

BSI Entropy Connect Mobile App & Event Queue User Guide

Contents

1. Introduction	3
2. Mobile App Process Map	3
3. Administration	4
3.1 Setting up Mobile User Accounts	4
3.1.1 Access Profiles	4
3.1.2 How to....Create a Mobile App Account for an existing Entropy user	4
3.1.3 How to....Create a Mobile App Account for a non-Entropy user.....	6
3.2 How to....Set up Event Queue Acceptors	9
3.3 How to....Set up Event Queue email notification.....	10
4. Downloading and Logging into the Mobile App	11
4.1 How to....Download the BSI Connect App.....	11
4.2 How to....Login/Register your mobile app account.....	13
4.2.1 How to....Logging into the app for the first time (Existing Entropy User)	13
4.2.2 How to....Logging into the app for the first time (non-Entropy User).....	14
4.3 Mobile App Account Settings	15
4.3.1 How to....Set up Fingerprint ID.....	15
4.3.2 How to....Change your password via the mobile app	16
4.3.3 How to....Change your Default Location on the mobile app	17
4.3.4 How to....Forgot Password	17
5. Creating an event via the mobile app	18
5.1 How to....Create and Submit an Event.....	18
5.1.1 How to....Add photos & Videos to your event.....	19
5.1.2 How to....Add annotations to your event	19
5.1.3 How to....use the mobile app offline.....	21
6. Logging an Event without the Mobile App	22
7. Processing an event	22
7.1 How to....Process an event from the event queue	23
8. Additional Support	25
9. Revision History	25

1. Introduction

BSI Entropy Connect is Entropy’s first mobile app. The app will have a lighter look and feel than the Entropy system enabling, non-users of the full system to record events quickly and easily.

The current version of the mobile application includes:

Logging of Incidents (Android and iOS)

- Near Miss
- Injuries
- Illness
- Spills
- Generic (e.g. IT Security, property damage, RTA)

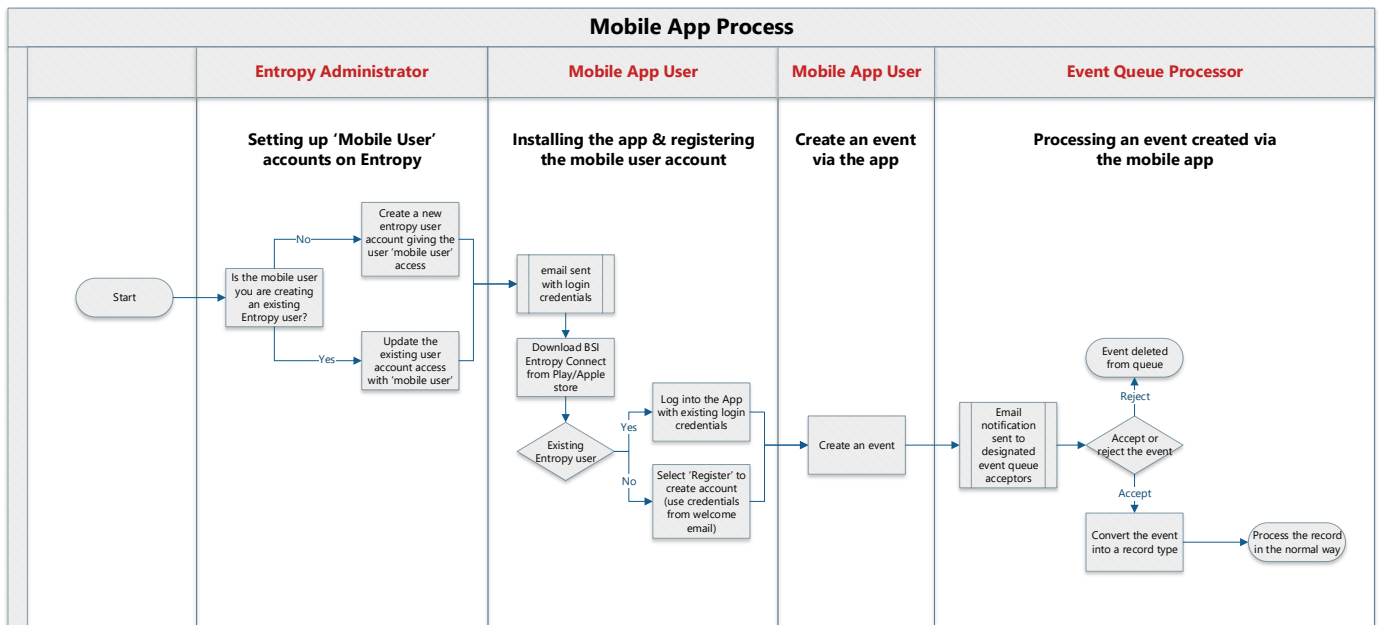
Logging of Findings (Android and iOS)

- NCRs
- Observations
- Opportunity for Improvement
- Complaints/feedback

Conducting Audits (iOS only at present)

We will continue to develop the mobile application to offer more functionality, such as the capability to conduct audits on Android devices.

2. Mobile App Process Map



3. Administration

There are two steps an Entropy Administrator is required to complete to enable Mobile App usage:

- 1) Set up mobile user accounts
- 2) Create an email notification to tell the 'event queue processor' when a new event has been created

Please note, only users with **System Administrator** privileges will be able to create mobile user accounts and set up email notifications.

- The mobile account that you are setting up, does the person already have an account in Entropy? If the answer is yes, [click here](#).
- If the person you are setting up does not have an Entropy account, [click here](#).


