# ePACT2 User Guide

# **Understanding Saved Filters**

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## **Creating and Saving Filters**

Saved filters are separate objects saved in the 'Catalogue' which can be reused against multiple analyses.

### **Creating a Saved Filter**

CT2 Home Catalog Favorites ▼ Dashboards	New ▼ Open ▼ Signed	In As ePact2 CCG Prescriber Level RX	inance ePact2 CCG Prescriber Level RXFinar
v	Analysis Analysis	;T2	
News Dashboards	Filter	Prescribing Reports	Quick Search
NEWS FEED	Published Reporting	ePA	CT2 LATEST DATA
10 October 2018 ► General notice The system will be unavailable on Sunday 14 October from 8am to 12	Con 🛃 Data Model		Prescription Data: Aug-18
20 September 2018  Prescribing Reports We have today released the Prescribing Monitoring Document.	Style Template		Remuneration Report: Aug-18
We have today released the Remuneration report into ePACT2.	Actionable Intelligence		
16 October 2018 ► PMD More information available PMD can be found here. Use this for a hyperlink Homepage.	3 Action		

- 1. From the 'Landing Page' select the 'New' drop down.
- 2. Select 'Filter' from the drop down list presented

vorites 🔻 🔹 Dashboards 💌 Nev	/ ▼ · Open ▼ · Signed In As ePact2 CCG	Prescriber Level R	RXFinance ePact2 CCG Prescriber Level RXF
Welco	ome to ePACT2		
	Select Subject Area	×	
Dashboards	Search	٩	Quick Search
	Prebuilt Comparators	_	
	Prebuilt Comparators Sim10	e	PACT2 LATEST DATA
	Version Control		Descelation Date: Aug 40
October from 8am to 12 noon	ePACT 2		Prescription Data: Aug-18
ng Document.	<u>b</u> 3		Remuneration Report: Aug-18
t into ePACT2.			

- 3. Select the 'ePACT2' subject area
- 4. The 'Saved Filter' pane will open



5. Expand the subject area to locate the column you wish to create the filter on and double click to select



The 'New Filter' pane will be displayed

New Filter	•		0 ×
Column	BNF Chapter plus Code	fx	
Operator	is equal to / is in		- 2
Value			<b>v</b> Q
	Select by BNF Chapter	er Code Code	
	Add More Options	Clear All	
Protect	Filter		
Conver	t this filter to SQL		
			OK Cancel

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:



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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	The left hand box displays all available values, you can select a value by clicking
values	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:

Avail	able			Q
Name	Starts 🔻			
	Search Match Case			
Gast	tro-Intestinal System (01) - 01			
Card	liovascular System (02) - 02			
Resp	piratory System (03) - 03			
Central Nervous System (04) - 04				
Infec	tions (05) - 05			
Endo	ocrine System (06) - 06 🛛 🖤 🤳			
Obst	etrics, Gynae+Urinary Tract Disorders (07)	- 07		
Malig	gnant Disease & Immunosuppression (08)	- 08		
	tion And Right (00) 00		*	

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
U	Selecting this icon will move all available values

 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 BNF Chemical Substance being in or equal to Central Nervous System (o4):



5. When you select OK the filter is then applied to the 'Saved Filter' pane



# Saving a Filter

Untitled	Home Catalog Favo	rites 🔻 💿 Dashboards 💌 💿 New 💌 💿 Open 👻 💿 Signed In As e Pact2 CCG Prescriber Level RXFinance ePact2 CCG Prescriber Level RXFinance 👻
Subject Areas  Repart 2	९ †↓ र छ छ	Saved Filter Create a filter for the current Subject Area. Click on a column from the Subject Area pane to add it to this filter. Select a saved filter to apply its convents to this new filter.
Time Period     Organisation		TBNF Chapter plus Code is equal to / is in Central Nervous System (04) - 04
Drug / Appliance     Attributes	e	

6. To save your filter you can select the 'Save or 'Save As' icon available in the top right hand corner of your saved filter pane

Save – saves the filter, overwriting any current version

Save as – will save the filter as a separate new filter

When you select save the system will then give you the option to:

- 7. Choose the folder you want your filter saved in
- 8. Name the filter, the default name will show as 'Untitled'

Folders	Ē: 🖬	Save In	
/My Fo	olders//ePACT 2	/My Folders/Subject Area Contents/ePACT 2 🔹 💼 🖬	•
2	1/ePACT 2		
		2	
		Name	
		Untitled	
	3	Desgription	
Save special obj	ects like Filters ar	d Members from quick access folders view to guarantee proper cata	alog placeme
			OK Cance
			Cance

