NHS
Business Services Authority

ePACT2 User Guide

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

Contents

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-dashboardsspecifications

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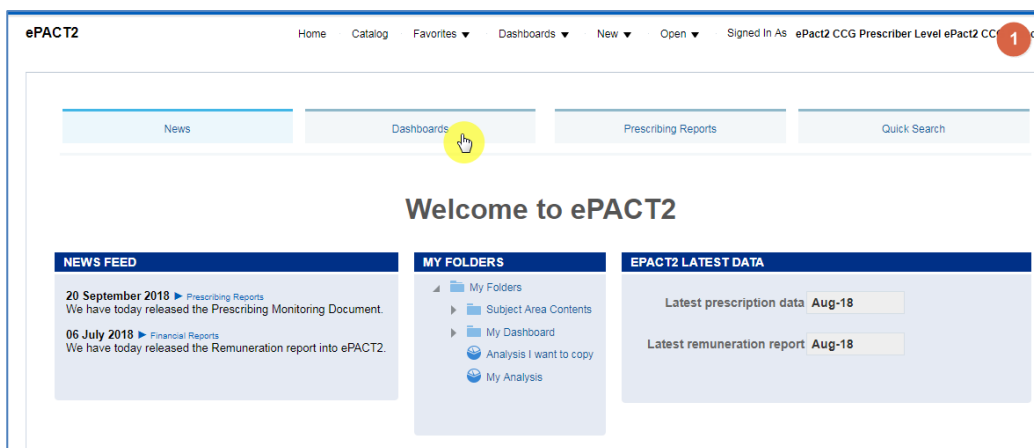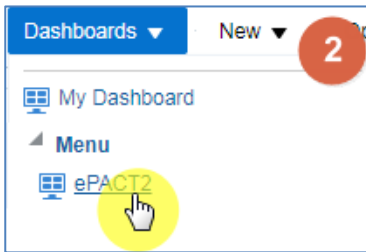

You will then navigate to the dashboard page which will display all available dashboards, from here select the blue link for the dashboards you wish to view.

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
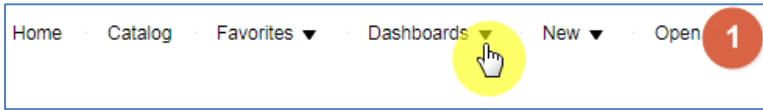
2. From the available list select 'ePACT2'

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

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
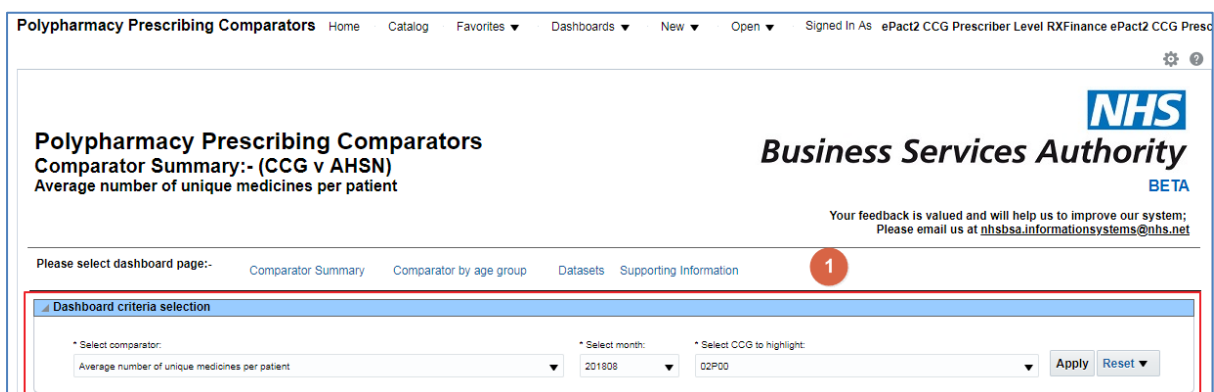

