

SENSORS FOR FOOD AND LIFESCIENCE.



HYGIENIC BY DESIGN

ANDERSON-NEGELE

OPERATING MANUAL

Paperless Process Recorder

Legendary™ Manual

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1 System Overview

The Anderson-Negele PPR (Paperless Process Recorder) and Legendary™ cloud software is an innovative solution to help you streamline recording of process data, creation and management of legal records, and secure storage of those records for state and third-party audit.

The PPR and Legendary™ cloud software eliminates many problems of current paper recorders. By providing digital solution for charts and eliminating moving mechanical parts PPR ensures that your production does not get hampered due to mechanical parts failure, printing hardware or paper chart issues. It completely eliminates recurring hardware costs for print arms, motors, print cartridges, and paper charts and reduces costly equipment failures and maintenance cost.

The PPR and Legendary™ cloud software is much more than data trends being tracked in a data logger or historian solution. By providing workflows to create digital charts embedded with digital annotations and providing intuitive process to review and approve records, PPR and Legendary™ helps your plant and quality team get audit ready for internal, state, or third-party audits.

1.1 PPR Connectivity to Legendary™

An active Legendary™ subscription is required for each PPR. The PPR employee management happens through Legendary™ software allowing a single user database to quickly be synchronized across all active PPRs at a single plant.

Each Legendary™ instance can have an unlimited number of PPRs connected to it allowing a Legendary™ user to review and approve records from all PPRs in their plant using a single login.

2 Legendary™ Access

Legendary™ software can be accessed using any web enabled device by going to the specific URL provided to your company or organization. When a user enters their company's Legendary™ URL they will be taken to a login screen similar to that shown in Figure 1 below.

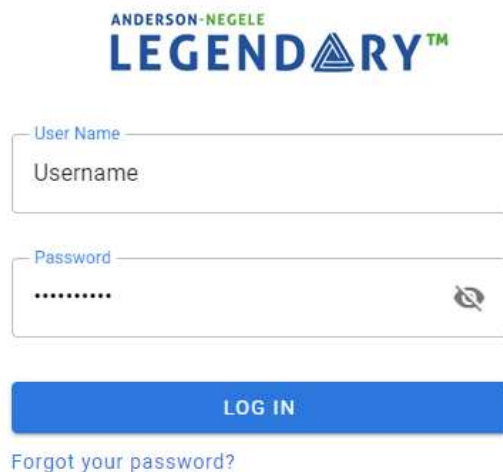


Figure 1: Legendary™ Login

Sample Legendary™ URL

<https://clients.intelx.com/Login3/Legendary-CompanyName/Application/LD>

General Browser Requirements

- To successfully interact with Legendary™, your browser must meet the following requirements:
- The browser must be configured to accept cookies.
- The browser must be configured to execute JavaScript.
- Even if you are using a supported browser, you might not be able to successfully use our online services if you have disabled cookies or JavaScript.
- The browser must be capable of 256-bit SSL encryption.
- A resolution of 1024x768 or higher in full screen mode is recommended for desktop platforms.
- Screen zoom levels other than 100% are not supported.

Supported Browsers

Legendary™ is supported on current, manufacturer-supported versions of the following desktop browsers:

- Internet Explorer
- Microsoft Edge
- Firefox
- Chrome
- Safari

Legendary™ is supported on current, manufacturer-supported versions of the following mobile browsers:

- Chrome
- Safari

Login Credentials

Every user must provide valid credentials to gain access to the Legendary™ software. Contact your Plant’s Legendary™ Plant Administrator to create an account or if you ex-

perience problems logging in. If the wrong username or password is entered 5 consecutive times, the User’s account will be locked out until it is reset by the Plant’s Legendary™ Administrator.

For compliance and to ensure operator security, your username and password should not be shared.

3 PPR and Legendary™ Access Levels

3.1 Employees

The basic access level is an employee. Employees can use PPR but are not able to login to the Legendary™ software. It is common for members of the operations team to be configured as an employee only.

3.1.1 Location Hierarchy

Each Employee must be assigned a location when they are configured. The location hierarchy defines which PPRs they will be able to use and the records they will be able to see/approve that were created by those PPRs. If Anderson-Negele is the parent company and a user is given top level access in the Hierarchy they will be able to see all equipment within that company.

In the example shown in Figure 2 below Anderson-Negele is the Parent Location, Fultonville plant is a specific plant, Pasteurizer and Pouch Filler are manufacturing areas within the plant and there are three PPRs within the Pasteurizer manufacturing area. When the Plant Administrator configures a user they could restrict access of the user to any level in this hierarchy.

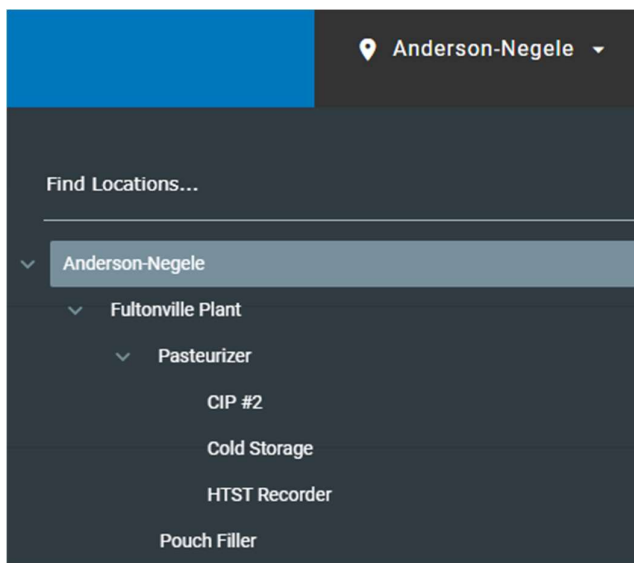


Figure 2: Example Location Hierarchy

3.1.2 Legendary™ Role

Every employee gets a Legendary™ Role, the primary function of this role is to define the employee's role in the record approval workflow. Standard Legendary™ Roles include Operator, Supervisor, Quality, Administrator, and Inspector. This Legendary™ Role is also referred to as the User Group or Responsible Group.

Operator, Supervisor, Quality roles are usually given to operations and quality team members with those job functions. Administrator role is assigned to members who are authorized to administer other users and assign workflows for PPRs. The inspector role is typically given to external inspectors from regulatory agencies or 3rd parties.

Legendary™ Administrators have the capability to customize roles to suit the needs of your operating company.

3.2 Users

When an employee is granted User access by a Legendary™ administrator, they will be able to login to Legendary™ to review and approve records based on their Legendary™ Role, location, and the configured workflow. Legendary™ allows the Administrator to configure up to 500 users. If additional users are needed for your company, please contact Anderson-Negele.

3.3 Administrator

The administrator is responsible for user management such as creating new users, inactivating former users and password/PIN management. The Administrator can also change some PPR Equipment configuration, and approval workflow configurations for any of the PPRs within their company.

Each company or plant is required to have at least one active Legendary™ Plant Administrator. However, multiple users can be configured with the Administrator role.

