

ePACT2 User Guide

CD Accountable Officers

Quick Start Guide

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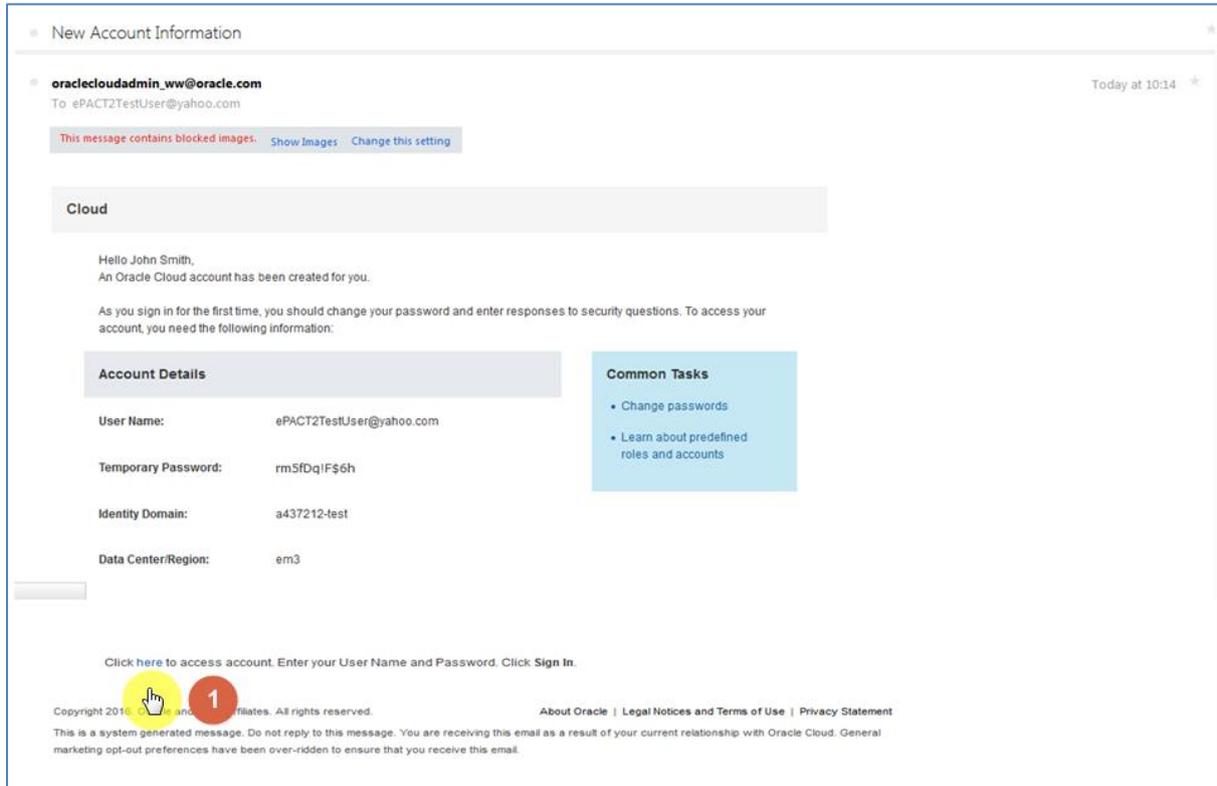
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Logging into ePACT2

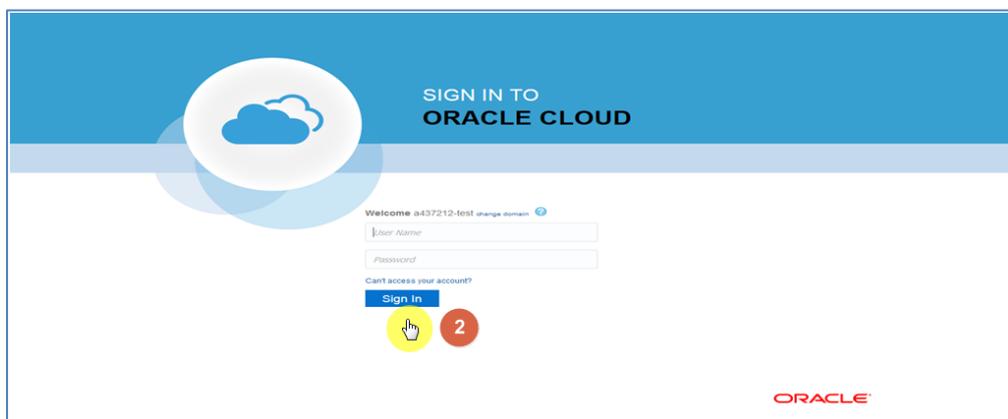
Activating your account

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.



1. Enter the user ID (email address) and temporary password provided in the email.



2. 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.

The screenshot shows the Oracle Identity Self Service Password Management page. It features a header with the Oracle logo and 'Identity Self Service'. The main content area is titled 'Password Management' and includes a 'Submit' button in the top right corner. The page contains several input fields and a dropdown menu, each with a red circle containing a number and a yellow hand icon indicating a required field. The fields are: 'Old Password' (1), 'New Password' (2), 'Re-Type New Password' (3), 'Question1' (4), 'Question2' (5), and 'Question3' (6). The questions are: 'What is your mother's maiden name?', 'What is the name of your pet?', and 'What is your favorite color?'. The answers are entered in corresponding fields.

3. Enter the temporary password provided and select a new password.
4. Select 3 security questions and provide answers to these questions; these questions will be used to reset any forgotten passwords.
5. Security questions must be selected from the drop down list available.
6. 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.



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.

Signing in

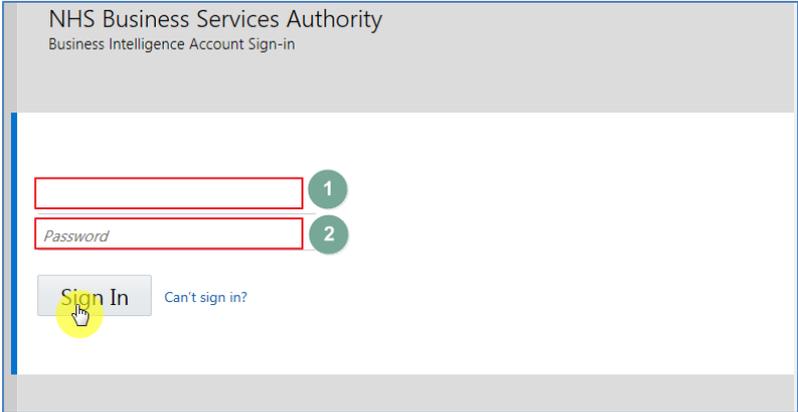
Once account set up is complete, to sign into the system, navigate to the NHSBSA ePACT2 webpage to access the system:

<https://www.nhsbsa.nhs.uk/epact2>

Select 'Access ePACT2'



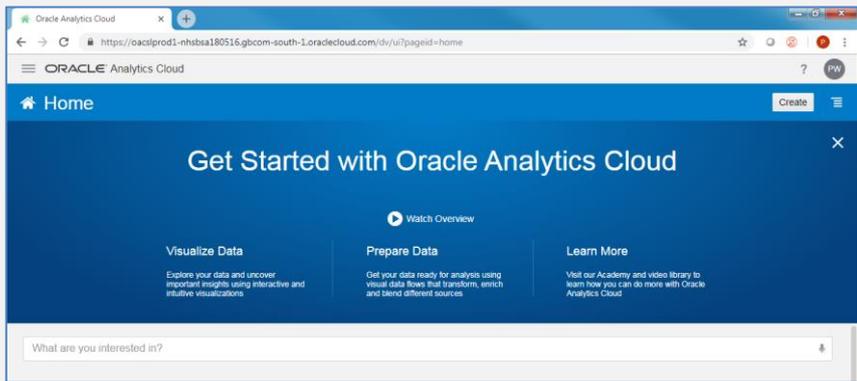
You will then be taken to the sign in page



1) Email address	Enter the email address your account is registered under
2) Password	Enter the password for your ePACT2 account

Select 'Sign in to access the account.

