# ePACT2 User Guide

# Hierarchy Columns and Selection Steps

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## **Hierarchy Columns**

There are numerous 'Hierarchy' columns within ePACT2; the columns are indicated with the hierarchy symbol see below example:



'Hierarchy' columns can be used in conjunction with selection steps within your analysis results to display different levels of data within the same report.

The benefit of using 'Hierarchy' columns is that this allows you to navigate down to lower levels of data within the same analysis. Normal columns do not allow you to do this.



Results will return slower for analysis containing selection steps

## **Selection Steps**

### Using Selection Steps to limit the data displayed

When you have used a 'Hierarchy column' within your analysis 'Selection Steps' can be used to limit the data to only the organisation/BNF level required. The results can then be expanded to show data at multiple levels.

1. Set up your analysis with the required columns of data and the required hierarch column, then navigate to the results pane via the 'Results' tab

Criteria Results Prompts	Advanced		1
⊿ Subjec ୍ ≫	<b>T <i>f</i>.<sup>2</sup> IX2</b>		
<ul> <li>PACT 2</li> <li>Time Period</li> </ul>	✓ Selected Columns		
Organisation	HS England Prescribing Organisations	Drug / Appliance	Reporting Fields
Drug / Appliance	🕨 🖫 Prescribing Organisation 🔅	BNF Chapter plus Code 🔅	Items 🏟 🚦 Actual Cost 🏟
Reporting Fields     Teatient	Filters     Year Month is equal to / is in 2018     AND BNF Chapter plus Code is equal to	108 2 / is in Infections (05)	



In this example I am running the data for August 2018 and Chapter 5 returning data for Items and Actual Cost

2. Click the arrow to expand the 'Selection Steps' pane.

Untitled	Home Catalog Favorites 🔻	Dashbo	ards 🔻 🛛 🔁
Criteria Results Prompts	Advanced		
⊿ Subjec ् »		• 18 R	
ePACT 2     Email: Time Period	Title		[A] 💉 🗙
Organisation     Drug / Appliance	Pivot Table	[ <u>A</u> ]	322 🖋 🗙
<ul> <li>Reporting Fields</li> <li>Patient</li> </ul>	Prescribing Organisation         BNF Chapter plus Code           Prescribing Organisation         Infections (05)	Items 3,192,085	Actual Cost 15,305,157.86
<ul> <li>▲ Catalog → Ba ≫</li> </ul>			
List All			
My I olders     Shared Folders			
⊿ Vi ⇒ II₀ • ≫			
A Tille			
R Pivot Table	Selection Steps		

The default 'Selection Steps' for the Organisation hierarchical column or BNF hierarchical column will be displayed.

3. Hover the curser over 'Start with all members' to bring up the 'pencil' icon, select this icon to allow you to edit the field.

✓ Selection Steps
List: ALL 🗸
Measures
Reporting Fields - Items
Reporting Fields - Actual Cost
HS England Prescribing Organisations - Prescribing Organisation
I. Start with all members
↓ 2. Then, New Step
Drug / Appliance - BNF Chapter plus Code
<ul> <li>I. Start with all members</li> </ul>
↓ 2. Then, New Step

4. You will now be prompted with the 'Edit Member Step' pane, ensure the 'Action' is set to 'Start with selected members'



5. Select the search icon to expand the search pane



6. Search for the required overall organisation or BNF

Available			Q,
Name Starts	•	newcastle	
Children of	Root	•	τ.
At Level	Commis	sioner / Provider Level	,
		Search Match C	Case



7. Highlight the organisation or BNF required in the search results

⊿ H	S England Prescribing Organisations.Pres
►	NEWCASTLE CITY COUNCIL (10700)
►	NEWCASTLE GATESHEAD CCG (13T00)
►	NOCASTLE NORTH AND EAST CCG (00G00) (C 01-
►	NEWCASTLE WEST CCG (00H00) (C 01-APR-15)
►	NEWCASTLE (5D700) (C 01-JAN-14)

8. Use the single arrow icon to select the organisation or BNF

⊿ H	S England Prescribing Organisations.Prescribing C	
►	NEWCASTLE CITY COUNCIL (10700)	S.
►	NEWCASTLE GATESHEAD CCG (13T00)	
►	NEWCASTLE NORTH AND EAST CCG (00G00) (C 01-	8

9. The organisation or BNF will be displayed in the 'Selected' section



10. Click 'Ok'



The total figure will now display the organisation selected

	in chapter plus code	nems	Actual Cost
▶ NEWCASTLE GATESHEAD CCG (13T00) Infe	fections (05)	29,276	167,177.99

Vivot Table						
BNF Chapter plus Code	Prescribing Organisation	Items	Actual Cost			
Infections (05)	NEWCASTLE GATESHEAD CCG (13T00)	29,276	167,177.99			
Infections (05)	▶ 108 RAWLING ROAD(RAWLING ROAD PRACTICE) (A85609)	65	306.60			
Infections (05)	AVENUE MEDICAL PRACTICE (A86007)	84	409.13			
Infections (05)	BEACON VIEW MEDICAL CENTRE (A85026)	292	1,044.04			
Infections (05)	BENFIELD PARK MEDICAL GROUP (A86023)	701	4,931.36			
Infections (05)	BENSHAM FAMILY PRACTICE (A85002)	212	659.08			
Infections (05)	BETTS AVENUE MEDICAL GROUP (A86030)	541	2,582.12			
Infections (05)	BEWICK ROAD SURGERY (A85017)	289	1,525.35			
Infections (05)	BIDDLESTONE HEALTH GROUP (A86010)	459	2,340.60			

#### 11. Select the 'arrow' icon to expand the organisation

## Including total for groups of organisations/BNF

Selection Steps can also be used to include totals figures for groups of organisations or multiple BNF selections.