Users with the Administrator role are not able to participate in the record approval workflow. If someone in the Administrator role is responsible for one of the approval workflow stages a second Legendary™ user account with required non-administrator role must be created.

4 Legendary™ Navigation

4.1 Home Screen – All Legal Records

Upon successful login the user will be directed to the Legendary™ home page shown in Figure 3 below. This view is the same as the Home Screen and the user can press the *Home* icon at any point to return to this screen.

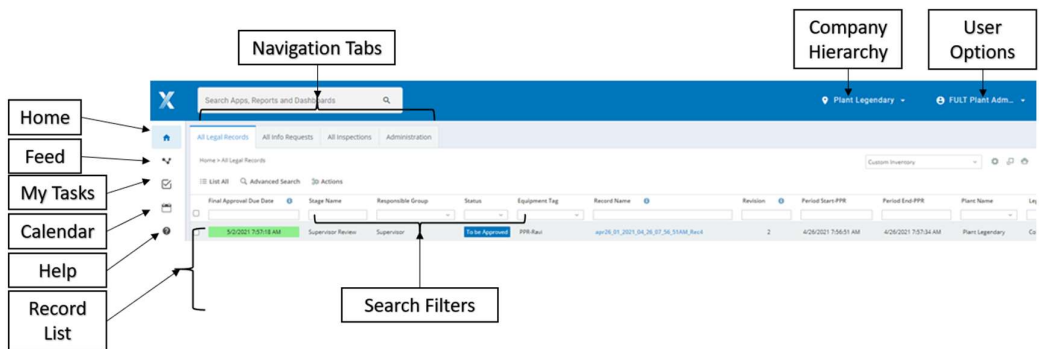


Figure 3: All Legal Records

Common Navigation buttons available from the home screen:

- Home – Returns user to this screen from any other Legendary™ menu
- Feed – Configurable by the user to get the latest release notes from Legendary™
- My Tasks – All records that are waiting for approval or response from the user group which the currently logged in user belongs to.
 - Example: If the current user is a member of the Quality User Group (Legendary™ Role), the My Tasks page will display all records that are awaiting approval by or have open tasks for the Quality role.
- Calendar – Shows all of My Tasks on monthly calendar view.
- Help – Used for general platform help.
- Record List – Displays all records that the user has access to see. This list can be filtered with the various Search Filters
- Search Filters – Text and calendar filters that allow the user to quickly find the record(s) they are looking for.
- Location – Displays the Company Hierarchy the user currently has access to see including equipment and sub-locations the user has access to. See Section 3.1.1 for additional information.
- User Options – Access buttons to *User Profile* or *Log Out*.
- Navigation Tabs – Access other common screens within Legendary™.

5 Common Interactions

Legendary™ allows access to all current and historical records of the organization. The User’s configured location will restrict which records (from which PPRs) the logged in user is authorized to see. See Section 3.1.1 for additional information.

5.1 Sorting and Filtering Records

On Legendary™ screens a user can apply multiple text and date filters to quickly find the relevant record or information they are seeking.

Sorting

When on Record List screen e.g. the Home Screen, all Records can be sorted in ascending or descending order by clicking on the header of the field you would like to apply the sort filter to. To choose the type of sort that occurs hover over the Column Title or click next to the Column Title e.g. *Record Name*, to see the sorting options available, shown in Figure 4 below. When the Sorting methods are shown, select the sorting method you wish to apply e.g. select *Ascending*, *Descending* or *None*.

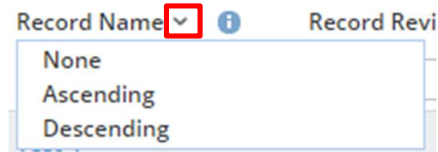


Figure 4: Sorting Records

Filtering

The All Records Table has several smart filters available which allow the user to apply any combination of the various filter types to easily search for a record based the Various Column Titles.

Filter Types

- Text filter – Free text field that allows a user to type any text before applying the filter
 - a. Example – Record Name
- Drop down filter – Predefined selection of all possible options
 - a. Example: Equipment Tag Filter
- Date filter – A Selectable Calendar View
 - a. Example – Period Start

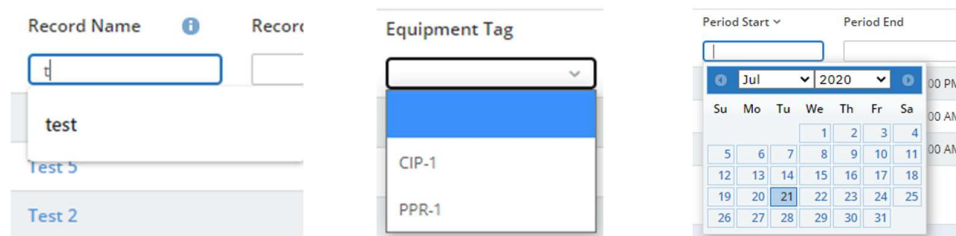


Figure 5: Examples of Filter Types

To limit the number of results, multiple filters can be applied across multiple columns. For example, filtering first by Equipment Tag and then by Date Created will allow a user to quickly find a record from a specific date during an audit.

6 Legal Record

The Legal Record detail view of each record provides log and traceability of all activities done in Legendary™ on the record since its creation. The detail view can be accessed by clicking on a *Record Name* in *My Legal Records* or *All Legal Records*. The Legal Record has many detailed sections that can be collapsed or expanded.

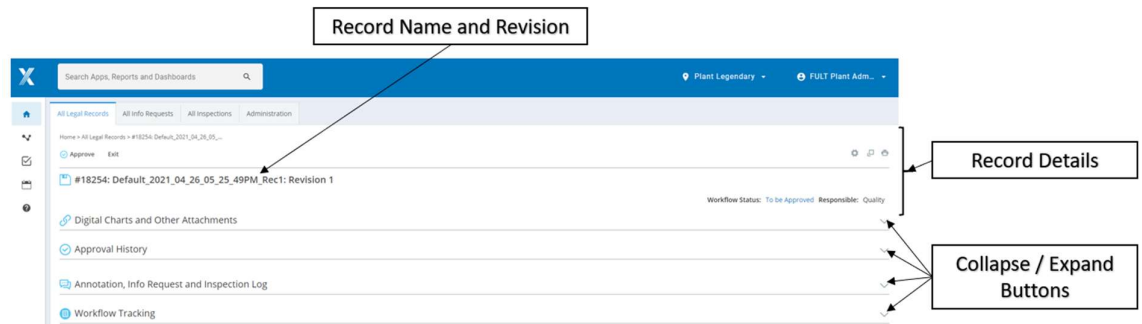


Figure 6: Detailed Legal Record View (Collapsed)

6.1 Record Details

Information within this section of the Record:

- Workflow Status – Shows the current approval status of the record.
 - To be Approved – This record is ready to be approved by the Responsible Group
 - Pending Chart – Legendary™ is waiting for updated chart to be created and sent from the corresponding PPR. This status applies when an annotation or approval is added from Legendary™ or when there are open information requests corresponding to this record.
 - Ready for Audit – The approval has been completed. See Approval history of the Digital Chart for additional information.
- Revision Number – Shown at the end of the Record Name
- Responsible – Shows the User Group or Legendary™ role which is responsible for approving the current workflow stage.
- Approve – Allows the User to add an approval to the Record See Section **Error! Reference source not found.** for additional information.
- Exit – Returns user to previous screen.

