

# BSI Connect Plus

## Section 1 & 2: Introduction and Initial Set Up



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# 1) Introduction

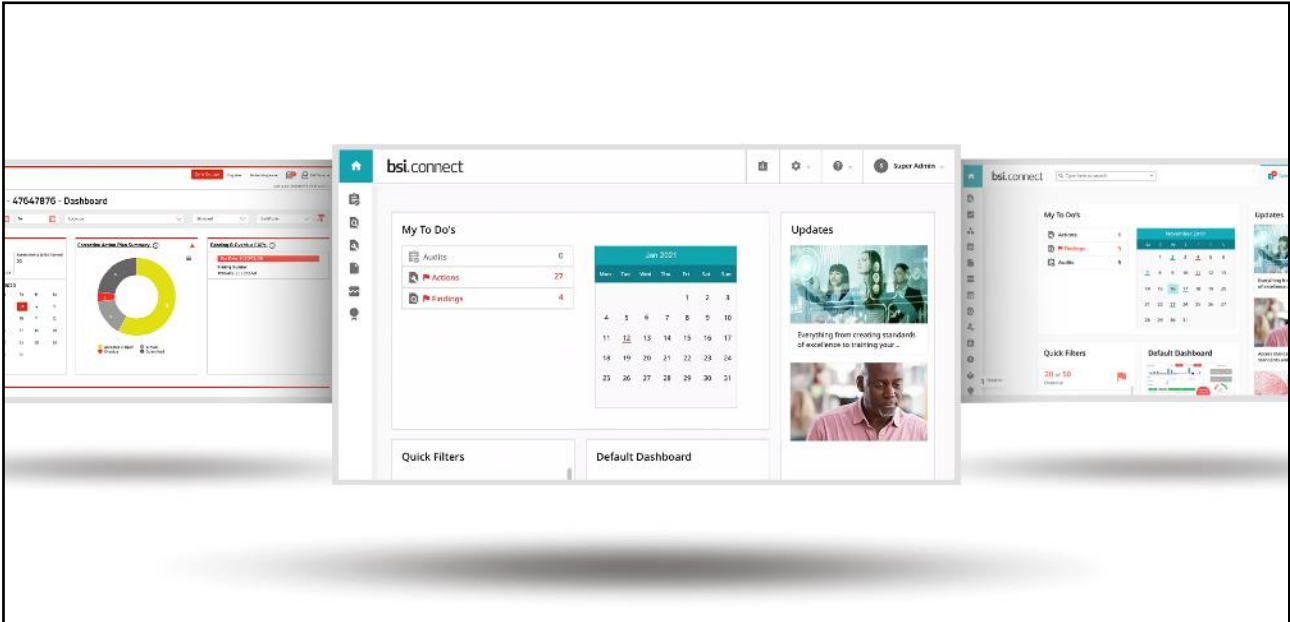


Fig.1

Welcome to BSI Connect Plus, a web-based compliance management tool from BSI. BSI Connect Plus shares many features with Connect Portal, with the added ability of creating internal audits, findings and actions.

This manual will guide you through initial set up, and how BSI Connect Plus can help manage compliance within your organization. This information is complemented by a suite of instructional videos, found in the user guides & resources section, under the question mark, in the top right of BSI Connect Plus.

## 2) Initial Set Up

To see the information contained in section 2 in a video format, see the 'account activation and password reset' video in the user guides & resources page, under the question mark, in the top right of BSI Connect Plus.

To begin using BSI Connect Plus, you will be sent an activation email, containing a link to create your password and username.

