Knowledge User Guide

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Contents

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1. Introduction

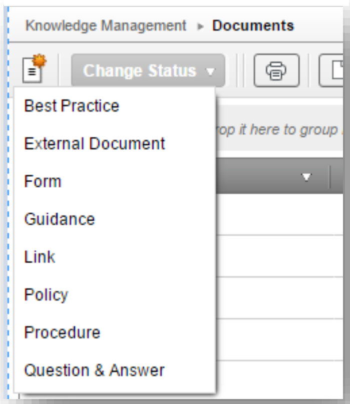
Entropy's Knowledge module will enable you to store your Organisations documentation, schedule your legislation and regulation requirements, publish and track training activities, create meetings storing your agendas, minutes and actions in once central location and schedule your assets/equipment for inspection/calibration.

2. Documents

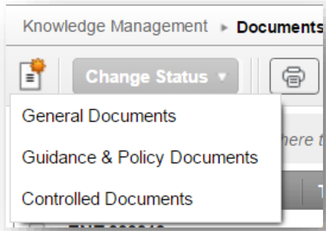
2.1 Types of Documents

Entropy has various document types which can be renamed or withdrawn from view. Your view may differ from the examples below (to see which document types you have available click Knowledge > Documents > Create):

Default document list



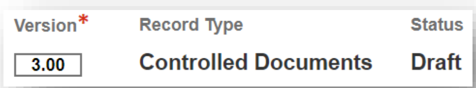
Edited record list with hidden types and renamed types



The following instructions will focus on how to create and publish a procedure.

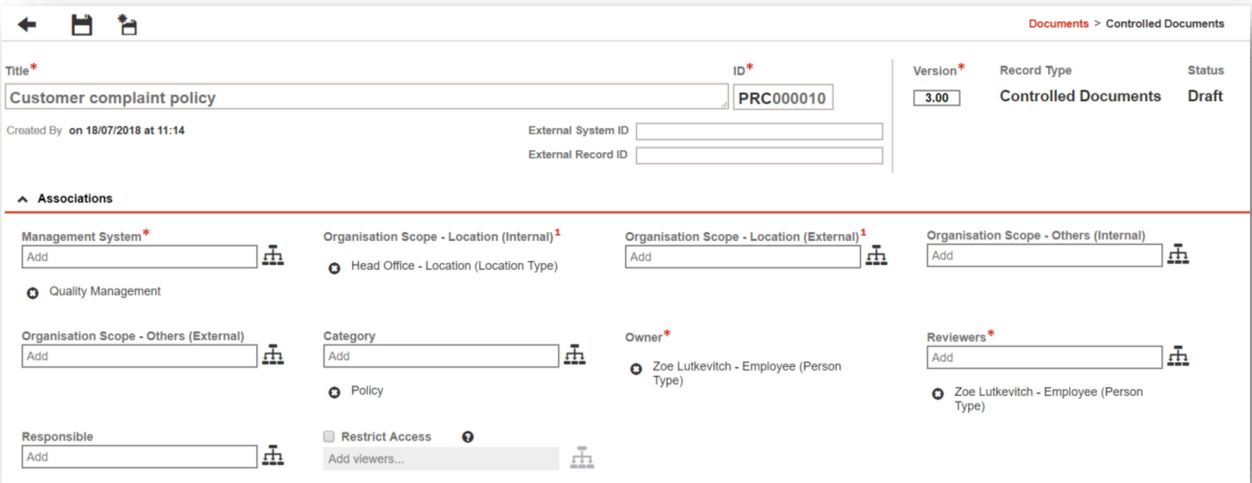
2.2 Creating a Procedure

1) Navigate to **Knowledge** > **Documents**
2) Click on the **Create** button 
3) Select **Procedure** (this may have been renamed to 'Controlled Documents')
4) Enter the name of your document in the **Title** field
5) You can change the version of the Entropy record by overtyping the version number in the **Version** field – please note this can only be done whilst the document is in initial draft



6) In the **Associations** section complete the following:

- **Management System** - use the tree picker/type directly into the field to select the Management System(s) you want to associate with your record
- **Organisation Scope – Location (Internal)** – use the tree picker/type directly into the field to select the location you want to associate with your record
- **Organisation Scope – Location (External)** - use the tree picker/type directly into the field to select the customer/supplier you want to associate with your record (optional field)
- **Organisation Scope – Others (Internal)** – use the tree picker/type directly into the field to select organisation scope i.e. departments/processes that you may want to associate with your record (optional field)
- **Organisation Scope – Others (External)** – not required
- **Category** – use the tree picker/type directly into the field to select the categories you want to associate with your record (this field could be mandatory or optional depending on how it has been set up in the workflow)
- **Owner –** use the tree picker/type directly into the field to assign an owner to this record
- **Reviewers** – use the tree picker/type directly into the field to assign reviewer(s). The reviewers role is to review and accept or reject the document and any subsequent updates/changes
- **Responsible** - use the tree picker/type directly into the field to add any users you want to make aware of this document i.e. tell joe blogs when the document is published
- **Restricted Access Group** – this field restricts who has access to the record. This should only be used if the information in the record is sensitive or confidential. Using the picker select the individual(s) that you want to include in the Restricted Access Group from the Organisational Unit tree (optional field)



7) You have three options for adding your document content into Entropy. You can 'embed' the document into the **Details** field, add the document as an attachment (click here for instructions on how to attach your document) or create a link to another record/document within the Entropy system (click here for instructions on how to create a system record link)

2.2.1 Embedding Document into Entropy

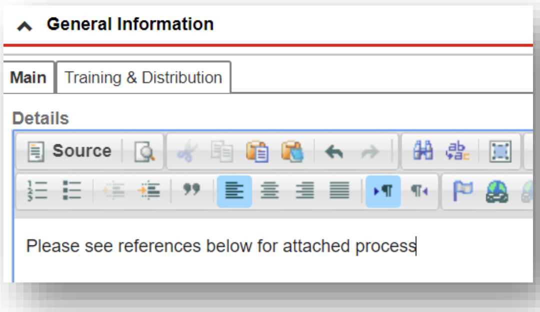
1) Click in the **Details** section. Here you can type, copy and paste or import the contents of your document directly into the details area.

2) To import the information directly from another word document click the import icon , browse for the location of the .docx file, once located click OK to import

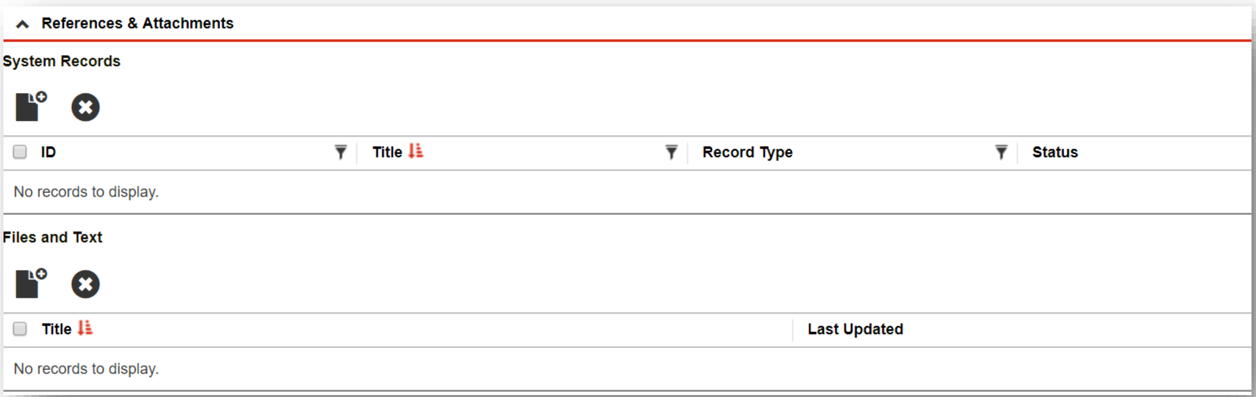
> **Note:** Entropy has limited word processing functionality and therefore will not handle the embedding of documentation that has complex formatting, workflow, tables etc. If your documentation fits any of those examples we would recommend you attach your documents into Entropy to retain all formatting

2.2.2 Attaching your Document into Entropy

1) If you are going to attach your document into Entropy, it is always useful to make reference to this in the **Details** section



2) Before attaching a record into Entropy you are first required to click **Save**
3) Locate the **References& Attachments** section towards the bottom of the record



4) Under **Files and Text** click create to upload a new file
5) Click **Browse** and locate the document you wish to upload on your computer, click **Open**
6) Enter the name of your attachment in the **Title** field.
7) Click the symbol to upload the file and click **OK**

