

Searching, Filtering, Querying and Reporting

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Searching, Filtering, Querying and Reporting

In this section you will learn how to search, filter, query and report on your Organization's records.

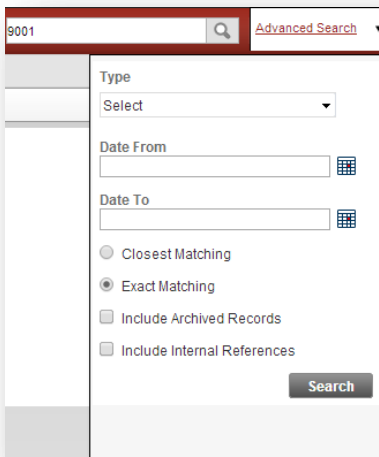
1. Locating records using Entropy's Advanced Search tool

When using Entropy's search facility you are not just searching on the title of a record but its contents also.

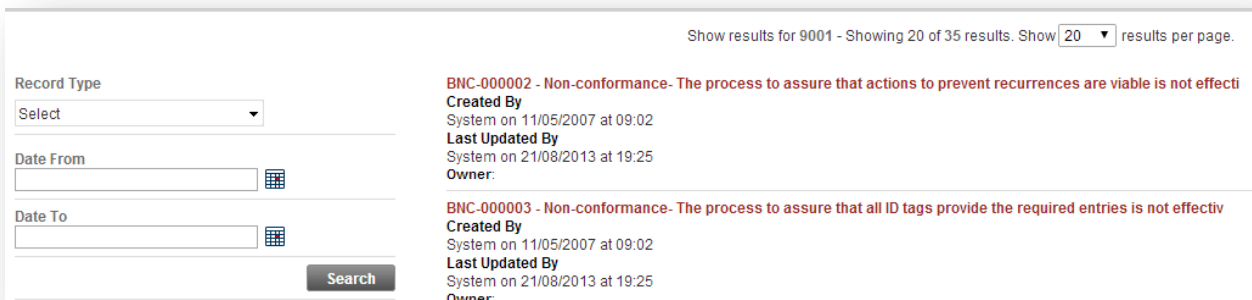
- 1) Enter the text you are searching for in the search dialogue box located near the top right corner of your screen



- 2) To make you search more specific, click the **Advanced Search** button located to the right of the search box
- 3) Enter your search criteria and click **Search**




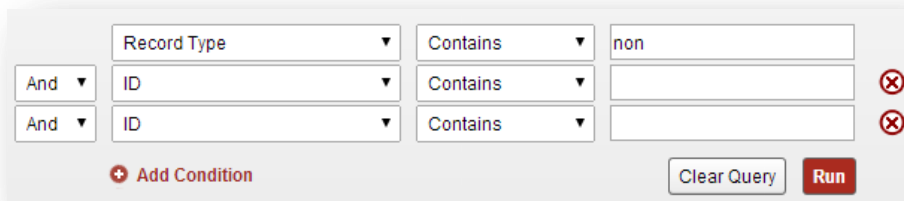
- 4) Click on the record you want to view from the Search Results list
- 5) You can narrow down your search results further once the results have been returned by specifying the record type and or a date range



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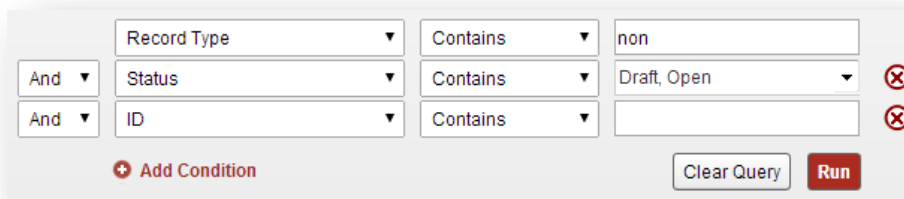
2. Querying your Organisation's records

- 1) Go to the tool containing the record you want to view/edit. For example: **Compliance > Findings**
- 2) Click the **Filter** icon located on the far right hand-side of the record 
- 3) Click the top left Query drop down menu and select a filter from the list
- 4) Use the centre drop down menu and open text field/additional menu to specify your query



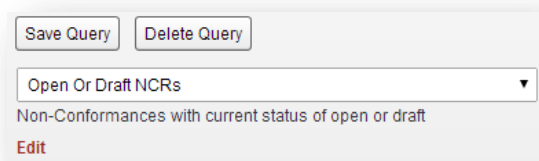
The screenshot shows a query builder interface with three conditions. The first condition is 'Record Type' with the operator 'Contains' and the value 'non'. The second and third conditions are 'ID' with the operator 'Contains' and an empty text field. There are 'And' dropdowns between the conditions, a '+ Add Condition' button, and 'Clear Query' and 'Run' buttons at the bottom.

- 5) Repeat if necessary for the remaining query drop down menus



The screenshot shows the query builder interface with three conditions. The first condition is 'Record Type' with the operator 'Contains' and the value 'non'. The second condition is 'Status' with the operator 'Contains' and the value 'Draft, Open'. The third condition is 'ID' with the operator 'Contains' and an empty text field. There are 'And' dropdowns between the conditions, a '+ Add Condition' button, and 'Clear Query' and 'Run' buttons at the bottom.