1. From the results pane select the arrow to expand the 'Selection Steps'



2. Select the 'Then, New Step' link to add a further step



3. From the drop down list select 'Add Groups or Calculated Items



4. From the drop down list select 'New Group'



5. You will now be presented with the 'New Group' pane, select the search icon to expand the search pane



6. Search for the required organisation or BNF



7. Highlight the organisations or BNF required in the search results.
(Organisations or BNF's can be expanded within the search results) once selected use the arrow key to move the organisations/ BNF to selected

Name	Starts		•	newcast	le gates			Ľ
	Child	iren of	Root			•	- 5	
	A	t Level	Commis	sioner / P	rovider Lev	el ,	•	
					Search	Match	Case	
⊿ Er	ngland	Presc	ribing (	Organisa	tions.Pre	scribing	) Orga	2
	• NE	NCAST	LE GATE	SHEAD C	CG (13T00	)		J.
	• • [	108 RA	WLING R		NLING RO	AD PRAC	1	
	•	AVENU	EMEDIC	AL PRAC	TICE (A860	07)		<
	• • [	BEACO	N VIEW	MEDICAL	CENTRE	(A85026)		~
	•	BENFIE	LD PARK	MEDICA	L GROUP	(A86023)		
	▶ ● ▶ ●[	BENFIE BENSH	LD PARK	( MEDICA	L GROUP	(A86023) <b>002)</b>		
	<ul> <li>●</li> <li>●</li> <li>●</li> <li>●</li> <li>●</li> <li>●</li> </ul>	BENFIE BENSH BETTS	ld Park Am Fam Avenue	MEDICA	L GROUP	(A86023) 002) (A86030)		

The organisations will be displayed in the 'Selected' section



#### 8. Enter and appropriate name in the 'Display Label' section

New Group						
Display Label	Practio	e Group	1			
Values From	Englar	nd Prescr	ibing Organi	sations.Prescribing Organ	nisation	n
Available				ৎ		Selected
Name Starts		•	newcastle	pates		108 RAWLING ROAD(RAWLING ROAD PRACTICE) (A85)
						<ul> <li>BEACON VIEW MEDICAL CENTRE (A85026)</li> </ul>
Childre	en of	Root		▼ <sup>1</sup>		BENSHAM FAMILY PRACTICE (A85002)
At L	.evel	Commis	sioner / Prov	ider Level 🔹		BEWICK ROAD SURGERY (A85017)
			:	Search 🗌 Match Case		BETTS AVENUE MEDICAL GROUP (A86030)
England B		ribina C	reanicatio	na Bracaribing Org		BRUNTON PARK (A86033)
	resci		rganisau	ons.Prescribing Orga	>	<ul> <li>BROADWAY MEDICAL CENTRE (A86035)</li> </ul>

#### 9. Click 'Ok'



10. The group created will now be displayed in the selection steps pane



11. The group created will now be displayed in the results

Pivot Table 🛛 🔤 🖉 🚹						
Prescribing Organisation	BNF Chapter plus Code	Items	Actual Cost			
▶ NEWCA STLE GATE SHEAD CCG (13T00)	Infections (05)	29,276	167,177.99			
Practice Group 1	Infections (05)	2,663	15,816.64			

12. The steps above can then be repeated to include all groupings required.

### Saving Groups for use in future analysis

Once created groups can be saved and then reused in future analyses.

1. Click the link for the group



2. Select 'Save Group As' from the drop down list



- 3. Select an appropriate folder to save the group in
- 4. Enter an appropriate name for the group
- 5. Click 'Ok'

Save As			0	×
Folders	Ē: 🖬	Save In		
My Start (JePACT 2 , ePACT2//ePACT 2 				
./Quick	Search//ePACT	Name 4		
		Description		
	•			
Save special obje	ects like Filters an		Canc	ent.

## **Re-using Saved Groups**

It is possible to use saved groups in other analysis, enabling you to create the group once and use in multiple reports.



You can only use a saved group for the column it has been created and saved under. i.e. you can only use a group of practices you have created in the 'England Prescribing Organisation' column, in this column on other analysis

1. Select the 'Then, New Step' link to add a further step



2. From the drop down list select 'Add Groups or Calculated Items'



3. From the drop down list select 'Select Existing Groups and Calculated Items'



4. Select the group from the saved location



5. Use the arrow icon to select the group



6. The group selected will be displayed in the 'Selected' section



7. Click 'Ok'



The new group added will now be displayed in the selection steps pane, and your results pane.

## **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>