

Connect Plus

6) Actions



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6) Actions

In BSI Connect Plus, actions can be created and allocated to any user with the necessary permissions. They are usually created as a mechanism to address findings, but they can be created as standalone records, as necessary.

To see the information contained in sections 6.1 - 6.2 in a video format, see the 'actions' video in the User Guides & Resources page, under the question mark, in the top right of BSI Connect Plus.

6.1) Viewing, Exporting and Filtering your Actions

Click on the left menu, click 'actions' then 'view actions' (highlighted [fig.1]) to view the menu.

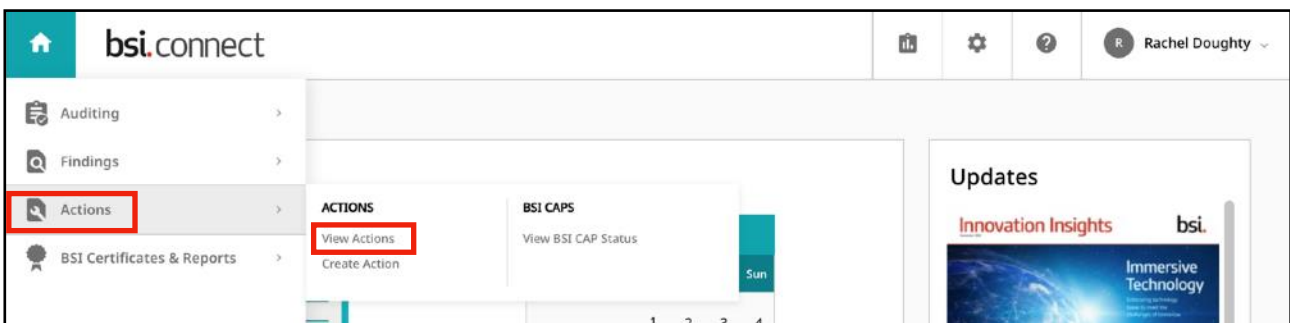


Fig. 1

This will take you to the actions record grid [fig.2].

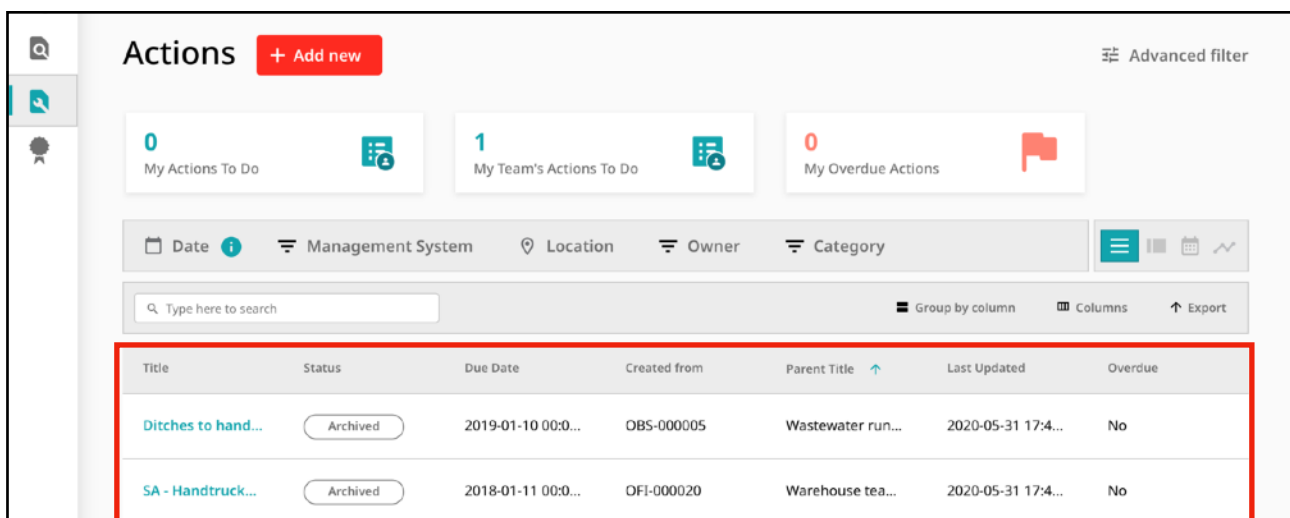


Fig. 2

Your actions are displayed in the record list (highlighted [fig.2]). You can organize how the records are displayed with various sorting and filtering options, including which columns are visible and what information about each action is displayed.

