

# Getting Started with Entropy

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## Getting Started with Entropy

In this section we will introduce you to navigation in Entropy, from following the link in your Entropy Activation email, to creating and saving a record.

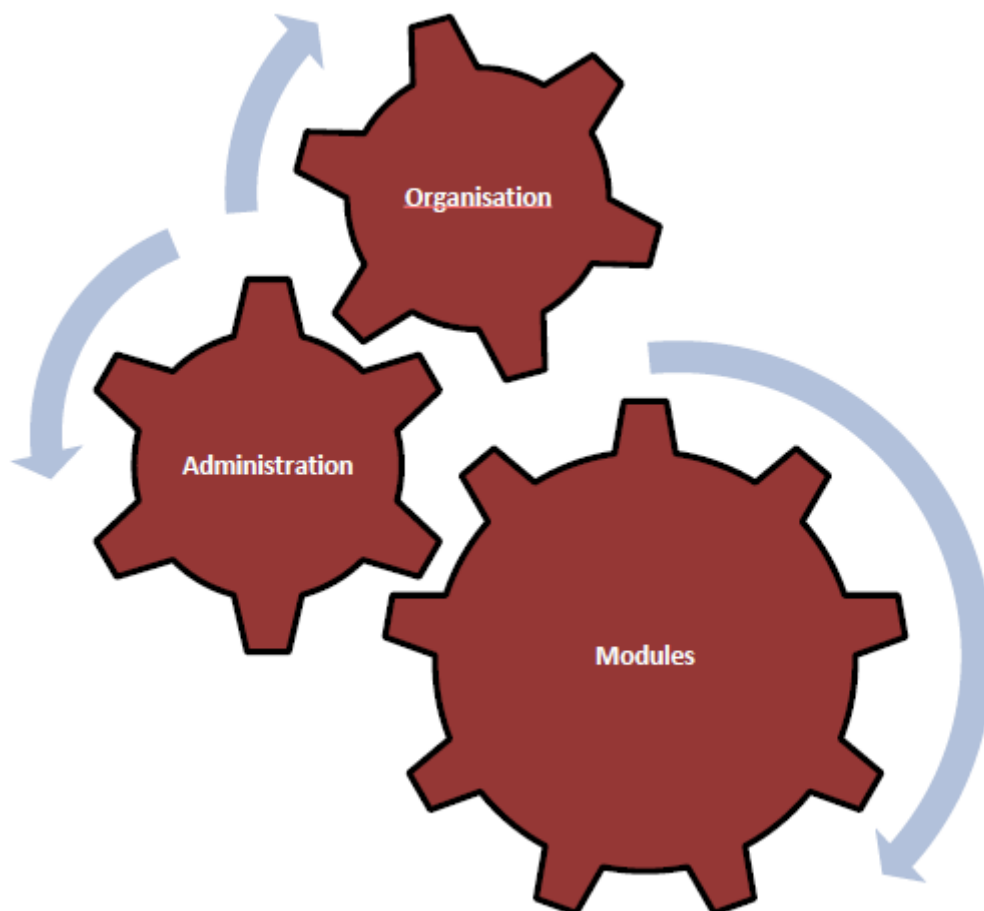
### 1. Introduction

BSI's Entropy Software is web based software. Utilising Entropy tools will enable you to efficiently create, edit and transition your organisation records such as Actions, Non-conformances and Procedures.

Entropy includes specific workflow which allows you to approve, accept, verify and review your organisation's records. Those individuals in your organisation, who have the authority to approve, accept, verify or review your organisation's can be set-up in Entropy to receive notifications of their pending tasks.

The flexibility of Entropy's software tools will allow you to adapt Entropy to the needs of your organisation.

Entropy Software contains three interconnected sectors: Organisation, Administration and the Modules.

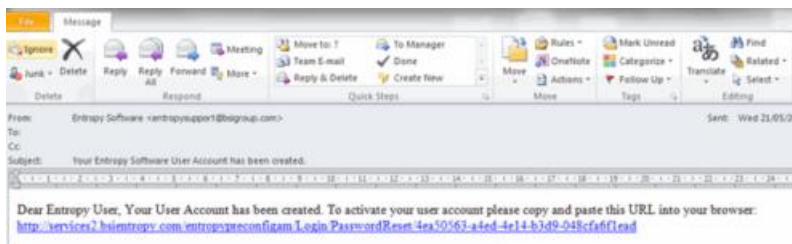


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Entropy's core functions occur in the Compliance, Knowledge and Incident modules. However, before you can begin using Entropy's core functions you will need to enter your organisation's users, locations, departments and processes using Entropy's Organisational tools. Additionally, you will need to enter your organisation's management systems, categories and causes using Entropy's Administration tools.