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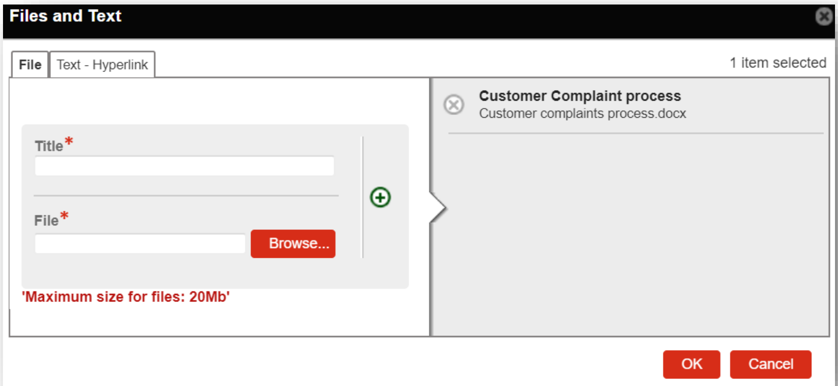
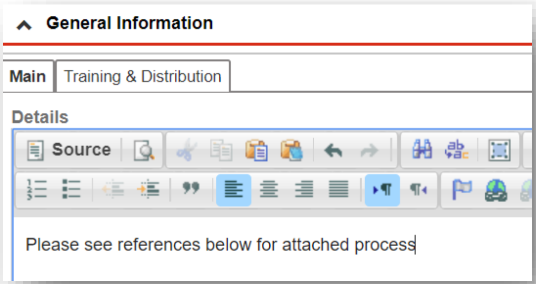


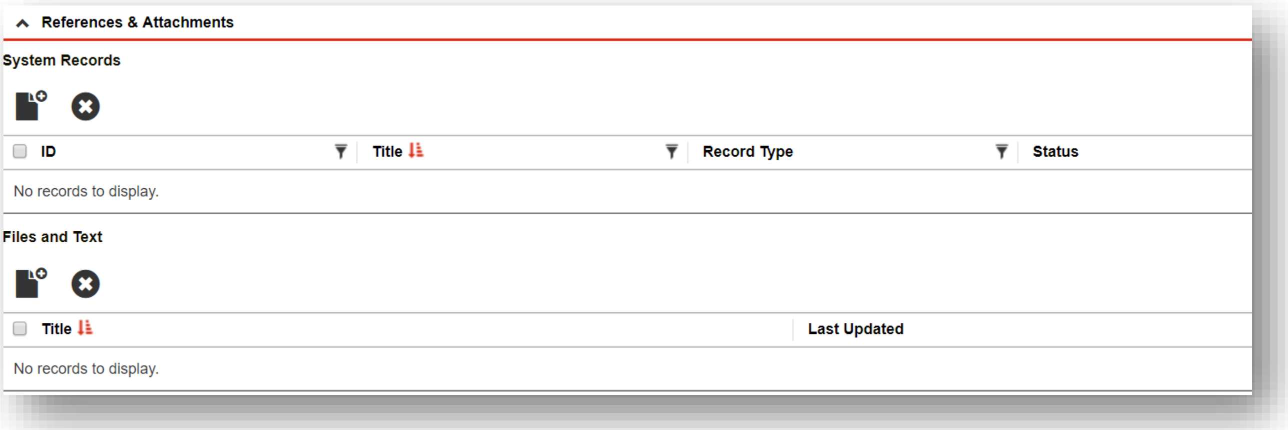
8) Repeat steps 5 – 7 to add additional attachments to the record
9) The attachment will look similar to the following example:

2.2.3 Creating a system record link

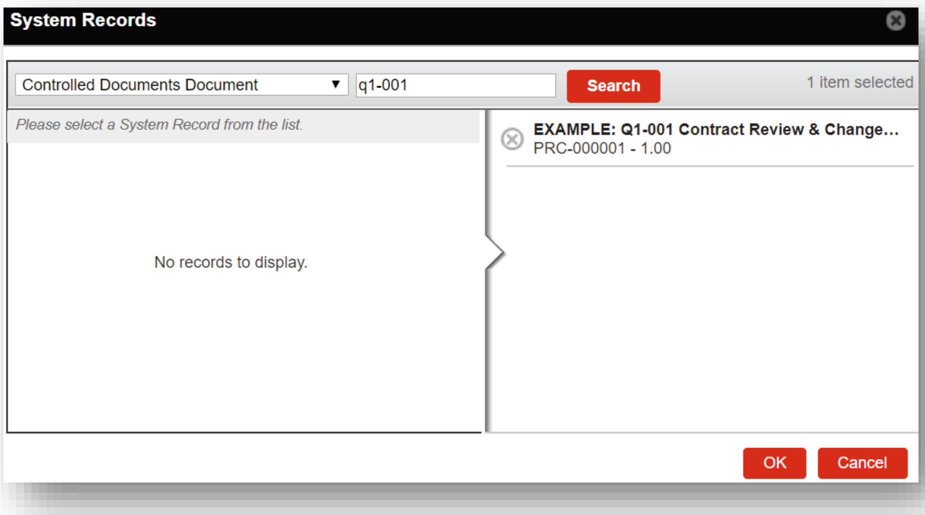
1) If you are going to link to another document/record within Entropy, it is always useful to make reference to this in the **Details** section



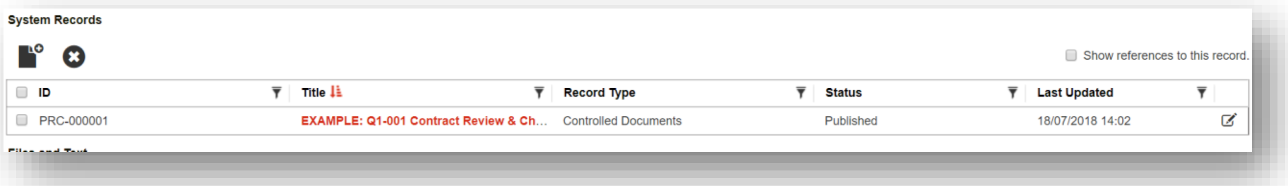
2) Before linking to a record into Entropy you are first required to click **Save**
3) Locate the **References& Attachments** section towards the bottom of the record



4) Under **System Records** click create
5) Using the drop down, select the record type that you are linking to
6) In the search box, type part or the whole title of the record you are linking to
7) Select **Search**
8) Click the plus symbol to select followed by **OK**



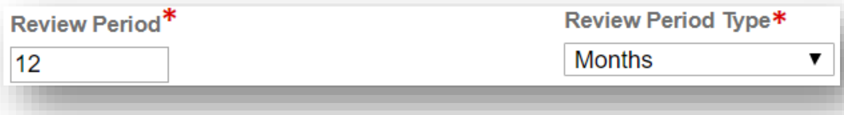
9) The record link will look similar to the following example:



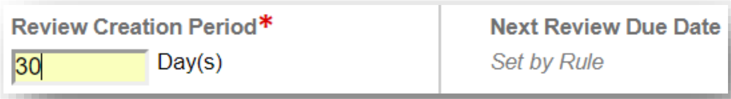
2.2.4 Periodic Review of Document

Periodic review of a procedure/policy/controlled document is an optional setting in the workflow (it is normally enabled by default).

1) In the **Publication Rules** section add your **Review Period** and **Review Period Type** e.g. every 12 months



2) In the **Review Creation Period** field, add the number of days ahead of the review due date that you would like to create the review record

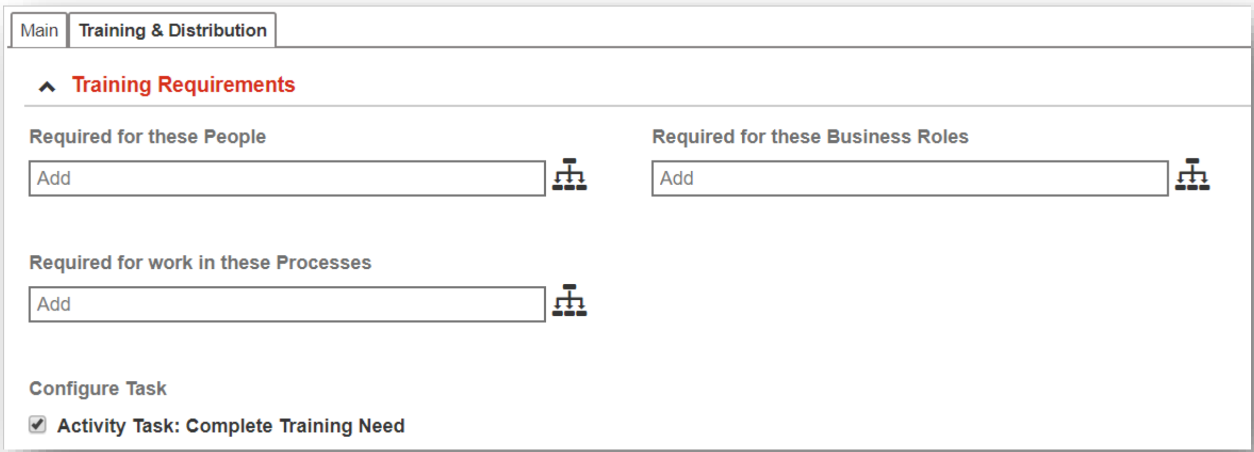


3) The periodic review takes place x days/months/years from the date of the record/document creation in Entropy

2.2.5 Allocating a 'Training Need' to a Document

A training need can be created during document creation or once the document is published

1) If you need to record that people in your organisation have read this document, click the **Training & Distribution** tab



2) In this section you are able to add non-users and users via the **Required for these People** field or via business roles within the **Required for these Business Roles** field, if you have them set up (i.e. groups of users such as 'First Aid' group).

