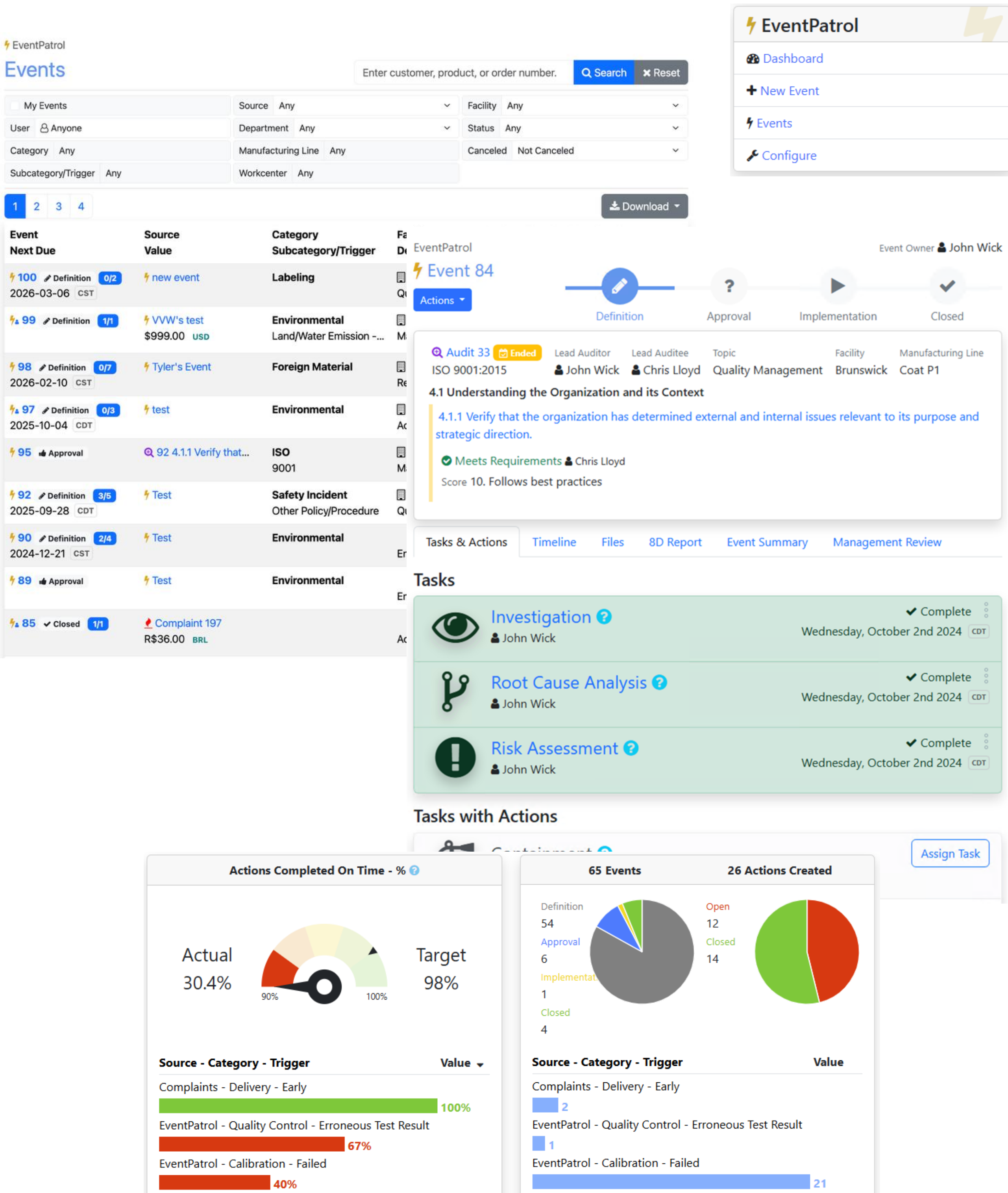
# EventPatrol User Guide
## Version 2026-04



# Contents

# Chapter 1: Introduction

## Introduction

EventPatrol™ is a centralized and standardized tool to document, to investigate, and to resolve undesirable events that occur throughout the organization. The undesirable events do not have to be related to products, customers, or the manufacturing process. Events could originate from a safety incident, a regulatory or environmental violation, or an audit finding. In short, if an event happens that requires someone to take action, EventPatrol is the tool to coordinate and manage those actions. EventPatrol can be licensed for an additional cost in the absence of AuditPatrol or ComplaintPatrol.

## Symbol Key

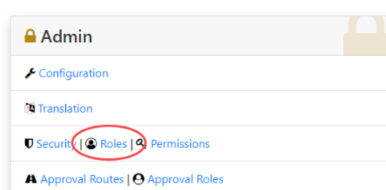
The following symbols are used in this user guide.

| Typeface | Description |
|---|---|
| R | Indicates a “required” data entry field within a UI. |
| NEW | Indicates a new feature, or new information regarding existing functionality. |
| | Indicates rules regarding access security. |
| | Click the help icon to view additional information. |

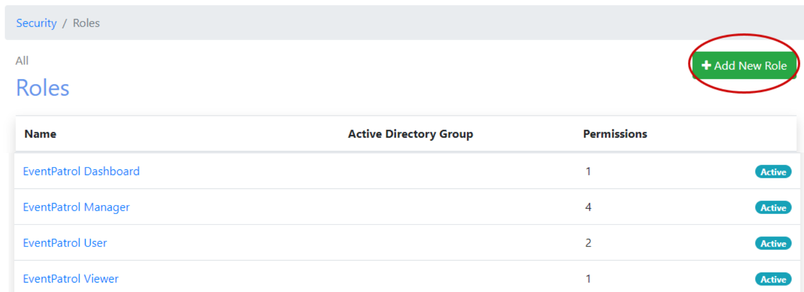
## Browser

EventPatrol is accessed via a browser. PatrolSuite, and all its apps such as EventPatrol, are certified to the following browsers: Google Chrome, Microsoft Edge, or Safari. MAP strongly recommends using only these browsers. Contact your IT department to obtain the URL to access the PatrolSuite homepage from where the EventPatrol app can be accessed.

## Roles




1. The EventPatrol app uses Active Directory to provide user-access. From the PatrolSuite homepage, click on Admin/Roles.
2. MAP recommends creating the following EventPatrol Roles. Click on the ‘Add New Role’ button to create the Roles.




3. Contact your IT department and request that they create an Active Directory group for each of the above roles and that they associate each role with the Active Directory group.
4. Provide the IT department with a list of all users who need to be added into each Active Directory group.

   Note: Granting facility access is typically not done via an EventPatrol Role.

# Permissions

5. MAP recommends granting permissions to each role as follows.

   Note: The EventPatrol Dashboard queries can be resource intensive (i.e. network and server), so be thoughtful about what users are given permission to use the dashboard.

## EventPatrol Dashboard

**EventPatrol**

| | | |
|---|---|---|
| No | Add Action | Allows users to re-open a closed action task, to add new actions, and to close an action task. |
| No | Admin | Allows users to edit the configuration settings and all events, including changing the event owner |
| No | Create | Allows users to create events that originate from EventPatrol. |
| Yes | Dashboard | Allows users to view the EventPatrol dashboard. |
| No | View | Allows users to view all events. |

## EventPatrol Manager

**EventPatrol**

| | | |
|---|---|---|
| Yes | Add Action | Allows users to re-open a closed action task, to add new actions, and to close an action task. |
| Yes | Admin | Allows users to edit the configuration settings and all events, including changing the event owner |
| Yes | Create | Allows users to create events that originate from EventPatrol. |
| Yes | Dashboard | Allows users to view the EventPatrol dashboard. |
| Yes | View | Allows users to view all events. |

## EventPatrol User

**EventPatrol**

| | | |
|---|---|---|
| No | Add Action | Allows users to re-open a closed action task, to add new actions, and to close an action task. |
| No | Admin | Allows users to edit the configuration settings and all events, including changing the event owner |
| Yes | Create | Allows users to create events that originate from EventPatrol. |
| No | Dashboard | Allows users to view the EventPatrol dashboard. |
| Yes | View | Allows users to view all events. |

## EventPatrol Viewer

**EventPatrol**

| | | |
|---|---|---|
| No | Add Action | Allows users to re-open a closed action task, to add new actions, and to close an action task. |
| No | Admin | Allows users to edit the configuration settings and all events, including changing the event owner |
| No | Create | Allows users to create events that originate from EventPatrol. |
| No | Dashboard | Allows users to view the EventPatrol dashboard. |
| Yes | View | Allows users to view all events. |

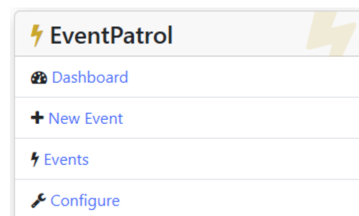
# Chapter 2: Navigation

Users with the following permission can view EventPatrol and its related pages (except the config and dashboard pages which have their own permission).

| | | |
|---|---|---|
| Yes | View | Allows users to view all events. |

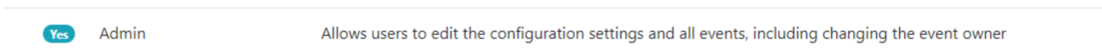
## EventPatrol Card

6. The EventPatrol card on the PatrolSuite homepage contains hyperlinks to the EventPatrol pages.
   a. Dashboard. Enables the user to view the EventPatrol dashboard.
   b. New Event. Enables a user to create a new event that doesn't originate from AuditPatrol or ComplaintPatrol.
   c. Search. Enables a user to search events including those that originated from AuditPatrol or ComplaintPatrol.
   d. Configure. Enables a user to access the configuration pages.

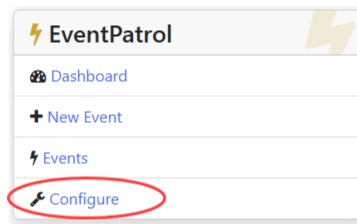


# Chapter 3: Configuration

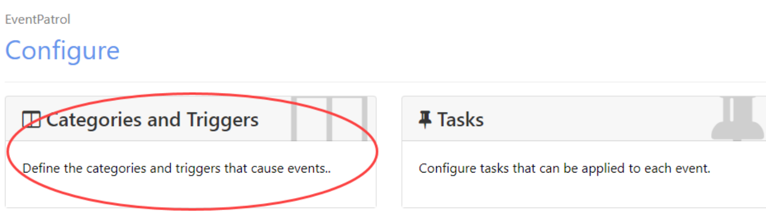
Users with the following permission can view and edit the EventPatrol/Configure pages.




## Categories

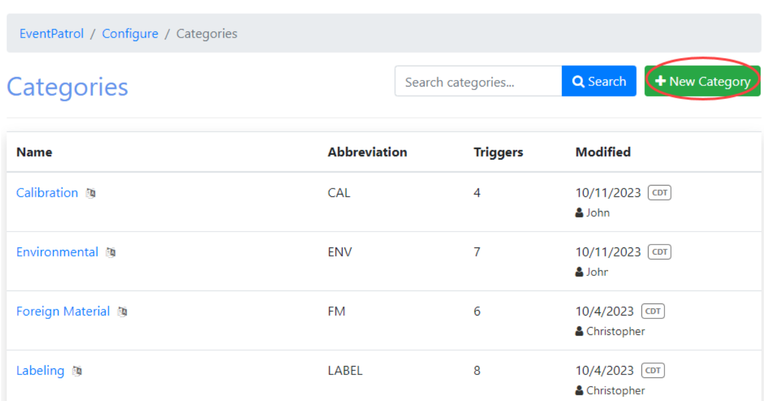



7. Click on the “Configure” hyperlink in the EventPatrol card on the PatrolSuite homepage.
8. Click on the Categories and Triggers card.

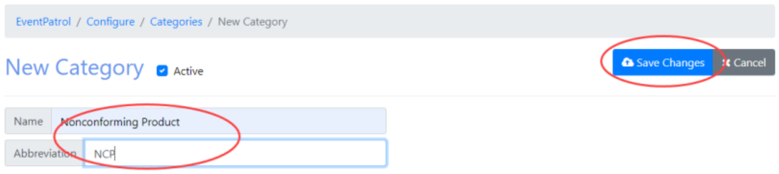



The Categories page allows a user to define the categories for which events are organized.

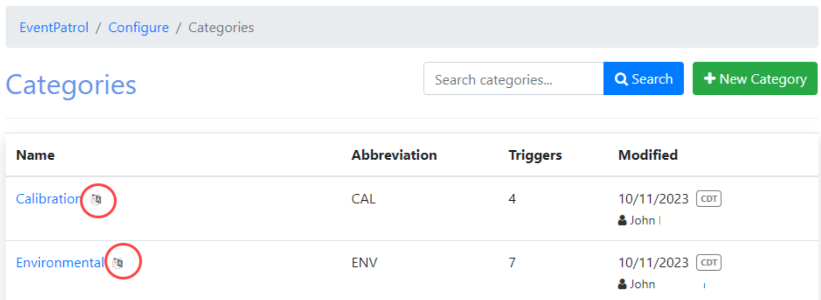
9. To add a new category, click on the ‘New Category’ button.



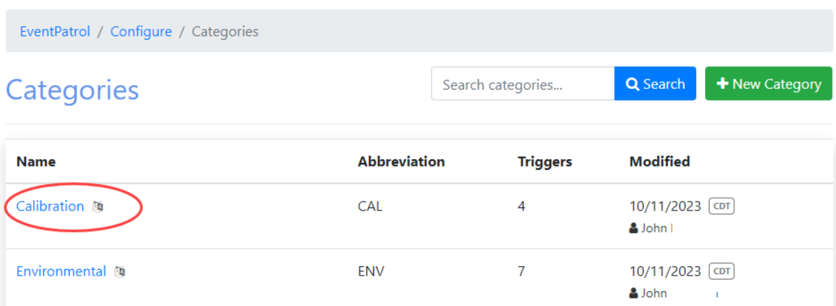

   a. Enter the category name and abbreviation and click ‘Save Changes.’



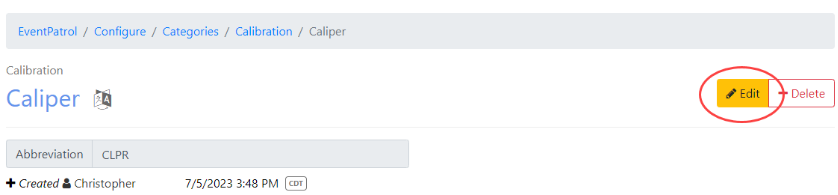

10. To localize the category into other languages, click the localization icon and edit the desired languages.



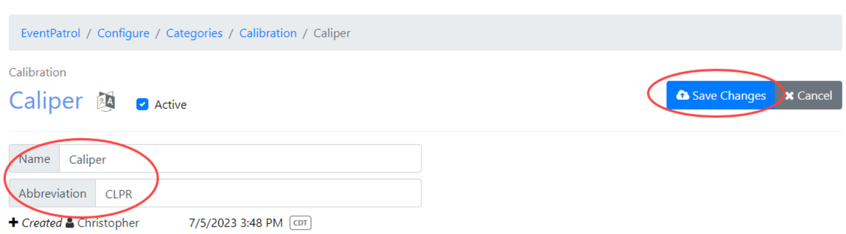

11. To edit an existing category, click the category name.




a. Click the Edit button.



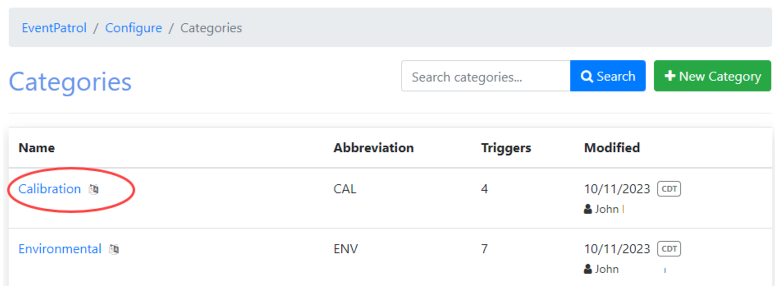

b. Edit the name or abbreviation and click Save Changes.



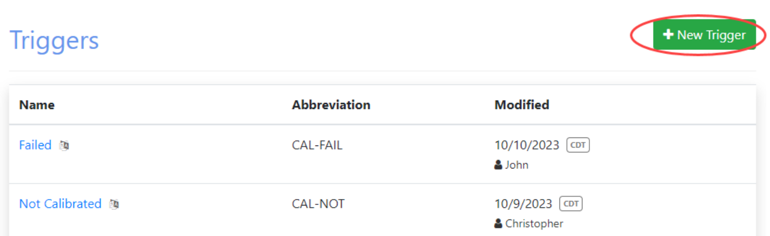

Note: Categories that have been consumed by an event cannot be deleted. However, they can be deactivated by unchecking the "Active" checkbox.

# Triggers

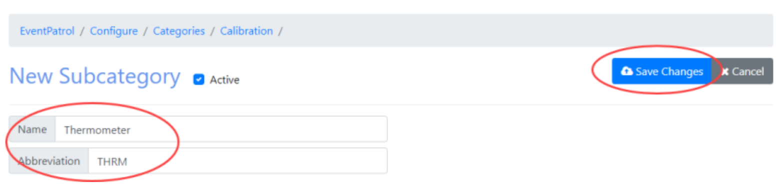
12. Each category can be further organized into specific triggers that caused the event. Click on the desired category name.



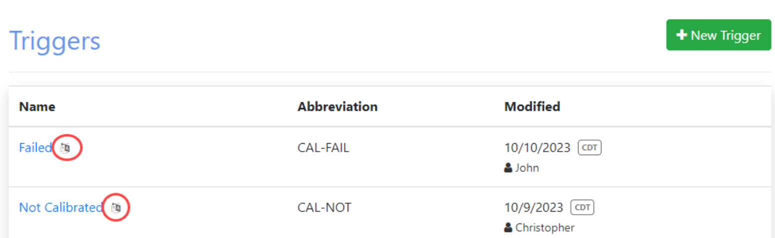

13. To add a new trigger, click on the 'New Trigger' button.



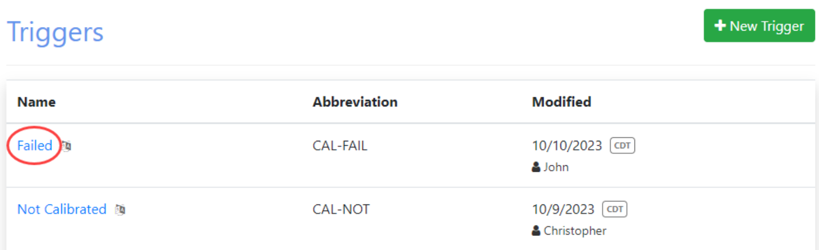

   a. Enter the trigger name and abbreviation and click 'Save Changes.'



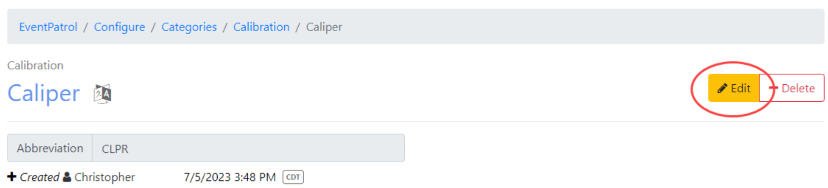

14. To localize the trigger into other languages, click the localization icon, click the 'Edit' button, enter the trigger name in the desired languages, and click the 'Save Changes' button.



