ePACT2 Training Session

Participant's Guide

Practice 1: Logging into ePACT2, exploring the home page and accessing and navigating dashboards

Goal

In this scenario you will learn how to access ePACT2, explore the various elements of the home page and access and navigate a dashboard.

Time

25-30 minutes.

Task

You will learn how to access ePACT2 from the NHSBSA website and how to login to the system. You will then explore the various elements of the home page before accessing and navigating a dashboard created by the NHSBSA.

1. **Accessing ePACT2 and logging**

    a. Access the ePACT2 login page here https://bi2-a437212.analytics.em3.oraclecloud.com/analytics/
    b. On the sign in screen for ePACT2, enter your user ID and password and click 'Sign In'.
    c. Under the 'My Oracle Services' heading select 'Oracle Business Intelligence Cloud Service'. The home page will be displayed.
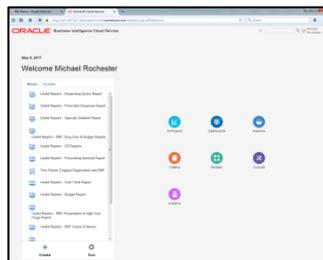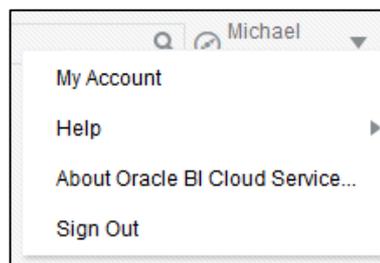

2. **Explore the ePACT2 home page**

    a. Click the dashboards bubble to view a list of available dashboards.
    b. Pick a dashboard to favourite by clicking the star next to it. We'll look at how to access favourites later ⭐
    c. Click the home button in the top right hand corner to go back to the home page 🏠

d. Click the catalogue bubble to explore the whole ePACT2 catalogue. The ePACT2 catalogue behaves like a file manager and is where content can be moved, renamed and deleted (depending on access privileges). All users will have access to 'My Folders' and is where you can save content for your own use. All users can see the contents of the 'Company Shared' folder but only some users can edit the contents of these folders. ePACT2 master users will be able to save content in the 'ePACT2 Customer Templates' folder. This allows master users to create analyses, dashboards and filters that all staff can then access and use. Users can copy content from the shared folder and save it in their own personal folder if they wish to edit it. After exploring the available folders, click the home button to return to the home page.

e. The 'Academy' bubble will direct you to an online learning environment where you can view Oracle made training materials (YouTube videos). Click the home button to return to the home page.

f. Your most recently accessed content can be seen under the 'Recent' heading on the left hand pane. Click 'Favourites' to see the dashboard you had previously added to your favourites list
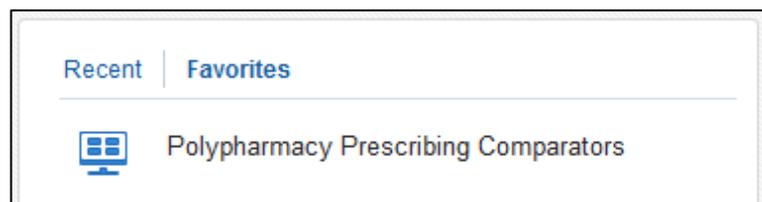

g. Click the down arrow next to your login name in the top right hand corner and select 'My Account'. Explore the 'My Account' settings. Note that you can set a particular dashboard to be your starting page when you first login to the system. Close the 'My Account' window once done.

h. Click the down arrow next to your login name and select 'Sign Out' to log out of ePACT2. Click 'Confirm' to sign out. You will be taken back to the sign in screen, sign back into the system.

3. Accessing and navigating the Polypharmacy Prescribing Comparators

a. Click the dashboards menu from the ePACT2 home page and select 'Polypharmacy Prescribing Comparators'. The comparators will open to the first page.

b. Dashboards are navigated by means of pages. The various pages can be accessed by using the menu along the top of the dashboard.
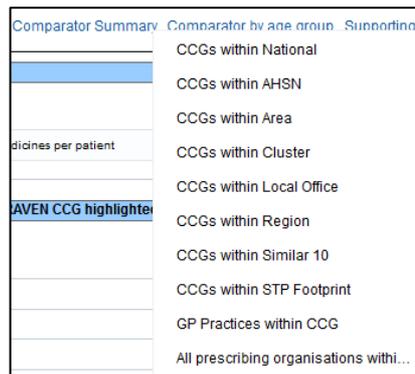
c. Dashboards can also include prompts which permit the user to make selections for a number of pre-defined parameters. Selections made in those prompts will determine the data that is displayed. After making a selection, click the 'Apply' button to apply the selections made to the dashboard page.

