Administration & Configuration user guide

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General Administration and Configuration

When you begin building the structure of your Organisation within Entropy it is recommended that you start by creating your higher level locations, people, departments and processes first, for example: If your organisation operates globally, start by entering the continents where the organisation is located; next, enter the countries within the continent where your organisation is operating, similarly, when creating users create them in hierarchical order, starting with your management first.

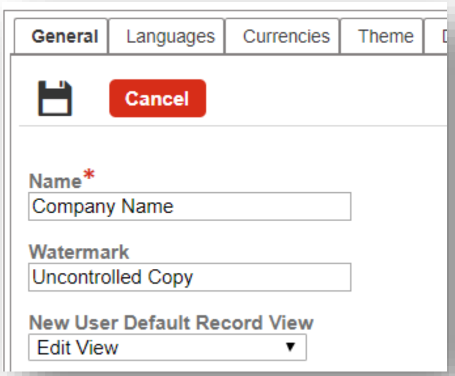
Note: Only users with **System Administrator** privileges will be able to access the **Administration** & **Organisation** menus in Entropy

1. Customising your Entropy system

1.1 Entering or editing your Organisation's name into Entropy

You will need to enter your organisation's name into Entropy before you can begin build your organisation's structure.

1) Click **Organisation** from the menu toolbar, select **Profile** from the drop down menu
2) Click the **General** tab from the Profile toolbar
3) Click the **Name** field and enter the name of your organisation, if you are making a change to an existing name simply overtype the existing name in the name field



4) Click **Save** to apply the changes

1.2 Adding a Watermark

You can apply a watermark to records (not attachments, attachments will not be watermarked) that are exported out of Entropy

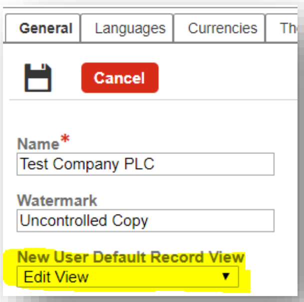
1) Click **Organisation** from the menu toolbar, select **Profile** from the drop down menu
2) Click the **General** tab from the Profile toolbar
3) Entropy will already have a watermark set up **Uncontrolled Copy**, to edit this simply overtype the text or to remove simply delete the text
4) Click **Save** to apply the changes

> **Note**: Attached documents will not show the watermark when they are printed unless you have manually added watermark to the attached document

1.3 Default Record View

Entropy gives you the option which view a new user will see when they open a record. A new user can view records in **Edit View** which gives the user the option to edit the record as long as they have a role and the correct access/privileges. **Detailed View** is essentially a read only view. Whilst in the record the user will always have the option to toggle between the two views.

1) Click **Organisation** from the menu toolbar, select **Profile** from the drop down menu
2) Click the **General** tab from the Profile toolbar
3) Click the drop down arrow on the **New User Default Record View**



4) Select the preferred view
5) Click **Save** to apply the changes

1.4 Adding a Logo

1) Click **Organisation** from the menu bar, select **Profile** from the drop down menu
2) Click the **Theme** tab from the Profile toolbar
3) Add a logo to your system by clicking the **Browse** button and selecting a logo

> **Note:** Logos must be in the PNG format and can be no larger than 64px high and 400px wide with a maximum size of 100KB

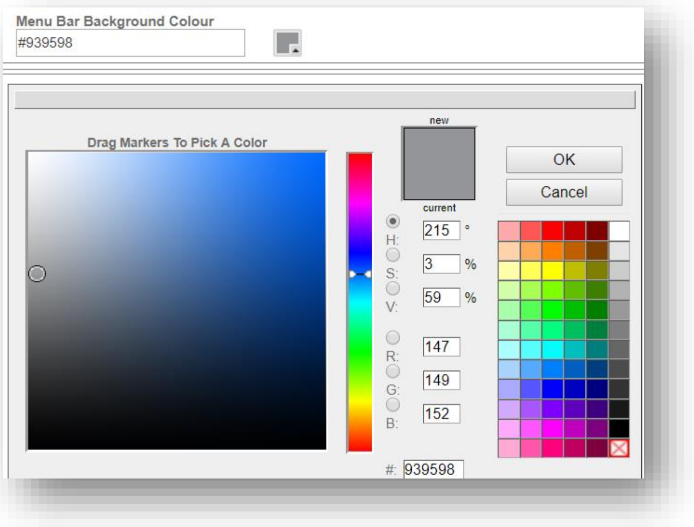
4) Click the **Preview** button to preview the logo
5) Click the **Upload** button to upload your logo

6)	Click **Save** to apply the changes

Note: You will need to refresh your browser before your changes will be reflected in Entropy, this can be achieved by selecting F5 on your keyboard or logging out and back into Entropy. If your logo does still not display, clear your browser's cache.

1.5 Changing the Menu Bar background colour

1) Click **Organisation** from the menu bar, select **Profile** from the drop down menu
2) Click the **Theme** tab from the Profile toolbar
3) Choose the colour of **Menu Bar Background Colour** by clicking the **Colour Picker**
4) Alternatively you can enter the pantone reference
5) Click **Save** to apply the changes



Note: You will need to refresh your browser before your changes will be reflected in Entropy, this can be achieved by selecting F5 on your keyboard or logging out and back into Entropy

1.6 Password security

As an administrator you are able to set **Password Expiration Rules** and **Password Re-Use Rules**

1) Click **Organisation** from the menu bar, select **Profile** from the drop down menu
2) Click the **Passwords** tab from the profile toolbar
3) If you want your manage a password reset after *n* days for either/both the system login and secondary (e-signature) passwords complete the following:

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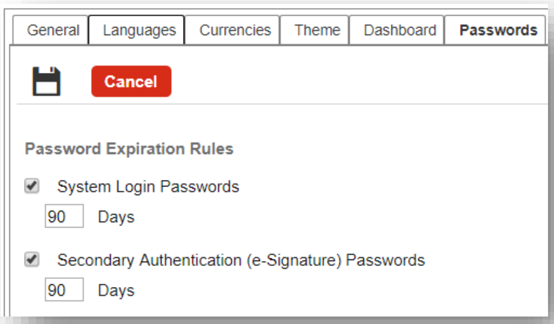
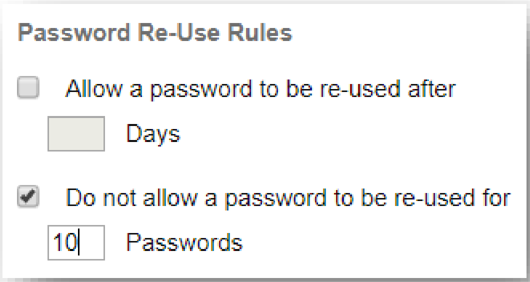


4) To manage the re-use of passwords complete one of the following:



5) Click **Save** to apply the changes

2. Creating Locations

Locations underpin the Entropy structure. A location is required for almost all record types and a user cannot be created without the location(s) first being set up. Locations also play a part in System Context (see System Context section for more information)

1) Click **Organisation** from the menu bar, select **Structure** from the drop down menu
2) If you are creating a location for the first time or you are creating a hierarchical location click **Locations** so that it becomes highlighted

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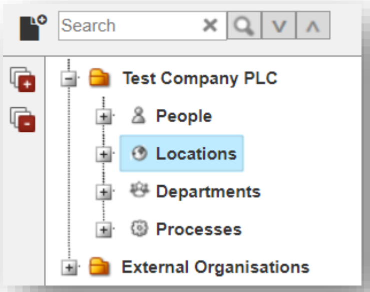
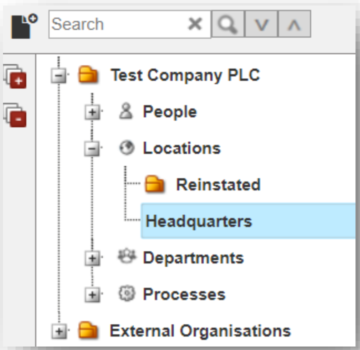


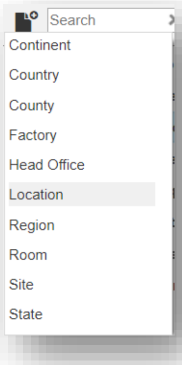
3) Alternatively, if you are creating a sub-location of a location you have already created, click the name of the location so that it becomes highlighted



4) Click the **Create** button

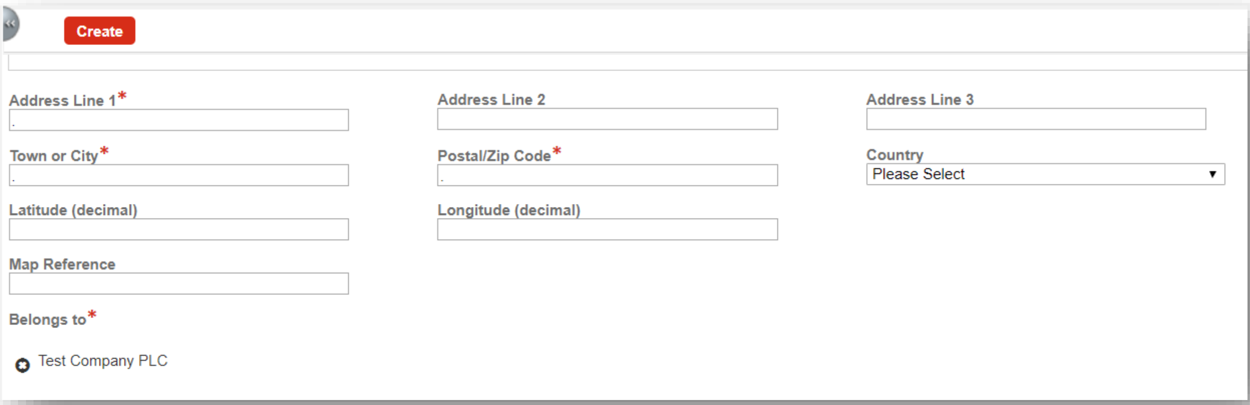
5) You will be presented with a list of location types, select the type applicable to the location you are creating

Note: When you come to create users, you will be required to link the user to a location, users can only be linked to the following location types: Location, Head Office, Factory, Room & Site therefore if you want to 'base' your users at locations only use these types.



