEA3)	
	<	
✓ Views → ااہ ▼ اللہ اللہ		Uvernee with Prompt
Pivot Table		

- 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'

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✓ Subject Areas Q ↑↓ ▼ ≫ ✓ PACT 2 ▶ in Time Period	Compound La	No ▼ Do G Ho ▼		z (Å) e		ej) [2		
Organisation The Drug / Appliance	Pivot Table				[A]] 102 /	×		
Patie	Year Month	Prescribing Organisation			Items	Actual Cos	st		
(37)		▲ AIREDALE, WHARFEDALE	AND CRAVEN CCG	5 (02N00)	265,878	2,244,026.9	2	(38)	
	201711	ADDINGHAM SURGERY ((B83620)		6,433	41,713.5	50		
	201711	AIREDALE EXTENDED A	CCESS (Y05823)		89	463.3	38		
	201711	BINGLEY DERMATOLOG	Y CLINIC (Y00631)		90	1,569.7	76		
	201711	CROSS HILLS GROUP PF	RACTICE (B82020)		27,624	193,054.7	78		
	201711	DR LOCAL CARE DIRECT	F OOH (Y04174)		123	735.5	54		
	201/11	DYNELEY HOUSE SURGE	ERY (B82053)		19,200	146,361.7	/5		
	201711	FARFIELD GROUP PRAC	TICE (B83021)		20,530	100 701 6	30		
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List All 🔻	201711	HAWORTH MEDICAL DRA	ACTICE (B93027)		17 169	114 554 5	53		
My Folders	201711	HOLYCROFT SURGERY ((B83023)		15,798	140.841.9	92		
Company Shared	201711	▶ I G MEDICAL (B83624)	,		33,951	268,610.4	44		
		· · · ·							



(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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	201711	ADDINGHAM SURGERY (B83620)	6.433	41.713.50		
	201711	AIREDALE EXTENDED ACCESS (Y05823)	. 89	463.38		
	201711	 BINGLEY DERMATOLOGY CLINIC (Y00631) 	90	1,569.76		
	201711	CROSS HILLS GROUP PRACTICE (B82020)	27,624	193,054.78		
	201711	▶ DR LOCAL CARE DIRECT OOH (Y04174)	123	735.54		
	201711	DYNELEY HOUSE SURGERY (B82053)	19,200	146,361.75		\sim
30						
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	England Preso	cribing Organisations - Prescribing Organisation				
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⊿ views → [] ₀ ▼ // ij >>	¥ 2. Then, New	40				
Title						
B Pivot Table						

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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

▲ Selection Steps	
List: ALL	
Measures	
Reporting Fields - Items	
Reporting Fields - Actual Cost Time Period - Year Month	ppt
1. Start with all members	
↓ 2. Then, New Step	
England Prescribing Organisations - Prescribing Organisation	
1. Start with AIREDALE, WHARFEDALE AND CRAVEN CCG (02N00)	
2. Then, New Stor	
41 Add Groups or Calculated Items	

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

42) From the drop down list select 'New Group'



 $e\mathsf{PACT2}\ guide \ -\ Using\ Selection\ Steps\ to\ show\ data\ at\ multiple\ Org+\mathsf{BNF}\ levels\ within\ an\ analysis\ v0.3$

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

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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	\cap
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

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.

✓ Selection Steps	
List: ALL	
Measures	
Reporting Fields - Items	
Reporting Fields - Actual Cost	
Time Period - Year Month	ppt.
I. Start with all members	
↓ 2. Then, New Step	
England Prescribing Organisations - Prescribing Organisation	
I. Start with AIREDALE, WHARFEDALE AND CRAVEN CCG (02N00)	
© 2. Then, Add Locality 1 52	
↓ 3. Then, New Step	

52 Click the link for the group

▲ Selection Steps	
List ALL	
Measures	
Reporting Fields - Items	
Reporting Fields - Actual Cost Time Period - Year Month	
1. Start with all members	
↓ 2. Then, New Step	
England Prescribing Organisations - Prescribing Organisation	
I. Start with AIREDALE, WHARFEDALE AND CRAVEN CCG (02N00)	
2. Then, Add Locality 4 to the State Stat	
3. Then, New Ste Edit Group Save Group As s Save Group As s	

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53 Select 'Save Group As' from the drop down list