## 2.1) Activation Email & Password Creation

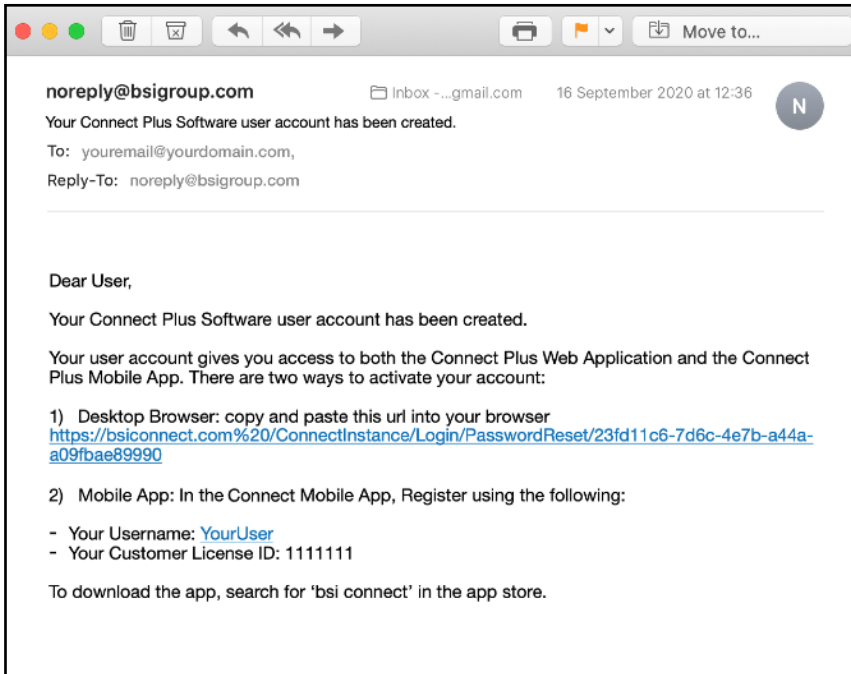


Fig. 2

Clicking the link [fig.2] will take you to the registration page [fig.3]. Your username will already be filled in.

A registration form titled "Create New Password". It has three input fields: "Username" (pre-filled with "Username"), "New Password", and "Confirm New Password". Below the fields is a red "Login" button.

Fig.3

Next, create a strong password that is at least 8 characters long, and contains 1 number and 1 letter. Click the login button to be taken to the homepage of BSI Connect Plus [fig.4].

## 2.2) Creating Locations

If you're the first user of BSI Connect Plus in your organization, you can first add your locations. Locations are an important part of the system; any users created will be associated to a location, and likewise any records created will also be associated to a location.

Please note, only users with administrator privileges will be able to create locations within BSI Connect Plus.

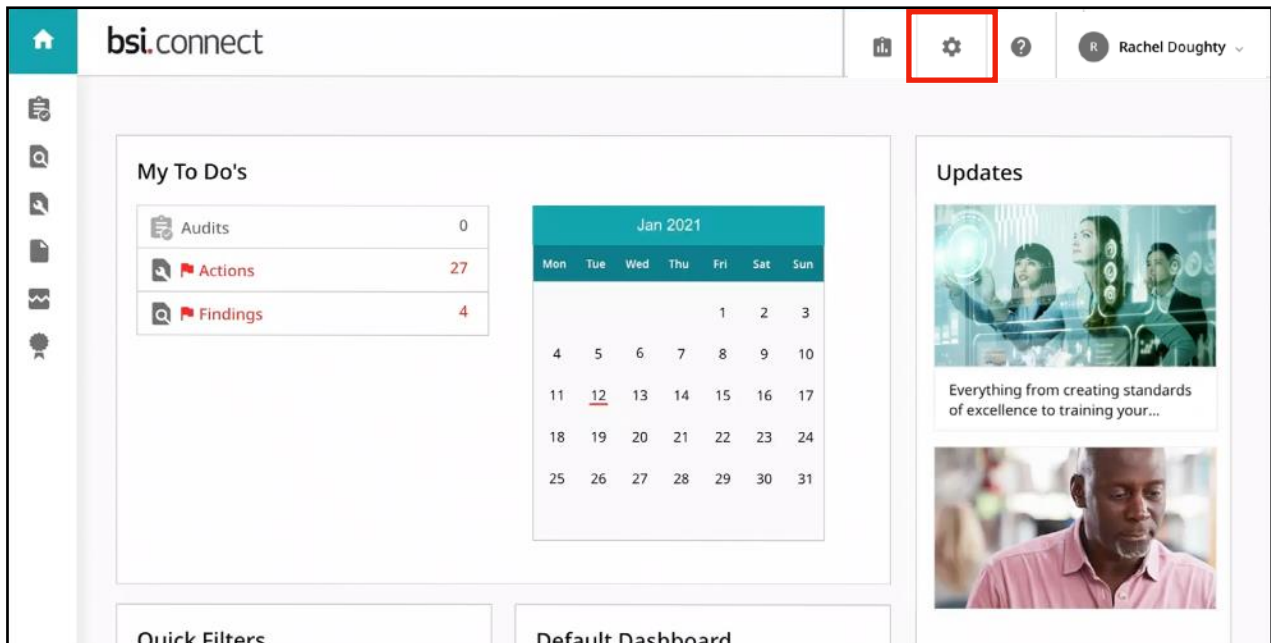


Fig. 4

From the homepage of BSI Connect Plus, select the cog [highlighted in red [fig.4]]. Select 'locations' > 'create locations'.