3.1 Setting up Mobile User Accounts


3.1.1 Access Profiles




Below are the associated access profiles for the mobile app:

Access Profile	Permissions
Mobile User	All users require Mobile User to use the mobile app
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
System Administrator Compliance Super User Compliance Manager Incident Super User	Users with these access profiles can see the event queue and process events

3.1.2 How to....Create a Mobile App Account for an existing Entropy user

- 1) Click **Administration**  from the menu bar, select **User Management** from the drop down menu
- 2) Locate the user from the user grid, click the edit icon to the left of the username (as highlighted in yellow in the image below) or simply click on the username





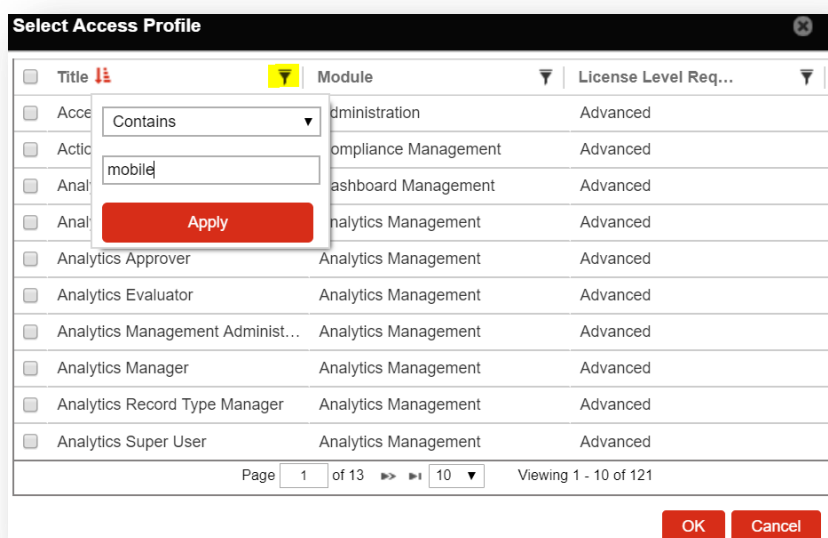
	Username 	First Name	Last Name	Status	Organisat...	Based at	Reports to	Last login	Total Logi...	ID	
	robotestuser1	robotest1	user	Active	Warephase Mfr, Ltd	Headquarters	robosoft dev	12/02/2018 08:26	0	USR-000006	
	testuser	Test	User	Active	Warephase Mfr, Ltd	Lancaster	Warephase Mfr, Ltd		0	USR-000207	

- 3) You will then be taken into the **User** tab (located at the top of the record). Scroll down until you locate the **Access Profile** section

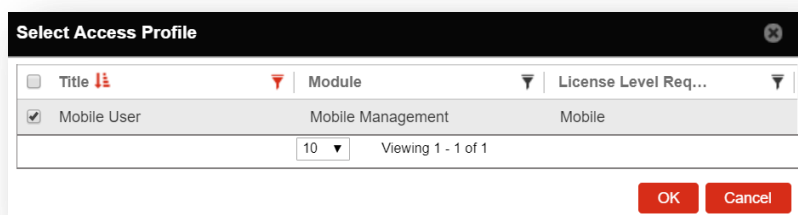
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- 4) Click create 
- 5) Locate the access profile **Mobile User**.

Tip: Filter or search the access profile list. At the top of the access profile list, 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**




- 6) You will be presented with the access profile(s) that meet your search criteria

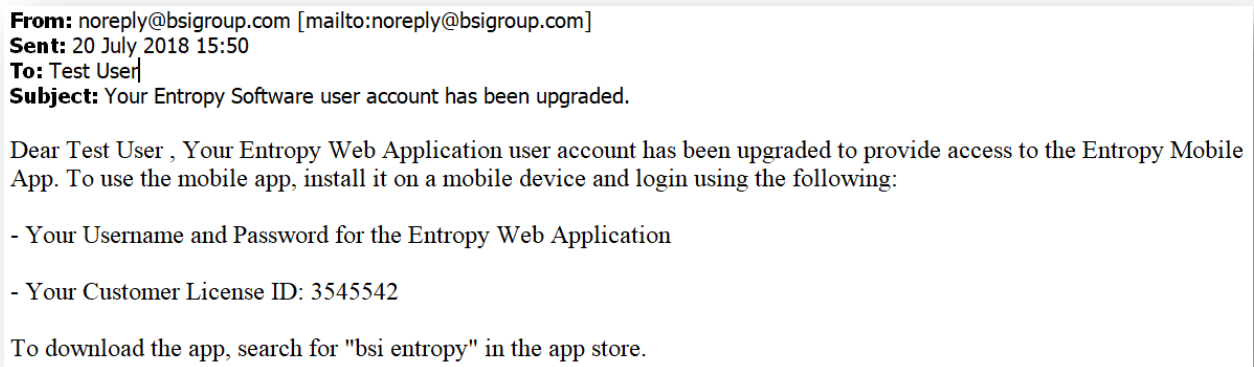


- 7) Tick the access profile and click **OK** to save the profile
- 8) Once the access profile has been selected, the users account will look something like this:





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
- 9) Click save  to apply the changes
- 10) The Entropy user will receive an email inviting them to download the mobile app and login using their existing Entropy credentials

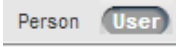



3.1.3 How to....Create a Mobile App Account for a non-Entropy user

- 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. Click the location the user is associated with.
- 8) Select **OK** to save the changes
- 9) Click **Next** to proceed to the next step



