

ePACT2 guide

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

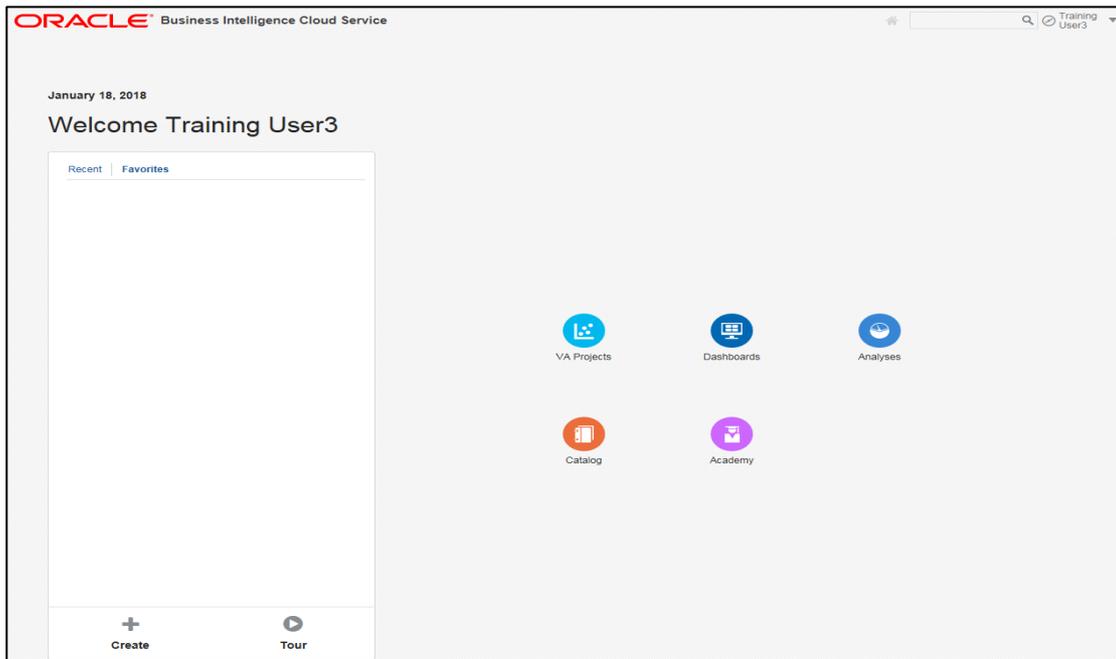
Contents

1.	Getting started	page 2
2.	Create a basic analysis	Page 2
3.	Filtering – to limit the results to a specific ‘Time Period’	page 6
4.	Filtering – to limit the results of the analysis to an overall organisation level.	page 8
5.	Run the analysis	page 10
6.	Using Selection Steps to limit the data displayed	page 11
7.	Including total for groups of organisations/BNF	page 13
8.	Saving Groups for use in future analysis	page 16
9.	Re-using Saved Groups	page 17

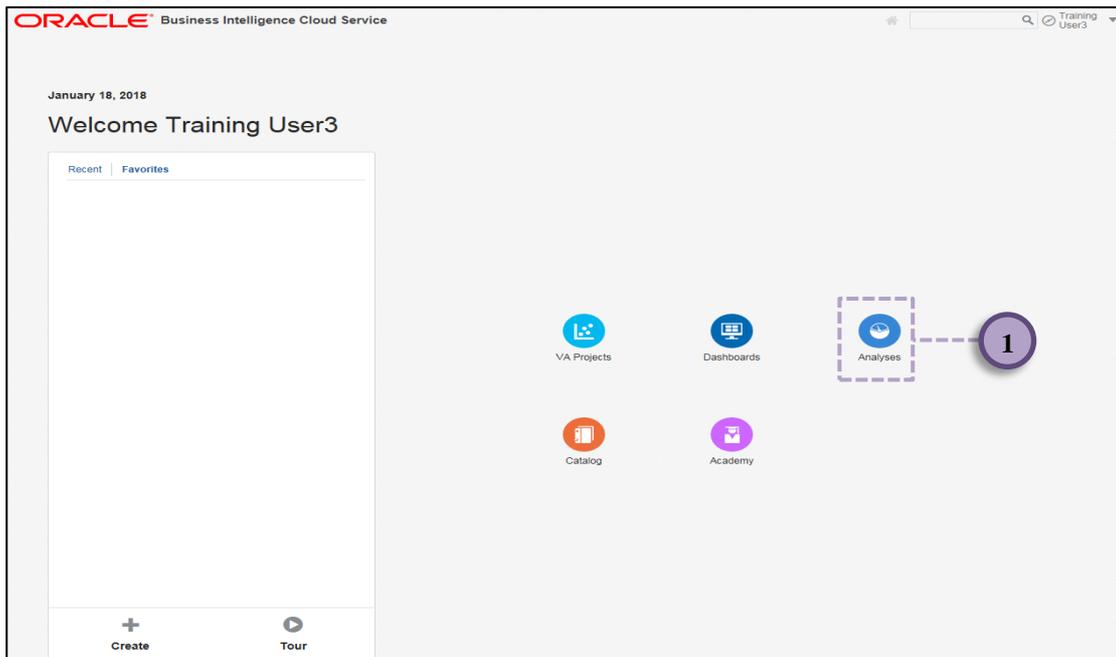
1. Getting started

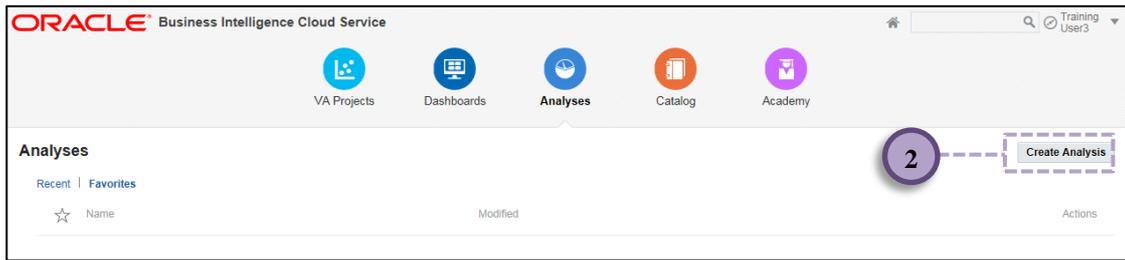
Log in to ePACT2.

This will open the homepage.