Please be aware when you sign out of ePACT2 and then sign back into the system without closing your browser, it will take you to the oracle sign in page:



To ensure you always sign into the correct system:

1. Close and then reopen your browser
2. Then use your bookmarked link or navigate to sign in from the ePACT2 webpage:

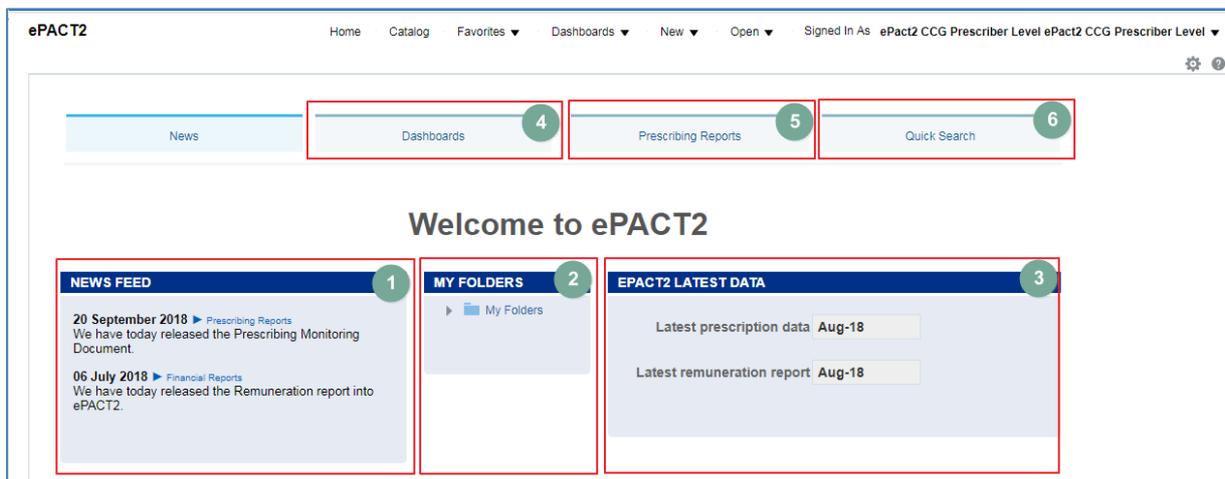
<https://www.nhsbsa.nhs.uk/epact2>

Select 'Access ePACT2'



Understanding the Landing page

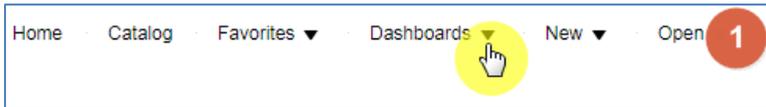
When you sign into ePACT2 you will be taken to the Landing page, the landing page enables you to quickly select the part of the system you would like to view:



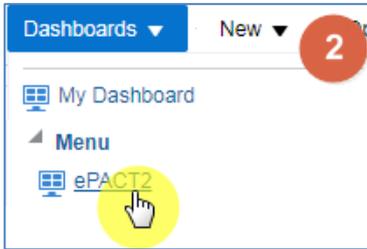
1) News feed	The News feed will display the latest news for ePACT2, it will keep you up to date when new reports are released.
2) My Folders	You can navigate to your saved content from the 'My Folders' section.
3) ePACT2 Latest Data	This section informs you the latest month's data that is in the system, and the latest month's remuneration report.
4) Dashboards	You can select this tab to view all available dashboards.
5) Prescribing Reports	You can select this tab to view all available prescribing reports.
6) Quick Search	You can select this tab to run a 'Quick Search' analysis.

If you wish to navigate back to the landing page after you have viewed other ePACT2 content complete the following steps:

1. From the 'ePACT2' toolbar select 'Dashboards'

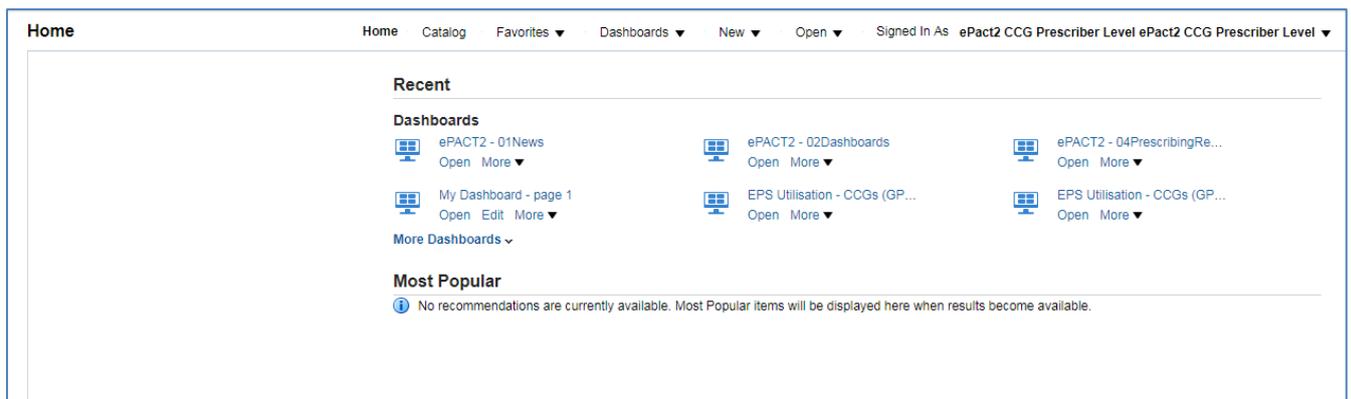


2. From the available list select 'ePACT2'



Understanding the Home Page

If you select the 'Home' icon from the 'ePACT2' toolbar you will be taken to the system homepage:



The system home page will display the most recently accessed dashboards.

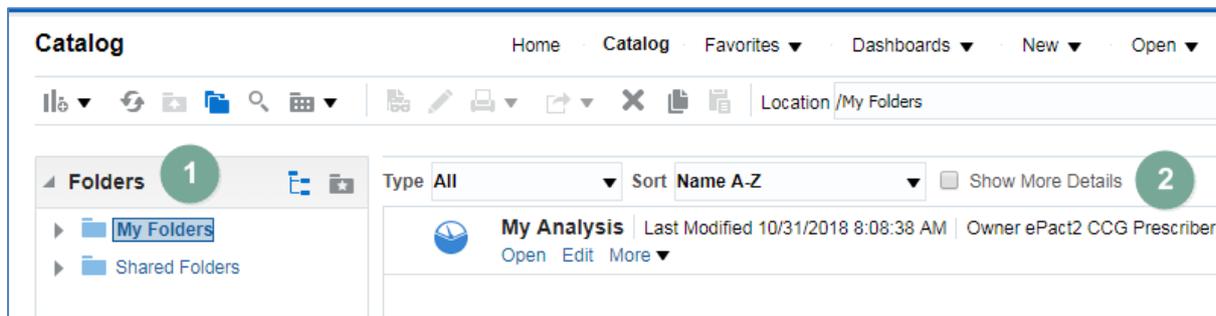
Using the Catalog

The Catalog contains content that you or the NHSBSA have defined and saved for future use.

To navigate to the 'Catalog' select the 'Catalog' icon from the toolbar:



You will then navigate to the ePACT2 Catalogue



1. Folders	Displays the available folders to open content from
2. Folder contents	When you click on a folder to highlight, the middle pane will show the content of that folder

There are two folders within the 'Catalog'

My Folders

The My Folder will contain all saved content for your account, this will include analysis, saved filters, saved groups and saved columns. The 'My Folder' works in the same way as the file structures on your PC you can create, delete and amend sub folders.

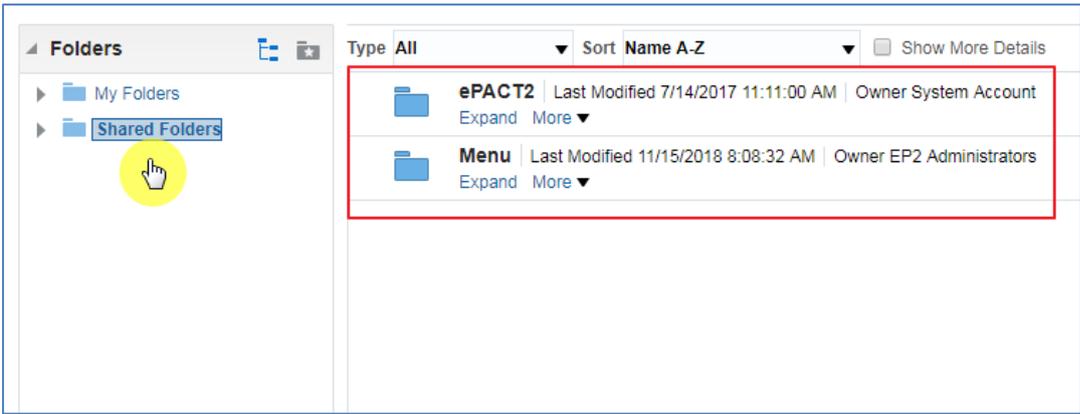
Shared Folders

The Shared Folders contains content created by the NHSBSA such as pre-set filters and prompts these can be found in the following folder:

- ePACT2
- Menu (allow user to access the Landing page)

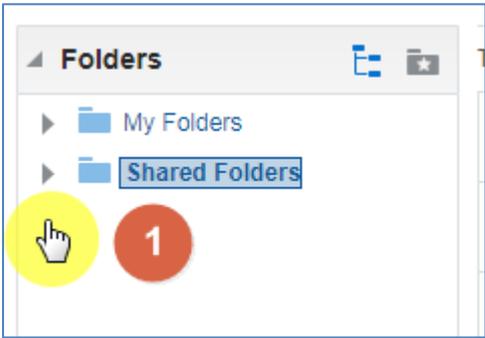
View folder content

To view the content of a folder, click on the folder to highlight, in the middle pane you will then see the content of that folder, such as analysis, filters and sub folders.

