NHS
Business Services Authority

Compass Guidance

September 2021

Compass Guidance – September 2021

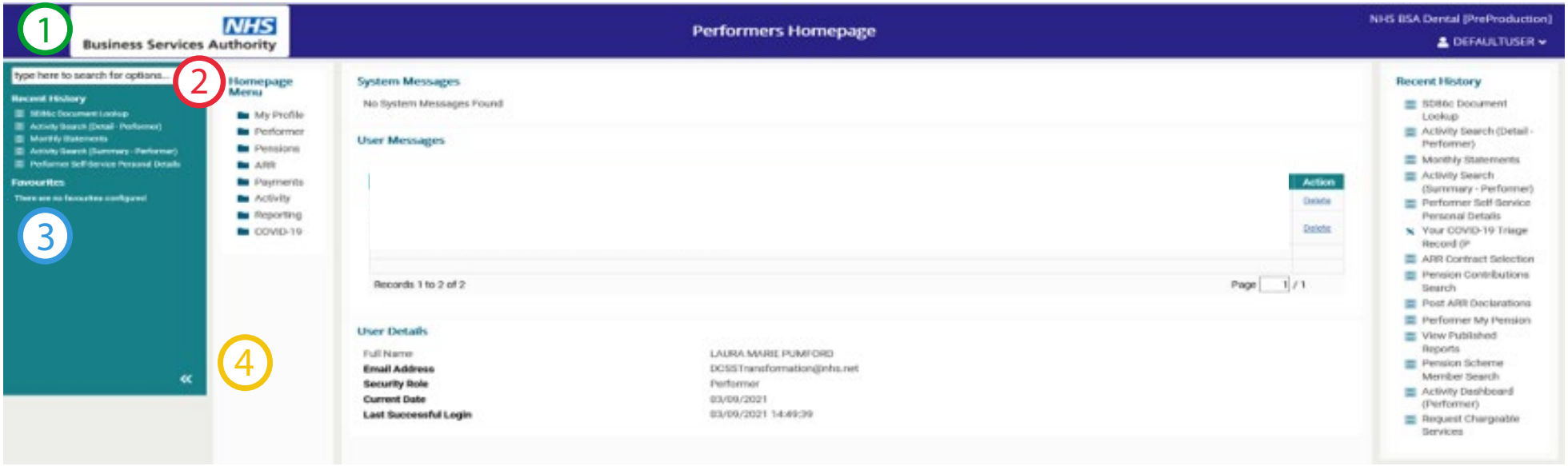
Compass is scheduled to be upgraded on Monday 11 October 2021 and will include some additional features, as well as a brand-new look. Please note that, although the overall appearance of Compass has been changed, the functionality has not.

Based on your feedback, we're introducing the following new features that will improve the usability and navigation of Compass:

- Compass homepage button
- ability to pin or unpin the taskbar
- search bar – this will allow you to search for screens using keywords
- favourites folder - this will allow you to bookmark the functionalities you use the most

Some of the existing Compass icons also have a refreshed look.

