

Connect Plus

Section 3: Navigating the Home Page



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3) Navigating the Homepage

To see this content in video format, please see our navigation video, found in the user guides and resources page, under the question mark, in the top right of BSI Connect Plus.

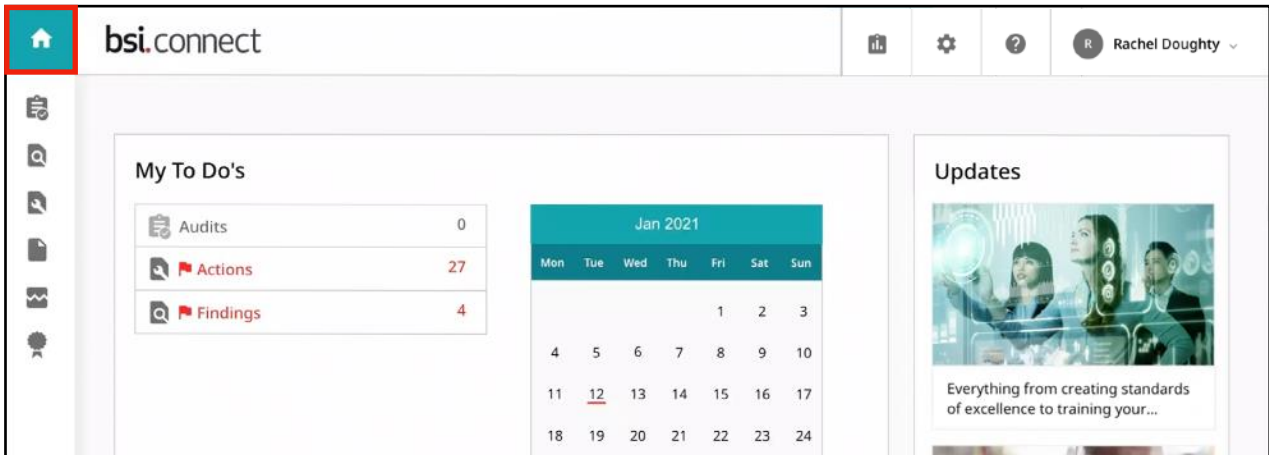


Fig. 1

The home button (highlighted [fig.1]) is available on all pages. Use it to return to the home page from wherever you are in the system.

3.1) Reporting

Clicking the report button (highlighted in [fig.2]) brings you to the reporting page, where you can access the finding and actions dashboard, along with other BSI reports.

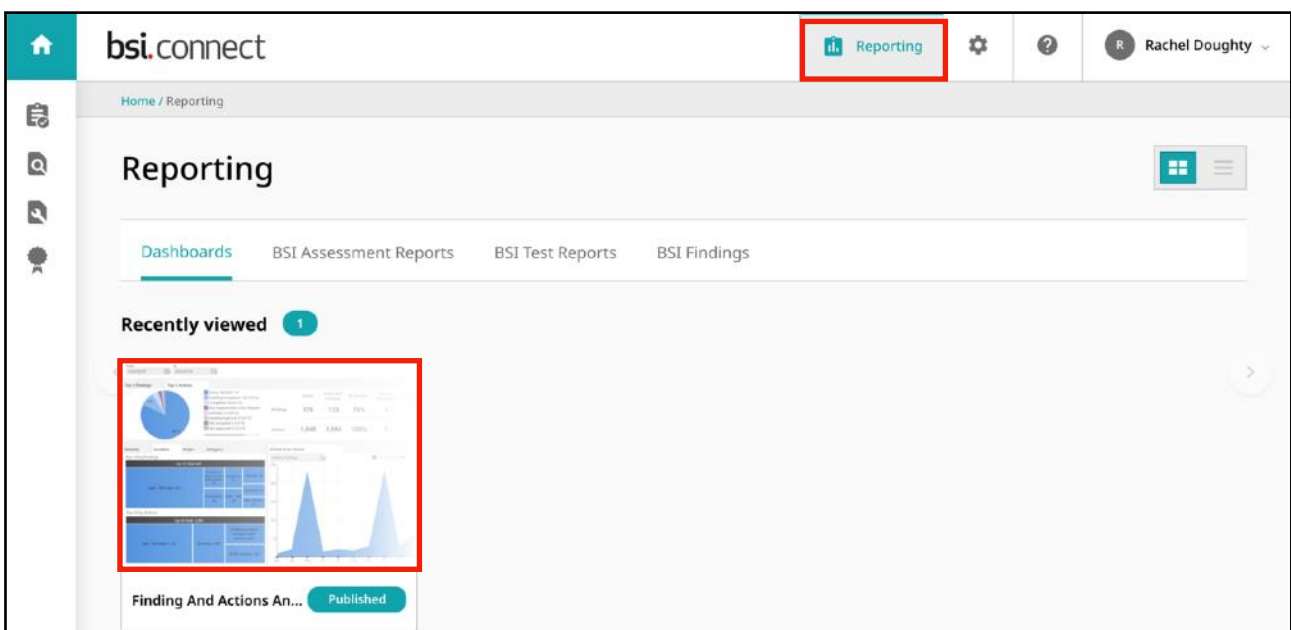


Fig. 2

Clicking on the thumbnail (highlighted in [fig.2]) will take you to the findings and actions dashboard.