6) Enter the location name, this could be a Country, Town, Site, Office etc. Complete the **Description** (optional) and the **Address** fields

7) Click the **Belongs to** picker. The location you are creating will either belong to the Organisation name (top of the structure) or it may belong to another location within the structure i.e. you may be creating a Town that belongs to a Region

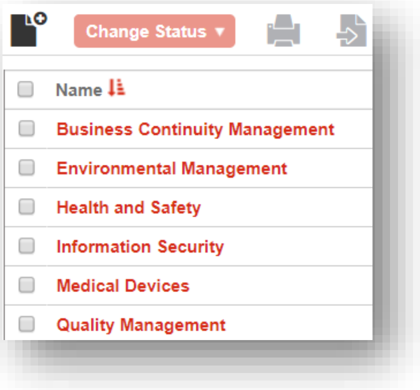


8) Click **Create**
9) You will be prompted to **Change the record status to Active?** Click **OK** to proceed
10) The location you have just created will now appear in the Locations list
11) Repeat the above steps until you have created all of your locations in the structure

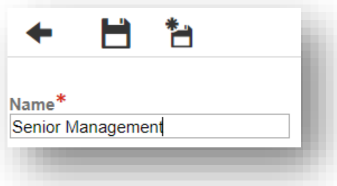
3. Creating Management Systems

Management Systems are informational tags for Entropy records. By creating Management Systems in Entropy you help users organise their records. Correctly tagged records will help with record management, data retrieval, reporting and communication. Management systems also play a part in System Context (see next section for more information)

1) Click **Administration** from the menu bar, select **Management Systems** from the drop down menu
2) The software comes shipped with a number of default Management Systems which can be renamed, deleted or added to



3) To create a new Management System click the **Create** button . Enter the name of the Management System, followed by the **Save** button



4) To delete a Management System, locate the Management System, tick the box to left and click Change Status. Select **Delete** followed by **OK** to confirm the deletion
5) To edit a Management System, select the Management System, edit as desired followed by the **Save** button

4. Creating System Context

A system context is a link between Management System(s) and Location(s). Associating System Context with particular users will limit the records a user can **view**. Creating System Contexts will help ensure that users can only see records tagged against Management Systems and Locations applicable to them.

Entropy comes shipped with a default **Global System Context** which includes all management systems and all locations and would be given to those users in the organisations who are not restricted in what they can see on the system.

Scenario

You have one location called 'Head Office'

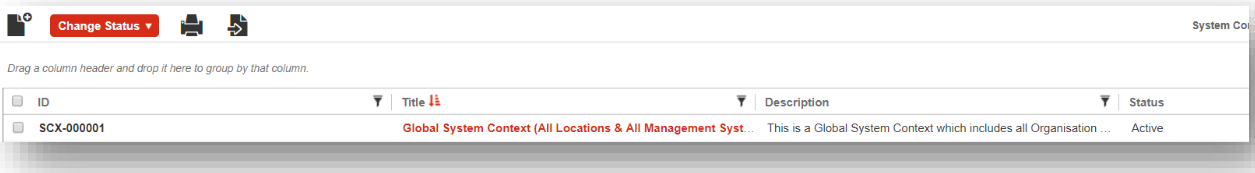
You have a number of management systems, one of those management systems is called 'Senior Management'. You *__only__* *want senior managers to see records that are tagged with the management system 'Senior Management' due to the sensitive nature of the data. All other users should be excluded from it.*

Solution

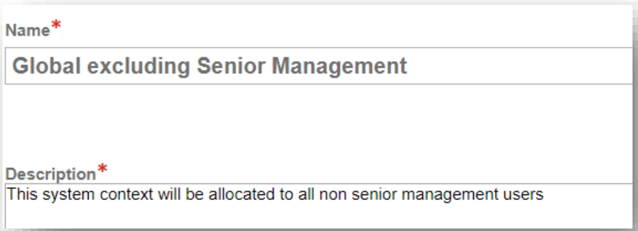
Create two system contexts:

I. *Global (give this to the Senior Management team)*
II. *Global excluding Senior Management (give this to all other users)*

1) Click **Administration** from the menu bar, select **System Contexts** from the drop down menu
2) The page will display the default Global System Context and any others that come shipped with the system



3) Click the **Create** button
4) Enter the name of the System Context in the **Name** field and a brief description in the **Description** field



5) Next, select the context. Use the **Management System** picker and click the plus symbol to select the Management System(s)
6) In the image below, Senior Management has intentionally not been included

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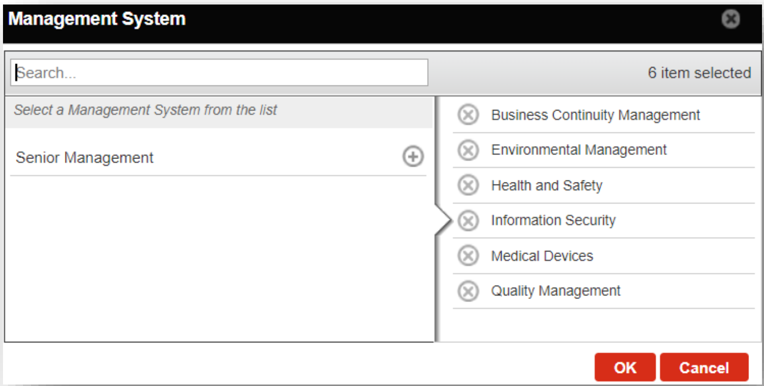
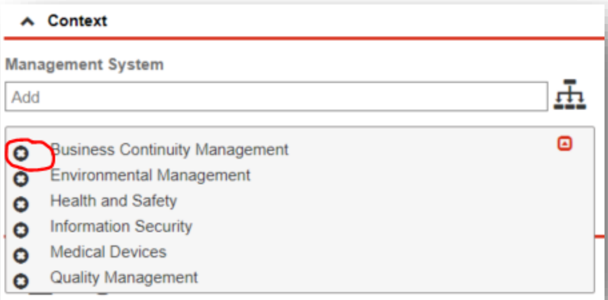


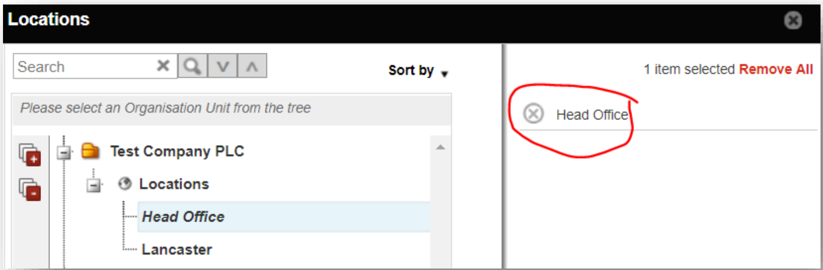
7) Select **OK** to save the changes

8) To view the selected Management Systems click on the collapsed list icon

9) To remove any of the Management Systems click the delete symbol as illustrated below



10) Next, select the **Location**. Use the **Location** picker . Expand the Locations by simply clicking the symbol in the structure. Select the Location(s) from the menu on the left, this will move the selection to the menu on the right



11) Select **OK** to save the changes

12) Click the **Create** button located at the top of the page. You will be prompted to **Change the record status to Active?** Click **OK** to proceed

Note: The system context will be associated to the user in the next section

5. Creating Users & People Accounts

There are two types of accounts you can set up in Entropy

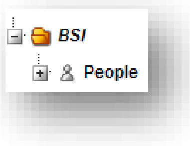
a) Users – users will log into Entropy to perform tasks and will take up a user license
b) People – people will not log into Entropy, they will not have any user credentials. They will however be a name on the system that you can associated training needs to

There are two stages to creating a user account; the first stage is creating the person i.e. name, email, where the person is based, who they report to, etc. The second stage is to create their user details i.e. their username and their system access (when creating 'people' on the system you will not complete the second stage)

Note: When setting up users it is recommended that users are created in hierarchical order starting with your management tier first.