## 2. Activation Email & Password Creation

- 1) By now you will have received your Entropy activation email as below



- 2) Click the Link in the email, and you will be redirected to the **Create New Password** screen

Create New Password

Username

New Password

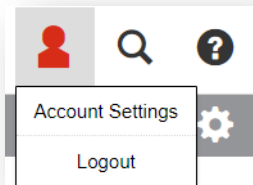
Confirm New Password

Set Your Time Zone

Required. You can change your time zone at any time in the Account Settings screen.

- 3) Type in a password in the **New Password** and **Confirm New Password**  
Note: Passwords are a minimum of 8 characters and must contain at least one letter and number
- 4) Using the drop down list, select your **Time Zone**
- 5) Click **Login**
- 6) You have now successfully logged into Entropy
- 7) To log out of Entropy, click the person icon in the top right hand corner of your screen

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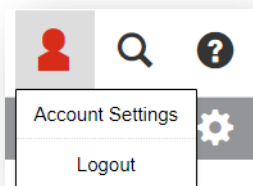


- 8) Click the **Logout** button
- 9) This will take you back to the **Entropy Login** screen. At this point it is advisable to add Entropy to your browser's bookmarks

### 3. Activating a Secondary Authentication Password (e-signature)

If your Management System(s) require secondary authentication password (e-signature), follow the steps below

- 1) Click the person icon in the top right hand corner



- 2) Click **Account Settings** from the drop down menu
- 3) Select **Secondary Authentication Password** in the Change Password section, the following screen will open

A screenshot of a web form titled 'Configure Your Secondary Authentication Password'. It contains two input fields: 'New Password' and 'Confirm New Password'. Below the fields is a red 'Save' button. At the bottom of the form, there is a red link labeled 'Password Reset'.

- 4) Click the **New Password** and **Confirm New Password** fields and enter a new secondary authentication password
- 5) Click the **Save** icon to apply changes

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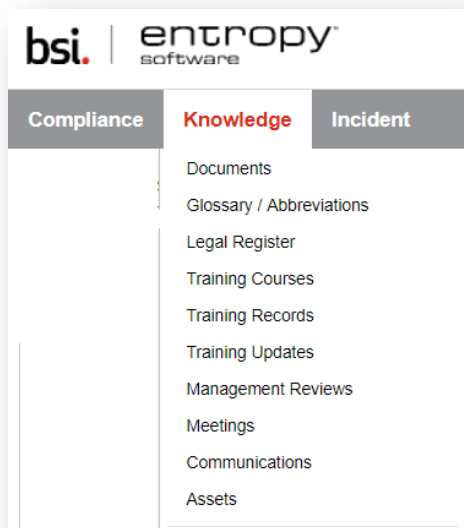
## 4. Navigation

Entropy is comprised of 9 main areas:

- **Compliance** – This is the area where you can create records, such as non-conformances and actions
- **Knowledge** – This is the area where you can create your document records, such as procedures, policies, forms. There is also a simple training tool which allows you to create and assign training needs to your users
- **Incidents** – This is the area where you can log your incidents and near miss records
- **Quick Links** – Use these quick links to save time when creating documents, findings, incidents and actions
- **Dashboards** – There are a number of dashboards you can set up within the Entropy system, please refer to the Searching, Querying, Dashboards and Reporting user manual found [here](#)
- **Reports** – This area comes with a number of pre-built reports available for you to run e.g. Action Summary Report, please refer to the Searching, Querying, Dashboards and Reporting user manual found [here](#)
- **Calendar** - The centralized calendar displays due dates for:
  - Audit records
  - Quick Audit records
  - BSI Audits & Findings
  - Action records
  - Finding records
  - Recurrent Action records
  - Legal Register reviews records
- **Organisation** – This is the area where you will add your people, locations, departments, processes and much more
- **Administration** – This is the area where you will define your management systems, set up categories, create email notification rules and much more