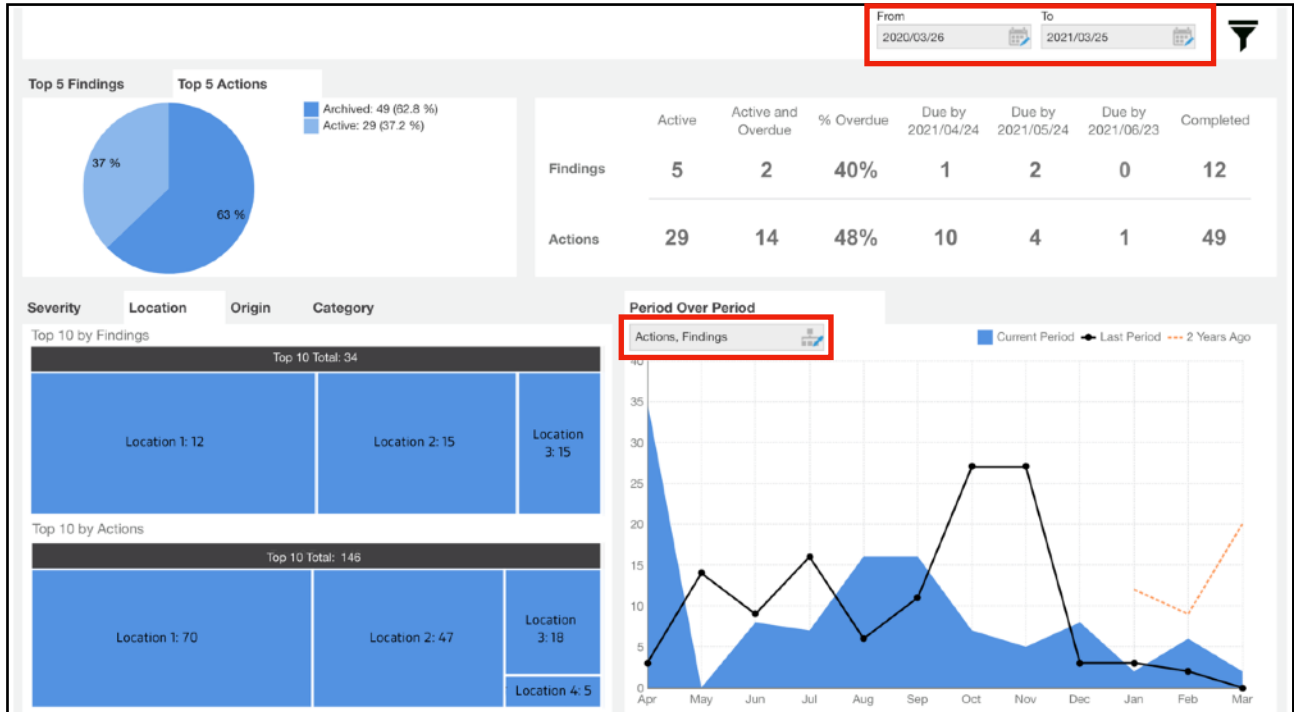


Fig. 3

Data is displayed for the default date range, year to date (highlighted in [fig.3]). Clicking on the date boxes in the top right corner will allow you to change the date range.

Clicking the filter button  in the top right corner opens the filtering options.

The top of the dashboard has a pie-chart that compares the number of actions in different statuses. Clicking 'top 5 findings' will produce the same pie chart, for findings only.

For more information on statuses, look to section 5.3. Finding Statuses and 6.3. Action Statuses.

The infographic on the right allows you to quickly see information about your findings and actions.

Below these are two visualizations. The one on the left shows which of your locations had the most findings and actions, respectively.

Clicking the header 'severity' will produce a bar graph, displaying the number of findings and actions that were categorized as low, medium and high severity.

Clicking 'origin' produces a bar chart that displays the number of findings and actions produced from different areas of BSI Connect Plus, such as from within findings or audits.