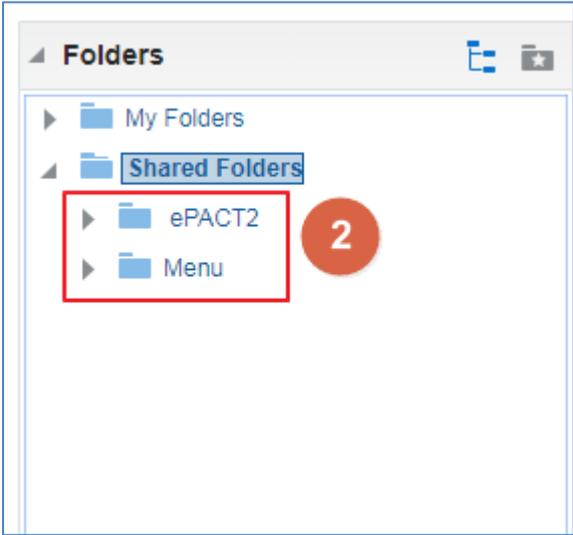


You can expand folders to view the content in two ways:

1. Select the drop down arrow next to the folder title



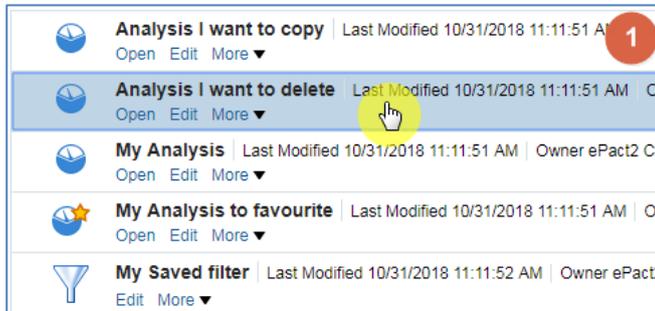
2. This will then display the sub folders available within that folder



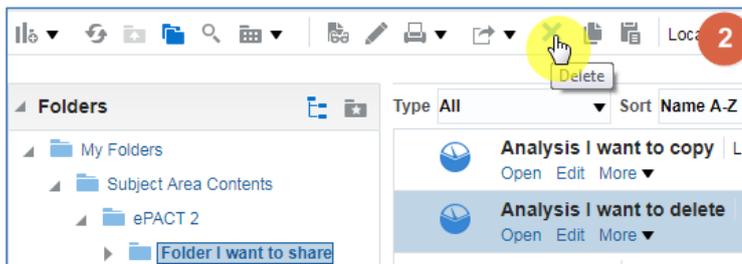
Delete content

To delete content:

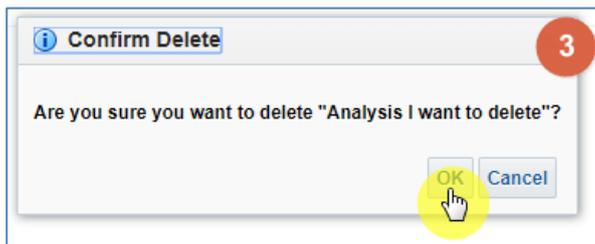
1. Select what you would like to delete:



2. Using the 'Catalog' toolbar select 'Delete'



3. Select OK to action deletion:



 Be aware, when you delete content of a folder it is not possible to retrieve deleted content!

Building an Analysis

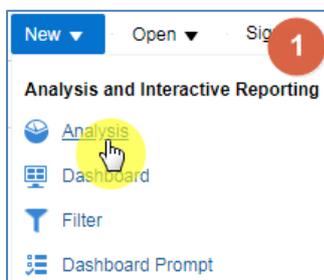
A new analysis can be created by selecting 'New' from the toolbar at the top of the page



Starting an analysis

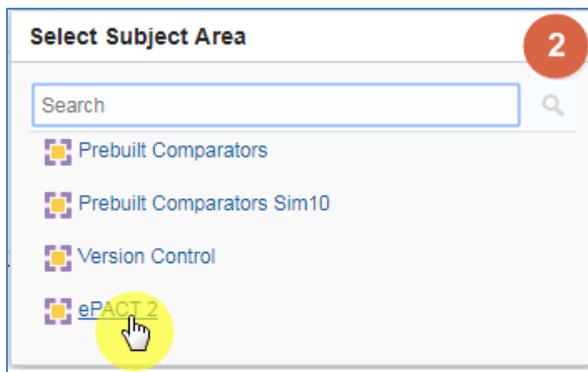
Once you have selected new you will be presented with a list of options;

4. From the list provided select 'Analysis'

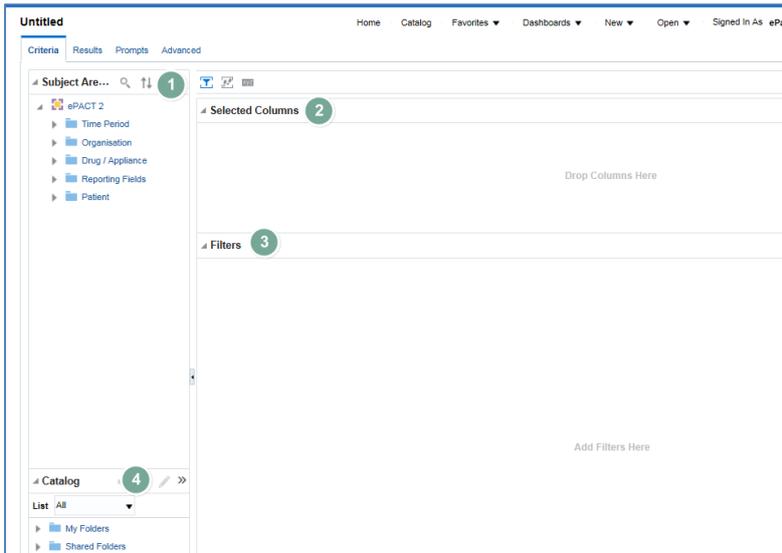


You will be then presented with 'Select Subject Area',

5. Select the 'ePACT2' subject area



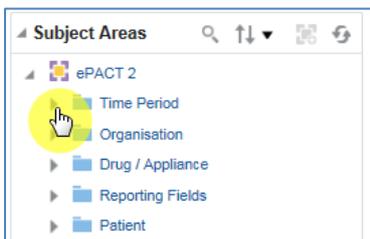
The analysis builder will then open



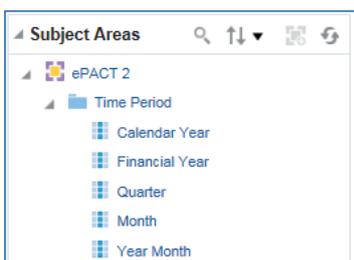
1. Subject Area	From here you can select columns to include in your analysis
2. Selected Columns	This will show the columns of data you will return
3. Filters	The filters applied to your analysis will show here
4. Catalog	From here you can select saved content to include in your analysis

Adding columns to an analysis

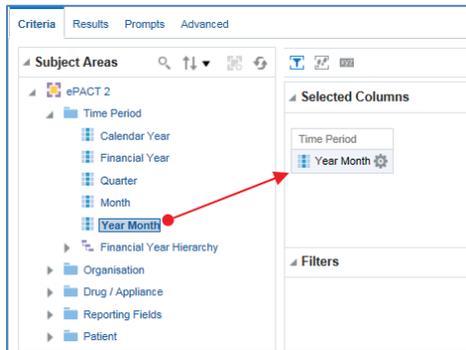
To select columns to include in your analysis first expand the folder you wish to include a column from. For example to select a time period column first select the drop down icon from the 'Time Period' folder:



You will then be presented with a list of available time period columns:



There are two ways you can select a column, either by clicking on the column you would like to include and dragging it into the 'Selected Column' pane, or by double clicking on your selected column.



 Please note: the column you include defines the level of data that will be returned. In this example by entering the 'Year Month' column this means the analysis will return data monthly, if a 'Quarter' column was included the data would come back quarterly.