You can also click the **+ Add new** button next to 'locations' on the locations page.

On the location creation page, type the name of the location in the 'name' field. All fields highlighted with a \* are compulsory.

Scroll down and enter the location information into 'address line 1', 'town or city', 'postal/zip code' and any other relevant fields.

To select 'belongs to', click the  button, which will open a sub-menu.

This allows you to select where the location sits within the organization structure. If it isn't a sub location, then select the top-level organization in the tree.

Click **Apply** when you're finished.

Once you have completed the mandatory fields, click the **Create** button in the top right-hand corner.



Fig. 5

If you want to export the location information to a .pdf or .doc file, select 'export' [fig. 5]. To remove a location, select 'archive'. Click 'save' if you make any changes.

## 2.3) Creating People

There are two stages to creating a user account; the first stage is creating the person i.e. name, email, where the person is based, who they report to, etc. The second stage is to create their user details i.e. their username and their system access.

Please note, only users with administration privileges will be able to create users within BSI Connect Plus.

To create a user account, click the administration cog (highlighted [fig.6]).

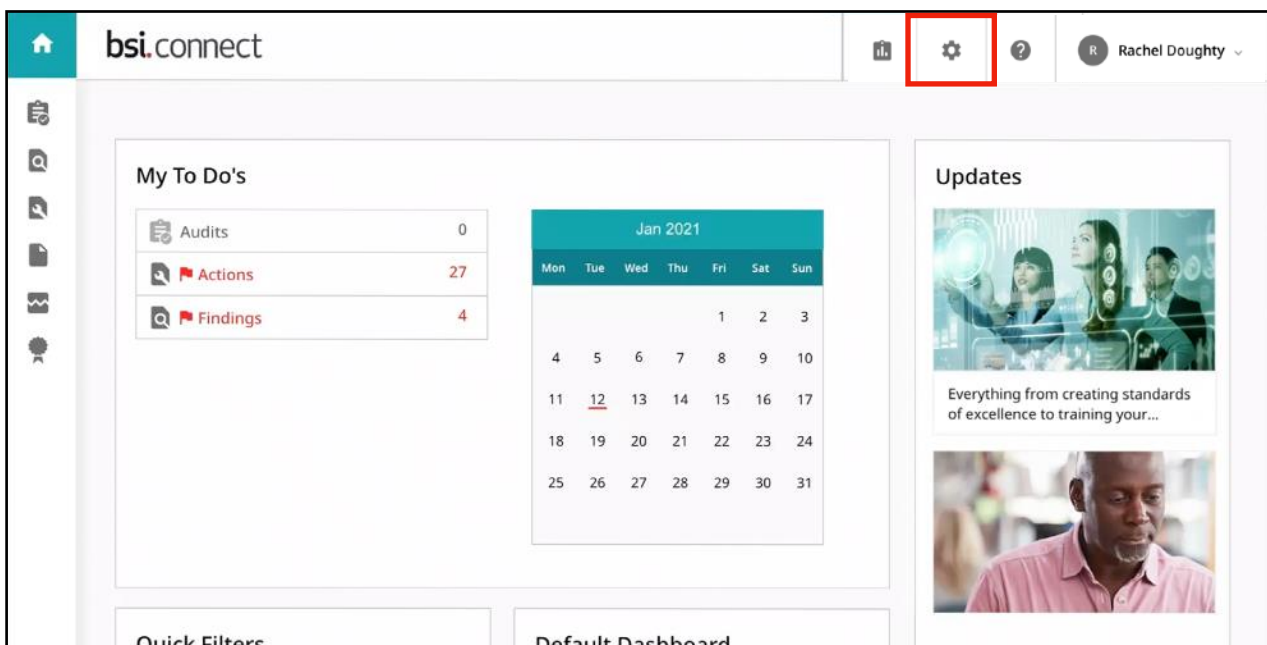


Fig.6

Click People > Create Person.