6.2 Digital Record Review in Legendary™

All Records will synchronize from PPR to Legendary™ following the Record Period. This Record image can be viewed by the user in the Digital Charts and Other attachments section of the Record view.

Record Revision:

When a Record is first uploaded by PPR to Legendary™ the revision is typically number 1. If there are any annotations or approvals added to chart after it was created, the revision number will increment with each additional change to the chart. For additional information on Record Revision See the PPR Manual.

Viewing a Record Image

The latest and all previous revisions of the Record can be accessed by going to *Attachments* section and clicking on *Charts* tab as seen in Figure 7 below.

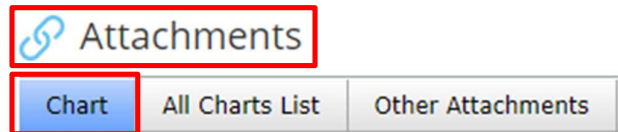


Figure 7: Latest Record

When viewing a Record image, the revision number appears on the bottom left of the image (shown as Chart Revision 2 in Figure 8 below). The pagination toolbar below the Record image can be used to scroll to older revisions of the same record. Page 1 of this pagination below the record image shows the latest revision chart, the higher page numbers will display older chart revision images.

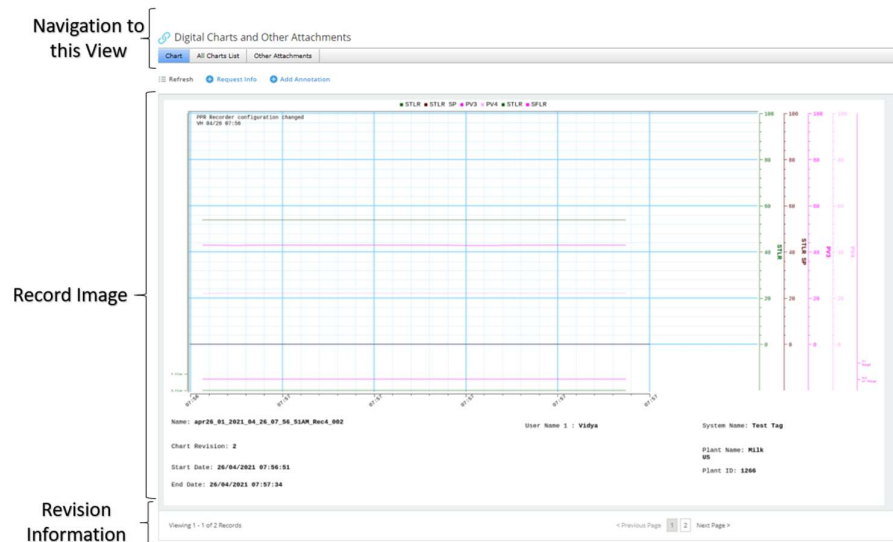


Figure 8: Record Revision Navigation

Information on a record

For additional information about the information that appears on a record image including trendlines, approvals and annotations see PPR Operating Manual Section 2.1.3: PPR Record Layout. If the review of a record shows that additional information needs to be added to the record the user can do so directly from Legendary™ with the following workflows.

6.2.1 Downloading and Printing Record Images

All revisions of the Record can be viewed, downloaded, and printed as required by clicking on *All Charts List* tab as seen in Figure 9 below. Note: Approval or annotations cannot be added to downloaded images outside the Legendary™ software.

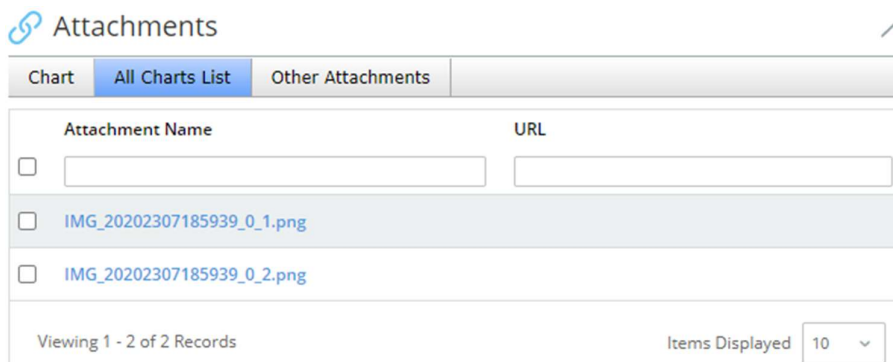


Figure 9: All chart revisions

Selecting one of the Record Revisions from the All Charts List will automatically download the record image as a .png image as seen Figure 10. The Image can then be physically printed on paper if required using standard PC software.

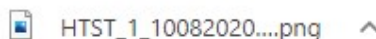


Figure 10: Downloaded PNG

6.2.2 Request Additional Information

When the review of a record image in Legendary™ indicates that something is missing from the image the user who is conducting the review can request additional information related to a record from other Employees. These information requests appear on the PPR Home Screen as Tasks, see PPR Operating Manual Section 4.4.5: Reviewing and Closing Tasks for additional information.

Complete the information request workflow by following these steps:

1. Go to *Digital Charts and Other Attachments* section
2. Click on the *Request Info* button, as seen in Figure 11 below.

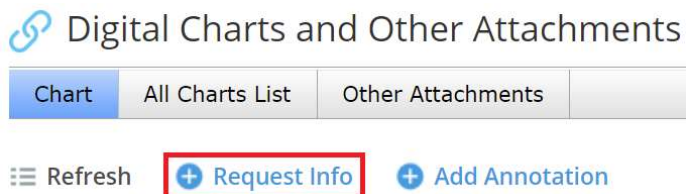


Figure 11: Navigate to Information Request

The User will then see a popup information screen similar to that shown in Figure 12 below.

