

ePACT2 User Guide

Accessing and Using Dashboards, Pre-built Reports & Quick Search

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Accessing the Dashboards

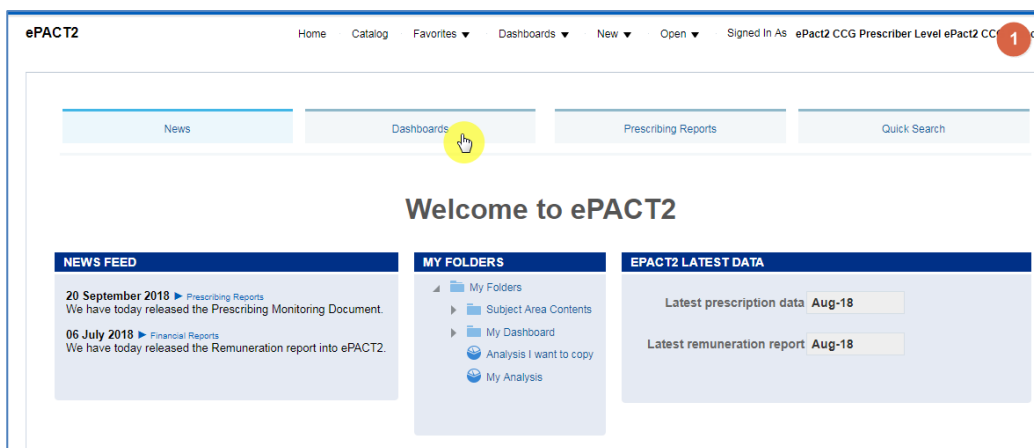
The system provides easy-to-use analysis, reports and dashboards, supporting patient safety, improving patient outcomes and medicines optimisation. Data contained within the system includes dashboards supporting the Medicine Value Programme such as:

- Medicines Safety
- Medicines Optimisation: Polypharmacy
- Antimicrobial Stewardship
- Medicines Optimisation: Generic Prescribing
- Items which should not be routinely prescribed in primary care
- Electronic Prescribing Service Utilisation
- Volume & Cost
- Respiratory Prescribing

Detailed information and specifications of the dashboards are listed here:

<https://www.nhsbsa.nhs.uk/epact2/epact2-dashboards specifications>

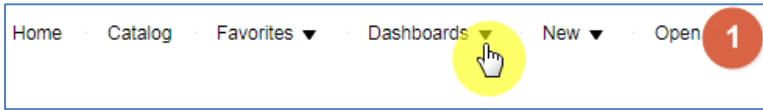
1. To access the dashboards from the 'Landing page select the 'Dashboards' icon:



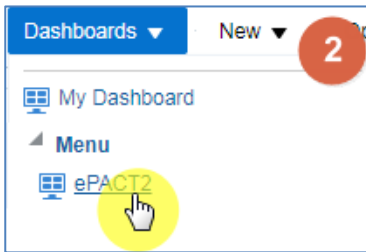
You will then navigate to the dashboard page which will display all available dashboards, from here select the blue link for the dashboards you wish to view.

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'



Navigating the Dashboards

All dashboards provided by the NHSBSA operate in a similar way. for the purposes of the guide the 'Polypharmacy Prescribing Comparators' dashboard will be used however the functionality is uniform across the dashboards.

Selecting a dashboard page

The screenshot shows the 'Polypharmacy Prescribing Comparators' dashboard. At the top, there is a navigation bar with 'Home', 'Catalog', 'Favorites', 'Dashboards', 'New', and 'Open'. The main header includes the NHS logo and 'Business Services Authority BETA'. Below this, there is a section for 'Please select dashboard page:-' with tabs for 'Comparator Summary', 'Comparator by age group', 'Datasets', and 'Supporting Information'. A 'Dashboard criteria selection' section allows users to choose a comparator, month, and CCG. The main content area features a bar chart titled 'BARNSELEY CCG highlighted within results for all CCGs during 201608' and a table of values:

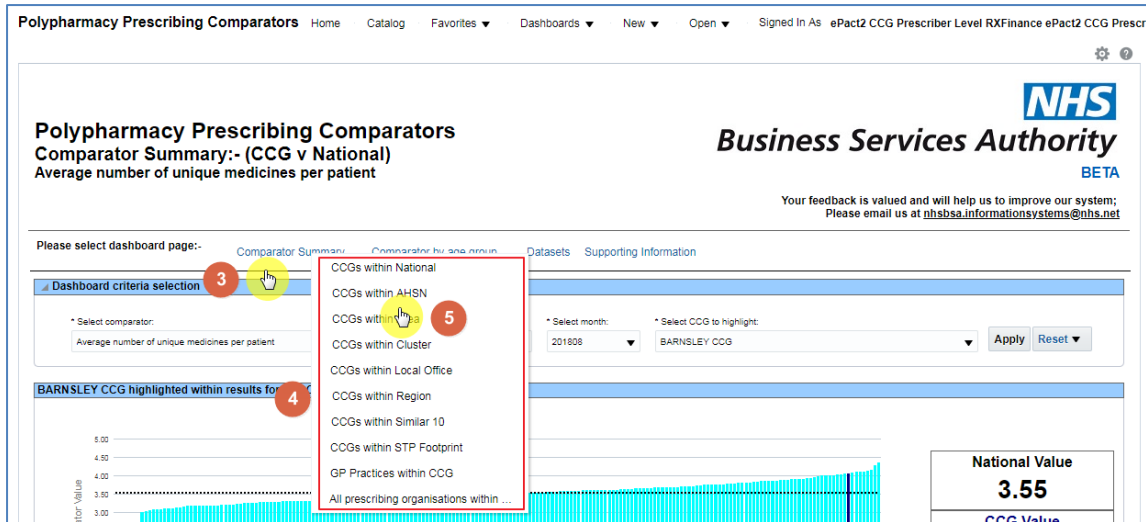
National Value	3.55
CCG Value	4.06
CCG v National	(+0.52)

Below the chart is a 'Trend over time for BARNSELEY CCG' section with another chart and a 'Comparator Details' section. A red circle with the number '1' is positioned on the right side of the dashboard, indicating the scroll bar.