3) Select the people or business roles as required, then click the **Main** tab to return to the main record
4) For instructions on how to update a training record to acknowledge a document has been read click here

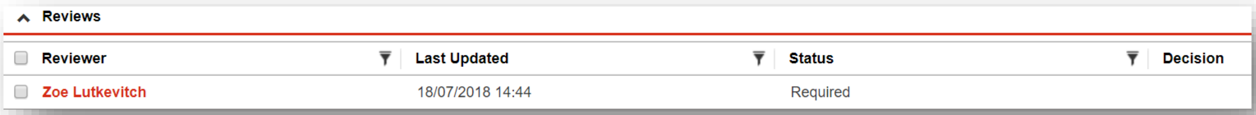
2.2.6 Submitting a Document for initial Review/Approval

1) When you are satisfied that the record is ready for review, click the **Submit for Approval** button followed by **OK**

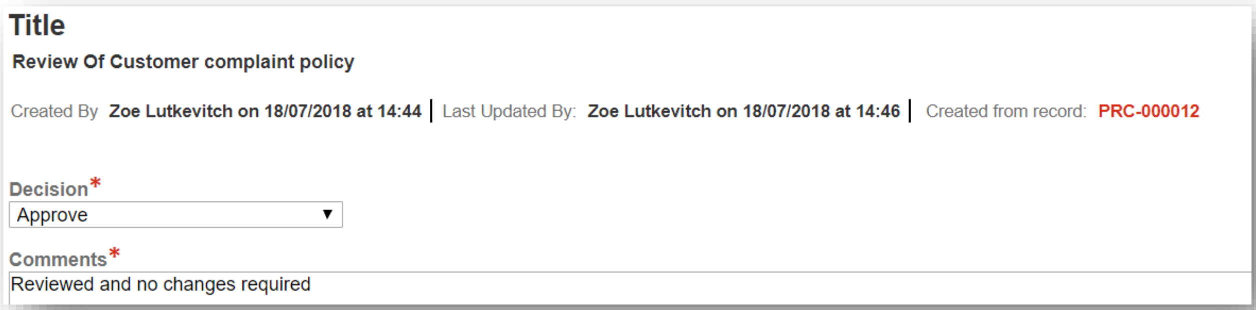
> **Note:** Reviewers will receive an e-mail if a notification rule has been configured. A task will also be sent to the reviewers. The status of the procedure will now show **'Draft Under Review'**

2.3 Reviewing/Approving a Document

1) A document can have a single reviewer or multiple reviewers. All must agree that the document decision is 'approved' before the document can be published
2) To review the document follow the link from your notification email or click your **Tasks** in the top right corner of the Entropy screen
3) Before starting the review, check you are happy with the contents of the document
4) In the **Reviews** section click on your name to begin the review



5) Click **Start** and click **OK**
6) Select **Approve** or **Reject** from the **Decision** drop down and add comments to the **Comments** field



> **Note:** It is mandatory to add comments regardless if you approve or reject the document

7) Click the **Complete** and **OK** to complete your review

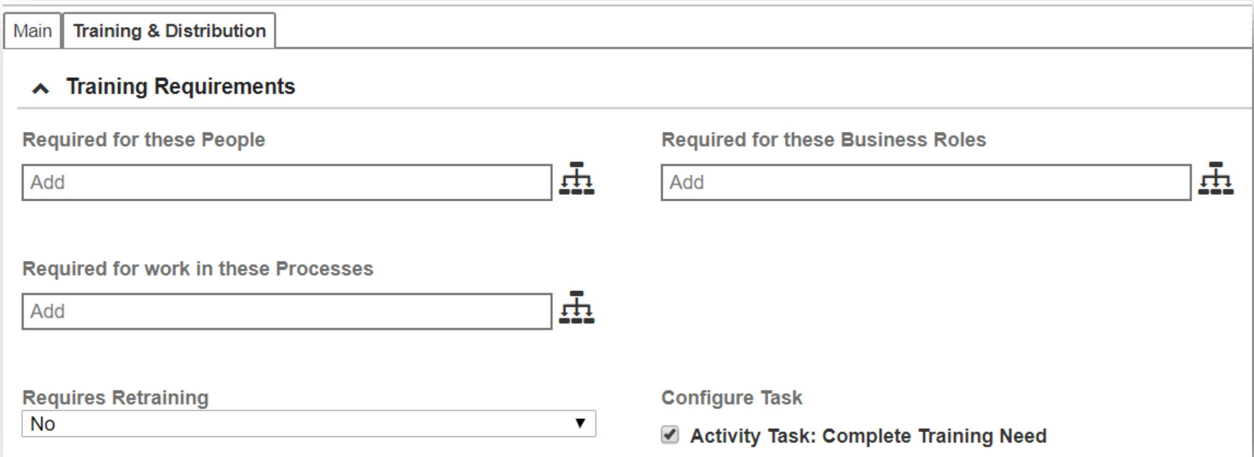
8) Depending on the publishing rules, a procedure can be automatically published when the final review is approved, or it can be manually published by the owner when all the reviews are approved.

2.4 Editing a Published Document

1) To update a published document, click **New Version** and select either **Minor** or **Major** depending on the scope of the update.

> **Note:** A Major change increases the version by whole numbers e.g. 2.00; minor changes are increased by decimals e.g. 1.02

2) Add a **Version Description** to indicate the changes to the document
3) If you content is embedded into the document within the Details section, make any required changes to the text
4) If you have attached your content, go to the **References & Attachments** section. Upload your new attachment, remembering to delete the existing attachment (if it's being superseded).
5) Next, go to the **Training & Distribution** tab. Select **Yes** or **No** from the **Requires Retraining** dropdown



6) Select the **Main** tab and click **Submit for Approval**
7) The **Review/Approval** process will now begin again as per the previous section instructions

2.5 Document Reporting

There is an inbuilt document report to assist you with managing your document review dates

2.5.1 Policy and Procedure Review Due Date Report

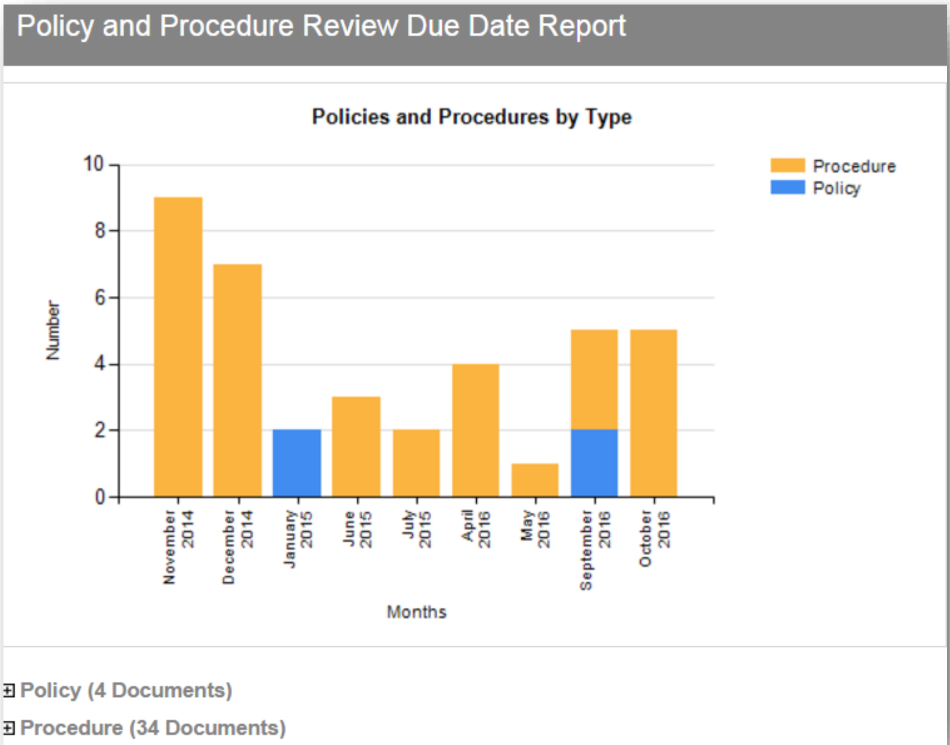
1) Navigate to **Knowledge,** select **Reports**. Alternatively click the report icon on the menu bar
2) Locate **Policy and Procedure Review Due Date Report** (if you do not have access to reports, contact your system administrator who can enable this for you)

3) You can group your data by selecting **Group by** within the **Grouping and Sorting** section

4) There are a number of **Filters** that will enable you to search and interrogate your data, for example you may want to see all documents due for review for a particular owner and due date

5) Once you have chosen your filters click **Run**

6) The following report is grouped by **Document Type**. Clicking on the plus symbol will expand the reporting details



7) The report can be exported to Excel or PDF by clicking the export icon and selecting your preferred output format

3. Legal Register

Use Entropy's Legal Register to manage your organisation's legislation, permits or regulations.