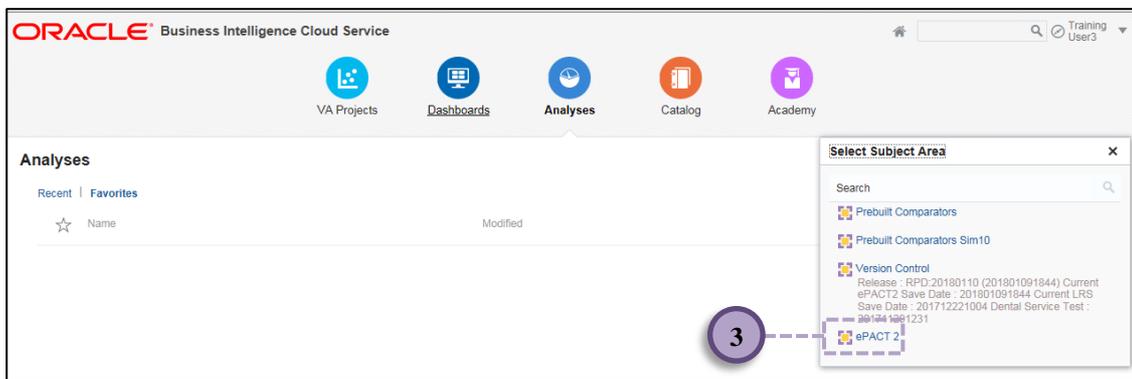
2. Create a basic analysis





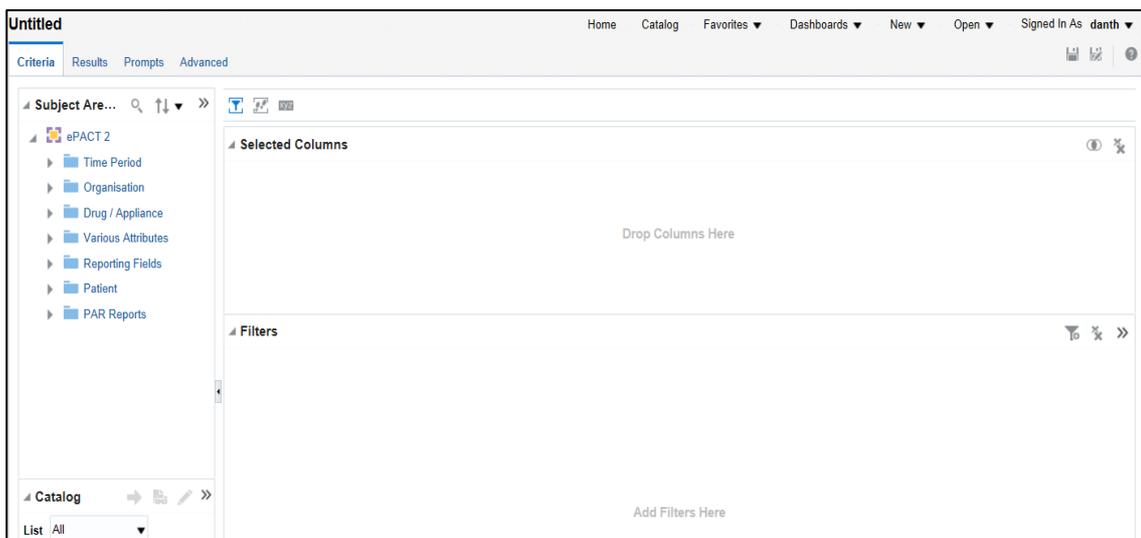
- 1 Select 'New.'
- 2 Select 'Analysis' from the drop down list.

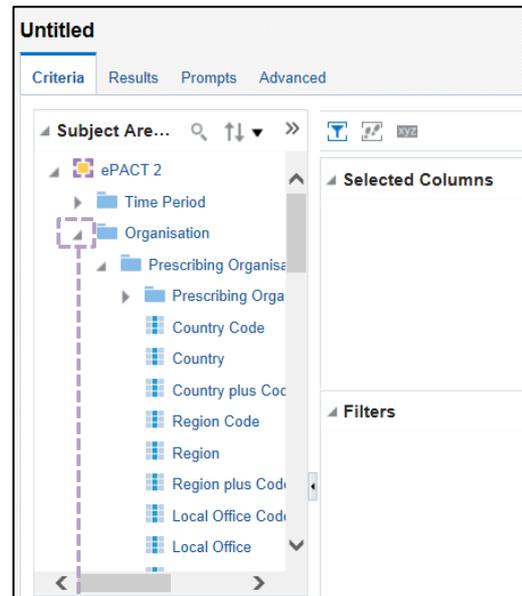
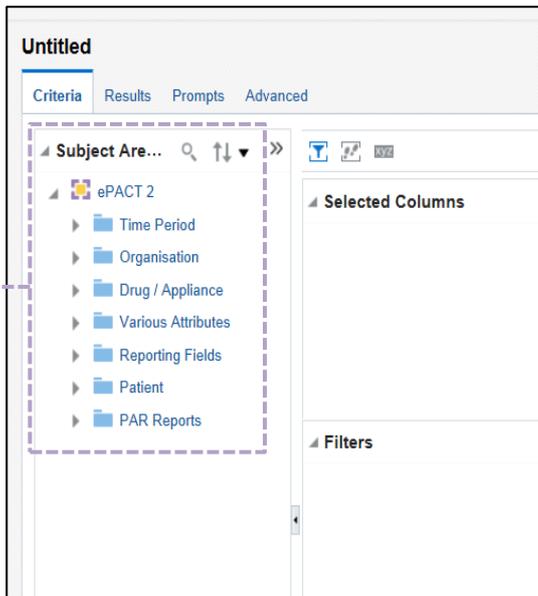
The 'Select Subject Area' pane will appear.



- 3 Select your required Subject Area.

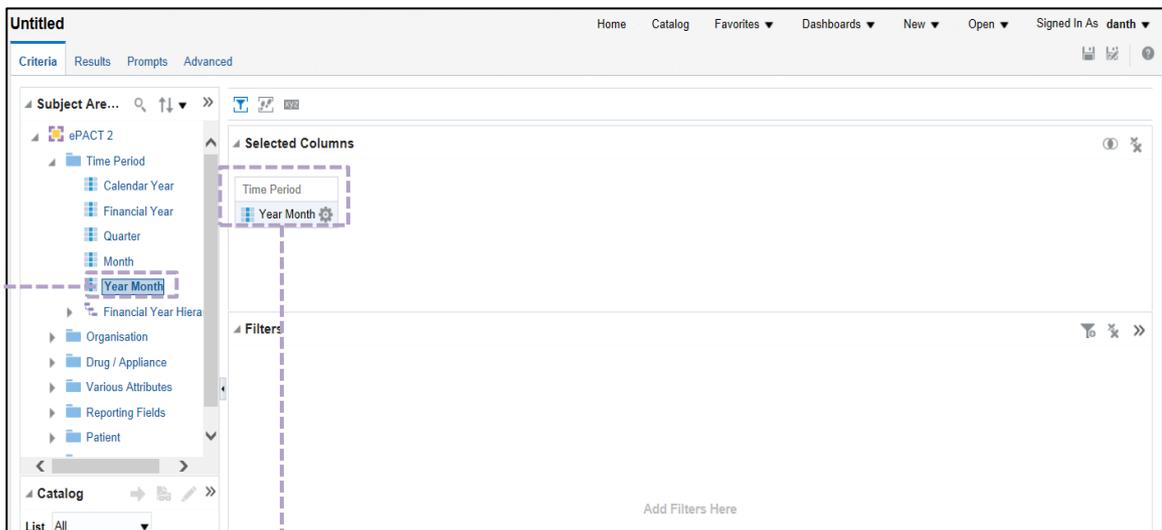
The 'Analysis Builder' will open.





