



EventPatrol

Events

Enter customer, product, or order number.

Search

Reset

My Events

Source Any

Facility Any

User Anyone

Department Any

Status Any

Category Any

Manufacturing Line Any

Canceled Not Canceled

Subcategory/Trigger Any

Workcenter Any

1234

Download

Event	Source	Category	Subcategory/Trigger
Next Due	Value		
100	new event	Labeling	
2026-03-06 CST			
99	VVW's test	Environmental	
	\$999.00 USD	Land/Water Emission ~...	
98	Tyler's Event	Foreign Material	
2026-02-10 CST			
97	test	Environmental	
2025-10-04 CDT			
95	92 4.1.1 Verify that...	ISO	
		9001	
92	Test	Safety Incident	
2025-09-28 CDT		Other Policy/Procedure	
90	Test	Environmental	
2024-12-21 CST			
89	Test	Environmental	
85	Complaint 197		
	R\$36.00 BRL		

EventPatrol

Dashboard

New Event

Events

Configure

Event Owner John Wick

Definition

Approval

Implementation

Closed

Audit 33

Ended

Lead Auditor

Lead Auditee

Topic

Facility

Manufacturing Line

ISO 9001:2015

John Wick

Chris Lloyd

Quality Management

Brunswick

Coat P1

4.1 Understanding the Organization and its Context

4.1.1 Verify that the organization has determined external and internal issues relevant to its purpose and strategic direction.

Meets Requirements

Chris Lloyd

Score 10. Follows best practices

Tasks & Actions

Timeline

Files

8D Report

Event Summary

Management Review

Tasks

Investigation

John Wick

Wednesday, October 2nd 2024

Complete

Root Cause Analysis

John Wick

Wednesday, October 2nd 2024

Complete

Risk Assessment

John Wick

Wednesday, October 2nd 2024

Complete

Tasks with Actions

Assign Task

Actions Completed On Time - %

Actual 30.4%

Target 98%

Source - Category - Trigger

Complaints - Delivery - Early

EventPatrol - Quality Control - Erroneous Test Result

EventPatrol - Calibration - Failed

Value

100%

67%

40%

65 Events

26 Actions Created

Definition

Approval

Implementation

Closed

Open

Closed

Source - Category - Trigger

Complaints - Delivery - Early

EventPatrol - Quality Control - Erroneous Test Result

EventPatrol - Calibration - Failed

Value

2

1

21



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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.

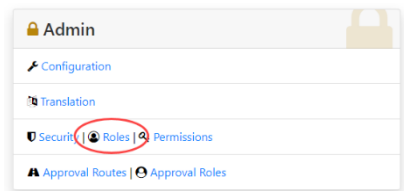
Typeface	Description
	Indicates a “required” data entry field within a UI.
	Indicates a new feature, or new information regarding existing functionality.
	Indicates rules regarding access security.
	Click the help icon to view additional information.

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.





Security / Roles			
All			
Roles			
+ Add New Role			
Name	Active Directory Group	Permissions	
EventPatrol Dashboard		1	Active
EventPatrol Manager		4	Active
EventPatrol User		2	Active
EventPatrol Viewer		1	Active

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.



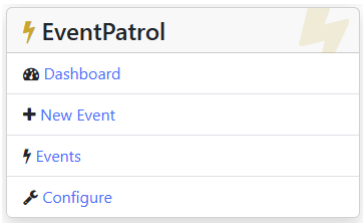
Chapter 2: Navigation

 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

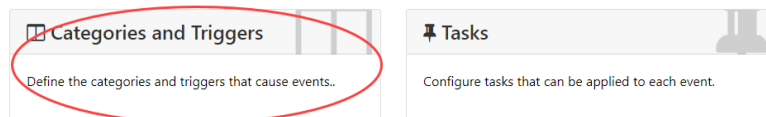
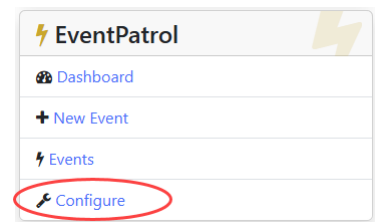
 Users with the following permission can view and edit the EventPatrol/Configure pages.