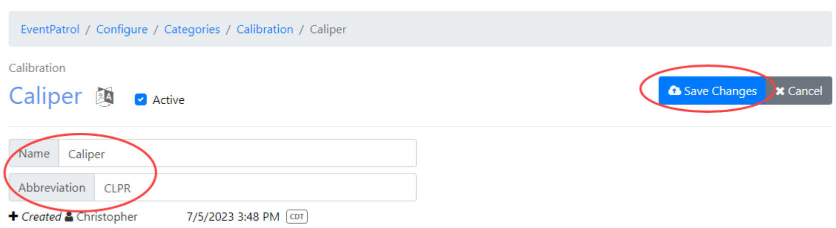

15. To edit an existing trigger, click the trigger name.




a. Click the ‘Edit’ button.



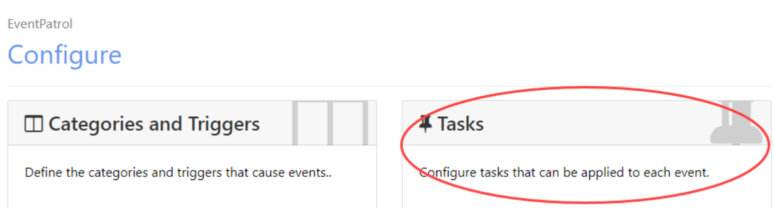

b. Edit the name or abbreviation and click ‘Save Changes.’



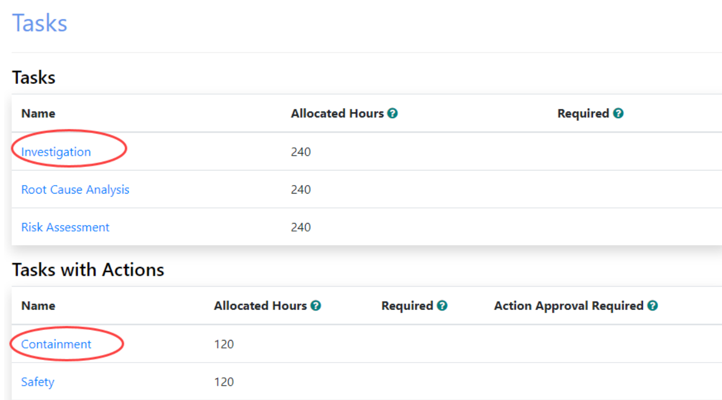

Note: Triggers that have been consumed by an event cannot be deleted. However, they can be deactivated by unchecking the “Active” checkbox.

# Tasks

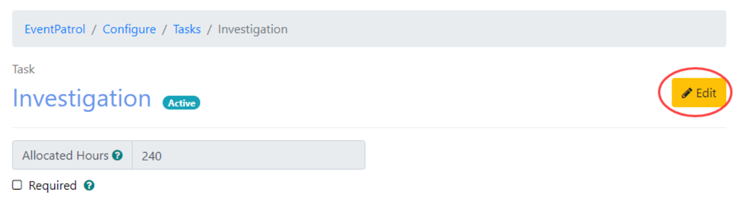
16. To manage the rules regarding tasks, click on the Tasks card.



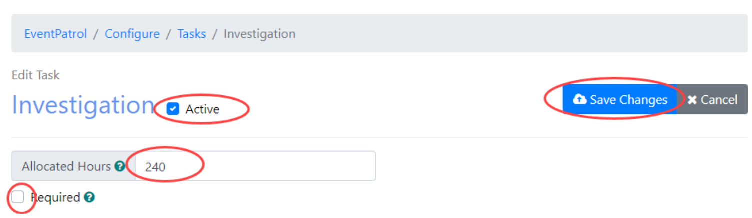

17. Click on the desired Task name.



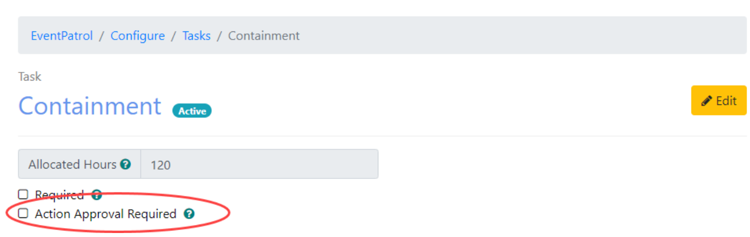

18. Click the ‘Edit’ button.




19. Check the “Active” checkbox to make the task active (checked) or inactive (unchecked). Edit the Allocated hours as desired (default = 240). Check the “Required” checkbox to make the task required for every event. Uncheck the “Required” checkbox to let the Event Owner choose whether or not the event is required for each event. Click the help icon for additional information.

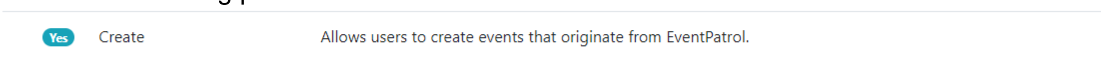



20. For Tasks with Actions, there is an additional “Action Approval Required” checkbox. Check this checkbox to require all actions defined under the task to require approval before the notification is sent to the action responsible person (ARP) to begin the action.



# Chapter 4: New Event

Users with the following permission can create new events.




## Event Sources

Events can originate from three modules within PatrolSuite:

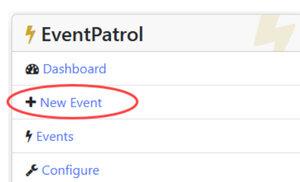
**AuditPatrol**. Each question in an audit can be related to one event. AuditPatrol events should be created only from within the AuditPatrol app.

**ComplaintPatrol**. Each customer complaint can be related to one event. ComplaintPatrol events should be created only from within the ComplaintPatrol app.

**EventPatrol**. This chapter covers creating events from EventPatrol.

## New Event

21. Click on the “New Event” hyperlink in the EventPatrol card, or on the “New Event” hyperlink in the main menu of EventPatrol.

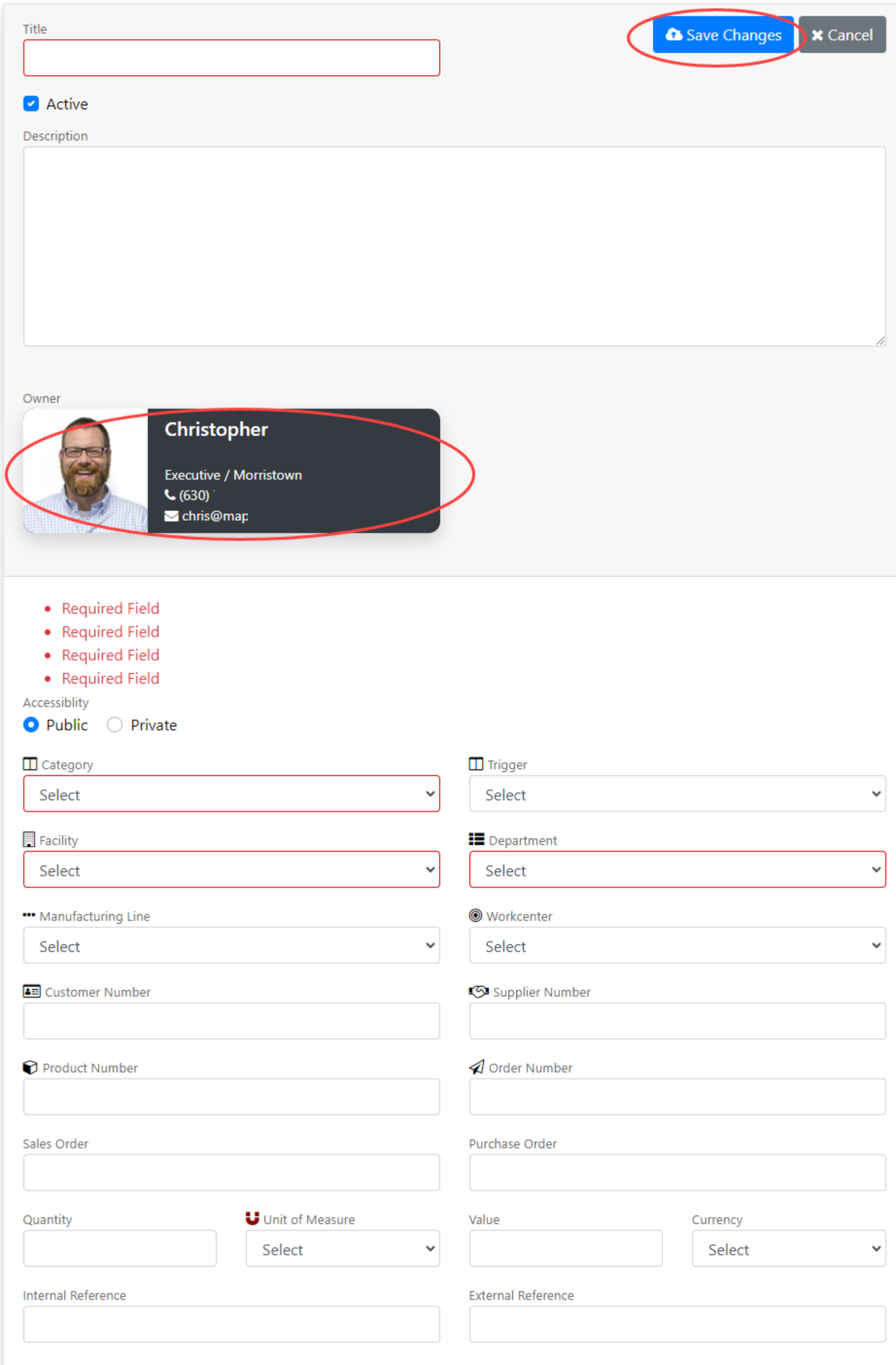



22. Enter the event title and select the other required fields shown in the image below. Enter additional information as applicable and click ‘Save Changes.’

    Note: The user creating the event is assigned as the event owner by default. To choose a different event owner, click on the event owner card and select a user from the user search list.

    Note: Upon saving the event, the event owner will receive an action request in his/her My Task list, so choose the correct event owner before saving the event for the first time.

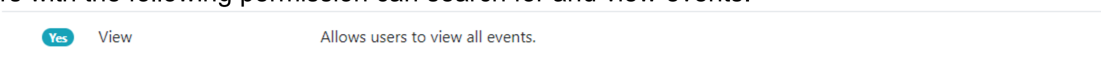
    Note: Events themselves do not have a due date. The tasks and actions within the event have due dates.




Note: Upon saving the event, the event will appear in the Search Events page along with events that originated from AuditPatrol and ComplaintPatrol.

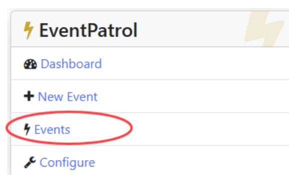
# Chapter 5: Search Events

Users with the following permission can search for and view events.

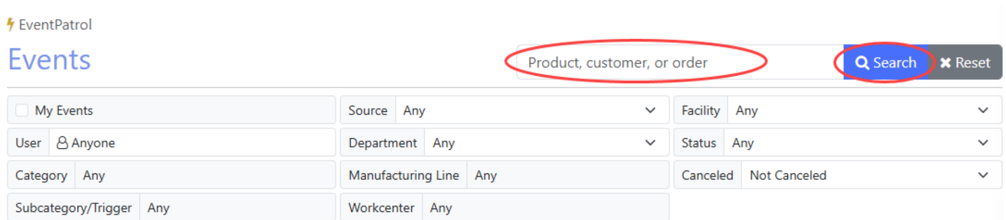



## Event Search

23. Click on Events hyperlink in the EventPatrol card.




24. Enter a product, customer, or order number and click Search to locate an event.




## Event Filters

25. Use the event filters to locate a desired event.
    a. **My Events**. Check the checkbox to view events in which you have a role.
    b. **Source**. Select the PatrolSuite app where the event originated.
    c. **Facility**. Select a desired facility to view events only for the chosen facility.
    d. **User**. Select a desired user to view only events in which the user has a role.
    e. **Category and Subcategory/Trigger**. Select a desired category and subcategory/trigger to view events only for the chosen category and subcategory/trigger.

       Note: A Source must be chosen before a category can be selected.

       Note: A Category must be chosen before a subcategory/trigger can be selected.
    f. **Department**. Select a desired department to view events only for the chosen department.

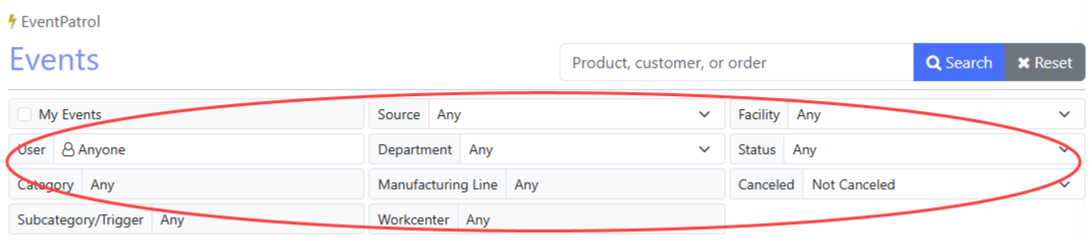
g. **Manufacturing Line**. After first choosing a facility, select a desired manufacturing line to view events only for the chosen manufacturing line.

   Note: A Facility must be chosen before a manufacturing line or workcenter can be selected.

h. **Workcenter**. After first choosing a facility, select a desired workcenter to view events only for the chosen workcenter.

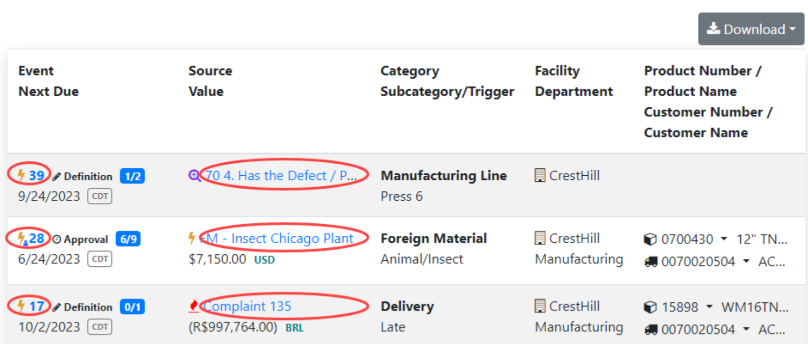
i. **Status**. Select the desired event status.

j. **Canceled**. Select the desired cancelation status.




# Event Grid

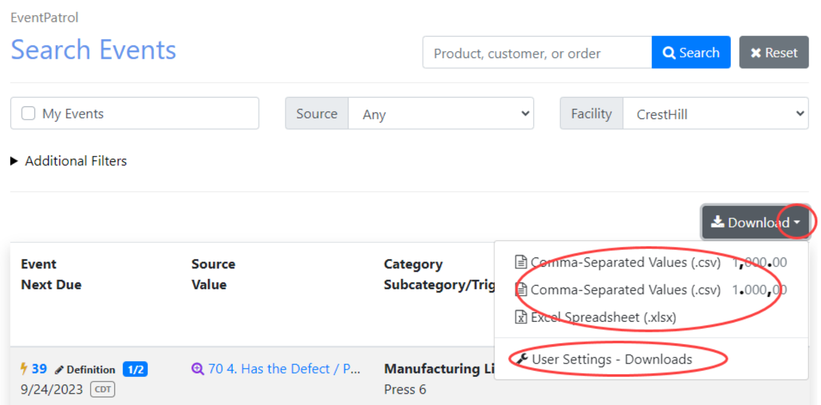
26. Each event has two hyperlinks:
    a. **The event number**. Click this hyperlink to open the event Tasks page.
    b. **The source**. Click this hyperlink to open the event source page.



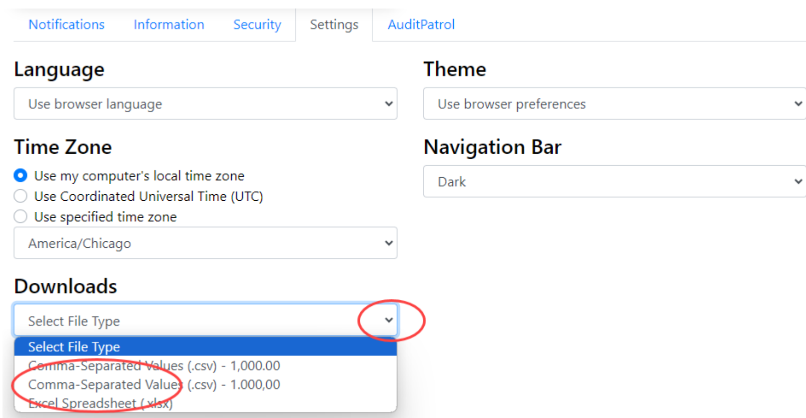

Note: The icons indicate the source of the event. The lightning bolt indicates an event that originated from EventPatrol.

# Download

27. To download the EventPatrol data in the search grid, click on the dropdown menu arrow on the right side of the Download button.
28. Choose the desired CSV format for the data, click on the Excel Spreadsheet menu choice to view the data in a spreadsheet.




29. Click on “User Settings – Downloads” to manage your preferences related to all downloads in PatrolSuite. On the User Profile page, click on the Downloads dropdown and choose the desired action when the left side of the Downloads button is clicked.




The image below shows the download data columns.

| | A | B | C | D | E | F | G | H | I | J | K | L |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | EventId | Due | ItemType | EventValue | CategoryName | SubCategoryName | FacilityName | Department | ProductNumber | ProductName | CustomerNumber | CustomerName |
| 2 | 39 | 9/25/2023 0:00 | Audit | | Manufacturing Line | Press 6 | CrestHill | | | | | |
| 3 | 28 | 6/25/2023 0:00 | Event | 7150 | Foreign Material | Animal/Insect | CrestHill | Manufacturing | 700430 | 12" TNB WIP CRUST | 70020504 | ACME Corporation |
| 4 | 17 | 10/3/2023 0:00 | Complaint | -997764 | Delivery | Late | CrestHill | Manufacturing | 15898 | WM16TNBSUPPZ6/50.5Z | 70020504 | ACME Corporation |

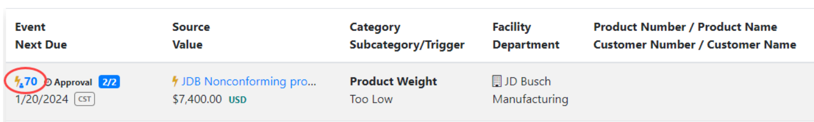
# Chapter 6: Event Overview

Users with the following permission can search for and view events.

| | | |
|---|---|---|
| Yes | View | Allows users to view all events. |

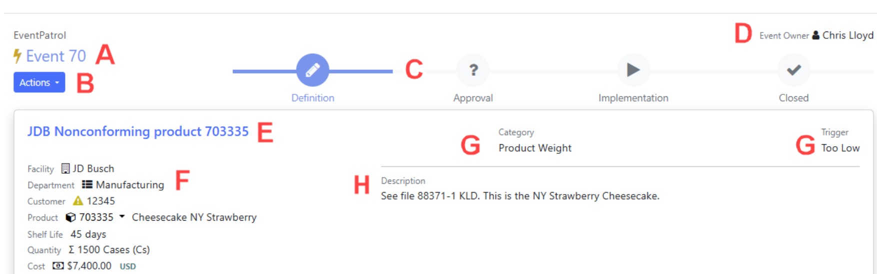
## Event Header

30. On the Search Events page, click on the event number an event that originated from EventPatrol to open the event's Tasks & Action page.