3.   Select the link for the area of the dashboard required.

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.
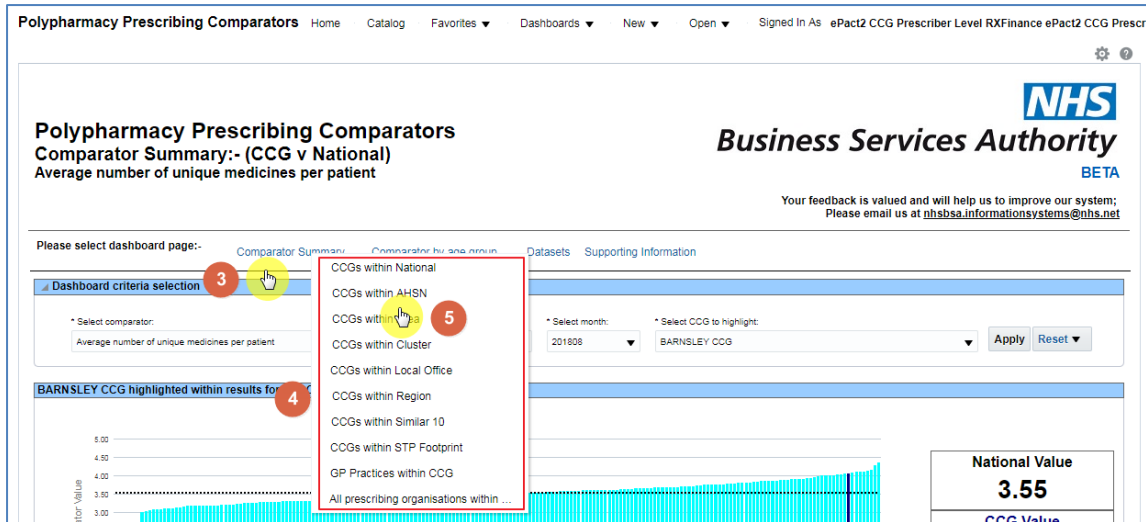
6. The dashboard will regenerate to the page selected.
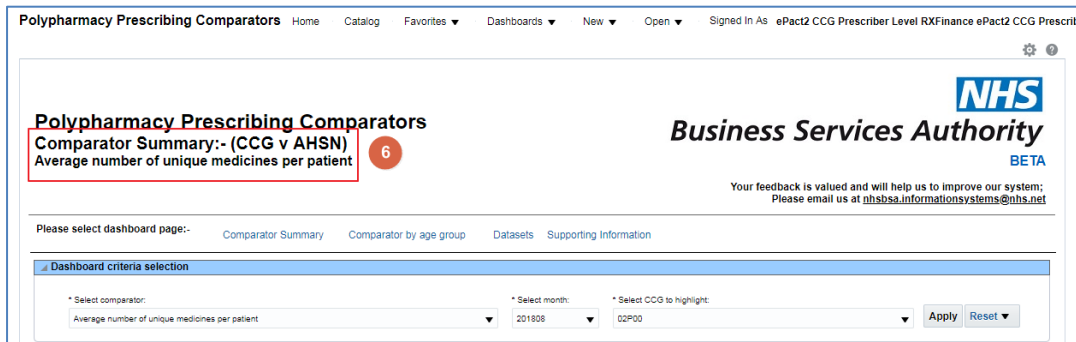
Dashboard Criteria Selection

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.
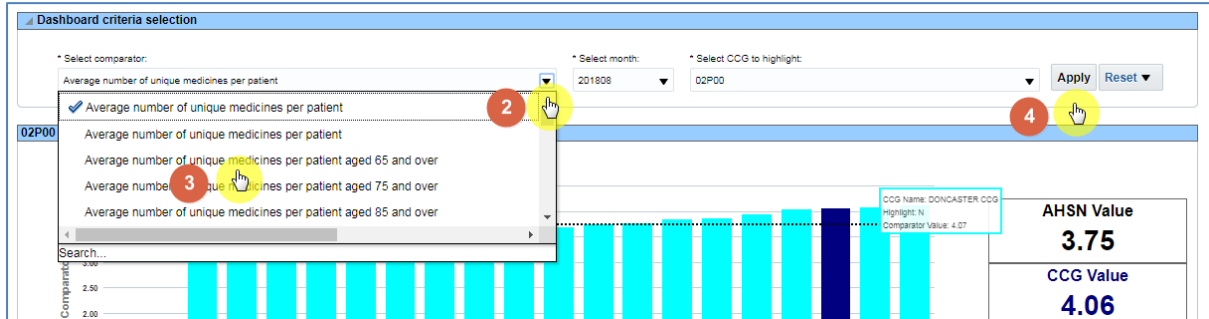

