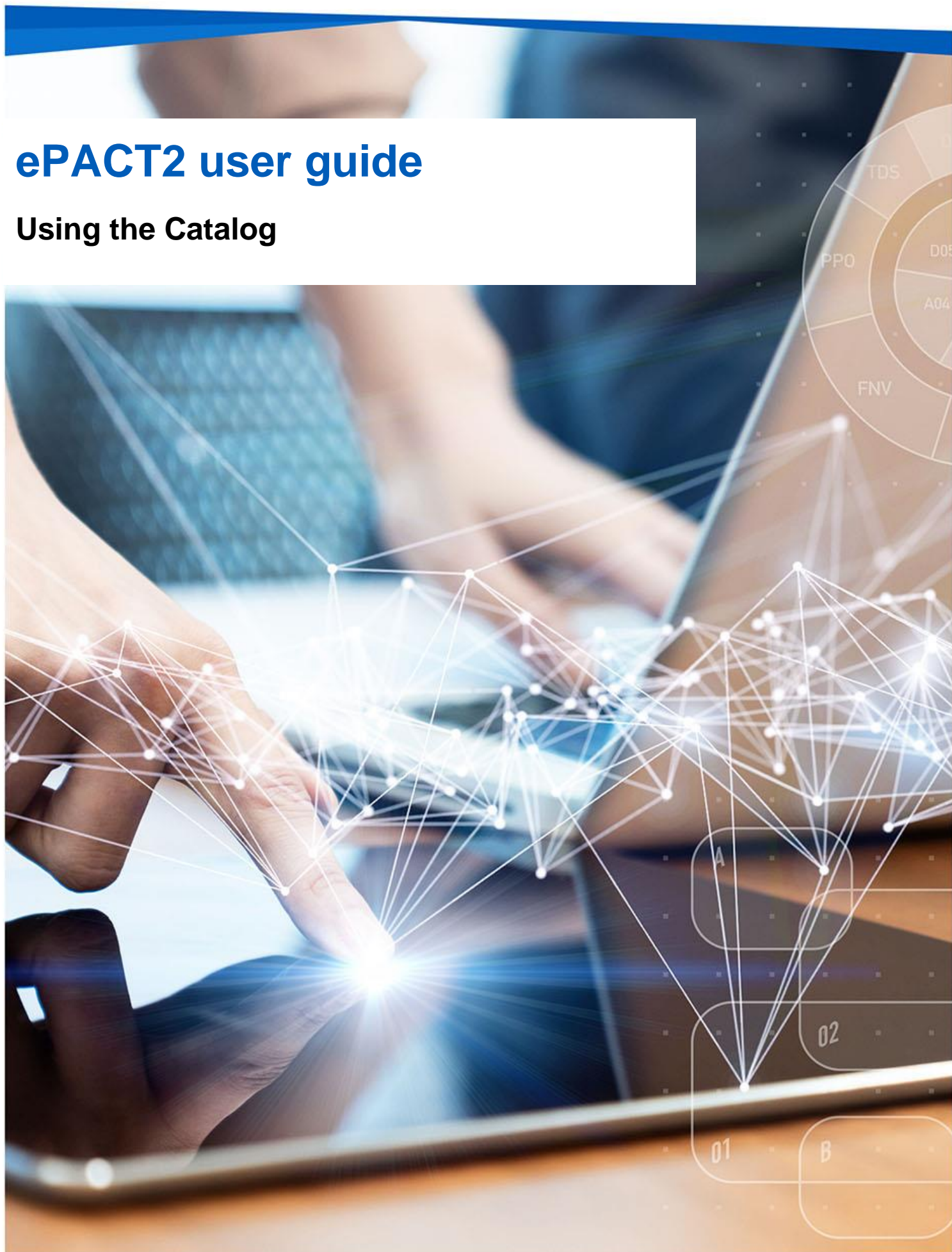# ePACT2 user guide

Using the Catalog

Interactive Contents

Use this interactive contents list to jump straight to the content you want to see. Just click the titles below to go directly to that section:

Contents

Getting Started
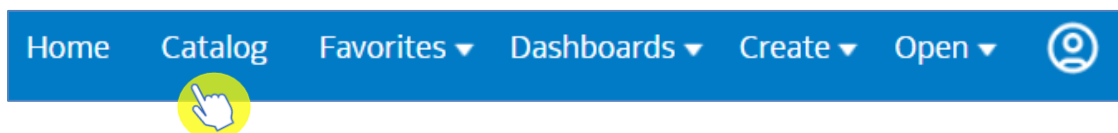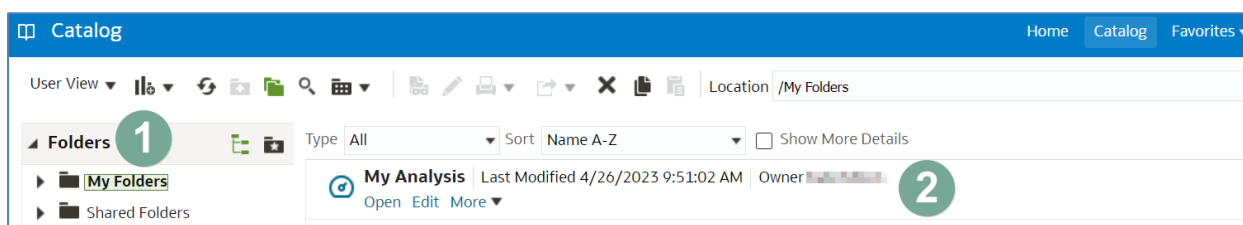
Getting more help

Getting Started

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 from the menu on the left, the middle pane will show the content of that folder

There are two folders within the 'Catalog':

1) My Folders

2) Shared Folders

My Folders

The 'My Folders' will contain all saved content for your account, this will include analysis, saved filters, saved groups and saved columns. The 'My Folders' 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 and can be found in the following folders:

- ePACT2

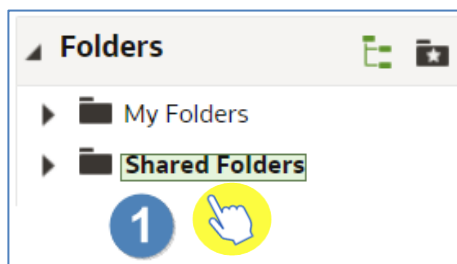- ePACT2 NHSBSA Templates

- 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.
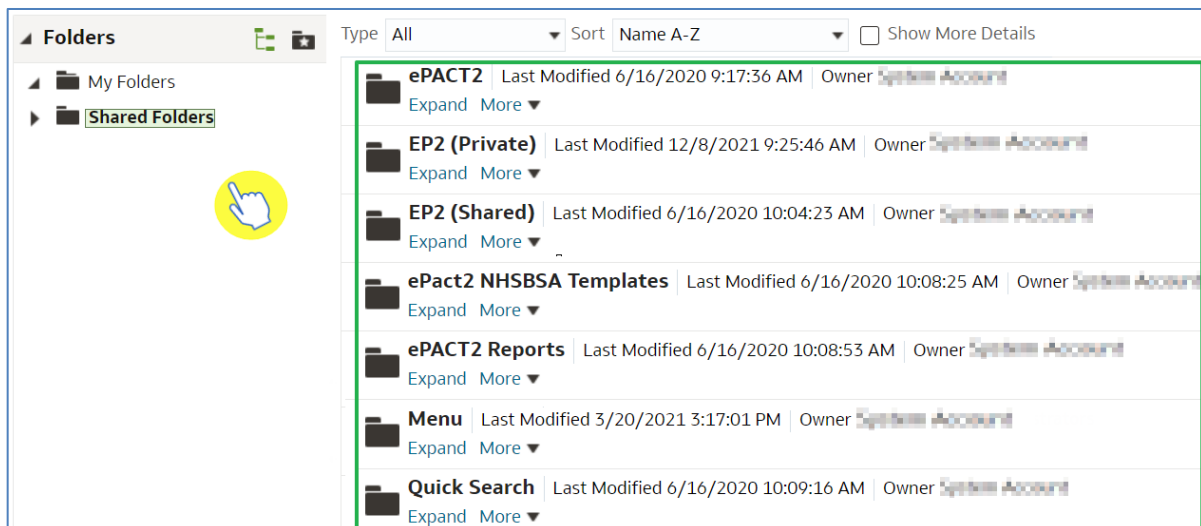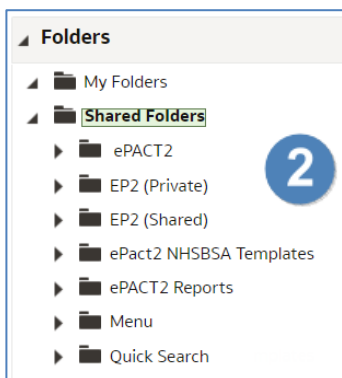