- 6) Click **Run** or alternatively cancel the query by clicking the **Clear Query** button
- 7) The results of the search will appear in the lower half of the screen. Click on the record you want to view from the Query Results list
- 8) If this is a query that you will run regularly, the Query can be saved for future use.
- 9) To save the query, enter the name of the query in the **New Query** field located in the top right hand corner of the record



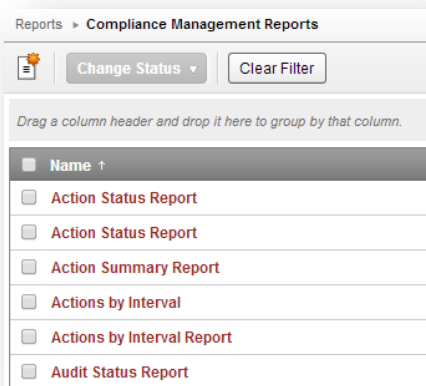
The screenshot shows a 'Save Query' dialog box. It has 'Save Query' and 'Delete Query' buttons at the top. Below is a dropdown menu with the text 'Open Or Draft NCRs'. Underneath the dropdown is the text 'Non-Conformances with current status of open or draft' and an 'Edit' link.

- 10) Click **Save Query**
- 11) To access the saved query, click the **New Query** drop down menu, select the saved query and click **Run**

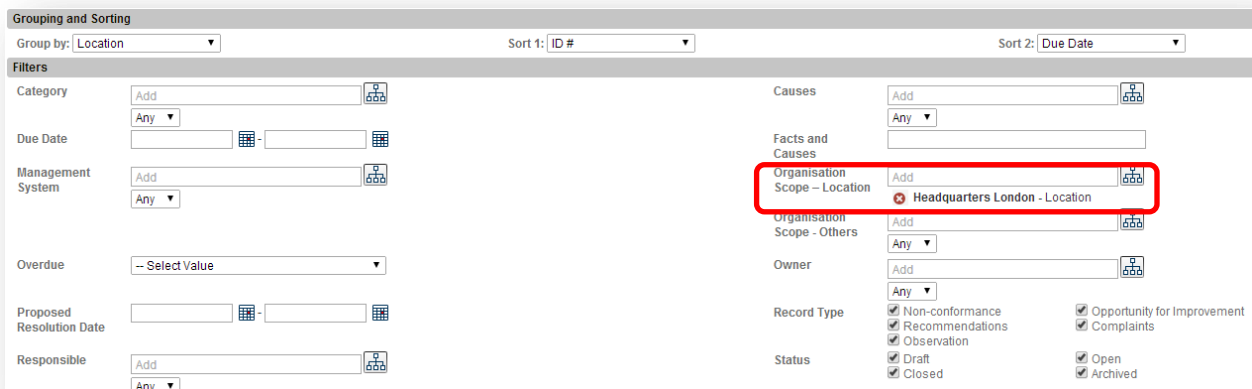
3. Reports


Entropy converts your Organisation's Records and Data into a report structure utilising graphs and charts.

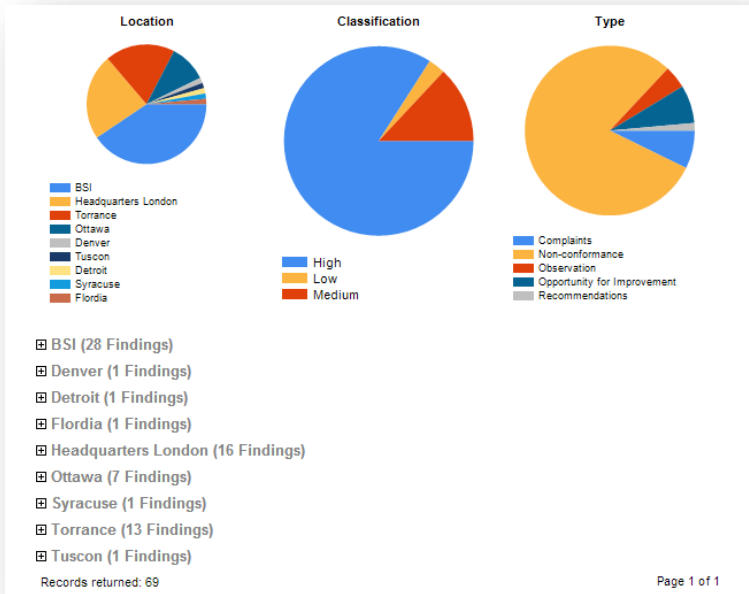
- 1) To run a report click **Compliance** from the primary toolbar, select **Reports** from the drop down menu
- 2) Entropy comes shipped with a number of standard reports. To run a report in Entropy, click on the name of the report from within the list



- 3) Here, you can apply some additional filters and/or grouping and sorting to the report:



- 4) Or you can run the report without additional filtering by clicking Run 



5) To drill down into the report detail, click on the Plus icon

BSI (28 Findings)
 Denver (1 Findings)

NCR-000001 - Damaged MD5 equipment

Type: Non-conformance Organisation Scope: Other: None
 Owner: Kris Sinclair Management System(s): Quality, Health and Safety Category: Production, Hydroelectric

Due Date	Classification	Causes	Audit	Status
30/04/2014	High			Closed

6) If you applied any filters to the report and would like to save the report for future use click **Save As**

7) Enter a **Title** for the saved report and click **Save**

Create Saved As Report ✕

Title:

8) To view or access your saved reports click the Reports icon your primary toolbar

Name	Module
Headquarter Actions	Compliance Management

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4. Summary

After reading this section, you should now understand how to:

- Search for records
- Filter/Query records
- Run Reports

5. 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