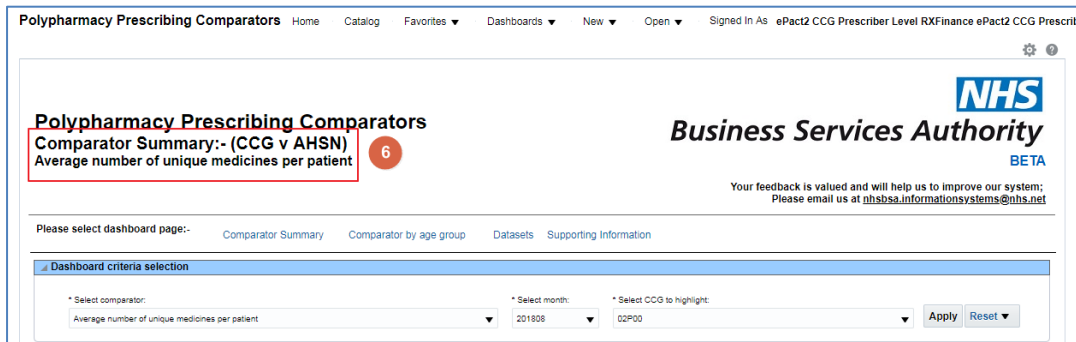
1. You may need to use the scroll bar to view the entire dashboard.
2. A selection of links will be available to select the allow the user to navigate to the page of the dashboard

This screenshot focuses on the 'Please select dashboard page:-' section of the dashboard. It shows the same navigation bar and header as the previous screenshot. The 'Comparator Summary' tab is selected, and a dropdown menu is open, showing options: 'Comparator Summary', 'Comparator by age group', 'Datasets', and 'Supporting Information'. A red circle with the number '2' is positioned over the dropdown menu.

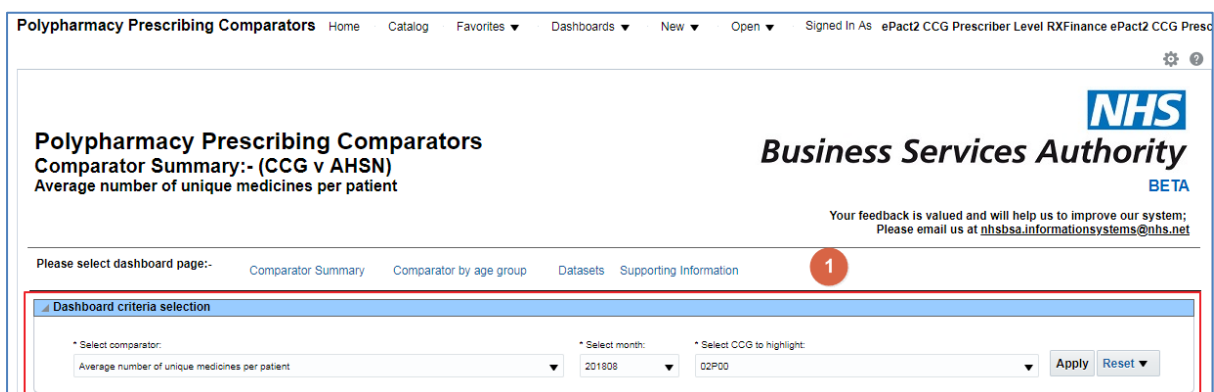
3. Select the link for the area of the dashboard required.
4. A drop down list showing the pages available under the area selected will be displayed.
5. Select the required page from the drop down list.



6. The dashboard will regenerate to the page selected.



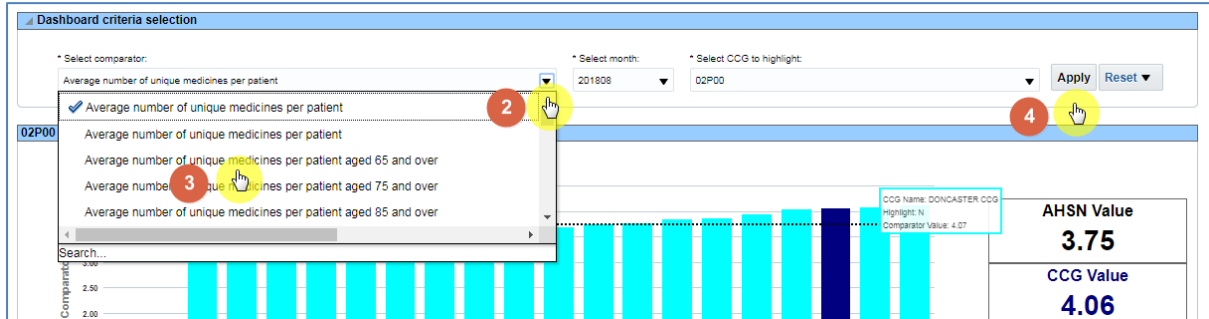
Dashboard Criteria Selection



1. The Dashboards will have a range of options to allow the user to select the criteria they wish to apply to the dashboard. The options available to select will change depending on the dashboard selected.



