

ePACT2 User Guide

Using the Catalogue

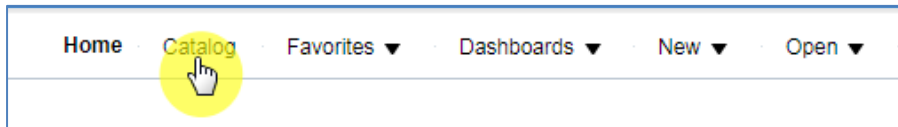
Contents

Using the Catalog	1
Getting Help.....	8

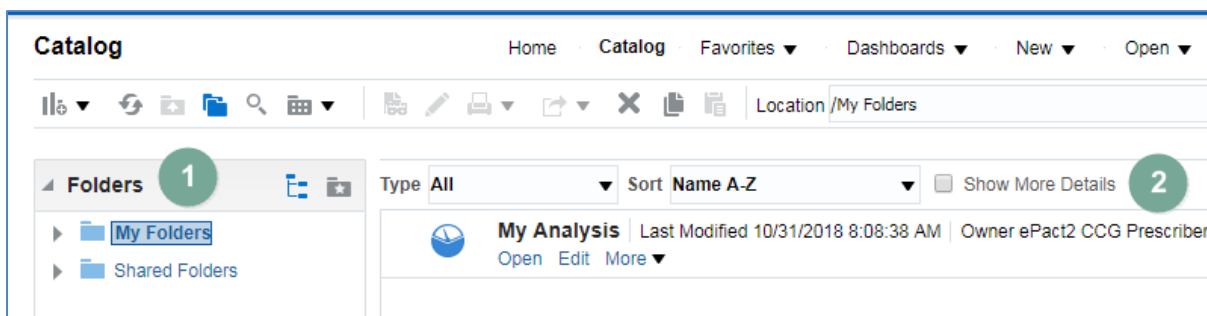
Using the Catalog

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.

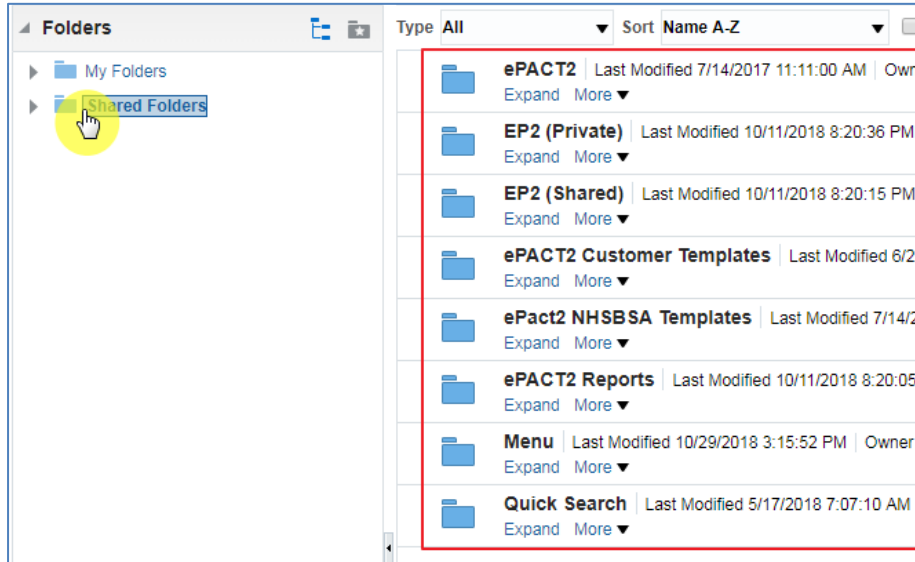
Shared Folders

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

- ePACT2
- ePACT2 NHSBSA Templates
- Quick Search

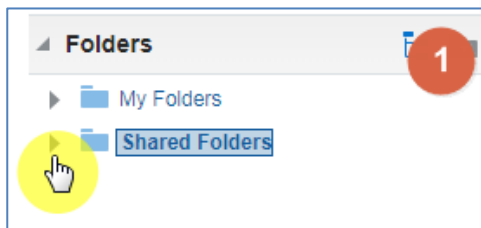
View folder content

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.