5.1 Create the Person details

1) Click **Administration** from the menu bar, select **User Management** from the drop down menu
2) Click the Create button
3) Select the **Create New Person** radio button
4) From the **Type** drop down select from **Employee, Contractor** or **Person**
5) Click the **Reports to** picker. If you already have users set up, click the plus symbol next to **People** to expand the tree view. Alternatively, if the person you are creating does not report to anyone or the hierarchy has not yet been set up, then select your organisation name at the top of the tree structure



6) Select **OK** to save the changes
7) Click the **Based at** picker and click the plus symbol next to **Locations** to expand the tree view

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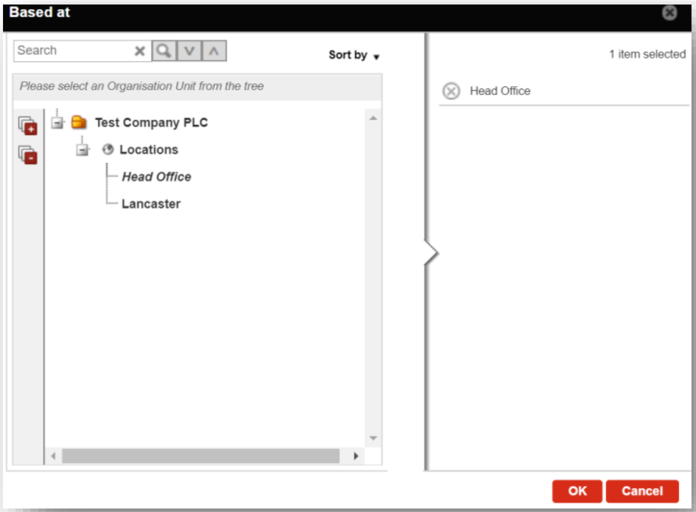
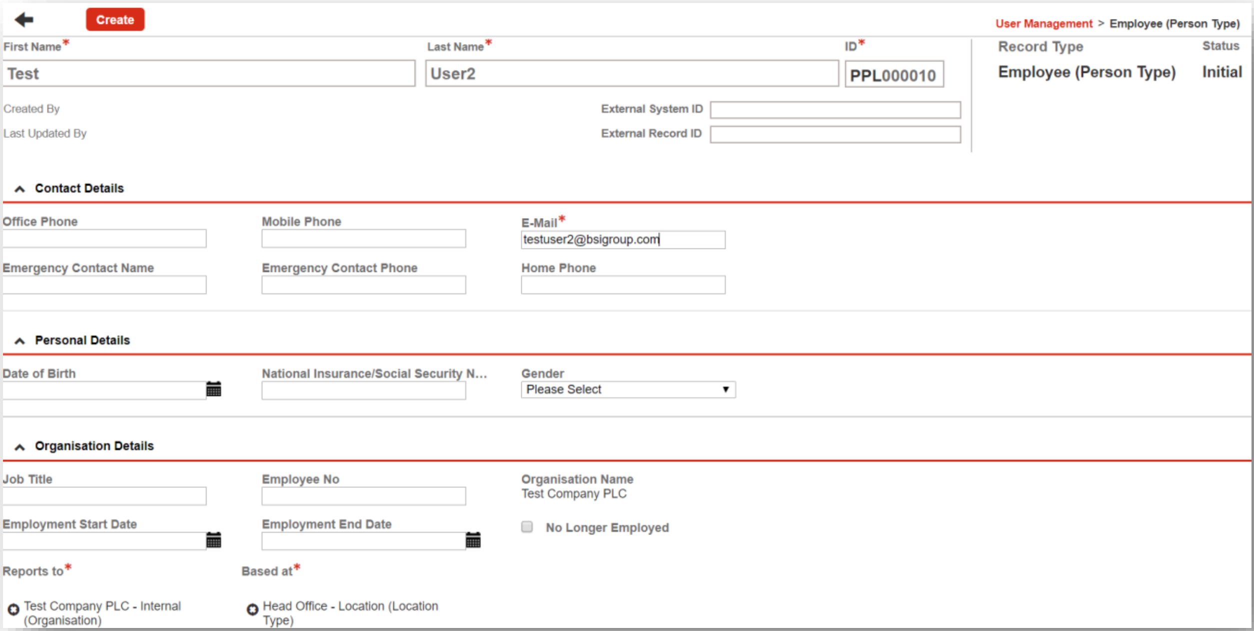


8) Select **OK** to save the changes
9) Click **Next** to proceed to the next step
10) Enter the **First Name**, **Last Name** & **Email** of the person you are creating. All other contact, personal and organisational details are optional
11) Verify the **Reports to** and **Based at** details are correct, if not, these can be changed by clicking the picker and selecting the correct details from the people/location list presented



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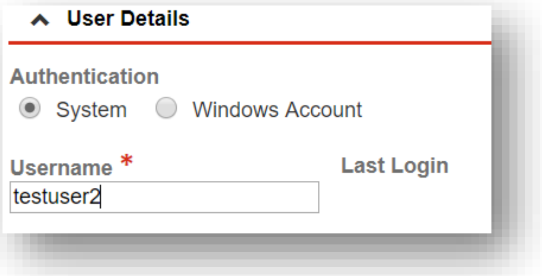
12) Click the **Create** button, you will be prompted to change the record status to **Active**, select **OK**. You will automatically be directed to the **User** tab 

5.2 Create the User Account details

1) Following on from the previous section, ensure you are still in the User area 

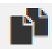
2) Under **Authentication**, leave the default setting to **System** (if you are hosting the software yourself and intend to use single sign on, please refer to the Technical Helpdesk for further assistance). Windows Account and Windows Domain will remain disabled, again they are only relevant to organisations who host their own software
3) Next, enter the **Username** in field provided. The username is usually a combination of the user's name i.e. test.user2 or testuser2 (note: the username is NOT case sensitive)



4) **Default Dashboard** – if you have already created dashboards within the Entropy system, a default dashboard can be assigned to a user account, simply select the dashboard from the drop down list (for more information on dashboards please refer to the dashboard userguide)
5) **Default Language** – if your organisation has signed up for multiple languages, a user's default language can be changed by simply selecting the language from the default language drop down field
6) **Default Record View** - Entropy gives you the option which view a new user will see when they open a record. A user can view records in **Edit View** which gives the user the option to edit the record as long as they have a role and the correct access/privileges. **Detailed View** is essentially a read only view. Whilst in the record the user will always have the option to toggle between the two views. Click the drop down to select the preferred view for the user

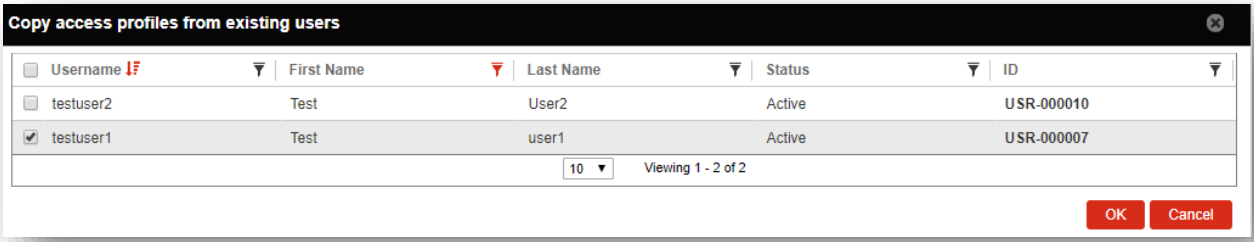
5.2.1 Access Profiles (suggested profiles for each module)

Access profiles define what tools and levels of permission a user has. Combined with the System Context, this completes a user's permissions in the software. The access profile records in most cases are hierarchical, so if you selected Compliance Manager for a user, you would not need to select Compliance User or Compliance Reader as well (please note this rule does not apply for Incident access profiles)

2) Following on from the previous section, scroll down on the newly created user details to **Access Profiles**. A user's access profile(s) determines the records a user can view, edit or transition.
3) When assigning access profiles to a user, you have two options
   a) Copy an existing users access profiles  (recommended)

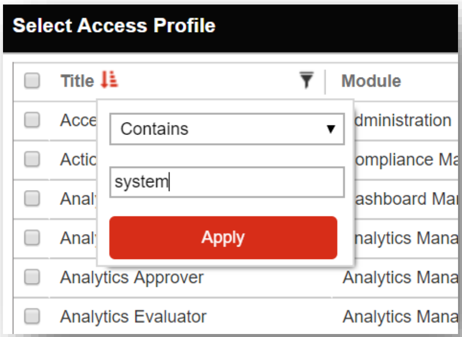
b) Create the access profiles from new

4) To copy an existing users access profile, click . Locate the user who's access you wish to copy, tick the box and click **OK**



5) To create from new, click you will be presented with 120+ different access profiles. Scroll to the bottom of the page and change the page view from 10 to 100

6) You can filter and search Access Profiles: scroll to the top of the page and click **Title** or **Module**, this will sort the lists into alphabetical order (the field which has the icon is the one that is being sorted, the arrow shows the direction of sort a-z or z-a). To search for a specific access profile or module, click the filter arrow to the right of **Title** or **Module** , enter the text you are searching for and click **Apply**



7) The search results will display, tick the applicable profile(s) and click **OK** to accept

8) The following screen shows the access profiles selected commonly given to a system administrator

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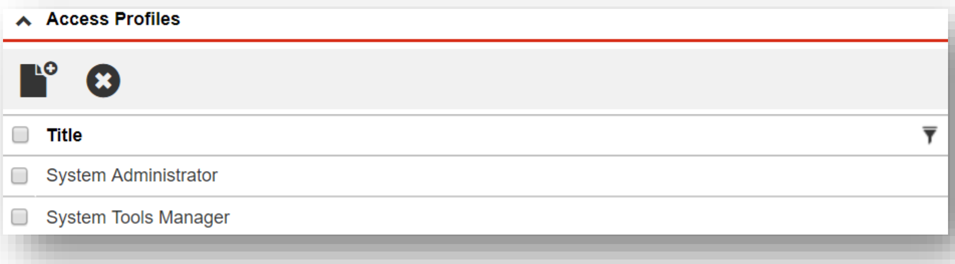


9) Work down the list and select the roles that are applicable to the user you are creating. Select **OK** to save the profile
10) The following table lists the most common access profiles in Entropy and a brief description:

Compliance Module (main profiles to consider)	
Compliance Manager	View/Create - Actions, Action Plans, Recurring Action Plans, Quick Audits, Scheduled Audits, Protocols
Compliance User	View/Create - Findings, Actions, Action Plans, Recurring Action Plans
Compliance Reader	View only - Findings, Actions, Action Plans, Recurring Action Plans, Quick Audits, Scheduled Audits
Compliance Module (additional profiles to consider)	
Finding Approver	Approves/Rejects - Findings
Finding Acceptor	The user with this role can Accept or Reject the Finding
Action Approver	Approves/Rejects - Actions
Action Acceptor	The user with this role can Accept or Reject the Action
Knowledge Module (main profiles to consider)	
Knowledge Reader	View only - all record types within the knowledge module i.e. documents, meetings, assets etc.
Knowledge Manager	View/Create – all record types within the knowledge module i.e. documents, meetings, assets etc.
Procedure Document Reviewer (now called Controlled documents in Entropy)	Can approve/reject a Controlled document as part of the review process
Procedure Document Manager (now called Controlled documents in Entropy)	Can view/create Controlled type documents Will be notified when a controlled document is ready for periodic review

Procedure Document Reader (now called Controlled documents in Entropy)	View only – can view only Controlled type documents
Guidance Document Approver (now called General Documents in Entropy)	Can approve/reject a General document as part of the review process
Guidance Document Manager (now called General Documents in Entropy)	Can view/create General type documents
Guidance Document Reader (now called General Documents in Entropy)	View only – can view only General type documents
Training Manager	Can see training needs for all users Can update other users training needs
Training User	Can be assigned a training need, can update their own training need
Training Course Manager (you do not need to assign this if you have given Knowledge Manager)	Can create training courses
Training Course Reader (you do not need to assign this if you have given Knowledge Reader)	View only – can view all training course records
Legal Register Manager (you do not need to assign this if you have given Knowledge Manager)	Can create and complete legal register reviews Will be notified when a legal register record is due for review
Legal Register Reader (you do not need to assign this if you have given Knowledge Reader)	View only – can view all legal register records
Meeting Manager (you do not need to assign this if you have given Knowledge Manager)	Can create and view all meetings
Meeting Reader	View only – can view all meeting records

(you do not need to assign this if you have given Knowledge Reader)	
Asset Manager (you do not need to assign this if you have given Knowledge Manager)	Can create and complete asset inspections
Asset Reader (you do not need to assign this if you have given Knowledge Reader)	View only – can view all assets records
Knowledge Module (additional profiles to consider)	
Knowledge Management Administrator	Archive records & remove records from the recycle bin
Knowledge Management Super-user	Create/edit/transitions all record and record types according to their permissions access to location and managements systems (system context)
Knowledge Record Type Manager	Change forms and workflow rules for Knowledge records
Incidents Module (main profiles to consider)	
Incident Recorder	Users who can create an Incident/Near Miss
Incident Acceptor	Users who can accept an Incident/Near Miss and assign an Owner
Incident Manager	Users who can be the Owner of an Incident/Near Miss
Lead Investigator	Users who can be Lead Investigators
Investigator	Users who can be on the Investigation Committee
Incident Viewer	Users who can only view Incidents but do not have a record role and therefore the record is completely locked down
Incident Privacy Case User	Users who can see Incident records marked as 'Privacy Case'
Incident Approver	Users who can Approve an Incident for completion
Incidents Module (additional profiles to consider)	
Incident Administrator	Users who can Archive, Delete Incident Records (other users that can perform these actions are the records 'Owner', system administrator and Incident Superuser)

Incident Super User	This is the highest level of Access for the Incident module and will allow users full access to all Incident records and workflow (cannot view any fields protected by 'Privacy Case')
Risk Module	
Risk Manager	Can create risk records, risk assessments, configure all areas of the risk tool, conduct risk assessments
Risk Assessor	Can view risk records, conduct risk assessments, create and view risk controls
Risk View Only	Users who can only view risk but do not have a record role and therefore the record is completely locked down
Mobile App & Events	
Mobile User	User can log in to the mobile application and create events
Event Queue Acceptor	A user who has this profile can access the event queue, and can transition an event into any kind of record supported by the event queue which that user's other permissions allow them to create
Administrator	
System Administrator	Allows a user to view, edit, transition any record. Also allows the user to create other users and adjust access profiles. This is full access
System Tools Manager	Manage the recycle bin, system activity log, system version, configure prefix and notification definition tools
Reports	
Report Viewer	Allows a user to view and run reports, change filter options & save into their saved reports
Report Manager	Allows a user to view and run reports, change filter options, and to create new reports.
Dashboards	
Analysis Dashboard Gadget Viewer	Allows a user to view analysis type dashboards
Dashboard Manager	Allows a user to create dashboards and give view privileges to other users

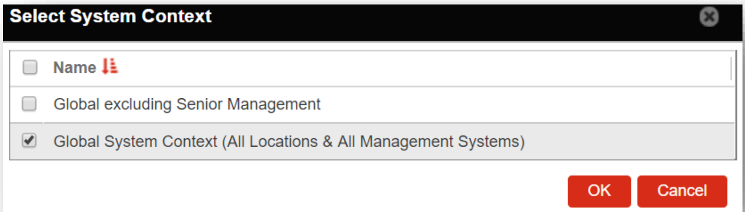
5.2.2 Assigning System Context(s) to a User Account

Note: a user's system context will restrict what records they can see regardless of their access profile (unless a System Administrator).

Entropy is shipped with a default Global System Context, which includes all Management Systems and Locations and would be used for organisations who do not want to limit access to records relating to a particular management system or a particular location (click here for more information about the creation of system contexts).

1) When assigning system context to a user, you have two options
   a. Copy an existing users system context
   b. Create the access profiles from new
2) To copy an existing users system context, click . Locate the user who's context you wish to copy, tick the box and click **OK**

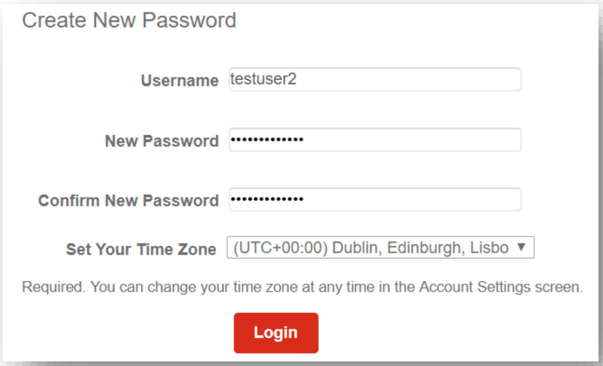
3) To assign an existing **System Context** to a user account click the Create button
4) Choose **Select Existing** from the drop down menu
5) A list of existing system contexts will display, select those that are applicable (multiple can be selected) and click **OK** to update the selection



6) Click **Save**
7) Once the users access profile and system context have been created the final step is to select the Create User button located top left of the screen

Note: When the Create User button is clicked, the user will automatically be sent an email from the Entropy system – this feature cannot be disabled.

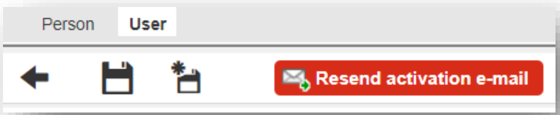
8) Once the newly created user receives the email they will be directed to click on a link to activate their account, create a password (the password is case sensitive) and set their time zone



5.3 Re-send Activation email

If you have users that have not activated their accounts you can resend the activation email (if the user advises they have not received the activation email check the email address in the users account and advise the user to check their spam/junk folder)

1) Click **Administration** from the menu bar, select **User Management** from the drop down menu
2) Select the user from the list by click on the username
3) Select **Resend activation e-mail**



6. Removing Users

When an Entropy user leaves the business it will be necessary to manage their account. Deleting accounts is to be avoided as this will remove all historical associations and it is a good idea to maintain visibility of this for audit purposes even if the employee is to play no further part in Entropy.

Note: do not overwrite the existing user with details of a new staff member. The new user would inherit the account history. You must disable the existing account and create a new account for the new staff members to preserve an accurate audit trail.

1) Go to **Administration** then select **User Management**

2) Locate the user you are going to remove

3) In the **Person** tab go to **Associations**. If the person you are removing has anyone reporting to them these will need to be reallocated to report to someone else (to do this go to Organisation > Structure > locate the person in the People tree structure and move them using 'drag and drop')

Test User2 Associations

Association	Name	Type	Organisation
Based at	Head Office	Location (Location Type)	Test Company PLC
Reports to	Test Company PLC	Internal (Organisation)	-

4) Still in the **Person** tab go to **Associated Business Roles**. If the leaver is associated with any business roles remove them from the business role (to do this go to Administration > Business Roles > locate the role and delete the user from the 'Members' field > click Save)

Associated Business Roles

Title	Organisation Scope	Management System
No records to display.		

5) Still in **Person** tab go to **Record Responsibilities**. This displays any records the leaver has a role in. You may want to consider going to each of these records and removing the user and replacing with another user – if you don't do this step any 'live' records the user has a role in will become **invalid.** For documents, there is a tool called 'bulk edit records' which will help with this, for other record types the process is manual.