Clicking 'category' produces a bar chart that displays the number of findings and actions that are in specific categories, such as quality control or health and safety.

The chart on the right shows you a linear timeline of the number of findings and actions, past data.

Clicking the button opens a menu.

Deselecting actions or findings will change the graph to show either actions, findings, or both. Click the tick button

to complete your selection.

3.2) Administration

To access the administration pages from the home page, click the cog (highlighted [\[fig.4\]](#)).

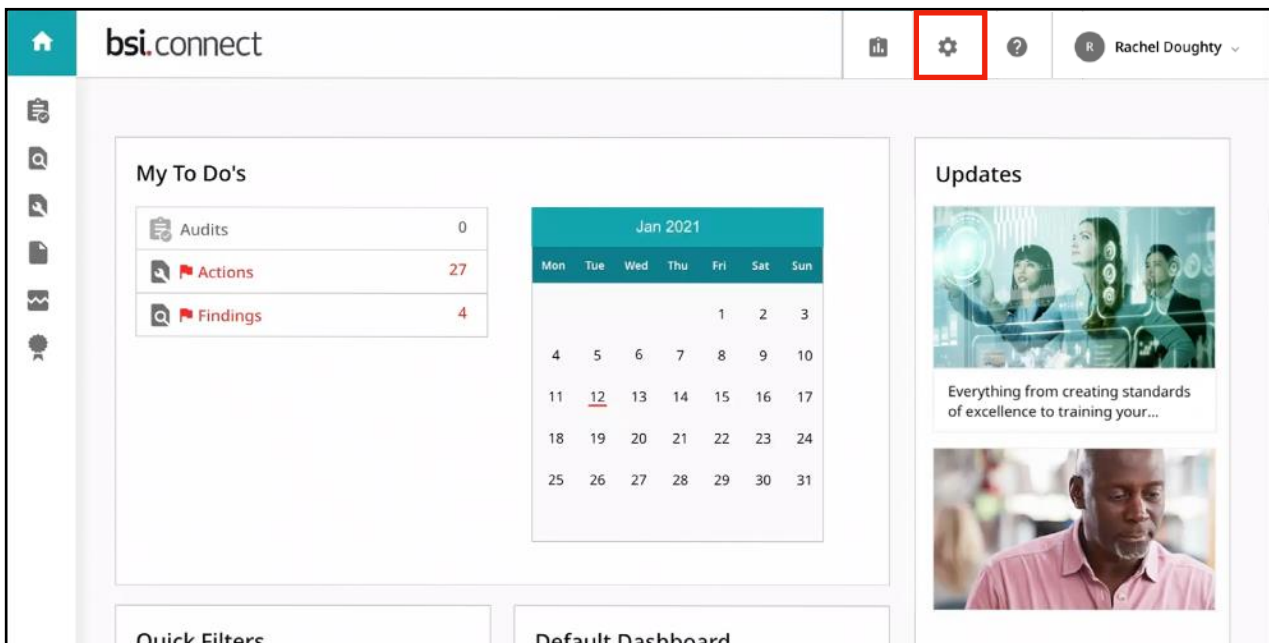


Fig. 4

3.2.1) Searching and Filtering Locations and People

Click 'locations', or 'people'. Both pages have the same structure.

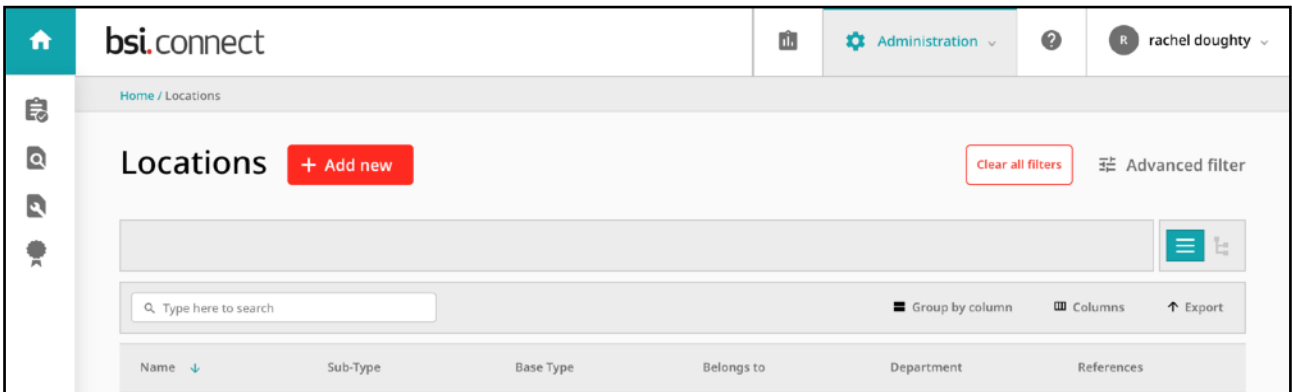


Fig. 5

3.2.1.1) Using the Advanced Filter

'Advanced Filter' is in the top right. This allows you to create and save specific filters for whatever record type you are in. For this example, filters can be created for the location page.