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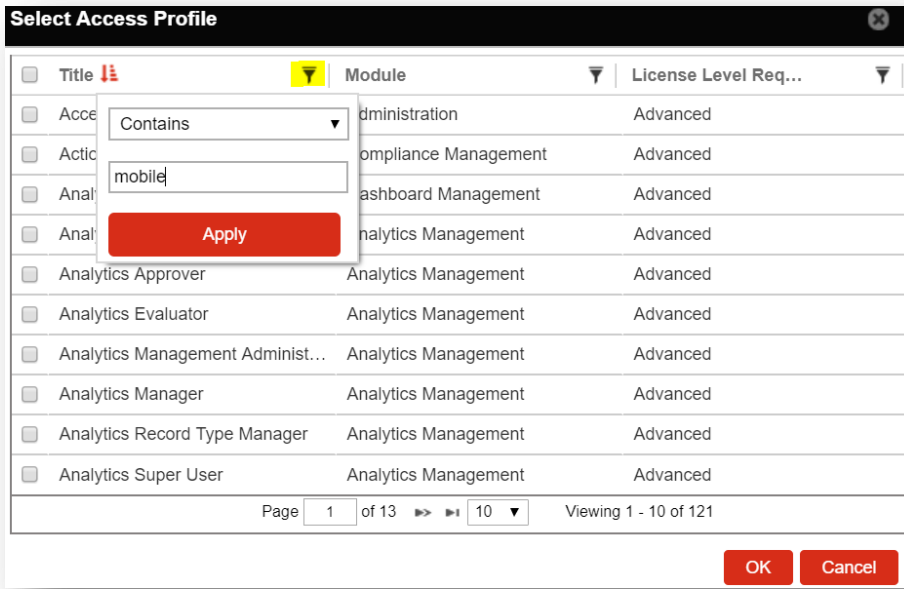
- 10) Enter the **First Name, Last Name & Email** of the person you are creating. All other contact, personal and organisational details are optional
- 11) Verify the **Reports to** and **Based at** details are correct, if not, these can be changed by clicking the picker  and selecting the correct details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

- 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 
- 13) From within the user tab, enter the **Username** in the 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)

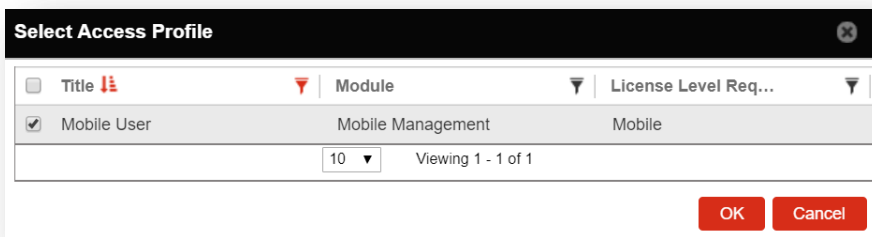
- 14) Scroll down until you locate the **Access Profile** section
- 15) Click create 
- 16) Locate the access profile **Mobile User**.

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Tip: Filter or search the access profile list. At the top of the access profile list, 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**

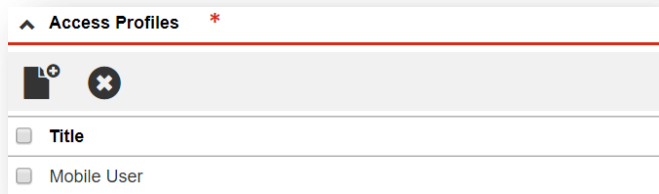



17) You will be presented with the access profile(s) that meet your search criteria

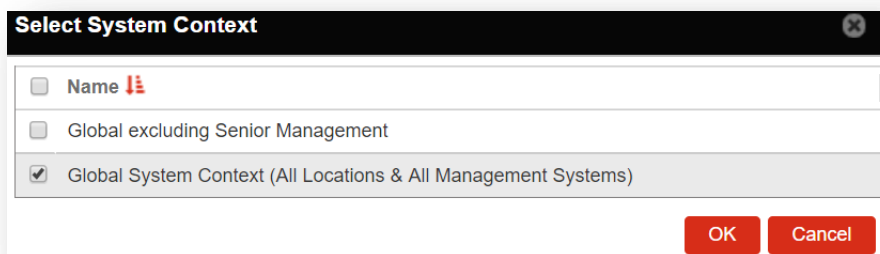


18) Tick the access profile and click **OK** to save the profile

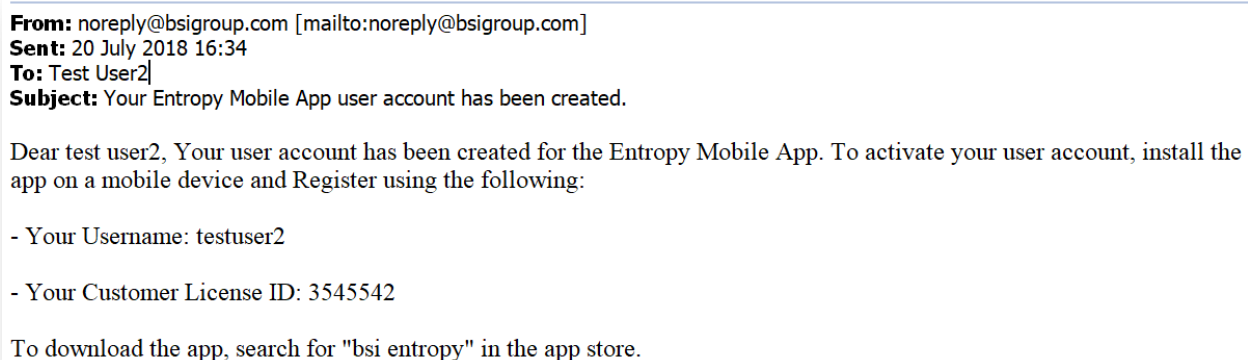
19) Once the access profile has been selected, the users account will look something like this:



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



- 23) Click **Create User**
- 24) The Entropy user will receive an email inviting them to download the mobile app and login using their existing Entropy credentials



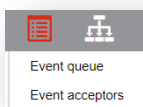
3.2 How to....Set up Event Queue Acceptors

This section explains how to set up designated Event Queue Acceptors (event queue acceptors are those users you have identified as requiring notification when a new event is created e.g. a near miss created via the mobile app or an event created via 'Log and Event')