All dashboards will default to show the latest time period available and the organisation the user is registered under. National users will default to the first organisation alphabetically.



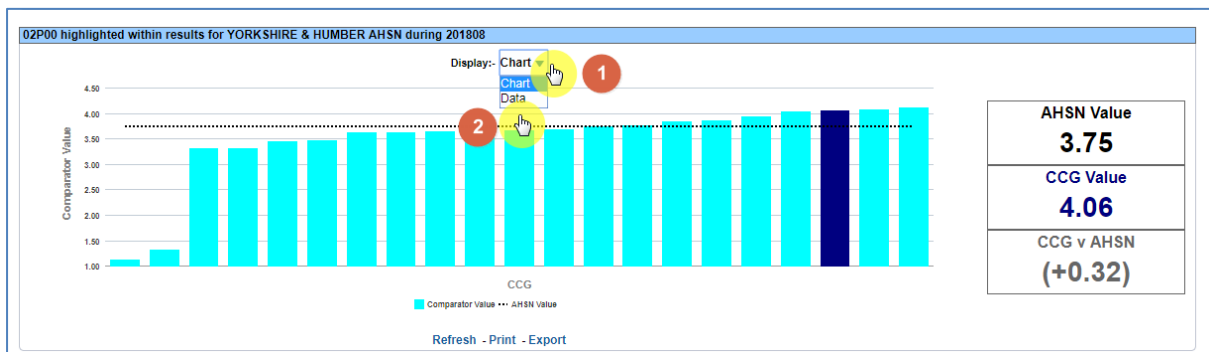
2. Select the drop down arrow to the right of the criteria.
3. A drop down list of the options available will be displayed, select the option required.
4. Once all options have been selected select 'Apply' to regenerate the dashboard to show the criteria selected.



Dashboards will not automatically regenerate once a criteria has been selected, this is to allow users to make all changes required before regenerating

Data Views

Some reports contained within the dashboard will be available in both 'Chart' and 'Data' formats.



1. Select the drop down option for the 'Display'.
2. The views available will be displayed – usually Chart and Data

Exporting and Printing the Data

Exporting Dashboard Page

Polypharmacy Prescribing Comparators Home Catalog Favorites Dashboards New Open Signed In As ePact2 CCG Prescriber Level RXFinance ePact2 CCG Prescriber

Polypharmacy Prescribing Comparators
Comparator Summary:- (CCG v AHSN)
 Average number of unique medicines per patient

Please select dashboard page:- Comparator Summary Comparator by age group Datasets Supporting Information

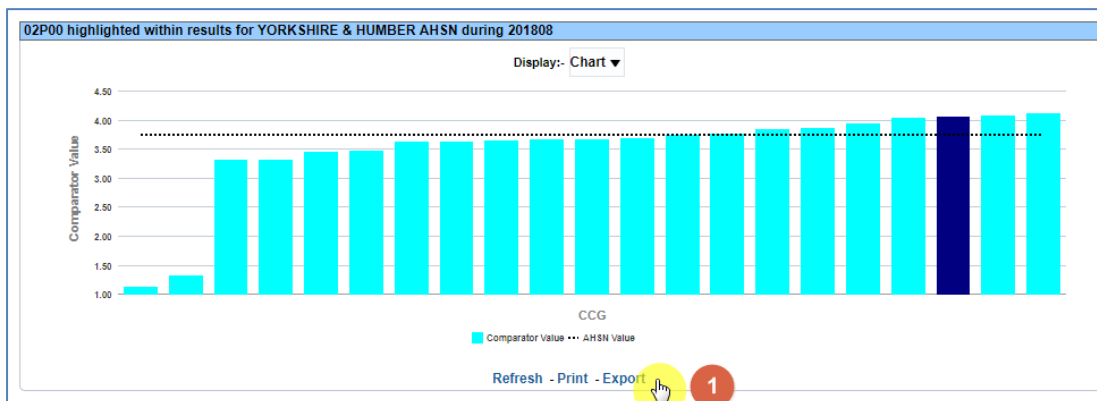
Dashboard criteria selection

* Select comparator: Average number of unique medicines per patient * Select month: 201808 * Select CCG to highlight: 02P00 **Apply** **Reset**