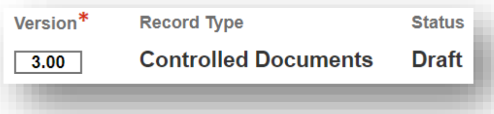
1) Navigate to **Knowledge** and select **Legal Register** from the drop down menu

2) Click create

3) Select either **Legislation**, **Permit** or **Regulation** from the drop down menu

4) Click the **Title** field and enter a brief and meaningful summary for your Legislation, Permit or Regulation

5) You can change the version of the Entropy record by overtyping the version number in the **Version** field – please note this can only be done whilst the document is in initial draft



6) GOT TO HERE – CHECK LEG-1, IS IT THE OWNER OR REVIEWER WHO GETS THE PERIODIC REVIEW TASK

7) In the **Associations** section complete the following:

- **Management System** - use the tree picker/type directly into the field to select the Management System(s) you want to associate with your record
- **Organisation Scope – Location (Internal)** – use the tree picker/type directly into the field to select the location you want to associate with your record
- **Organisation Scope – Location (External)** - use the tree picker/type directly into the field to select the customer/supplier you want to associate with your record (optional field)
- **Organisation Scope – Others (Internal)** – use the tree picker/type directly into the field to select organisation scope i.e. departments/processes that you may want to associate with your record (optional field)
- **Organisation Scope – Others (External)** – not required
- **Category** – use the tree picker/type directly into the field to select the categories you want to associate with your record (this field could be mandatory or optional depending on how it has been set up in the workflow)
- **Owner –** use the tree picker/type directly into the field to assign an owner to this record
- **Reviewers** – use the tree picker/type directly into the field to assign reviewer(s). The reviewers role is to review the record when its flagged by the system for review
- **Responsible** - use the tree picker/type directly into the field to add any users you want to make aware of this record i.e. tell joe blogs if the the
- **Restricted Access Group** – this field restricts who has access to the record. This should only be used if the information in the record is sensitive or confidential. Using the picker select the individual(s) that you want to include in the Restricted Access Group from the Organisational Unit tree (optional field)

8) Click the **Description** field and enter the details of your Legislation, Permit or Regulation

9) Click the **Effective From Date** picker and select the date that the Legislation, Permit or Regulation will come into effect (or was last reviewed)

> **Note**: If you are creating a permit, click the **Effective to Date** picker icon below the Description field and select the date that the permit will come to an end

10) Click the **Tracking Status** drop down menu and select whether you want the legislation or regulation to be tracked or not tracked

Note: Legislation or Regulation can have the status of Tracked or Tracking Complete. A Permit cannot be tracked. A tracked legislation or regulation allows you to flag a pending regulation or legislation

11) Click the **Priority** drop down menu and select the priority level for the Legislation, Permit or Regulation
12) Click the **Legal and Other Requirements** drop down menu and select whether the Legislation, Permit or Regulation has any mandatory requirements or whether it is a guidance
13) Click the **Full Text Location** rich text editor field – add the location of the website you will use to check for updates/information e.g. www.hse.gov.uk
14) Click the **Review Period** field in the Publication Rules section and enter the number of days, months or years before a Legislation, Permit or Regulation is due to be reviewed
15) Click the **Review Period Type** drop down menu and select whether you want to use days, months or years for your review period type
16) In the **Review Creation Period** field, add the number of days ahead of the Review Due Date that you would like to create the review record
17) Click **Save**
18) Click **Submit for Approval,** the status of your Legislation, Permit or Regulation will change to Draft Under Review

Note: Once the record has been submitted for approval it will go to a Reviewer(s) for approval or rejection. A Reviewer(s) will approve the record by first clicking on the task in their tasklist and the approval notification email (if configured). For review instructions see below.

19) If you have chosen to manually Publish your Legislation, Permit or Regulation you will receive a Publish Legislation, Permit or Regulation task in your Tasklist and the publish notification email (if configured).

3.1 Reviewing a Legislation, Permit or Regulation

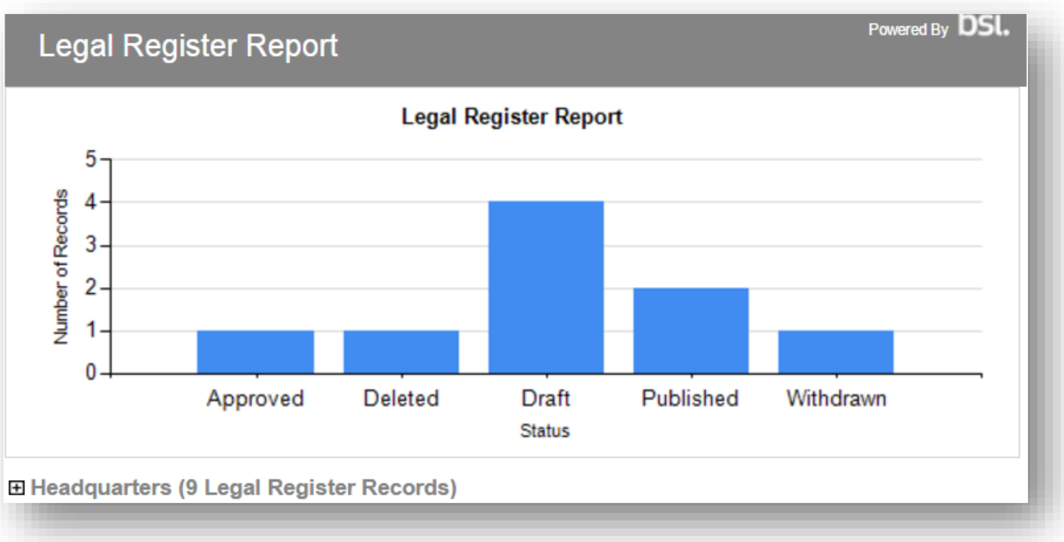
1) Click on the name of the Reviewer in the Reviews section of the Legislation, Permit or Regulation to complete a review of a Legislation, Permit or Regulation
2) Click the **Start** button in the Review toolbar to change the status of your review to In Progress and start the review
3) Select either **Approve** or **Reject** from the Decision drop down menu
4) Click on the **Comments** field and enter a comment regarding your review
5) Click the Complete button to change the status of your review to Completed

3.2 Legislation Reporting

There is an inbuilt report to assist you with managing your Legislation review dates

3.2.1 Legal Register Report

1) Navigate to **Knowledge,** select **Reports** and locate **Legal Register Report** (if you do not have Reports in your Knowledge menu speak to your system administrator who can enable this for you)
2) You can group your data by selecting **Group by** within the **Grouping and Sorting** section
3) There are a number of Filters that will enable you to search and interrogate your data, for example you may want to see all legislation due for review for a particular owner and due date
4) Once you have chosen your filters click **Run**
5) The following report is grouped by **Location** (in the example there is only one location). Clicking on the plus symbol will expand the reporting details



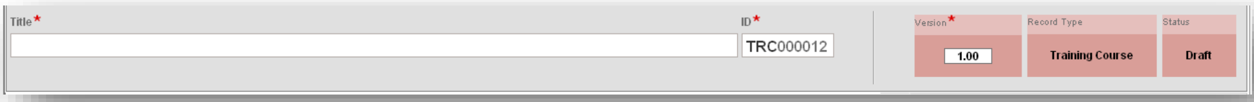
6) The report can be exported to Excel or PDF by clicking the export icon and selecting your preferred output format

4. Training

Entropy can be used to store, track and maintain employees' training records against Procedures and Training Courses.

4.1 Create a Training Course

1) Navigate to Knowledge and select Training Courses
2) Click the **Create** button and enter the name of your course into the title field



3) Enter the Associations:

- **Management System** - use the tree picker to select the Management System(s) you want to associate with your record

Tip: Alternatively, click in the Management System dialogue box and start to type the name of the Management System.

- **Organisation Scope – Location (Internal)** – use the tree picker to select the location you want to associate with your record

Tip: You can remove the default location by clicking the and enter a new location

- **Organisation Scope – Location (External)** - use the tree picker to select the customer/supplier you want to associate with your record (optional field)

- **Organisation Scope – Others (Internal)** – use the tree picker to select organisation scope i.e. departments/processes that you may want to associate with your record (optional field)

- **Organisation Scope – Others (External)** – not required

- **Category** – use the tree picker to select the categories you want to associate with your record (this field could be mandatory or optional depending on how it has been set up in the workflow)

- **Owner** – use the tree picker to assign an owner to this record

- **Reviewer(s)** – use the tree picker to assign the reviewer(s) to this this record. The reviewers role is to review and accept or reject any updates made to the record

- Click the **Responsible** tree picker and add any users you want to keep updated with this record

- **Restricted Access Group** – this field will restrict who will have access to the record. This should only be used if the information in the record is sensitive or confidential. Using the picker select the individual(s) that you want to include in the Restricted Access Group from the Organisational Unit tree (optional field)

4) Add **Description** of the course as required

5) Click **Training & Distribution** to assign people to the course
6) Select the desired **Refresh Frequency**
7) Enter the **Periodic Review** frequency
8) Click Submit for Approval

> **Note:** Reviewers will receive an e-mail if a notification rule has been configured. A task will also be sent to the reviewers. The status of the Training Course will now show **"Draft Under Review"**

9) Reviewing a Training Course is very similar to reviewing a Procedure, for further information click here
10) Click **Publish** (if set to manual)

4.2 Updating Training Records

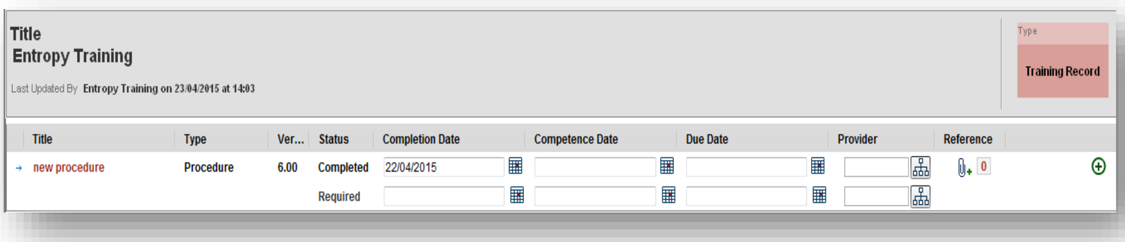
Training records can be updated in two ways. If you wish to update an employee's individual record you can make this change in **Knowledge – Training Records**. If you wish to update a **Training Course** with recent attendees, you can do this in **Knowledge – Training Updates**

4.2.1 Viewing/Updating Training Records

To update an employee's individual record:

1) Navigate to Knowledge and select Training Records
2) Click the **Last Name** of the person whose record you wish to update
3) Enter the Completion Date and Competence Date as required.