 Yes	Admin	Allows users to edit the configuration settings and all events, including changing the event owner
---	-------	--

Categories

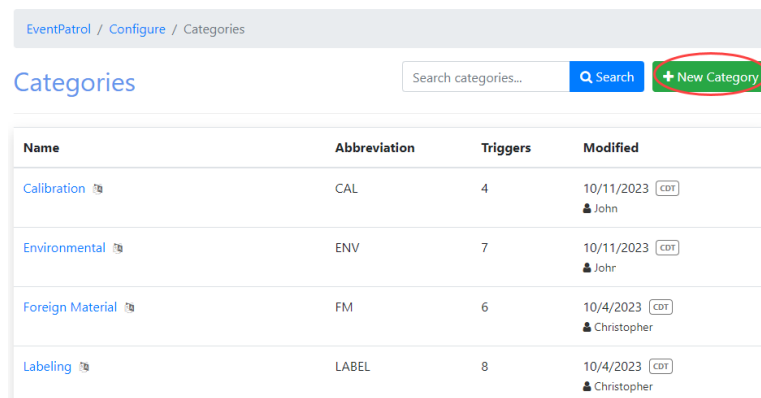
- Click on the “Configure” hyperlink in the EventPatrol card on the PatrolSuite homepage.
- Click on the Categories and Triggers card.

EventPatrol
[Configure](#)



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

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



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



EventPatrol / Configure / Categories / New Category

New Category ☒ Active

Name

Abbreviation

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

EventPatrol / Configure / Categories

Categories

Name	Abbreviation	Triggers	Modified
Calibration	CAL	4	10/11/2023 CDT John I
Environmental	ENV	7	10/11/2023 CDT John I

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

EventPatrol / Configure / Categories

Categories

Name	Abbreviation	Triggers	Modified
Calibration	CAL	4	10/11/2023 CDT John I
Environmental	ENV	7	10/11/2023 CDT John I

a. Click the Edit button.

EventPatrol / Configure / Categories / Calibration / Caliper

Calibration

Caliper

Abbreviation

+ Created Christopher 7/5/2023 3:48 PM

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

EventPatrol / Configure / Categories / Calibration / Caliper

Calibration

Caliper ☒ Active

Name

Abbreviation

+ Created Christopher 7/5/2023 3:48 PM

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.

EventPatrol / Configure / Categories

Categories

Name	Abbreviation	Triggers	Modified
Calibration	CAL	4	10/11/2023 John I
Environmental	ENV	7	10/11/2023 John I

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

Triggers

Name	Abbreviation	Modified
Failed	CAL-FAIL	10/10/2023 John
Not Calibrated	CAL-NOT	10/9/2023 Christopher

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

EventPatrol / Configure / Categories / Calibration /

New Subcategory ☒ Active

Name

Abbreviation

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.

Triggers

Name	Abbreviation	Modified
Failed	CAL-FAIL	10/10/2023 John
Not Calibrated	CAL-NOT	10/9/2023 Christopher

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



Triggers

+ New Trigger

Name	Abbreviation	Modified
Failed	CAL-FAIL	10/10/2023 [CDT] John
Not Calibrated	CAL-NOT	10/9/2023 [CDT] Christopher

- a. Click the 'Edit' button.

EventPatrol / Configure / Categories / Calibration / Caliper

Calibration

Caliper

Abbreviation CLPR

+ Created Christopher 7/5/2023 3:48 PM [CDT]

Edit Delete

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

EventPatrol / Configure / Categories / Calibration / Caliper

Calibration

Caliper

Active

Name Caliper

Abbreviation CLPR

+ Created Christopher 7/5/2023 3:48 PM [CDT]

Save Changes Cancel

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.

EventPatrol

Configure

Categories and Triggers

Define the categories and triggers that cause events..

Tasks

Configure tasks that can be applied to each event.

17. Click on the desired Task name.



Tasks

Tasks

Name	Allocated Hours	Required
Investigation	240	
Root Cause Analysis	240	
Risk Assessment	240	

Tasks with Actions

Name	Allocated Hours	Required	Action Approval Required
Containment	120		
Safety	120		

18. Click the 'Edit' button.

EventPatrol / Configure / Tasks / Investigation

Task

Investigation Active Edit

Allocated Hours 240

☐ Required

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.

EventPatrol / Configure / Tasks / Investigation

Edit Task

Investigation ☒ Active Save Changes Cancel

Allocated Hours 240

☐ Required

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.

EventPatrol / Configure / Tasks / Containment

Task

Containment Active Edit

Allocated Hours 120

☐ Required

☐ Action Approval Required



Chapter 4: New Event

 Users with the following permission can create new events.

Yes

Create

Allows users to create events that originate from EventPatrol.

Event Sources

Events can originate from three modules within PatrolSuite:

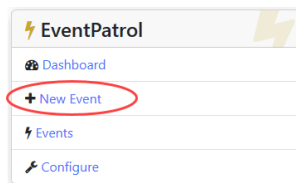
AuditPatrol. Each question in an audit can be related to one event. AuditPatrol events should be created only from within the AuditPatrol app.

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

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



- 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.