The event header is opened. It is organized as follows:

A. Event number
B. Action button. Click on this button to reveal a submenu that enables a user to:
   i Change the Event Owner.
   ii Reopen Tasks. This enables the Event Owner to continue assigning tasks to Task Leaders.
   iii Cancel the event.
C. Event Status
D. Event Owner ID
E. Event Title
F. Event Meta data
G. Event Category and Subcategory/Trigger
H. Event Description



# Event Body

The event body is organized as follows:

I. The information tabs.

   i **Tasks & Actions**. Enables the Tasks and Tasks with Actions to be managed.

   ii **Timeline**. Provides a breakdown of how long each event activity took to complete.

   iii **Files**. Enables files related to the event to be uploaded and viewed.

   iv NEW **8D Report**. Displays the event information in a structured format based on the "Eight Disciplines" problem solving methodology. This report is commonly used as the formal response to a customer complaint.

   v NEW **Event Summary**. Enables a written summary of the entire event to be created and viewed.

   vi NEW **Management Review**. Displays the event information and summary statistics in a format designed to facilitate Management Review. The intended audience of this report is supervisors and managers who need more information than is provided in the 8D Report.

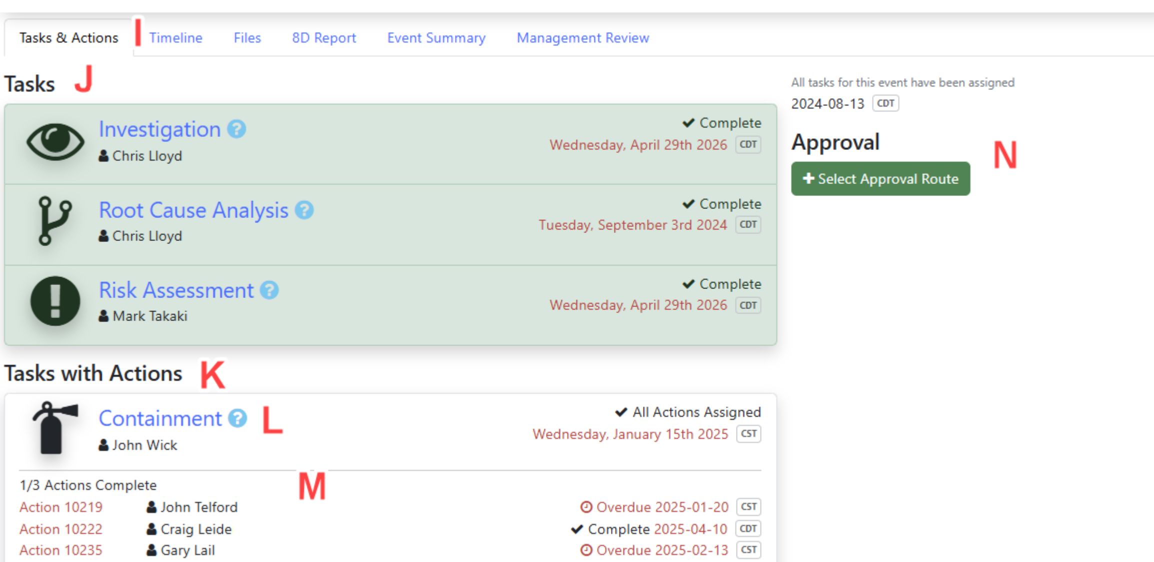
J. The Tasks that can be assigned and completed. Typically, the Tasks are completed to inform the Event Owner before the Event Owner decides which Tasks with Actions to assign.

K. The Tasks with Actions that can be proposed and completed.

L. Task with Action Name. Click on the name to open the task.

M. For those Tasks with Actions that have been assigned to a task leader, the actions are displayed here, each with a status summary.

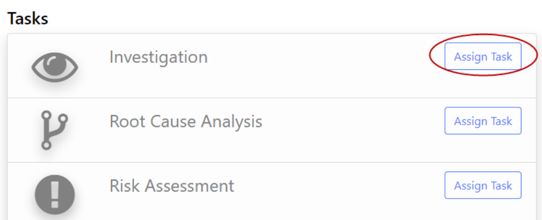
N. The approval routes that can be chosen and completed.



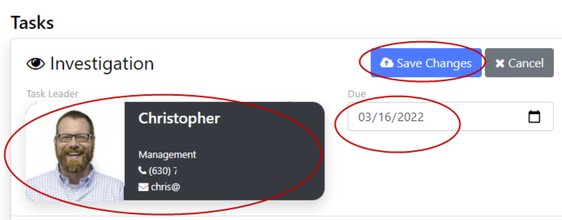
# Chapter 7: Tasks - Investigation

## Investigation Task Assignment

31. To assign the investigation task to a Task Leader who is responsible for performing the investigation, click on the ‘Assign Task’ button.



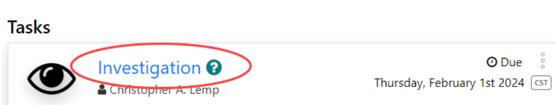

    a. The task leader will default to yourself. To pick a different task leader, click anywhere on the task leader card and choose a different user. Assign a due date (the default due date is in ten days) and click the ‘Save Changes’ button.




Note: The task leader will receive a task notice advising him/her of the need to complete the task.

32. Each task displays the name of the Task Leader and the due date. To open the task, click on the task name. To edit the task, click on the ellipses and choose Edit from the submenu.


33. To view the investigation information, click on the Investigation task.




The investigation is organized into four activities:

    a. Problem Analysis

b. Problem Statement

c. Recommendations

d. Investigation Summary

Note: Parts or all of these activities may be "required" depending on configuration settings. Nonetheless, it is up to the discretion of the investigator to use these tools appropriately based on the circumstances of the event.

Note: The problem statement appears in the 8D Report and Management Review.

Note: The Investigation Summary appears in the Management Review.

Note: Management may be asked to review and approve the results of the investigation before actions are defined and implemented.

# Problem Analysis

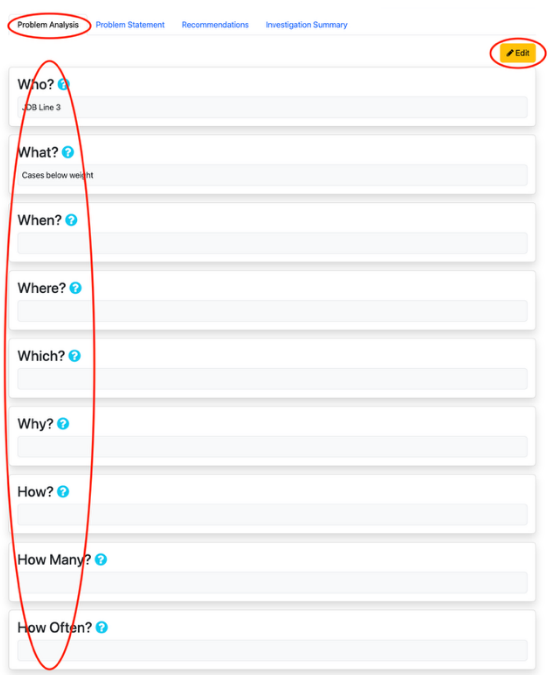
The purpose of the problem analysis step is to document the information that is subsequently used to create the problem statement.

NEW Note: A good investigator will sped more time answering these questions and very little time writing the problem statement because PatrolBot artificial intelligence will use these answers to write the problem statement for the investigator.

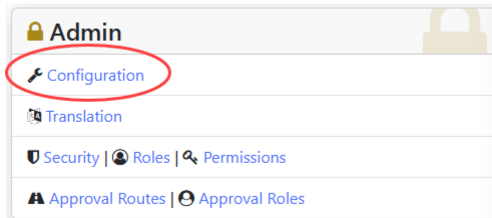
34. To document the results of the problem analysis, click on the 'Edit' button.

    a. Document the Who, What, When, Where, Which, Why, How, How Many, and How Often. Click on the help icon for additional information regarding each section.

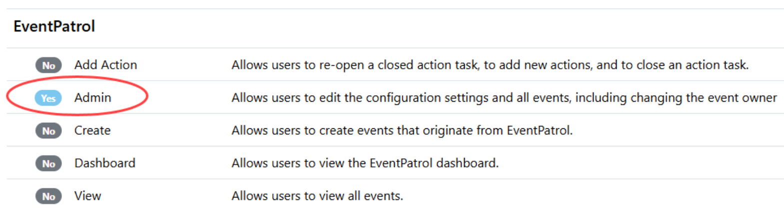
    b. Click the 'Save Changes' button.



35. To manage what problem analysis information is required, click on the Admin/Configuration hyperlink.

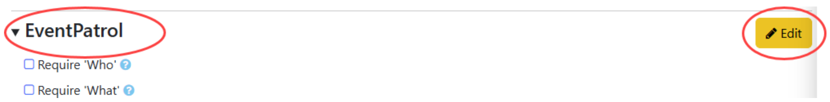



To manage EventPatrol configuration settings, users must be in a role that grants the following permission:

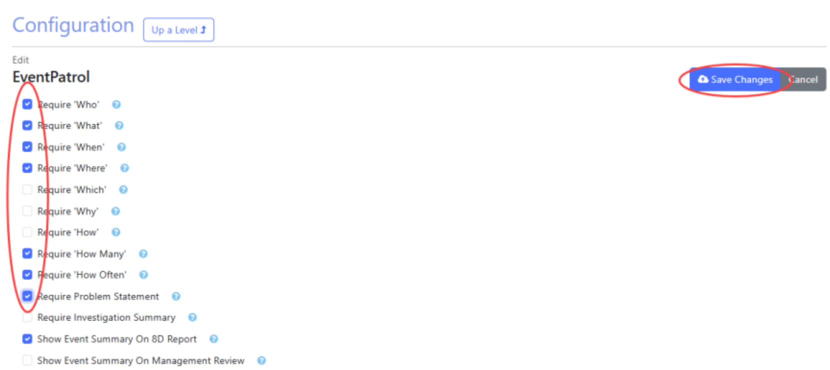


| EventPatrol | | |
|---|---|---|
| No | Add Action | Allows users to re-open a closed action task, to add new actions, and to close an action task. |
| Yes | Admin | Allows users to edit the configuration settings and all events, including changing the event owner |
| No | Create | Allows users to create events that originate from EventPatrol. |
| No | Dashboard | Allows users to view the EventPatrol dashboard. |
| No | View | Allows users to view all events. |

a. Click on the EventPatrol text to expand the menu items and click on the ‘Edit’ button.



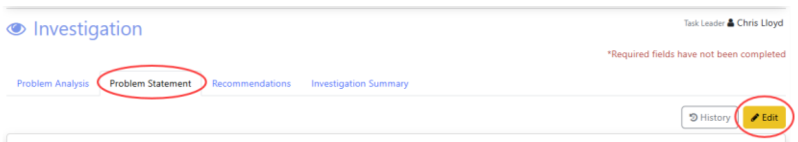

b. Select the information that will be required for every problem analysis and click the ‘Save Changes’ button.



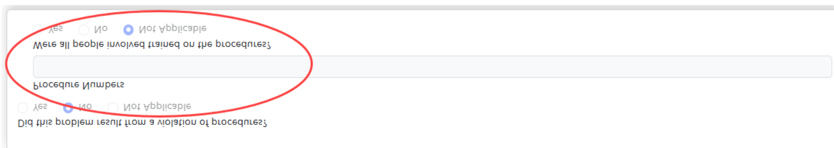

# NEW Internal Problem Statement

The intended audience of the internal problem statement is limited to company employees only. Accordingly, the internal problem statement may contain information or references that otherwise would not be shared with customers or other third parties.

36. To draft the internal problem statement, click on the “Problem Statement” tab and then click the ‘Edit’ button.

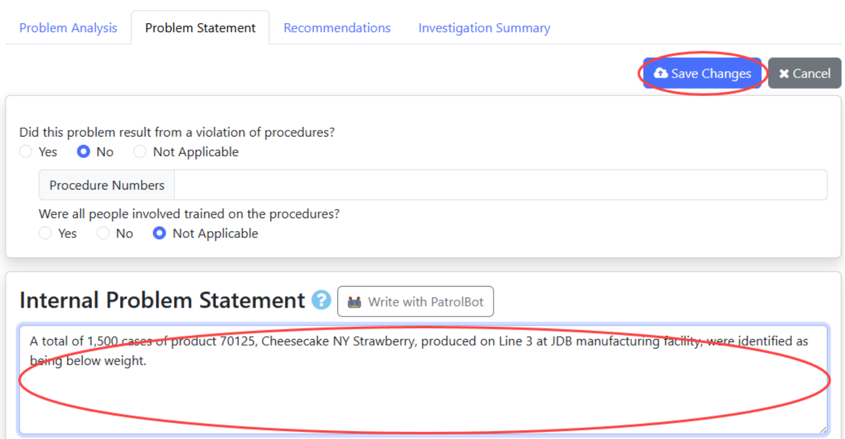



a. Answer the questions regarding procedures and document the procedure numbers as applicable.



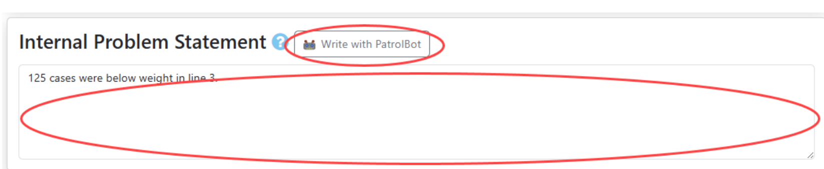
There are two options for writing the Internal Problem Statement:

b. **Write with Keyboard**. Click into the problem statement cell and use your keyboard to type the statement and click the ‘Save Changes’ button.

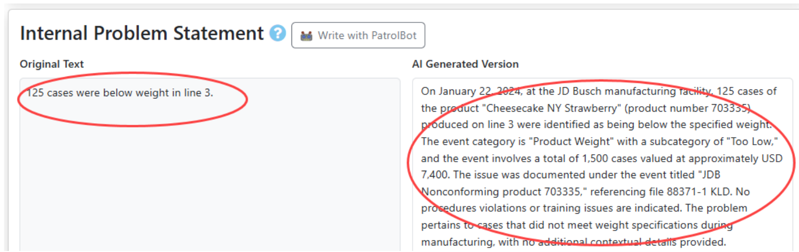



c. **Write with PatrolBot**. Click on the ‘Write with PatrolBot’ button and let artificial intelligence write the statement.

Note: PatrolBot will not be able to draft a good problem statement unless the questions on the Problem Analysis tab are answered with sufficient detail.

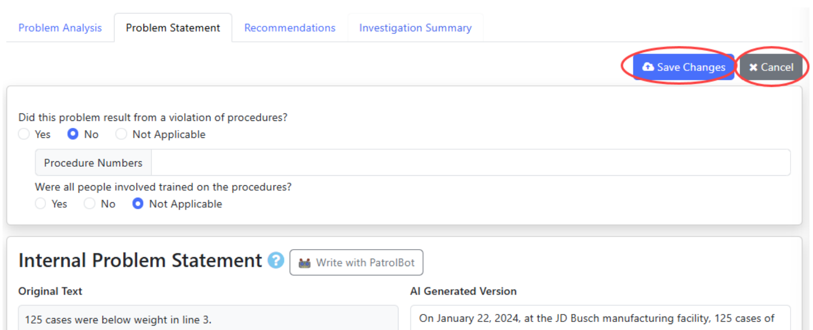



Note: If a problem statement already exists, then both the Original Text and the suggested AI Generated Text will be presented side by side.

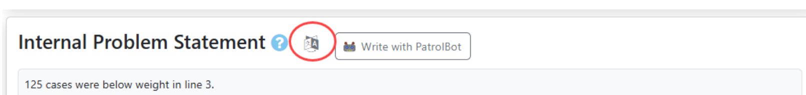



i. To accept the AI Generated problem statement, click on the ‘Save Changes’ button.

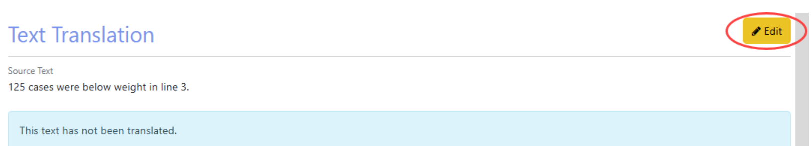
ii. To retain the Original Text (and disregard the AI Generated problem statement), click on the ‘Cancel’ button.



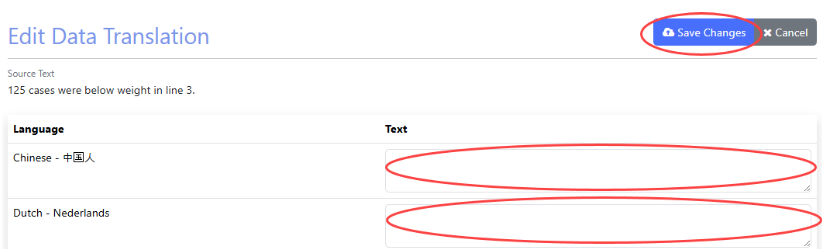

37. To translate the problem statement into required languages, click on the localization icon.




a. Click the ‘Edit’ button.




b. Enter the localized text and click the ‘Save Changes’ button.



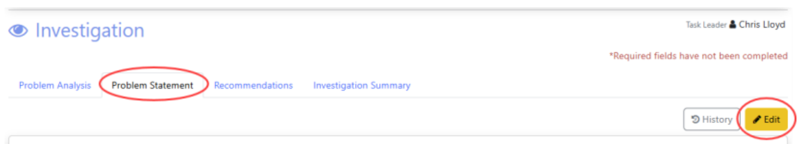

# NEW External Problem Statement

The intended audience of the external problem statement includes customers or other external parties.

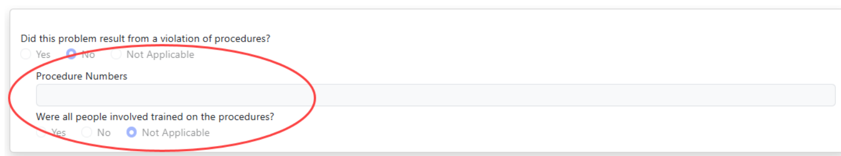
Accordingly, the external problem statement is cleansed so that it does not contain information or references that are not appropriate to be shared with customers or other external parties.

Note: The external problem statement appears on the Complaint 8D Report which is typically provided to customers in response to a customer complaint.