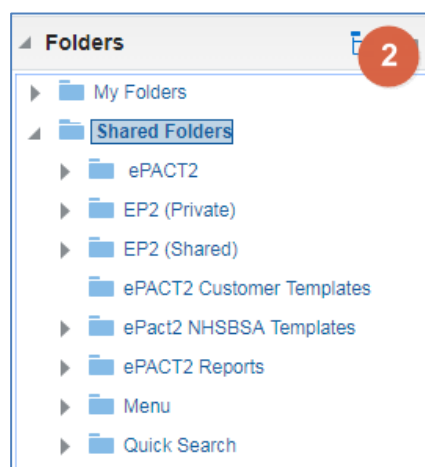


You can expand folders to view the content in two ways:

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

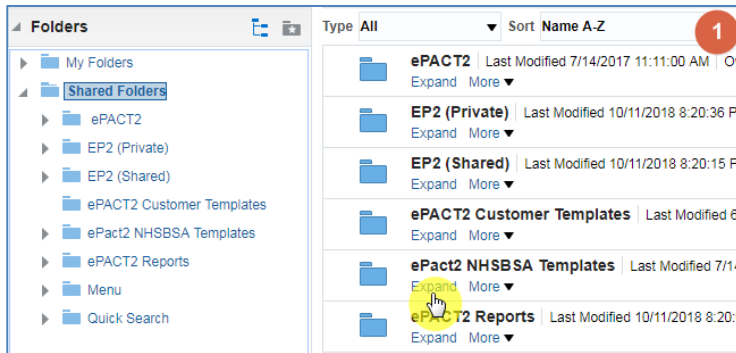


2. This will then display the sub folders available within that folder

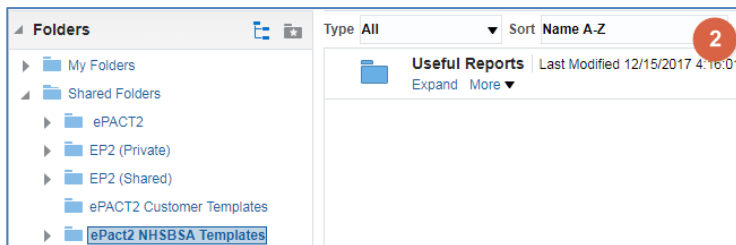


You can also open folders within the folder content pane:

1. Select 'Expand' beneath the folder you want to open



2. You will then be displayed with the folder contents:

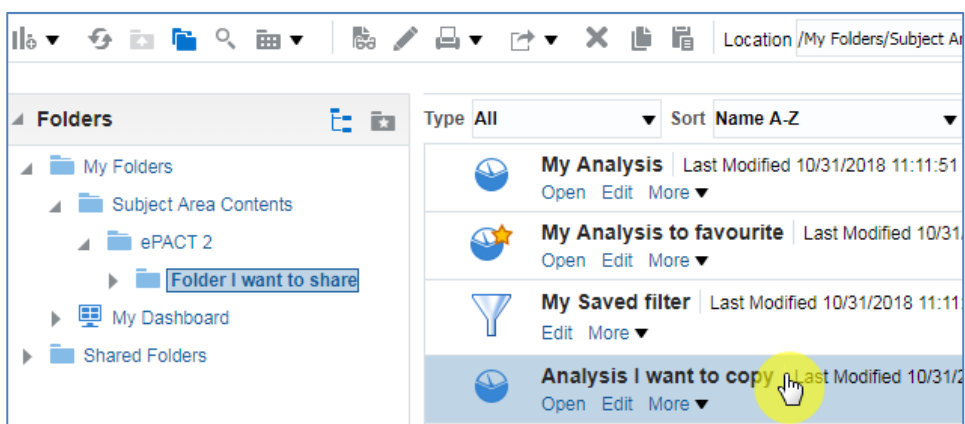


How to copy and paste content

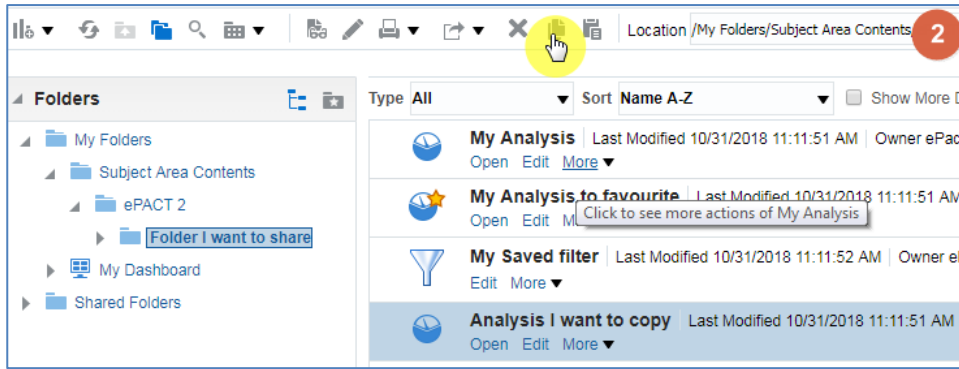
It is possible to copy content from any folder in the 'Catalog' and paste it within your own folder to save/ edit.

If you would like to copy any content, first locate the element you would like to copy, in this example I am copying an analysis, you will use the same function to copy any content, such as filter, save columns etc.

3. Highlight the content you want to copy by clicking on the content box:

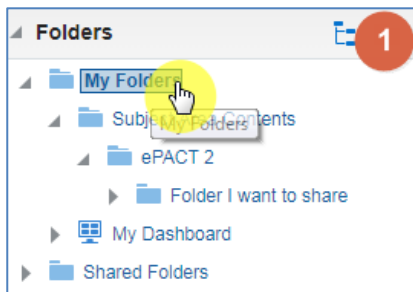


4. Select the copy icon from the 'Catalog' toolbar

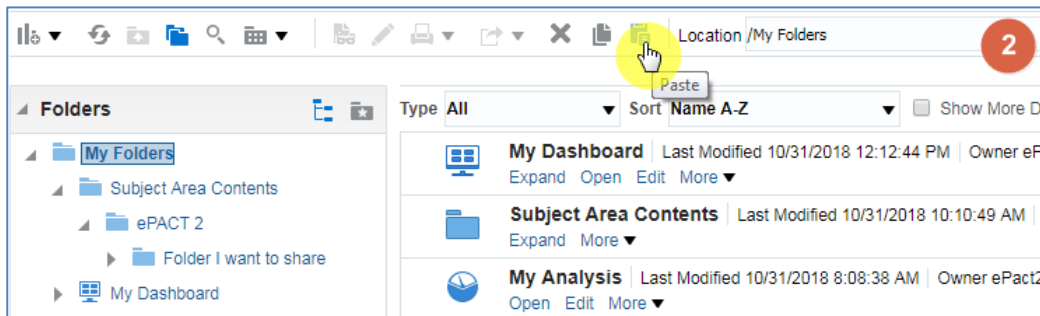


The analysis will now be copied, now locate the folder you want to paste the content into, in this example I am selecting 'My Folders'

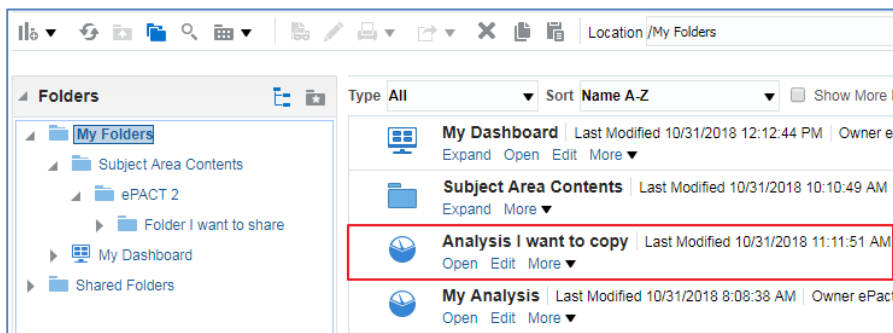
5. Select the folder you want to paste the copied content into