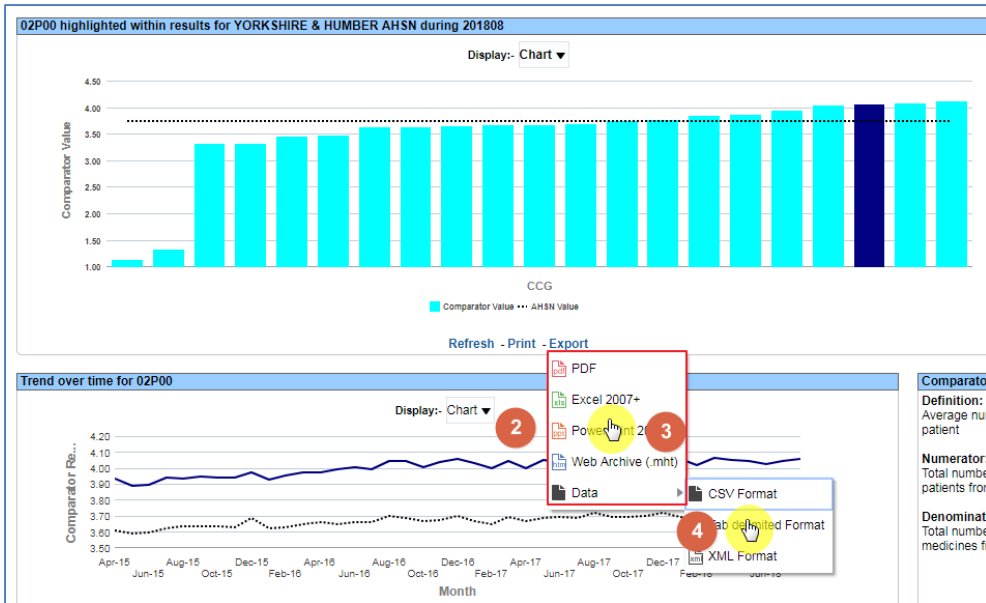
02P00 highlighted within results for YORKSHIRE & HUMBER AHSN during 201808

1. Select the 'cog' icon in the upper right hand corner
2. From the drop down list presented select the option to 'Export to Excel'
3. Select 'Export Current Page'

Exporting Individual Reports

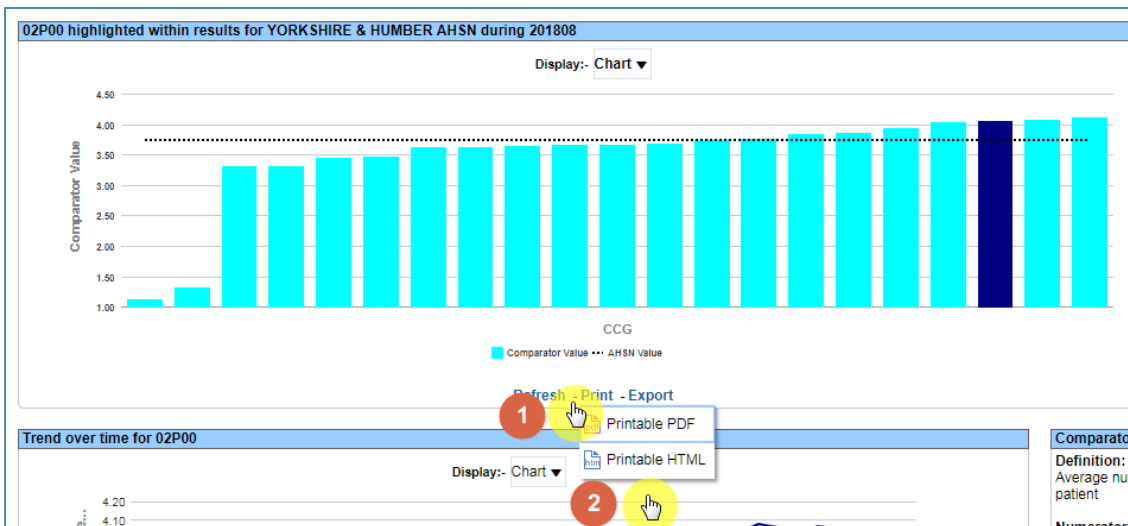


1. Select the 'Export' option below the report required.



2. A drop down list with the formats available to export in will be displayed
3. Select the format required from the list presented
4. CSV format is available under the 'Data' option