### 9. Click 'Ok' to save the filter



10. A 'Saved' icon will momentarily appear next the 'Save' and 'Save As' icons

# Applying a Saved Filter to an Analysis

Once saved filters can then be added to an analysis when it's created

#### Within the analysis:

Untitled Home Cat	alog Favorites 🔻	Dashboards 👻 🔹 New 👻 🔹 Open 👻	Signed In As ePact2 CCG Press	criber Level RXFinance ePact2 CCG F	Prescriber Level RXFinance 🔻
Criteria Results Prompts Advanced					
⊿ Subject Areas 🔍 ↑↓ 🔻 ≫	<b>T</b> 22				
ePACT 2     Time Period	✓ Selected Column	15			۵ 🕺
<ul> <li>Organisation</li> </ul>	Time Period	HS England Prescribing Organisations	Drug / Appliance	Reporting Fields	
Drug / Appliance     Reporting Fields	Year Month 🏟	HS Commissioner / Provider plus Code 🏠	BNF Chapter plus Code 🏟	Items 🏟 🚦 Actual Cost 🏟	
Patient					
	∡ Filters				₹ × ≫
	Year Month is e	equal to / is in 201808 ner / Provider plus Code is equal to / is in AIRED,	ALE, WHARFEDALE AND CRAVEN	N CCG (02N00)	
🔺 Catalog 🛛 🔶 🐘 💉 😏					
List All 💌					
My Folders					
PACT 2					
T Untitled					
Shared Folderation					

- 1. Expand the folder containing the saved filter
- 2. Double click on the saved filter

The 'Apply Saved Filter' pane will be displayed

Apply Saved Filter
Filter Location and Contents Filter Location /My Folders/Subject Area Contents/Untitled Contents of Filter T BNF Chapter plus Code is equal to / is in 04 Filter Options Choose one or more of the following option Clear all existing filters before applying Apply contents of filter instead of a reference to the filter
OK Cancel

- 1. Displays the location the filter is saved to, when leaving the 'Apply contents of filter instead of a reference to the filter' un ticked the analysis will reference back to this location
- 2. Displays the contents of the filter, when you create a filter using name, the system automatically converts to the code
- 3. If you tick this box it will remove any filters you have previously applied to your analysis
- 4. If you tick this box it will take the contents of the filter and apply this to your analysis. This will mean if you alter or delete the filter in the future this analysis will not be affected.

If you leave the box un-ticked, your analysis will reference back to where the filter is saved. This means that if you update the filter in the future this analysis will automatically update with the changes.

#### 3. Select 'Ok' to apply the filter



4. The 'Saved Filter' will be added to the filter pane

Criteria Results Prompts Advanced					1 12	e	)
⊿ Subject Areas 🔍 †↓ 💌 ≫	<b>T F</b> XVZ						
ePACT 2     ime Period	✓ Selected Column	Columns  (I) X  (I) X					
Organisation	Time Period	HS England Prescribing Organisations	Drug / Appliance	Reporting Fields			
Drug / Appliance      Beneritien Fields	Year Month 🔅	HS Commissioner / Provider plus Code 🔅	BNF Chapter plus Code 🏟	🚦 Items 🏟 🚦 Actual Cost 🏟			
Patient							
	∡ Filters				, ×	»	
🔺 Catalog 🛛 🔿 隐 🦯 分	Year Month is a AND HS Commission AND HS Commission AND Untitled	equal to / is in 201808 oner / Provider plus Code is equal to / is in AIRED/	ALE, WHARFEDALE AND CRAVE	N CCG (02N00)			

### **Editing a Saved Filter**

Once created a 'Saved Filter' can be edited to include different information.

To edit a 'Saved Filter':

1. Select the 'Catalog' icon

NH Business Services Author	ity Insight		Search All	I <b>v</b>	Q Advanced	Help 🔻 Sign Out 💴					
ePACT2	Home Catalog Favorites V	Dashboards 👻 🔹 New 👻 🔹 Op	een ▼ Signed In As ePac	ct2 CCG Prescriber Level RXFi	nance ePact2 CCG Presci	iber Level RXFinance 🔻					
Welcome to ePACT2											
News	News Dashboards		ial Reports	Prescribing Reports	Quick	Search					

- 2. Expand the 'My Folders' and select the folder containing the filter
- 3. The 'Saved Filter' will be displayed, select 'Edit'



4. The 'Saved Filter' pane will be displayed, any changes required can now be made



## **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: <u>Additional User Guides</u>

#### WebEx sessions

WebEx will be provided on a number of different topics and features. More information about these can be found here: <u>WebEx Training</u>