You can expand folders to view the content in two ways:

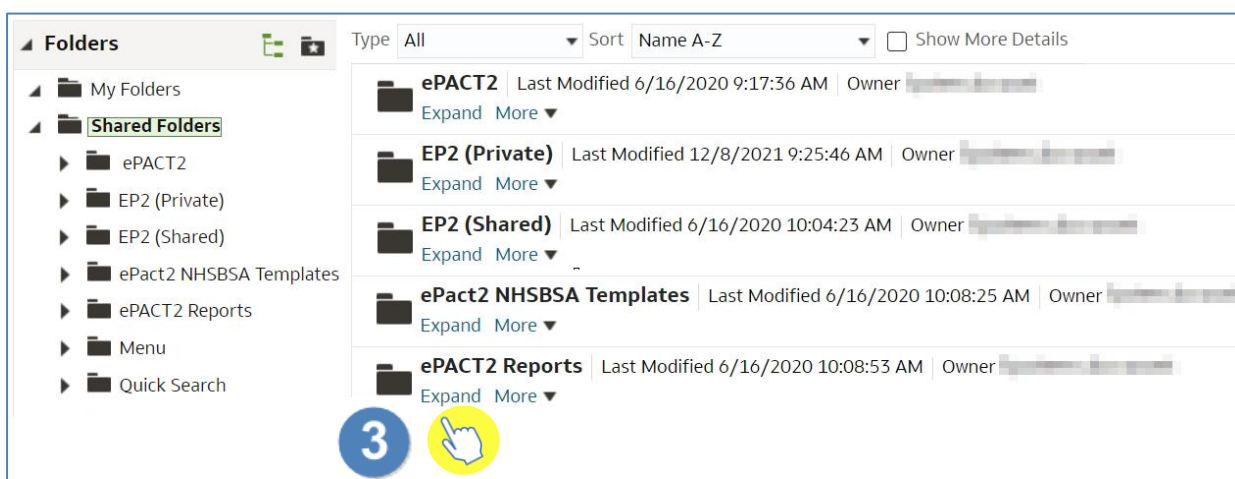1.   Select the drop-down arrow next to the folder title.

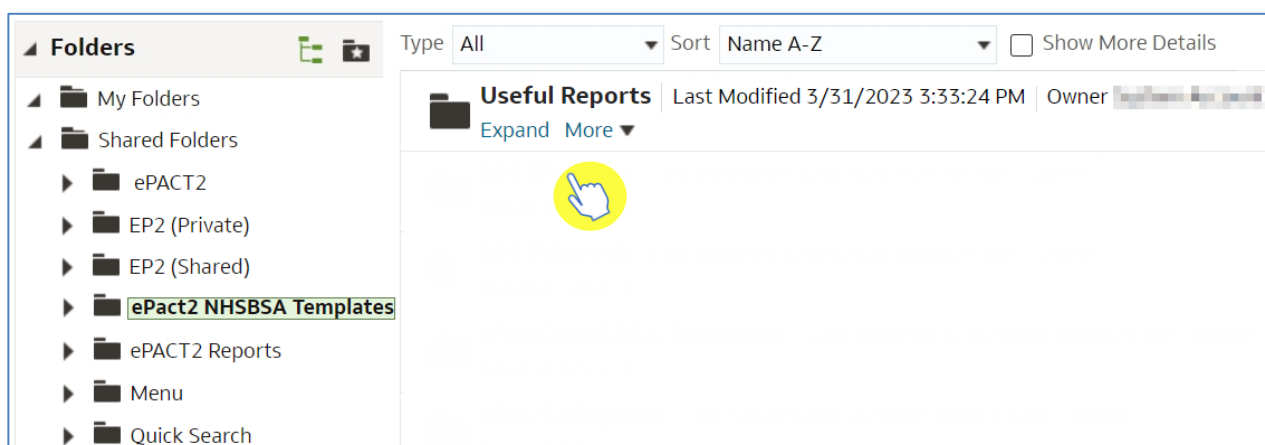2.   This will then display the sub folders available within that folder.

You can also open folders within the folder content pane:

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

4.   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 filters, save columns etc.