6.1.1) Using the Advanced Filter

The advanced filter is in the top right. This allows you to create and save specific filters.

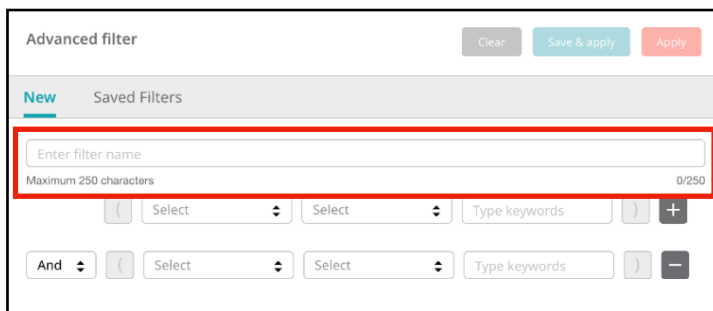




Fig. 3

Name your filter by typing in the field (highlighted [fig.3]).


Click the  button, and select an option 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 only one by changing the 'and' field on the left side to 'or'.

The brackets allow you to combine filters.

Click the  button to search using your filter.

To save your filter to use at another time, click the  button.

You can find your saved filters by clicking 'saved filters' header next to 'new'.

To clear your filter specifications, click the  button.

6.1.3) Using the Quick Filters

Below the advanced filters are the quick filters [fig.4].

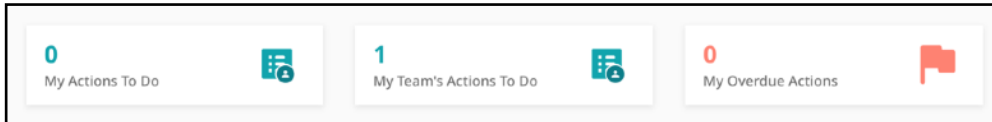


Fig. 4

Click these to quickly filter the records. To cancel a filter, click the **Clear all filters** button.

6.1.4) Using the Common Filters

Below the quick filters are the common filters [fig.5].



Fig. 5

Filter your records by date, management system, location, owner and category by clicking the icons to the left of each word.


6.1.5) Changing the Record View


To the side of the common filters are the record list view, card view, calendar view, and chart view choices [fig.6].



Fig. 6

These affect how the records are shown. Any filters applied will stay when switching views.

The  button produces the 'list view'.

The  button produces the 'card view', shown on the next page [fig.7].