6) Once any 'live' records have been re-allocated, you can disable the user accounts. Click the **User** tab

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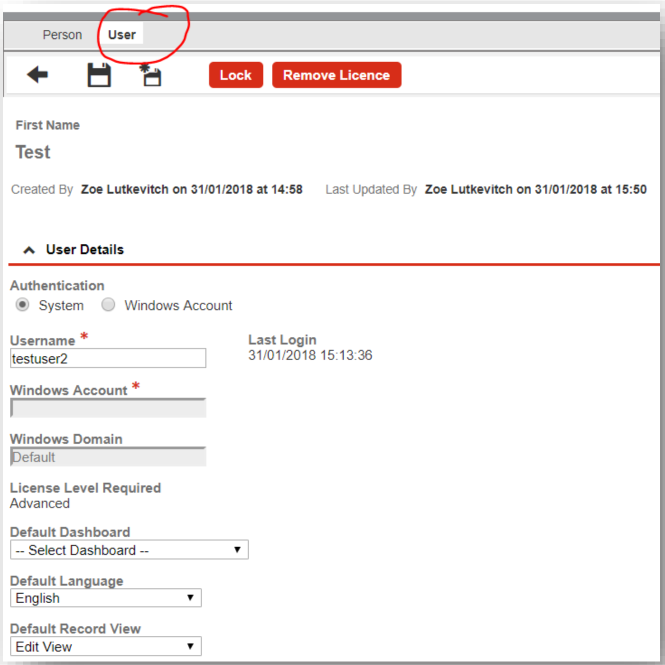
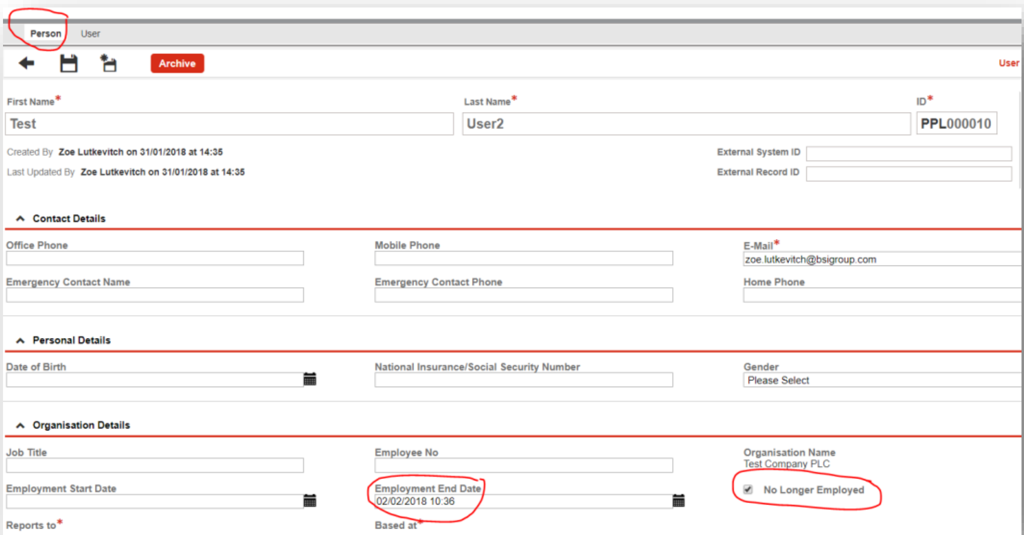


7) Select **Remove Licence**, this will prevent user logging in and free up the license for another user

8) Next select **Person** (located next to the user tab)

9) Enter the **Employment End Date** and tick **No Longer Employed**



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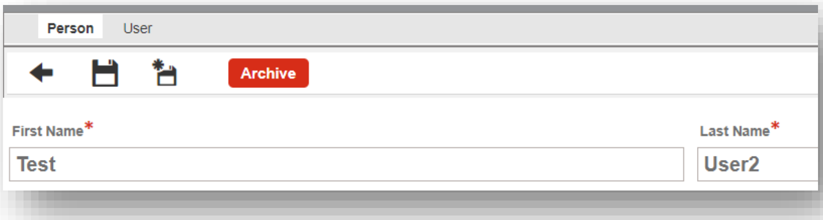
10) Consider changing the email address to "catch" any notifications that are intended for this user.

11) Finally, once all of the changes explained above have been applied the leaver can be 'archived' from the system



6.1 Bulk Allocation of Records - Documents

When a user leaves your organisation they may have a number of 'live' records assigned to them that will need to be allocated to another user in the system (otherwise the 'live' records will become invalid when you deactivate their account). Currently these records will need to be manually assigned to another user with the exception of Documents as there is a bulk allocation tool that you can use to re-assign records from one use to another.

The fields that you can reallocate/edit are:

- Reviewers
- Owner
- Responsible
- External System ID
- External Record ID

1) Go to **Administration** then select **Bulk Edit Records** from the drop down menu

2) **Select record type** from the drop down menu

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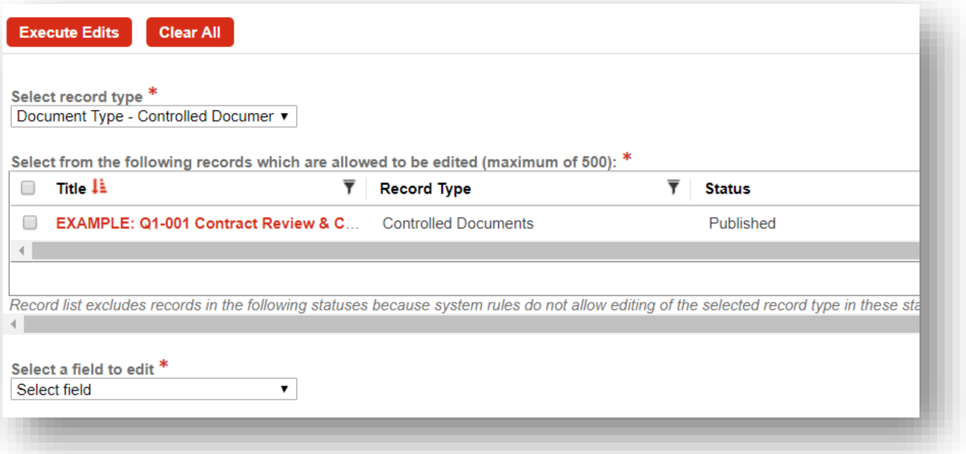
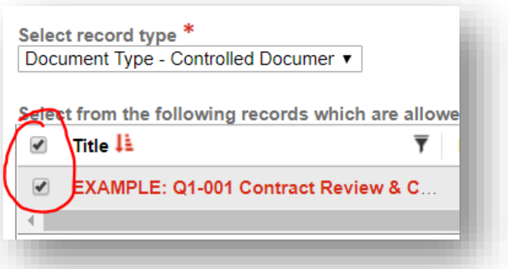


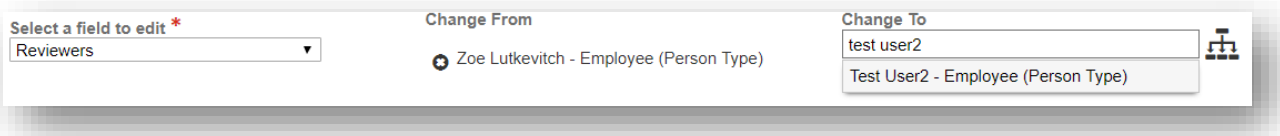
3) Once you have selected a record type the system will display all records that match your selection. If you want to change to all records, tick the box to the right of title or alternatively just select those records you want to change by manually ticking the field to the right of the title.



4) Click **Select a field to edit** select from the drop down list

5) Select **Change From** (type in the field or use the picker to select)

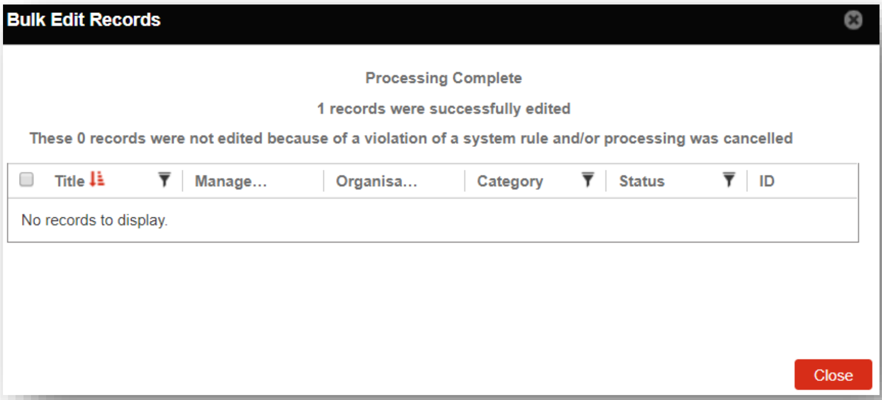
6) Select **Change To** (type in the field or use the picker to select)



7) Select **Execute Edits**

8) Click **OK** on the confirmation box

9) Once the re-allocation is complete you will get a message confirming how many records were processed successfully. Click **Close** on the message. If any records failed please contact the helpdesk (contact details at the end of this manual)

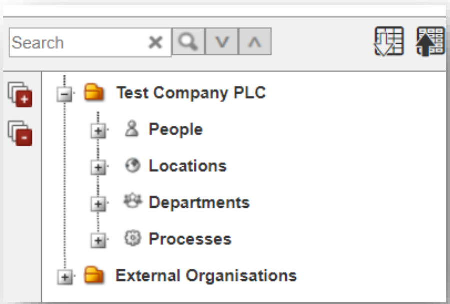


7. Creating Departments

Departments are informational tags for Entropy records. Departments can be tagged against any record type and used for filters in searches, queries and reports