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Selec	Save As OX	
Year Mont 2 54	Folders Save In ▲ My Folders My Folders/Subject Area Contents/ePACT 2/Sei ▲ Subject Area Content Active ▲ Active Selection Steps ▲ Active Active ▲ Active Active	
Selec st: AL easure Rep Rep me Pe 1 Sta	Name Locality 1 55 Description Save special objects like Filters and Members from quick access folders view to guarantee proper catalog placement.	
. The gland	n, New Step Prescribing Organisation d with AUREPOALS AND ORDAYCH COCC (02000)	

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

Steps			
	[A]	872 💉 🗙	
Prescribing Organisation	Items	Actual Cost	
AIREDALE, WHARFEDALE AND CRAVEN CCG (02N00)	265,878	2,244,026.92	
▶ Locality 1	34,147	236,338.05	
Steps			
fields - Items			
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cribing Organisations - Prescribing Organisation			
AIREDALE, WHARFEDALE AND CRAVEN CCG (02N00)	oups and (Calcul.	59
	Prescribing Organisation AIREDALE, WHARFEDALE AND CRAVEN CCG (02N00) Locality 1 Book Bields - Items Ields - Items Ields - Actual Cost Year Month all members Step Tribing Organisations - Prescribing Organisation AIREDALE, WHARFEDALE AND CRAVEN CCG (02N00) Locality 1 Select Members Step Add Groups or Calculated Items Add Groups Organisation Add Groups or Calculated Items Add Groups or Calculated Items Add Groups Organisation Add G	Prescribing Organisation Items AIREDALE, WHARFEDALE AND CRAVEN CCG (02N00) 265,878 34,147 34,147 Book Steps Ields - Items Image: Control of Con	Prescribing Organisation Items Actual Cost AIREDALE, WHARFEDALE AND CRAVEN CCG (02N00) 265,878 2,244,026.92 b Locality 1 34,147 236,338.05 Book 34,147 236,338.05 Steps Image: Content of the step o

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'

New Select Existing Groups and Calculated Items		
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Available	Selected	_
⊿ Catalog	Locality 1 62	
My Folders		
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Selection Steps 1	»	
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	(63) OK C	ancel
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 61 Use the arrow icon to select the 62 The group selected will be displated 63 Click 'Ok' 	group ayed in the 'Selected' section	
 61 Use the arrow icon to select the 62 The group selected will be displated 63 Click 'Ok' election Steps 	group ayed in the 'Selected' section	
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61 Use the arrow icon to select the 62 The group selected will be displa 63 Click 'Ok' election Steps Reporting Fields - Items	group ayed in the 'Selected' section	
 61 Use the arrow icon to select the 62 The group selected will be displated of the group selected wi	group ayed in the 'Selected' section	
61 Use the arrow icon to select the 62 The group selected will be displated with the displated of the selection selection steps 63 Click 'Ok' election Steps Reporting Fields - Items Reporting Fields - Items Reporting Fields - Items Stat with all members	ayed in the 'Selected' section	
Use the arrow icon to select the The group selected will be displated The group selected will be displated Click 'Ok' election Steps ALL sures Reporting Fields - Items Reporting Fields - Actual Cost te Period - Year Month Start with all members . Then, New Step	group ayed in the 'Selected' section	
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61 Use the arrow icon to select the 62 The group selected will be disple 63 Click 'Ok' Glick 'Ok' election Steps ALL ALL seventing Fields - Items Reporting Fields - Items Reporting Fields - Actual Cost e Period - Year Month Start with all members Then, New Step gland Prescribing Organisations - Prescribing Organisation Start with AlREDALE, WHARFEDALE AND CRAVEN CCG (02N00)	group ayed in the 'Selected' section	
61 Use the arrow icon to select the 62 The group selected will be disple 63 Click 'Ok' 63 Click 'Ok' Image: Selected will be disple Image: Selec	ayed in the 'Selected' section	
 Use the arrow icon to select the The group selected will be displed in the displed of the group selected will be displed in the displed of the group selected will be displed in the displed of the group selected will be displed iteration in the group selected will be displed iteration in the group selected will be displed iteration iteration iteration iteration is selection steps Inter, Add Locality 1 Inter, New Step 	ayed in the 'Selected' section	
Use the arrow icon to select the Use the arrow icon to select the The group selected will be disple Of Click 'Ok' election Steps ALL sures Reporting Fields - Items Reporting Fields - Actual Cost e Period - Year Month Start with all members Then, New Step Iand Prescribing Organisations - Prescribing Organisation Start with AIREDALE, WHARFEDALE AND CRAVEN CCG (02N00) Then, Add 'Locality 1' Then, New Step	ayed in the 'Selected' section	

64 The new group added will now be displayed in the selection steps pane

64