2.   Select the drop down arrow to the right of the criteria.

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.
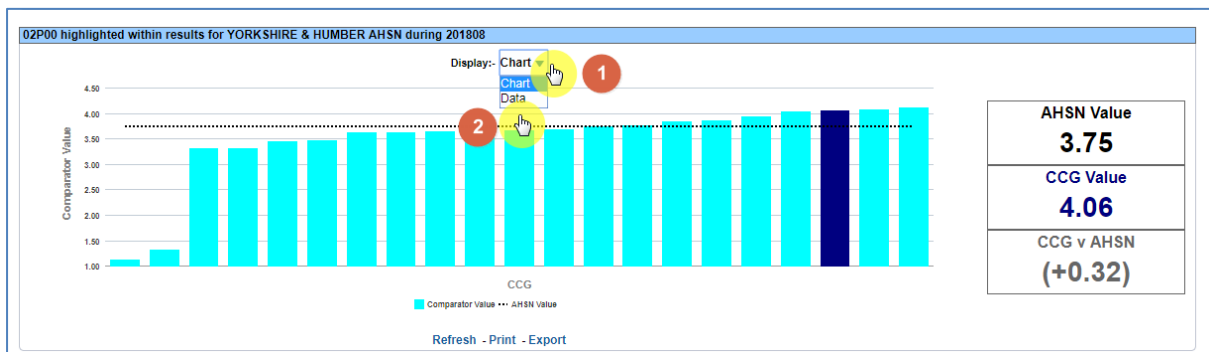
1.   Select the drop down option for the 'Display'.

2.   The views available will be displayed – usually Chart and Data

Exporting and Printing the Data

Exporting Dashboard Page

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'