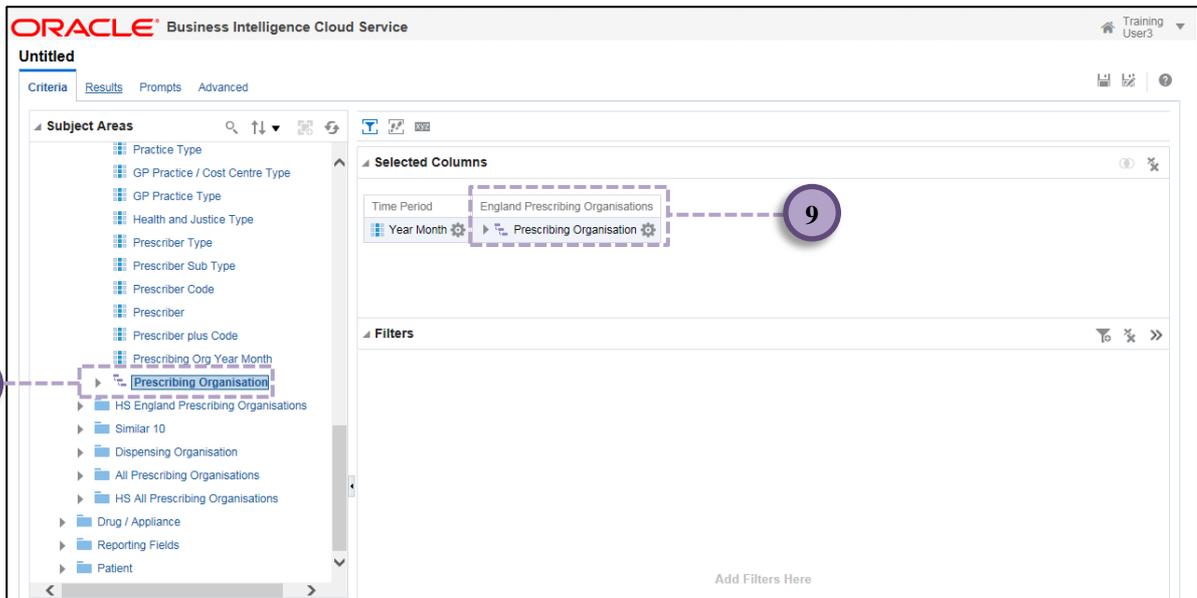
4 The available Dimensions / Facts are listed in the 'Subject Areas' pane.

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



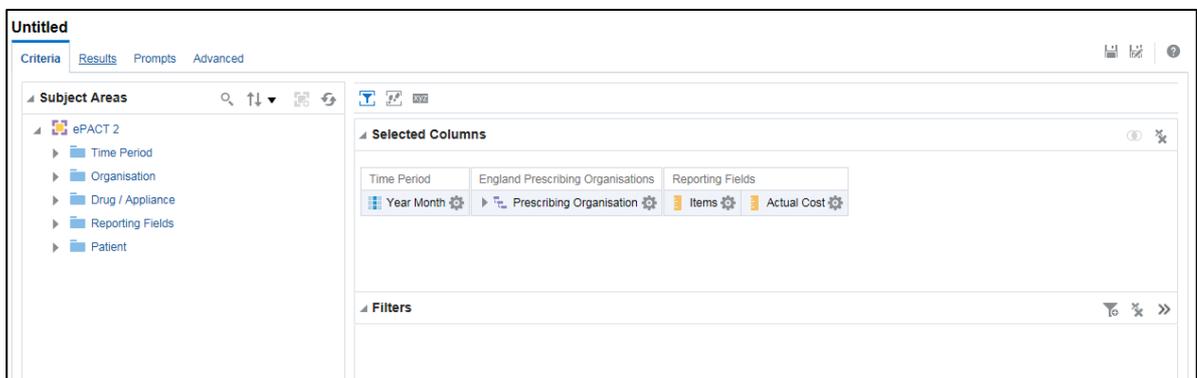
6 To select a field, either 'double click' on the required field or 'click and drag' the field into the 'Selected Columns' pane.

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



- 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.

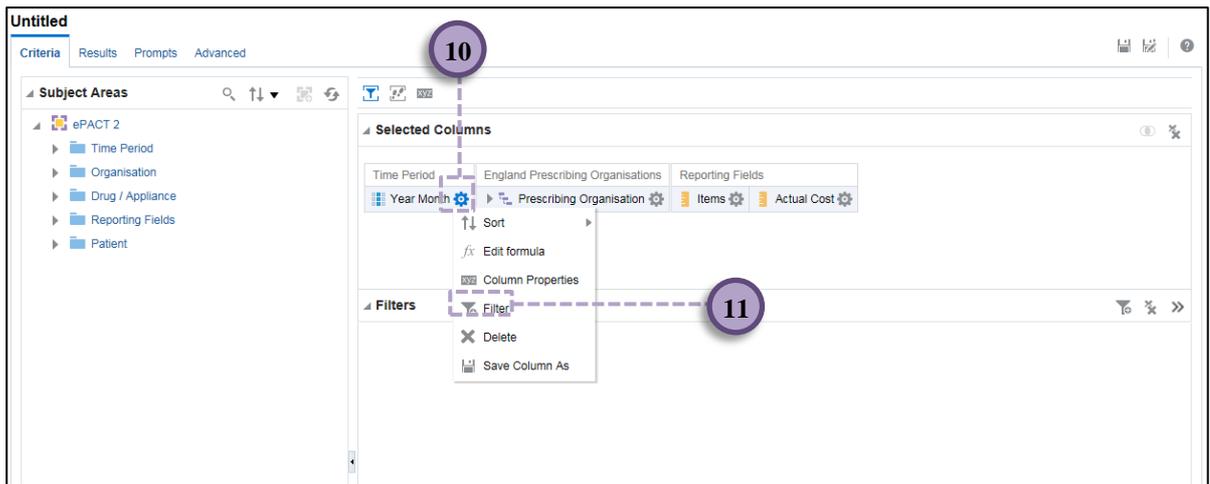
Make sure that you select fields for 'Time Period' and 'Reporting Fields'.



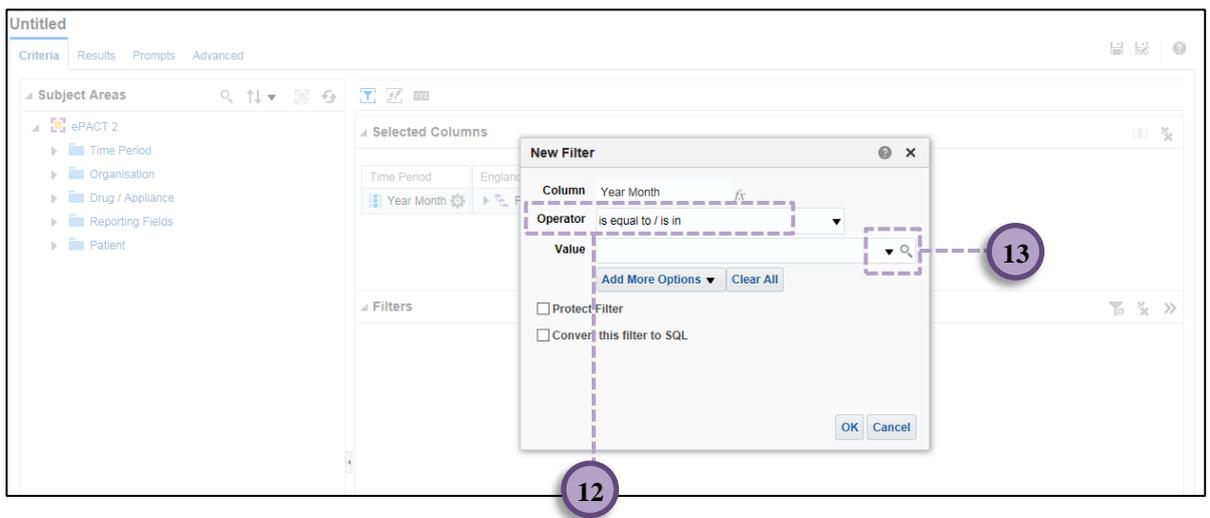
When initially generated this report will show the 'Items' and 'Actual Cost' for all organisations nationally for all 'Months' available in ePACT2.