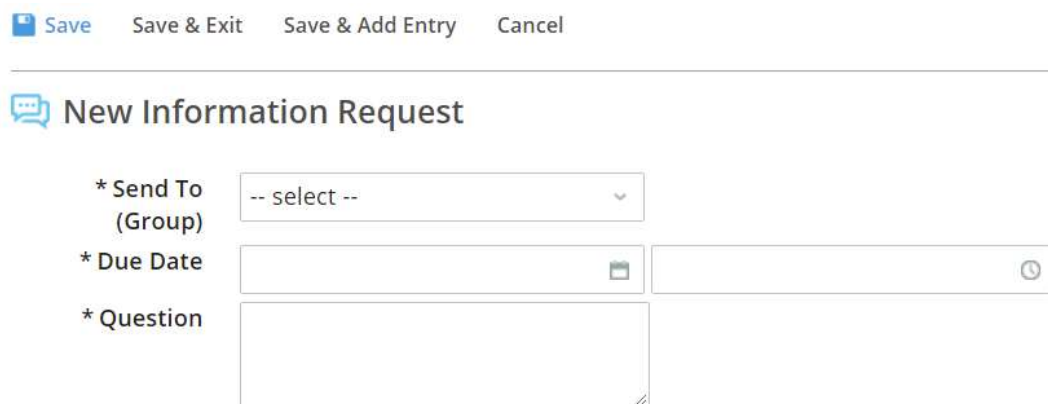


Figure 12: Request Additional Information

3. Choose the Responsible group who may be able to respond to your information request by selecting the *Send to Group*.
 - a. All Legendary™ users in that user group will see the information request in their My Tasks tab. The notification will also be sent to the PPR which generated this legal record in the form of a Task.
4. Select a *Responsible Employee* to direct your inquiry to a specific Employee. (Optional Step).
5. Enter your question in the *Question* field, here are some common examples of questions that are asked in the Information Request workflow.
 - a. Example 1: Can you please add product information to the record between 4am and 6pm?
 - b. Example 2: Add annotation of event at 11:44am
 - c. Example 3: is the temperature spike seen at 2:22pm the result of a CIP, please annotate accordingly.
6. Add the due date in the *Due Date* field, (Optional Step)
 - a. Please Note that the record cannot be approved until all open information requests are closed by employees.
7. Click on *Send* or *Save & Exit* to send the message request
8. Click on *Save & Add Entry* to send the message request and start new information request (Optional Step)

- Click on *Cancel* to disregard the request and go back to previous screen. (Optional Step)

Information Request Status

Once an information request has been opened on a Legendary™ Record, the status of information requests can be tracked as shown in Figure 13 below.

- Go to *Updates* section
- Click on *Information Requests* tab.

Status	Question	Sent By	Sent To (Group)	Sent To (Employee)	Sent On	Chart Rev. at Start	Due Date	Response	Responded By	Responded On	Chart Rev. at End
<input type="checkbox"/>	Information request to PPR operator.	FULT Plant PCQI	Operator		4/26/2021 2:24:38 PM	1	4/27/2021 12:00:00 AM				
<input type="checkbox"/>	Information request to Supervisor.	FULT Plant PCQI	Supervisor		4/26/2021 2:25:05 PM	1	4/27/2021 12:00:00 AM				

Viewing 1 - 2 of 2 Records Items Displayed 20

Figure 13: Information Request Status

Within the Information Request Status:

- Status – The current status of the information request.
 - Pending Response – Indicates that the status is still open no users have yet responded to the information request.
- Question – shows the text of the question that was sent.
- Sent By – The user who sent the information request.
- Sent to Group – The user group to whom the question was sent to.
- Sent On – The date when the information request was sent.
- Chart Rev. at Start - The revision number of the Record when the information request was created.
- Due Date – The date when the response to information request is due by.
- Response – Shows the reply text sent by the user who responded to the information request.
- Responded By – The user who responded to the information request.
- Responded On – The date when the response was sent by the Legendary™ or PPR user.
- Chart Rev. at End – The revision number of the Record when the response to information request was sent.

6.2.3 Add Annotation from Legendary

A user can add Annotations from Legendary™ while reviewing a record by following these steps:

- Go to *Digital Charts and Other Attachments* section
- Click on the *Add Annotation* button, as seen in 14 below.

Digital Charts and Other Attachments

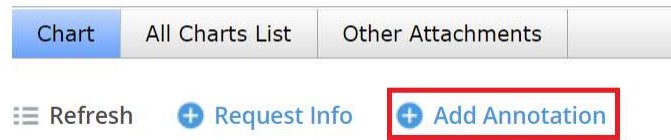


Figure 14: Navigate to Add Annotations

The User will then see a popup information screen similar to that shown in Figure 15 below

3. Enter the Timestamp of the Annotation in the *Annotation Date* field. This is the Time on the record the annotation is referring to.
 - a. Note: that *Annotation Date* must be within the Record Period of the chart that is being viewed.
4. Enter the annotation text in the *Annotation Text* field.

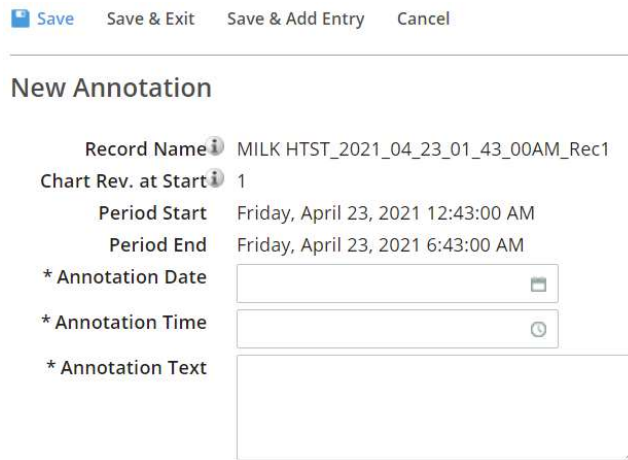


Figure 15: Add new annotation

Add Annotation Status

Once an Annotation has been created in Legendary™ the corresponding PPR must connect to Legendary™ through the API call, add the annotation details to the record and increment the revision. The status of new Annotations added can be tracked as shown in Figure 16 below.

Annotation, Info Request and Inspection Log

Information Requests Annotations Inspector Reviews

List All



<input type="checkbox"/>	Added to Chart?	Annotation Text	Annotation Timestamp	Annotated By	Annotation Added Date	Chart Rev. at Start	Chart Rev. at End
<input type="checkbox"/>		Another annotation added from Legendary		FULT Plant PCQI	4/26/2021 2:39:31 PM	1	
<input type="checkbox"/>		Annotation added from Legendary		FULT Plant PCQI	4/26/2021 2:39:03 PM	1	

Viewing 1 - 2 of 2 Records

Items Displayed 20

Figure 16 Annotation status

Within the Annotation Status:

- Chart Rev. at Start – The revision number of the Record when the new Annotation was added in Legendary.
- Chart Rev. at End – The revision number of the Record after the new Annotation was added in PPR.
- Added to Chart? – Shows the PPR status of adding the new annotation to the record
 -  - Indicates that Legendary™ has not received a new revision of the Record from PPR containing the additional annotation.
 -  - Indicates that Legendary™ has received a new revision of the Record from PPR containing the additional annotation.

6.3 Add Other Attachments

Additional documents can be attached to a Record Detail when needed to support the information or events in the record. It is common for a company’s quality team to utilize this workflow when a Corrective Action Preventative Action (CAPA) is performed for a particular record period.

Note: The Charts section is only populated by the PPR that created that unique Record ID, a user cannot manually upload “Charts” to a Record Detail View.

To add an “Other Attachment” to a record follow this process:

1. Go to *Digital Charts and Other Attachments* section
2. Click on *Other Attachments* tab
3. Click on *Add Entry* button as seen in Figure 17 below



Figure 17: Navigate to Other Attachments

The User will then see a popup information screen similar to that shown in Figure 18 below.