> **Note:** The Competence Date is used to document any date where a demonstration of competence has taken place.



4) Click **Save**

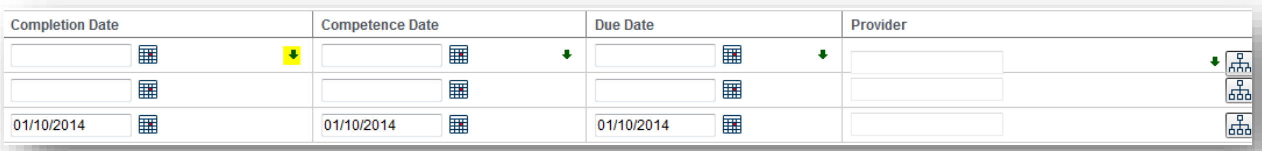
> **Note:** Due date will automatically populate if the course needs to be completed periodically, e.g. every year

4.2.2 View/Update via Course or Document Title (Training Updates)

To update a Training Course or Document

1) Navigate to **Knowledge – Training Updates**
2) Select the **Training Course** or **Procedure**
3) Add the **Completion Date** for the employees you wish to update.

> **Note:** You can update all attendees with the same date by adding the date in the very top Completion Date box and clicking the arrow



4) Click **Save** to update the record

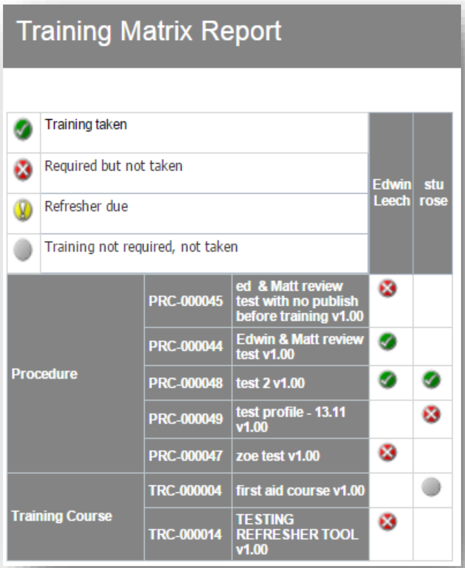
4.3 Training Reports

There are two inbuilt training reports to assist you with managing your organisations training:

- Training Matrix Report
- Training Hours Report

4.3.1 Training Matrix Report

1) Navigate to **Knowledge,** select **Reports** and locate **Training Matrix Report** (if you do not have Reports in your Knowledge menu speak to your system administrator who can enable this for you)
2) Currently there is only one filter in the report (though more are planned for the future)
3) You can run the report for a single person, multi persons or all people
4) The following report example is filtered for two people. The report shows the documents and the training courses split into two sections. There is a key showing what each symbol means



5) The report can be exported to Excel or PDF by clicking the export icon and selecting your preferred output format

4.3.2 Training Hours Report

The training hours report enables you to monitor how many hours have been completed by each person, the table below the bar chart breaks down the location, the persons name, the courses and completed/in-completed hours

5. Management Reviews & Meetings

Entropy's **Management Reviews** schedules the review of one or more of your organisation's management systems, storing your agenda, minutes and actions in one central location.

The **Meetings** tool can be used to schedule any type of meeting held in your organisation and stores your agenda, minutes and actions in one central location.

5.1 Creating a Management Review

1) Navigate to Knowledge and select Management Reviews
2) Click **Create**
3) Enter the **Title** of your Management Review
4) Enter the Associations:

- **Management System** - use the tree picker to select the Management System(s) you want to associate with your record

Tip: Alternatively, click in the Management System dialogue box and start to type the name of the Management System.

- **Organisation Scope – Location (Internal)** – use the tree picker to select the location you want to associate with your record

Tip: You can remove the default location by clicking the ⊗ and enter a new location

- **Organisation Scope – Location (External)** - use the tree picker to select the customer/supplier you want to associate with your record (optional field)

- **Organisation Scope – Others (Internal)** – use the tree picker to select organisation scope i.e. departments/processes that you may want to associate with your record (optional field)

- **Organisation Scope – Others (External)** – not required

- **Category** – use the tree picker to select the categories you want to associate with your record (this field could be mandatory or optional depending on how it has been set up in the workflow)

- **Owner** – use the tree picker to assign an owner to this record

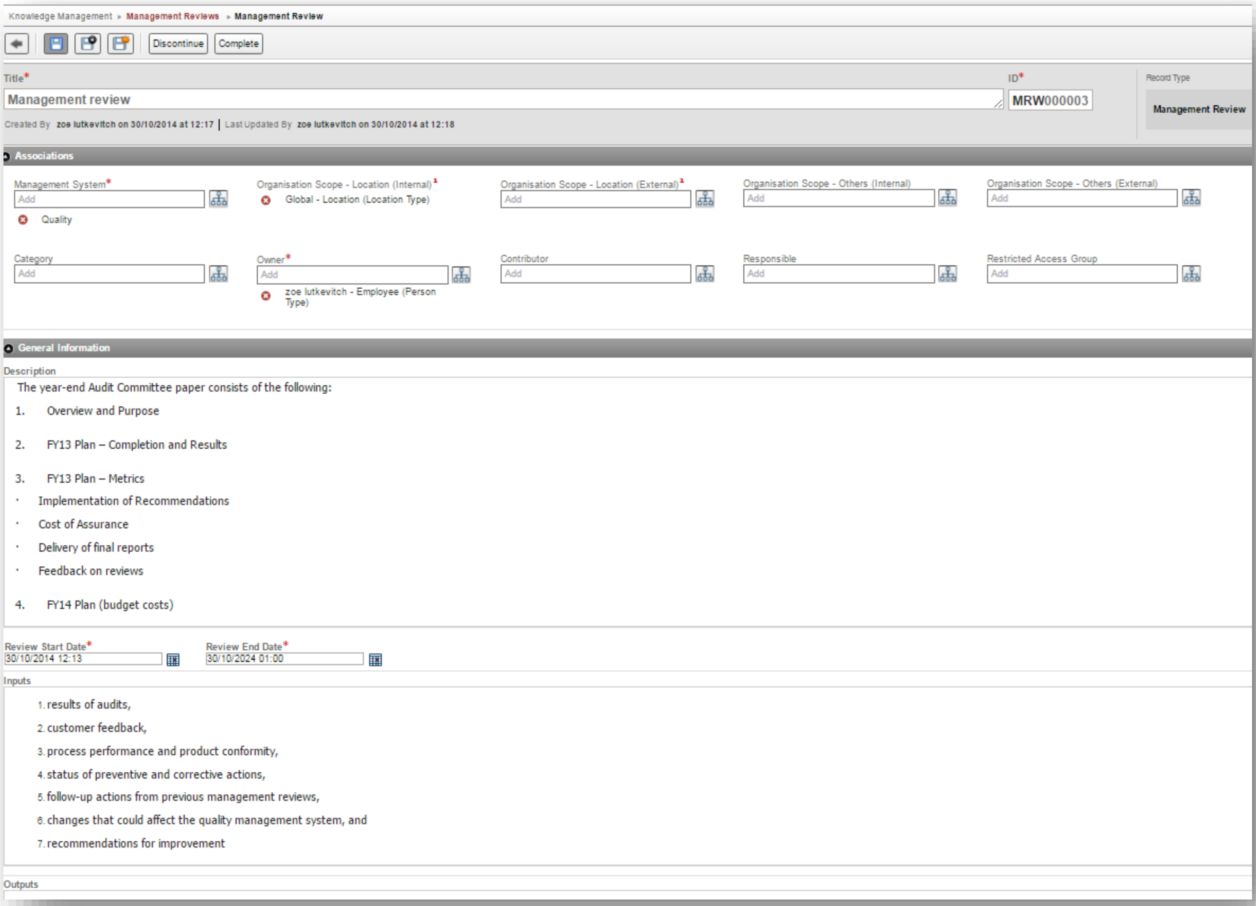
- **Contributor(s)** – use the tree picker to assign anyone who contributes to the Management Review meeting

- Click the **Responsible** tree picker and add any users you want to keep updated with this record

- **Restricted Access Group** – this field will restrict who will have access to the record. This should only be used if the information in the record is sensitive or confidential. Using the picker select the individual(s) that you want to include in the Restricted Access Group from the Organisational Unit tree (optional field)

5) Add **Description** (details) of the Management Review meeting
6) Click on the **Review Start Date** picker and select the start date of Management Review period.
7) Click on the Review End Date picker and select the end of the Management Review period. Example, your management review might run from 01/01/2016 – 31/12/2016, these will be your start and end dates.
8) Click the **Inputs** field and enter any information relevant to the contributions, involvements into your Management Review

9) Click the **Outputs** field and enter any goals or outcomes you expect from your Management Review



10) Click **Save** followed by **Activate**. Activating the record will allow you to now add **Meetings** to the Management Review, for example you might have a Management Review called 'QMS 2016' and within that review are a number of meetings that feed into the Management Review process.