3. Filtering – to limit the results to a specific 'Time Period'

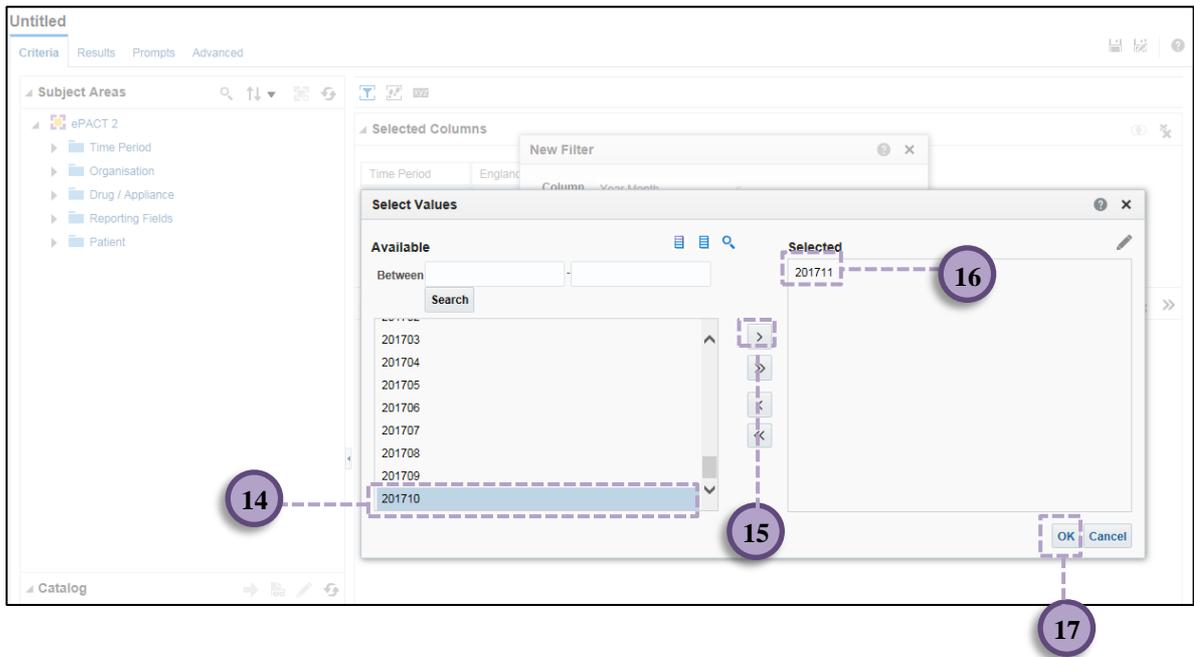
Add filter – to limit the results to a specific time period



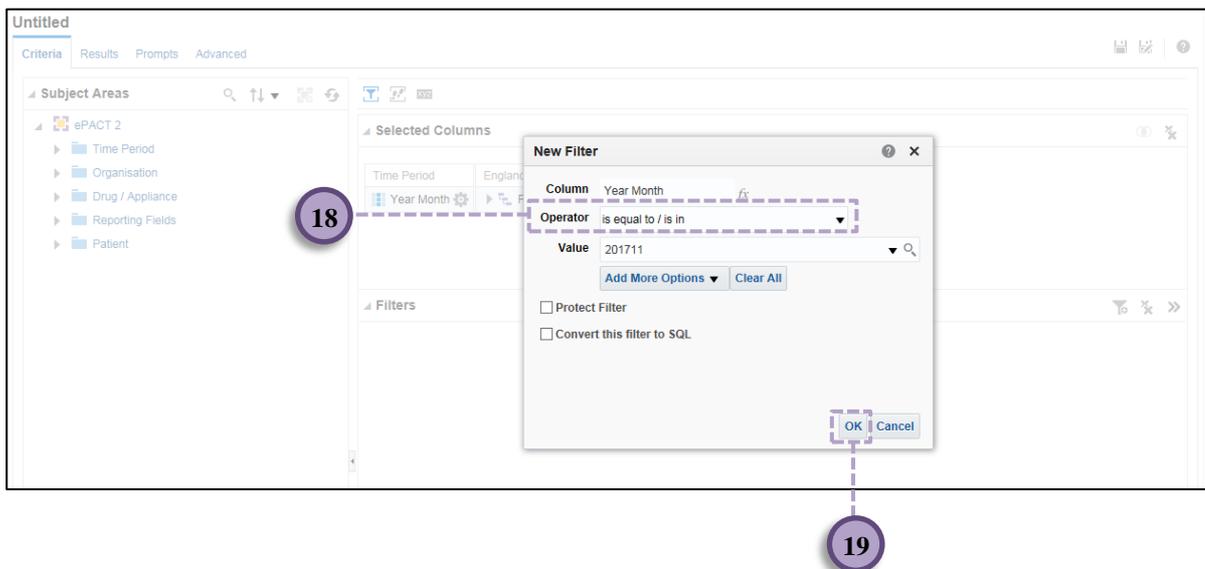
- 10 In the 'Selected Columns' pane, in the 'Time Period' column click on the cog icon next to 'Year Month'.
- 11 Select 'Filter' from the drop down list.



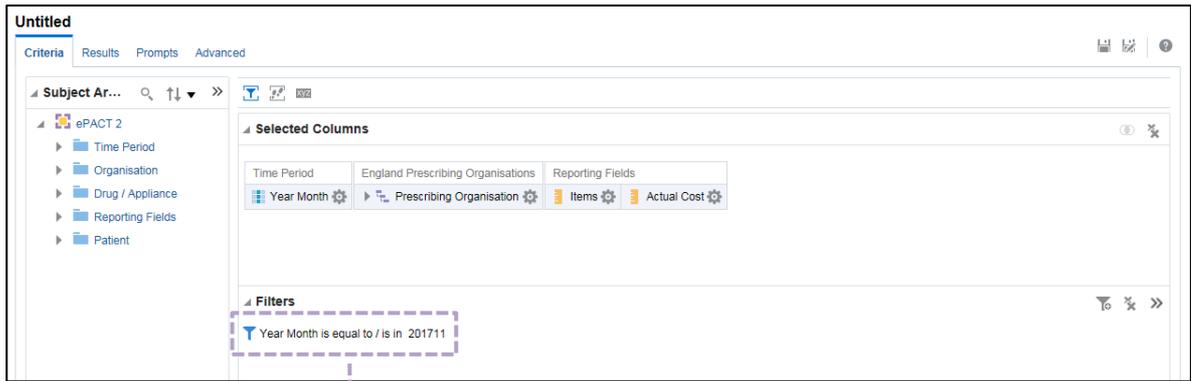
- 12 The 'Operator' field will default to 'is equal to / is in'. This value can be changed.
- 13 Click the search icon to view the 'Values' you can use for filtering.



- 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.