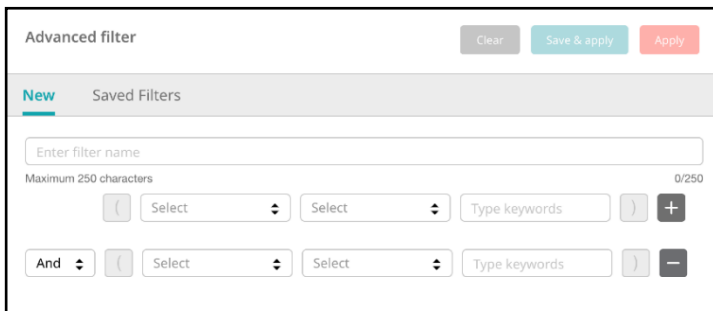



Fig. 6

Name your filter by typing in the top field.

On the next line, click the arrow button , and select a condition from the drop down, from left to right to create your filter.

Clicking the  button adds a new filter row, so you can drill further into your data.

Clicking the  button deletes a filter row.

You can decide whether you want to return records that follow both filter requirements or follow one or the other by changing the 'and' drop-down option on the left side to 'or'.

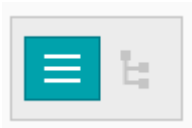
The brackets allow you to combine filters together.

Click the **Apply** button to search using your filter.

To save your filter to use at another time, click the **Save & apply** button. You can find your saved filters by clicking the 'Saved Filters' header next to 'new'. To clear your filters, click the **Clear** button.

3.2.1.2) Changing the record view

On the line below the 'advanced filter' button is the 'list view' and the 'hierarchy view' buttons:



Clicking these affects how the records will be displayed. The hierarchy view is useful for visualizing the relationships between people or locations. For instance, it could show all the users who report to another user.

3.2.1.3) Configuring the Columns

Above the column headers are the column configuration options and the export function.



Fig. 7

You can type in the search field to return a specific record.

Clicking 'Group by Column' will produce the menu below [fig.8].

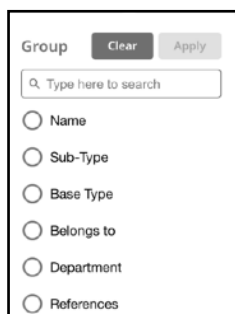


Fig. 8

This allows you to group specific records together. You can also search for a specific column option by typing in the 'type here to search' field.

To clear a grouping, click the

Clear grouping

button which will appear next to the 'advanced filter' button when a grouping is applied.

Next to 'group by column' is 'columns'. Clicking this will produce a list of all columns available in the record grid.

If you select many columns, you may need to scroll left or right to view them. The scroll bar is at the bottom of the record grid.

3.2.1.3) Filtering the records using the Column Headers




Name	Sub-Type	Base Type	Belongs to	Department	References
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Fig. 9

Hover over a heading and it will become dark grey. Click the  button to the right of the column label to sort.

Columns can be sorted or filtered. Sorting can be set to ascending, descending or off. Sorting is applied cumulatively. For example, if you apply a sort to both the title and the date columns, it will sort in the order you applied them.

If it appears that sorting is not working as you'd expect, ensure there is not a sort applied to another column (either off screen, or hidden).


If you click and drag on the boundary of a column, you can make the column wider or narrower. Clicking the  button next to the header allows you to filter the records.

At the bottom of each record list are pagination options (highlighted in [fig.10]).



Records per page: 50	1 - 40 of 40 records	<<	<	1	>	>>
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Fig.10

Click the  button to alter the number of records displayed on each page. To the right, use the arrows to navigate through the pages of records.

At the top of the page, use the clear all filters button **Clear all filters** to clear any filters applied.

Your filters will be saved when you log out.