5.2 Creating a Meeting

A meeting can be either created directly from the meetings tool or it can be created from within a Management Review, instructions for both are below:

1) If you are creating the meeting from within a Management Review record, go to the section **Meetings** (located at the bottom of the record) and click the **Create** icon. Go to step 3
2) If you are creating a standalone meeting navigate to **Knowledge** and select **Meetings.** Go to step 3
3) Click **Create** 
4) Enter the **Title** of your meeting

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5) Enter the Associations:

- **Management System** - use the tree picker to select the Management System(s) you want to associate with your record

Tip: Alternatively, click in the Management System dialogue box and start to type the name of the Management System.

- **Organisation Scope – Location (Internal)** – use the tree picker to select the location you want to associate with your record

Tip: You can remove the default location by clicking the and enter a new location

- **Organisation Scope – Location (External)** - use the tree picker to select the customer/supplier you want to associate with your record (optional field)

- **Organisation Scope – Others (Internal)** – use the tree picker to select organisation scope i.e. departments/processes that you may want to associate with your record (optional field)

- **Organisation Scope – Others (External)** – not required

- **Category** – use the tree picker to select the categories you want to associate with your record (this field could be mandatory or optional depending on how it has been set up in the workflow)

- **Owner** – use the tree picker to assign an owner to this record

- **Contributor(s)** – use the tree picker to assign anyone who contributes to the Management Review meeting

- **Chair Person** – enter the name of the chair person for the meeting.

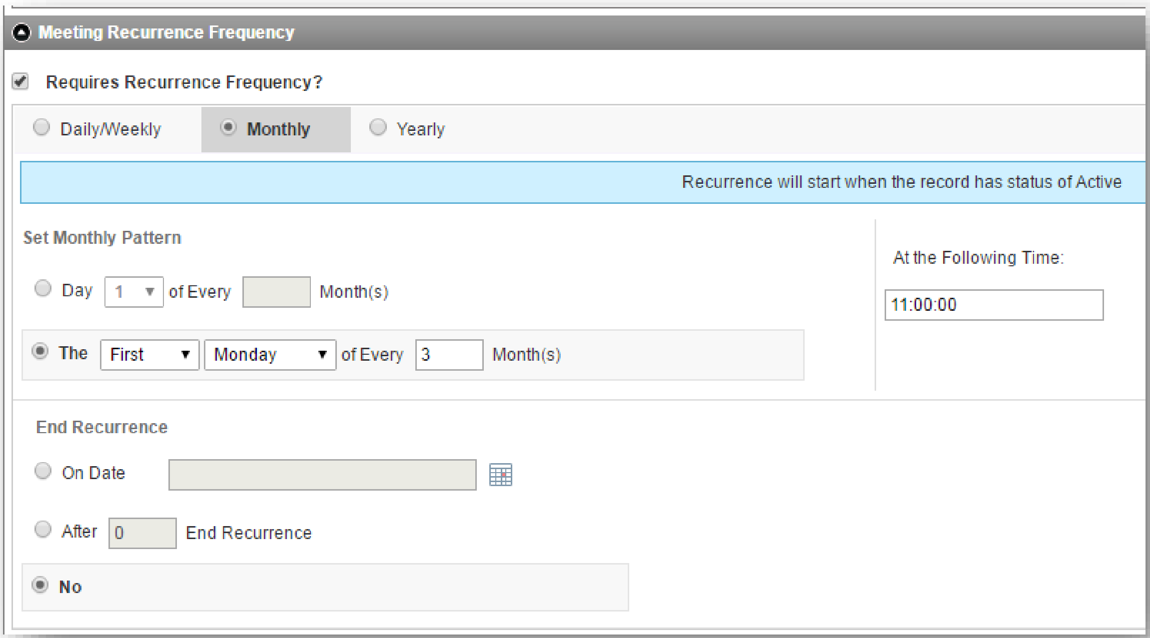
- **Attendees** – these are the Entropy users who will be attending the meeting. An email notification can be configured to notify the attendees of the meeting

-

- **External Attendees Name** & **Email** – non-users of Entropy can be added to the meeting and notified via email (providing the notification has been set up). Click the icon to add additional external attendees

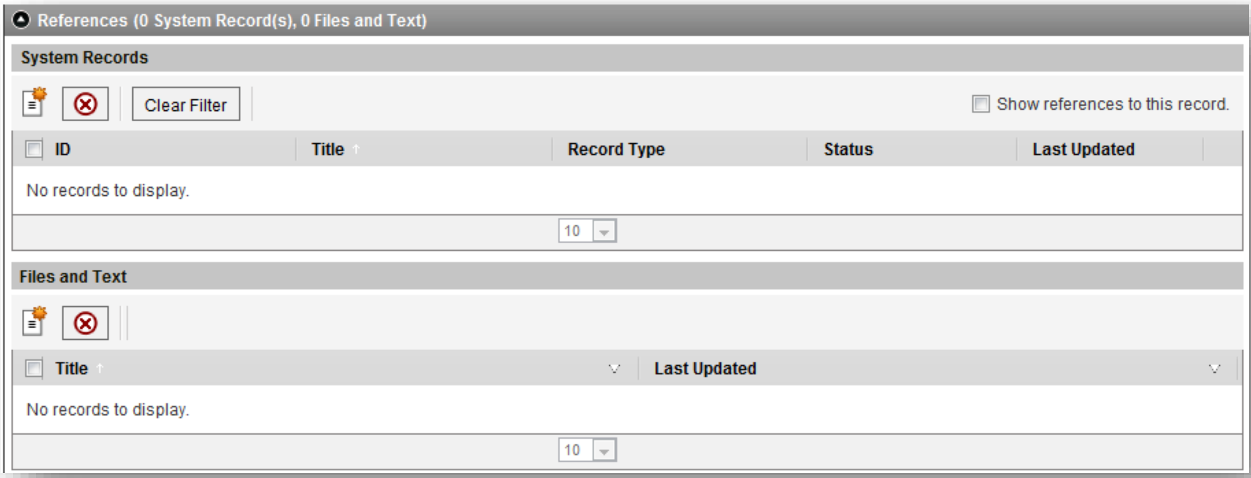
- **Restricted Access Group** – this field will restrict who will have access to the record. This should only be used if the information in the record is sensitive or confidential. Using the picker select the individual(s) that you want to include in the Restricted Access Group from the Organisational Unit tree (optional field)

6) Enter the **Details** of the meeting
7) Enter the **Meeting Date and Time** – if this is a 'one off' meeting put the exact date of the meeting, if that date has passed the meeting will automatically display as 'Taken place' (you can still add minutes and actions to a meeting that has taken place). If it is a recurring meeting put the date of the next meeting in this field, if you want to log information for a meeting that has already taken place back date the date in this field to the date the meeting took place.
8) Enter the meeting **Duration** in minutes/hours
9) Add the agenda items in the **Agenda** field. Alternatively, if your agenda is already created this can be attached as a reference to your meeting record, see item **17** below for more instructions on how to do this
10) If this is a recurring meeting tick the box **Requires Recurrence Frequency?** If not leave it empty
11) If it's a recurring meeting, select the frequency **Daily/Weekly**, **Monthly** or **Yearly**
12) If you select **Daily/Weekly**, you can choose the time, day or week on which a meeting will occur
13) If you select **Monthly**, you can choose which day of the month(s) a meeting will occur
14) If you select **Yearly**, you can choose which day and month a meeting will occur
15) To set a date for the recurrence to end select either an end date using the calendar picker or select to end after a set number of recurrences. If you wish the meeting to continue running leave the default setting **No**



16) Select **Save**

17) If you want to add an attachment to the meeting record navigate to **References & Attachments** (located at the bottom of the record)



18) Under **Files and Text** click **Create** to upload a new file

19) The **Files and Text** screen will appear

20) Enter the name of your in the **Title** field. This is likely to be the same as the name of the Entropy record

21) Click **Browse** and locate the document you wish to upload on your computer

22) Click the symbol to upload the file and repeat if there are multiple files to upload

23) Click **OK** to save the attachments

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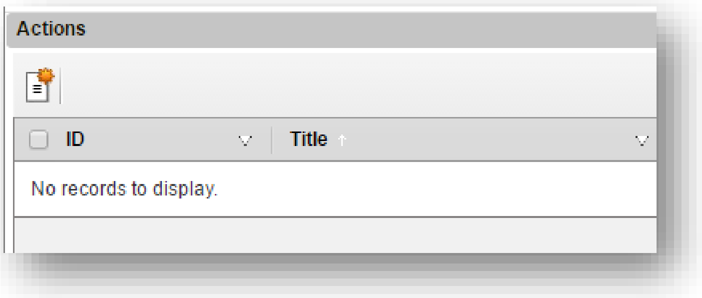
24) Click **Activate** to make the record live, the record status will change to **In Progress**

5.3 Conducting a Meeting

1) Navigate to **Knowledge** and select **Meetings**, locate the meeting that you wish to update
2) If the time of the meeting has passed the status of the meeting will be **Taken Place** and the next meeting will be **Scheduled**

> **Note:** The meeting status changes from Scheduled to Taken Place automatically once the date/time of the meeting has elapsed. If you do not want the meeting status to change to Taken Place then you can extend the date/time of the meeting by simply changing it in the record

3) Click on the meeting date and time hyperlink to open up the meeting
4) There is a section to add the **Meeting Minutes**, alternatively these can be added as an attachment, see previous section for information on how to add attachments
5) You can tick the attendees that were present at the meeting for future reference
6) If any actions came from the meeting, these can be added to the inbuilt Action tracker



7) For instructions on how to create an Action, please refer to Entropy User Guide 3 Section 4

6. Assets

The Entropy Asset tool allows you to create an inspection or calibration schedule for your assets.