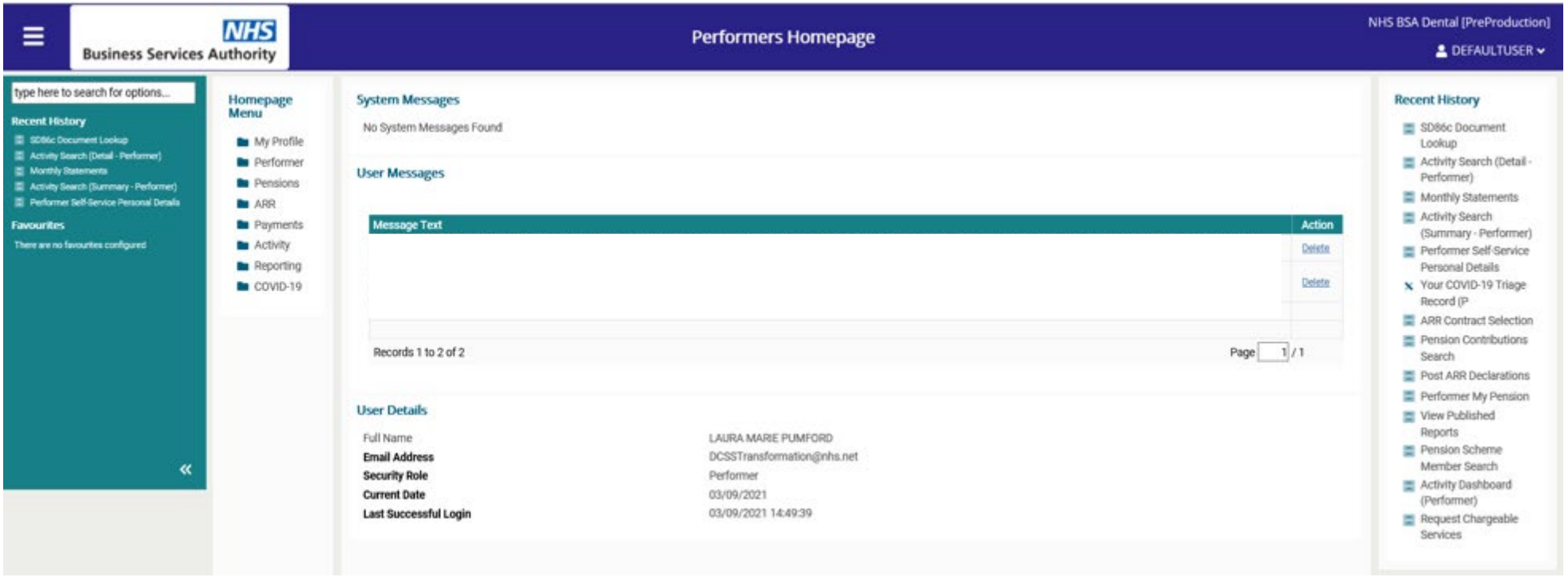
Overview of new features



1. Return to homepage button
2. Search bar function
3. Favourites folder
4. You can pin/ unpin this task bar to display a full screen

Homepage button

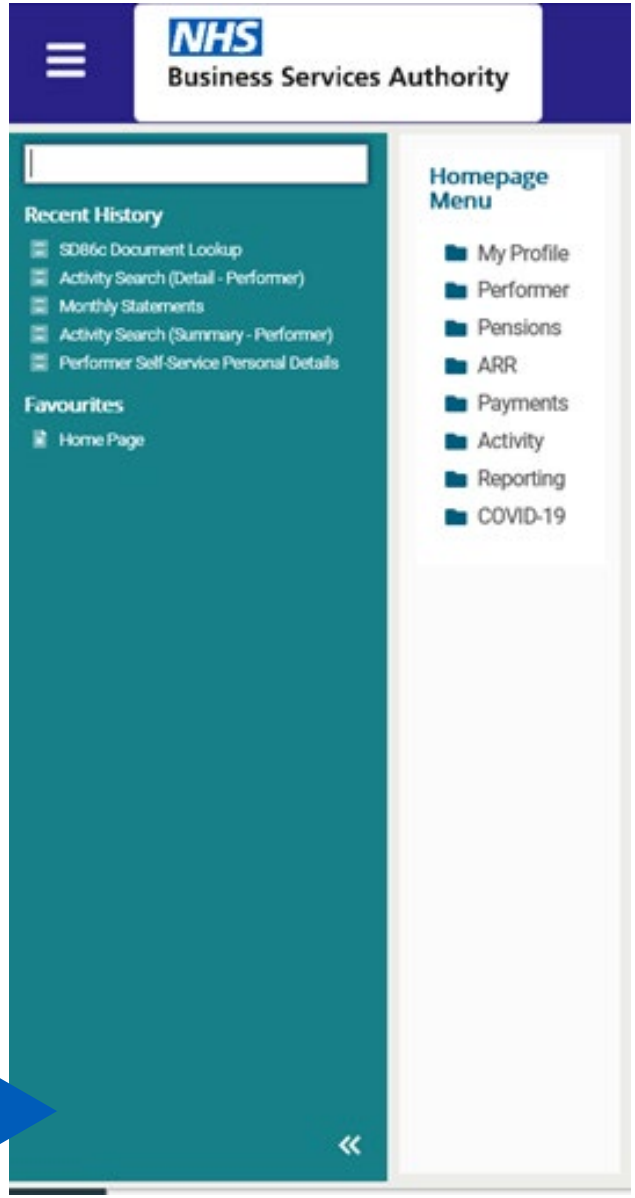
Click on the NHS Business Services Authority logo to return to the Compass homepage.