38. To draft the external problem statement, click on the "Problem Statement" tab and then click the 'Edit' button.

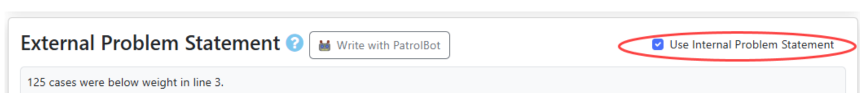



a. Answer the questions regarding procedures and document the procedure numbers as applicable.

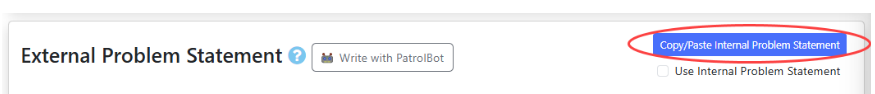



There are four options for writing the External Problem Statement:

b. **Use the Internal Problem Statement**. Check the "Use Internal Problem Statement" checkbox and click the 'Save Changes' button. This will place an exact copy of the internal statement into the external problem statement cell, which will not be editable. If the internal problem statement changes, then the external problem statement will be automatically updated to match the internal statement.



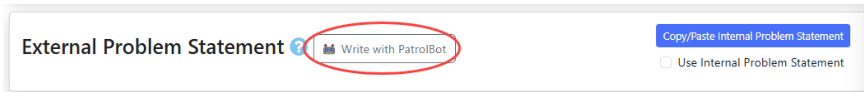

c. **Start from the Internal Problem Statement and then edit it.** Click the 'Copy/Paste Internal Problem Statement' button. This will place an exact copy of the internal statement into the external problem statement cell, which can be edited as desired (e.g. to remove confidential or sensitive information). Click the 'Save Changes' button.



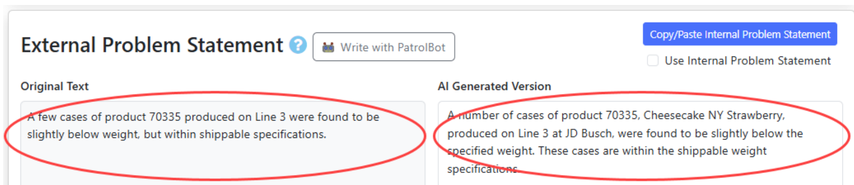

d. **Write with Keyboard**. Click into the problem statement cell and use your keyboard to type the statement and click the 'Save Changes' button.


e. **Write with PatrolBot**. Click on the 'Write with PatrolBot' button and let artificial intelligence write the statement.

Note: PatrolBot will not be able to draft a good problem statement unless the questions on the Problem Analysis tab are answered with sufficient detail.

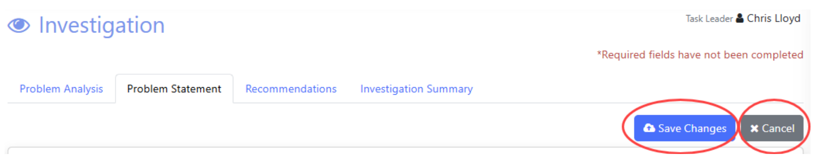



Note: If a problem statement already exists, then both the Original Text and the suggested AI Generated Text will be presented side by side.



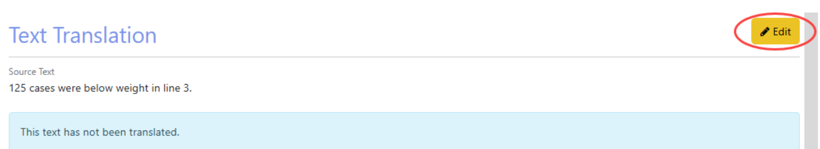

i. To accept the AI Generated problem statement, click on the ‘Save Changes’ button.

ii. To retain the Original Text (and disregard the AI Generated problem statement), click on the ‘Cancel’ button.

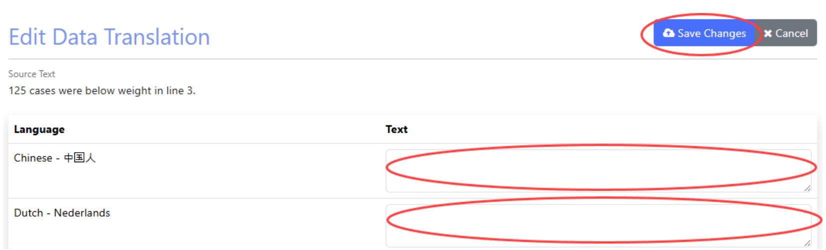



39. To translate the problem statement into required languages, click on the localization icon.


a. Click the ‘Edit’ button.




b. Enter the localized text and click the ‘Save Changes’ button.




# Recommendations

40. The purpose of the Recommendations tab is to enable the Investigator to communicate to the Event Owner his/her recommendations regarding what to do next. On the Recommendations tab, click on the

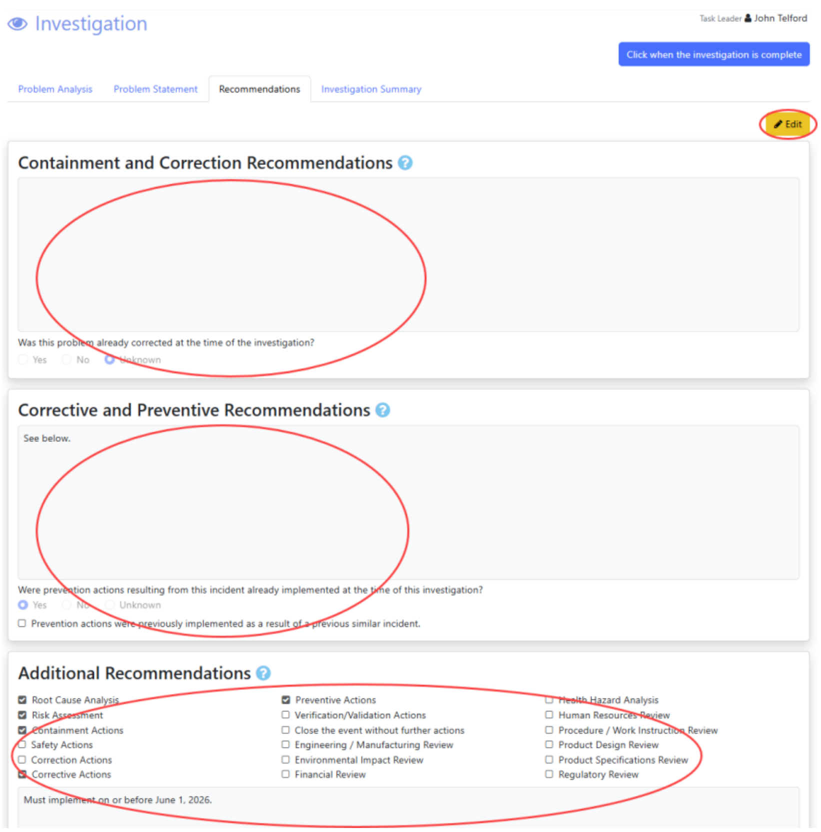
'Edit' button and:

a. Record recommendations for containment and correction action.

b. Record recommendations for corrective and preventive action.

c. Record any additional recommendations including checking the appropriate checkbox reflecting additional actions that are recommended as a result of the investigation. These recommendations will be reviewed and considered by the Event Owner as he/she decides what actions to take.

d. Click the Save Changes button.

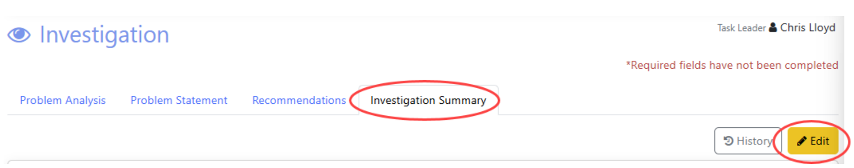



## Investigation Summary

The intended audience of the investigation summary is limited to company employees only. Accordingly, the investigation summary may contain information or references that otherwise would not be shared with customers or other third parties.

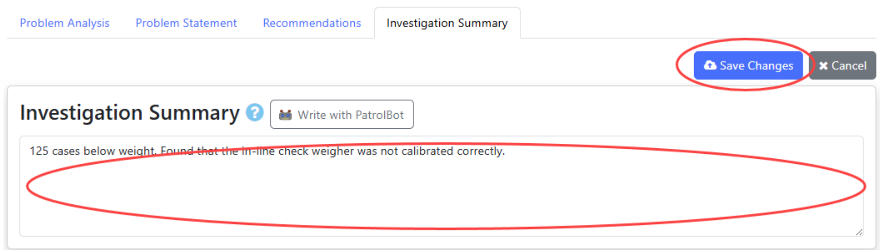
Note: The investigation summary appears on the event's Management Review report.

41. To draft a written summary of the investigation activities and findings, click on the Investigation Summary tab and click the 'Edit' button.

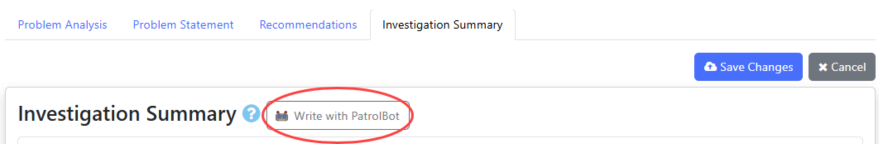


There are two options for writing the Investigation Summary:

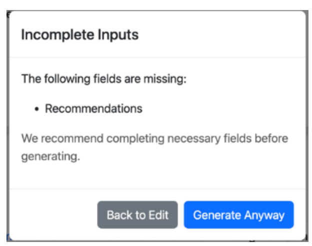
a. **Write with Keyboard**. Click into the investigation summary cell and use your keyboard to type the summary. When finished, click the 'Save Changes' button.



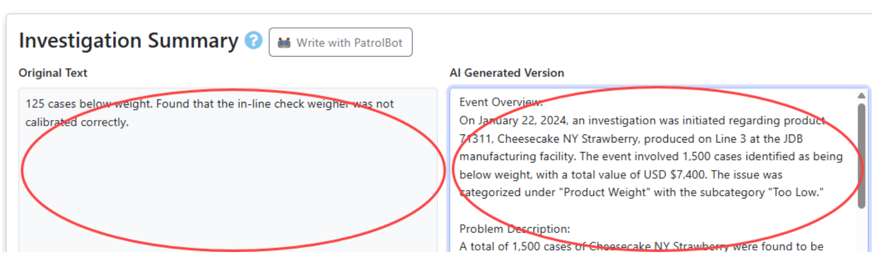

b. **Write with PatrolBot**. Click on the 'Write with PatrolBot' button and let artificial intelligence write the summary.




Note: The Problem Analysis, Problem Statement, and Recommendations tabs must be completed with sufficient information to enable PatrolBot to draft a good investigation summary. If these tabs are incomplete, then a warning will be given. Click the 'Back to Edit' button to document additional information before writing the investigation summary. Click the 'Generate Anyway' button to write the investigation summary despite the missing information.

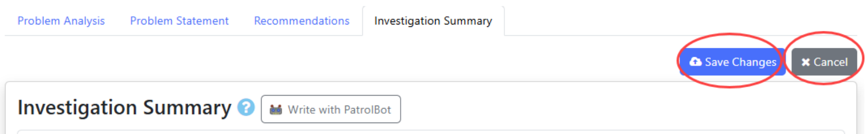



Note: If an investigation summary already exists, then both the Original Text and the suggested AI Generated Text will be presented side by side.

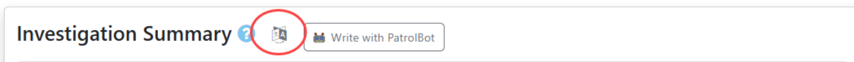



i. To accept the AI Generated investigation summary, click on the 'Save Changes' button.

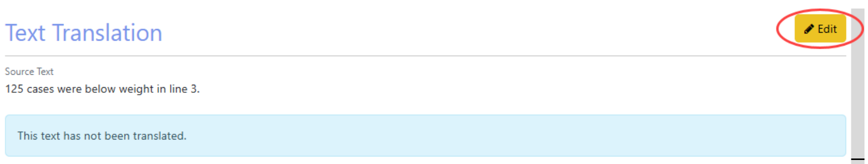
ii. To retain the Original Text (and disregard the AI Generated investigation summary), click on the 'Cancel' button.



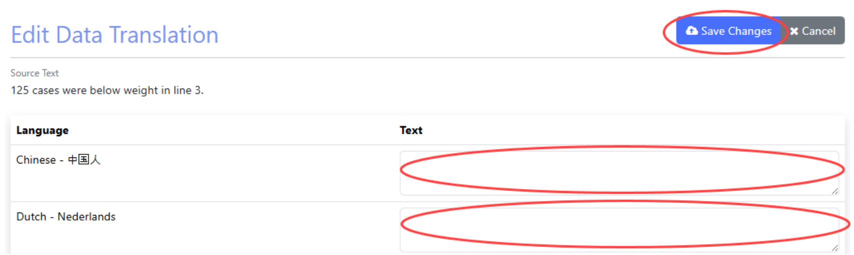

42. To translate the investigation summary into required languages, click on the localization icon.




a. Click the ‘Edit’ button.

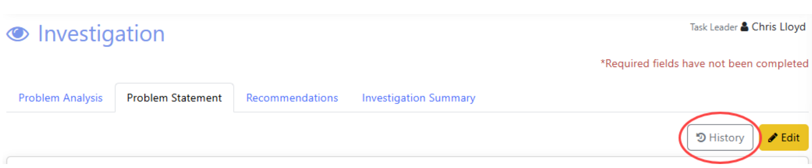



b. Enter the localized text and click the ‘Save Changes’ button.

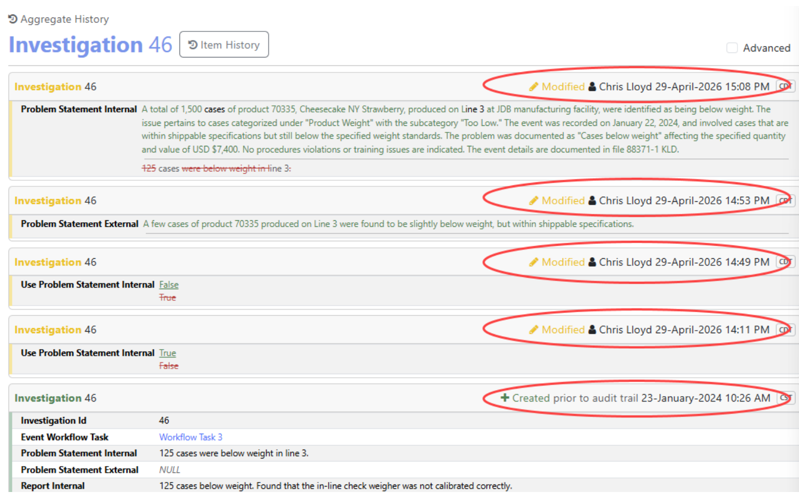



## NEW Investigation History

43. To view an audit trail of changes to the investigation tabs, click the ‘History’ button.




Note: The changes are sorted by date with the most recent changes at the top.

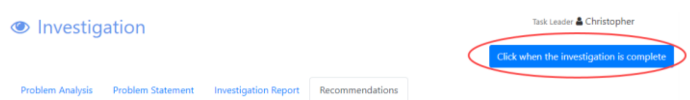



Note: Older information such as problem statements can be retrieved by copying them from the history and pasting them back into the appropriate cell.

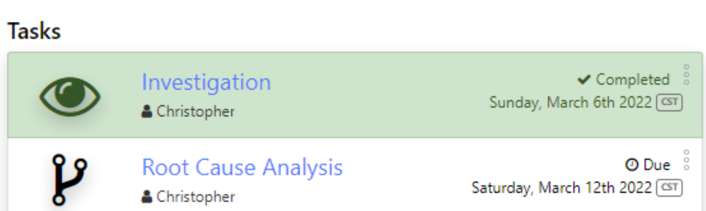
44. To view more detailed (and more technical) information, check the “Advanced” checkbox.


# Complete the Investigation

45. Click on the “Click when the investigation is complete” button once the investigation has been completed and all information has been recorded.




Note: Once the task has been completed, it will appear on the event page with a green background.



# Chapter 8: Tasks - Root Cause Analysis (RCA)

Contact your quality department for training and guidance on how to conduct root cause analysis. EventPatrol facilitates the two most popular approaches to root cause analysis:

**5 Why's**. This approach emphasis sequential thinking.

**Fishbone diagram**. This approach emphasizes categorical thinking.

Regardless of which approach you choose (e.g. 5 Why's), the information is displayed on the other approach's tab (e.g. Fishbone).

## Assign and Open the RCA Task

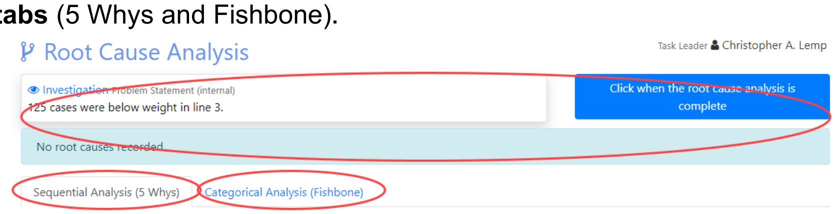
46. Follow the instructions in the preceding chapter to assign this task to a Task Leader and to open the task.

## RCA Page Overview

The RCA page is organized into two areas.

**The summary information** displays the problem statement and the chosen root causes. Additionally, the completion status of the task is managed here.

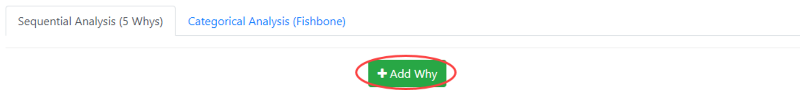
**The RCA tabs** (5 Whys and Fishbone).



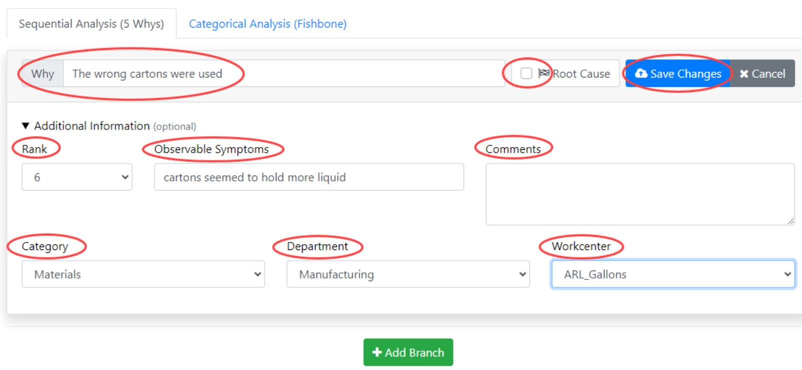

## 5 Whys

47. Click on the "Sequential Analysis (5 Whys)" tab.

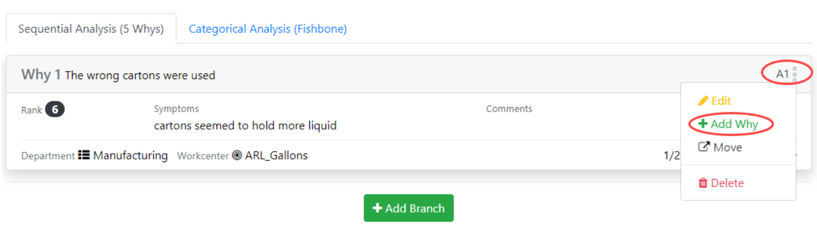
48. Click the Add Why button.