4. Click on *Upload file...* Button.
5. Browse to the file that needs to be uploaded.
6. Add a short description of the file in the *Text* field and

7. Click on *Save* to attach the uploaded file to the record.
 - a. Click on *Cancel* to disregard the attachment and return to the Record View.

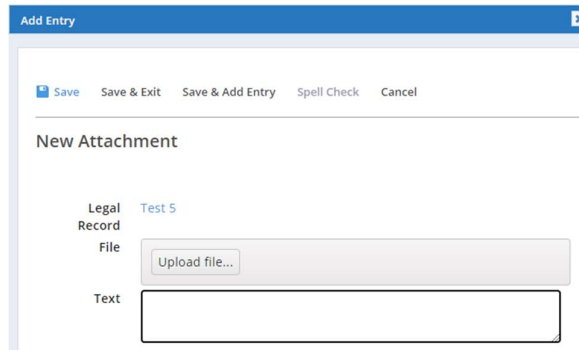


Figure 18: Add Other Attachments

Add Other Attachment List

Once an Attachment has been added in Legendary™ all users can view the entire list of all Other Attachments that have been added, as shown in Figure 19 below.

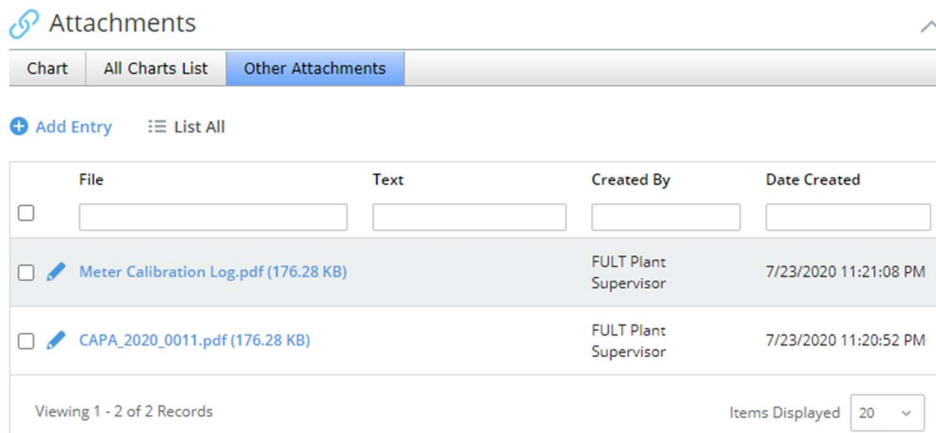


Figure 19: List of Uploaded “Other Attachments”

List of Other Attachments:

- File – The filename of uploaded document.
- Text – The description that was added when the attachment was uploaded
- Created By – The name of the Legendary™ user who uploaded the document.
- Date Created – The Date and Time when the document was uploaded.

6.4 Record Approval

When a Record is in the Workflow Status: “To Be Approved” a user who has the Legendary™ Role associated with the Responsible Group, or a Role higher than the current Responsible Group is allowed to add an approval from Legendary™. Before approving a record, the User must first review the Record Image. See Section 6.2 of this manual for additional information.

To approve a record, follow these steps:

1. Click on *Approve* button at the top left of the legal record detail view section. As seen in Figure 20 below.
 - a. The Credentials of the User who is logged in to Legendary™ are automatically used in this workflow.
2. The Workflow status will automatically change to *Waiting for Updated Chart* until the PPR creates a new revision of the record with the additional approval.

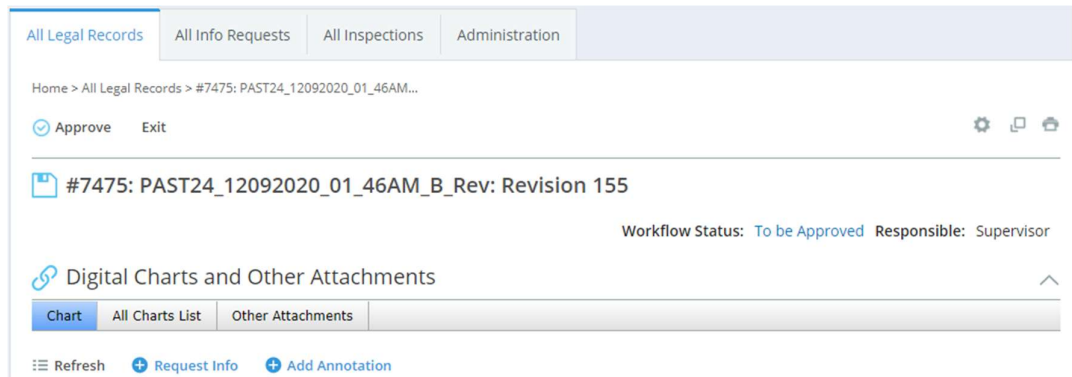


Figure 20: Record Approval

Potential Errors in Approvals Process:

The approval workflow is configured by the Plant Administrator for each PPR, possible errors in the record approval process include:

- Current user is not part of the Record Approval Workflow

CIP Record: #245: Revision 1



Figure 21: Error - Record Approval Workflow

- Pending Information
 - Legendary™ hasn’t received the updated Record following the Add Annotation Workflow
 - There are open Information Requests that are still waiting for responses from employees

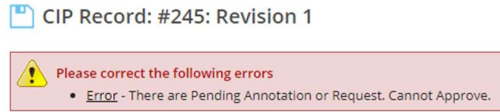


Figure 22: Pending Annotations or Info Request

6.5 Review Approval History

All approvals completed in Legendary™ can be viewed by going to *Approval History* section of a record as seen in Figure 23 below. Note that approvals that happened on PPR are not viewable in this table, that information is only displayed on the Record Image.

Approval History

List All

Approved By	Approved On	Approved Stage	Approver Role	Approved Revision
<input type="checkbox"/> BGLR-Quality	11/26/2020 8:03:37 AM	Quality Review	Quality	6
<input type="checkbox"/> Prabhu	11/26/2020 8:02:46 AM	Operator Review	Operator	6
<input type="checkbox"/> BGLR-Quality	11/26/2020 7:57:49 AM	Quality Review	Quality	3
<input type="checkbox"/> BGLR-Quality	11/26/2020 7:54:13 AM	Supervisor Review	Quality	2
<input type="checkbox"/> Prabhu	11/26/2020 7:53:01 AM	Operator Review	Operator	2

Figure 23: Approval History Table

Approval History Information:

- Approved By – The Username of the Employee who approved the record in Legendary™
- Approved On – The Time and Date the approval was submitted
- Approved Stage – The Workflow stage that was approved
- Approver Role – The Legendary™ Role of the User who approved the record
- Approved Revision – The Latest revision of this record that had been synced with Legendary™ at the time the approval was submitted.

6.6 Workflow Tracking

The Workflow History of a record includes all workflow events from when the record is first created by PPR through the final Approval of a record in Legendary. Figure 24 below shows a sample of the Workflow Tracking Table in Legendary.