When you click on one of the modules (**Compliance, Knowledge or Incidents**) or the **Administration** or **Organisation** menus, you will be presented with a dropdown menu that will look similar to this:

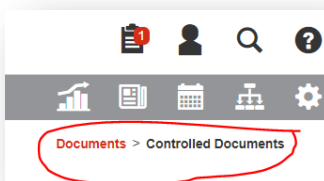
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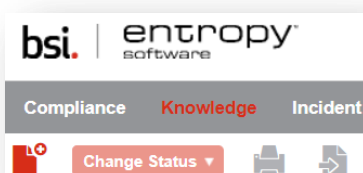
- 1) To navigate to a tool you wish to use e.g. **Documents**, first click on the **Knowledge** module scroll down and click the Documents from the menu. Alternatively you can click the document quick link icon on the menu bar:



- 2) You will always know what tool you are viewing in Entropy by looking at the navigation bar (breadcrumb) in the far right hand corner under the menu bar







- 3) To create a new record, e.g. a **Document**, click the **Create**  icon. In some tools, like **Documents**, you will see another dropdown if there is more than one type of document record available



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- 4) Scroll down the list and select the type of record you wish to create
- 5) This will take you into a new record screen

- 6) Fields marked with an asterisk \* must populated before you can save a record. If you attempt to save a record without a mandatory field being completed, the system will let you know via a warning message at the top of the screen.
- 7) The following icons exist in every record in Entropy (for a full list of the icons you will see in Entropy, please navigate to the end of this document or [click here](#)):
  -  **Back**, click this to take you back to the previous screen
  -  **Save**, click this to save your record
  -  **Create**, click this to create a new record
  -  **Save & New**, click this to save your current record and open a new, blank record. This is useful if you are creating a number of records one after another.

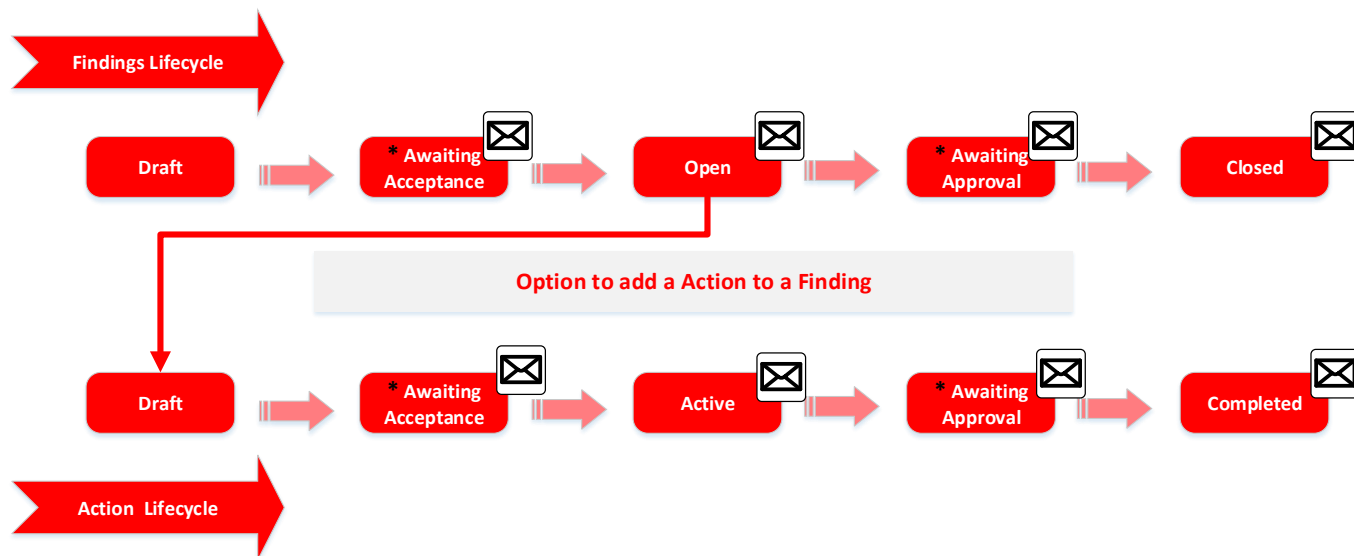
## 5. Record Lifecycle


Different record types have different workflow. A Finding for example is any event that you wish to capture and Actions can either be stand alone or linked to Findings. The workflow below details the relationship and statuses of the Finding and Action record type.