 The quickest way to add columns into your analysis is to double click them from the Subject Area folder listing.

Once you have included the columns of data you wish to return, you then need to apply filters to your analysis.

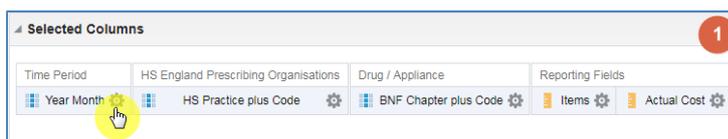
 If you did not apply filters the system would try and bring down all data the NHSBSA ePACT2 system holds. Filters are what you apply to your analysis to restrict the report to just show the data you require.

Applying filters to an analysis

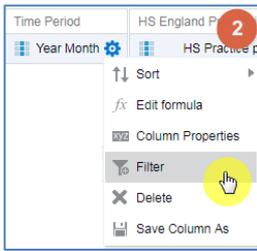
Apply a filter using a column in your report

There are two ways you can apply a filter, the first is to filter on a selected column,

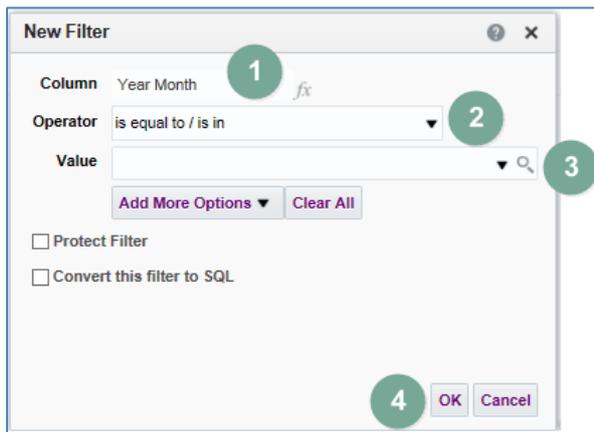
6. Select the cog icon on the column you wish to filter the analysis by



7. You will then be presented with the column options, from here select 'Filter'



This will open the 'New Filter' pane:



1. Column	Indicates the column you are applying a filter to
2. Operator	This is the condition applied to the filter
3. Value	This is where you select the value you want to filter the column on
4. OK	Select OK to apply the filter to your analysis

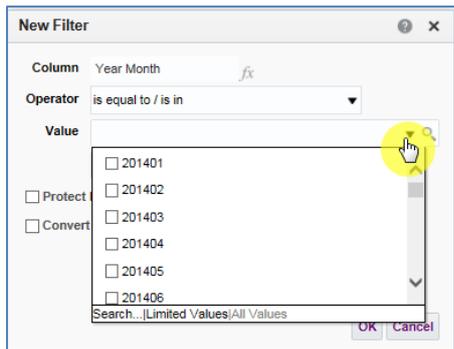


Never type into the value box; you should always select a value by either selecting the drop down arrow or selecting the magnifying glass.

Selecting a value to filter on

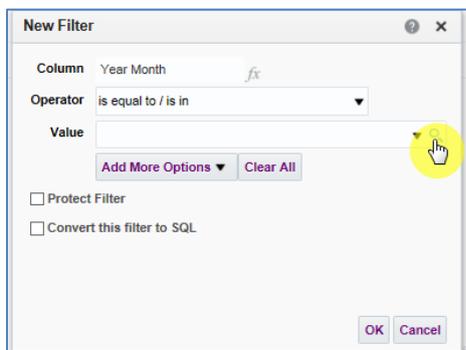
There are two ways of selecting a value to filter on;

The first is to select the drop down arrow option and pick a value from the available list:

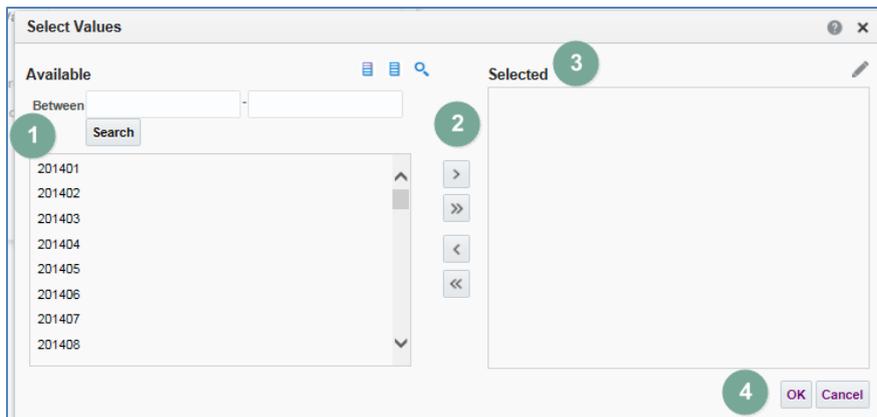


 If you select the drop down this will only display the first 250 values available.

The second is to select the magnifying glass icon.



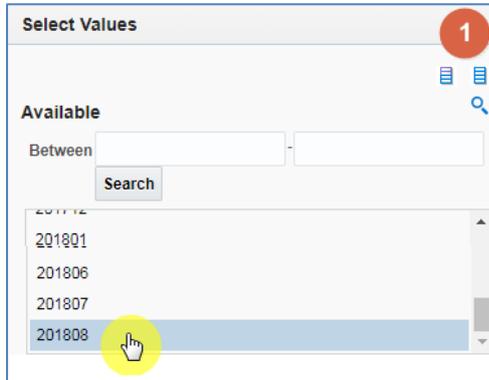
Selecting the magnifying glass will bring up the 'Select Values' pane:



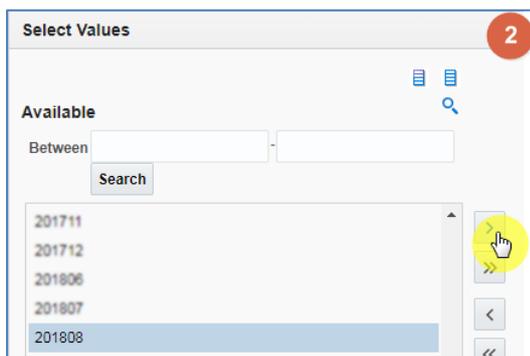
1. Available values	The left hand box displays all available values, you can select a value by clicking on it to highlight the value
2. Arrow icons	The middle icons allow you to move a value to or from the selected box
3. 'Selected'	the values in the selected box are what will be applied to your analysis
4. 'OK'	Selecting 'OK' will action the filter and apply it to your analysis

Within the 'Select Values' pane you can select a value either by double clicking on it, this will move it from the 'Available' section to the 'Selected' section.

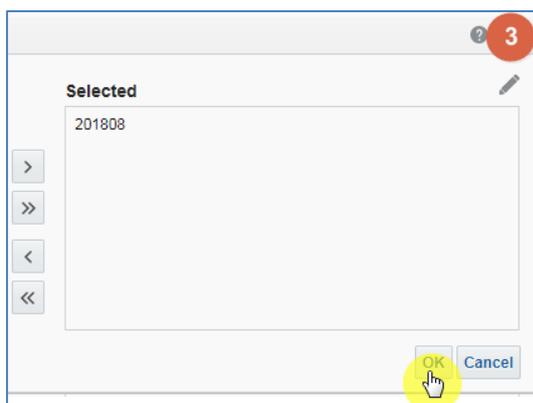
1. Alternatively select the value to highlight it:



2. Select the single right facing arrow icon; this will move the highlighted value into the 'Selected' section



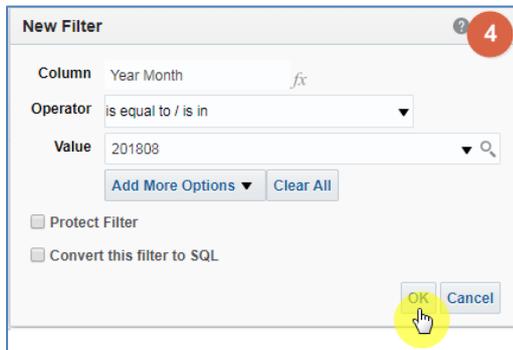
3. Select 'OK to apply the filter:



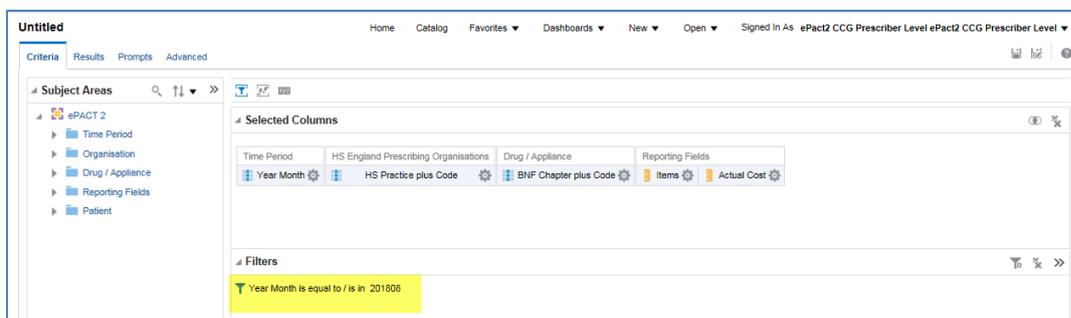
 Selecting this icon  will move only the highlighted value

Selecting this icon  will move all available values

4. Select 'OK' in the 'New Filter' pane, this pane will show the filter you are about to apply, in this example it is for the year month being in or equal to 201808 (August 2018):



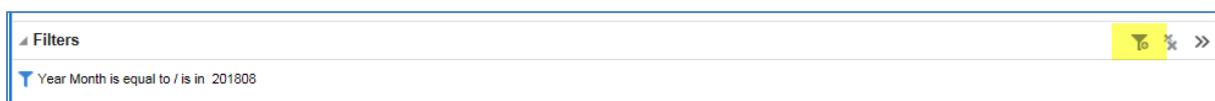
When you select OK the filter is then applied to the analysis:



Applying a filter from the filter pane

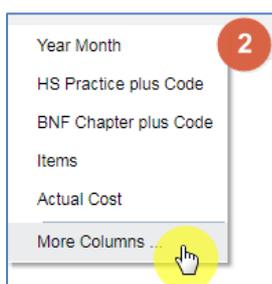
The second way to apply a filter is by using the filter pane itself,

1. within the filter pane select the funnel icon:



Selecting the funnel icon allows the selection of a column already included in your analysis to apply a filter on, or you have the option for 'More Columns...'

2. Select 'More Columns...'

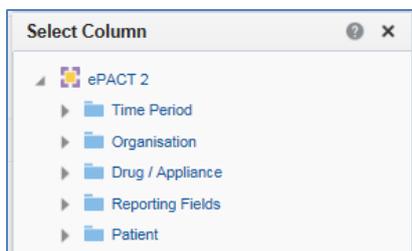




By selecting more columns, you are able to filter the analysis on a column you have not included in your report. For example in our analysis we have included the 'Practice Plus code' column this means the data is coming back at practice level. If I filter on the practice column it is only going to give me the option to find a practice.

Whereas if I want to get data back at practice level for all practices under my CCG I would need to filter on a 'Commissioner provider' column, I do not have a Commissioner provider column included in my analysis, but I can pick this column to filter on from the 'More Columns...' option

You will then be presented with the 'Select Column' list



In this example we are going to filter the report by a CCG.

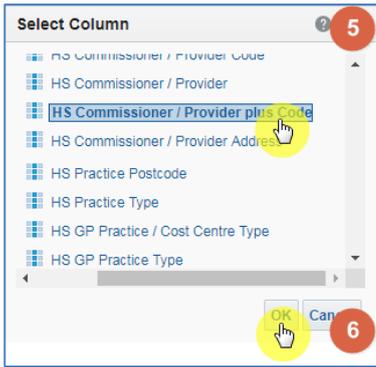
3. Select the drop down option for the 'Organisation' folder



4. Select the drop down for 'HS England Prescribing Organisations'

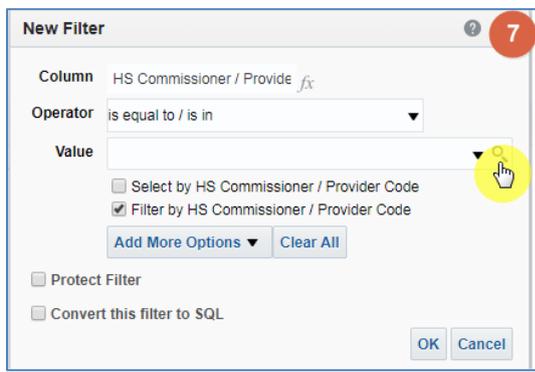


5. Scroll down the list and find the 'HS Commissioner / Provider plus Code' column, click on the column to highlight
6. select 'OK'

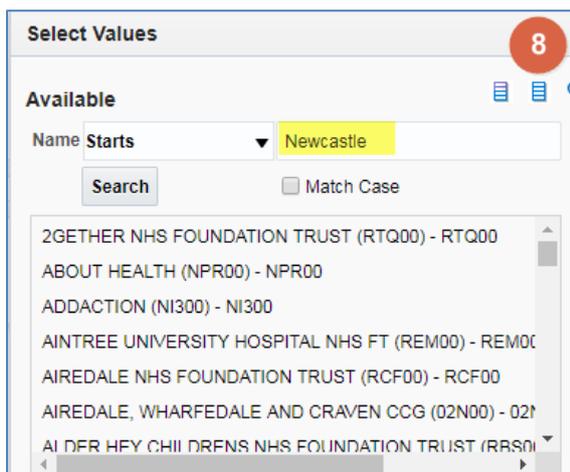


You are then presented with the 'New Filter' pane

7. Select the magnifying glass icon



8. In the select values pane we are going to search for our organisation, in this example we are going to look for 'Newcastle Gateshead CCG' in the empty search box in 'Newcastle'

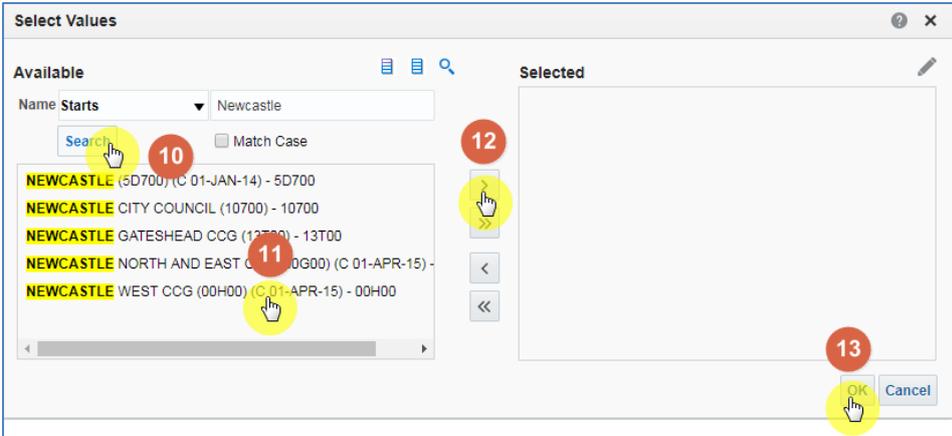


9. We will leave the operator as 'Starts' if you select the drop down option you will see the other operator options available:

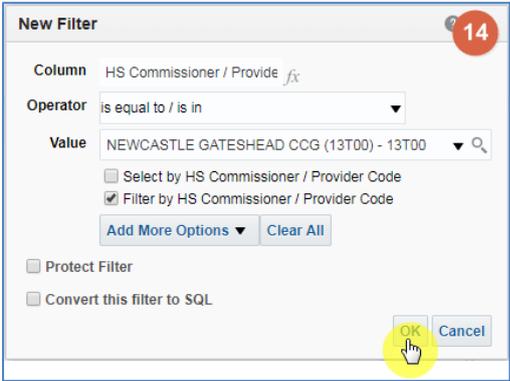


Starts	Will search for a value that starts with the value you have typed in
Contains	Will search for a value that contains the value you have typed in
Ends	Will search for a value that ends in the value you have typed
Is Like (pattern match)	Will search for a value similar to what you have typed

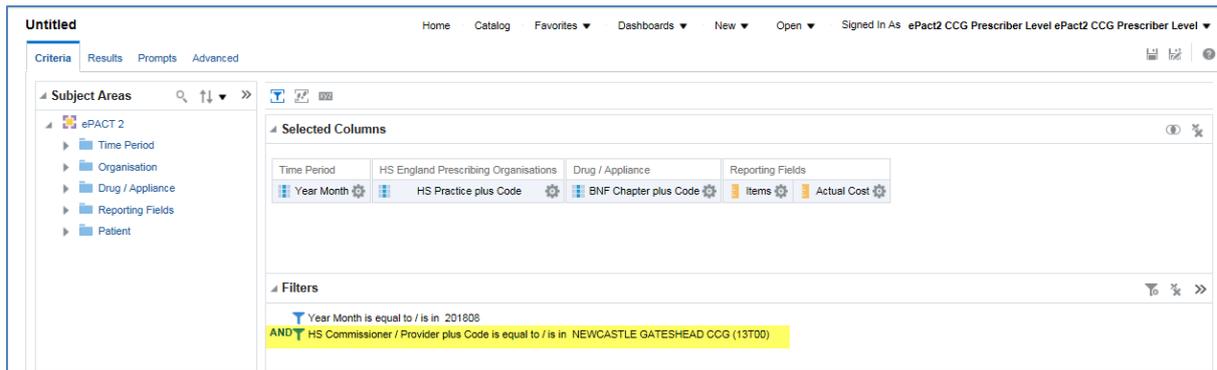
10. Select 'Search' to search the available values for Commissioner / Providers that starts with 'Newcastle'
11. Select, Newcastle Gateshead CCG to high light
12. Select the single arrow to move to selected
13. Select OK