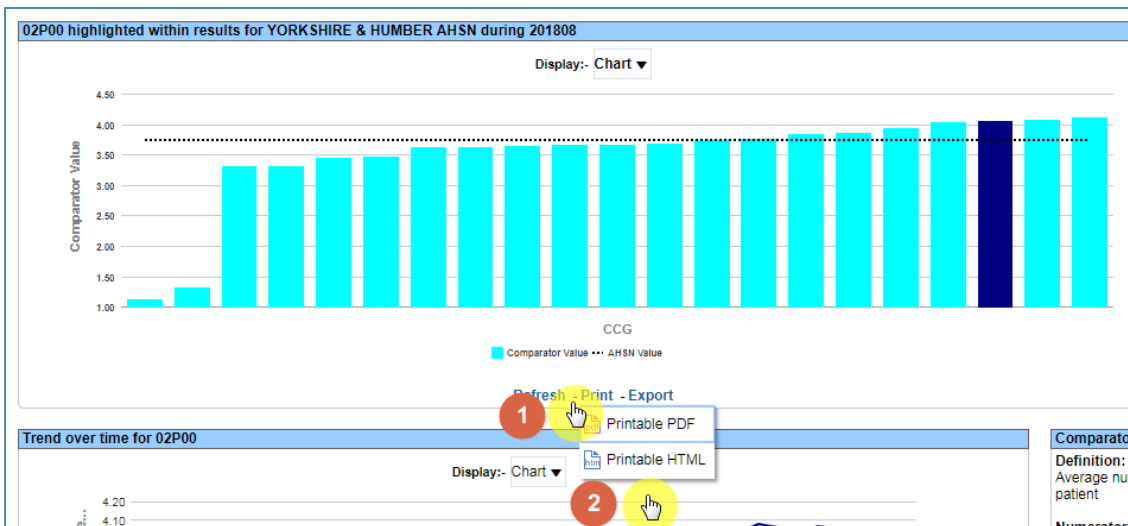## Exporting Individual Reports
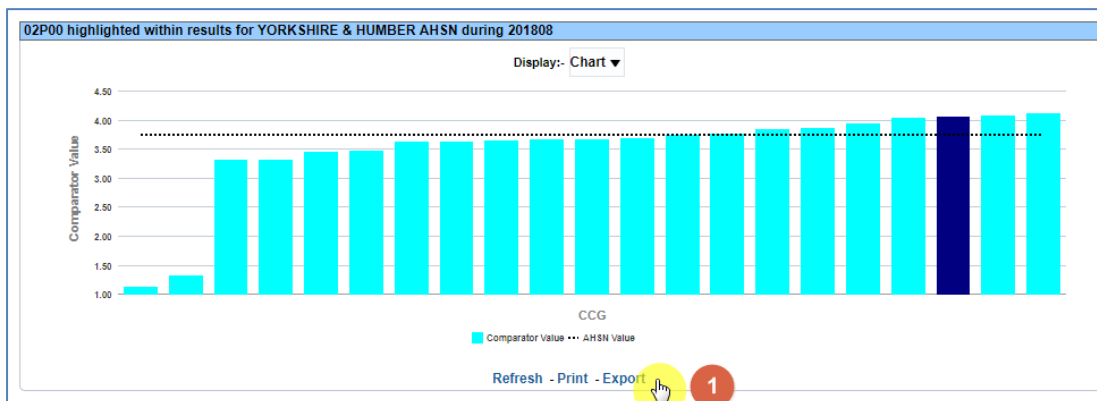
1.   Select the 'Export' option below the report required.
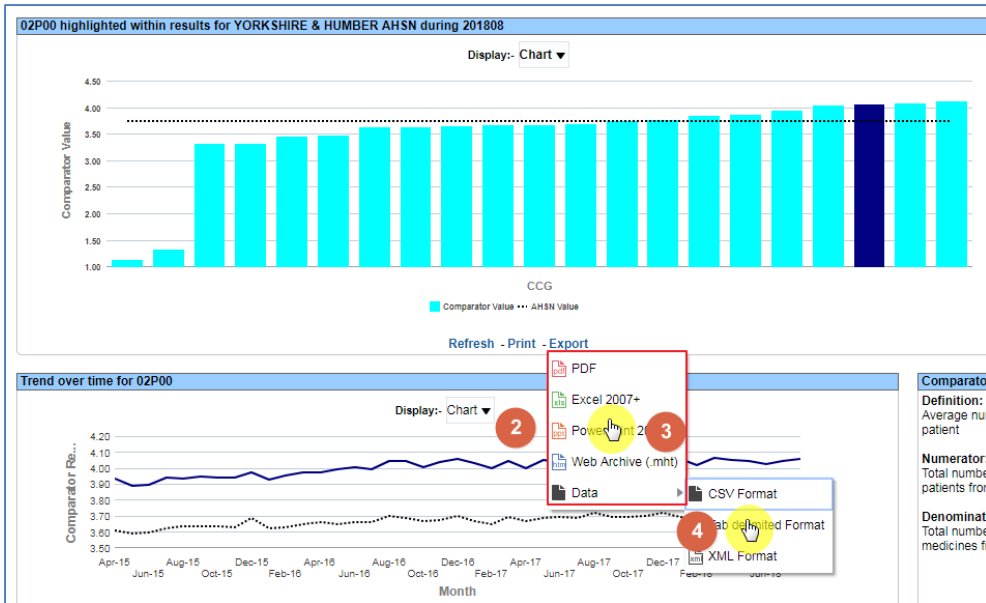
2. A drop down list with the formats available to export in will be displayed