6. Select the paste icon from the 'Catalog' toolbar



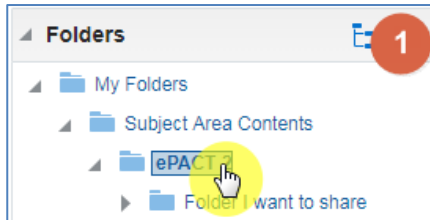
The pasted content will now appear in the folder you have selected:



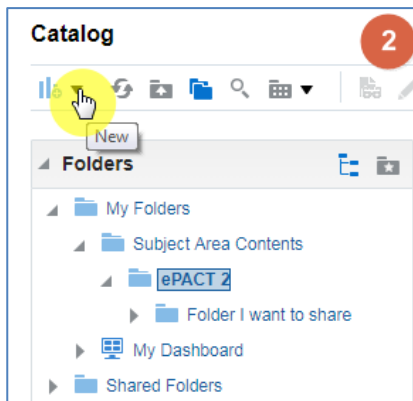
Create a new folder

To create a new folder first select the folder you want the folder to be created in, in this example I am choosing to create a new folder under the 'ePACT2' folder in 'My Folders':

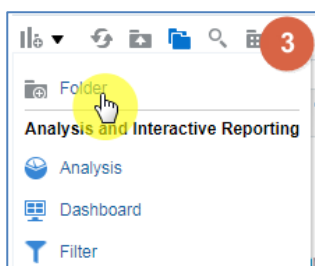
7. Select the location you want the new folder created in, click to highlight



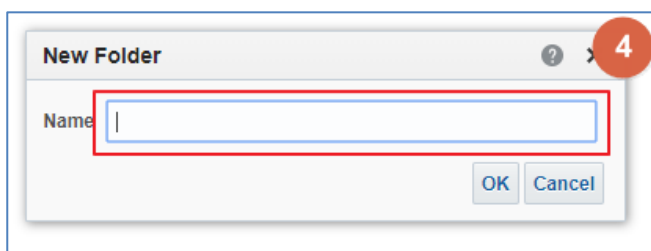
8. Using the 'Catalog' toolbar select the 'New' dropdown:



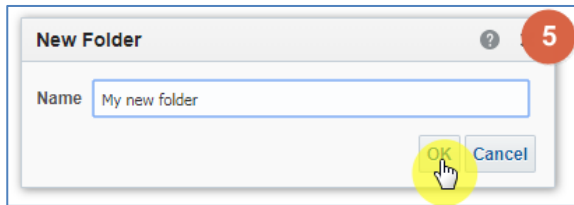
9. Select 'Folder'



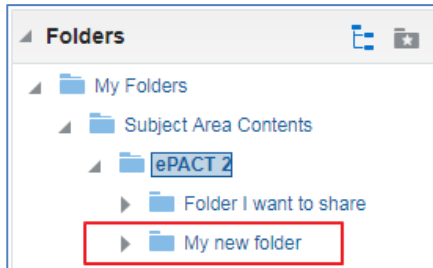
10. Give your new folder a name



11. Once named select 'OK'

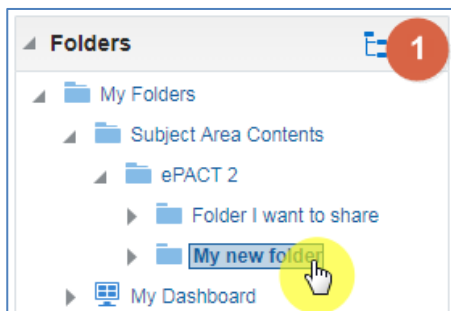


Your new folder will now be created:

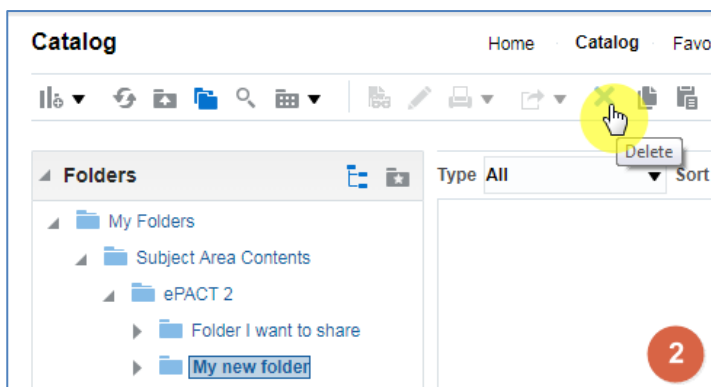


Delete folders/ folder content

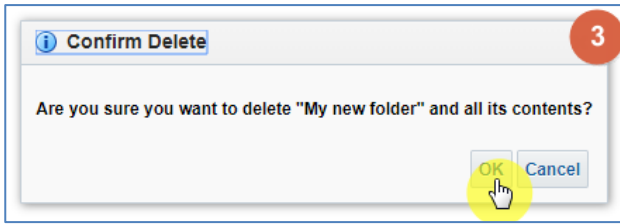
12. To delete a folder first select the folder you want to delete:




13. Using the 'Catalog' toolbar select 'Delete':



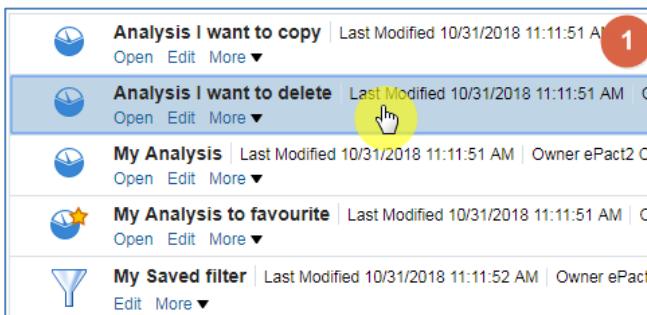
14. You will be prompted with the 'Confirm Delete' box, select 'OK' to action deletion:



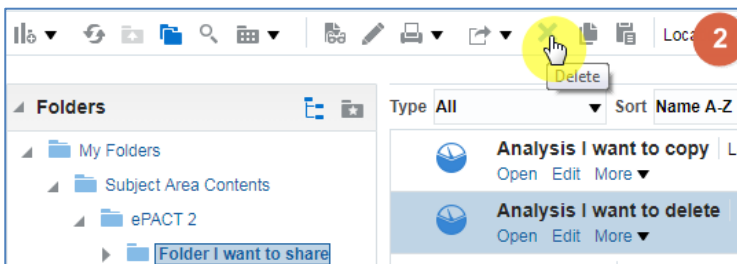
 Be aware, when you delete a folder all of the contents will be deleted. It is not possible to retrieve deleted content!

To delete content of the folder:

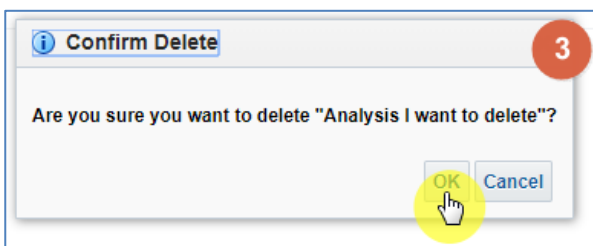
15. Select what you would like to delete:




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



17. Select OK to action deletion:



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

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](#)