14. Select 'OK' to apply the filter to your analysis:

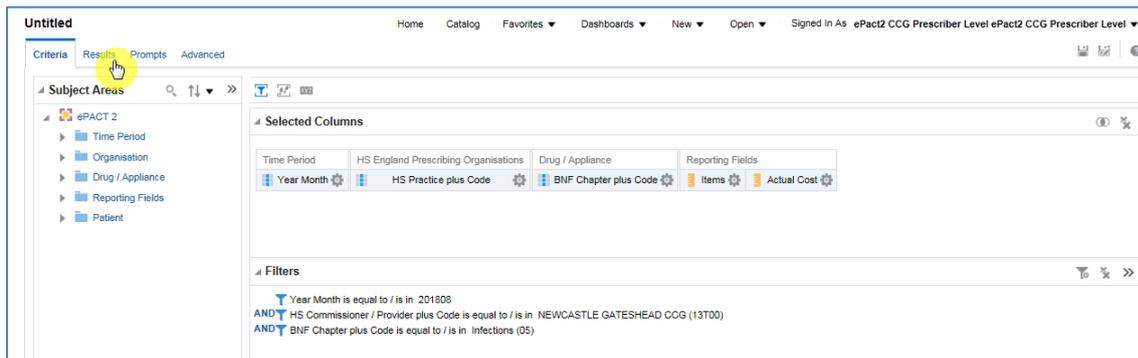


The filters pane will then be populated with your organisation filter:



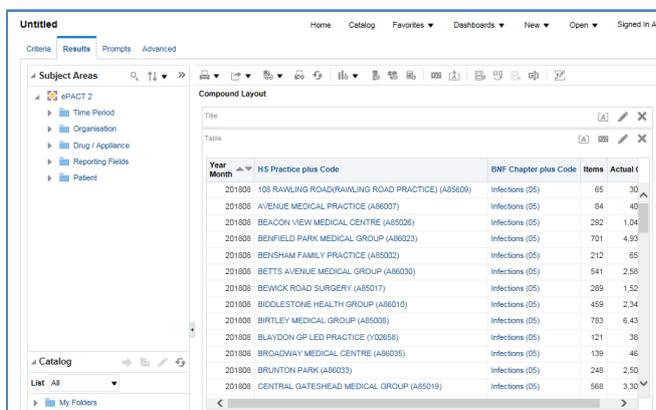
Running your results

Select the 'Results' icon to run your analysis:



In this example we have also filtered on the 'BNF Chapter plus Code' column so the results will return only for 'Chapter 5 Infections'

Your results will return in a table, as per below image:



Content paging

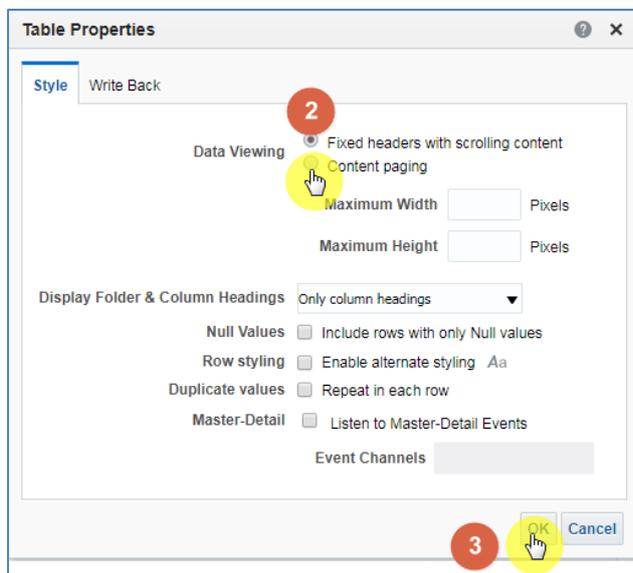
1. Select the 'View Properties' icon at the top of your table view.



The screenshot shows a table with the following data:

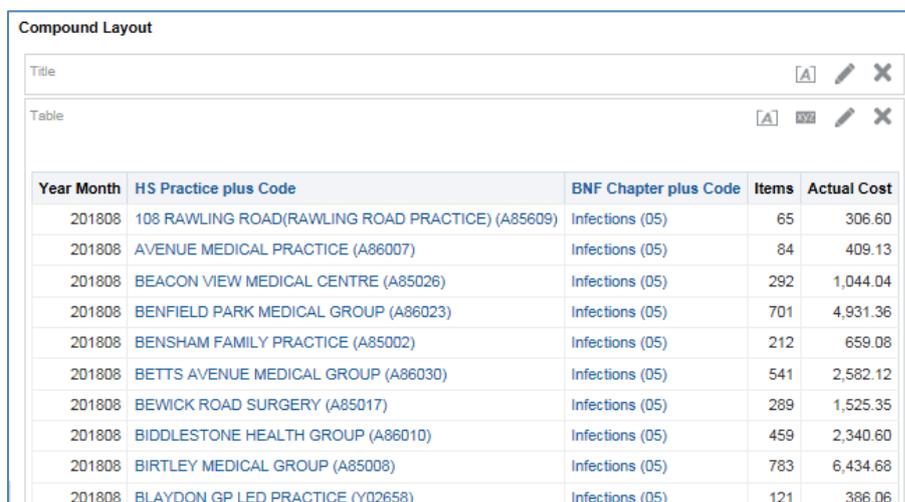
Year Month	HS Practice plus Code	Items	Actual Cost
201807	108 RAWLING ROAD(RAWLING ROAD PRACTICE) (A85609)	72	530.65
201807	PONTELAND ROAD HEALTH CENTRE (Y02711) (D 01-APR-18)	86	347.60

2. You will then be presented with the 'Table Properties' from here select 'Content paging'
3. select 'OK'



The 'Table Properties' dialog box is shown with the 'Style' tab selected. Under 'Data Viewing', the 'Content paging' radio button is selected and highlighted with a yellow circle and a hand cursor. The 'OK' button at the bottom right is also highlighted with a yellow circle and a hand cursor. A red circle with the number '2' is next to the 'Content paging' option, and a red circle with the number '3' is next to the 'OK' button.

This will then fit your table to the screen, as per below image:



The 'Compound Layout' window displays a table with the following data:

Year Month	HS Practice plus Code	BNF Chapter plus Code	Items	Actual Cost
201808	108 RAWLING ROAD(RAWLING ROAD PRACTICE) (A85609)	Infections (05)	65	306.60
201808	AVENUE MEDICAL PRACTICE (A86007)	Infections (05)	84	409.13
201808	BEACON VIEW MEDICAL CENTRE (A85026)	Infections (05)	292	1,044.04
201808	BENFIELD PARK MEDICAL GROUP (A86023)	Infections (05)	701	4,931.36
201808	BENSHAM FAMILY PRACTICE (A85002)	Infections (05)	212	659.08
201808	BETTS AVENUE MEDICAL GROUP (A86030)	Infections (05)	541	2,582.12
201808	BEWICK ROAD SURGERY (A85017)	Infections (05)	289	1,525.35
201808	BIDDLESTONE HEALTH GROUP (A86010)	Infections (05)	459	2,340.60
201808	BIRTLEY MEDICAL GROUP (A85008)	Infections (05)	783	6,434.68
201808	BLAYDON GP LED PRACTICE (Y02658)	Infections (05)	121	386.06

Saving, Printing and Exporting Analysis

Save your analysis

Once you have your results it is possible to save your analysis to re-open in the future.



When you save an analysis within the system, you are not saving the results data; you are saving the criteria that brought back those results. This means you are not saving large amounts of data therefore there is no limit to the amount of content you can save.