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

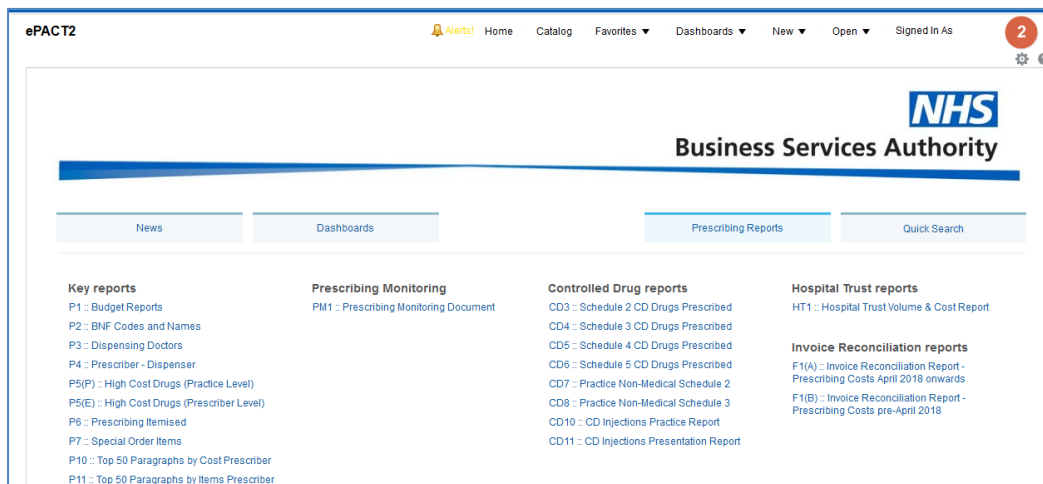2. Select the format required from the drop down list presented

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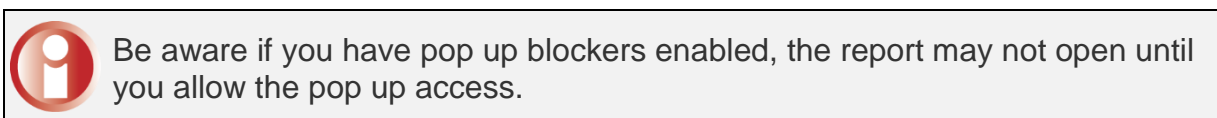
1.   To access 'Prescribing Reports' from the Landing page select 'Prescribing Reports'
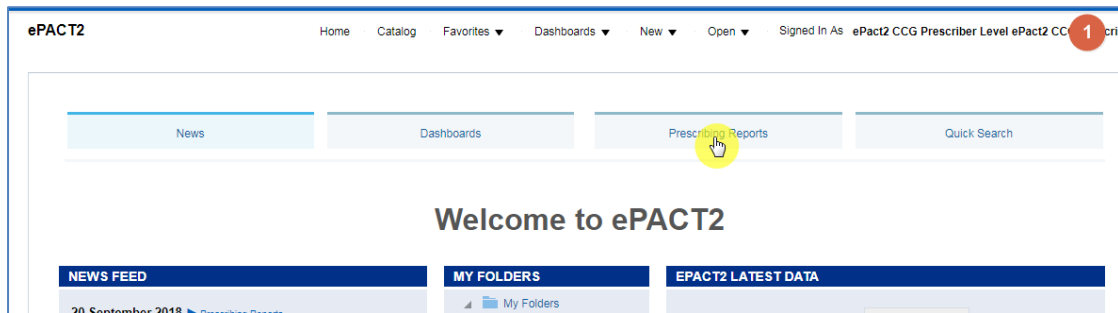
2.   You will then be taken to the 'Prescribing Reports' section, all reports are accessed by selecting the blue link for the report you wish to view:

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

> Be aware if you have pop up blockers enabled, the report may not open until you allow the pop up access.