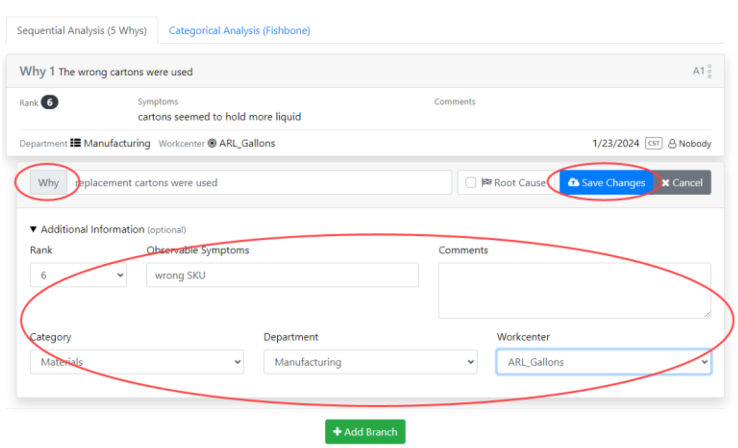

49. Document the Why. Optionally, document the rank (represents the likeliness of being the root cause), observable symptoms, comments, category, department (where the cause originated), and workcenter (where the cause originated).
50. If the Why is a root cause, check the Root Cause checkbox.
51. Click Save Changes. This will create the first "branch" (A) and the first Why (1).



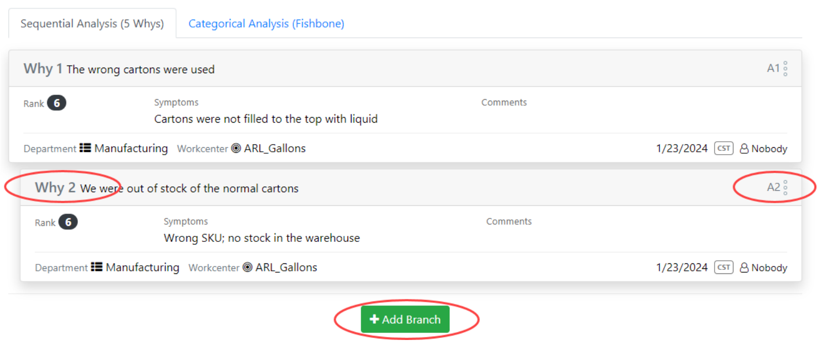

52. To add a sequential why underneath Why 1, click on the branch/why code (A1). Then click on '+ Add Why' in the submenu.




53. Document the Why. Optionally, document the rank (represents the likeliness of being the root cause), observable symptoms, comments, category, department (where the cause originated), and workcenter (where the cause originated). If the Why is a root cause, check the Root Cause checkbox.

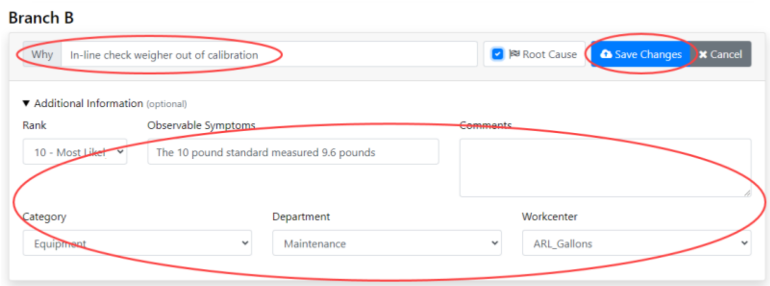


54. Click Save Changes. This will create the next Why (#2) in branch A. Note that the Why can be moved up or down, or to a different branch, by clicking on the Why code and selecting the Move option form the menu.

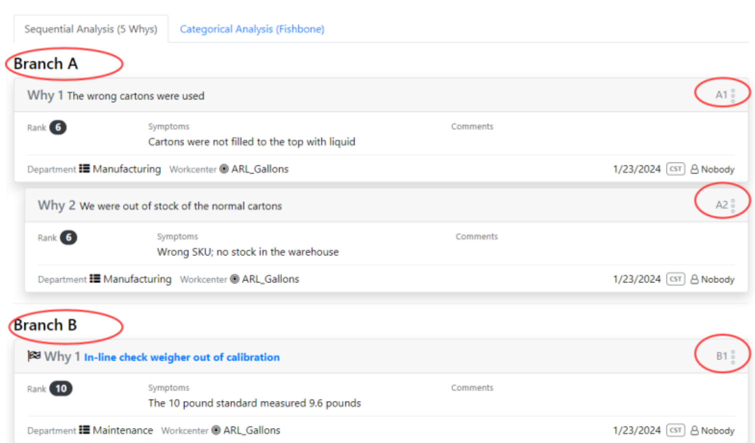



55. To start a new branch, click the Add Branch button.

56. Document the Why. Optionally, document the rank (represents the likeliness of being the root cause), observable symptoms, comments, category, department, and workcenter. If the Why is a root cause, check the Root Cause checkbox.



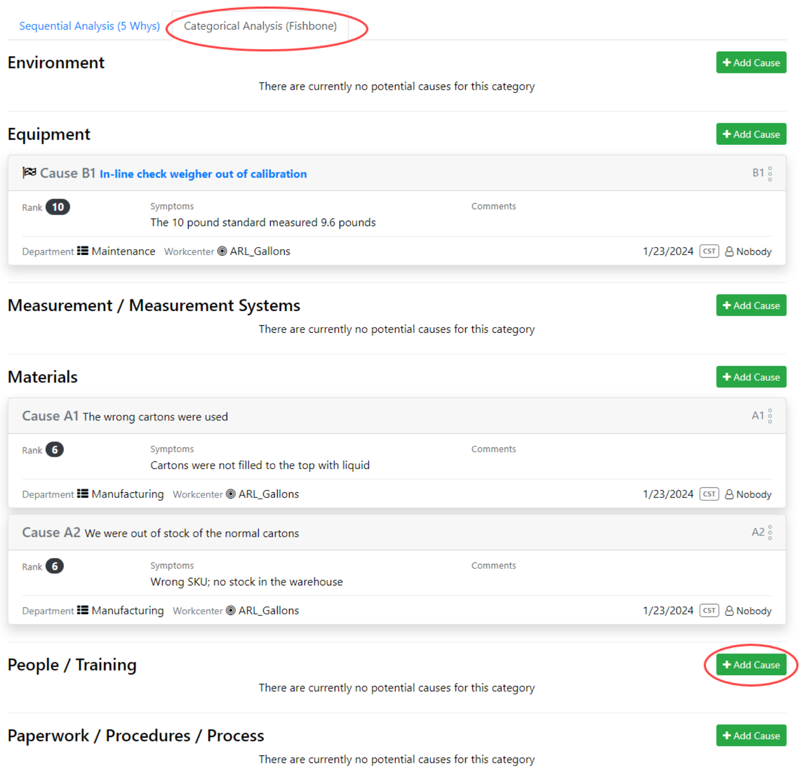

57. Click Save Changes. This will create the first Why in Branch B.



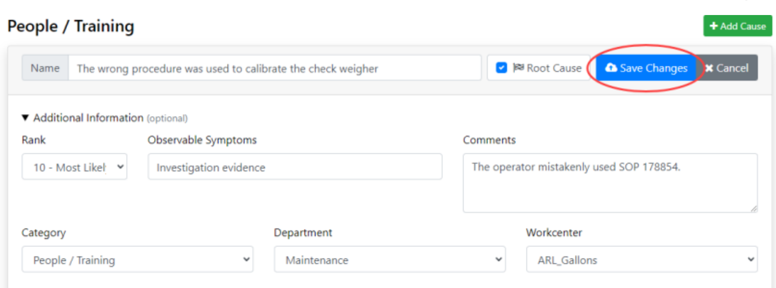

58. Repeat the preceding steps in this section until all the Whys are documented in their appropriate branch.

# Fishbone Diagram

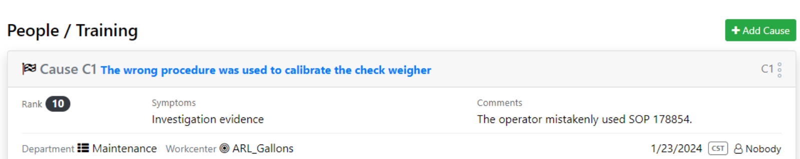
59. Click on the “Categorical Analysis (Fishbone)” tab. The information entered in the preceding section will be displayed as organized by category (Environment, Equipment, Measurement/Measurement Systems, Materials, People/Training, Paperwork/Procedures/Process.




60. To add a cause, click the Add Cause button in the appropriate category. Provide the requested information, check the Root Cause checkbox if appropriate, and click Save Changes.




61. The new cause will appear.

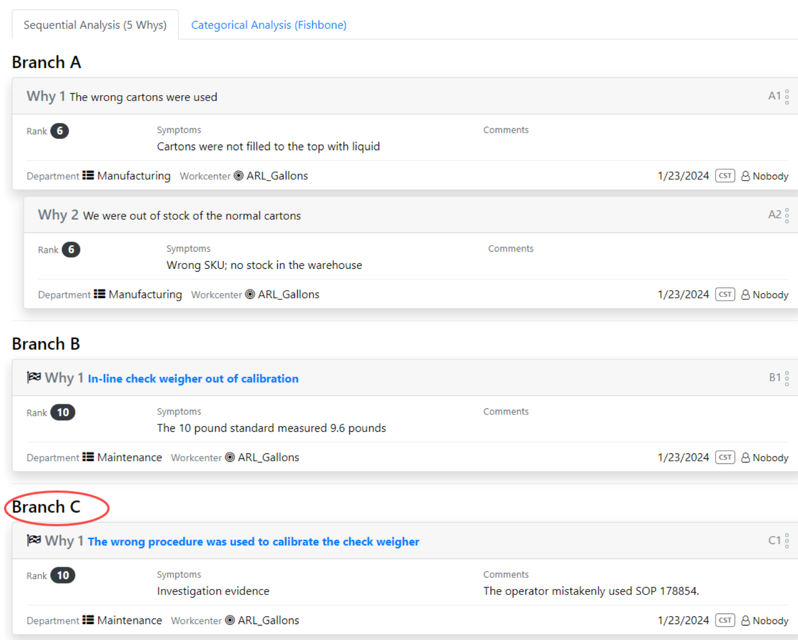



62. Repeat the preceding steps in this section until all the causes are documented in their appropriate

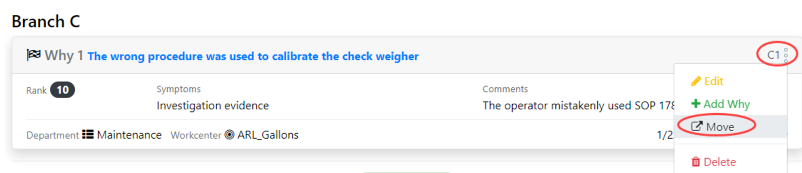
category.

# 5 Whys – Moving Causes/Whys

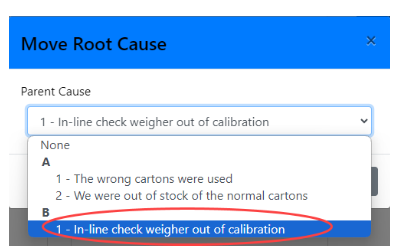
63. Click on the “Sequential Analysis (5 Whys)” tab. Note that the cause added in the preceding section via the Fishbone process appears as a new branch. This is because the Fishbone approach is only concerned with categories, not sequences.



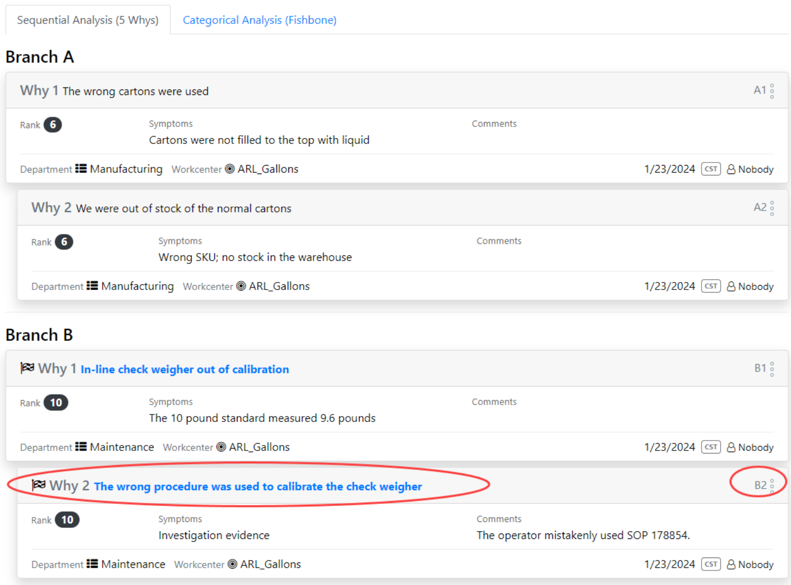

64. The cause added via Fishbone should be Why B2. To move it there, click the Why code and select Move from the submenu.




65. Choose the desired new parent, which in this case is B1.

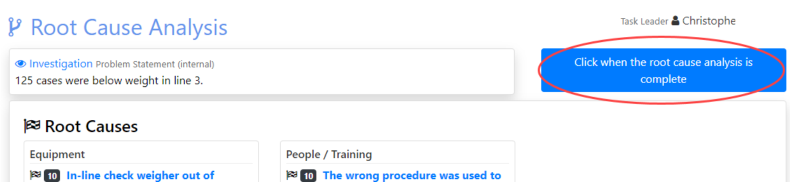



66. Click the Move button. Now the Cause/Why appears in its proper sequential position.




# Completing & Reopening the RCA Task

67. When the RCA task has been completed, click the “Click when the root cause analysis is complete” button.




68. Click the Complete button in the confirmation window.
69. To reopen the RCA task, click the reopen icon.

# Chapter 9: Tasks - Risk Assessment

Contact your quality department for training and guidance on how to conduct a risk assessment. Use the EventPatrol risk assessment page to record the results.

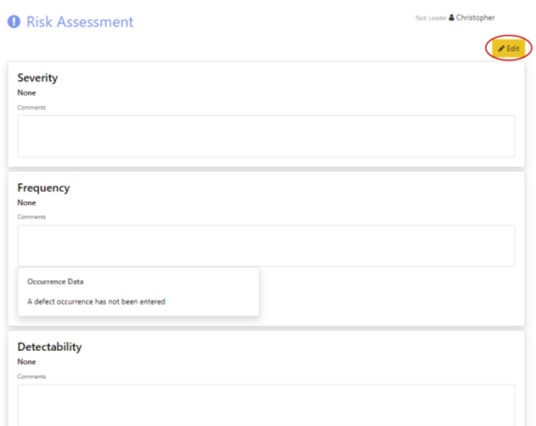
Note: Failing to understand the risks (by completing a risk assessment) before defining and implementing corrective actions is one of the most common indicators of a neglected or immature and quality culture. A risk assessment should *always* be completed *before* defining and implementing corrective actions.

## Assign the Risk Assessment Task

70. Follow the instructions in the preceding chapters to assign this task to a Task Leader.

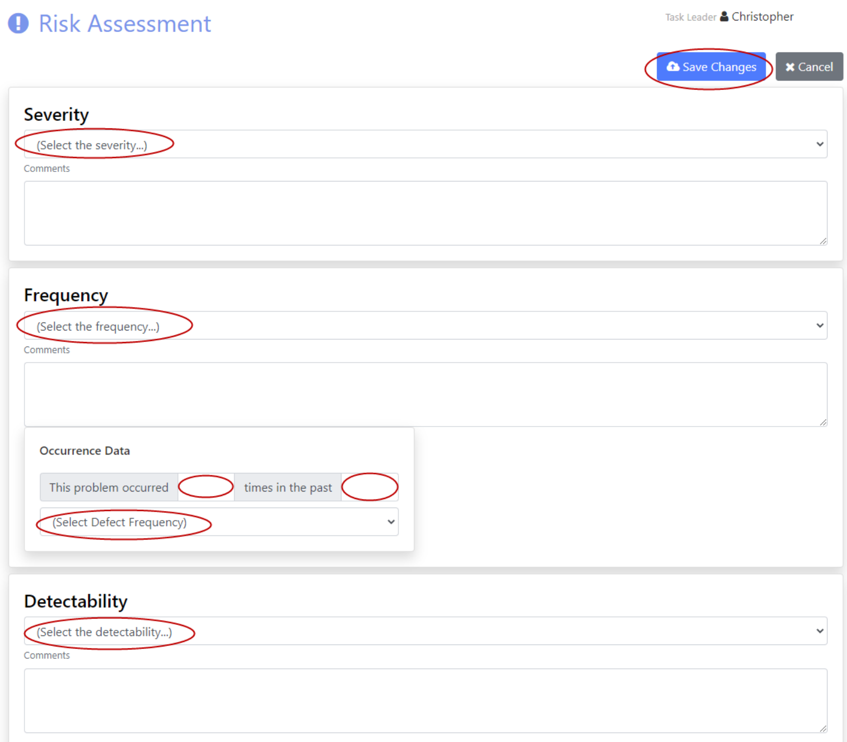
## Perform the Risk Assessment and Record the Results

71. Click on the task name to open the task. Click on the Edit button to record the results.




72. Select the applicable Severity from the dropdown list. Add comments if necessary.
73. Select the applicable Frequency from the dropdown list and record how often this event has happened in the past. Add comments if necessary.
74. Select the applicable Delectability from the dropdown list. Add comments if necessary.
75. Click the Save Changes button.




76. Evaluate the Risk Priority Number (RPN). This provides a numerical index based on the risk assessment to determine if the risk is low, medium, high, or unacceptable. The Event Owner will use this information when considering whether corrective actions are necessary. The RPN scale is as follows. Contact MAP if you would like the scale revised for your organization.

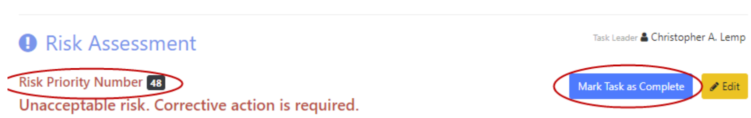
    **0-11 = Low**. Continue to measure and monitor.