To save your analysis you can select the 'Save or 'Save As' icon available in the top right hand corner of your results pane:

The screenshot shows a software interface with a toolbar at the top. In the top right corner of the toolbar, there are two yellow icons: a floppy disk (Save) and a floppy disk with a plus sign (Save As). Below the toolbar is a section titled 'Compound Layout' containing a 'Title' field and a 'Table' field. The table contains the following data:

Year Month	HS Practice plus Code	BNF Chapter plus Code	Items	Actual Cost
201808	108 RAWLING ROAD(RAWLING ROAD PRACTICE) (A85609)	Infections (05)	65	306.60
201808	AVENUE MEDICAL PRACTICE (A86007)	Infections (05)	84	409.13
201808	BEACON VIEW MEDICAL CENTRE (A85036)	Infections (05)	282	1,044.04

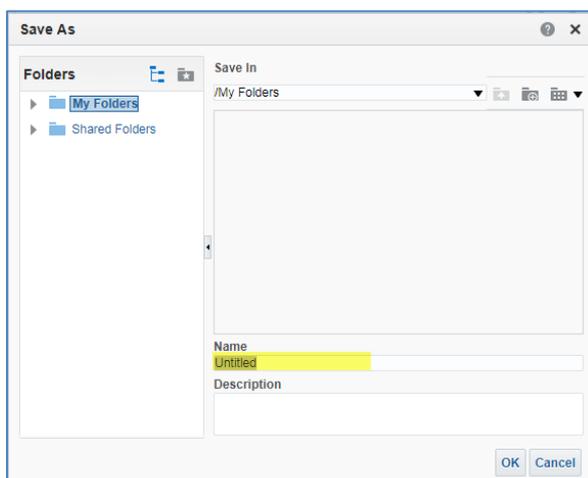


Save – saves the analysis



Save as – will save the analysis as a separate new analysis.

When you select save the system will then give you the option to choose the folder you want your analysis saved and allow you to name the document, the default name will show as 'Untitled'

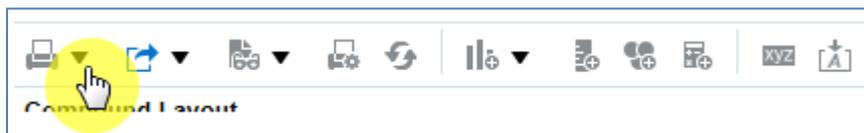


Once you have named the analysis select 'OK' to action the save.

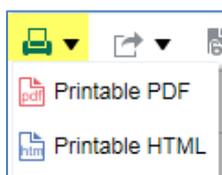
 The first time you select save or save as on a new analysis they will do the same thing, save the document.

Print your analysis

To print you can select the 'Print' icon from the toolbar above the analysis results

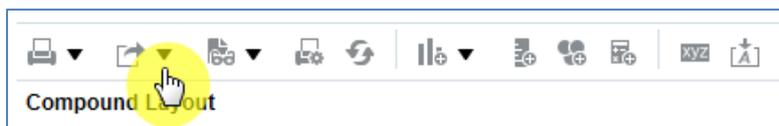


You will then be presented with the print options:

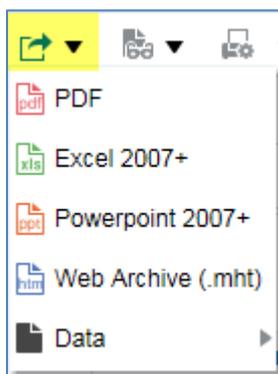


Export your analysis

To export your analysis you can select the 'Export' icon from the toolbar above the compound layout:



You will then be presented with the export options, CSV can be found under the 'Data' dropdown options:

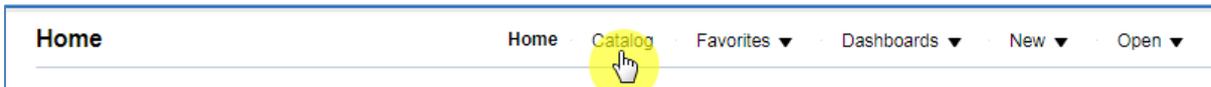


Re-using and editing saved reports and analysis

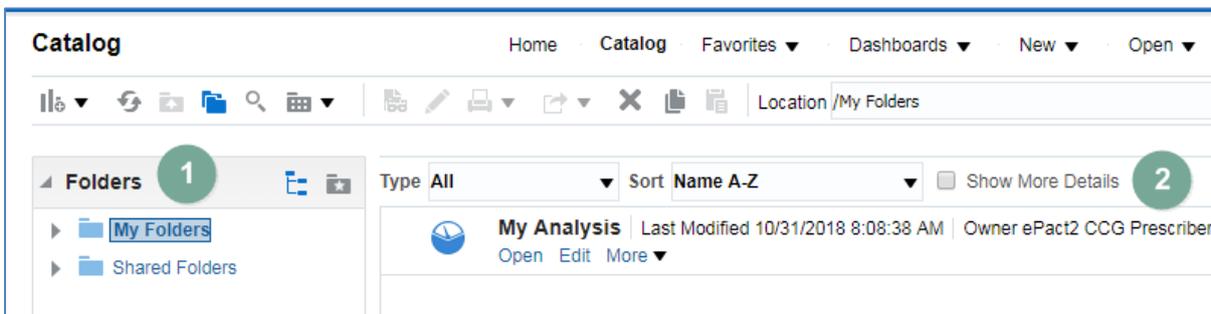
One of the benefits of ePACT2 is that you can save content, once you have saved your content it is possible to not only open it and view it, but you can also edit your saved content.

Open saved content

To open saved content first select the 'Catalog' icon from the Home toolbar:

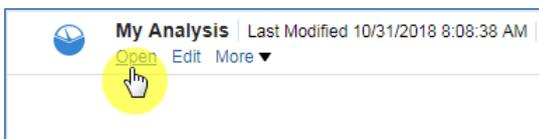


You will then navigate to the ePACT2 Catalogue



3. Folders	Displays the available folders to open content from
4. Folder contents	When you click on a folder to highlight, the middle pane will show the content of that folder

When you have navigated to the folder your analysis is saved in, you can open your analysis to view the results by selecting the 'Open' icon. The icon is located beneath the analysis title:



When you select open the analysis will run and return your results.

Year Month	HS Practice plus Code	Items	Actual Cost
201807	108 RAWLING ROAD(RAWLING ROAD PRACTICE) (A85609)	72	530.65
201807	PONTELAND ROAD HEALTH CENTRE (Y02711) (D 01-APR-18)	86	347.60
201807	BLAYDON GP LED PRACTICE (Y02658)	94	315.38
201807	CHOPWELL PRIMARY HEALTHCARE CENTRE (A85024)	103	213.12
201807	NEWCASTLE MEDICAL CENTRE (A86027)	106	435.73
201807	NEWCASTLE HOSPITALS COMMUNITY HEALTH (Y04331)	127	430.13
201807	GATDOC OOH (A85621)	126	547.84

Edit saved content

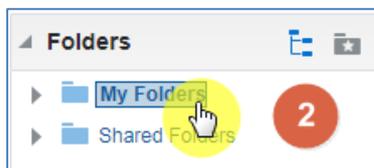
Another feature of ePACT2 is the ability to edit your saved content, for example if you have an analysis you run last month which you saved, you can edit this analysis and change the time period to get your data for this month.

To edit your saved content:

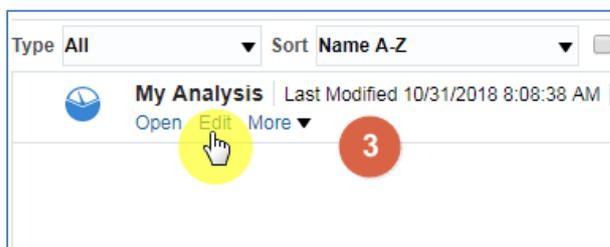
1. Navigate to the 'Catalog' icon from the toolbar



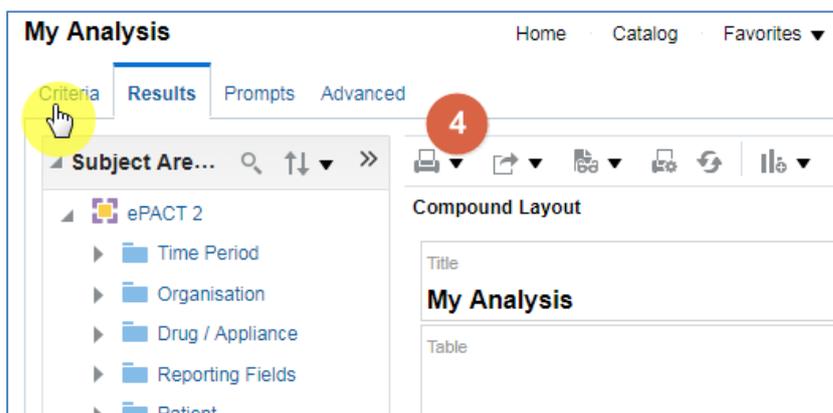
2. Select the folder you have saved your analysis to.