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When an event comes through from the mobile app or the new event logging from the home screen users assigned to manage events for particular locations (as set up in the event queue acceptor page) will be notified when a new event has been created (they would then be responsible for allocating processing the event into a record and assigning ownership)

- The Event Queue Acceptors menu is available to system administrators and those users who have superuser access to modules i.e. compliance superuser
 - To set a user up as an Event Queue Acceptor they will need to be given the new access profile 'Event Queue Acceptor' (more information below)
 - Be aware that a user with the role event queue acceptor can still accept events for locations where they are not the 'designated' acceptor
 - If an event has more than one acceptor, then the event will be transitioned according to whatever the first acceptor does
- 1) Click the Event Queue icon located on the menu bar
 - 2) Select **Event acceptors** from the drop down menu





- 3) There are two tabs, **Location Acceptors** – allows you to allocate users for different locations or **Default Acceptors** – allows you to allocate one or more users to be the acceptor for all events regardless of locations
- 4) In the **Acceptors** field add the name of the users (do this by typing their name directly into the field or using the picker)

Location Name	Organisation Name	Acceptors	Status
Head Office	Test Company PLC	<input type="text"/> Test user1 - Employee	Valid
Lancaster	Test Company PLC	<input type="text"/> Test User2 - Employee	Valid

- 5) Click save  to apply the changes

3.3 How to....Set up Event Queue email notification

Any Entropy systems created after Oct 2018 will already have this email notification set up and you will only need to complete step 6 & 7 below. For all other systems created prior to Oct 2018 please follow steps 1 - 7 below:

- 6) Click **Administration**  from the menu bar, select **Notification Definitions** from the drop down menu
- 7) Click create 
- 8) Enter the following:

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- Title – **New Event Queue Record**
 - Management System – using the picklist, select all management systems
 - Description – enter a brief description for the email
- 9) Under the **Event** tab:
- Select Notification Type – select **Workflow**
 - Select Record Type – select **Event Type – Event**
 - Select Status – select **Open**

- 10) Under the **Content** tab, create the email subject and email body. Use the **Fields** tab to add dynamic fields such as dates and description (as shown below)

- 11) Under the **Distribution** tab, under **Event Type – Event Roles** tick **Event Acceptor**
- 12) Click **Activate**, the email notification is now live


4. Downloading and Logging into the Mobile App

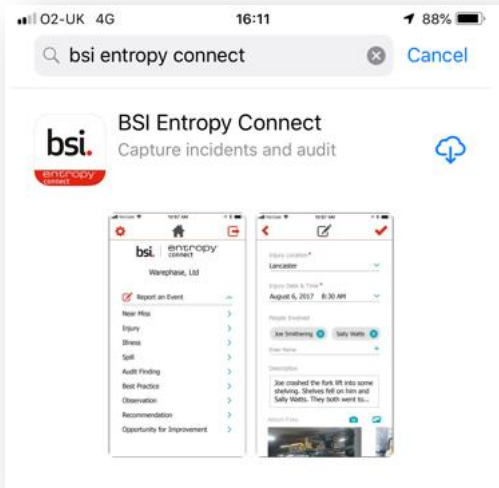
4.1 How to....Download the BSI Connect App

- 1) On your mobile phone or tablet, tap the Apple store icon on  or the Play Store 
- 2) In the search field, type BSI Entropy Connect

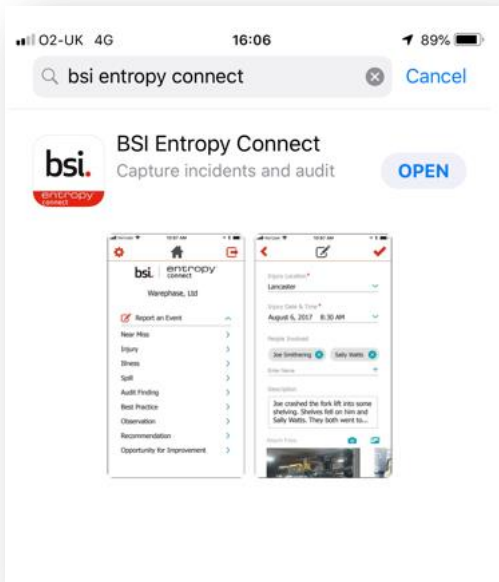
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Apple Downloads

Tap **GET** or the download icon  (you will see the download icon if the app has been previously downloaded)