    **12-26 = Medium**. Corrective action should be considered.

    **27-47 = High**. Corrective action is recommended.

    **>48 = Unacceptable**. Corrective action is required and preventive actions should be considered.

77. Click the Mark Task Complete once the risk assessment is finished and recorded.



# Chapter 10: Tasks with Actions - Overview

## Introduction

78. The following types of Tasks with Actions can be assigned:

    a. **Containment**. Immediate actions taken to prevent the problem, its impact, or associated financial liability from worsening. Because containment often requires a rapid response, these actions may be implemented before review or approval by an extended cross-functional team.

    b. **Safety**. Actions taken to address immediate human, food, or product safety concerns and reduce the risk of harm. Because safety issues may require an urgent response, these actions may be implemented before review or approval by an extended cross-functional team.

    c. **Correction**. “Correction actions eliminate a detected nonconformity. For example, rework or regrading a product is a correction action.” Source: FDA.gov CDRH & ISO 9000:2005(E). There is an important difference between correction and corrective actions: A **correction** addresses the nonconformity itself, whereas a **corrective action** addresses its cause to prevent recurrence.

    d. **Corrective**. “Action taken to eliminate the **root cause** of a detected nonconformity or other undesirable situation (to prevent its recurrence)." Source: FDA.gov CDRH & ISO 9000:2005(E). Corrective action is reactive and is **preceded by Root Cause Analysis** to identify the cause that must be addressed.

    e. **Preventive**. “Action to eliminate the cause of a potential non-conformity or other undesirable situation. Preventive action is taken to prevent occurrence.” Source: FDA.gov CDRH & ISO 9000:2005(E). Preventive action is a proactive activity that is often **preceded by Risk Assessment** to identify, assess, and control potential problems before they occur.

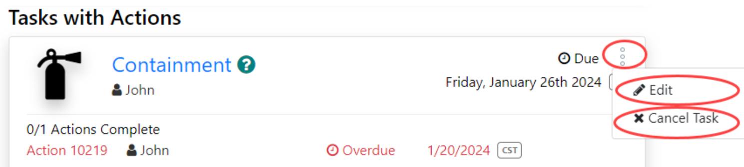
    f. **Effectiveness Verification**. Follow-up action taken to confirm that implemented corrective and preventive actions are effective in achieving their intended results and do not adversely affect the finished product.

## Assign the remaining Tasks to a Task Leader

79. The Event Owner must follow the instructions in the preceding chapters to assign any remaining desired Tasks, including Tasks with Actions, to a Task Leader.

# Editing Existing Task Assignments

80. Click on the ellipses and click on Edit to change the Task Leader or the due date.
    a. Click on Cancel Task to un-assign the task.

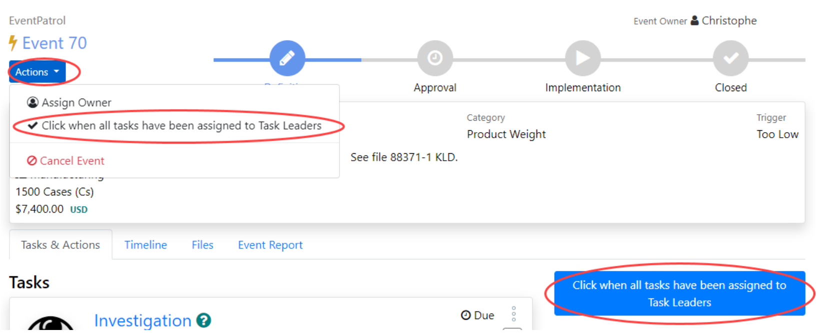



# All Tasks Assigned

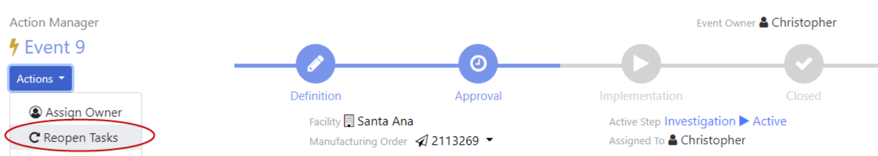
The Event Owner must indicate when all desired tasks have been assigned to a Task Leader. The approval process cannot start until all tasks are marked as being assigned.

81. Click on the Actions button in the event header. Click on the All Tasks Assigned menu option.

    Alternatively, the Event Owner can click on the “Click when all tasks and




82. To reopen task assignment, click on the Reopen Tasks menu option.



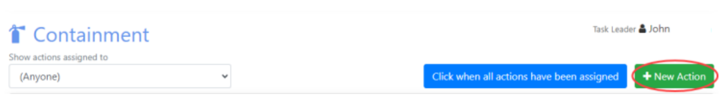
# Chapter 11: Tasks with Actions - Defining & Assigning Actions

Contact your quality department for training and guidance on how to determine the actions to take as a result of the investigation, root cause analysis, and risk assessment.

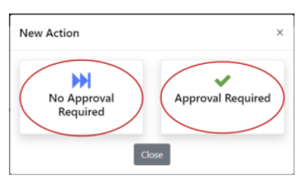
This chapter applies to all Tasks with Actions, as the management of each action is identical.

## Defining and Assigning New Actions

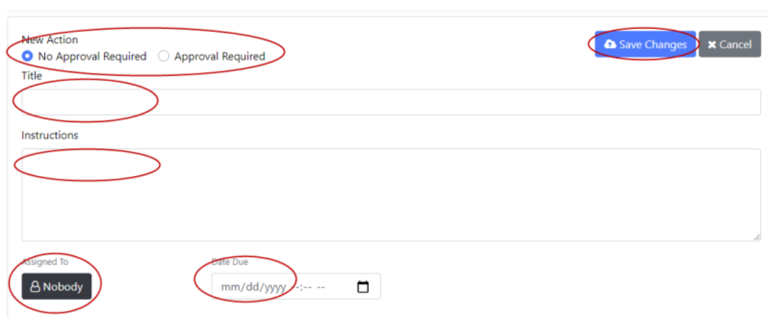
83. To create a new action, click the New Action button.



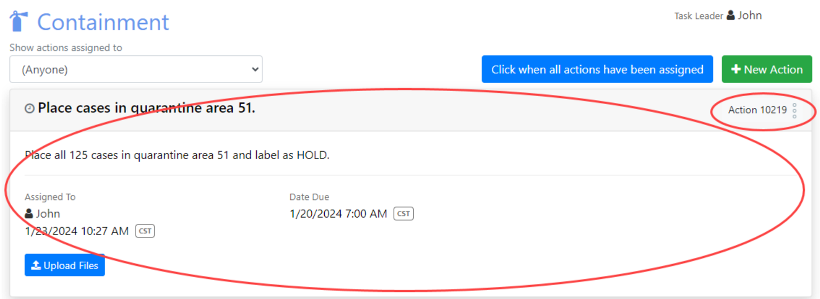

84. Actions can be completed immediately or after approval. Click “No Approval Required” for actions that need to be completed immediately without approval. Click “Approval Required” for actions that should be approved before being completed.




85. Enter the action title, instructions, and due date. Choose the user to whom the action is assigned (the “action responsible person” or “ARP”). Click the Save Changes button.



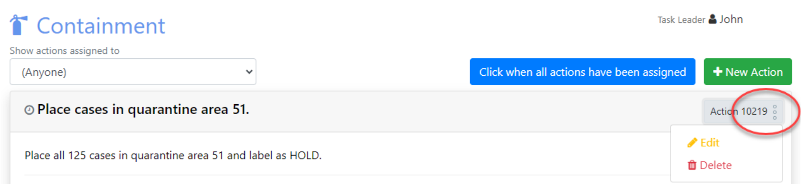
The new action will appear in the action list. Each action is given a unique Action Number for reference.




86. To filter the action list by user, choose the desired user from the “Show Actions assigned to” dropdown.


# Editing Existing Actions

87. To edit or delete an action, click on the ellipses, then click Edit or Delete from the dropdown menu.

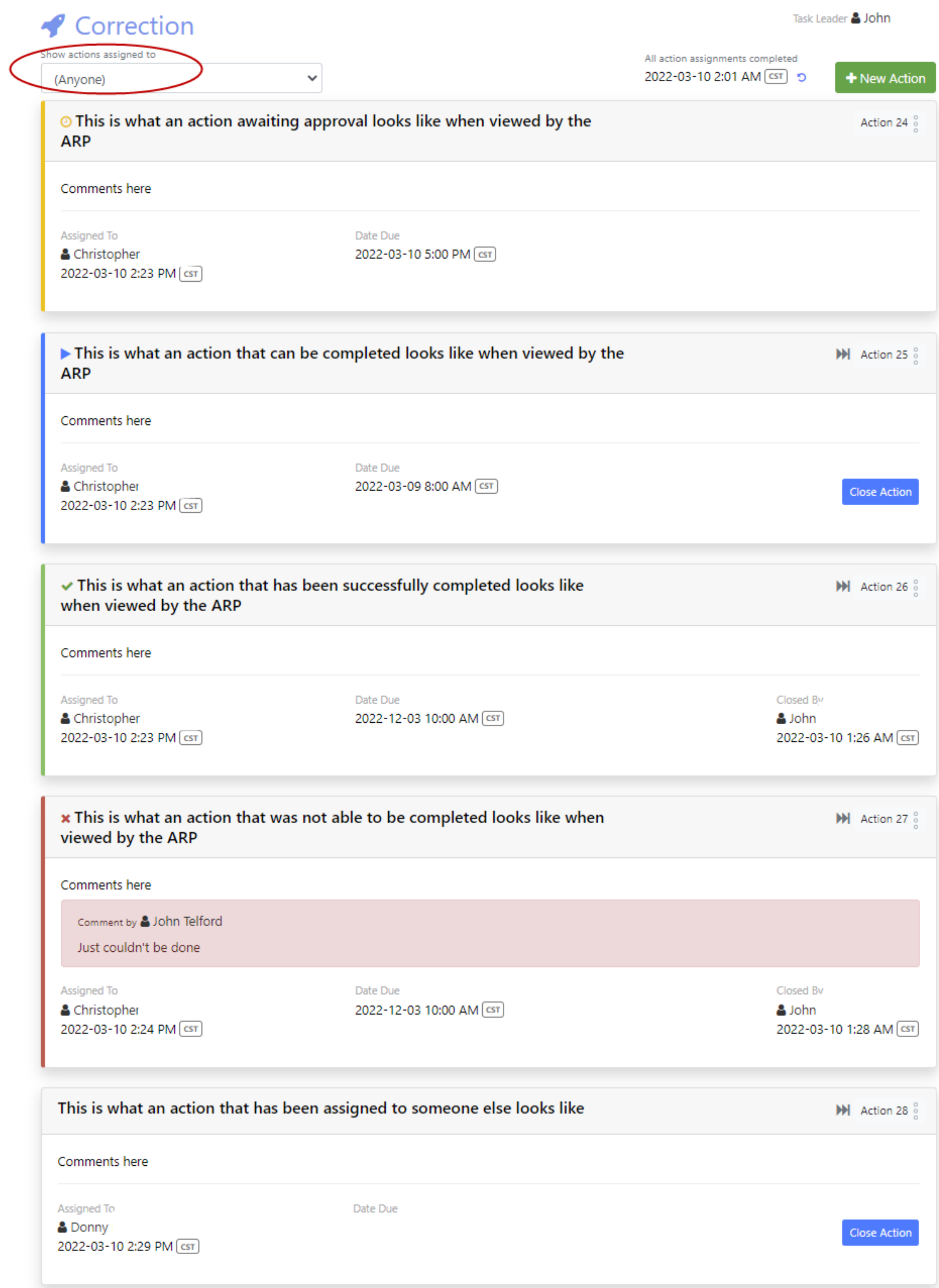



# Viewing Actions

The action page is color-coded to help identify the actions assigned to the user viewing the page. Each action has a colored bar on the left of the card with the following meanings:

| | |
|---|---|
| **No Color** | The action is not assigned to you. |
| **Yellow** | The action is assigned to you, but it cannot be started until it is approved. |
| **Blue** | The action is assigned to you, and it can be started immediately (no approval necessary). |
| **Green** | The action is assigned to you, and it has been completed successfully. |
| **Red** | The action is assigned to you, and it has been completed unsuccessfully. |

88. Click the Show actions assigned to filter and select the desired ARP to view actions for the selected user.



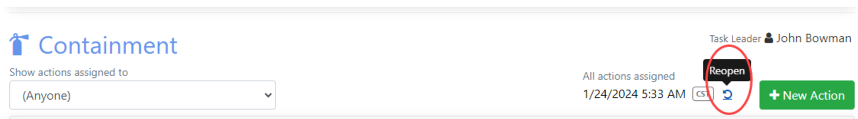
Correction
Task Leader John
Show actions assigned to
(Anyone)
All action assignments completed
2022-03-10 2:01 AM CST
New Action
This is what an action awaiting approval looks like when viewed by the ARP
Action 24
Comments here
Assigned To
Christopher
2022-03-10 2:23 PM CST
Date Due
2022-03-10 5:00 PM CST
This is what an action that can be completed looks like when viewed by the ARP
Action 25
Comments here
Assigned To
Christopher
2022-03-10 2:23 PM CST
Date Due
2022-03-09 8:00 AM CST
Close Action
This is what an action that has been successfully completed looks like when viewed by the ARP
Action 26
Comments here
Assigned To
Christopher
2022-03-10 2:23 PM CST
Date Due
2022-12-03 10:00 AM CST
Closed By
John
2022-03-10 1:26 AM CST
This is what an action that was not able to be completed looks like when viewed by the ARP
Action 27
Comments here
Comment by John Telford
Just couldn't be done
Assigned To
Christopher
2022-03-10 2:24 PM CST
Date Due
2022-12-03 10:00 AM CST
Closed By
John
2022-03-10 1:28 AM CST
This is what an action that has been assigned to someone else looks like
Action 28
Comments here
Assigned To
Donny
2022-03-10 2:29 PM CST
Date Due
Close Action

# All Actions Assigned

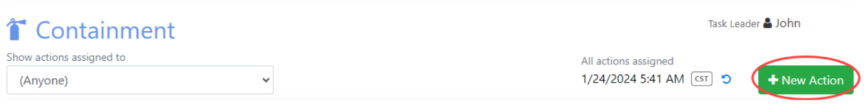
The Task Leader must indicate when all desired actions have been assigned to action responsible persons (ARPs). Event approval cannot start until all Task Leaders have indicated that all actions requiring approval have been assigned. If, after approval, a Task Leader adds a new action that requires approval, then a new approval route will be required before the new action can be completed.

89. Once the Task Leader has finished defining and assigning actions, click on the “Click when all actions have been assigned” button.


90. To reopen a completed task, click on the Reopen icon.




91. After all actions have been assigned, the Task Leader can add a new action without first reopening the task. Click on the New Action button, click No Approval Required, provide the title, instructions, ARP, due date, and click Save Changes. This will add the new action and the task will automatically be reopened.

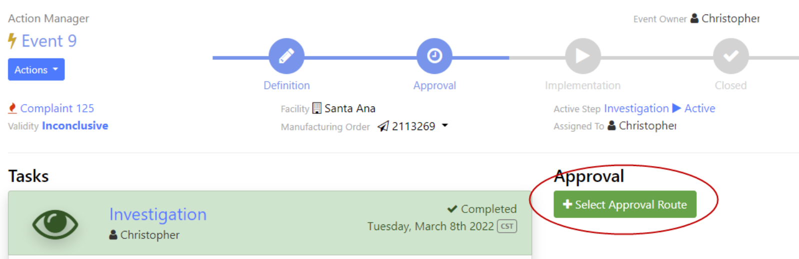


# Chapter 12: Tasks with Actions - Approval

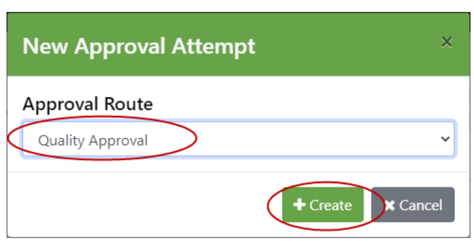
If all desired tasks have been assigned to task leaders, and all the task leaders indicated that they are done assigning actions, then the Event Owner can start the approval route.

## Selecting the Approval Route

92. Click on the Select Approval Route button.

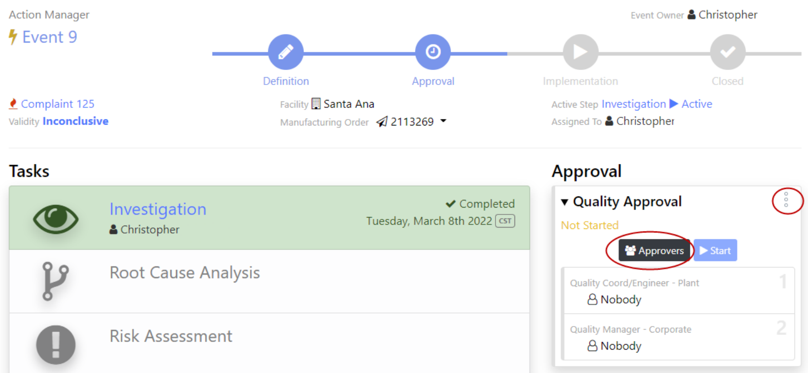



93. Choose the desired approval route and click the Create button.

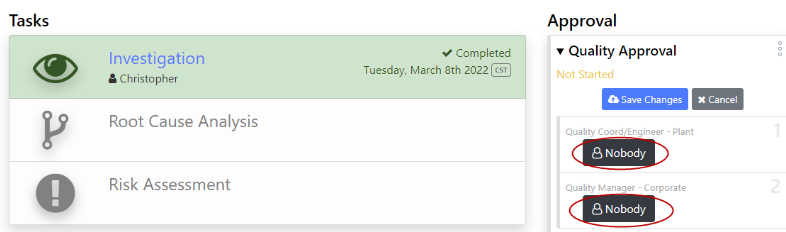



## Starting the Approval Route

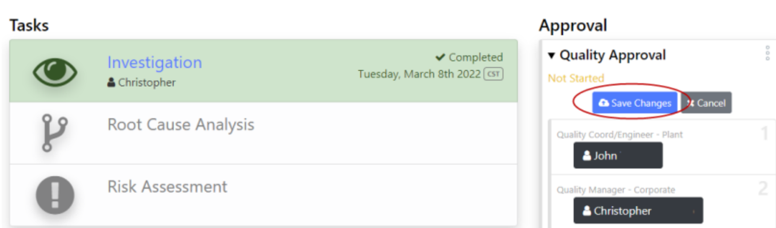
94. To choose the people who will act as approvers in each role, click on the Approvers button.



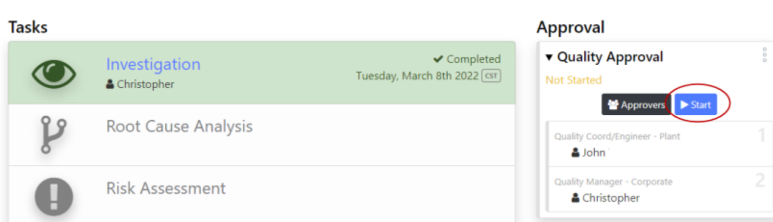

95. For the desired role, click on the assigned user badge, which will be “Nobody” if a user has not been previously chosen to act in a role.




96. Select the desired user from the Select a User search. Note that the selectable users will be limited to those people who have been added into the corresponding role via the Admin/Approval Roles page (see the PatrolSuite user guide for more information).
97. After an approver has been chosen for each role, click the Save Changes button.