d. Using the prompts on the Polypharmacy Prescribing Comparators: Comparator Summary – (CCG v National) page, find out the average number of unique medicines per patient in March 2017 for Chiltern CCG.

e. Using the same page, find the percentage of patients with an anticholinergic burden score of 12 or more aged 85 or over in Bracknell and Ascot CCG in February 2017.

f. Open the 'CCGs within Area' page from the 'Comparator by age group' option in the dashboard menu bar.

g. View the average number of unique medicines per patient in Oldham CCG in November 2016 for each of the patient age groupings and see how this compares to other CCGs within the same NHS England Area.

h. Spend some time to explore the other dashboard pages using the prompts to make different selections.

Practice 2: Creating a basic analysis

Goal

In this scenario you will learn how to create a basic analysis.
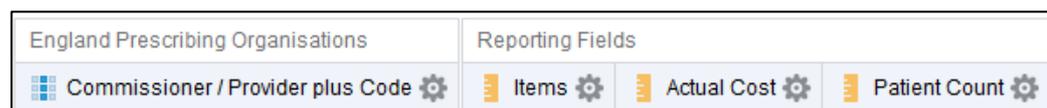
Time

25-30 minutes

Task

You will learn how to create a basic analysis by adding columns to a report. You will then view the data in tabular format before applying filters to narrow down your data.

1. **Create a new analysis using ePACT2 as the subject area**

   a. Login to ePACT2 using your supplied login credentials.
   b. From the home page, click '+ Create' followed by 'Analysis'. Select ePACT 2 as your subject area.
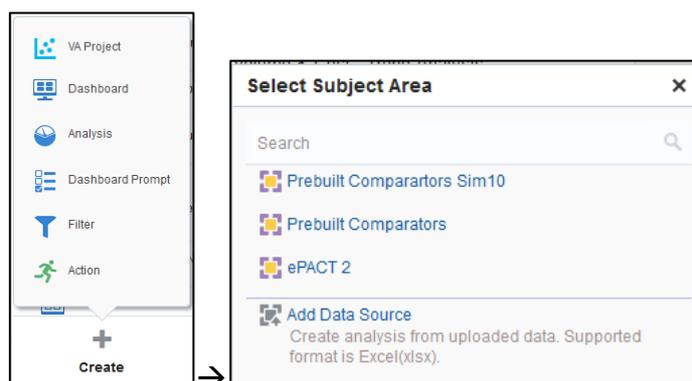

   c. The analysis editor will be displayed. From the ePACT 2 subject area, expand the time period tree and double click the 'Year Month' column. You will notice that the 'Year Month' column appears in the selected columns pane.
   d. Add the following additional columns to your analysis

   e. At this point, if you clicked the 'Results' tab, the results returned would be for all time periods and all organisations within the system, which would be a very large amount of data. As such, before viewing the results continue to the next step to filter the data.

2. Filter the analysis to show data for a specific time period and organisation

a. To show data for specific criteria, filters need to be applied to narrow down the results returned.

b. Click the cog icon on the 'Year Month' column and select 'Filter'.

c. Notice the different operators available. Leave the selection as 'is equal to/is in'.

d. Click the down arrow in the value field and select '201703'. Click OK to dismiss the 'New Filter' window.

e. Filter the 'Commissioner/Provider plus Code' column to select Ashford CCG (09C00) only.

f. Check your work:
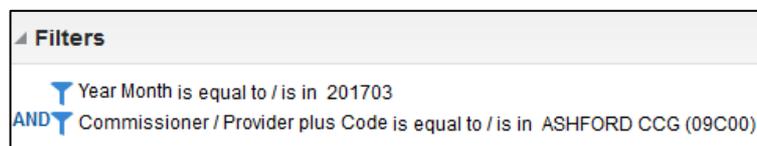
g. Click the 'Results' tab and notice the data returned is for the filtered time period and organisation only.