Workflow Tracking

List All

Stage	Date Submitted	Action	Message	Submitted By
Pending Chart	4/13/2021 1:20:40 PM	Action executed	Close	API 2108721
Open	4/13/2021 1:10:53 PM	Action executed	Approve	Ryan Fitzgerald
Open	4/13/2021 7:00:30 AM	Workflow Started		API 2108721

Figure 24: Workflow Tracking

7 Legendary™ Configuration – Administrator Only

7.1 Adding / Editing Employees

For information on employees see Section 3.1 of this Manual. To add a new employee, follow these steps.

1. Go to the Employee Inventory Page (Shown in Figure 25)
 - a. Click on Home icon
 - b. Select Administration tab
 - c. Click on Contacts on the left menu bar

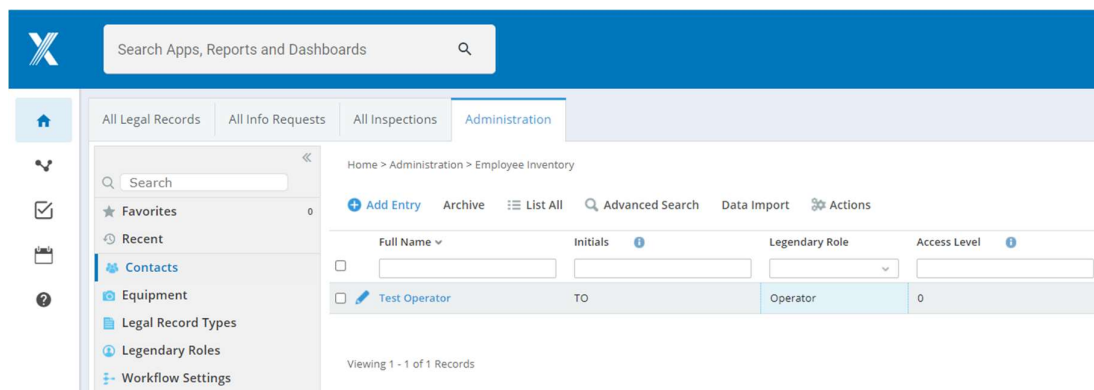


Figure 25: Employee Inventory

2. Click the blue *Add Entry* button to add a new contact/employee
3. Fill in the employee’s Details (* fields are required to save)
 - a. First Name: Employee’s First Name
 - b. Middle Name: Employee’s Middle Name
 - c. Last Name: Employee’s Last Name
 - d. Initials – Employees Initials, these initials will appear on any annotation the employee adds to a PPR Record.
 - i. Note: If left blank the employees First and Last Name will appear on annotations they create.
 - e. Legendary™ Role – Role the user is given in the customer defined record approval workflow specific to each recorder

- i. Admin (Cannot Approve) – For Plant level Administrators.
 - ii. If the Plant Administrator also requires a role in the approval workflow a second employee/User profile must be set up. See Example in Figure 27
- f. Access Level – Defines if employee will be permitted to configure or calibrate PPR(s)
 - i. Set to 1 if user is permitted to change PPR configuration or calibration
 - ii. Set to 0 if user is not permitted to change PPR configuration or calibration
- g. Active Employee – Defines if employee shows up on the list of users on PPR(s) within their location
 - i. Yes – Employee will show up as a user, can add annotations through PPR
 - ii. No – Employee will not show up as a user on PPR, though they can still access Legendary™ and participate in the approval workflow if User Access is granted.
- h. Number – Unique Employee Number, can use a company generated employee number.
 - i. Default naming convention is Plant Name, followed by a unique number for each new user that is added
- i. Location – The level of the Location Hierarchy that the employee will have access to. The employee can only review records at this location and below.
- j. Full Name – Employee’s Full Name, will automatically populate from the previously configured name fields.
- k. PPR PIN Code: Read only field showing employees current PIN
 - i. Default is 1234
 - ii. Will update to hash encrypted alphanumeric string when employee changes their PIN at a PPR
- l. Email address – Employee’s company email address.
 - i. An email address is required if this employee will later be given Legendary™ User access
- m. Phone – Employee’s Phone Number
- n. Temporary Pin Code – The temporary PIN code will be set by the Administrator when the employee’s PPR PIN has been forgotten or compromised. Default is 1234
- o. Reset Pin Code – Yes/No condition that will activate or inactivate the Temporary Pin Code defined above
 - i. Yes - Temporary Pin Code is active and can be used by the employee. When the Employee changes their PIN through a PPR the Reset Pin Code field will automatically change back to No

- ii. No – Temporary Pin Code is not active; employee will use their configured PIN to authenticate actions in PPR.

4. When all fields are updated Press Save

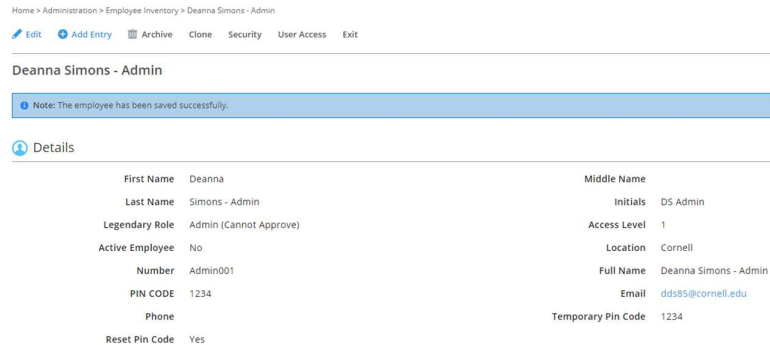


Figure 26: Example of Plant Admin Employee Profile

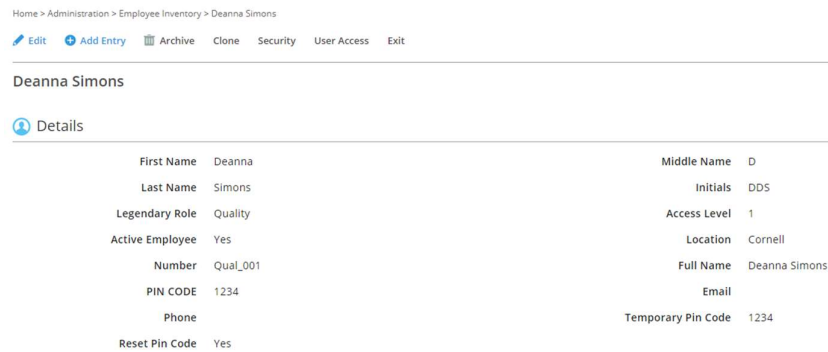


Figure 27: Example of Employee Profile (Non-Plant Admin)

7.2 Granting Legendary™ Access to Users

An employee is anyone who can access PPR, granting an employee User access will allow the employee to use Legendary™ Cloud Software. To grant Legendary™ access to an existing employee follow these steps.