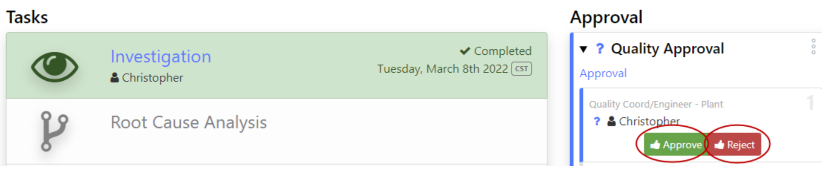

98. Click the Start button to start the approval route.



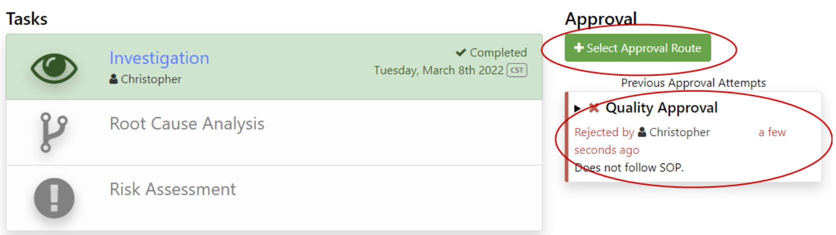
# Approval or Rejection

Each user in the approval route will receive a task request when it is his/her time to approve.

99. Click Approve or Reject to reflect the decision of the user in the approval role. If Reject is selected, a reason for rejection is required.



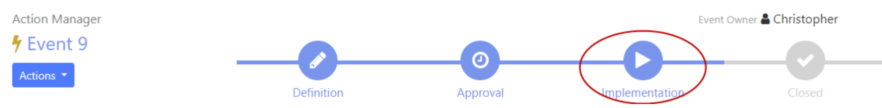

100. Previous approval attempts will be displayed for reference. After making any necessary changes, another approval attempt can be started.



# Chapter 13: Tasks with Actions - Implementation & Closure

## Implementation Phase

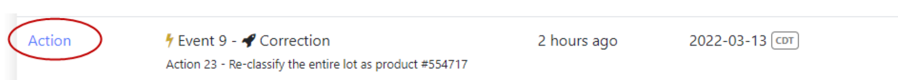
101. Once the approval route is approved, the action event state will change to Implementation, and all ARPs assigned to complete an action will receive a task notice.



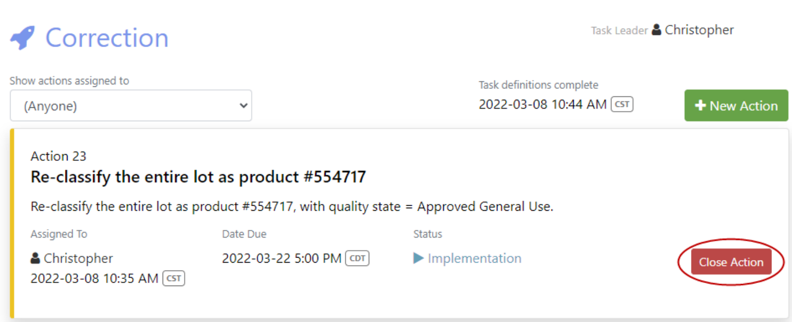

## Action Completion by ARPs

102. From the PatrolSuite homepage, click on My Tasks.

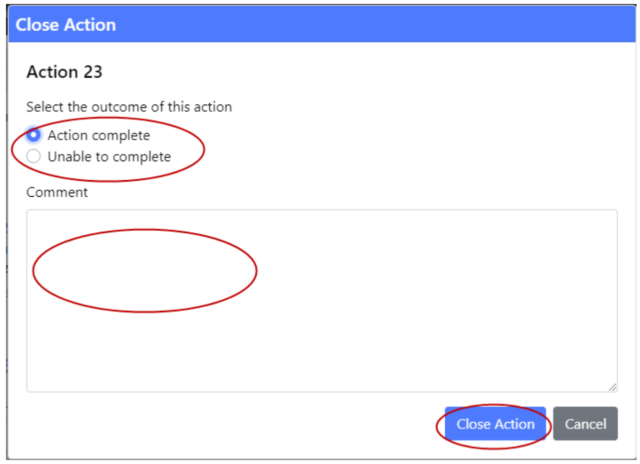

103. From the My Tasks page, click on the desired task.




104. Once the action is complete, click on the Close Action button.



105. Select the action outcome, add any comments, and click the Close Action button.




106. Once all actions are completed, the event state will automatically change to Closed.

# NEW Chapter 14: Timeline

## NEW View Event Timeline

107. To view the event timeline, click on the “Timeline” tab. The timeline provides a detailed accounting of the event tasks including the: task name, start date, due date, completion date, completion status, completed by, and duration.

Tasks & Actions | Timeline | Files | 8D Report | Event Summary | Management Review

| Name | Started | Due | Completed | Completed By | Duration |
|---|---|---|---|---|---|
| Initiated | | | 22-January-2024 08:06 AM CST | John Wick | |
| Containment | 22-January-2024 08:06 AM CST | 2024-01-26 CST | 15-January-2025 15:12 PM CST<br>Late 354 days 21 hours | Chris Lloyd | 359 days 7 hours |
| Investigation | 23-January-2024 10:24 AM CST | 2024-02-01 CST | Overdue 818 days 12 hours | | |
| Root Cause Analysis | 23-January-2024 13:12 PM CST | 2024-02-01 CST | 03-September-2024 14:57 PM CDT<br>Late 214 days 19 hours | John Wick | 224 days |
| Risk Assessment | 12-February-2024 12:11 PM CST | 2024-02-21 CST | 29-April-2026 12:11 PM CDT<br>Late 797 days 17 hours | Chris Lloyd | 806 days 22 hours |
| Safety | 13-February-2024 09:19 AM CST | 2024-02-17 CST | 29-April-2026 12:10 PM CDT<br>Late 801 days 17 hours | Chris Lloyd | 806 days 1 hour |
| Corrective | 31-January-2024 06:17 AM CST | 2024-02-09 CST | 15-January-2025 15:00 PM CST<br>Late 340 days 21 hours | Chris Lloyd | 350 days 8 hours |
| Preventive | 31-January-2024 06:24 AM CST | 2024-02-09 CST | 29-April-2026 12:10 PM CDT<br>Late 809 days 17 hours | Chris Lloyd | 819 days 4 hours |
| | | | | Total | 4193 days 17 hours |

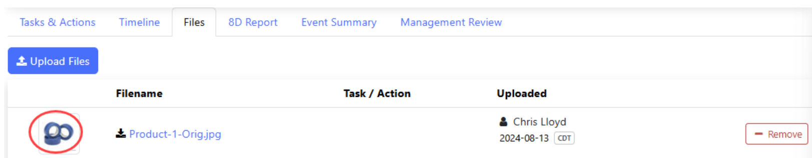
  

# Chapter 15: Files

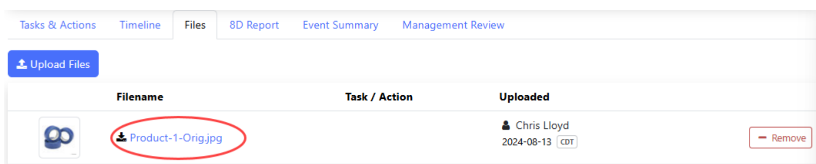
## View & Manage Event Files

The Files tab allows any user involved in the event to upload files related to the event. Additionally, users with permission to view the event will also be able to view the files.

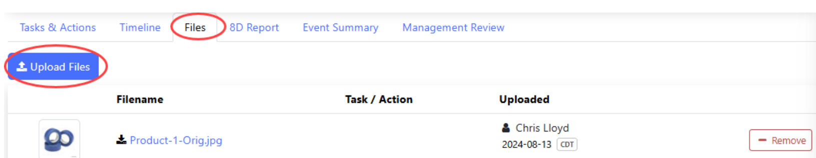
108. To view a file, click on the thumbnail.



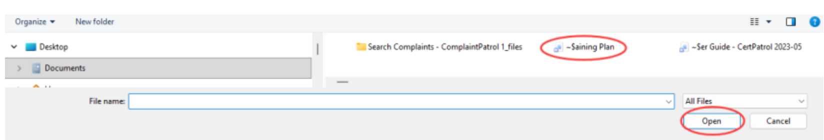

109. To download a file, click on the filename hyperlink.



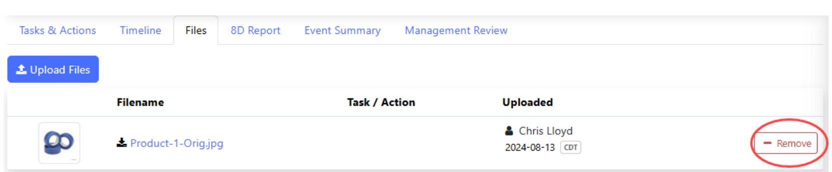

110. To upload a file related to the event, click on the “Files” tab and then click on the ‘Upload Files’ button.




a. Choose the file and click the ‘Open’ button.




111. To remove a file, click the ‘Remove’ button. Click on the ‘Delete’ button in the confirmation window.



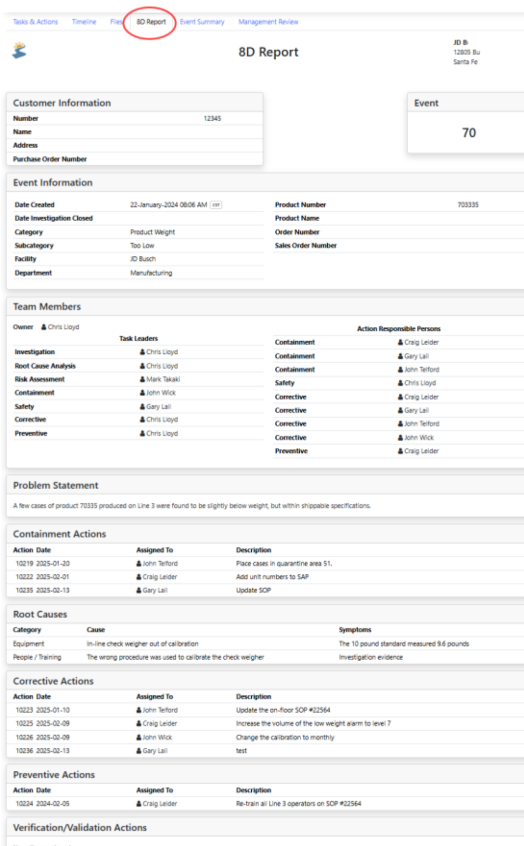
# NEW Chapter 16: 8D Report

## NEW Introduction

The 8-Discipline approach is a structured, team-oriented problem-solving methodology used to identify, correct, and prevent the recurrence of quality issues. Originally developed by Ford Motor Company, this 8-step approach (D1-D8) is global standard in manufacturing for identifying root causes, implementing permanent corrective actions, and enhancing product quality. This report is based on the 8D structure and is often provided to customers in response to a customer complaint.

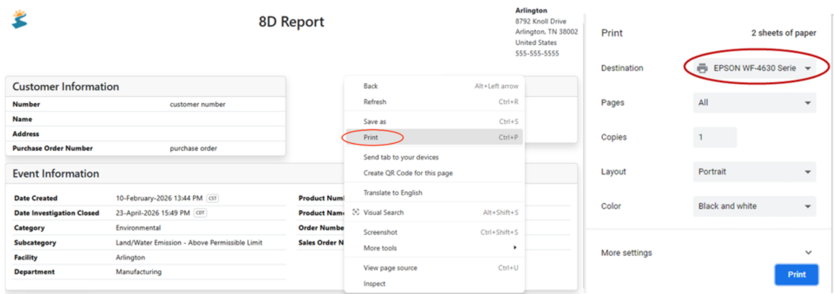
## NEW View Report

112. To view the event's 8D Report, click on the "8D Report" tab.



# NEW Print Report

113. To print the 8D Report, right click on the report and select “Print,” select the desired printer, and click on the ‘Print’ button.



# Chapter 17: Event Summary

## Introduction

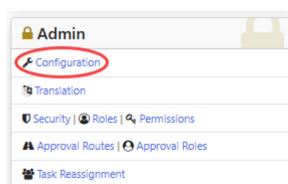
The Event Summary tab contains the written report summarizing the *entire* event from initiation, investigation, root cause analysis, risk assessment, and the tasks with actions (containment, correction, corrective, preventive, validation, etc.).

## Configuration

A configuration setting enables the Event Summary to be added as the last section of the 8D Report and the Management Review Report.

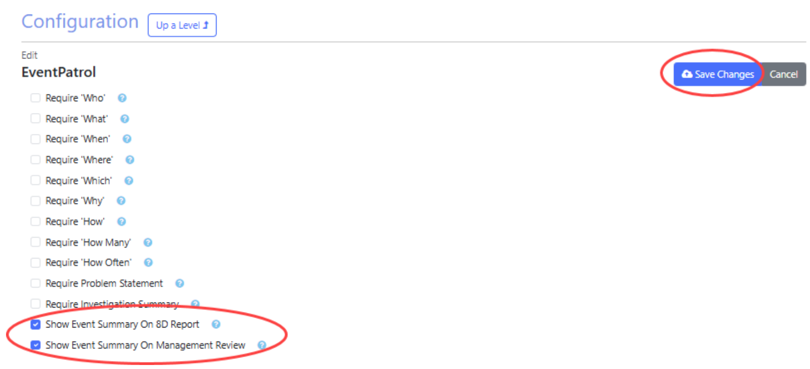
Note: While displaying the event summary on these reports is possible, use this feature with caution as it will likely result in adding a significant amount of duplicate information that is already on the reports.

114. To add the Event Summary as the last section of the 8D Report or the Management Review Report, click on the Configuration hyperlink in the Admin card of the PatrolSuite homepage.



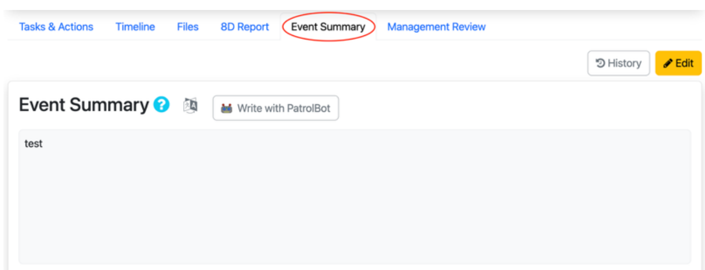

   a. Click on the “EventPatrol” ‘Edit’ button.


   b. Check the “Show Event Summary On 8D Report” or “Show Event Summary On Management Review” checkboxes as desired and click the ‘Save Changes’ button.

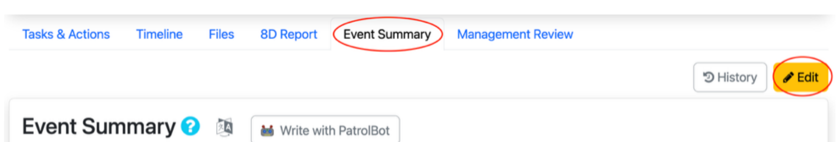



# NEW Event Summary Report

115. To view the event summary report, click on the “Event Summary” tab.

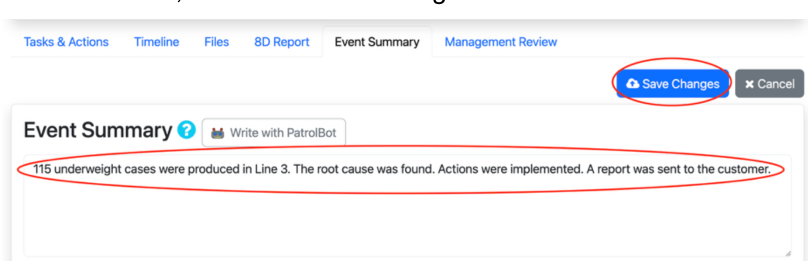



116. To draft a written summary of the entire event, click on the “Event Summary” tab and click the ‘Edit’ button.

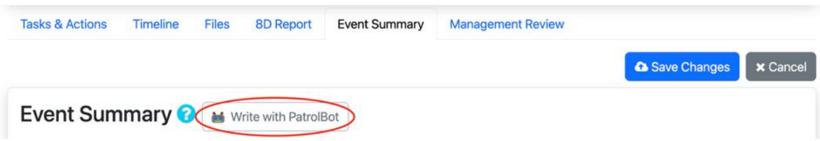



There are two options for writing the Event Summary:

a. **Write with Keyboard.** Click into the investigation summary cell and use your keyboard to type the summary. When finished, click the ‘Save Changes’ button.

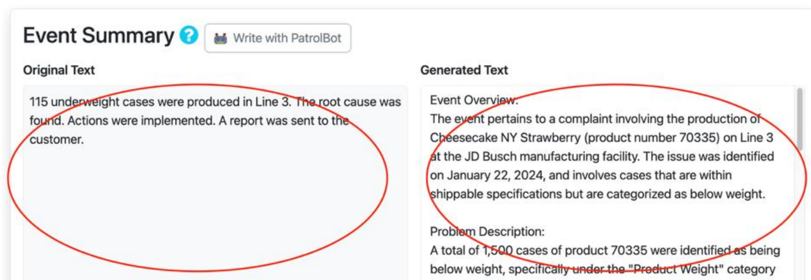


b. **Write with PatrolBot**. Click on the ‘Write with PatrolBot’ button and let artificial intelligence write the summary.



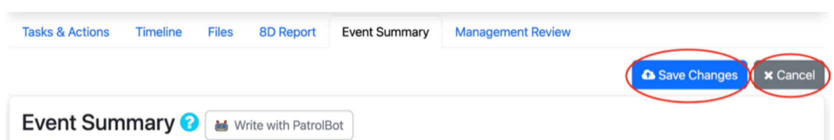

Note: The event summary will be created based in the information contained in the event meta data (which may originate from AuditPatrol or ComplaintPatrol, if applicable), the Investigation, Root Cause Analysis, and Risk Assessment tasks, the Tasks with Actions, and any existing Event Summary information.

Note: If an investigation summary already exists, then both the Original Text and the suggested AI Generated Text will be presented side by side.

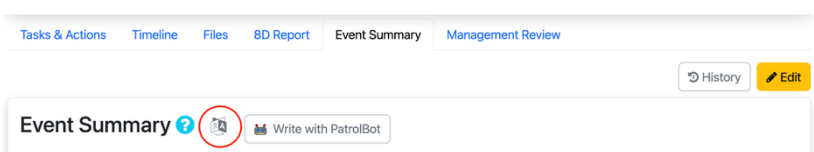



i. To accept the AI Generated event summary, click on the ‘Save Changes’ button.

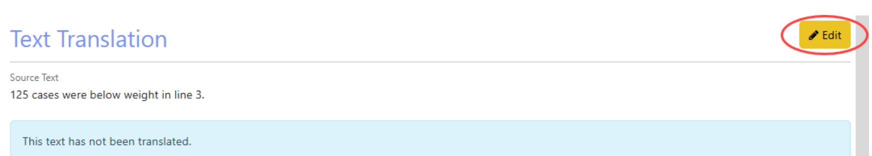
ii. To retain the Original Text (and disregard the AI Generated event summary), click on the ‘Cancel’ button.



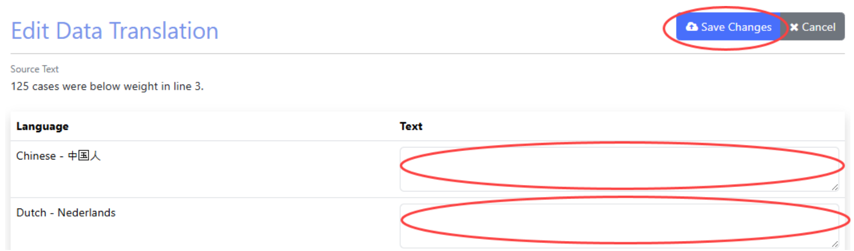

117. To translate the event summary into required languages, click on the localization icon.




a. Click the ‘Edit’ button.