From the people page, clicking the **+ Add new** button also takes you to the user person creation page.

On the person creation page, type the new person's first and last names in the relevant fields. Make sure to complete all mandatory fields, highlighted with a \*.

Section 3, 'user details' [fig.7], is where you enable the user access fields. Please note, to successfully create a user who can log in to the system, section 3 is mandatory.

Fig. 7

Choose the user's username. This is what they will use to log in to the system. It is recommended that you keep to a consistent naming convention.

Choose the user's default language, time zone and permission by clicking the  buttons.

### 2.3.1) Permissions for User Licenses

#### Administrators:

- Create and edit people and locations
- Create and edit records
- View dashboards and reporting
- Limited by management system and location.

#### Standard Users:

- Create and edit records
- View dashboards and reporting
- Limited by management system and location.

#### Read-Only Users:

- View records, dashboards and reporting
- Limited by management system and location.

### 2.3.2) System Access for User

You can grant a user system access to all management systems and locations by selecting the default option 'grant access to all management systems and locations', or you can choose to specify them individually.

If a user does not have access to all management systems and locations, they will only see records tagged to the management systems and locations for which they have access.



First, select 'grant access by management systems and locations' in the system access section.

To add management systems, click **Add**.

From the list [Fig. 8], select one or more management systems.

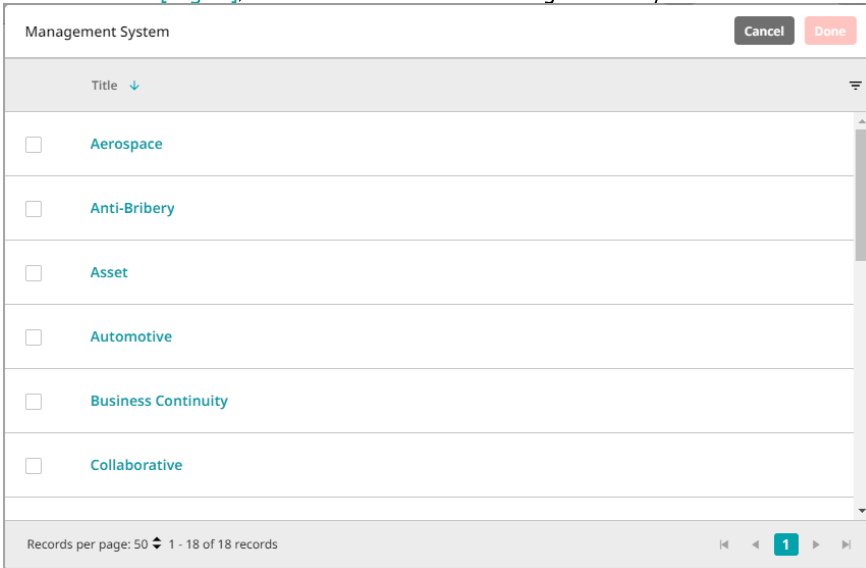


Fig.8

Then click **Done**.

To add locations, click the **Add** button.

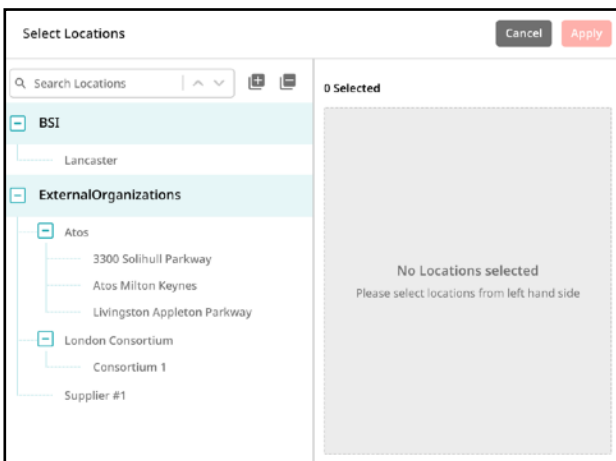


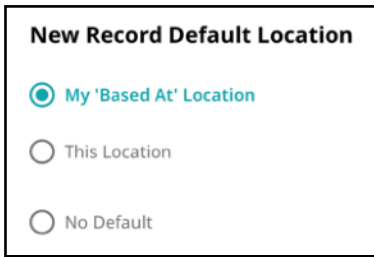
Fig.9

The left side shows your locations. You can search for them by typing in the search field.