Printing

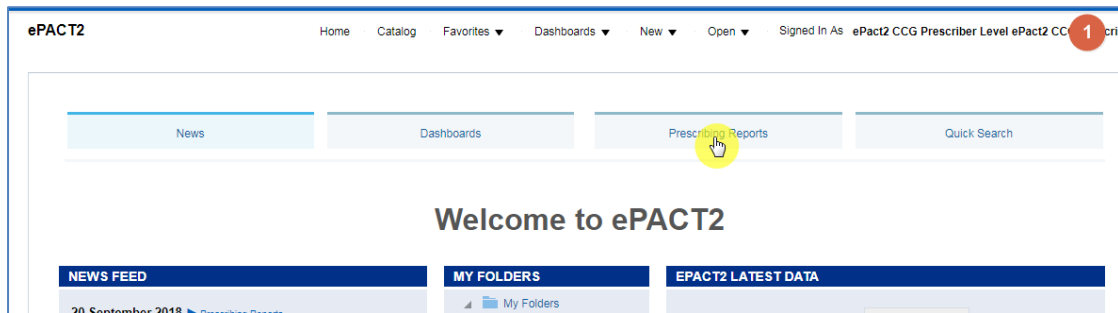


1. Select the 'Print' option below the report required
2. Select the format required from the drop down list presented

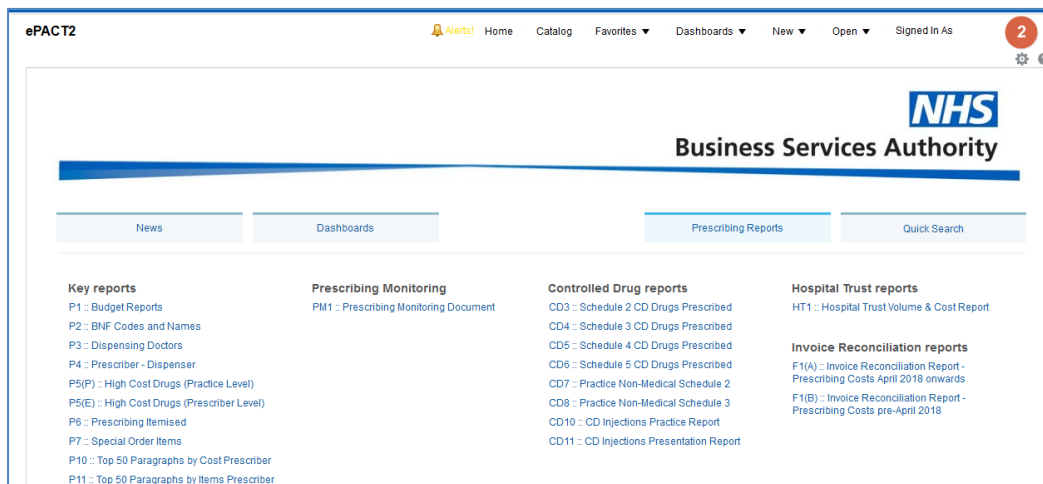
Accessing the Pre-built Reports

The 'Prescribing Reports' similar to the 'Quick Search' allow you to quickly return data for a pre-set selection of fields.

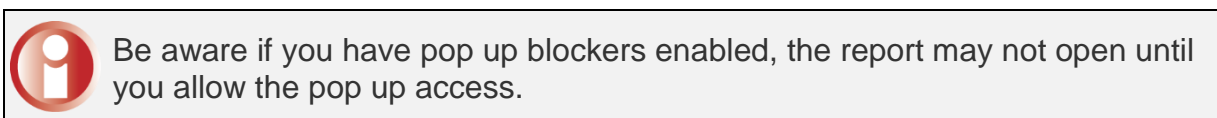
1. To access 'Prescribing Reports' from the Landing page select 'Prescribing Reports'



2. You will then be taken to the 'Prescribing Reports' section, all reports are accessed by selecting the blue link for the report you wish to view:



When you select a blue link the named report will open in a new window



The 'Prescribing Reports' all work in a similar way. When you open the report you will be prompted with the report criteria pane. In this pane you must select the criteria you want the report to run for.

The prompt pane will look similar to this; this example is the 'Prescriber Dispenser' report:

Accessing the Pre-built Reports

The screenshot shows a form with the following fields and values:

- Financial Year:** 201808 (highlighted with a red box and a '1' in a green circle)
- Commissioner / Provider plus Code:** ALE, WHARFEDALE AND CR... (highlighted with a red box and a '2' in a green circle)
- BNF Chapter plus Code:** (highlighted with a red box and a '3' in a green circle)
- Quarter:** --Select Value--
- * Practice plus Code:** ADDINGHAM SURGERY (B83620)
- BNF Section plus Code:** --Select Value--
- Year Month:** 201808
- Prescriber plus Code:** --Select Value--
- BNF Paragraph plus Code:** --Select Value--
- BNF Sub Paragraph plus Code:** --Select Value--
- BNF Chemical Substance plus Code:** --Select Value--
- BNF Product plus Code:** --Select Value--
- BNF Presentation plus Code:** --Select Value--

Buttons: OK, Reset

1) Time period	Enables you to select a time period by using the drop down option
2) Organisation	Enables you to select an organisation via the drop down option
3) BNF	Enables you to select something from the BNF via the drop down option

Once you have completed the criteria for the Prescribing Report select 'OK' to run the analysis:

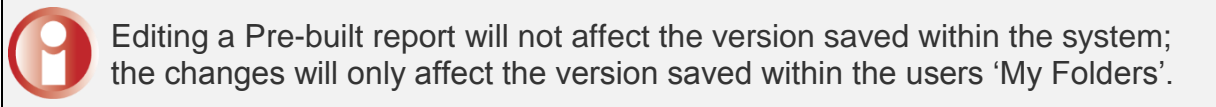
The close-up shows the 'OK' button highlighted with a yellow circle and a hand cursor, and the 'Reset' button next to it.

Editing a Pre-built Report

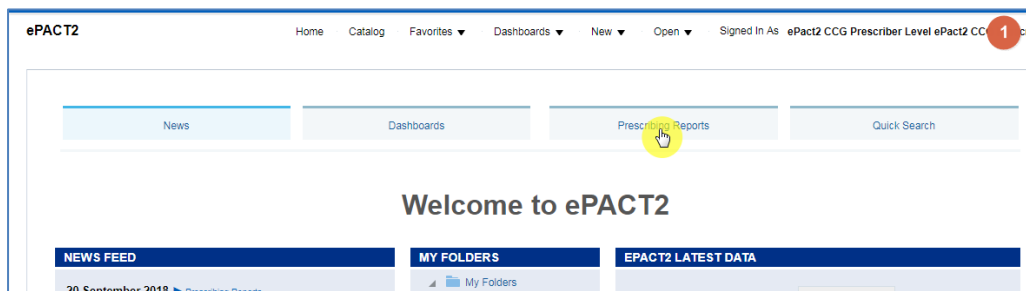
Editing and Saving a report

If you wish to edit the information returned within a Pre-built report it is possible to edit the report.