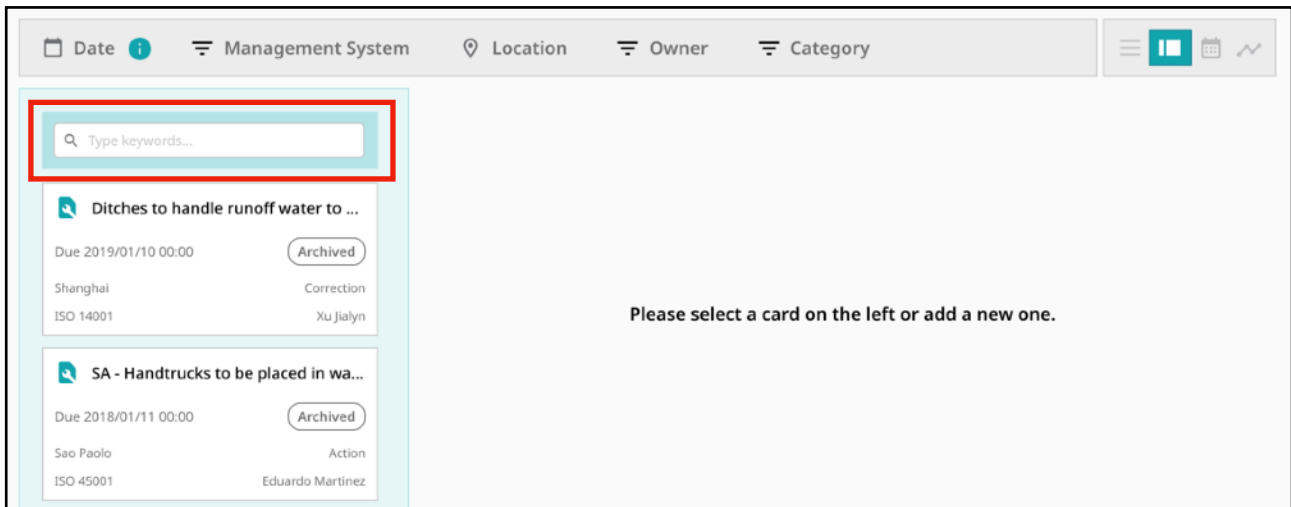


Fig. 7


The cards are shown on the left. You can search for a specific record by typing in the field (highlighted [fig.7]) and clicking the magnifying glass.

You can use quick filters, column filters and the advanced filter in the list view. You can scroll down through cards on the left.

If you scroll to the bottom of the record list, you will see the menu below. [fig.8].



Fig. 8

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  button to clear any filters applied.

Click on a card to see more detail and edit the record.

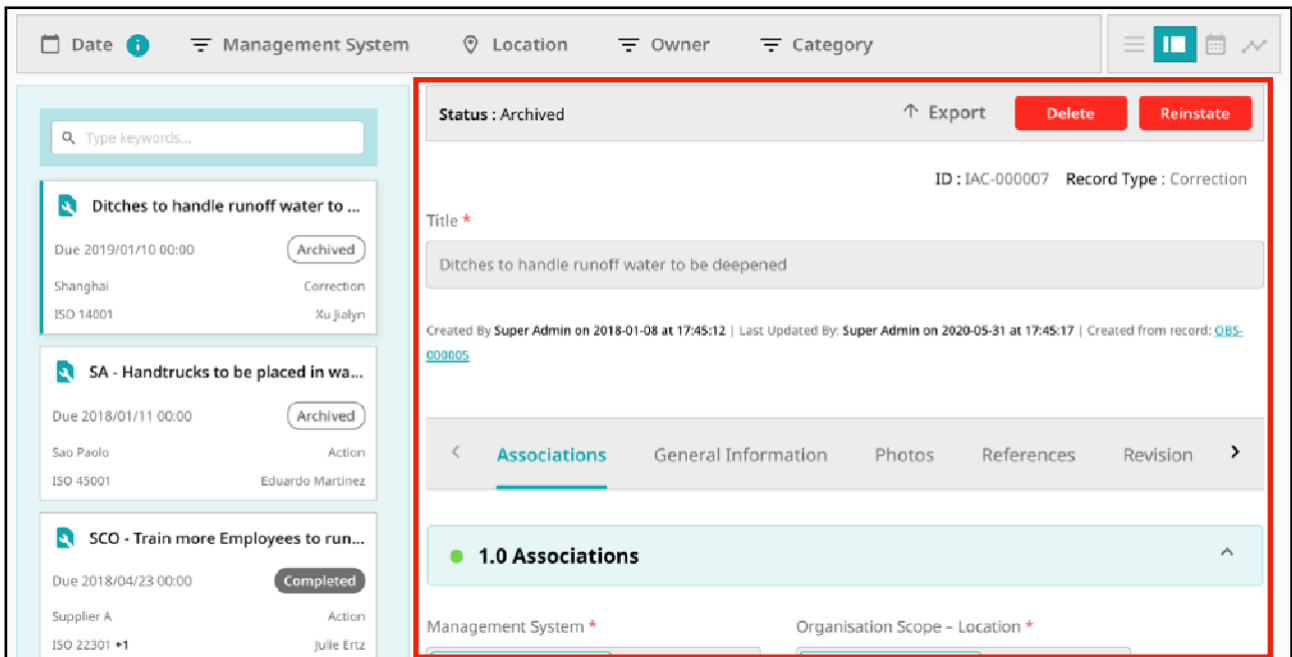


Fig. 9

Edit the record using the screen on the right (highlighted [fig.9]).

Next to the card view button, is the  button - the calendar view button.