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:

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:
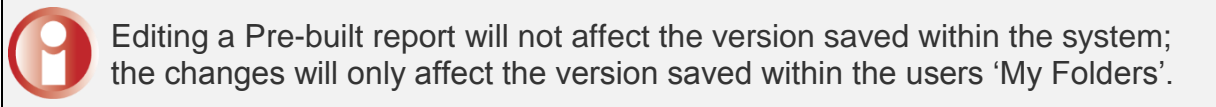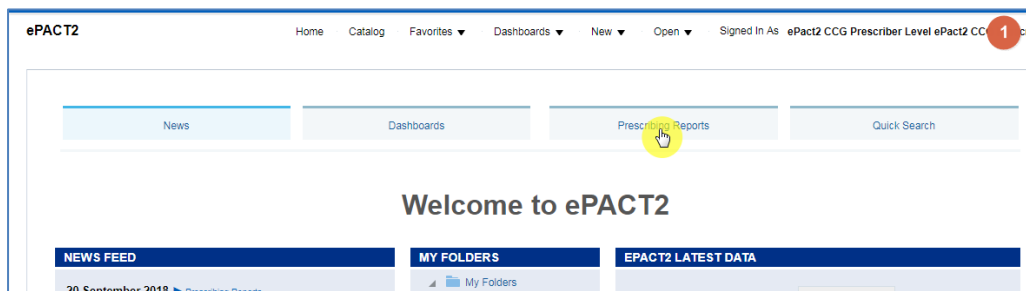
Editing a Pre-built Report

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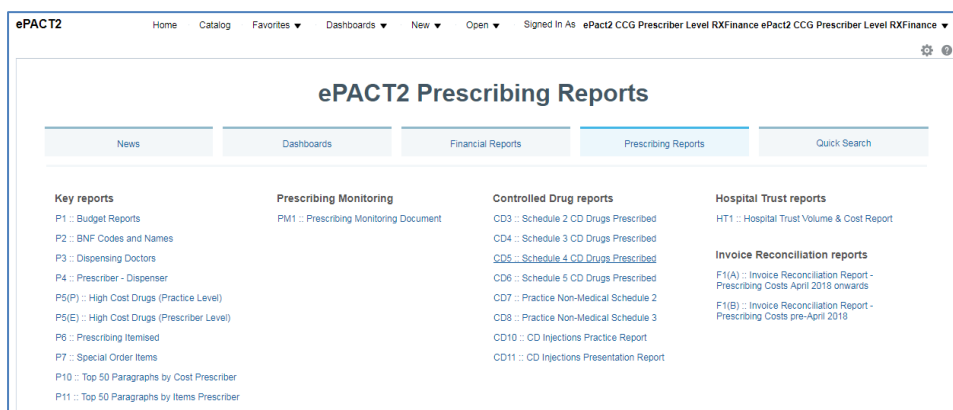
The edited version can then be saved to your 'My Folders' to be accessed

> Editing a Pre-built report will not affect the version saved within the system; the changes will only affect the version saved within the users 'My Folders'.

1. 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

2.   Select the 'Edit' link

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

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

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:

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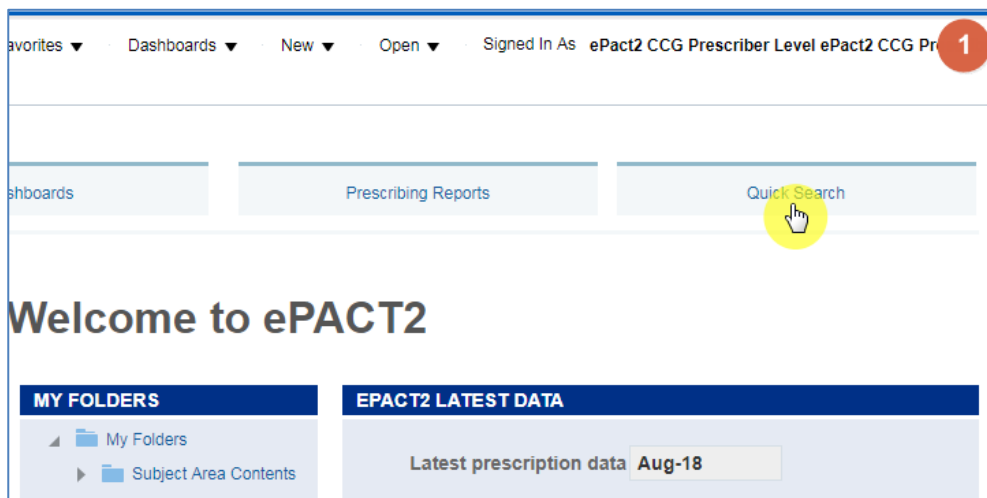
Using Quick Search