3.3) Help Section

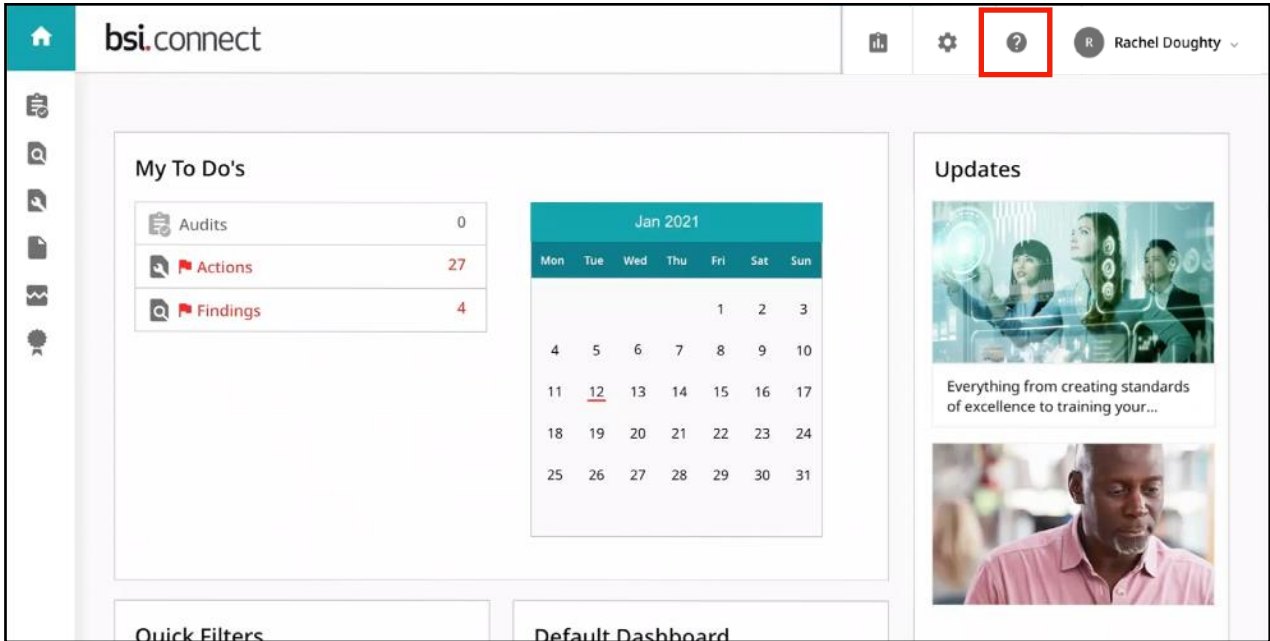


Fig.11

To access support resources from the home page, click the question mark (highlighted in [fig.11]).

3.3.1) User Guides and Resources

Click this option to be taken to the help portal.

3.3.2) About bsi.connect

Click here to discover the system version number, and your client ID (required if you wish to use the BSI Connect Mobile app).

3.4) Account Profile

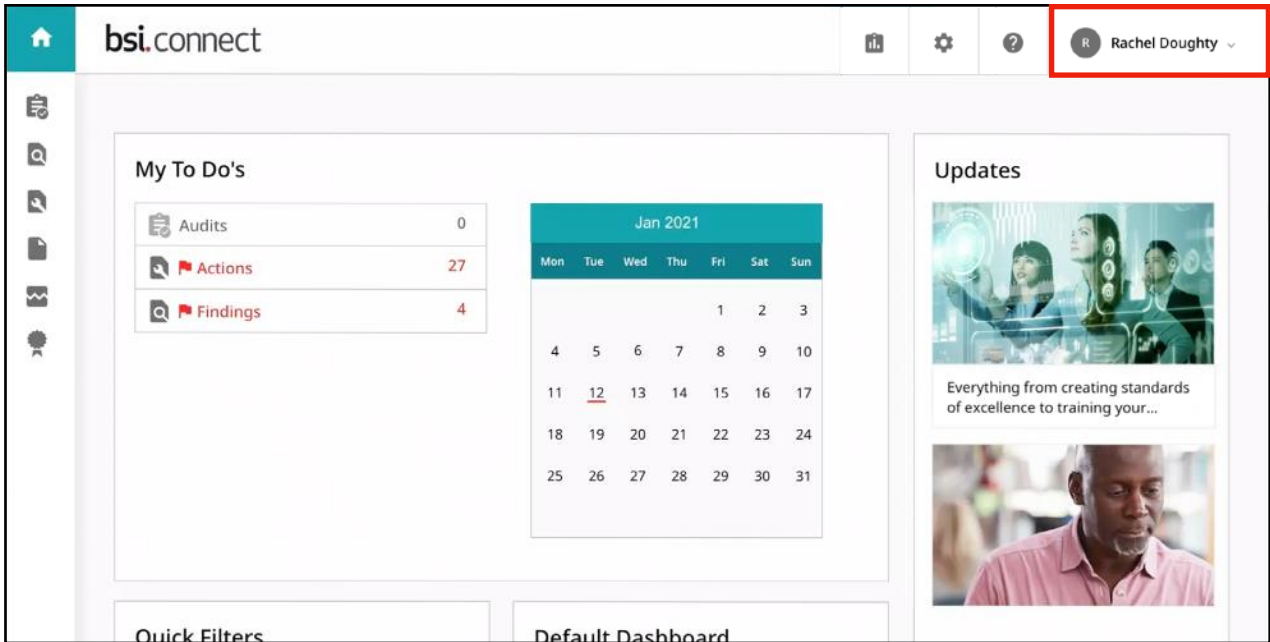


Fig.12

Click your username (highlighted [fig.12]) to see the account profile options.