3. Filter the analysis using a column not shown in the analysis

a. Click the 'Criteria' tab.

b. In the filters pane, click the 'Create a filter for the current Subject Area' ⏷

c. Select 'More Columns…' and browse to and select 'BNF Chapter plus Code' from the tree and click OK. Leave the operator as 'is equal to/is in' and set the value to 'Central Nervous System (04)'. Click OK.

d. Check your work:
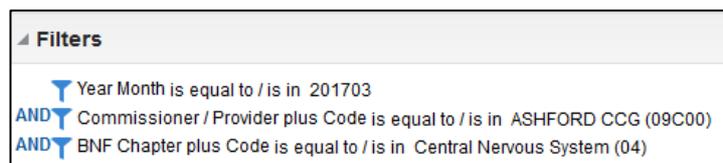
e. Click the 'Results' tab and notice the data returned is now also filtered by BNF Chapter but the BNF Chapter is not shown in the data.

f. Save your analysis as 'CNS Items and Actual Cost by CCG' in 'My Folders' using the 'Save Analysis' or 'Save As' buttons 💾 🖫

Practice 3: Adding views to an analysis

Goal

In this scenario you will add additional views to your analysis and edit those views

**Time**

30-35 minutes

Task

You will learn how to add additional views to your analysis to visualise your data in different ways. You will also learn how to edit and format those views.

1. **Adding different views to an analysis**

   a. Click the 'Criteria' tab.
   b. Edit the 'Year Month' filter by hovering your mouse over the filter and clicking the 'Edit Filter' button ✏
   c. Add the five successive months to the filter so that you have selected October 2016 to March 2017 inclusive.
   d. Check your work:
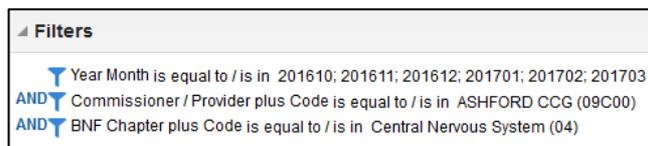
   e. Click the 'Results' tab.
   f. Click 'New View' and note the various views that are available. Select the line graph option. The selected graph type will appear. Note that the default line chart shows the CCG name as a selection prompt above the line chart.
   g. Click the 'Remove View from Compound Layout' button on the table view ✖
   h. The table view will no longer be shown. However note that under the 'Views' pane in the left hand bottom corner, the table can be selected and re-added to the view by clicking and dragging it into the Compound Layout wherever a dark blue line shows:
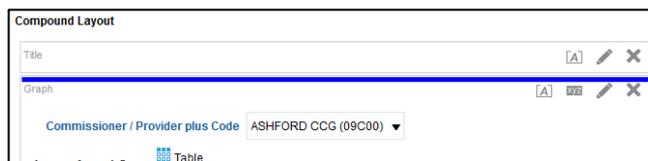
   i. Ensure the table view is not showing before continuing.

2. Editing analysis views

a. Click the 'Criteria' tab.

b. Edit the Commissioner/Provider plus Code filter and add the following additional organisations to the filter. Use the 'Search…' option to search for these organisations 🔍

> Newbury and District CCG (10M00)
> Swale CCG (10D00)
> Calderdale CCG (02T00)
> South Cheshire CCG (01R00)

You will need to ensure the 'Match Case' option is de-selected ☐ Match Case
When you have searched for an organisation, use the 'Move' icons to move the searched for organisation in the 'Selected' pane

> ‹
> «
> ›
> »

Once all organisations have been added to the 'Selected' pane, click OK and OK again on the 'Edit Filter' window.

c. Check your work:


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◢ Filters
    ▼  Year Month is equal to / is in  201610; 201611; 201612; 201701; 201702; 201703
AND ▼  Commissioner / Provider plus Code is equal to / is in  ASHFORD CCG (09C00); NEWBURY AND DISTRICT CCG (10M00); SWALE CCG
        (10D00); CALDERDALE CCG (02T00); SOUTH CHESHIRE CCG (01R00)
AND ▼  BNF Chapter plus Code is equal to / is in  Central Nervous System (04)
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d. Click the 'Results' tab. Note that the Commissioners/Providers you filtered on can be selected from the drop down selection at the top of the line graph. Select different commissioner/providers to see how the view changes accordingly.

e. Click the 'Edit View' button on the line graph window ✏ . The layout pane will open. Enlarge the layout pane by clicking and dragging the size slider in the layout pane title bar.

f. Click and drag the Items and Patient Count Columns from the Measures box to the Excluded box. Click 'Done'. Note that the line graph now shows actual cost only.

g. Add a new vertical bar chart view.

h. Edit the vertical bar chart and set the 'Year Month' column as a graph prompt. Click 'Done'. View and compare the items, actual cost and patient count of each CCG over a few months.

i. Click 'View Properties' on the bar chart and explore the various options available ⬚ . Click OK when you have finished.

j. Save your analysis as 'CNS Items and Actual Cost CCG Views' in 'My Folders' using the 'Save As' button.