Within Findings and Actions, optional decision gates for Awaiting Acceptance and Awaiting Approval may either be turned on or left turned off based on your organization's needs.









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









 Opportunity to send a Notification      \* Optional decision gate

## 6. Icon and quick link Definitions

Icon	Definition	Location
	<b>Documents</b> Click on this quick link to create a Document	Menu bar
	<b>Findings</b> Click on this quick link to create a Finding	Menu bar
	<b>Incidents</b> Click on this quick link to create an Incident or Near Miss	Menu bar
	<b>Actions</b> Click on this quick link to create an Action	Menu bar
	<b>Dashboards</b> Click on this icon to access the Dashboards	Menu bar
	<b>Reports</b> Click on this icon to access the Reports	Menu bar
	<b>Calendar</b> Click on this icon to access the Calendar	Menu bar
	<b>Organisation</b> Click on this icon to access the Organisation Menu (Administrators only)	Menu bar

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	<b>Administration</b> Click on this icon to access the Administration Menu (Administrators only)	Menu bar
	<b>Tasks</b> Click on this icon to view your tasks	Logo bar
	<b>User</b> Click on this icon to view your account settings and to log out	Logo bar
	<b>Help</b> Click here for Entropy help and to check the Entropy version number	Logo bar
	<b>Filter</b> Use this icon to filter/search data	All record lists
	<b>Sort</b> Use this icon to sort data. You can sort data by text (A to Z or Z to A), numbers (smallest to largest or largest to smallest), and dates and times (oldest to newest and newest to oldest)	All record lists
	<b>Create</b> Click this icon to create a new record/new information within a record	All record types
	<b>Print</b> Click this icon to print	All record lists
	<b>Export</b> Click this icon to export data out of Entropy	All record lists
	<b>Back</b> Click this icon to navigate back	All record types/lists
	<b>Edit</b> Click this icon to go into record 'edit mode'	All record types
	<b>Detailed View</b> Click this icon to go into record 'detailed view mode'	All record types
	<b>Extended View</b> Click this icon to go into record 'extended view mode'	All record types
	<b>Save</b> Click this icon to save a record/information within Entropy	All record types and areas where save is an option
	<b>Save and New</b> Click this icon to save a record/information and automatically start a new record within Entropy	All record types and areas where save & new is an option
	<b>Tree</b> Click this icon to access the tree structure i.e. Category tree, Cause tree, People tree, Location tree, Supplier tree etc.	All record types and areas where the tree pick-list is an option

	<b>Calendar</b> Use this icon to select a date from the calendar	All record types that have a date field
	<b>Overdue Flag</b> This icon indicates that a record is 'overdue'	All record types that have due dates
*	<b>Required (mandatory) Field</b> This icon indicates that a field is mandatory	All record types that have mandatory fields
	<b>Copy</b> Click this icon to copy a record	All record types that have the copy function
	<b>Permalink</b> Click this icon to create a permalink	Documents
	<b>Collapsed list</b> If you see this icon it means there are more items to see i.e. if you select multiple Management Systems in a record the list will be collapsed with more items to view	Associations section of a record
	<b>Delete</b> Delete an item from a record	All record types with fields that can be deleted
	<b>Tooltips</b> Some fields will have tooltips, hover over the icon to reveal the tip	All record types that have tooltips

## 7. Summary

After following this section, you should now be able to do the following:

- Follow the link to create your password
- Log in and log out of Entropy
- Setting up an e-signature
- Navigate to each of the 9 main areas
- Use the menu bars and quick link icons to select a tool and create a new record
- Complete the mandatory\* fields
- Save a record
- Understand the workflow and statuses of records
- Understand the different icons within Entropy

## 8. 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](mailto:entropy.support@bsigroup.com)

Tel: +44 (0)345 5049524

### For USA & Americas

Email: [entropysupport@bsigroup.com](mailto:entropysupport@bsigroup.com)

Tel: 1+ 888 640 6776

## 9. Revision History

Version	Reason	Date	Author
V1.00	Initial version		ZL
V1.01	Changes and updates	n/k	ZL
V1.02	Changes due to re-skin	29.01.18	ZL