3.4.1) Profile

Click profile on the drop-down menu.



Fig.13

You can change how your name appears in BSI Connect Plus here.

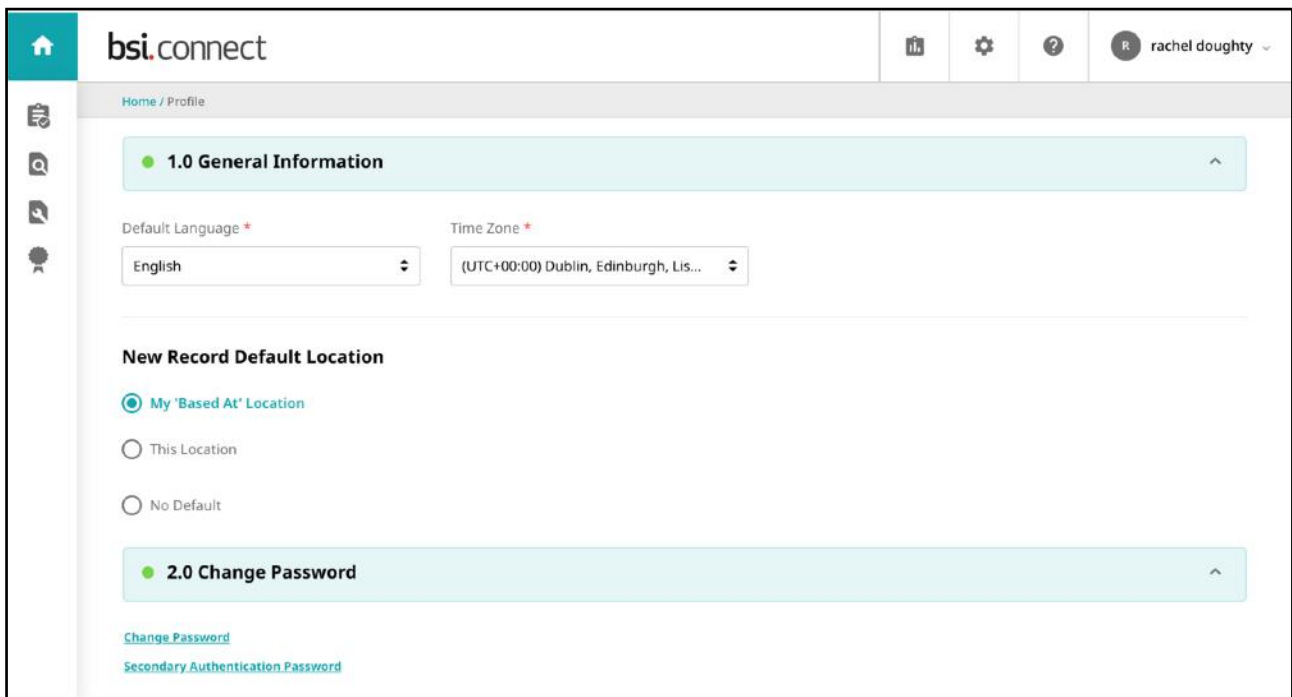


Fig. 14

You can also change your time zone, language, and default location.

3.4.1) Password Reset

If you wish to change your password, click 'Change Password' [fig.14].

The image shows a 'Create New Password' form. It has a title 'Create New Password' at the top. Below the title, there are four input fields: 'Username *' with the value 'Racheldoughty98@gmail.com', 'Current Password *' with masked characters '.....', 'New Password *' with the placeholder 'Type here', and 'Confirm New Password *' with the placeholder 'Type here'. At the bottom of the form is a red 'Confirm' button.

Fig. 17

Type in the field to select a new password. Passwords in BSI Connect Plus must be at least 8 characters long, and contain at least 1 number, and 1 letter.

The form is titled "Change Secondary Password". It contains three input fields, each with a red asterisk indicating a required field. The first field is labeled "Current Password" and contains the placeholder text "Type here". The second field is labeled "New Password" and also contains "Type here". The third field is labeled "Confirm New Password" and contains "Type here". Below the input fields is a red button with the text "Confirm".