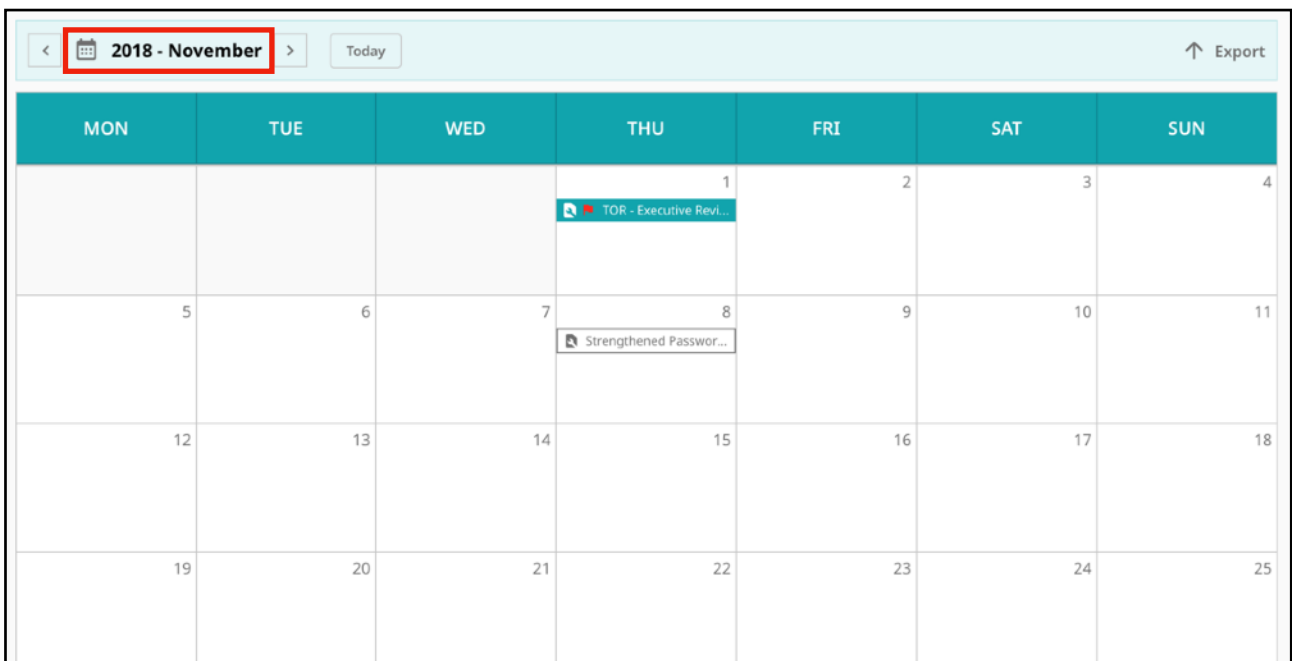




Fig. 10

Like the list and card views, you can filter using the advanced, column and quick filters. Remember that any filters used in one view will affect the records shown in another.


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


At the top right of the calendar view, you can click the  button to export the calendar as an Excel spreadsheet.

At the top left, you can decide which month you would like to see. Click the  button to see the current month.

To change the year and month, click the arrows either side of the text (highlighted [\[fig.10\]](#)) to see chronologically linear months.

You can also click on the text (highlighted [\[fig.10\]](#)) to produce a drop-down menu, where you can select a year and a month.

Next to the calendar view button is the  button. This is the chart view button. Like the other views, you can filter the records shown.

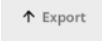
Click the  button in the top right corner of each graph to download it as a .png or .pdf file.

6.1.6) Configuring the Columns

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



Fig. 11

Type in the search field to return a specific record. Click the  button to export your record list to a .csv file.

Clicking 'group by column' will produce the menu shown on the next page [\[fig.11\]](#).

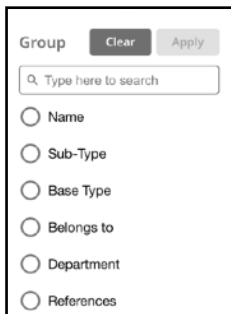


Fig. 12

This allows you to group specific records together.

You can search for a specific option by typing in the 'type here to search' field and clicking the magnifying glass. Some records have many columns available for display.

To clear a grouping, click the **Clear grouping** button.

It will appear next to the advanced filter button when you have groupings 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.

6.1.7) Filtering the records using the Column Headers




Fig. 13

Columns can be sorted or filtered. Click the  button to sort.