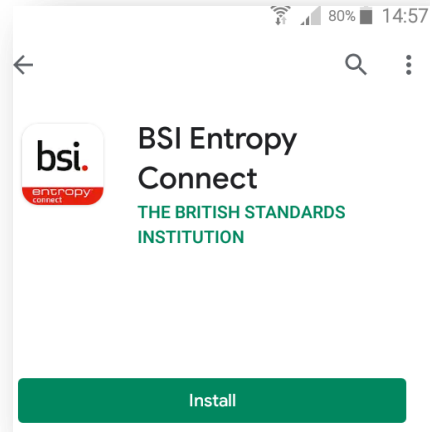


Once the download is complete, tap **OPEN**

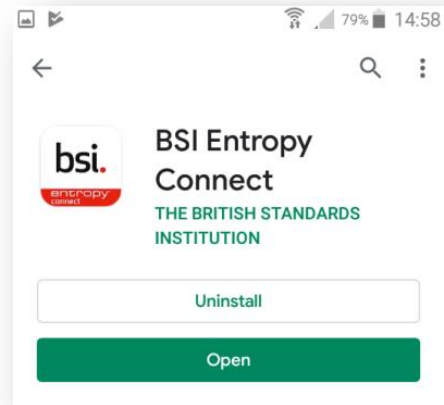


Android Downloads

Tap **INSTALL**



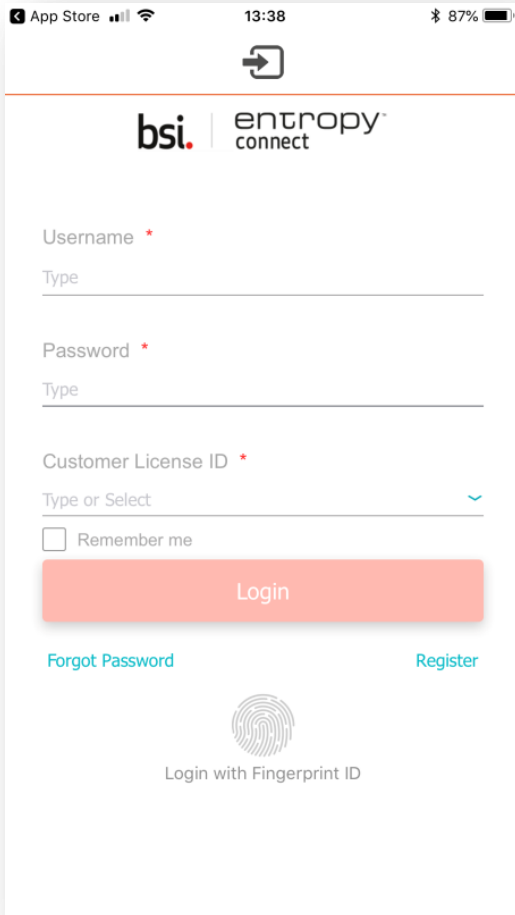
Once the download is complete, tap **OPEN**



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4.2 How to....Login/Register your mobile app account


- 1) Open up the mobile app on your device (i.e. iPhone, iPad)
- 2) You will be presented with a login screen



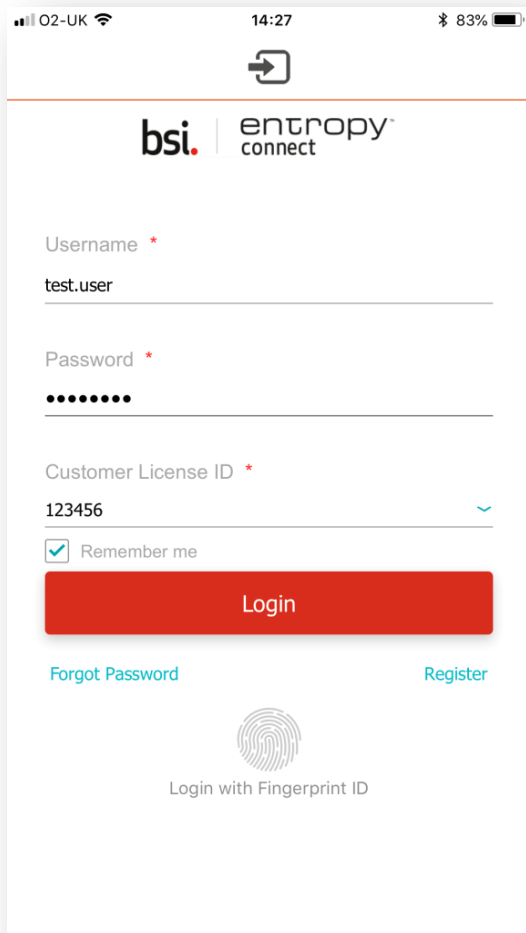
- 3) If you have an active Entropy account [click here](#) for instructions. If you have never logged into the Entropy system [click here](#) for instructions.

4.2.1 How to....Logging into the app for the first time (Existing Entropy User)

An existing Entropy user will enter the following information the first time they launch the mobile app:

- Username & Password (this is the same username & password you already use to log into the Entropy system)
 - The Customer License ID (this information can be found on your Entropy Mobile App activation email or alternatively you can log into your Entropy system, click the help icon  and select **About Entropy**)
- 1) Enter your Entropy login credentials, customer license ID, tick the **Remember me box** and select **Login**

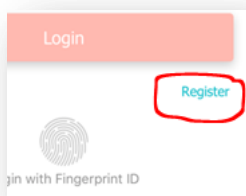
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- 2) The app will load and take you to the **Report an Event** screen
- 3) For instructions on how to create an event [click here](#)

4.2.2 How to....Logging into the app for the first time (non-Entropy User)

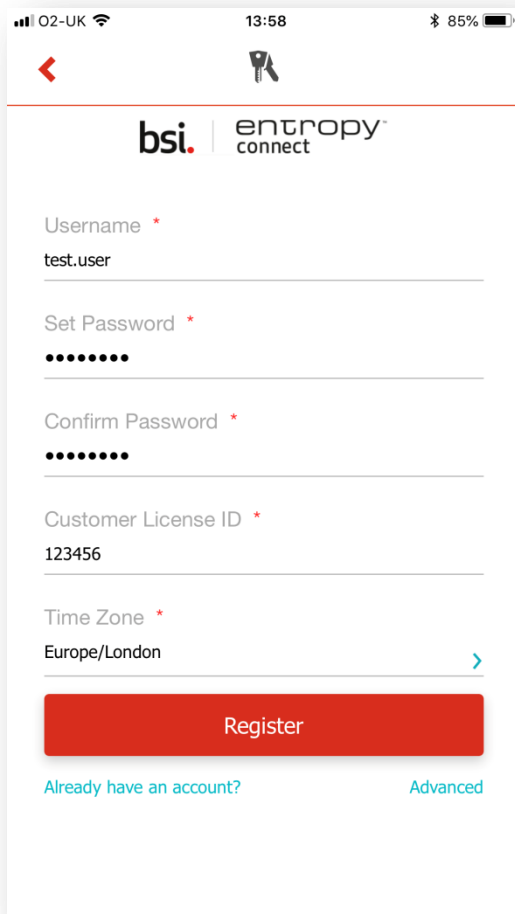
- 1) Tap **Register**



- 2) A non-Entropy user will enter the following information the first time they launch the mobile app:
 - Username (you get this from your activation email)