On the homepage, your recent history will remain on the right-hand side, as well as now being added to the left-hand side of the page.

The homepage menu will remain on the left-hand side of the of the webpage and all other functionalities will also remain the same.

Pin or unpin the taskbar



Use the arrow icon to pin or unpin the taskbar.
Pinning the taskbar will allow you to see:

- the search bar
- your recent history
- favourites folder

Unpinning the taskbar will allow you to see the full screen.

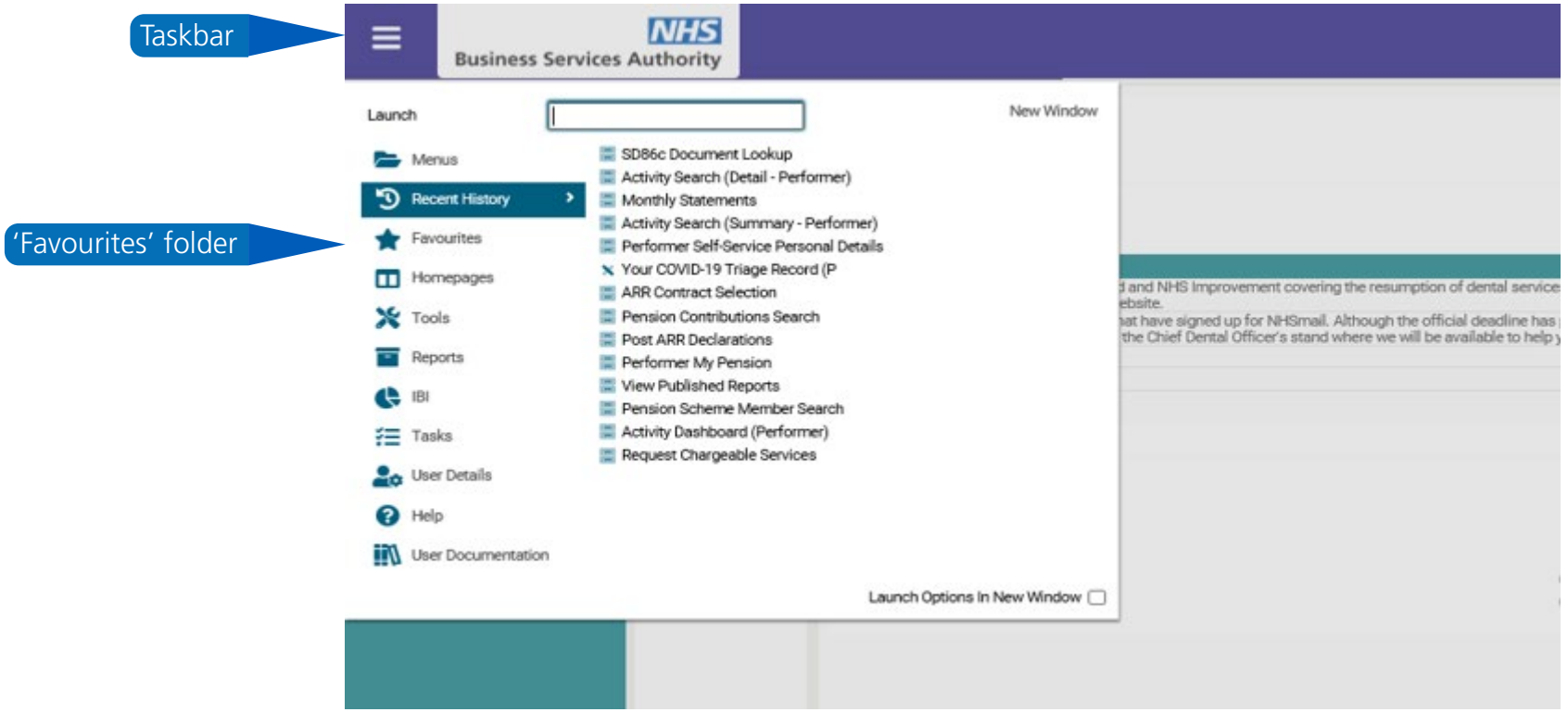
Search bar

Pin the taskbar so you can see the search bar at the top left of the screen.