Title

☒ Active

Description

Owner  **Christopher**
Executive / Morristown
(630)
chris@map

- Required Field
- Required Field
- Required Field
- Required Field

Accessibility ☒ Public ☐ Private

Category

Facility

Manufacturing Line

Customer Number

Product Number

Sales Order

Quantity

Unit of Measure

Internal Reference

Trigger

Department

Workcenter

Supplier Number

Order Number

Purchase Order

Value

Currency

External Reference

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



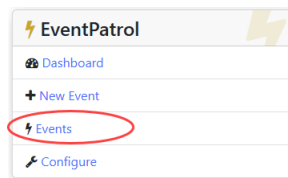
Chapter 5: Search Events

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

 Yes	View	Allows users to view all 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.

- My Events.** Check the checkbox to view events in which you have a role.
- Source.** Select the PatrolSuite app where the event originated.
- Facility.** Select a desired facility to view events only for the chosen facility.
- User.** Select a desired user to view only events in which the user has a role.
- 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.

- 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.

EventPatrol

Events

Product, customer, or order Search Reset

☐ My Events	Source Any	Facility Any
User Anyone	Department Any	Status Any
Category Any	Manufacturing Line Any	Canceled Not Canceled
Subcategory/Trigger Any	Workcenter Any	

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.

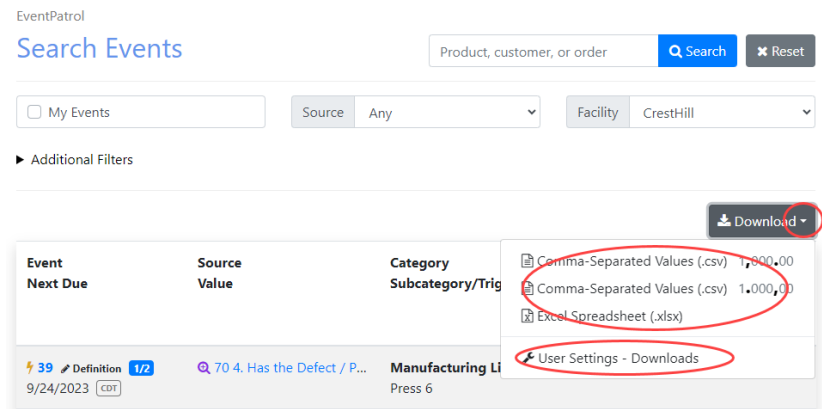
Download

Event Next Due	Source Value	Category Subcategory/Trigger	Facility Department	Product Number / Product Name Customer Number / Customer Name
39 Definition 1/2 9/24/2023 CDT	70.4. Has the Defect / P...	Manufacturing Line Press 6	CrestHill	
28 Approval 6/9 6/24/2023 CDT	M - Insect Chicago Plant \$7,150.00 USD	Foreign Material Animal/Insect	CrestHill Manufacturing	0700430 12" TN... 0070020504 AC...
17 Definition 0/1 10/2/2023 CDT	Complaint 135 (R\$997,764.00) BRL	Delivery Late	CrestHill Manufacturing	15898 WM16TN... 0070020504 AC...

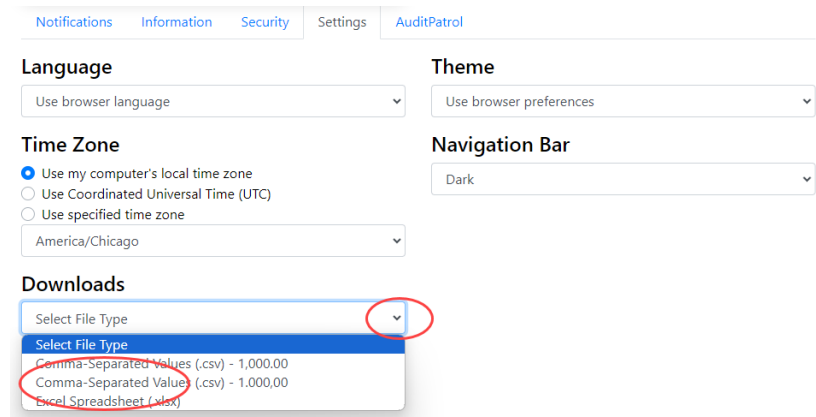
Note: The icons indicate the source of the event. The lightning bolt indicates an event that originated from EventPatrol.

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.
---	------	----------------------------------

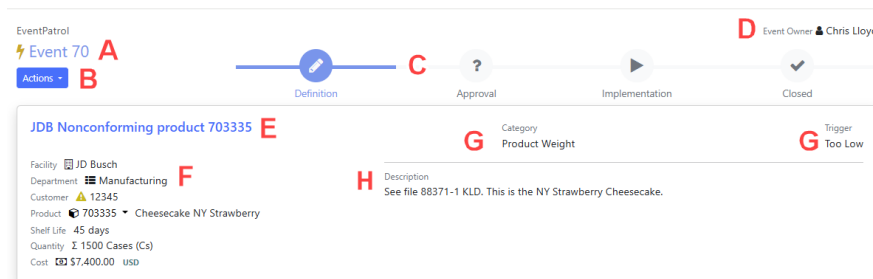
Event Header

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.