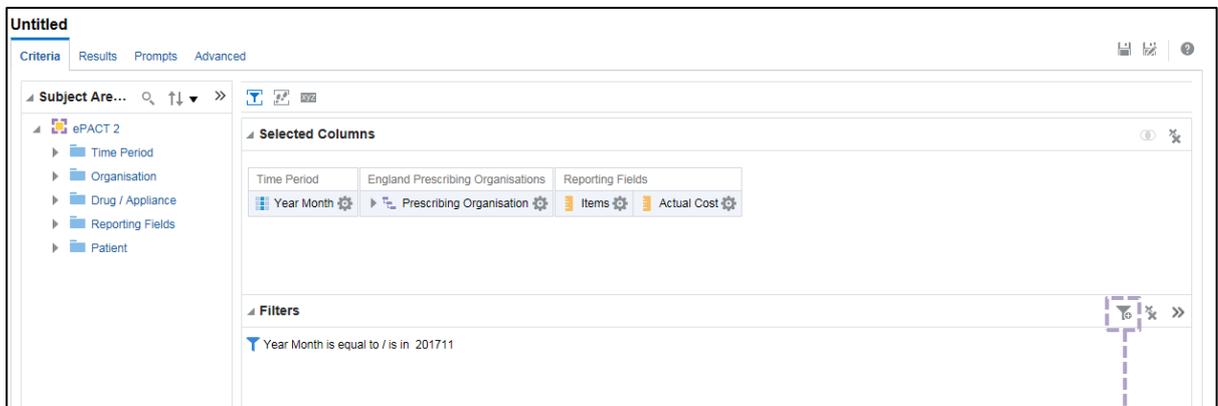
- 18 The 'Value' will display the selected month.
- 19 Select 'OK' to confirm the selection



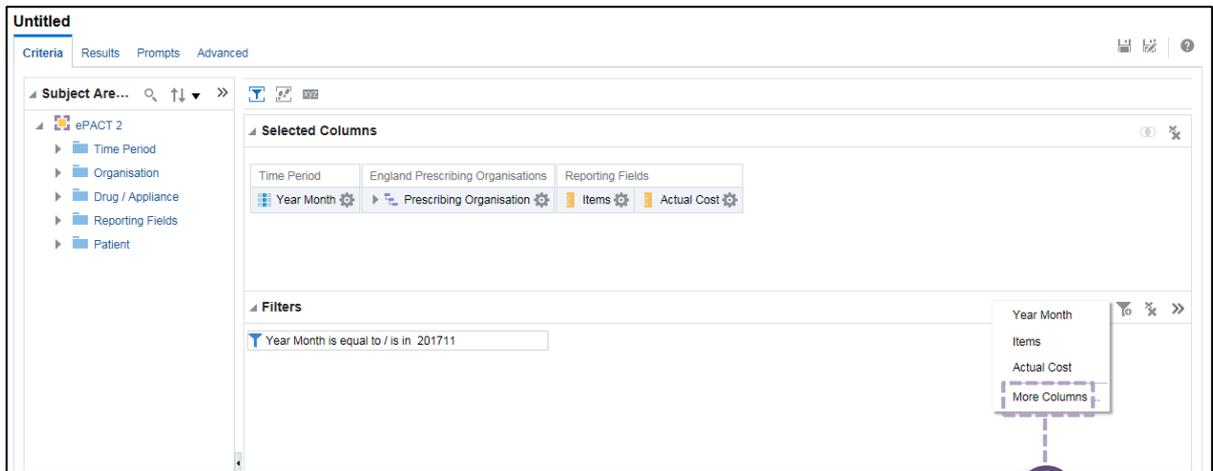
20 The filter will now appear in the 'Filter' pane.

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

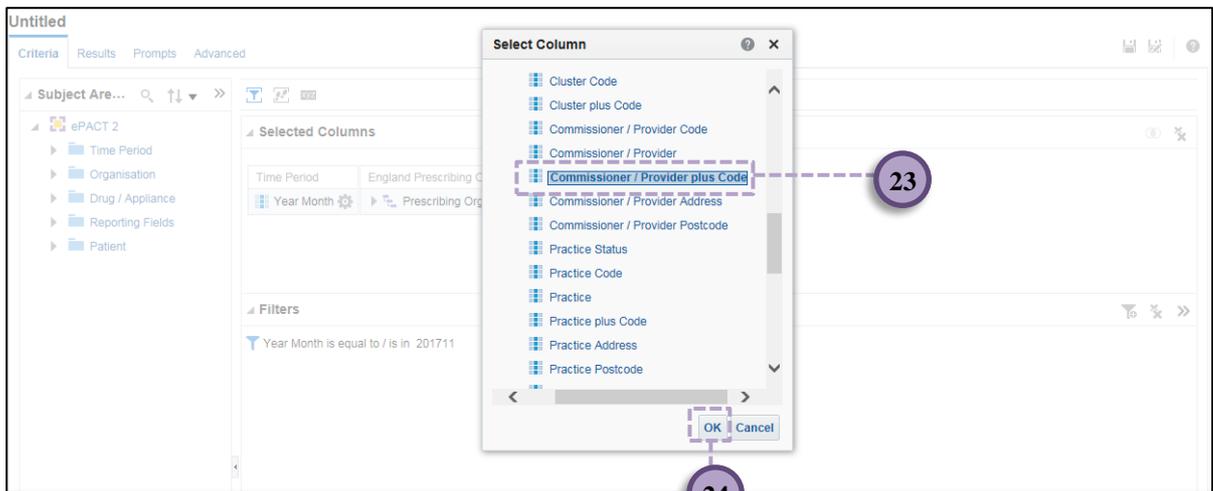
The analysis will return information for all organisations nationally however if all organisation fall under a specific organisation the analysis can be filtered to limit data to this organisation.



21 Click the 'Filter' icon within the 'Filters' pane.



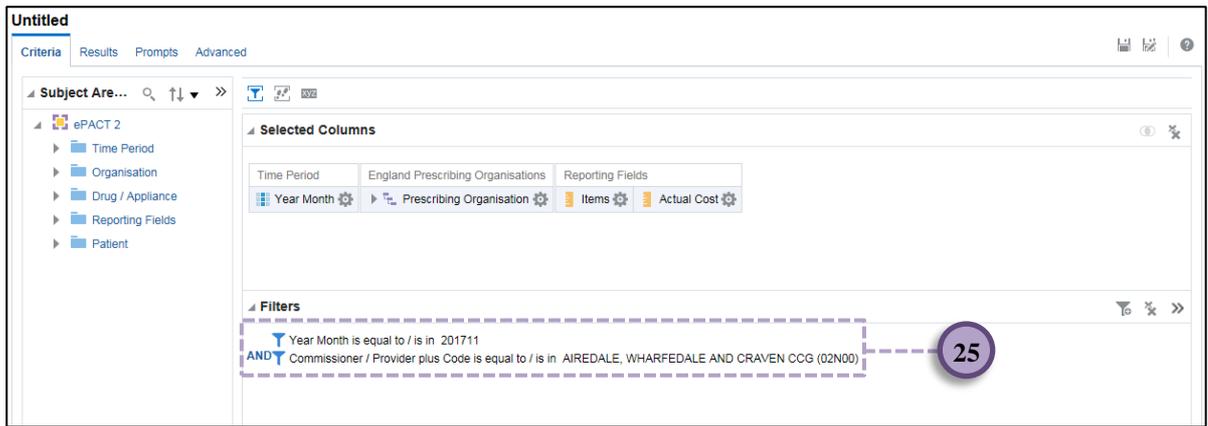
22 Select 'More Columns' from the drop down list.