Sorting is either ascending, descending or inactive. 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 boundaries between the column headings, you can make the column wider or narrower. Click the  button to filter the records according to each column.

Remember, to clear any filters applied, click the  button in top right corner of the screen.


6.1.8) Using the record list

Below the filters is the record list. If you hover over a record, you have the option to add a date to an external calendar.


Click the  button. Then select which date you'd like to export, and then an external calendar.

Ditches to hand...	Archived	2019-01-10 00:0...	OBS-000005	Wastewater run...	2020-05-31 17:4...	No
SA - Handtruck...	Archived	2018-01-11 00:0...	OFI-000020	Warehouse tea...	 0	 0
SCO - Train mor...	Completed	2018-04-23 00:0...	INV-000010	Vulnerability Sca...	2018-03-14 15:5...	No

Fig. 14

Next to the  button are two icons. These show the number of attachments connected to that record.

The first shows photographs and references. These numbers reflect the number of files associated with the action record.

The  button copies the record.

If you have multiple actions to create, copying the record is useful to pre-populate the associations (e.g. owner, location).

If you scroll to the bottom of the record list, you will see the pagination options [\[fig.15\]](#).




Records per page: 50  1 - 40 of 40 records	 < 1 > 
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Fig. 15

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.

When you log off, your filters will stay applied.

6.2) Creating Actions

To create an action, click on 'actions', and then 'create actions' (highlighted [fig.16]).

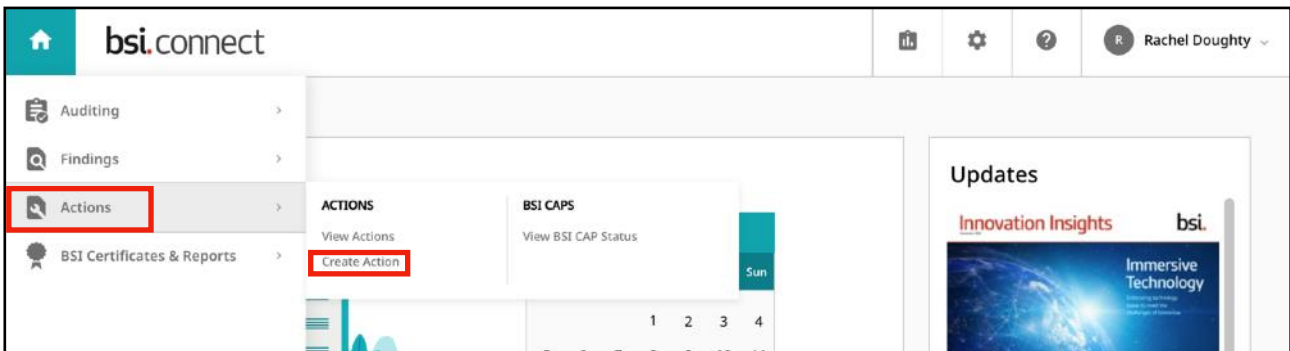


Fig. 16

You can also click the **+ Add new** button from the actions record grid.

The dialog box is titled 'Select Action type' and has 'Cancel' and 'Continue' buttons. It contains three radio button options: 'Corrective Action', 'Correction', and 'Action'.

Fig. 17

Choose an action type from the list.

A **correction** is an action to eliminate a detected nonconformity.

A **corrective action** is an action to eliminate the cause of a nonconformity.

An **action** allows you to create an Action.

On the action creation page, every field that is mandatory has a * next to it. Fill these fields in, starting with the title.

Fig. 18



In the associations section, 'management system', 'location', 'action type' and 'owner' are mandatory. Use the  button and the  buttons to input data.




Fig. 19

For the description, type the relevant information into the field. Use the formatting tools [\[fig.19\]](#) to assist you.

Complete the 'Start Date' and the 'Due Date'.

For 'Priority', click the  button to select an option.

You can add a photo as supplementary evidence - this is optional. Click  to open your computer's file menu.

You can attach any files that are relevant to this action in the 'references' section [\[fig.20\]](#). Click the relevant button. 'Upload file' brings up your computer's files menu. 'Add URL' allows you to type a web address. 'System Record' allows you to associate another BSI Connect Plus record.