Event Next Due	Source Value	Category Subcategory/Trigger	Facility Department	Product Number / Product Name Customer Number / Customer Name
 70  Approval  1/20/2024 	 JDB Nonconforming pro... \$7,400.00 USD	Product Weight Too Low	 JD Busch Manufacturing	

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



The screenshot shows the Event Header page for Event 70. The page is organized into several sections:

- A:** Event number (70)
- B:** Action button (Actions)
- C:** Event Status (Definition, Approval, Implementation, Closed)
- D:** Event Owner ID (Chris Lloyd)
- E:** Event Title (JDB Nonconforming product 703335)
- F:** Event Meta data (Facility: JD Busch, Department: Manufacturing, Customer: 12345, Product: 703335, Shelf Life: 45 days, Quantity: 1500 Cases (Cs), Cost: \$7,400.00 USD)
- G:** Event Category and Subcategory/Trigger (Category: Product Weight, Trigger: Too Low)
- H:** Event Description (See file 88371-1 KLD. This is the NY Strawberry Cheesecake.)



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.

Tasks & Actions

Timeline

Files

8D Report

Event Summary

Management Review

Tasks

Investigation

Chris Lloyd

Complete

Wednesday, April 29th 2026

Root Cause Analysis

Chris Lloyd

Complete

Tuesday, September 3rd 2024

Risk Assessment

Mark Takaki

Complete

Wednesday, April 29th 2026

All tasks for this event have been assigned

2024-08-13

Approval

+ Select Approval Route

Tasks with Actions

Containment

John Wick

All Actions Assigned

Wednesday, January 15th 2025

1/3 Actions Complete

Action 10219

Action 10222

Action 10235

John Telford

Craig Leide

Gary Lail

Overdue 2025-01-20

Complete 2025-04-10

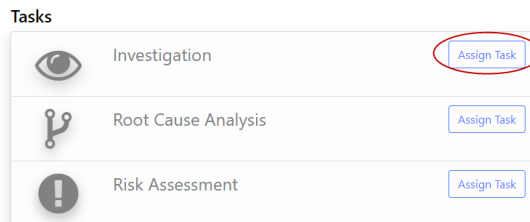
Overdue 2025-02-13



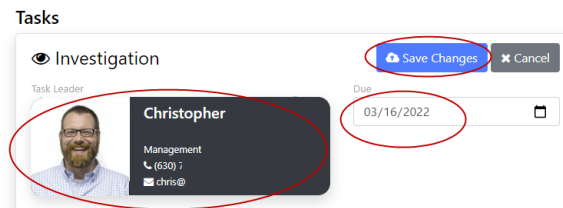
Chapter 7: Tasks - Investigation

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.

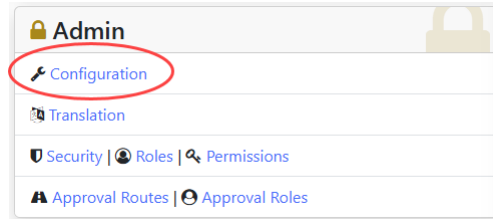
NEW **Note:** A good investigator will spend more time answering these questions and very little time writing the problem statement because PatrolBot artificial intelligence will use these answers to write the problem statement for the investigator.

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.



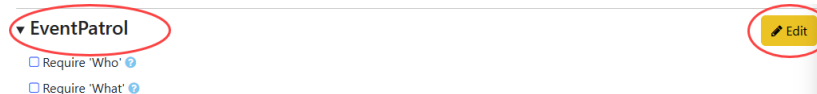
35. To manage what problem analysis information is required, click on the Admin/Configuration hyperlink.



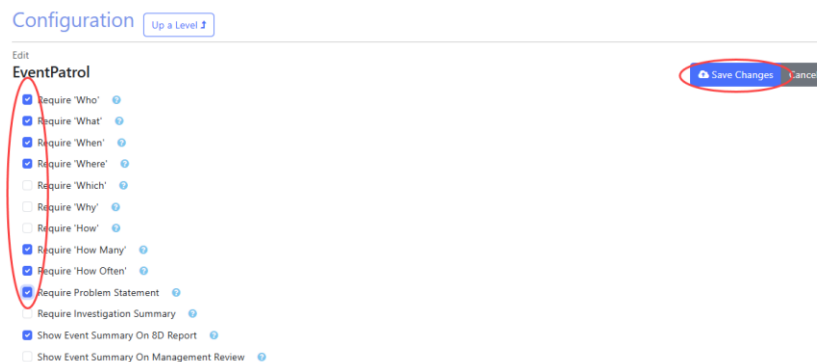
 To manage EventPatrol configuration settings, users must be in a role that grants the following permission:

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.