1.   Highlight the content you want to copy by clicking on the content box.
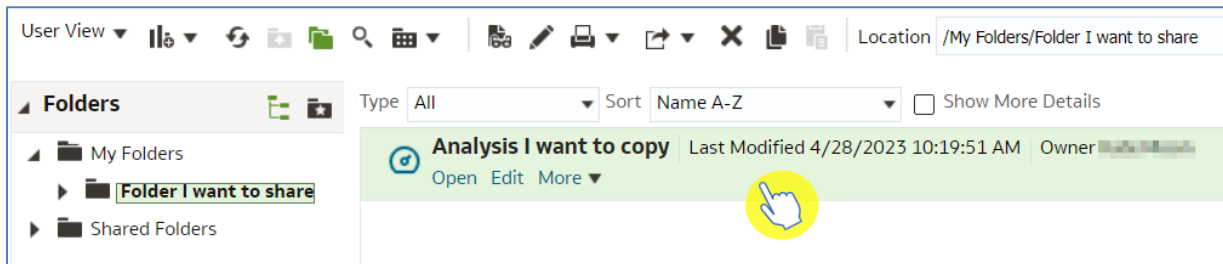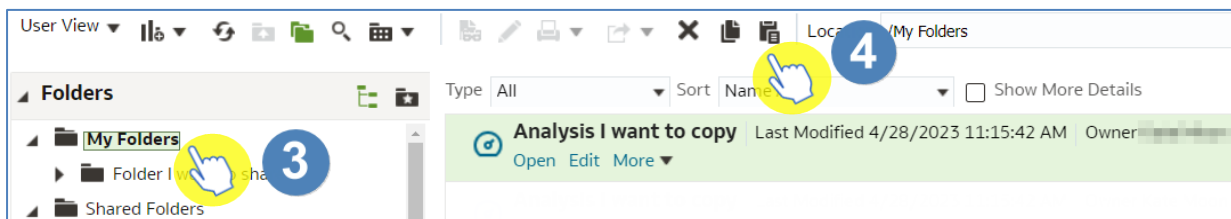
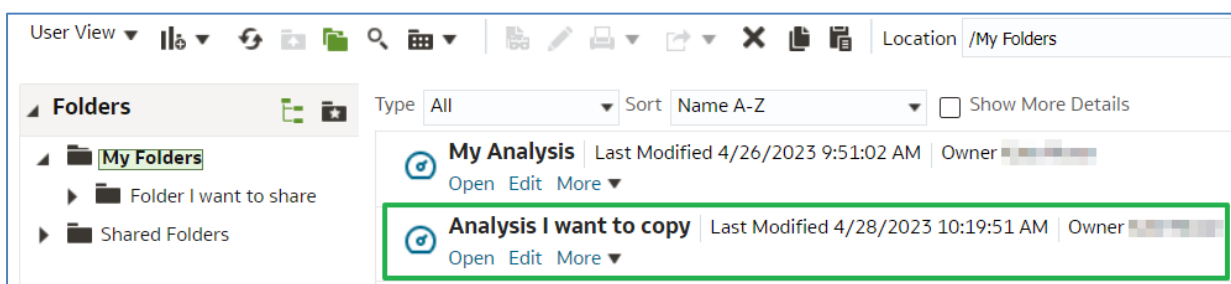2.   Select the copy icon from the 'Catalog' toolbar.
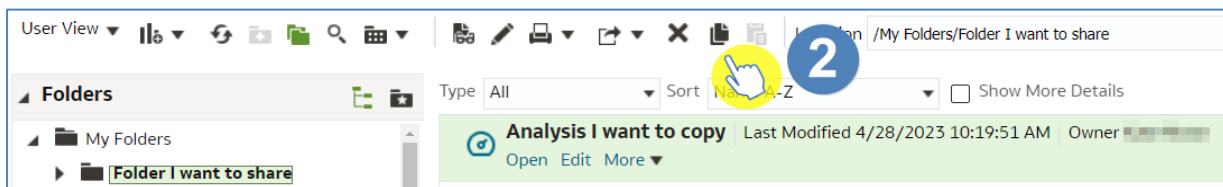
3.   Select the folder you want to paste the copied content into.

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

5.   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 'My Folders'.