6.1 Creating an Asset/Calibration record

1) Navigate to **Knowledge** and select **Assets**
2) Click **Create**
3) Enter the **Title** of your Asset/Inspection
4) Enter the Associations:

- **Management System** - use the tree picker to select the Management System(s) you want to associate with your record

Tip: Alternatively, click in the Management System dialogue box and start to type the name of the Management System.

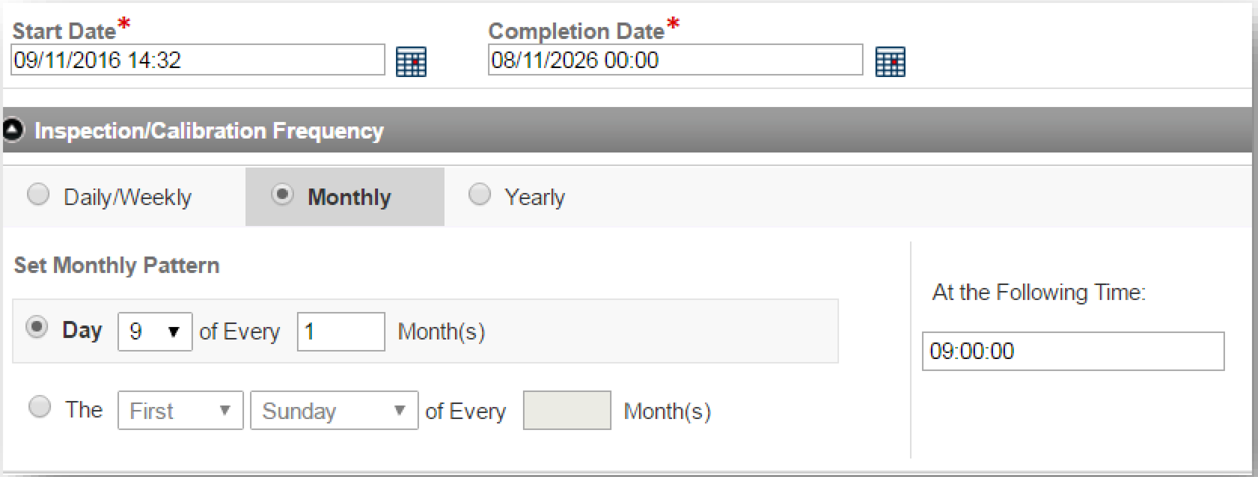
- **Organisation Scope – Location (Internal)** – use the tree picker to select the location you want to associate with your record

Tip: You can remove the default location by clicking the ⊗ and enter a new location

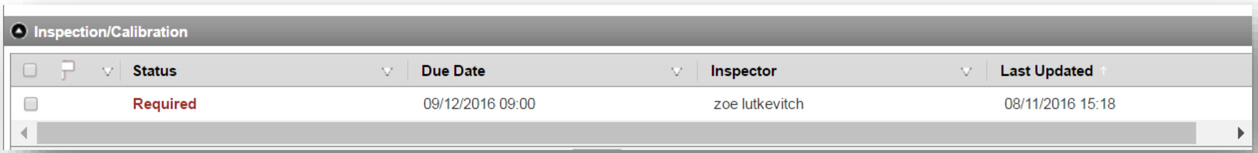
- **Organisation Scope – Location (External)** - use the tree picker to select the customer/supplier you want to associate with your record (optional field)
- **Organisation Scope – Others (Internal)** – use the tree picker to select organisation scope i.e. departments/processes that you may want to associate with your record (optional field)
- **Organisation Scope – Others (External)** – not required
- **Category** – use the tree picker to select the categories you want to associate with your record (this field could be mandatory or optional depending on how it has been set up in the workflow)
- **Owner** – use the tree picker to assign an owner to this record
- **Inspector** – use the tree picker to assign the Inspector – the inspector is the person who will receive the task/email reminder to complete the check/inspection on the asset
- **Restricted Access Group** – this field will restrict who will have access to the record. This should only be used if the information in the record is sensitive or confidential. Using the picker select the individual(s) that you want to include in the Restricted Access Group from the Organisational Unit tree (optional field)

5) Enter the **Description** – this field is useful for entering information about the asset such as the calibration details, weights, sizes, pressure etc
6) Add the **Start Date** – in this field you can add the date the asset was last inspected, the scheduler will then automatically create the next inspection date based on the recurrence rules you set. If the asset has never been inspected, add the next inspection date into this field.
7) Add the **Completion Date** – this is the date you want the inspection to end, if you want the inspection to keep running, add a date 10/15 years into the future
8) Add the **Inspection/Calibration Frequency** – this is how often you want to calibrate/inspect the asset
9) If you select **Daily/Weekly**, you can choose the time, day or week on which a meeting will occur

10) If you select **Monthly**, you can choose which day of the month(s) a meeting will occur
11) If you select **Yearly**, you can choose which day and month a meeting will occur

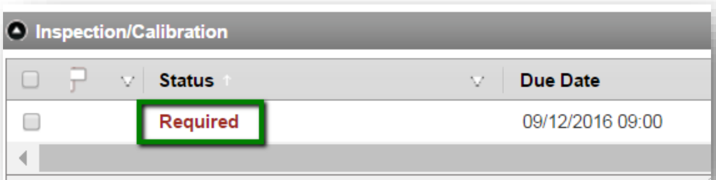


12) Select **Save** – the record will remain in **Draft** until you click **Publish** (selecting OK to Activate)
13) The next inspection will be created and will show the date it is due for inspection