1. Go to Employee Inventory (Shown in Figure 28)
 - a. Click on Home icon
 - b. Select the *Administration* tab
 - c. Click on *Contacts* on the left menu bar
2. Select an employee name for the Employee Inventory list

Full Name	Initials	Legendary Role	Access Level	Active Employee	Location	PPR Pin Code
Alex Araujo	AA1	Supervisor	1	Yes	PPR Sales Demo	xxxx
Erik Naumann	EN1	Supervisor	1	Yes	PPR Sales Demo	xxxx
Jeff Snow	JS1	Admin (Cannot Approve)	1	Yes	PPR Sales Demo	xxxx
Joe Gambrath	JG1	Supervisor	1	Yes	PPR Sales Demo	xxxx
Joe Operator	JO1	Operator	0	Yes	PPR Sales Demo	xxxx
Joe Quality	JO2	Quality	0	Yes	PPR Sales Demo	xxxx

Figure 28: List of Employees (Contacts)

3. Click the *User Access* button in employee detail view (See Figure 29)

Home > Administration > Employee Inventory > Ryan Fitzgerald > User Access > Ryan Fitzgerald

[Edit](#)
[Add Entry](#)
[Archive](#)
[Clone](#)
[Security](#)
[User Access](#)
[VS Employee Page](#)
[Exit](#)

Ryan Fitzgerald

[Details](#)

Location	Anderson-Negele	Middle Name	
Full Name	Ryan Fitzgerald	Suffix	
Number	Test001	Email	r.fitzgerald@anderson-negele.com
Prefix		PPR Pin Code	1234
First Name	Ryan	Access Level	1
Last Name	Fitzgerald	Active Employee	Yes
Display Name	Ryan Fitzgerald	Temporary Pin Code	1234
Phone			
Legendary Role	Quality		
Reset Pin Code	Yes		
Initials	RF		

[Advanced Options](#)
[Address Information](#)
[Personal Information](#)

Figure 29: Select Employee to Get User Access

4. Select the *Allow Access* checkbox (See Figure 30)

Home > System Administration > Users > User Access

[Save](#)
[Save & Exit](#)
[Save & Send Email](#)
[Cancel](#)

User Access

[Fields](#)

Employee **Carlos Vera**

Allow access

Figure 30: Allow Access Check Box

5. Fill in the User Access Settings (See Figure 31)
 - a. Login Location – The level of the Location Hierarchy that the Legendary™ User will be logged into when they sign into Legendary™. The User can only review records at this location level and below.
 - i. By default, the Login Location should match the “Location” Field within the Employee Profile

- b. User Name – The name the User will use to log into Legendary™
 - i. Default User Name is the Employee’s email address
 - ii. Standard User Name for Site Legendary™ Administrators is “First Last”
 - c. Password – Users password to log into Legendary™
 - i. Default – Leave this field blank. When *Save & Send Email* button is pressed Legendary™ (Intalex) will automatically send an email to the employee’s email account. This email will contain links which allow the User to set their own Legendary™ password and access the company’s Legendary™ URL
 - d. Force a Password Change Checkbox – When checked the user will be forced to reset their password upon the next login to Legendary™
 - i. By default, this field is left unchecked
 - e. Time zone – Set to “Determine Automatically” for all users
 - f. Culture – Set to “Determine Automatically” for all users
 - g. Default Toolbar – Set to “None” no default toolbars are used in Legendary™ at this time.
 - h. Enable the EHSQ Alliance – EHSQ Alliance is a Standard feature for all Legendary™ Users
 - i. Check the box to enable EHSQ Alliance for each User
 - i. UI Theme – Set to “Default”. This will happen automatically and be locked from editing after checking the “Enable the EHSQ Alliance” Checkbox
6. Select the User Security Settings (See Figure 31 below)
 - a. License Type – Set to “Full Access” for all users
 - b. Access Group in 5.1 Apps – Set to “Full Access” for all users
 7. Click Save & Send Email
 - a. This feature will automatically send an email to the employee’s email account. This email will contain a link allowing the User to set their own Legendary™ password.

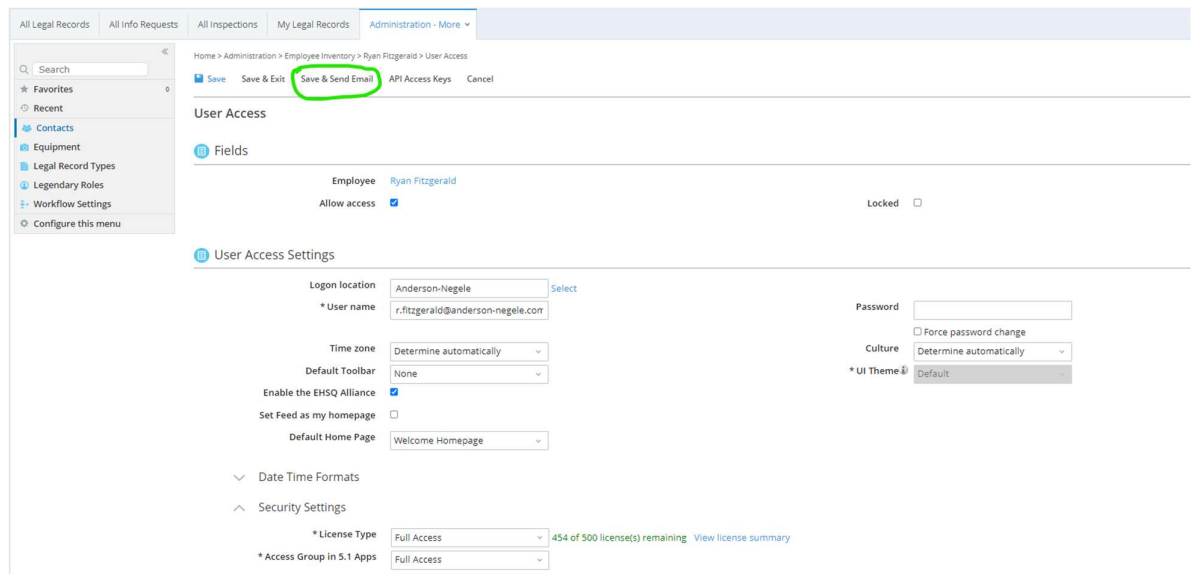


Figure 31: User Configuration

7.2.1 Locking / Unlocking a Legendary™ User Account

Locked Accounts

Locking a Legendary™ User’s account is the only way to ensure that access to the software is restricted. It should be common practice for the Clients Legendary™ Administrator to routinely audit the User Accounts and Lock as required.

If the wrong username or password is entered 5 consecutive times at the Legendary™ Login screen, the User’s account will be automatically be locked, and must be unlocked by Plant’s Legendary™ Administrator for the user to regain access to the system.

Inspector Access

When desired the Plant’s Legendary™ Administrator can create a User account for Inspectors and 3rd party auditors. The Lock feature in the User’s profile can be used in-between inspections or audits to ensure access to Legendary™ and the Records contained within are restricted.

To Lock or Unlock a User’s Account follow these steps.