Fig.16

3.4.2) Forgotten Passwords

If you have forgotten your password, you can use the 'forgot' link on the log in page (highlighted in [fig.17]).

The login page features the "bsi.connect" logo at the top. Below the logo is the text "Welcome to bsi.connect". There are two input fields: "Username" and "Password", both with red asterisks. A "Forgot" link is positioned to the right of the password field and is highlighted with a red border. Below the input fields is a red "Login" button. At the bottom right, it says "Powered by bsi.".

This will send a password reset email to the email address in your account.

3.4.4) Forgotten Username

If you forget your username, please contact one of your system administrators.

3.5) Connect Features

On the top right menu of BSI Connect Plus is the 'Connect features' button (highlighted [fig.18]).

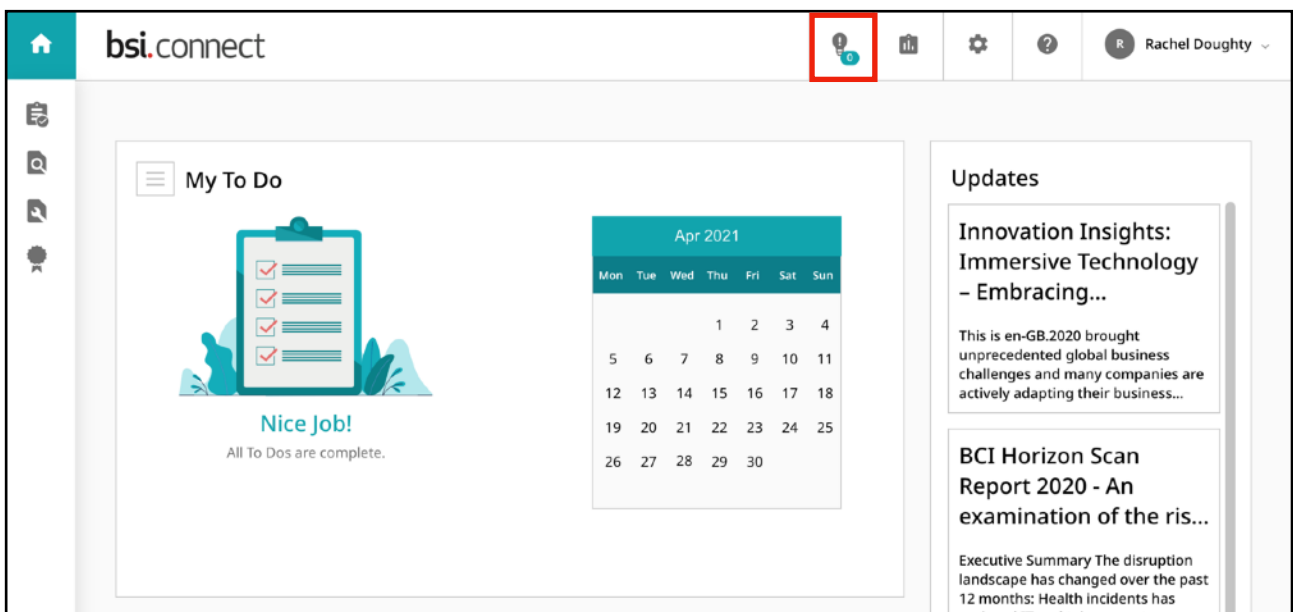


Fig. 18

When you log in as a new user, the teal number on the Connect features icon will be greater than 0. This number reflects the number of tours you are yet to complete. These tours explain the features available throughout BSI Connect Plus.

You will also see a 'let's go' icon in the bottom right corner of the software - clicking here shows you the different tours available. You will see a percentage of tours completed in the window.

If you don't wish to complete the tours, click 'no thanks' in the top right corner of the window.

If you have completed the tours and wish to revisit them, click the Connect Features button (highlighted [fig. 18]). A drop down will show the completed tours in a lighter grey. Click an option to restart the tour.