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;
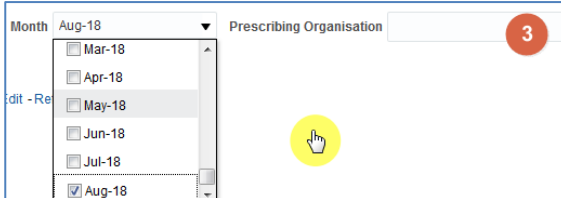
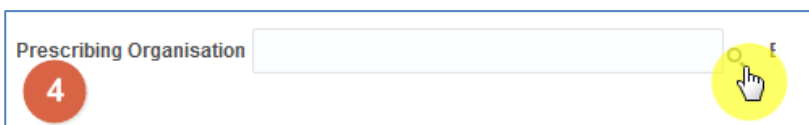1.   select the drop down arrow for the time period prompt
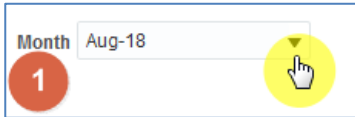
2.   Select the time period you require my marking the check box:
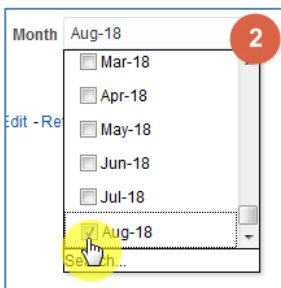
3.   Once you have selected the required time periods left click your curser anywhere on the white part of the screen and the prompt will update:

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

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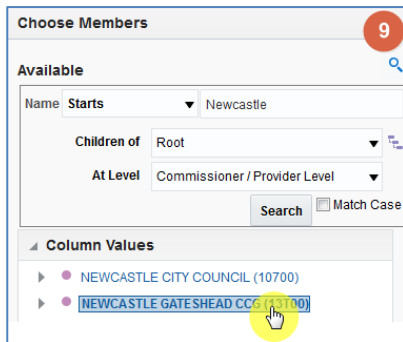

CCG's, Hospital Trusts and ISHP's are held at Commissioner / Provider' level.

Selecting your organisation level will ensure your results are returned quicker, as the system is only looking for your organisation in this level.
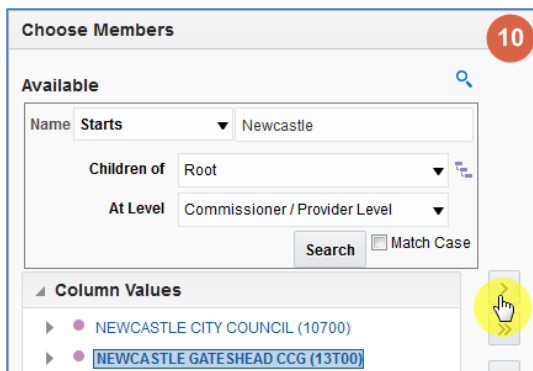
8.   Select 'Search' to search for your organisation.
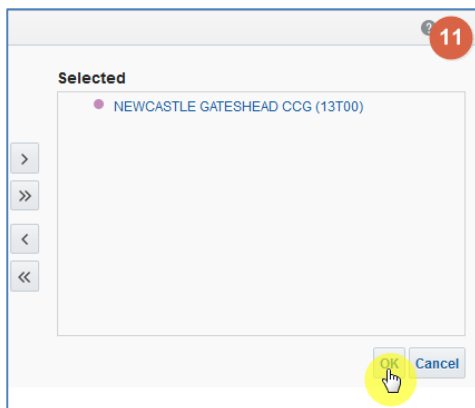