Practice 4: Creating, saving and using saved filters

Goal

In this scenario you will create and save filters for use in analyses.

**Time**

25-30 minutes

Task

You will learn how to create and save a saved filter and how to use it in an analysis.

1. **Create and save a saved filter**

   a. From the ePACT2 home page, click '+ Create' followed by 'Filter'.
   b. Select the ePACT 2 subject area. The create filter window will open.
   c. Open the Organisation tree and double click 'Practice plus Code'. Include the following practices in the filter:
      Hollington Surgery (G82049)
      Sydenham House Medical Centre (G82050)
      Woodchurch Surgery (G82053)
      Willesborough Health Ctr. (G82080)
   New Hayesbank Surgery (G82087)
   d. Check your work:
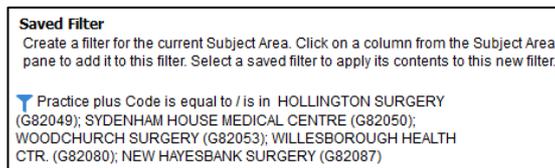
   e. Save the filter in 'My Folders' and name it 'North Locality Practices'. Confirm the save location as 'My Folders' if asked. Close the new filter window.
   f. Create a new analysis based on the ePACT 2 subject area and include the following columns: Year Month, Practice plus Code, BNF Chapter plus Code, Items and Actual Cost.
   g. Under the 'Catalogue' pane, browse to 'My Folders' and double click the 'North Locality Practices' filter. Note the filter options that are available. Leave both options deselected and click 'OK'.
   h. Add an in-line filter to filter on year month 201401.
   i. Check your work:
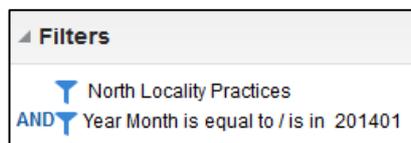
j. Click the 'Results' tab and note the results are based on the practices in your saved filter.

k. Save the analysis as 'North Locality Practices Items and Actual Cost' in 'My Folders' and return to the home page.

2. Edit a saved filter to include other columns

a. Browse to the ePACT2 catalogue and locate the 'North Locality Practices' filter in 'My Folders'.

b. Click 'Edit' on the 'North Locality Practices' filter. The 'Edit Filter' window will open showing you the existing contents of the filter.

c. Add the 'BNF Chapter plus Code' column to the filter and filter on chapters 1 to 5. Click OK to add this selection to your filter. Note that you can create saved filters that filter on a whole range of different columns all at once.

d. Check your work:
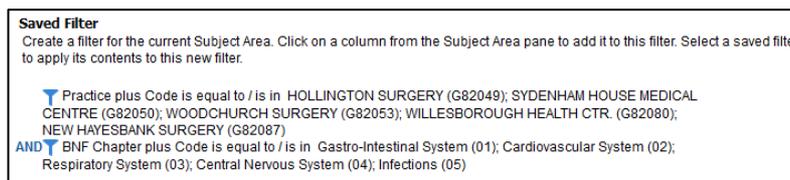
e. Click 'Save As' and name the filter 'North Locality Practices BNF Chapters 1-5'. Close the 'Edit Filter' window.

f. Browse to the ePACT2 catalogue and click edit on the 'North Locality Practices Items and Actual Cost' analysis you saved earlier in 'My Folders'.

g. Click the 'Criteria' tab and remove the 'North Locality Practices' filter from the analysis. Add the 'North Locality Practices BNF Chapters 1-5' filter to your analysis.

h. Click the 'Results' tab and observe the results are filtered by both the practice and BNF chapter.

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 https://www.nhsbsa.nhs.uk/epact/epact2.

WebEx sessions

WebEx will be provided on a number of different topics and features. More information about these can be found here https://www.nhsbsa.nhs.uk/epact/epact2.