3.6) Home Page Contents

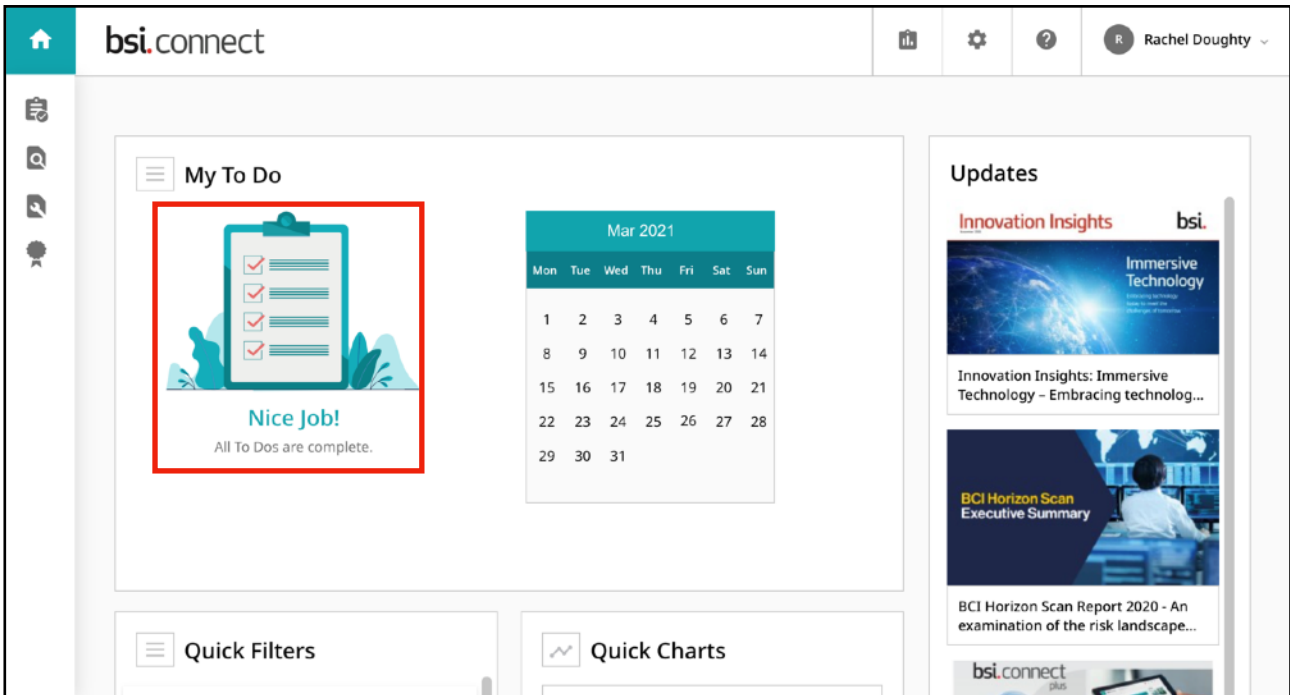


Fig. 19

Under 'my to do' you will either have the graphic highlighted above [fig.19] if you have completed all your tasks, or a grid displaying the number of actions, findings and audits that need your attention.

Next to this is a calendar displaying upcoming dates of interest, e.g. due dates of findings or actions.

Below 'my to do', you can click on the quick filters to be taken to a that filtered list of records.

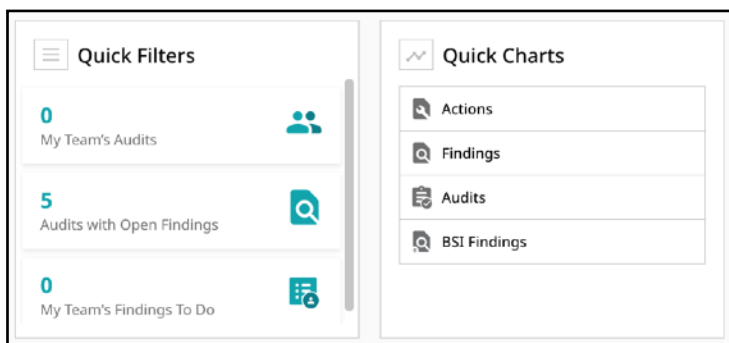


Fig. 20

You can click on each of the quick charts to be taken to the relevant pages.

Below the quick filters and quick charts are charts showing BSI CAPs and internal findings [\[fig.21\]](#).

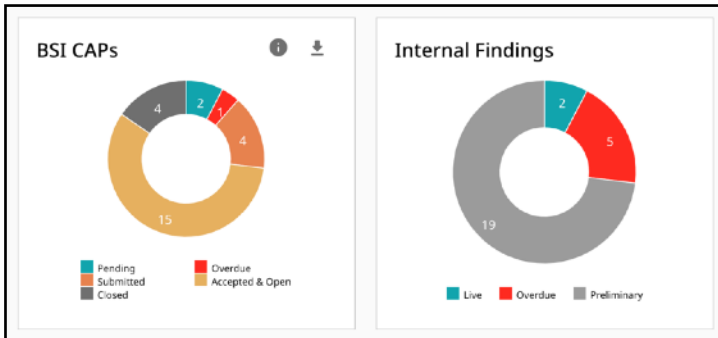


Fig. 21