Internal Problem Statement ? Write with PatrolBot

Original Text

125 cases were below weight in line 3.

AI Generated Version

On January 22, 2024, at the JD Busch manufacturing facility, 125 cases of the product "Cheesecake NY Strawberry" (product number 703335) produced on line 3 were identified as being below the specified weight. The event category is "Product Weight" with a subcategory of "Too Low," and the event involves a total of 1,500 cases valued at approximately USD 7,400. The issue was documented under the event titled "JDB Nonconforming product 703335," referencing file 88371-1 KLD. No procedures violations or training issues are indicated. The problem pertains to cases that did not meet weight specifications during manufacturing, with no additional contextual details provided.

- To accept the AI Generated problem statement, click on the 'Save Changes' button.
- To retain the Original Text (and disregard the AI Generated problem statement), click on the 'Cancel' button.

Problem Analysis **Problem Statement** **Recommendations** **Investigation Summary**

Save Changes **Cancel**

Did this problem result from a violation of procedures?
☐ Yes ☒ No ☐ Not Applicable

Procedure Numbers

Were all people involved trained on the procedures?
☐ Yes ☐ No ☒ Not Applicable

Internal Problem Statement ? Write with PatrolBot

Original Text

125 cases were below weight in line 3.

AI Generated Version

On January 22, 2024, at the JD Busch manufacturing facility, 125 cases of the product "Cheesecake NY Strawberry" (product number 703335) produced on line 3 were identified as being below the specified weight. The event category is "Product Weight" with a subcategory of "Too Low," and the event involves a total of 1,500 cases valued at approximately USD 7,400. The issue was documented under the event titled "JDB Nonconforming product 703335," referencing file 88371-1 KLD. No procedures violations or training issues are indicated. The problem pertains to cases that did not meet weight specifications during manufacturing, with no additional contextual details provided.

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

Internal Problem Statement ? Write with PatrolBot

125 cases were below weight in line 3.

- Click the 'Edit' button.

Text Translation

Source Text

125 cases were below weight in line 3.

This text has not been translated.

Edit

- Enter the localized text and click the 'Save Changes' button.

Edit Data Translation

Save Changes **Cancel**

Source Text

125 cases were below weight in line 3.

Language	Text
Chinese - 中国人	
Dutch - Nederlands	

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:

- Record recommendations for containment and correction action.
- Record recommendations for corrective and preventive action.
- 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.
- Click the Save Changes button.

Investigation

Task Leader John Telford

Click when the investigation is complete

Problem Analysis Problem Statement Recommendations Investigation Summary

Edit

Containment and Correction Recommendations

Was this problem already corrected at the time of the investigation?

Yes No Unknown

Corrective and Preventive Recommendations

See below.

Were prevention actions resulting from this incident already implemented at the time of this investigation?

Yes No Unknown

Prevention actions were previously implemented as a result of a previous similar incident.

Additional Recommendations

☒ Root Cause Analysis	☒ Preventive Actions	☒ Health Hazard Analysis
☒ Risk Assessment	☐ Verification/Validation Actions	☐ Human Resources Review
☒ Containment Actions	☐ Close the event without further actions	☐ Procedure / Work Instruction Review
☐ Safety Actions	☐ Engineering / Manufacturing Review	☐ Product Design Review
☐ Correction Actions	☐ Environmental Impact Review	☐ Product Specifications Review
☒ Corrective Actions	☐ Financial Review	☐ Regulatory Review

Must implement on or before June 1, 2026.

NEW 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.

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

Investigation

Task Leader Chris Lloyd

*Required fields have not been completed

Problem Analysis Problem Statement Recommendations Investigation Summary

History Edit



There are two options for writing the Investigation Summary:

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

The screenshot shows the 'Investigation Summary' tab selected in the top navigation bar. Below the tabs, there is a 'Write with PatrolBot' button. The main text area contains the text: '125 cases below weight. Found that the in-line check weigher was not calibrated correctly.' The 'Save Changes' button is circled in red.

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

The screenshot shows the 'Investigation Summary' tab selected in the top navigation bar. Below the tabs, there is a 'Write with PatrolBot' button. The 'Save Changes' button is also visible. The 'Write with PatrolBot' button is circled in red.

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.

The dialog box is titled 'Incomplete Inputs'. It states: 'The following fields are missing: Recommendations'. It also says: 'We recommend completing necessary fields before generating.' At the bottom, there are two buttons: 'Back to Edit' and 'Generate Anyway'.