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

2.   Using the 'Catalog' toolbar select the 'New' drop-down.
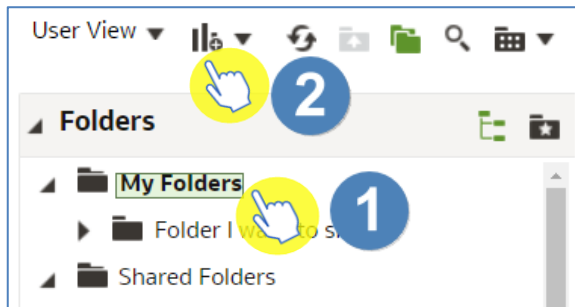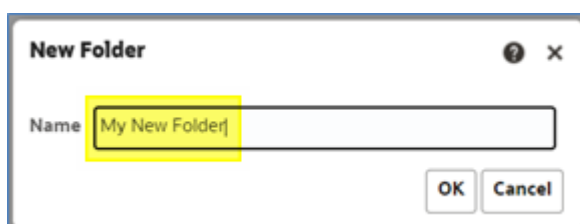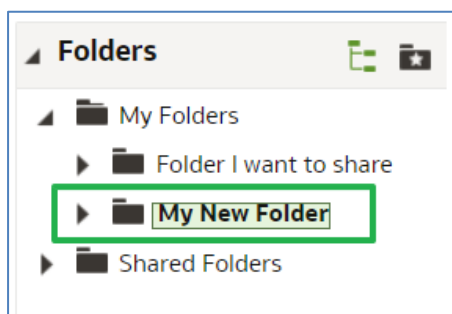

3.   Select 'Folder'.
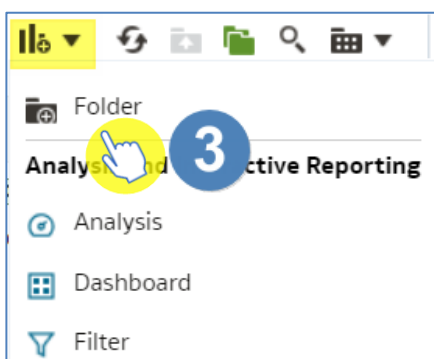
4.   Give your new folder a name.
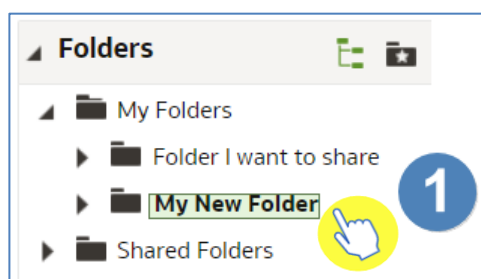

5.   Once named select 'OK'.

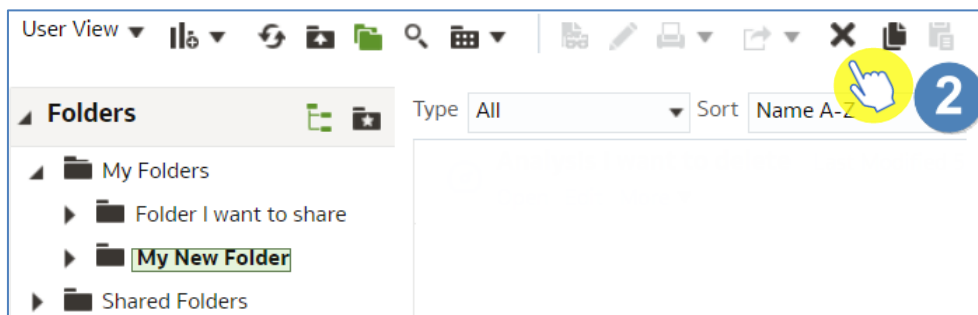6.   Your new folder will now be created:

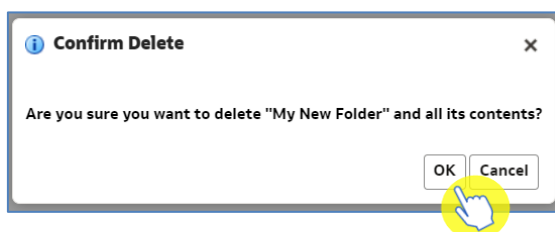# Delete folders

1.   To delete a folder first select the folder you want to delete.

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

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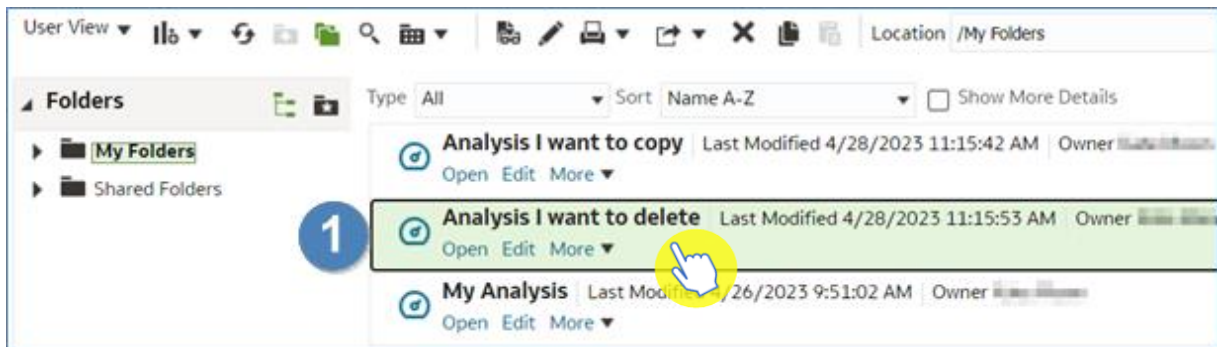

> ❗ Be aware, when you delete a folder all of the contents will be deleted. It is not possible to retrieve deleted content.
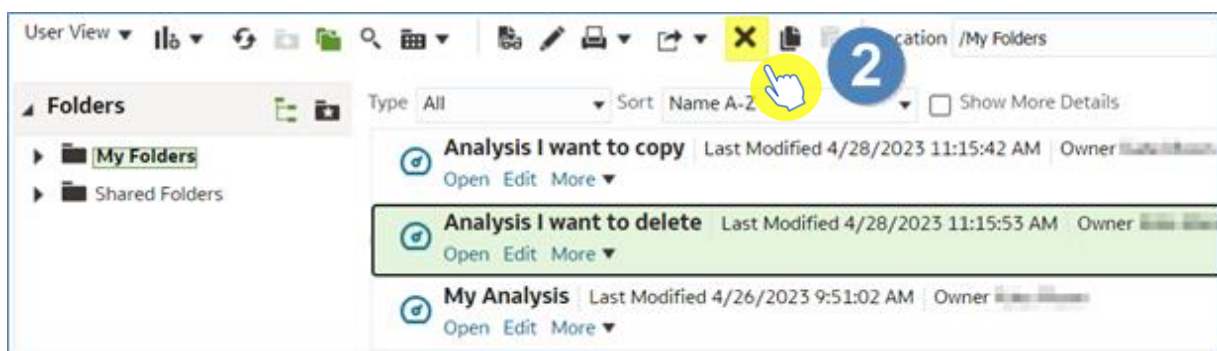
Delete folders content

To delete content of the folder:
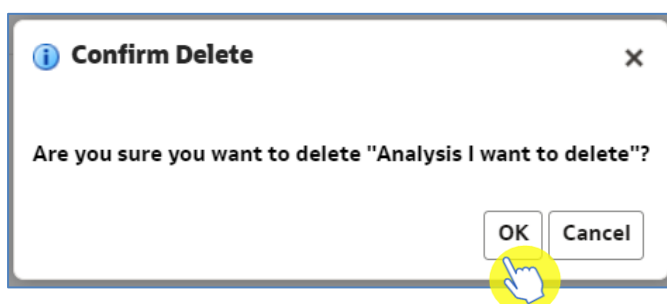
1.   Select what you would like to delete.

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

3.   Select OK to delete.

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

Getting more help

Additional training material and user guides

The ePACT2 training team has developed several how to guides to help you get the best out of ePACT2. These can be found on our ePACT2 user guides page

Webinar sessions

We offer a free webinar training service to all our users and you can book as many sessions as you need.

Our webinar sessions are booked as 1hour slots and we offer a number of different sessions covering a range of topics.

We also offer bespoke sessions which are delivered just to you or your invited colleagues. You can let us know if you have any specific topics or reports you'd like to cover or if you would prefer an introductory tour of the system.

Our experienced trainers deliver these sessions using MS Teams and you can take part wherever you are as long as you can get online.

You can find our more and book your webinar by going to our ePACT2 training page