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- Password (enter and confirm your unique password, minimum of 8 characters and must include a minimum of one number and one letter)
 - The Customer License ID (you get this from your activation email)
 - Time Zone (use pick list i.e. UK would select Europe/London)
- 3) Select **Register**



The screenshot shows the registration screen of the BSI Entropy Connect mobile app. At the top, there is a status bar with '02-UK', '13:58', and '85%' battery. Below the status bar is a navigation bar with a red back arrow, a key icon, and the 'bsi. | entropy connect' logo. The main form contains the following fields: 'Username *' with the value 'test.user'; 'Set Password *' with a masked password of eight dots; 'Confirm Password *' with a masked password of eight dots; 'Customer License ID *' with the value '123456'; and 'Time Zone *' with a dropdown menu showing 'Europe/London' and a right-pointing arrow. At the bottom of the form is a large red button labeled 'Register'. Below the button are two links: 'Already have an account?' and 'Advanced'.


- 4) You will receive an on screen message advising that your registration was successful
- 5) If the app takes you back to the login screen, log in with the credentials you have just set up
- 6) The app will load and take you to the **Report an Event** screen
- 7) For instructions on how to create an event [click here](#)

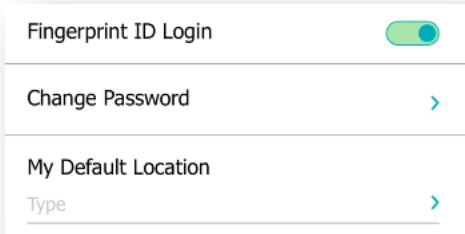
4.3 Mobile App Account Settings


4.3.1 How to....Set up Fingerprint ID

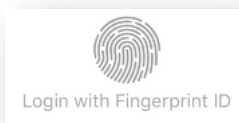
Tip: If you wish to use Fingerprint login you must first have set up Touch ID finger print on your phone or tablet. For instructions on how to do this please refer to your phone or tablet instructions.

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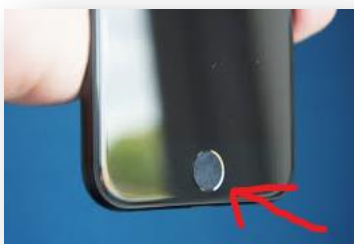
- 1) To set up Fingerprint ID, first log into the mobile app using your username and password.
- 2) Once logged in, tap the settings icon 
- 3) Fingerprint ID is disabled by default, move the slider to the right to enable



- 4) Tap the back arrow in the top left hand corner to return to the **Home** screen
- 5) To check Fingerprint ID is working logout of the app by selecting the log out icon , select **OK** to confirm logout
- 6) On the login screen, tap Login with Fingerprint ID




- 7) A message will pop up advising you to place your finger on the reader – this being your phones home button as shown below:



- 8) Place your finger on the home button until you are logged into the app
- 9) The app will load and take you to the **Report an Event** screen
- 10) For instructions on how to create an event [click here](#)


4.3.2 How to....Change your password via the mobile app

- 1) Log into the mobile app

- 2) Once logged in, tap the settings icon 
- 3) Tap **Change Password**
- 4) Enter your current password and new password (twice)
- 5) Tap **Change Password**, you will receive an on screen confirmation message confirming the change was successful

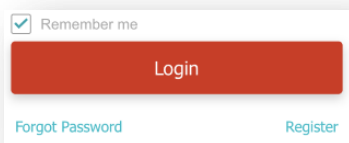
4.3.3 How to....Change your Default Location on the mobile app

Adding a default location to your mobile app account will mean that you will not need to select a location each time you create an event via the mobile app. If you create events for different locations, it's advisable to leave the default location blank forcing you to select the correct one each time.

- 1) Log into the mobile app
- 2) Once logged in, tap the settings icon 
- 3) Tap **My Default Location**
- 4) Depending on what locations your administrator has associated with your account depends on the options available. Select a location and the changes will be applied, you'll be directed back to the settings page

4.3.4 How to....Forgot Password

- 1) If you have forgotten your mobile app password, tap **Forgot Password**, located on the login screen

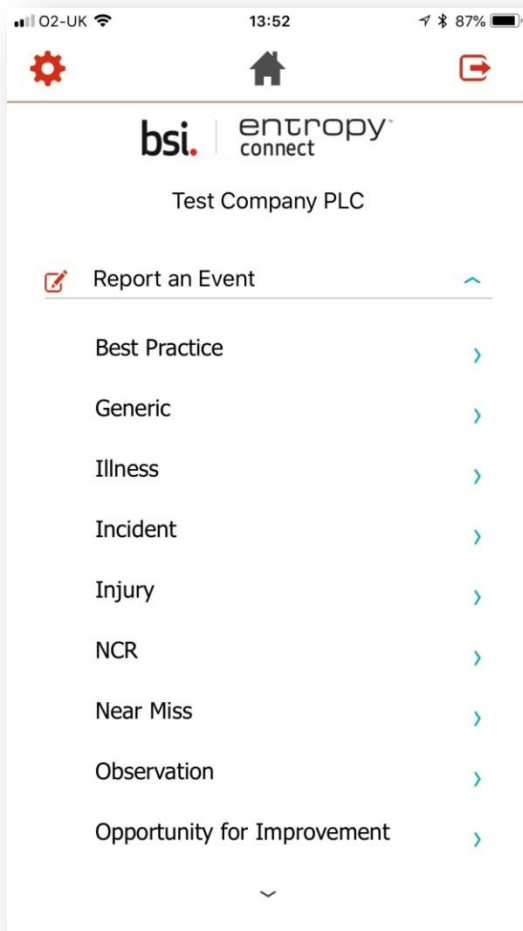


- 2) Enter your **Username** and **Customer License ID** (you can tap the expand icon to the right of this field to pick your License ID from the drop down menu)
- 3) Tap **Submit**
- 4) You will receive an onscreen prompt advising reset instructions will be emailed to you – select **OK**
- 5) You will receive an email (the email will be sent to the email address associated with your account). The email will contain instructions and a hyperlink. Click the hyperlink to change your password, (this process will log you into the Entropy web based system, if you only use the mobile app simply exit the browser and return to the app to login with your new password)