1) Click **Organisation** then select **Structure** from the drop down menu

2) Select (highlight) **Departments** from the organisational tree on the left

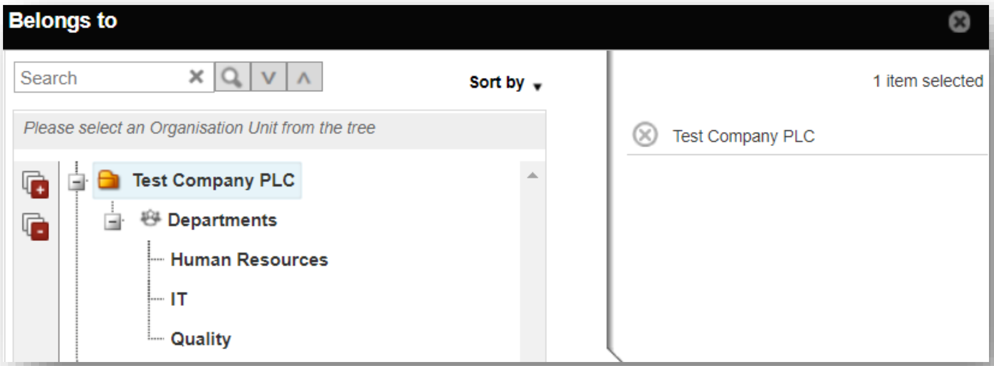


3) Click on the **Create** button 

4) Click the **Name** field and enter a name for your Department

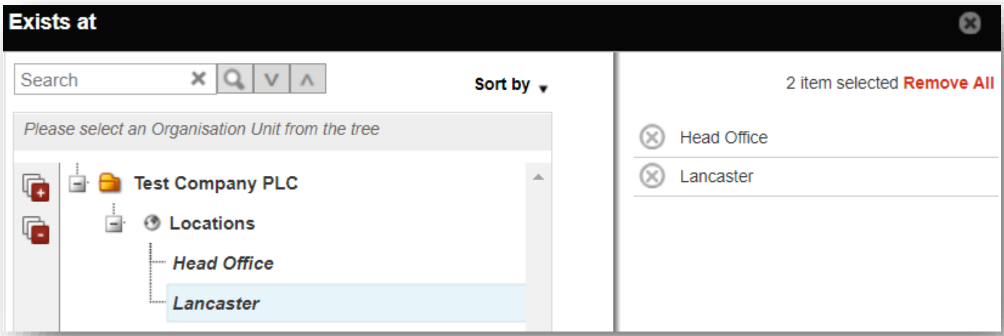
5) Click the **Description** field and enter a description for your Department (optional)

6) Click the **Belongs to** picker in the Belongs to section, a pop-up window will appear. Select the Organisation or Department (if it's a sub department) that your Department belongs to



7) Click **OK** to save your selection

8) Click the **Exists at** picker in the Belongs to section, a pop-up window will appear. Select Location where your Department exists at. If the department straddles multiple locations i.e. HR exists at all locations, select all that are applicable



9) Click **OK** to save your selection

10) Click the **Create** button located at the top of the page. You will be prompted to **Change the record status to Active?** Click **OK** to proceed

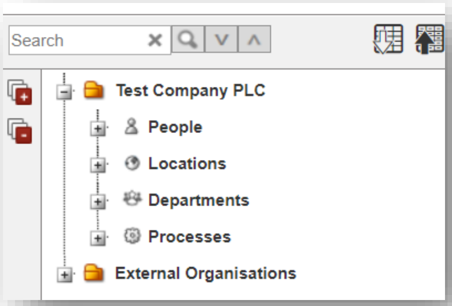
11) Click **Save**

8. Creating Processes

Processes are informational tags for Entropy records. Processes can be tagged against any record type and used for filters in searches, queries and reports.

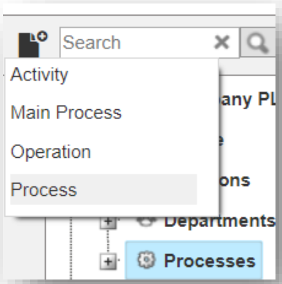
1) Click **Organisation** then select **Structure** from the drop down menu

2) Select (highlight) **Processes** from the organisational tree on the left



3) Click on the **Create** button 

4) Select the type of process from the list

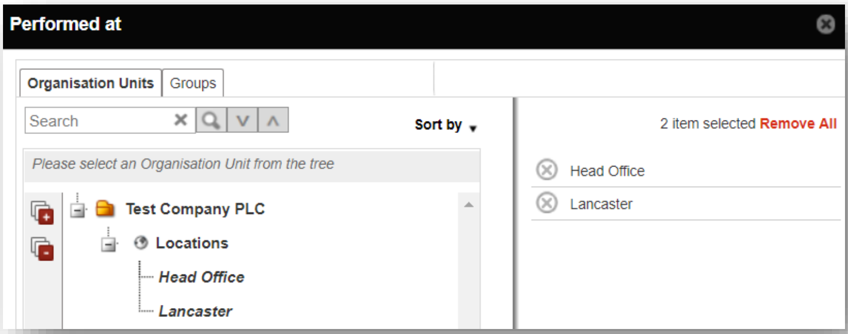


5) Click the **Name** field and enter a name for your Process

6) Click the **Description** field and enter a description for your Department (optional)

7) **Belongs to** will already show the name of your organisation

8) **Performed at**, enter the name of the location the processes is performed at, if the process is performed at multiple locations then select all applicable locations, click **OK** to update



12) Click the **Create** button located at the top of the page. You will be prompted to **Change the record status to Active?** Click **OK** to proceed

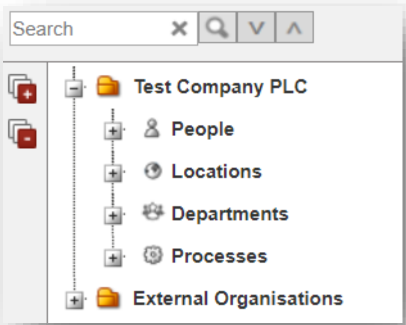
13) Click **Save** 

9. Creating External Organisations

External Organisations are informational tags for Entropy records, typically an external organisation is a supplier or customer who you want to make reference to in the records i.e. tagging a supplier NCR to a particular supplier.

1) Click **Organisation** then select **Structure** from the drop down menu

2) Select **External Organisations** from the organisational tree on the left



3) Click on the **Create** button 

4) Select the type of external organisation from the drop down: **Customer, Neighbour, Regulator, Supplier or Training Provider**

5) Click the **Name** field and enter a name for your External Organisation

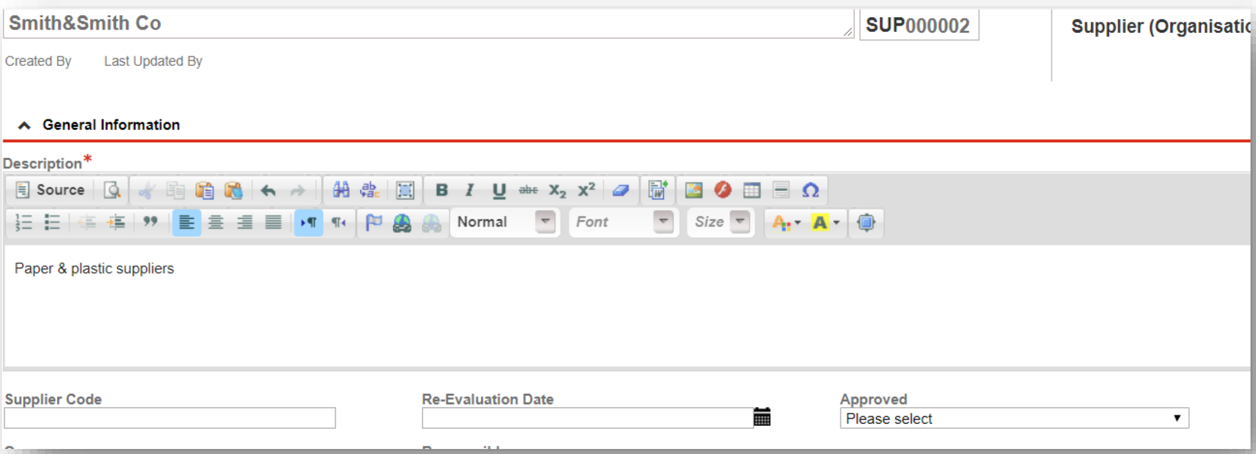
6) Click the **Description** field and enter a description for your External Organisation

7) Enter the **Supplier Code (optional)** Enter the **Re-Evaluation Date** (optional)

A pop-up calendar will appear

- Click on a date for your supplier re-evaluation
- Move the calendar hour and minute sliders to set a particular time for your supplier re-evaluation
- Alternatively, you can enter a date for your supplier re-evaluation directly into the re-evaluation field

8) Click the **Approved** field and select an approval status, if applicable



9) Select an **Owner**(s) for the External Organisation record, alternatively you can keep the record's default Owner (the default Owner is the user creating the record)

10) Click the **Management System** picker icon in the Management System section, a pop-up window will appear. Select any Managements System(s) you want to associate with your External Organisation from the Management System list, click **OK** to save your selection

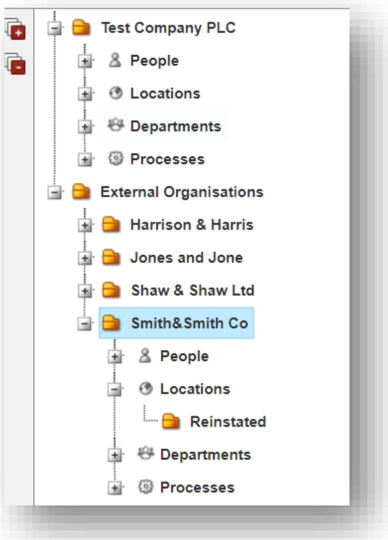
11) Click the **Primary Contact in Internal** picker, select the internal contacts you want to associate with this external organisation, click **OK** to save your selection

12) Click the **Primary Location(s) in Internal** picker, select the internal location you want to associated with this external organisation, click **OK** to save your selection

13) Click the **Create** button to change the status of your External Organisation to Draft

14) Once you have created your External Organisation you will need to associate a location to the external organisation.