9.   Click on your organisation.
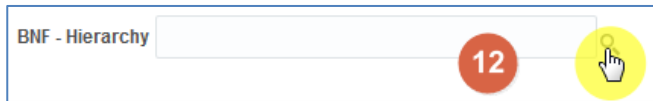
10.   Select the single arrow icon.

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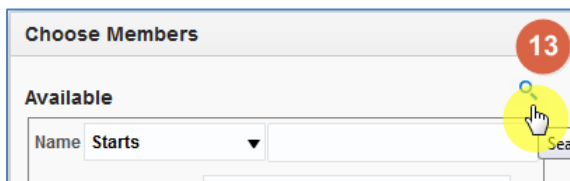
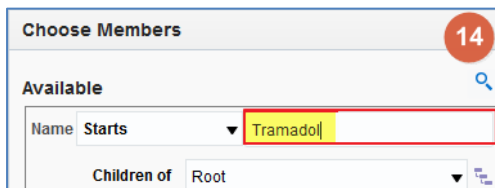12.   Select the magnifying glass for the 'BNF – Hierarchy' box

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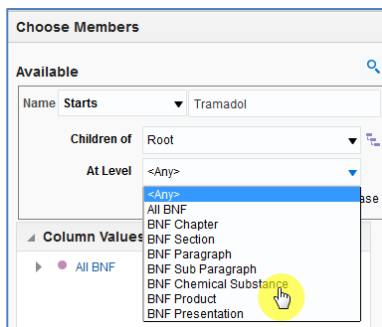
13.   Select the magnifying glass icon to bring up the search function

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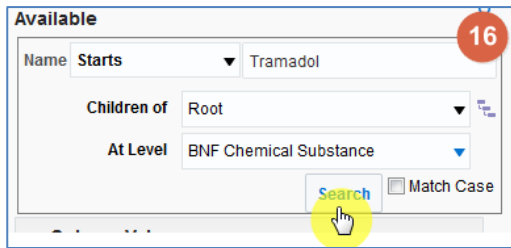

15.   Change the 'At Level' to the level you want to search the BNF for, in this example it is Chemical substance
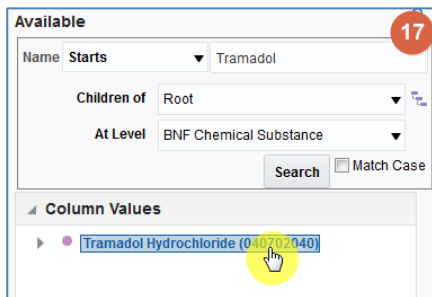

If you did not know the level of the product you are searching for, by leaving the 'At Level' box to 'Any' this would bring back every level of the BNF that contained the name your where searching.
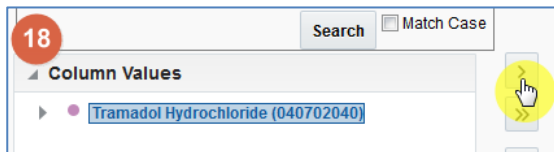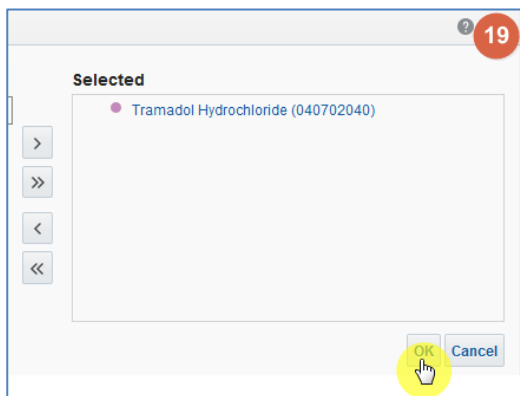
16.   Click 'Search'

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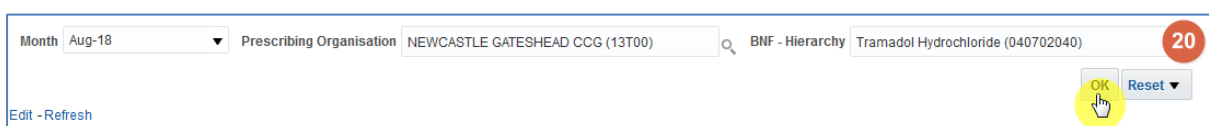

18. Select the single arrow, to move the item to 'Selected'

19. Click on OK

20. 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

Getting Help