23 In the 'Select Column' pane select the column you need.

24 Click 'OK' to confirm the selection.

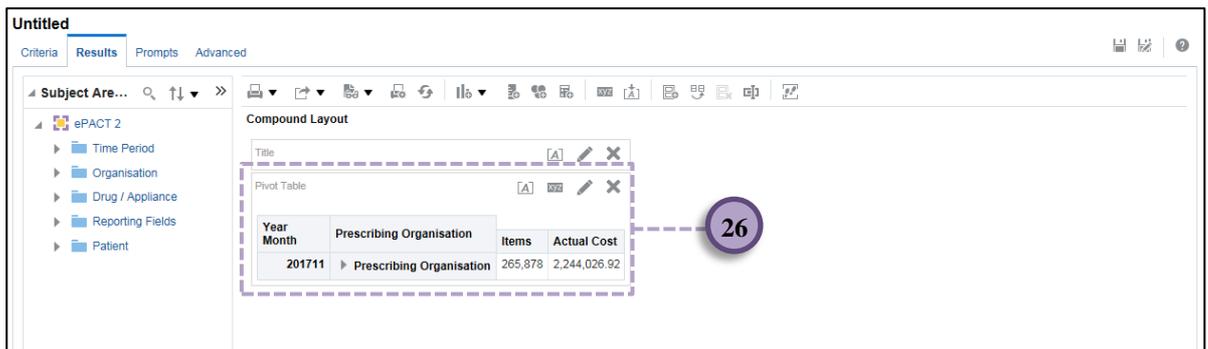
The 'New Filter' pane will be displayed, repeat the process in section 3 to add a new filter for a particular organisation.



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.

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.

The screenshot shows the ePACT2 software interface. The 'Selection Steps' pane is expanded, showing a list of measures and selection steps. A dashed box highlights the 'England Prescribing Organisations - Prescribing Organisation' selection step, and a callout circle labeled '28' points to it. Another callout circle labeled '27' points to the arrow icon used to expand the 'Selection Steps' pane.

Year Month	Prescribing Organisation	Items	Actual Cost
201711	Prescribing Organisation	265,878	2,244,026.92

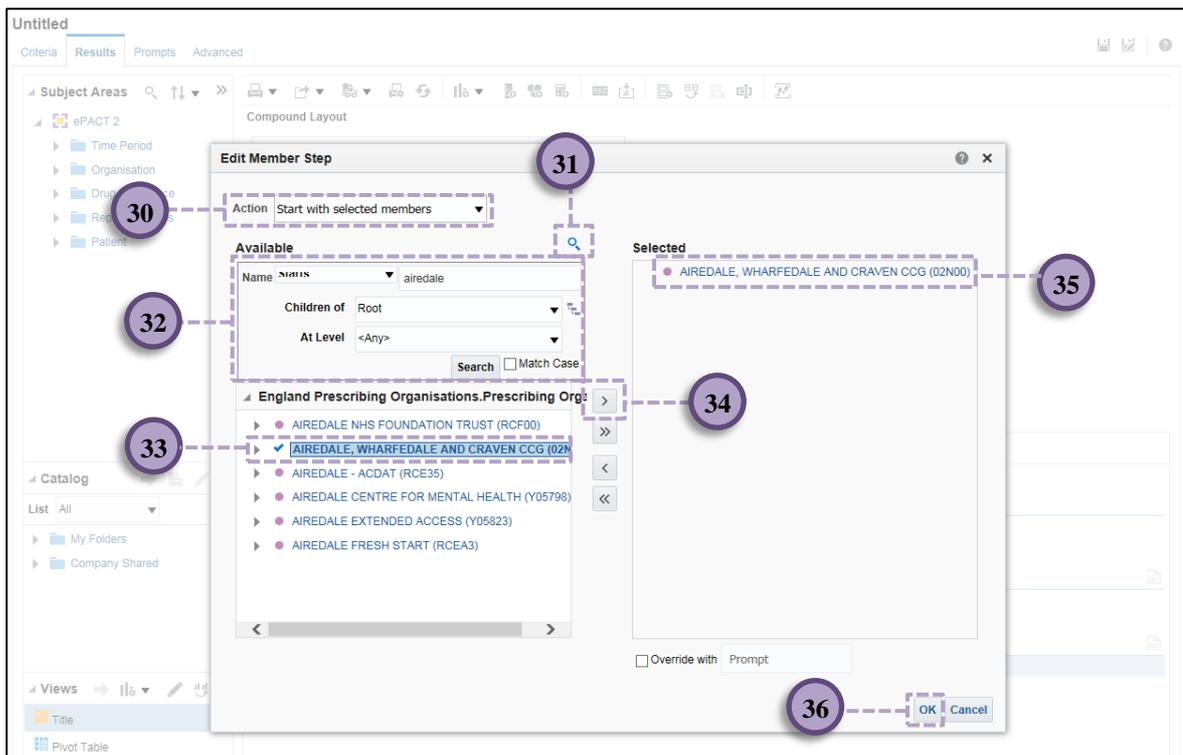
27 Click the arrow to expand the 'Selection Steps' pane.

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

The close-up screenshot shows the 'Selection Steps' pane. A dashed box highlights the 'England Prescribing Organisations - Prescribing Organisation' selection step, and a callout circle labeled '29' points to the 'Start with all members' option.

29

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



- 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'

Compound Layout

Year Month	Prescribing Organisation	Items	Actual Cost
201711	AIREDALE, WHARFEDALE AND CRAVEN CCG (02N00)	265,878	2,244,026.92
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
201711	FARFIELD GROUP PRACTICE (B83021)	20,536	207,426.35
201711	FISHER MEDICAL CENTRE (B82028)	20,935	188,701.66
201711	GRANGE PARK SURGERY (B83019)	7,394	74,608.12
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

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.