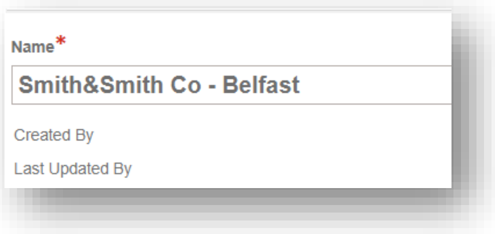
15) Expand the organisation you have created and click on **Locations**



16) Click on the **Create** button 

17) Select **Location** from the drop down menu

18) In the Name field, enter the name and the location of the external organisation i.e.



19) Enter the address in the address section

20) Click the **Activate** button followed by **OK** to activate your External Organisation

10. Creating Categories

A category is an informational tag for an Entropy Record. For example, when raising findings or actions, you may want to associate them to a category, you can then report on how many findings of a particular type have been linked to a particular category.

Entropy comes pre-configured with a number of categories; these categories can be edited/removed as necessary.

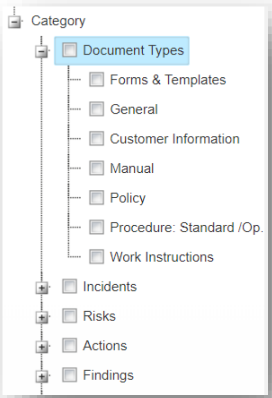
10.1 Creating a new Category

1) Click **Administration** then select **Categories** from the drop down menu

2) Click the **Plus** icon, next to the Category folder on the left of your screen, to expand the Category folder

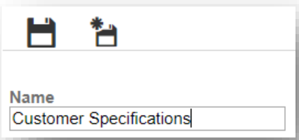
3) Select a folder within the Categories tree on the left

- Select the Category folder to create a first level Category
- Select an existing first level Category to create a second level Category



4) Click on the **Create** button

5) Click the **Name** field and enter a name for your Category



6) Click **Save**

Tip: You can drag and drop Categories to your preferred locations from within the Category tree

10.2 Deleting a Category

1) Click **Administration** then select **Category** from the drop down menu

2) Click the plus icon next to the category folder on the far left to expand the folder

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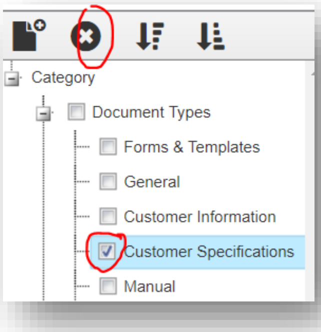
3) Click the plus icon next to any second level folders to expand

4) Click those categories that you wish to delete

5) Click the delete icon, you will be required to confirm the deletion, click **OK** to proceed



11. Creating Causes

Findings and Incident Investigations allow you to tag root cause information. You are then able to search, sort and report on records in Entropy by 'root cause', i.e. how many non-conformances have occurred due to 'lack of training' or 'lack of documentation'.

11.1 Creating a New Cause

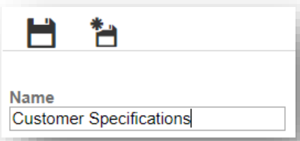
1) Click **Administration** then select **Causes** from the drop down menu

2) Select a folder within the Causes tree on the left

- Select the Causes folder to create a first level Cause
- Select an existing first level Cause to create a second level Cause

3) Click on the **Create** button 

4) Click the **Name** field and enter a name for your Category



5) Click **Save** 

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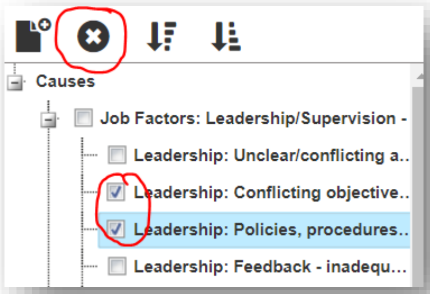
Tip: You can drag and drop Causes to your preferred locations from within the Cause's tree

11.2 Deleting a Cause

1) Click **Administration** then select **Causes** from the drop down menu
2) Click the Plus icon next to the causes folder on the far left to expand the folder
3) Click the Plus icon next to any second level folders to expand
4) Click those causes that you wish to delete
5) Click the delete icon, you will be required to confirm the deletion, click **OK** to proceed



12. Recycle Bin

Only Administrators have access to the recycle bin. If a record is deleted from Entropy it will be placed into the recycle bin, from here it can be permanently deleted (unrecoverable) or restored to its original location

1) Click **Administration** then select **Recycle Bin** from the drop down menu
2) There are three useful columns you can search, sort and filter to find the deleted record (use the filter icon to search key words/dates or use sort to sort alphabetically/numerically)
   - Title
   - Record Type
   - Last Updated
3) When you have located the deleted record select the record by placing a tick in the box to the left
4) Click **Change Status**
5) From the drop down menu select **Remove** to permanently delete the record or **Restore** to move the record back to its original location

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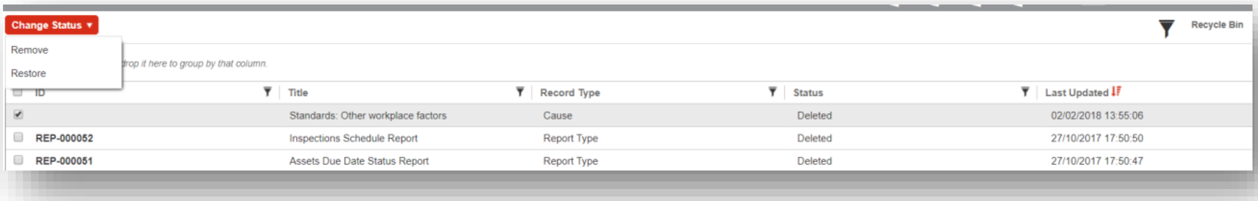


6) Click **OK** to update changes

7) Click **Save**

13. Creating an Email Notification

Email notification rules can be created to inform people of activity within the system, e.g. when a Non-Conformance or an Action has been created, is due for completion, or has gone overdue.

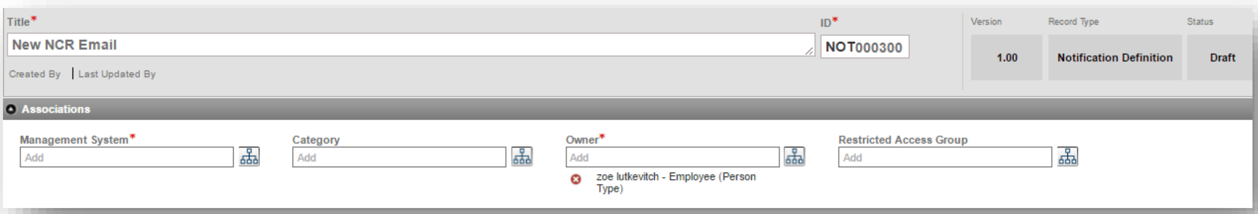
This guide shows you how to create a basic notification rule for a new Non-Conformance record (the principle is the same for other record types).

1) Click **Administration** from the menu bar, select **Notification Definitions** from the drop down menu

2) Click the **Create** button

3) Enter the **Title** of your email notification (ensure you add a title that will help you to identify what type of notification this is)

4) Enter the Associations:



- **Management System** picker, a Management System pop-up window will appear. Select the Management System(s) you want to associate with your Email Notification (if you have multiple Management Systems select all unless you intend to create the same email notification for each Management System)
- All other fields in the **Associations** panel are optional. The email notification **Owner** field is pre-populated and shouldn't require changing

5) Enter the **Description** of your email notification (ensure you add a description that will help you to identify what this notification does/its purpose)

6) **Effective to Date** – only use this field if you want to limit how long the email notification will run

7) Go to the **Event** tab

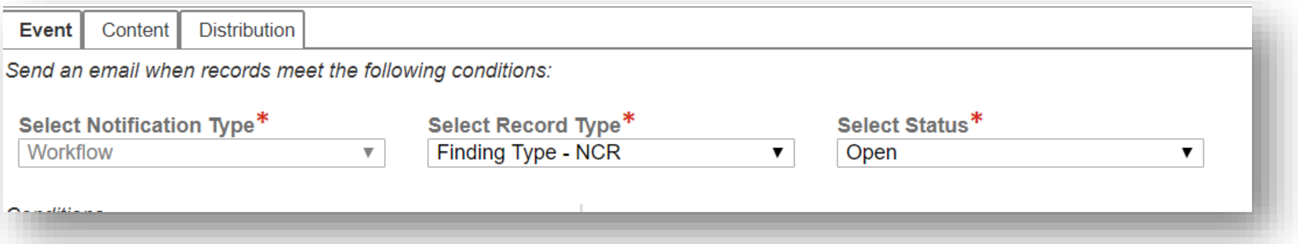
8) Select from the **Notification Type** drop down menu the type of notification you are creating:

- **Record Changes** will generate an email for any changes to the record i.e. you might want to set up a notification on the due date field, if this is changed a notification will trigger
- **Calendar** will generate an email for tasks based on dates
- **Workflow** will generate an email as a record is transitioned (this is the most common type of email notification)
- **Record Date** will generate an email based record dates i.e. notify a lead investigator 5 days before the audit due date
- **Overdue** will generate an email to notify the recipient a particular record has gone overdue
- **Recurring** used to ensure records are addressed in a timely manner by notifying people on a daily (or lesser) basis if a record is not progressing; and escalate notifications to others as needed, e.g., for every day an Incident remains open, people are notified/reminded, and then escalations are sent to selected people if still open after x days.