The **+** button opens all organization hierarchies. The **-** button closes them.

The right side shows your choices. Click **Apply** when you're finished.

Next, choose the location to be the default location when a user creates a record. The location field will be automatically populated with this location but can be edited per record.



**New Record Default Location**

My 'Based At' Location

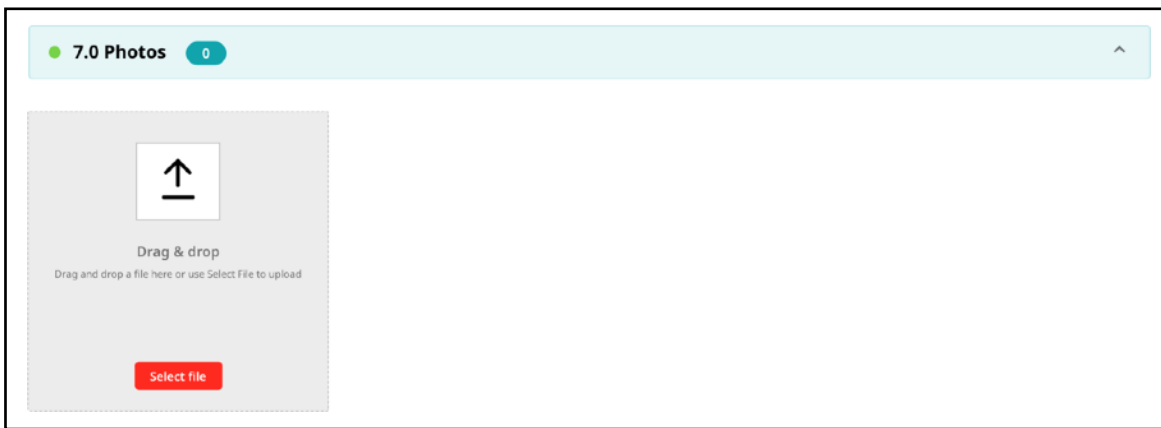
This Location

No Default

Fig.10

Below, you can add a photo to the user if your organization requires it [fig.11]. Click

**Select file** to open your computer's file selector.



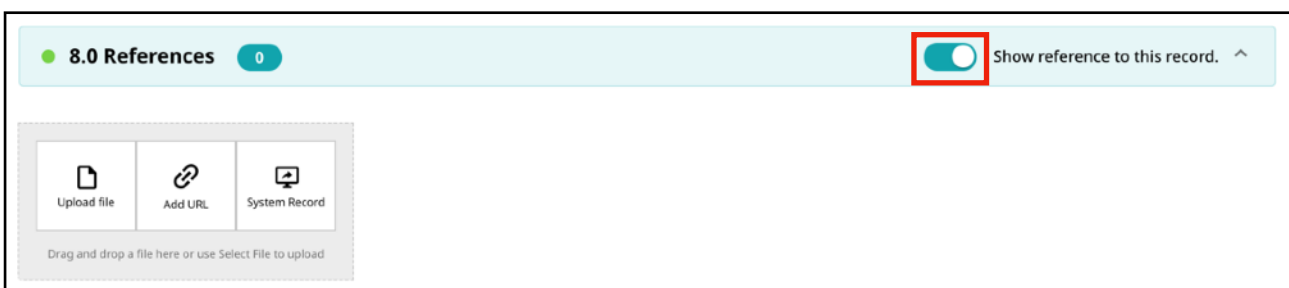
7.0 Photos 0

Drag & drop  
Drag and drop a file here or use Select File to upload

Select file

Fig.11

If you need to add any files relevant to this person, you can do so in the references section [Fig. 12].



8.0 References 0

Show reference to this record. ^

Upload file Add URL System Record

Drag and drop a file here or use Select File to upload

[Fig. 12]

Once you have completed the mandatory fields, click the **Create** button in the top right-hand corner. Upon selecting 'create', the user will receive an activation email inviting them to create a password for the system.