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

The screenshot shows the 'Investigation Summary' tab selected. It displays two columns: 'Original Text' and 'AI Generated Version'. The 'Original Text' contains the same text as the previous screenshots. The 'AI Generated Version' contains a more detailed summary: 'Event Overview: On January 22, 2024, an investigation was initiated regarding product 71311, Cheesecake NY Strawberry, produced on Line 3 at the JDB manufacturing facility. The event involved 1,500 cases identified as being below weight, with a total value of USD \$7,400. The issue was categorized under "Product Weight" with the subcategory "Too Low." Problem Description: A total of 1,500 cases of Cheesecake NY Strawberry were found to be'. Both text areas are circled in red.

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



Aggregate History

Investigation 46 Item History Advanced

Investigation 46 Modified Chris Lloyd 29-April-2026 15:08 PM

Problem Statement Internal A total of 1,500 cases of product 70335, Cheesecake NY Strawberry, produced on Line 3 at J06 manufacturing facility, were identified as being below weight. The issue pertains to cases categorized under "Product Weight" with the subcategory "Too Low." The event was recorded on January 22, 2024, and involved cases that are within shippable specifications but still below the specified weight standards. The problem was documented as "Cases below weight" affecting the specified quantity and value of USD \$7,400. No procedures violations or training issues are indicated. The event details are documented in file 88371-1 KLD.

125 cases were below weight in line 3:

Investigation 46 Modified Chris Lloyd 29-April-2026 14:53 PM

Problem Statement External A few cases of product 70335 produced on Line 3 were found to be slightly below weight, but within shippable specifications.

Investigation 46 Modified Chris Lloyd 29-April-2026 14:49 PM

Use Problem Statement Internal False
True

Investigation 46 Modified Chris Lloyd 29-April-2026 14:11 PM

Use Problem Statement Internal True
False

Investigation 46 Created prior to audit trail 23-January-2024 10:26 AM

Investigation Id	46
Event Workflow Task	Workflow Task 3
Problem Statement Internal	125 cases were below weight in line 3.
Problem Statement External	NULL
Report Internal	125 cases below weight. Found that the in-line check weigher was not calibrated correctly.

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.

Aggregate History

Investigation 46 Item History ☒ Advanced

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.

Investigation

Task Leader: Christopher

Click when the investigation is complete

Problem Analysis Problem Statement Investigation Report Recommendations

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

Tasks

	Investigation Christopher	✓ Completed Sunday, March 6th 2022 CST
	Root Cause Analysis Christopher	Due Saturday, March 12th 2022 CST



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

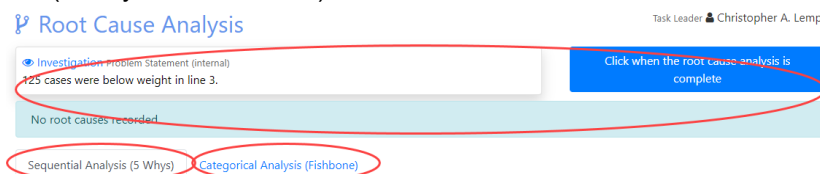
46. Follow the instructions in the preceding chapter to assign this task to a Task Leader and to open the task.

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.

The screenshot shows the top navigation bar with 'Sequential Analysis (5 Whys)' and 'Categorical Analysis (Fishbone)' tabs. Below the tabs, a green '+ Add Why' button is highlighted with a red circle.

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).

The screenshot shows the 'Add Why' form. The 'Why' field contains 'The wrong cartons were used'. The 'Rank' dropdown is set to '6'. The 'Observable Symptoms' field contains 'cartons seemed to hold more liquid'. The 'Comments' field is empty. The 'Category' dropdown is set to 'Materials', the 'Department' dropdown is set to 'Manufacturing', and the 'Workcenter' dropdown is set to 'ARL_Gallons'. The 'Root Cause' checkbox is unchecked. The 'Save Changes' button is highlighted with a red circle. Below the form, a green '+ Add Branch' button is visible.

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

The screenshot shows the 'Add Why' form with the 'Why' field containing 'Why 1 The wrong cartons were used'. The 'Rank' dropdown is set to '6'. The 'Observable Symptoms' field contains 'cartons seemed to hold more liquid'. The 'Comments' field is empty. The 'Department' dropdown is set to 'Manufacturing' and the 'Workcenter' dropdown is set to 'ARL_Gallons'. The 'Root Cause' checkbox is unchecked. The 'Save Changes' button is highlighted with a red circle. Below the form, a green '+ Add Branch' button is visible. A submenu is open, showing the '+ Add Why' button highlighted with a red circle.

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.