3. Find the analysis you wish to edit, beneath the analysis title select the 'Edit' option



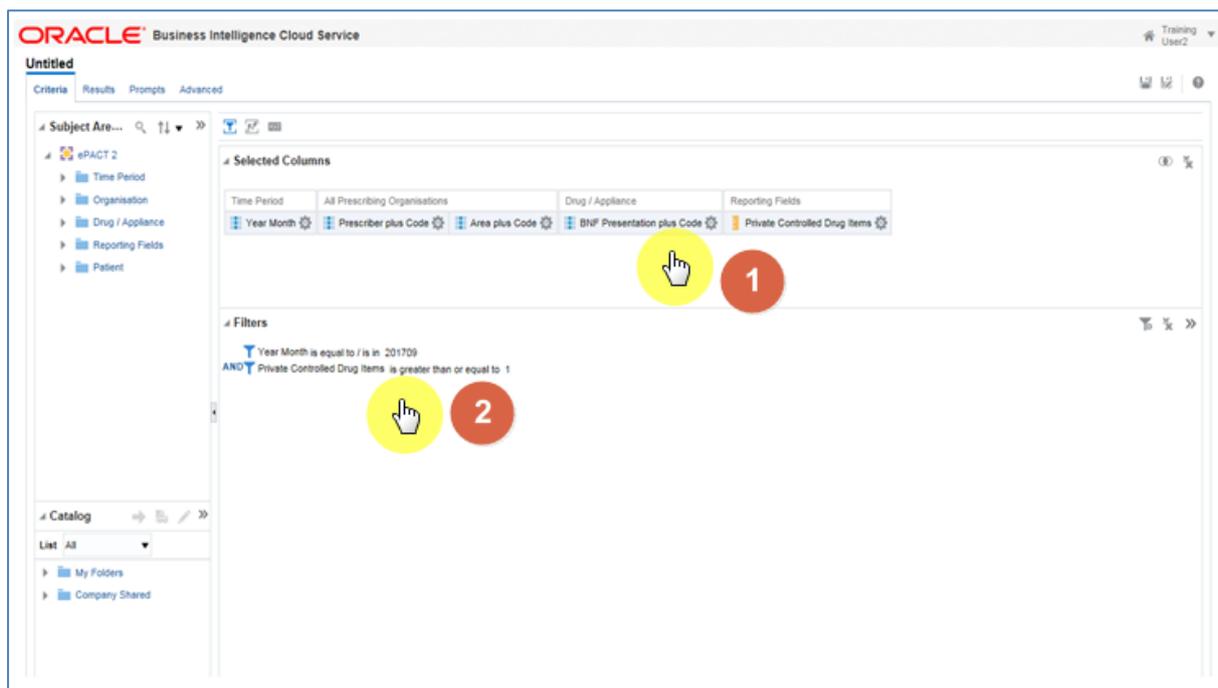
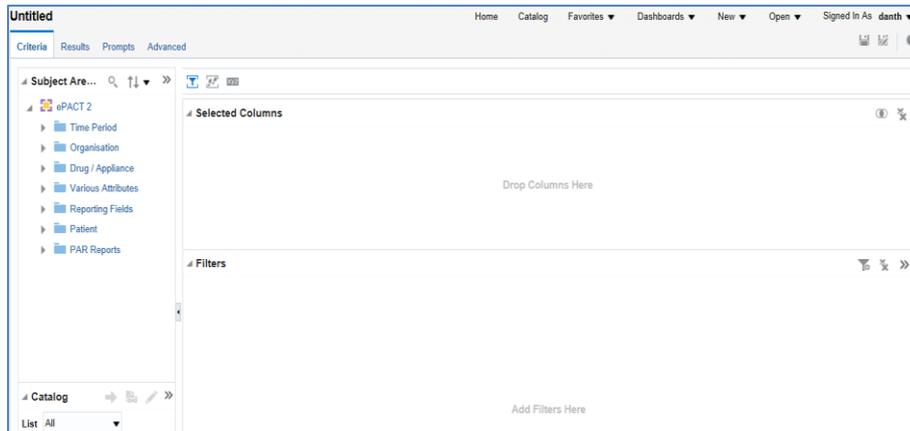
4. Your analysis will open on the results page; you do not need to wait for the results to load if you are going to edit the analysis. As soon as the report opens select 'Criteria'



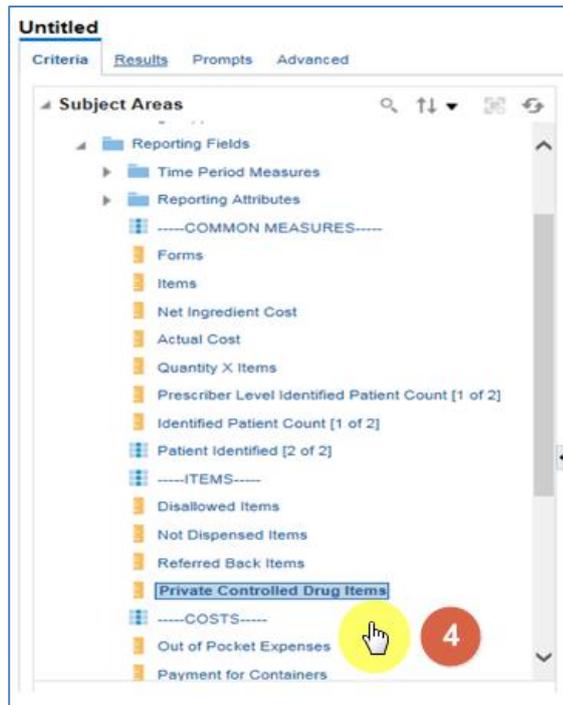
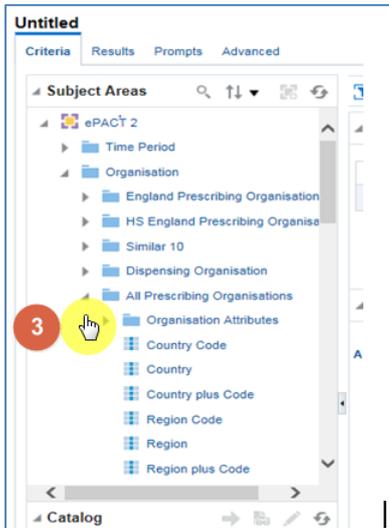
Accessing Private CD Prescribing Information

Data for private CD prescribing for those private prescribers under the NHS England Local Team the user is registered under can be accessed via the system.

Open a new analysis:



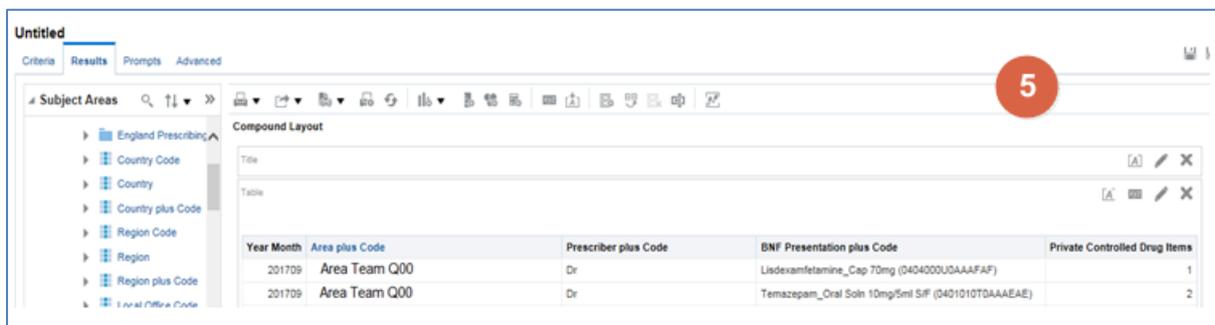
1. Select columns for time period, prescriber, Area Team, BNF presentation and Private Controlled Drug Items
2. Add filters to limit the time period required and to only show items which are private controlled drugs.



3. Organisation columns, such as Prescriber plus Code & Area plus Code must be selected from 'All Prescribing Organisations'.

 Data for private prescribing will not return if 'England Prescribing Organisations' is selected.

4. The 'Private Controlled Drug Items' column is available to select under the 'Reporting Fields' folder in the Subject Area tree.



5. Data will be returned showing the BNF presentation and number of private controlled drug items for the area team the user is registered under.

Getting Help



Additional training material and user guides

The NHSBSA has developed a number of how to guides to help you get the best out of ePACT2. These can be found at: [Additional User Guides](#)

WebEx sessions

WebEx will be provided on a number of different topics and features. More information about these can be found here: [WebEx Training](#)