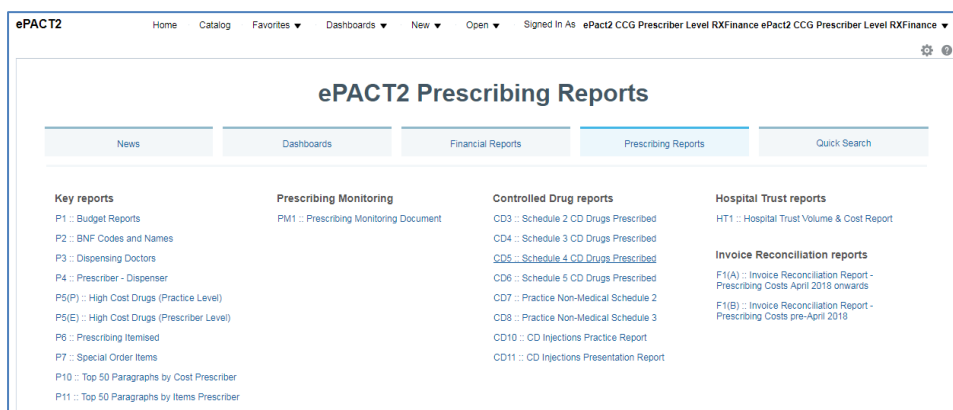
The edited version can then be saved to your 'My Folders' to be accessed



- To access 'Prescribing Reports' from the Landing page select 'Prescribing Reports'



You will then be taken to the 'Prescribing Reports' section, all reports are accessed by selecting the blue link for the report you wish to view:



When you select a blue link the named report will open in a new window

Financial Year --Select Value-- * Commissioner / Provider plus Code BARNLEY CCG (02P00) BNF Chapter plus Code --Select Value--
 Quarter --Select Value-- * Practice plus Code APOLLO COURT MEDICAL CENTRI BNF Section plus Code --Select Value--
 Year Month 201808 Prescriber plus Code --Select Value-- BNF Paragraph plus Code --Select Value--
 BNF Sub Paragraph plus Code --Select Value--
 BNF Chemical Substance plus Code --Select Value--
 BNF Product plus Code --Select Value--
 BNF Presentation plus Code --Select Value--
 OK Reset

Edit - Refresh
 2

2. Select the 'Edit' link

Criteria Results Prompts Advanced
 3
 4

Selected Columns
 Time Period England Prescribing Organisations
 Financial Year Quarter Month Year Month Commissioner / Provider Commissioner / Provider Code Commissioner / Pr
 Filters
 Month is prompted

3. Select 'Criteria' to return to the analysis builder and make any changes required

4. Once any changes have been made select 'Save As' to save the updated copy of the report

Save As
 Folders My Folders ePACT2 Menu
 Save In /My Folders
 Name Prescriber Dispenser updated
 Descr
 OK Cancel
 5
 6
 7

Paragraph plus Code is prompted
 Sub Paragraph plus Code is prompted
 Chemical Substance plus Code is prompted

5. Select the folder to save the report to

6. Name the report appropriately

7. Select 'Ok' to save the report



User are only able to save content to their 'My Folder' or a sub folder under this, if another folder is selected an error message will be returned

Accessing an updated report

From the 'Landing' page:

The screenshot shows the ePACT2 landing page. At the top, there is a navigation bar with the ePACT2 logo and several menu items: Home, Catalog, Favorites, Dashboards, New, Open, Signed In As, and two instances of ePact2 CCG Prescriber Level RXFinance. Below the navigation bar is a large heading "Welcome to ePACT2". Underneath this heading are five tabs: News, Dashboards, Financial Reports, Prescribing Reports, and Quick Search. The main content area is divided into three columns. The left column is titled "NEWS FEED" and contains three news items with dates and categories. The middle column is titled "MY FOLDERS" and shows a folder named "My Folders" with a sub-item "Prescriber Dispenser updated" and a red circle containing the number 1. The right column is titled "ePACT2 LATEST DATA" and contains two data points: "Prescription Data: Aug-18" and "Remuneration Report: Aug-18". At the bottom of the page, there is a footer with contact information and a copyright notice for NHS Business Services Authority.

1. Select the hyperlink for the report within the 'My Folders' section of the Landing page

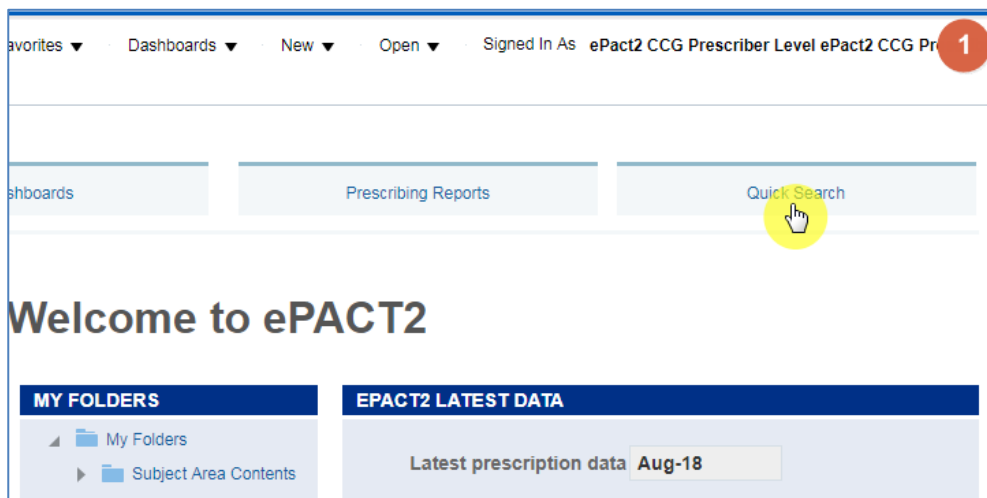
Using Quick Search

The Quick Search analysis is a standard report template and can be found via the landing page.