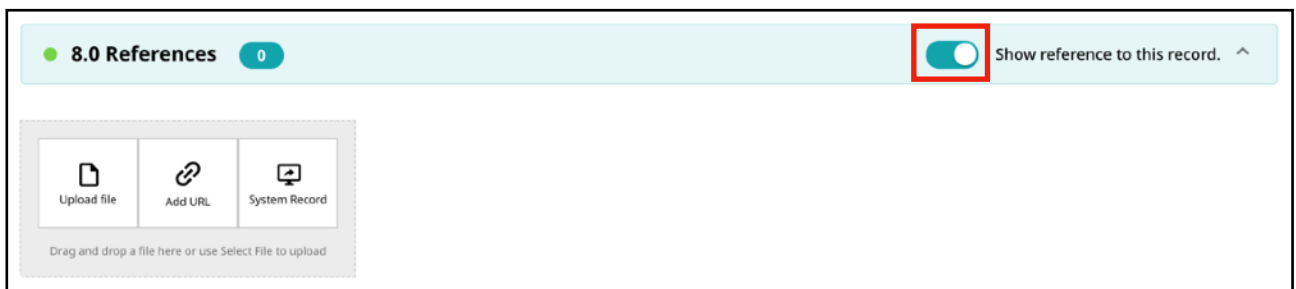


Fig. 20

When the switch (highlighted in red [fig.20]) is on, this will list any other system records that reference this action in their own references.

Below, the revision history shows when the action was edited and by whom.

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

5.3) Action Statuses

Once you click the **Create** button, the finding transitions to the 'draft' status.

You can edit the record and click the **Save** button.

If you click the **Activate** button, your action becomes 'active'. The transition options will then change at the top of the action.

You can either click the **Not Implemented** button to transition the action to 'not implemented'.

Alternatively, you can click the **Complete** button to transition the action to 'completed'.

Once you have completed the action, no fields can be edited. The transition options will then change, allowing you to transition the action to 'archived'. The status workflow for Actions is shown below [fig.21].

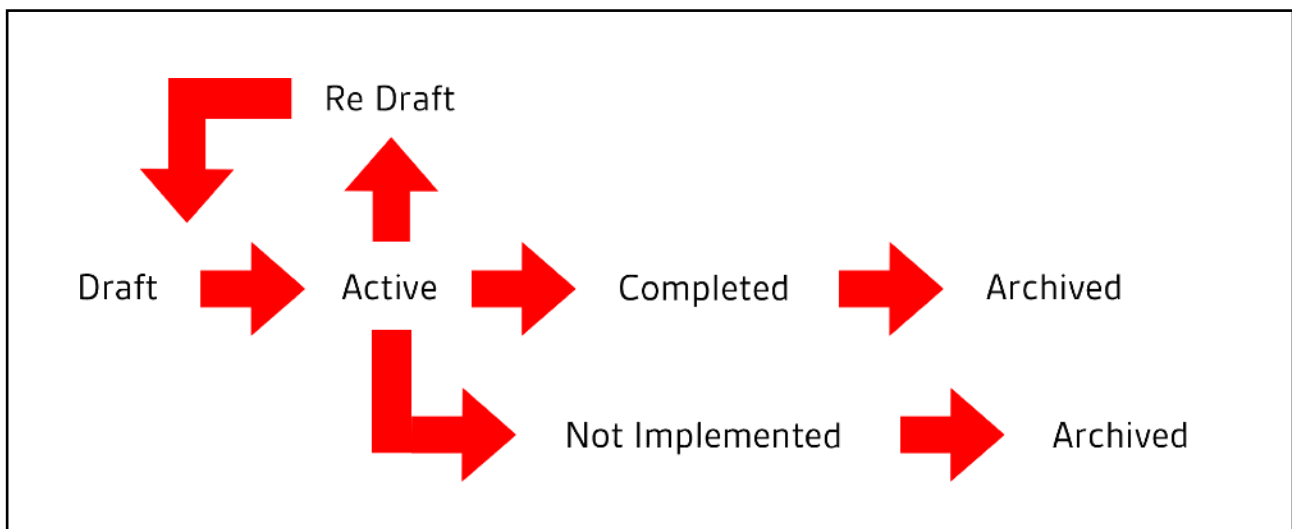


Fig. 21