Selection Steps

List: ALL

Measures

- Reporting Fields - Items
- Reporting Fields - Actual Cost

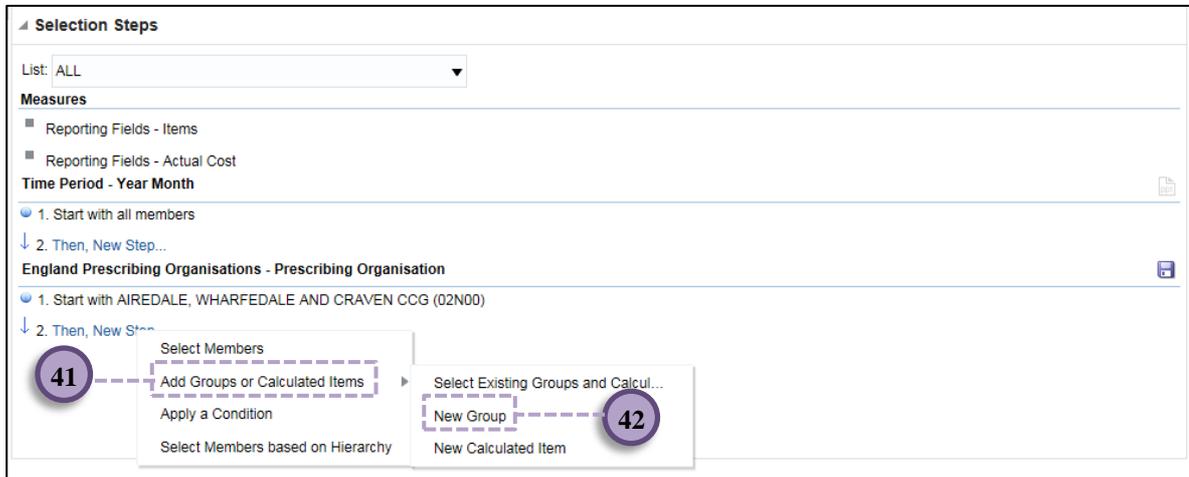
Time Period - Year Month

1. Start with all members
2. Then, New Step...

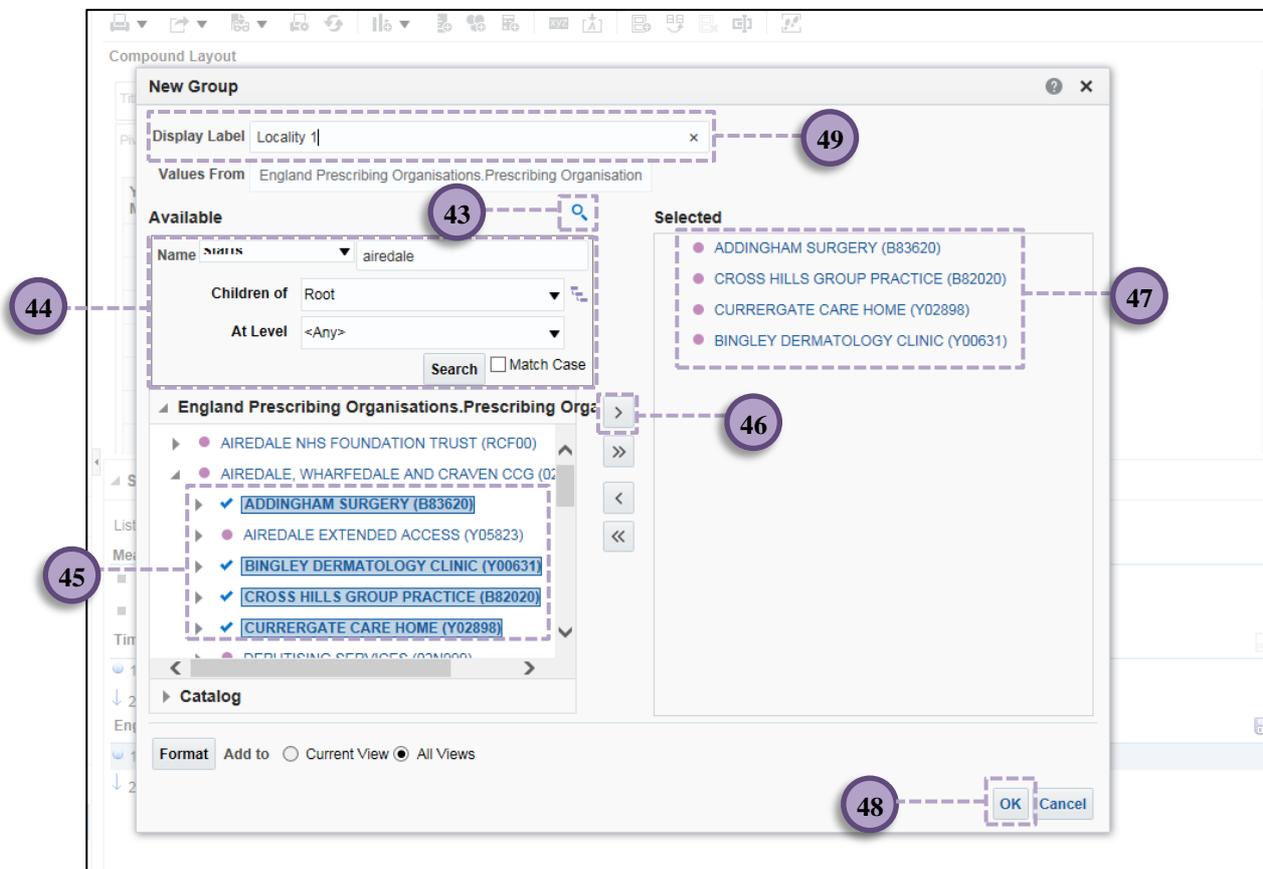
England Prescribing Organisations - Prescribing Organisation

1. Start with AIREDALE, WHARFEDALE AND CRAVEN CCG (02N00)
2. Then, New Step...

- 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 an appropriate name in the 'Display Label' section
- 49 Click 'Ok'



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

Compound Layout

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 & WHARFEDAILE 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	▶ WHARFEDAILE 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

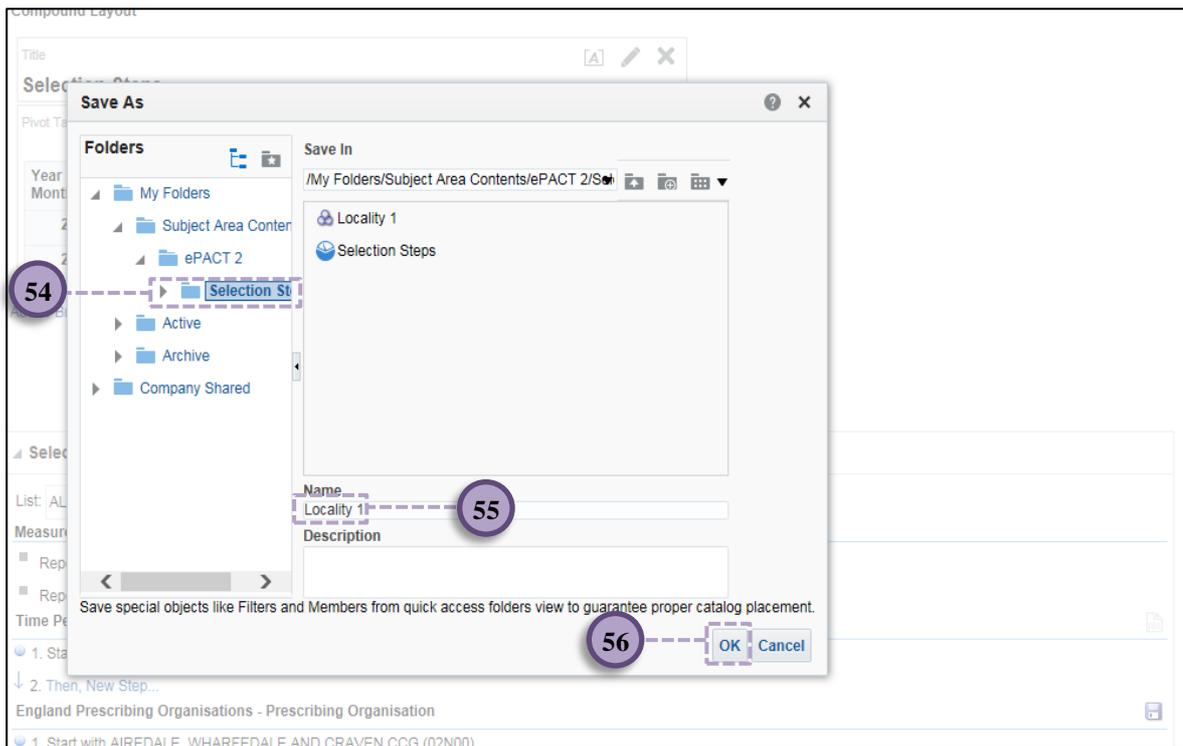
Once created groups can be saved and then reused in future analyses.

The screenshot shows the 'Selection Steps' section of a software interface. At the top, there is a 'List:' dropdown menu set to 'ALL'. Below this is a 'Measures' section with two expandable items: 'Reporting Fields - Items' and 'Reporting Fields - Actual Cost'. Underneath is a 'Time Period - Year Month' section with a list of steps: '1. Start with all members', '2. Then, New Step...', and '3. Then, New Step...'. The second step is expanded to show 'England Prescribing Organisations - Prescribing Organisation' with its own list of steps: '1. Start with AIREDALE, WHARFEDALE AND CRAVEN CCG (02N00)', '2. Then, Add Locality 1', and '3. Then, New Step...'. A callout box with the number '52' points to the 'Add Locality 1' step.