The screenshot shows the 'Add Why' form with the 'Why' field containing 'Why 1 The wrong cartons were used'. The 'Rank' dropdown is set to '6'. The 'Observable Symptoms' field contains 'cartons seemed to hold more liquid'. The 'Comments' field is empty. The 'Department' dropdown is set to 'Manufacturing' and the 'Workcenter' dropdown is set to 'ARL_Gallons'. The 'Root Cause' checkbox is unchecked. The 'Save Changes' button is highlighted with a red circle. Below the form, a green '+ Add Branch' button is visible. A submenu is open, showing the '+ Add Why' button highlighted with a red circle.



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 from 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).

The screenshot shows the 'Categorical Analysis (Fishbone)' tab selected. The interface lists several categories: Environment, Equipment, Measurement / Measurement Systems, Materials, People / Training, and Paperwork / Procedures / Process. Each category has an 'Add Cause' button. The 'Equipment' category is expanded, showing a cause entry for 'In-line check weigher out of calibration' (Cause B1). This entry includes a Rank of 10, Symptoms ('The 10 pound standard measured 9.6 pounds'), and is associated with the Department 'Maintenance' and Workcenter 'ARL_Gallons'. The date '1/23/2024' and user 'Nobody' are also visible. The 'People / Training' category also has an 'Add Cause' button highlighted with a red circle.

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.

The screenshot shows the 'Add Cause' form for the 'People / Training' category. The form includes a 'Name' field with the text 'The wrong procedure was used to calibrate the check weigher'. The 'Rank' is set to '10 - Most Likel'. The 'Observable Symptoms' field contains 'Investigation evidence'. The 'Comments' field contains 'The operator mistakenly used SOP 178854'. The 'Category' is 'People / Training', 'Department' is 'Maintenance', and 'Workcenter' is 'ARL_Gallons'. The 'Root Cause' checkbox is checked, and the 'Save Changes' button is highlighted with a red circle.

61. The new cause will appear.

The screenshot shows the 'People / Training' category with the new cause entry 'Cause C1 The wrong procedure was used to calibrate the check weigher'. This entry has a Rank of 10, Symptoms of 'Investigation evidence', and is associated with the Department 'Maintenance' and Workcenter 'ARL_Gallons'. The date '1/23/2024' and user 'Nobody' are also visible.

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.

Sequential Analysis (5 Whys) | Categorical Analysis (Fishbone)

Branch A

Why 1 The wrong cartons were used A1

Rank 6 Symptoms Cartons were not filled to the top with liquid Comments

Department Manufacturing Workcenter ARL_Gallons 1/23/2024 CST Nobody

Why 2 We were out of stock of the normal cartons A2

Rank 6 Symptoms Wrong SKU; no stock in the warehouse Comments

Department Manufacturing Workcenter ARL_Gallons 1/23/2024 CST Nobody

Branch B

Why 1 In-line check weigher out of calibration B1

Rank 10 Symptoms The 10 pound standard measured 9.6 pounds Comments

Department Maintenance Workcenter ARL_Gallons 1/23/2024 CST Nobody

Branch C

Why 1 The wrong procedure was used to calibrate the check weigher C1

Rank 10 Symptoms Investigation evidence Comments The operator mistakenly used SOP 178854.

Department Maintenance Workcenter ARL_Gallons 1/23/2024 CST Nobody

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

Branch C

Why 1 The wrong procedure was used to calibrate the check weigher C1

Rank 10 Symptoms Investigation evidence Comments The operator mistakenly used SOP 178854.

Department Maintenance Workcenter ARL_Gallons 1/23/2024 CST Nobody

Submenu: Edit, Add Why, Move, Delete

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

Move Root Cause

Parent Cause

1 - In-line check weigher out of calibration

None

A

1 - The wrong cartons were used

2 - We were out of stock of the normal cartons

B

1 - In-line check weigher out of calibration

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



Sequential Analysis (5 Whys)
Categorical Analysis (Fishbone)

Branch A

Why 1 The wrong cartons were used

A1

Rank 6
Symptoms
Cartons were not filled to the top with liquid
Comments

Department Manufacturing
Workcenter ARL_Gallons
1/23/2024 CST
Nobody

Why 2 We were out of stock of the normal cartons

A2

Rank 6
Symptoms
Wrong SKU; no stock in the warehouse
Comments

Department Manufacturing
Workcenter ARL_Gallons
1/23/2024 CST
Nobody

Branch B

Why 1 In-line check weigher out of calibration

B1

Rank 10
Symptoms
The 10 pound standard measured 9.6 pounds
Comments

Department Maintenance
Workcenter ARL_Gallons
1/23/2024 CST
Nobody

Why 2 The wrong procedure was used to calibrate the check weigher

B2

Rank 10
Symptoms
Investigation evidence
Comments
The operator mistakenly used SOP 178854.