9) Select Workflow from the notification type

10) Select **Finding Type - Non-Conformance** from the Record Type drop down menu

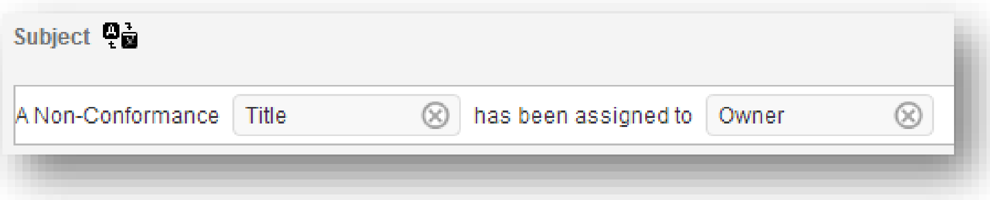
11) Select **Open** from the Status drop down menu



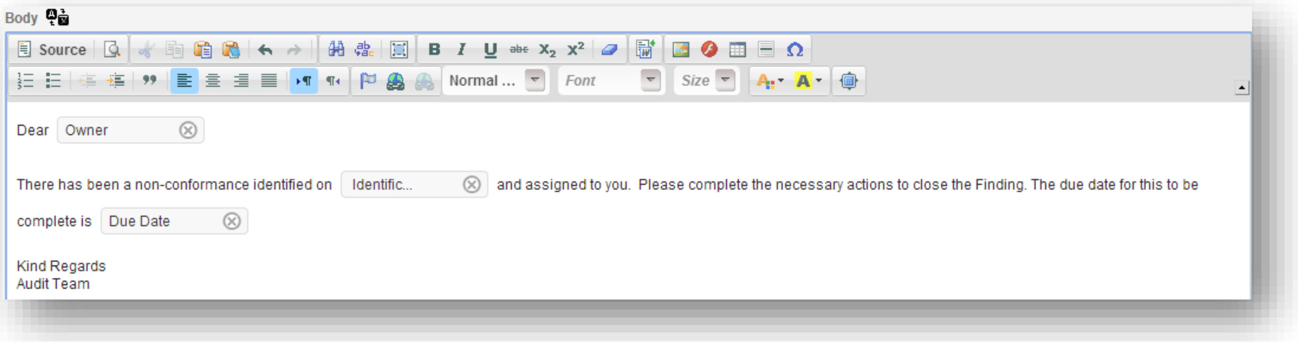
12) Click the **Content** tab, you are now going to create the content of the email notification

13) In the **Subject** of the email notification. Use the **Dynamic Fields** to enter information such as owner or title (a dynamic field is a field that contains record specific data that can be pulled through from the database, such as the Title, Due Date & Owner fields)

14) To add a dynamic field click on **Record Role** or **Fields** drop down menu, select the dynamic field and click **Insert**.

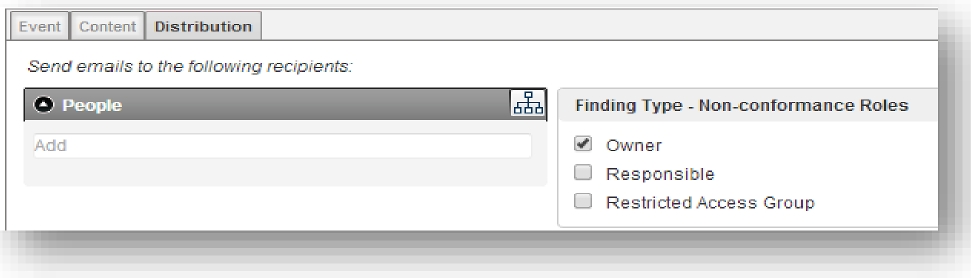


15) Enter the **Body** of the email notification. Again, use the dynamic fields to add dynamic information to the email



16) Click on the **Distribution** Tab and select who the email will be distributed to

17) You can choose to send the email to individuals by selecting them from the **People** picker, by using **Roles,** or a mixture of both



18) Click **Save**

19) Click **Activate** to make the notification rule active. The status will change from Draft to Active (emails will not trigger unless Active)

14. Editing/changing an Email Notification

1) Click **Administration** from the menu bar, select **Notification Definitions** from the drop down menu

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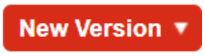
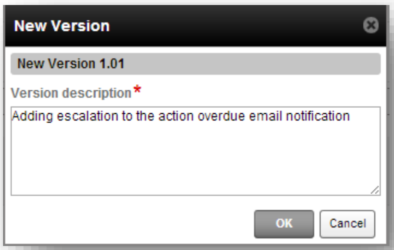
2) Select the title of the email notification you wish to edit (in this example Corrective Action – Action Overdue will be used)

3) Click New Version 

4) Decide if the change will be a **Minor** or **Major** version change, click **OK** to the confirmation message

- Saving a major version will increase the version number by a whole number
- Saving a minor version will increase the version number by a decimal point

5) Enter a reason for the version change, click **OK**



6) The Record is now in status **Draft**

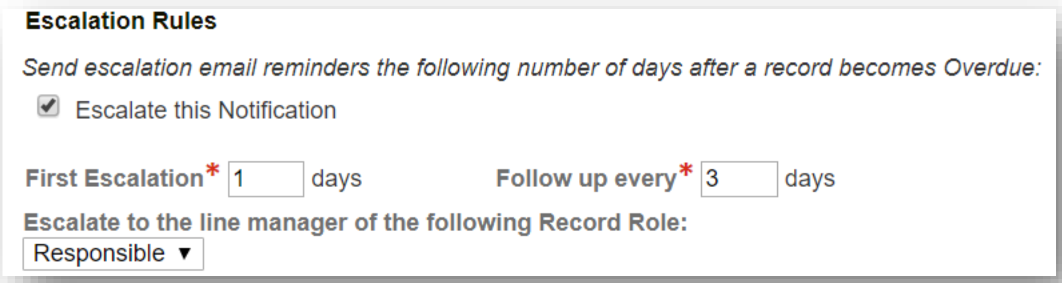
7) Decide what information you want to change, all information in a notification email can be edited apart from the **Notification Type**

8) In this example, **Escalation** is going to be added to the email notification

9) Select **Escalate this Notification**

10) Enter the number of days the first escalation email should be sent and then the follow up emails

11) Using the drop down menu, select who should receive the escalation email



12) Click the **Content** tab & the **Distribution** tab, ensure the email content is correct and the email is going to the correct people.

13) Click **Save**

14) Click **Activate** to make the notification rule active. The status will change from Draft to Active (emails will not trigger unless Active)

15. Business Roles

Business roles allow you to group users and people account together into groups. For example you may want to create an 'all staff' group within Entropy and then assign all of your user and people accounts to this group.

Business roles are primarily created to allow you to tag a group to a record rather than individuals i.e. you may want to notify the group 'Directors' to an Incident that has occurred.

The most common use of a business role in Entropy is assigning multiple people a training need simultaneously rather than allocating individually.

15.1 Creating a Business Role

1) Click **Administration** then select **Business Roles** from the drop down menu

2) Click on the **Create** button

3) Click the **Title** field and enter a name for your business role

4) Use the **Management System** picker and click the plus symbol to select the Management System(s)

5) Select **OK** to save the changes

6) If you have more than one location, ensure the correct is chosen in the **Organisation Scope – Location (Internal)** field

7) Next add the **Members** to the business role using the picker

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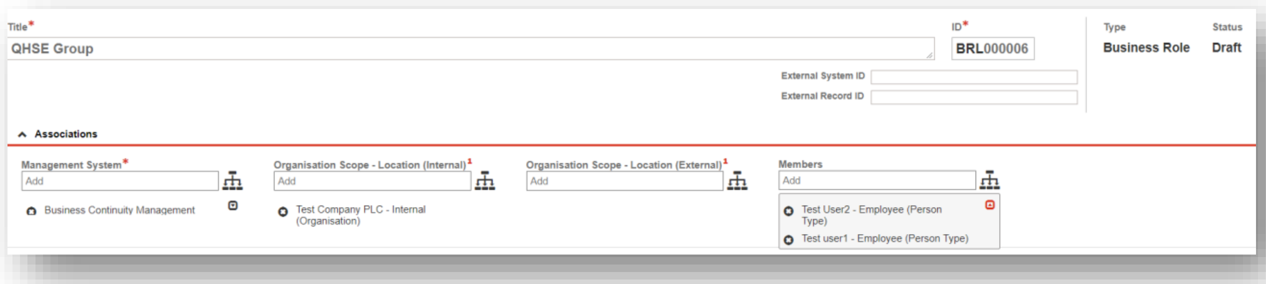

8) Click **Save**

15.2 Removing members from a Business Role

1) Click **Administration** then select **Business Roles** from the drop down menu

2) Locate and open the business role by clicking the title

3) Go to Members and click the collapsed list icon to display all of the members

4) Click the icon to the left of the members name to remove them or alternatively click the picker which will display the names of the members in a table, click the symbol to remove the members. Click OK to save the changes

16. 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

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17. Revision History

Version	Reason	Date	Author
V1.00	Initial version		ZL
V1.01	Changes and updates		ZL
V1.02	Changes due to re-skin & new sections added	30.01.18	ZL
V1.03	Added email notification section, rewrote 'removing user' section - added mobile app access profile	21.08.18	ZL
V1.04	5.5.17.0 Functional changes - added event queue acceptor access profile	08.05.19	ZL
V1.05	Updated the recommended access profile table	22.04.2020	ZL
V1.06	Formatting	17.07.20	ZL