The report will allow you to quickly return data for a preset selection of fields. The report will be generated for any organisation or BNF level selected by you in the analysis prompts.

The additional benefit of the Quick Search is that you can see the BNF Hierarchy structure when selecting your products.

1. From the 'Landing page' select 'Quick Search'



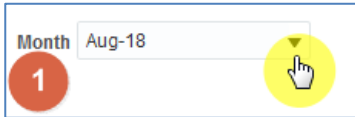
The 'Quick Search' will then open in a new tab, and you will be presented with the 'Quick Search' criteria pane:

1) Time period	Select the time periods you want the report to run for
2) Organisation	Select the organisation you want the report to run for
3) BNF	Select something from the BNF you want the report to run for

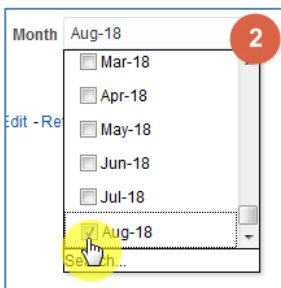
Completing the Quick Search criteria

The time period selected will default to the latest month held in the system;

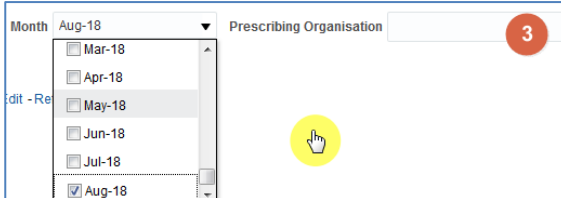
1. select the drop down arrow for the time period prompt



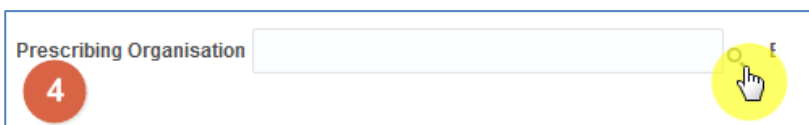
2. Select the time period you require by marking the check box:



3. Once you have selected the required time periods left click your cursor anywhere on the white part of the screen and the prompt will update:



4. Select the magnifying glass icon next to the 'Prescribing Organisation' box



5. Select the magnifying glass icon at the top of the 'Choose Members' box, this will bring up the search function.




6. Type your organisation name into the 'Name' box

The screenshot shows the 'Choose Members' dialog box. The 'Name' dropdown is set to 'Starts'. The search input field contains the text 'Newcastle'. A red rectangular box highlights the search input field. In the top right corner of the dialog, there is a red circle containing the number '6'. Below the search field, there are dropdown menus for 'Children of' (set to 'Root') and 'At Level' (set to '<Any>'). A 'Search' button and a 'Match Case' checkbox are at the bottom.

7. Select the drop down arrow of the 'At Level' box and select the organisation level you wish to search at.

The screenshot shows the 'Choose Members' dialog box with the 'At Level' dropdown menu open. The dropdown list includes options: '<Any>', 'Prescribing Organisation', 'Country Level', 'Region Level', 'Local Office Level', 'Area Level', 'Commissioner / Provider Level', 'Practice Level', and 'Prescriber Level'. The 'Commissioner / Provider Level' option is highlighted in blue. A yellow circle with a hand cursor icon is positioned over this option. A red circle with the number '7' is in the top right corner. The search box still contains 'Newcastle'.

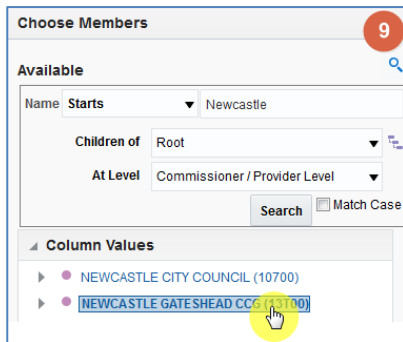
 CCG's, Hospital Trusts and ISHP's are held at Commissioner / Provider' level.

Selecting your organisation level will ensure your results are returned quicker, as the system is only looking for your organisation in this level.

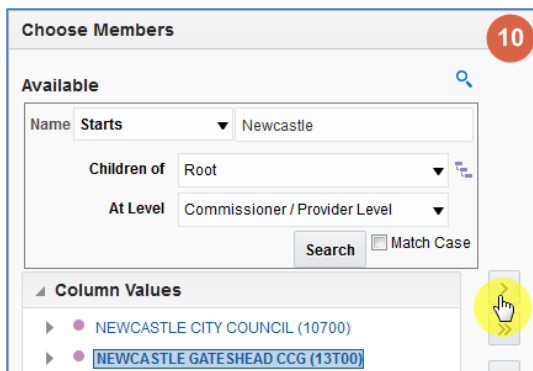
8. Select 'Search' to search for your organisation.

The screenshot shows the 'Choose Members' dialog box. The 'At Level' dropdown is now set to 'Commissioner / Provider Level'. A yellow circle with a hand cursor icon is positioned over the 'Search' button. A red circle with the number '8' is in the top right corner. The search box still contains 'Newcastle'.