Enter keywords into the search bar to find the function you're looking for. There is also an additional 'Quick Launch' search bar that can be located by pressing the pin and unpin arrow.

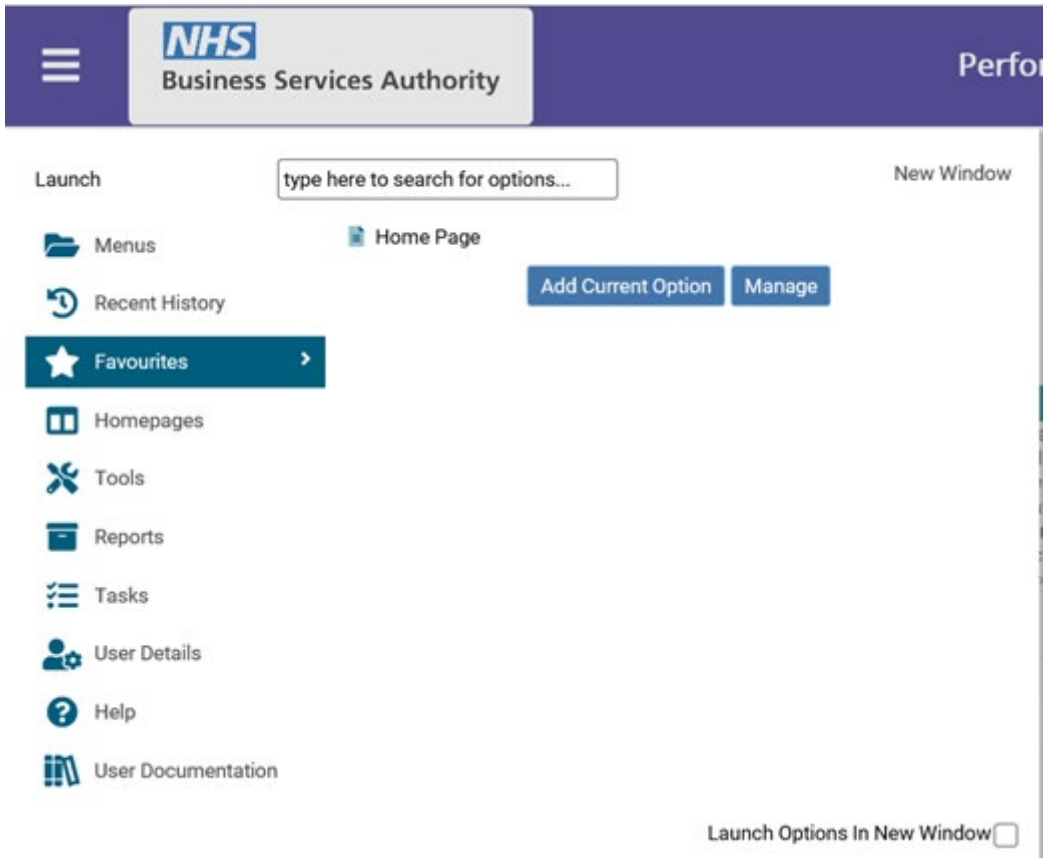
Favourites folder

To add a function to your favourites folder, pin the task bar so you can see the search box. Search for the function you want to add to your favourites folder by entering keywords and then select the option you want to save. Once on this page select the 'Favourites' folder from the task bar menu.



Favourites folder (continued)

In the favourites folder, select ‘Add current option’. This will add the function to your favourites folder. Selecting ‘Manage’ will allow you to organise and edit your favourites.



Compass icons

Some of the existing icons in Compass also have a refreshed look. As a reminder, here's what the icons mean:

Folder - a menu item that can be expanded

Filing cabinet – search and amend functionalities

Graph – run a report/query

Remember - although the overall appearance has been changed, the functionality of the platform has not.

We hope that this guide has been helpful, however if you require further guidance, please visit the **Compass Page** on our website. For any queries, please contact
nhsbsa.dentalservices@nhsbsa.nhs.net.