1. Go to the Employee’s User Profile (See Figure 32)
 - a. Click on Home icon
 - b. Select the *Administration* tab
 - c. Click on *Contacts* on the left menu bar
 - d. Select the employee name for the Employee Inventory list
 - e. Click the *User Access* button in employee detail view (See Figure 29)
2. Select or Deselect the *Locked* button (See Figure 32)
 - a. Selected – User account is locked; they will not be able to access Legendary™

- b. Deselected – User account is unlocked; they will be able to access Leg-
endary™ with User Name and Password

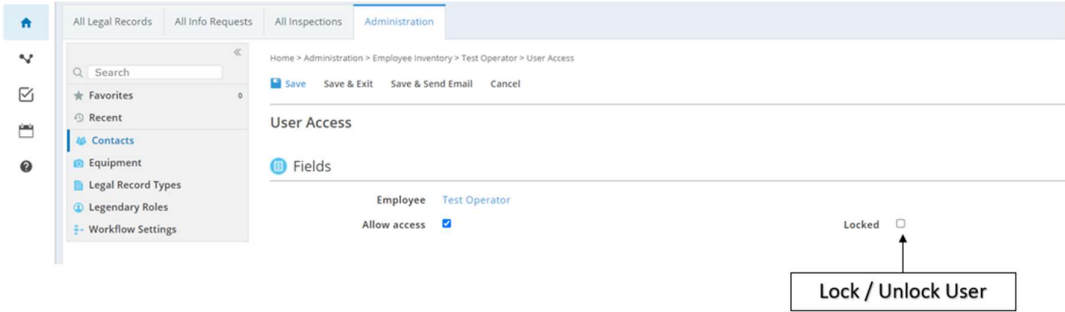


Figure 32: Locking & Unlocking a User Profile

7.3 Assigning Approval Workflow Type to PPR

Each PPR must be assigned an approval workflow. To edit the approval due date, follow these steps.

1. Click on *Home* icon
2. Click on *Administration* Tab
3. Click on *Equipment*
4. Click the pencil icon next to the Equipment that needs to be edited
5. Select the *Workflow Type* from the dropdown list
6. Click *Save & Exit*

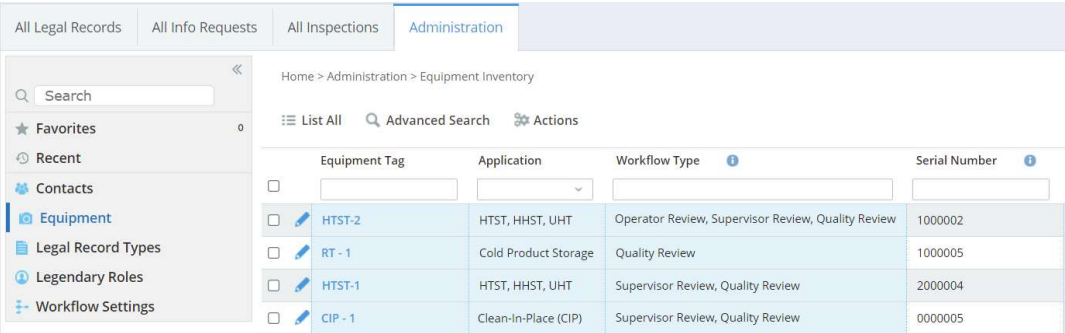



Figure 33: List of Equipment (PPRs)

Home > Administration > Equipment Inventory > Equipment: 2000004

 Save Save & Exit Cancel

Equipment: 2000004

Details

* Location	<input type="text" value="Plant Legendary"/>	Select Clear
* Equipment Tag	<input type="text" value="HTST-1"/>	
Serial Number 	2000004	
* Application	<input type="text" value="HTST, HHST, UHT"/>	▼
* Workflow Type 	<input type="text" value="Supervisor Review, Quality Revi"/>	▼

Figure 345: Changing PPR Approval Workflow Type

7.4 Adding Approval Workflow Type

Each PPR must be assigned an approval workflow. If available options in the workflow type do not meet the required approval workflow a new approval workflow can be created.

1. Click on *Home* icon
2. Click on *Administration* Tab
3. Click on *Workflow Settings*
A list of available Approval Workflows will be displayed
4. Click on *Add Entry*
5. Enter a name for the Workflow in the *Name* field
6. Enter the value for Order
It determines the position of the workflow in the dropdown list
7. Click on *Save* button
In the *Stages* section *Add Entry* button will be visible
8. Click on *Add Entry* button in the *Stages* section
9. Enter the name for the stage in *Stage Name* field
10. Select the Legendary Role responsible for approving the stage in *Legendary Role* dropdown list
11. Enter the stage number in *Order* field
12. Enter the approval due date for this stage from the creation of the record in the *Stage Due Date* field
13. Click *Save & Exit*
14. Follow steps 8 through 13 to add addition stages

All Legal Records | All Info Requests | All Inspections | Administration

Home > Administration > Workflow Type Inventory Custom Inventory

[Add Entry](#) | [List All](#) | [Advanced Search](#) | [Actions](#)

Name	Stages	Order
<input type="checkbox"/> review		
<input type="checkbox"/> Quality Review	• Quality Review	1
<input type="checkbox"/> Supervisor Review, Quality Review	• Quality Review • Supervisor Review	2
<input type="checkbox"/> Operator Review, Supervisor Review, Quality Review	• Operator Review • Quality Review • Supervisor Review	3
<input type="checkbox"/> Supervisor Review	• Supervisor Review	4

Figure 356: List of Approval Workflows

Home > Administration > Workflow Type Inventory > New Workflow Type

[Save](#) | [Save & Exit](#) | [Save & Add Entry](#) | [Cancel](#)

[New Workflow Type](#)

[Details](#)

*** Name**

Order

[Stages](#)

Order	Stage Name	Legendary Role	Stage Due Date [days to approve]
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Figure 367: Adding a New Approval Workflow

Save Save & Exit Save & Add Entry Cancel

New Workflow Stage

Details

Workflow Type: My Workflow
 * Stage Name: * Order:
 * Legendary Role: * Stage Due Date [days to approve]:

Figure 378: Adding a New Stage to an Approval Workflow

7.5 Changing Record Approval Due Date for Workflow Type

Each PPR is assigned an approval workflow. The final approval due date for the legal records created by the PPR is the due date of the last stage of the selected workflow. To edit the approval due date, follow these steps.

1. Click on *Home* icon
2. Click on *Administration* Tab
3. Click on *Workflow Settings*
4. Click the pencil icon next to the Workflow that needs to be edited
5. Edit the *Stage Due Date (days to approve)* that you would like to modify
 Note: Stage due date is the number of days from the day the record was created and the due date for last stage is the final due date for record approval
6. Click outside of the edited field to save the change

Home > Administration > Workflow Type Inventory > Workflow Type: Supervisor Revi...

Save Save & Exit Save & Add Entry Cancel

Workflow Type: Supervisor Review, Quality Review

Details

* Name:
 Order:

Stages

Order	Stage Name	Legendary Role	Stage Due Date [days to approve]
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> 1	Supervisor Review	Supervisor	1
<input type="checkbox"/> 2	Quality Review	Quality	3

Figure 389: Changing Record Approval Due Date