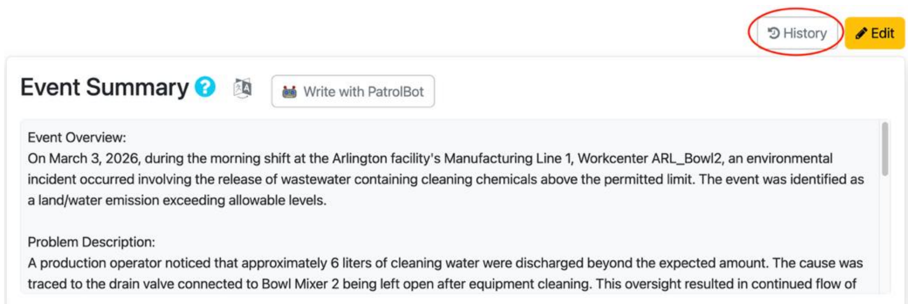



b. Enter the localized text and click the ‘Save Changes’ button.




# NEW Event Summary History

118. To view an audit trail of changes to the event summary, click the ‘History’ button.



# Chapter 18: Management Review

## Introduction

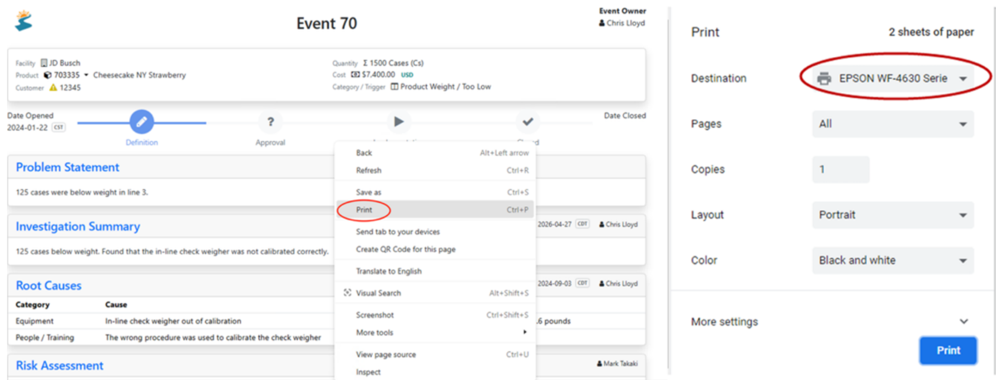
The Management Review tab displays the event information and summary statistics in a format designed to facilitate Management Review. The intended audience of this report is supervisors and managers who need more information than is provided in the 8D Report.

## View Report

119. To view the Management Review report, click on the “Management Review” tab.

# NEW Print Report

120. To print the Management Review report, right click on the page and select "Print," select the desired printer, and click on the 'Print' button.



# Chapter 19: Dashboard

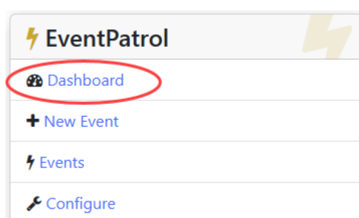
## Security

Users in a PatrolSuite role with the following permissions will have access to view the EventPatrol Dashboard.

| EventPatrol | | |
|---|---|---|
| No | Add Action | Allows users to re-open a closed action task, to add new actions, and to close an action task. |
| No | Admin | Allows users to edit the configuration settings and all events, including changing the event owner |
| No | Create | Allows users to create events that originate from EventPatrol. |
| Yes | Dashboard | Allows users to view the EventPatrol dashboard. |
| No | View | Allows users to view all events. |

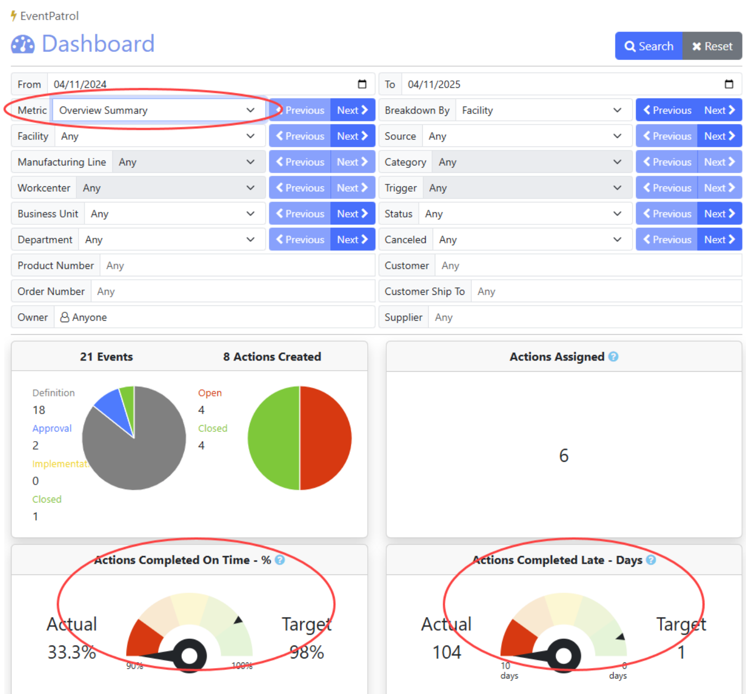
## Dashboard Metrics & Filtering

121. From the PatrolSuite homepage, click the Dashboard hyperlink in the EventPatrol card.

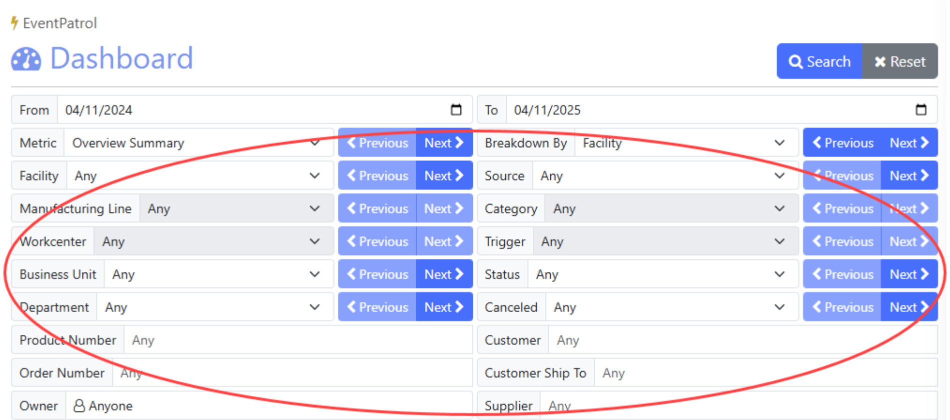



122. By default, the EventPatrol dashboard summary page is displayed. This page provides an overview of popular metrics. To view a specific complaint metric, select a desired metric, or click on the header of the desired metric card. Page: {PatrolSuite URL}/Event/Dashboard

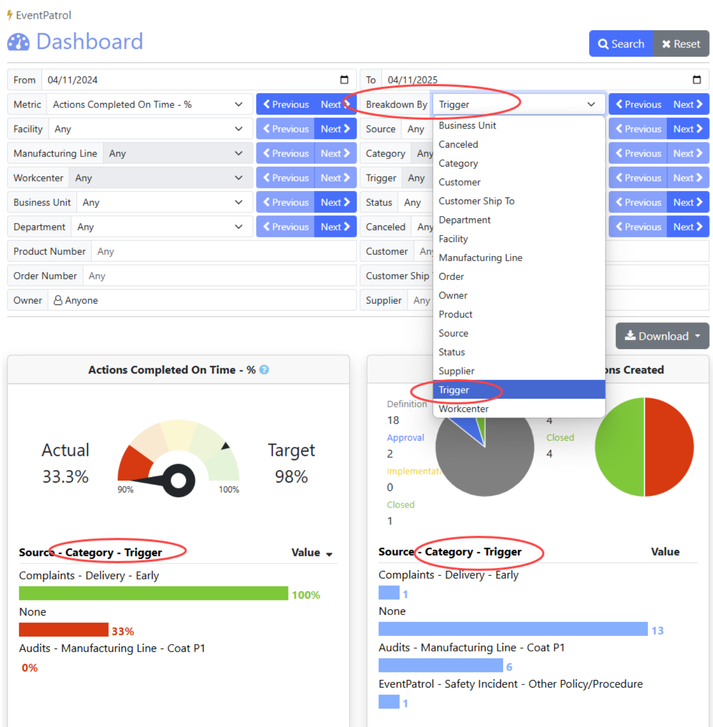
  



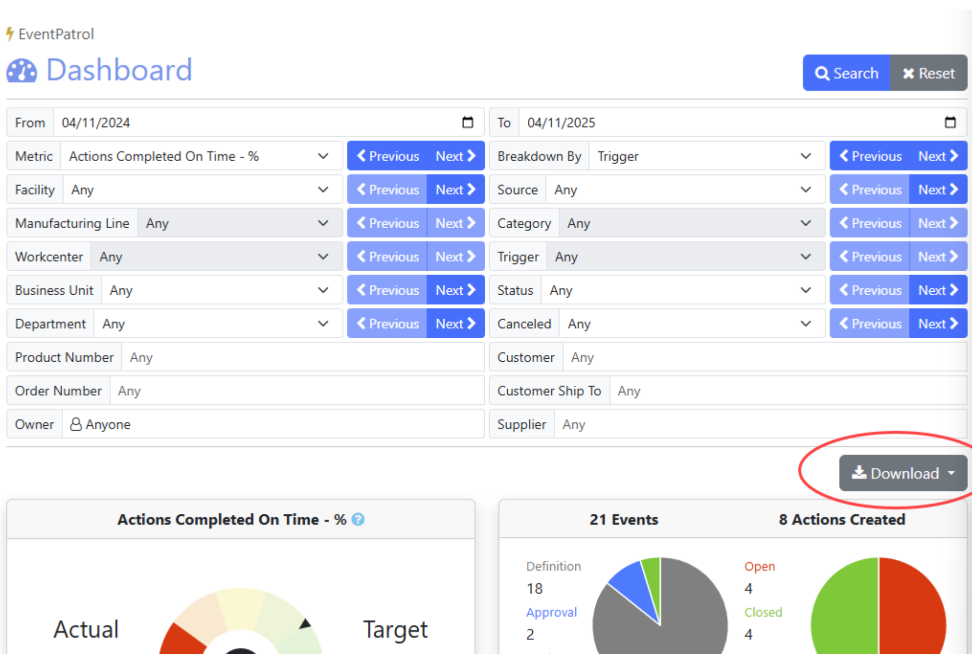

123. To filter the data, select the desired filters.



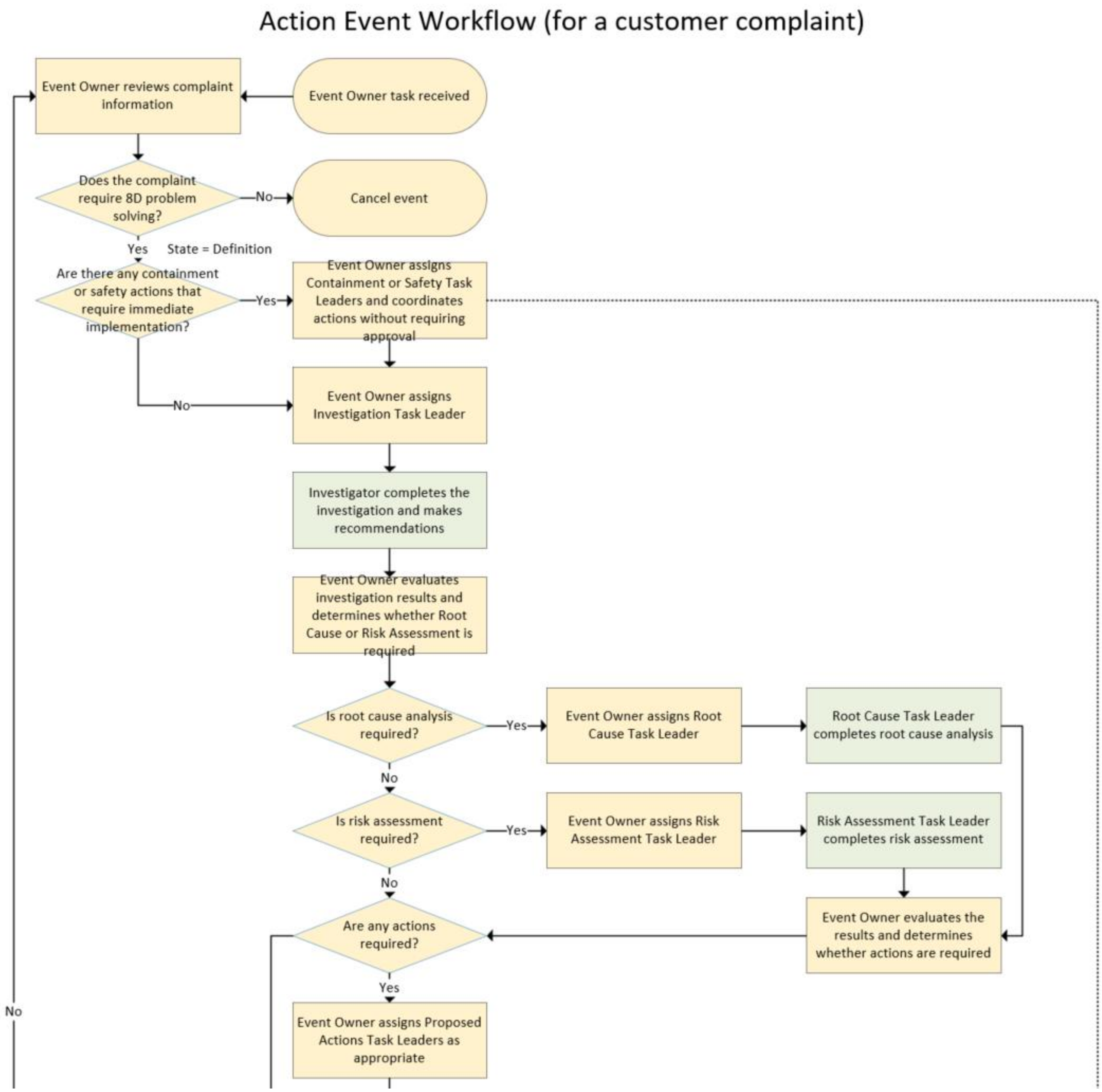

124. To breakdown a metric by desired criteria, choose a metric and select the desired breakdown variable.

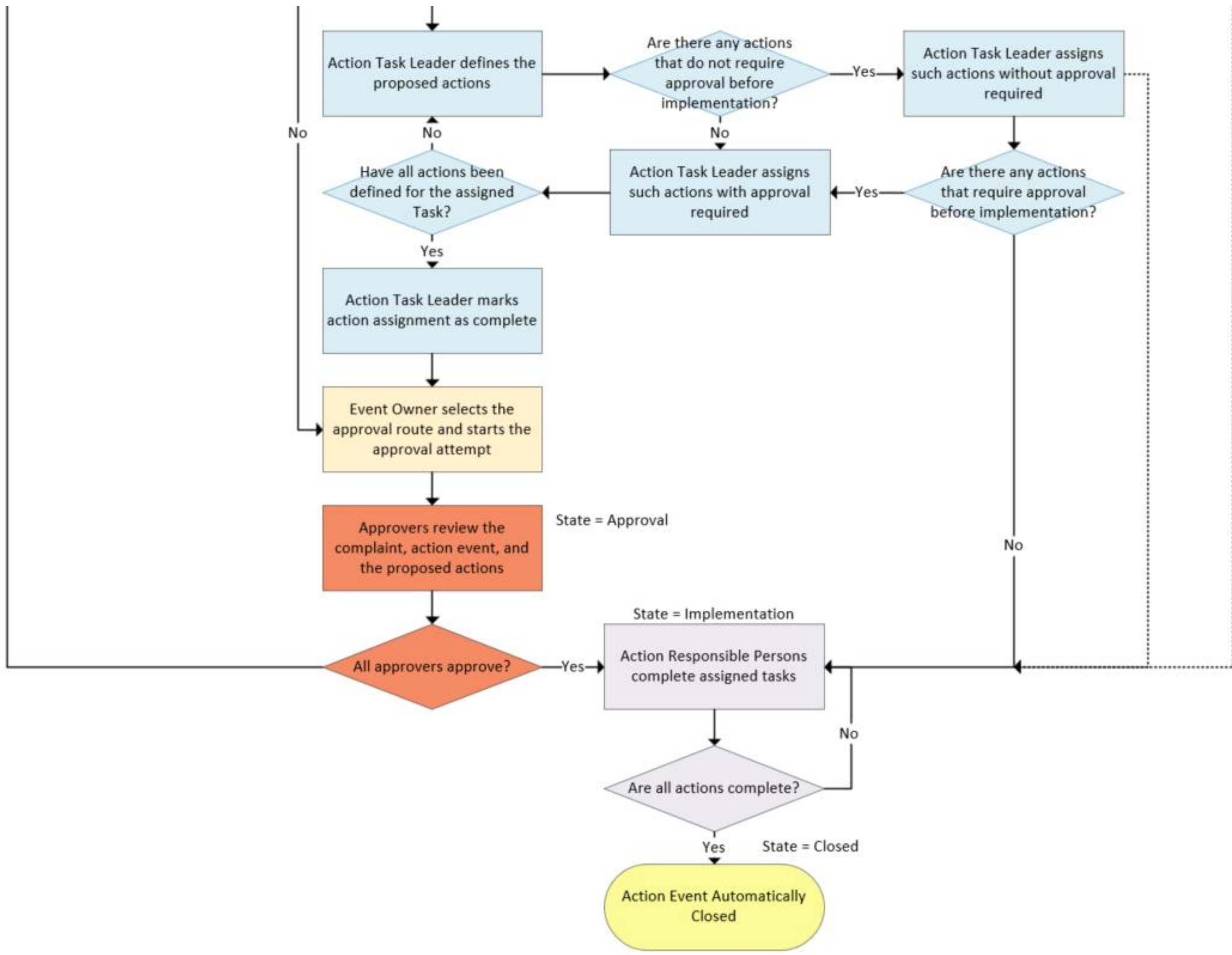



125. To download the data contained in the information grid, select a desired metric, click on the ‘Download’ button, and select the desired output format.



# Exhibit A: Event Workflow





Action Task Leader defines the proposed actions
Are there any actions that do not require approval before implementation?
Yes
Action Task Leader assigns such actions without approval required
No
No
No
Have all actions been defined for the assigned Task?
Action Task Leader assigns such actions with approval required
Yes
Are there any actions that require approval before implementation?
Yes
Action Task Leader marks action assignment as complete
Event Owner selects the approval route and starts the approval attempt
Approvers review the complaint, action event, and the proposed actions
State = Approval
No
State = Implementation
All approvers approve?
Yes
Action Responsible Persons complete assigned tasks
No
Are all actions complete?
Yes
State = Closed
Action Event Automatically Closed