52 Click the link for the group

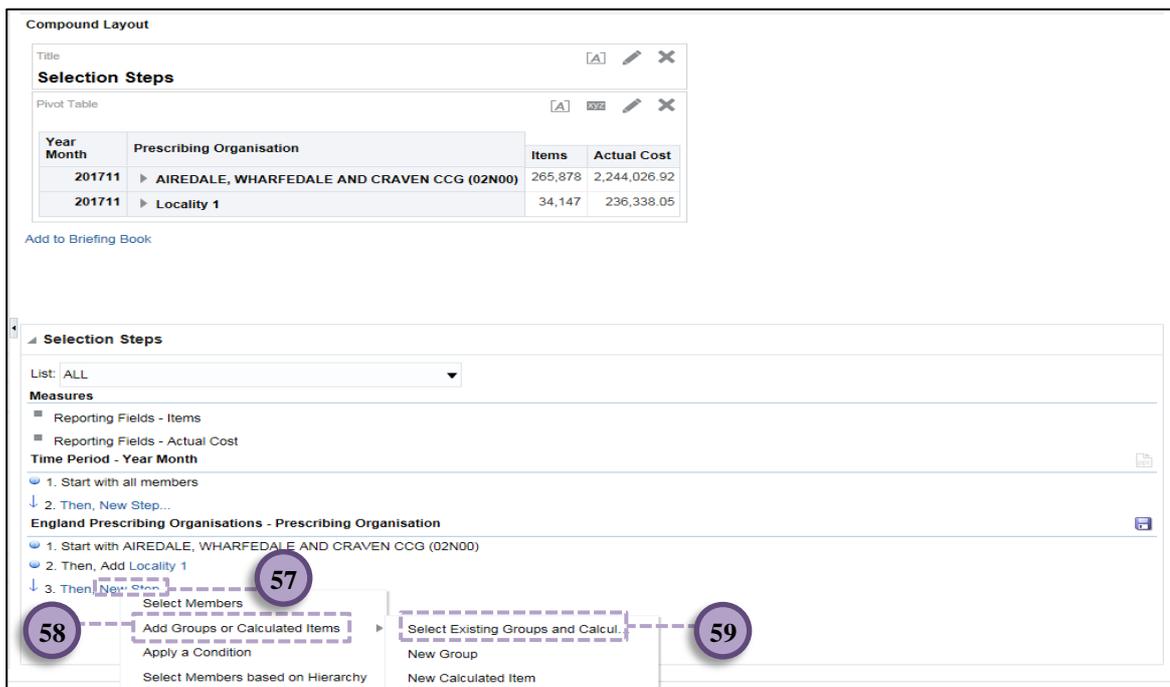
This screenshot is similar to the previous one, showing the 'Selection Steps' section. The second step, 'England Prescribing Organisations - Prescribing Organisation', is expanded. A dropdown menu is open over the '2. Then, Add Locality 1' step, showing two options: 'Edit Group' and 'Save Group As'. A callout box with the number '53' points to the 'Save Group As' option.

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

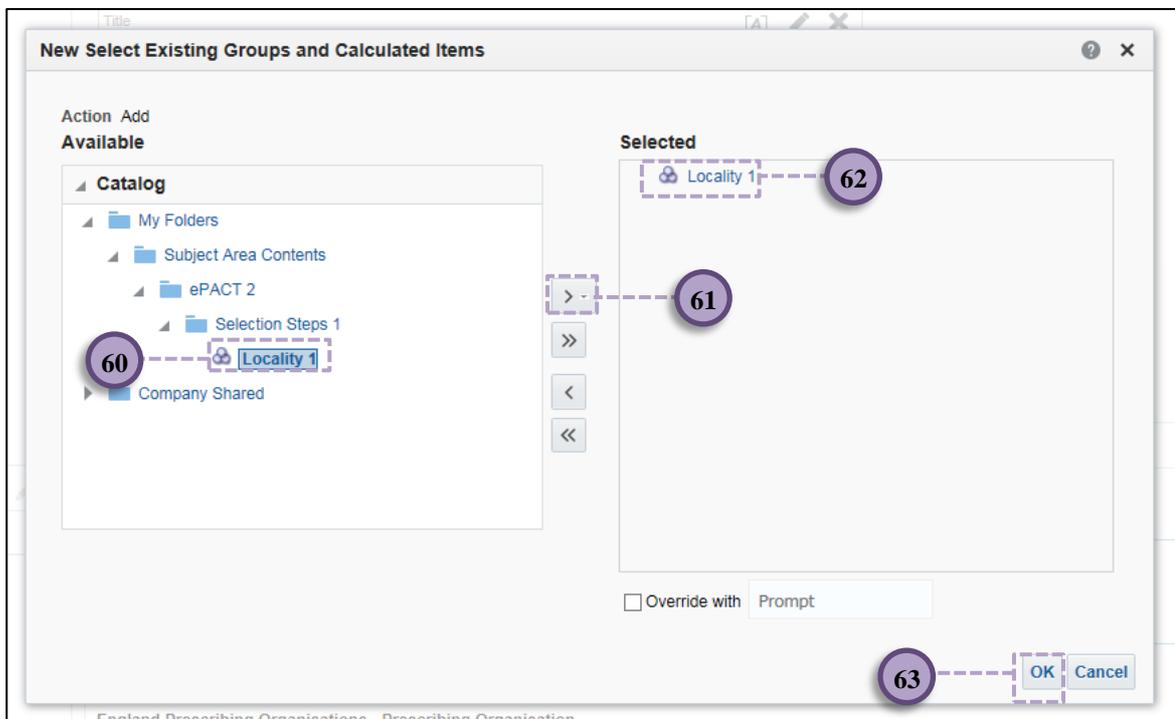


- 54 Select an appropriate folder to save the group in
- 55 Enter an appropriate name for the group
- 56 Click 'Ok'

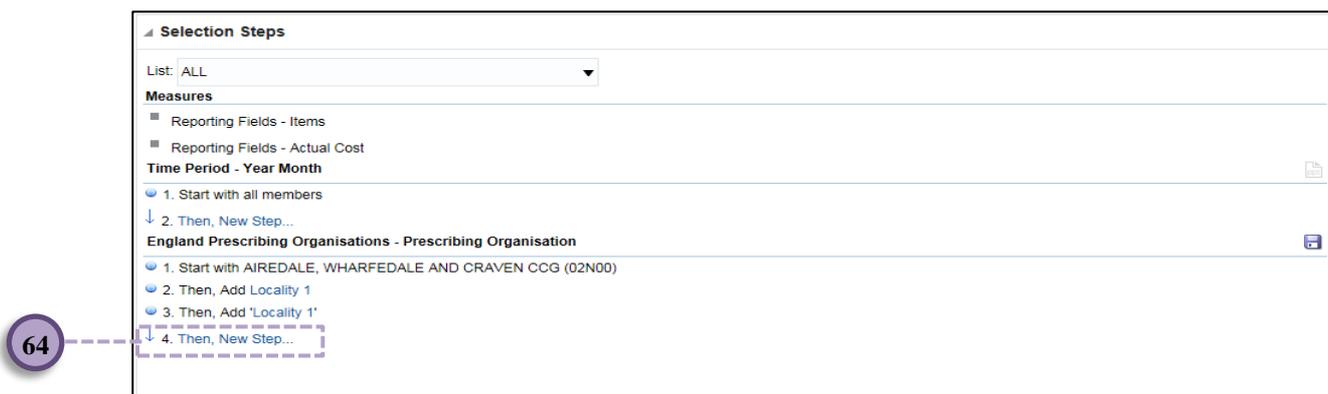
9. Re-using Saved Groups



- 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