5. Creating an event via the mobile app

5.1 How to....Create and Submit an Event

- 1) First, ensure you are logged into the mobile app
- 2) From the **Home** screen, tap the type of event you wish to create (this can be changed to a different event type by the person responsible for processing the event record)



- 3) Depending on the event selected, you will be required to complete a number of basic fields
- 4) The image below shows the fields associated to an 'Incident' record:

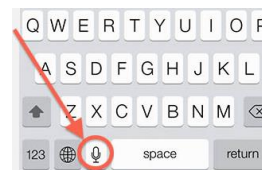
Location – If you have a default location set up against your account it will appear here, you can use the symbol to change the selection

Date and Time – Tap the field to reveal a date/time scroll wheel, scroll and tap Done to select a date/time (note: Android devices will look/behave slightly differently)

People Involved – Type (or dictate) the name(s) of the people involved, tap the symbol to add

Description – Type (or dictate) the information into the description field.

Dictation - If you want to use voice to record information, tap the dictator button on your phone (this can be used in the Description and People Involved fields)



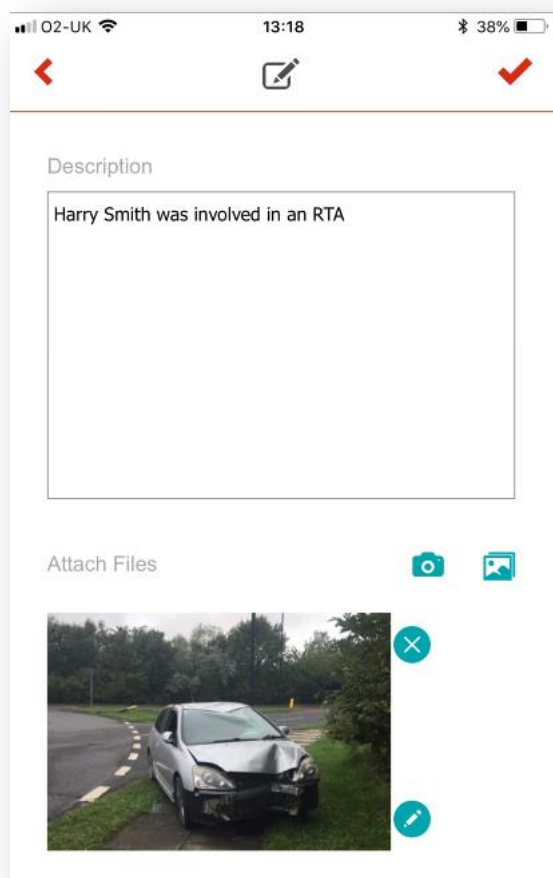
5.1.1 How to....Add photos & Videos to your event

- 1) You can add photos and videos to your event (videos are not currently not available for Android devices)
- 2) To take a photo/video, tap the camera icon (if prompted, allow the app to access your camera)
- 3) You will be taken to a preview of your photo/video where you can choose to retake the photo/video or use it
- 4) To add a photo from your photo library tap the library icon (if prompted, allow the app to access your photos)
- 5) Tap to submit your event OR go to the next section to add annotations to your photo

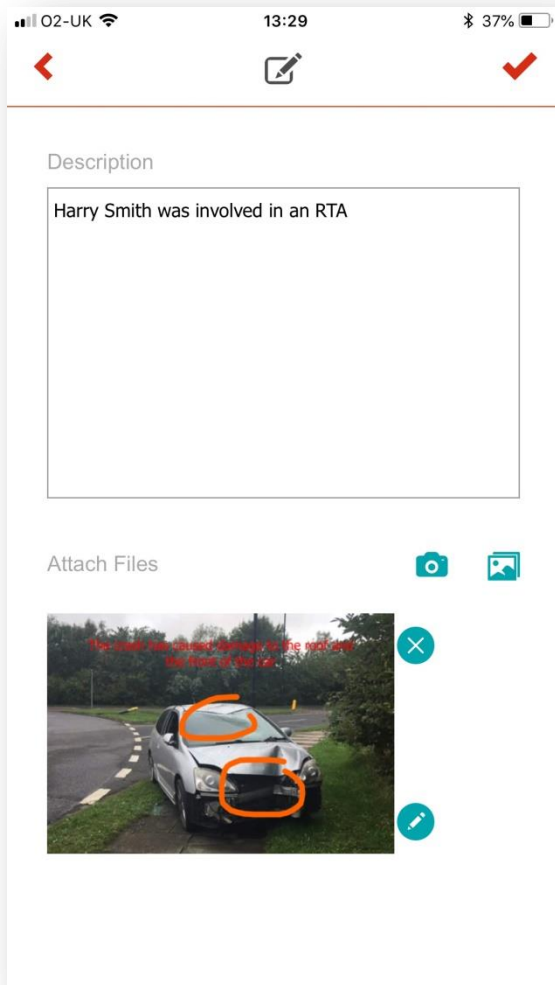
5.1.2 How to....Add annotations to your event


- 1) Once you have added a photo, tap the annotations icon

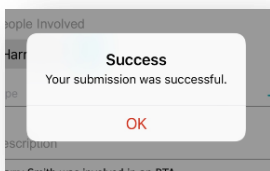
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- 2) Use the annotations tools to rotate, draw, crop, resize and add text to the image:



- 3) Tap  to submit your event
- 4) You will receive an on screen prompt advising your submission was successful



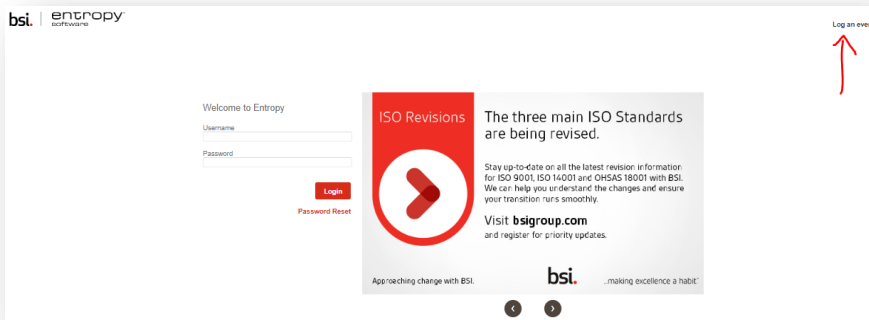
5.1.3 How to....use the mobile app offline

- 1) A user can log into the mobile app and create events while offline (not connected to the internet). However, their submission won't actually be completed until their device returns to online mode; the user will receive a message advising them that the event will be sent once the phone is back online.

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6. Logging an Event without the Mobile App

As well as logging events via the Mobile App (events being Findings, Incidents, Near Misses), events can also be logged using 'Log an Event', this hyperlink is located on the Entropy login page, but as it is a hyperlink, can be copied, renamed and placed anywhere accessible to your staff, such as your company intranet, and the really great thing is, no user licenses are required! If for whatever reason the link does not appear on the login screen, please contact the Entropy helpdesk.



- 1) To copy the link, right click the hyperlink and select copy link address or save link address. Add the address to the shortcut you have created (i.e. your intranet)
- 2) When a user clicks on 'Log an event' link, an event page will open up:


- 3) They will need to complete all fields marked with * and click submit
- 4) The event acceptor will be notified via email (assuming the acceptor and email has been set up) that a new event has been created. Follow the next section for information on how to process an event

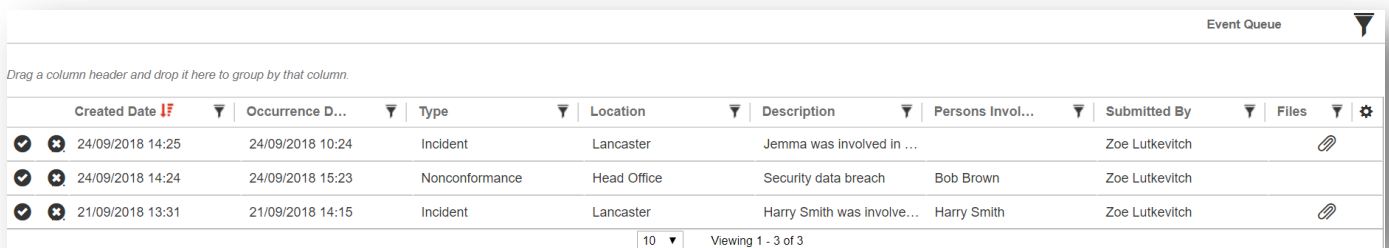
7. Processing an event



Only users with certain access profiles can process events from the event queue ([click here](#) to see these profiles). The event queue is located on the main menu bar within Entropy





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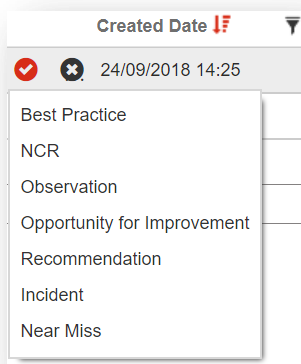
7.1 How to....Process an event from the event queue

- 1) Nominated users will receive an email notification informing them that a new event has been created ([click here](#) for instructions on how to create the email notification)
- 2) Click the event queue icon 
- 3) The event queue grid displays events waiting to be processed – full contents of all fields are viewable via hover text



Created Date	Occurrence D...	Type	Location	Description	Persons Invol...	Submitted By	Files
24/09/2018 14:25	24/09/2018 10:24	Incident	Lancaster	Jemma was involved in ...		Zoe Lutkevitch	
24/09/2018 14:24	24/09/2018 15:23	Nonconformance	Head Office	Security data breach	Bob Brown	Zoe Lutkevitch	
21/09/2018 13:31	21/09/2018 14:15	Incident	Lancaster	Harry Smith was involve...	Harry Smith	Zoe Lutkevitch	

- 4) Click the  to reject the event (please note the event cannot be recovered, the system activity log records the rejection for audit purposes)
- 5) Click  to accept and process the event
- 6) The event processor is able to view any attachments before processing the event by simply clicking on the paperclip image under the column **Files** 
- 7) When the user clicks  to accept, they will be presented with a list of record types which they can convert the event into



- 8) Select the applicable record type from the list and **OK** to confirm
- 9) The user will then be taken to the chosen record type i.e. if the event was being converted into an Incident they will be taken to a new Incident record

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- 10) Once the event has been transferred to the chosen record type, the steps for managing the record within Entropy remain the same (step by step instructions can be found in the Entropy User Guides located within the help area of 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

Tel: +44 (0)345 5049524

For USA & Americas

Email: entropysupport@bsigroup.com

Tel: +1 888 640 6776

9. Revision History

Version	Reason	Date	Author
V1.00	Initial version	Sept 2018	ZL
V1.01	5.5.17.0 update changes: - Event queue acceptor access profile & set up - Event queue acceptor email notification - Log an event from login screen	08.05.19	ZL
V1.02	Launch of mobile app for Android devices - Updated device download screen shots to include Play Store - Improved event acceptor email instructions	24.09.19	ZL