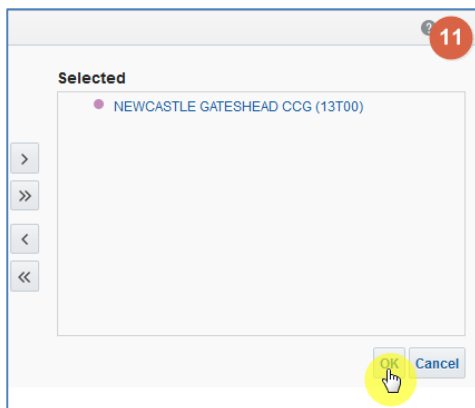
9. Click on your organisation.



10. Select the single arrow icon.



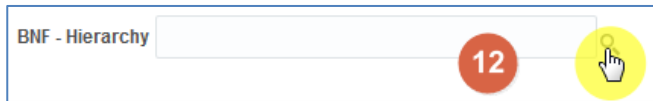
11. Select 'OK'.




Alternatively you can navigate to your organisation by selecting on the dropdown arrow titled 'Prescribing Organisation' and navigate down through the organisation structure

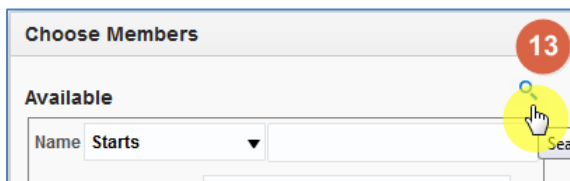


12. Select the magnifying glass for the 'BNF – Hierarchy' box

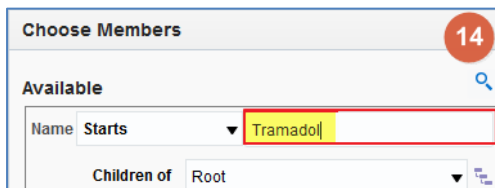


 You can look through the BNF by selecting the drop down arrow titled 'All BNF' this is similar to the BNF option in ePACT.net.

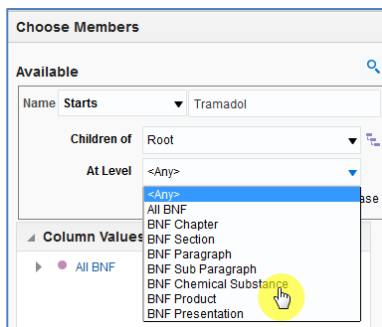
13. Select the magnifying glass icon to bring up the search function




14. Type the drug you are searching for, in this example it is Tramadol

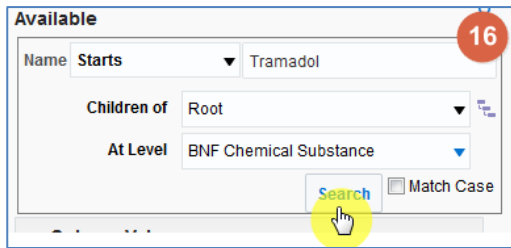


15. Change the 'At Level' to the level you want to search the BNF for, in this example it is Chemical substance

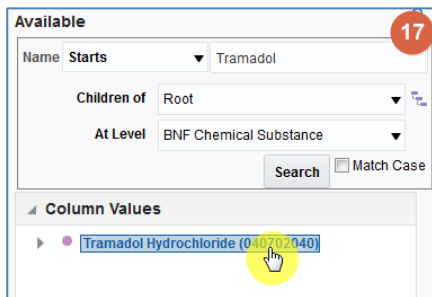


 If you did not know the level of the product you are searching for, by leaving the 'At Level' box to 'Any' this would bring back every level of the BNF that contained the name your where searching.

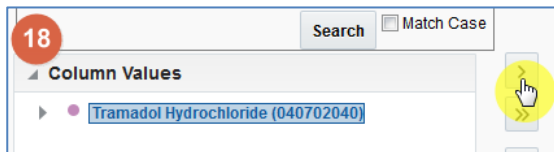
16. Click 'Search'



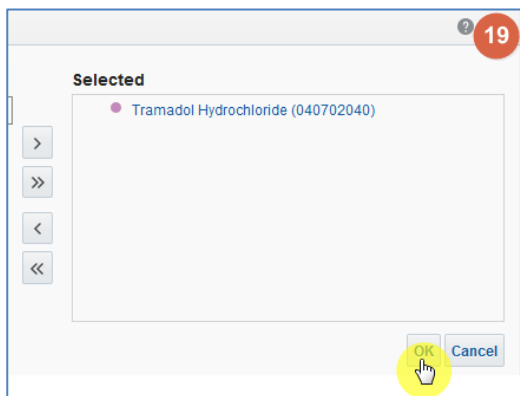
- Click on the item you want, in this example it is 'Tramadol Hydrochloride (040702040)'



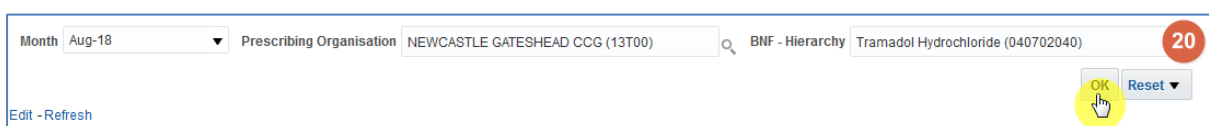
- Select the single arrow, to move the item to 'Selected'



- Click on OK



- Select OK, to run the analysis with the selected criteria



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](#)