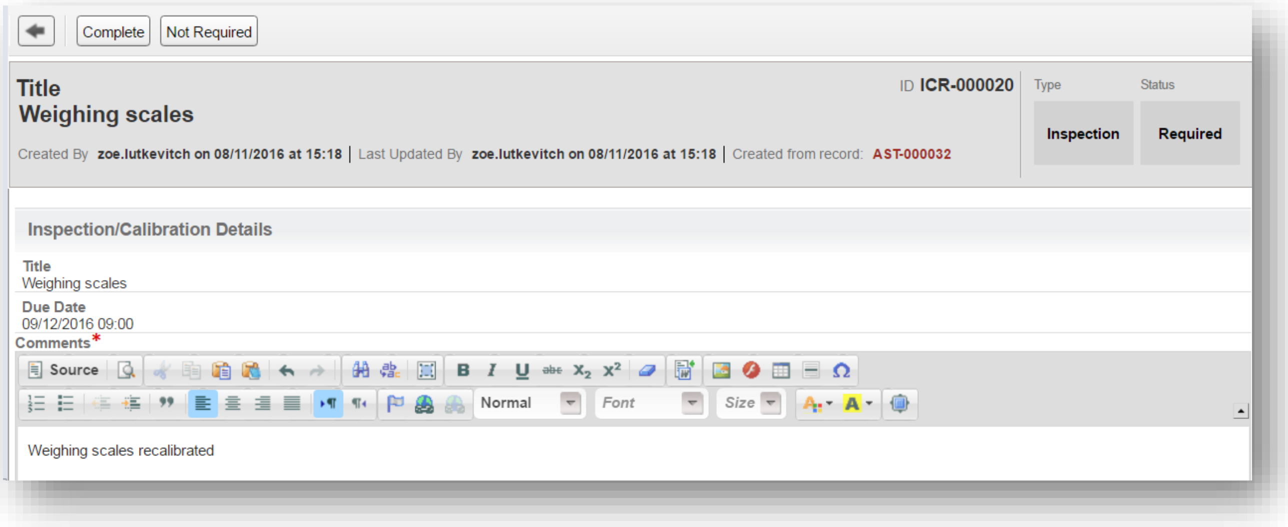


6.2 Conducting an Inspection or Calibration task

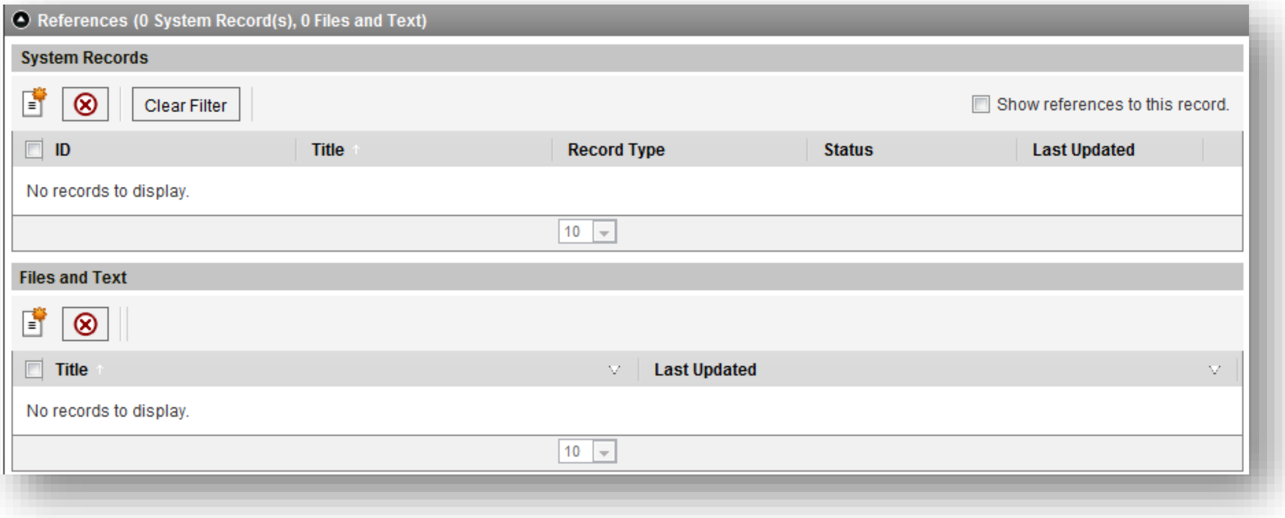
1) Navigate to **Knowledge** and select **Assets**, locate the record you are inspecting/calibrating. Alternatively you can navigate to the record via the email notification or task you have received.
2) Once inside the record, locate the section **Inspection/Calibration**
3) Click the **Required** link



4) Mark your inspection/calibration as **Complete** or **Not Required** adding comments



5) Click **OK**
6) The next inspection will be automatically created as per the frequency rules you have created
7) At any time you can view the inspectors comments by clicking on the **Completed** link within the **Inspection/Calibration** section
8) If you want to add an attachment to the inspection/calibration record, navigate to **References & Attachments** (located at the bottom of the record)



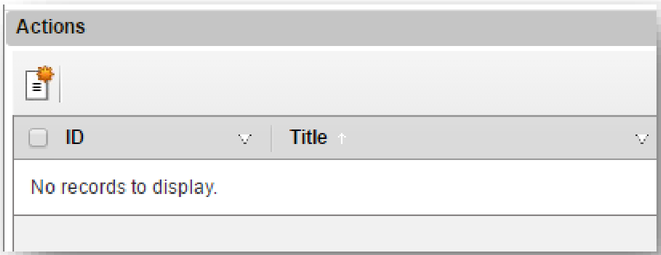
9) Under **Files and Text** click **Create** to upload a new file
10) The **Files and Text** screen will appear
11) Enter the name of your in the **Title** field. This is likely to be the same as the name of the Entropy record

12) Click **Browse** and locate the document you wish to upload on your computer

13) Click the ⊕ symbol to upload the file and repeat if there are multiple files to upload

14) Click **OK** to save the attachments

15) If any actions came from the inspection, these can be added to the inbuilt Action tracker



16) For instructions on how to create an Action, please refer to Entropy User Guide 3 Section 4

6.3 Editing the Asset record

Once the Asset record is in Active state, the majority of the record fields will be locked down to all users including Administrators (fields such as Description, Management System, Location, Category). If you need to update any of these fields you can either redraft the record by selecting **Draft** or select **New Version** if you want the version control to apply to the changes made.

6.4 Ending an Asset record

1) If you require to end an asset inspection from recurring, you can change the completed date within the record to the date you wish the record to end recurring, this will stop the scheduler from running.

2) To change the record state from Active to Withdrawn (effectively removing the record from your active record list) select the **Withdaw** option located at the top of the record

6.5 Asset Reports

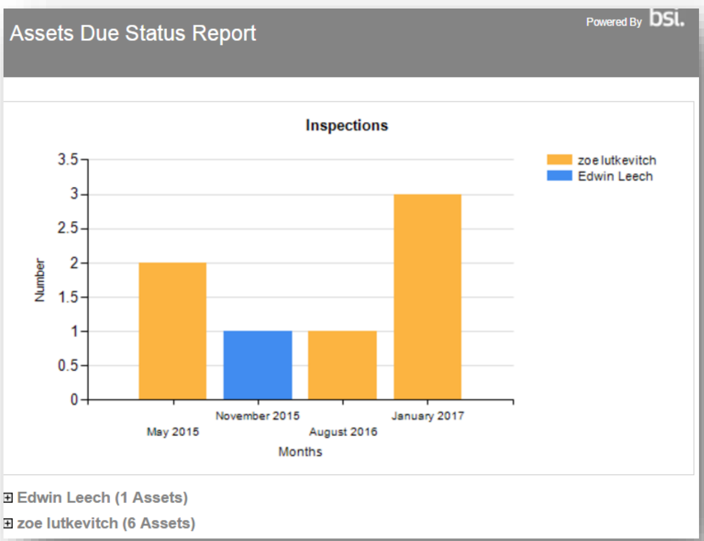
There are two inbuilt asset reports to assist you with managing your asset/inspection due dates:

- Assets Due Date Status Report
- Inspections Schedule Report

Both reports produce very similar data with the Assets Due Date Status Report having the addition of graphical representation

6.5.1 Assets Due Date Status Report

1) Navigate to **Knowledge** and select **Reports** and locate **Assets Due Date Status Report** (if you do not have Reports in your Knowledge menu speak to your system administrator who can enable this for you)
2) You can group your data by selecting **Group by** within the **Grouping and Sorting** section
3) You have the choice of **Guage** or **Bar Chart**, enabled under **View Options**
4) There are a number of Filters that will enable you to search and interrogate your data, for example you may want to see all inspections due for a particular inspector for a particular date range.
5) Once you have chosen your filters click **Run**
6) The following report is grouped by **Inspector** and the view option is **Bar Chart**



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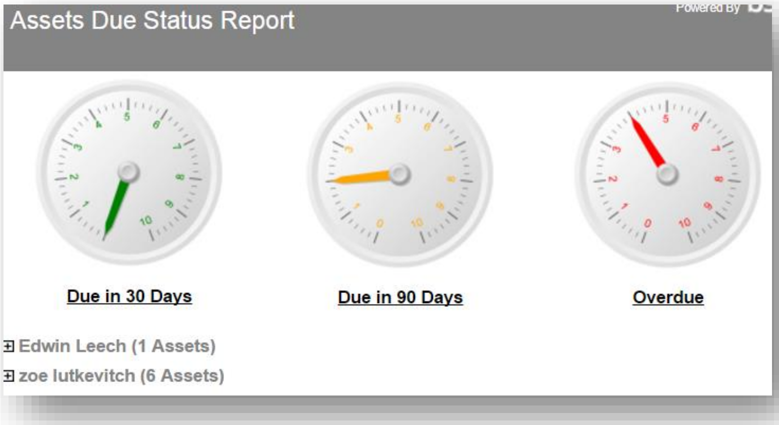
7) This is the same report with the view option **Guage** selected



8) The report can be exported to Excel or PDF by clicking the export icon and selecting your preferred output format

6.5.2 Inspections Schedule Report

1) Navigate to **Knowledge** and select **Reports** and locate **Assets Due Date Status Report** (if you do not have Reports in your Knowledge menu speak to your system administrator who can enable this for you)
2) You can group your data by selecting **Sort 1** and **Sort 2** within the **Grouping and Sorting** section
3) There are a number of Filters that will enable you to search and interrogate your data, for example you may want to see all inspections due for a particular inspector for a particular date range.
4) The following report is sorted by **Due Date** and **Inspector**

1 of 1 Find | Next

Inspections Schedule Report

Powered By bsi.

Overdue	Asset	Status	Location	Inspectors	Due Date	Management System	Category	Inspection Status
Yes	AST-000013 - another test	Active	Headquarters	zoe lutkevitch	30/04/2015	EQH&S, Environment, HR, Health and Safety, Quality		Required
Yes	AST-000009 - ID002 - Thermometer	Active	Headquarters	zoe lutkevitch	01/05/2015	Quality		Required
Yes	AST-000006 - zoe test	Active	Headquarters	Edwin Leech	01/11/2015	Quality		Required
Yes	AST-000028 - Asset test 1	Active	Headquarters	zoe lutkevitch	24/08/2016	Quality	Contracts	Required
No	AST-000007 - ID001 - Thermometer	Draft	Headquarters	zoe lutkevitch	01/01/2017	Quality		Completed
No	AST-000032 - Weighing scales	Active	Headquarters	zoe lutkevitch	09/01/2017	Quality		Required
No	AST-000025 - Roller shutter door - warehouse 1	Active	Headquarters	zoe lutkevitch	01/01/2018	Quality		Required

Records returned: 7

Page 1 of 1

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5) The report can be exported to Excel or PDF by clicking the export icon and selecting your preferred output format

7. Additional Support

If you require any further support in using the Entropy Software, please contact our Helpdesk Teams as follows:

For UK & EMEA

Email: entropy.support@bsigroup.com

Tel: +44 (0)345 5049524

For USA & Americas

Email: entropysupport@bsigroup.com

Tel: +1 888 640 6776

8. Version Control

Version	**Date Changed**	**Author**	**Changes**
V1.00	Jan 16	MC	First draft
V1.01	Nov 16	ZL	Added sections for Training, Meetings, Legal Register, Assets & Reports
V1.02	Jul 20	ZL	Change to copyright year, general tidy up