Department Maintenance
Workcenter ARL_Gallons
1/23/2024 CST
Nobody

Completing & Reopening the RCA Task

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

Root Cause Analysis
Task Leader Christopher

Investigation Problem Statement (internal)
125 cases were below weight in line 3.

Click when the root cause analysis is complete

Root Causes

Equipment
In-line check weigher out of

People / Training
The wrong procedure was used to

68. Click the Complete button in the confirmation window.

69. To reopen the RCA task, click the reopen icon.

Root Cause Analysis
Task Leader Christopher

Investigation Problem Statement (internal)
125 cases were below weight in line 3.

Root Cause Analysis completed
1/23/2024 3:08 PM CST



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 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.

Risk Assessment Task Leader: Christopher

Severity
None
Comments

Frequency
None
Comments
Occurrence Date
A defect occurrence has not been entered

Detectability
None
Comments

Edit

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 Detectability from the dropdown list. Add comments if necessary.

75. Click the Save Changes button.



Risk Assessment Task Leader Christopher

[Save Changes](#) [Cancel](#)

Severity
(Select the severity...)
Comments

Frequency
(Select the frequency...)
Comments

Occurrence Data
This problem occurred times in the past
(Select Defect Frequency)

Detectability
(Select the detectability...)
Comments

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.

Risk Assessment Task Leader Christopher A. Lemp

Risk Priority Number 48
Unacceptable risk. Corrective action is required.

[Mark Task as Complete](#) [Edit](#)



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.

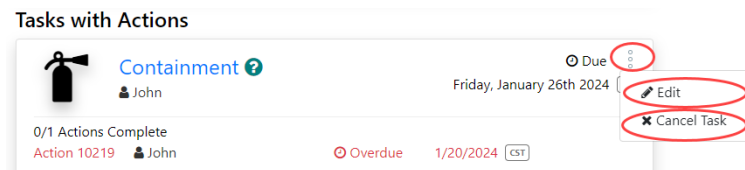
Assign the remaining Tasks to a Task Leader

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

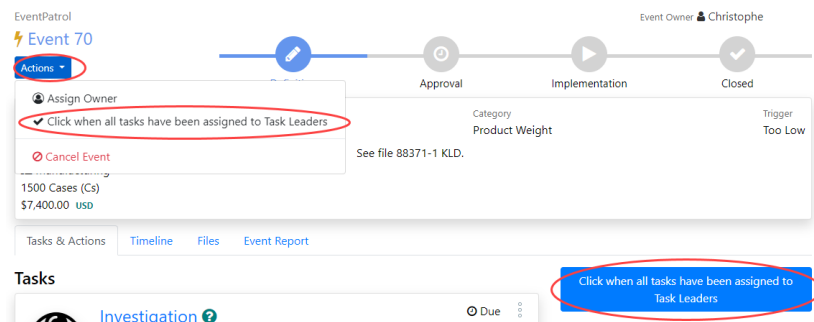
80. Click on the ellipses and click on Edit to change the Task Leader or the due date.
- a. Click on Cancel Task to un-assign the task.



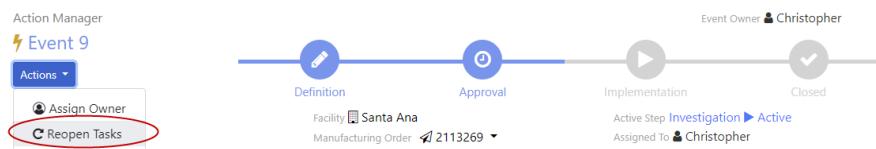
All Tasks Assigned

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.

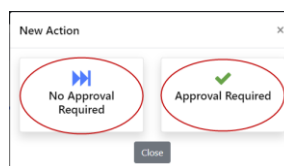
This chapter applies to all Tasks with Actions, as the management of each action is identical.

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.

EventPatrol

User Guide

Version 2026-04



Correction

Task Leader  John

Show actions assigned to

(Anyone)

All action assignments completed

2022-03-10 2:01 AM 

[+ 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 

Date Due

2022-03-10 5:00 PM 

 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 

Date Due

2022-03-09 8:00 AM 

[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 

Date Due

2022-12-03 10:00 AM 

Closed By

 John

2022-03-10 1:26 AM 

 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 

Date Due

2022-12-03 10:00 AM 

Closed By

 John

2022-03-10 1:28 AM 

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 

Date Due

[Close Action](#)



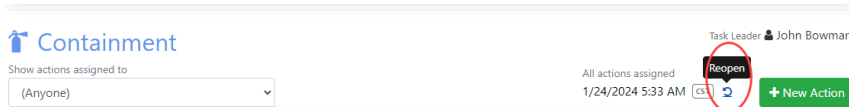
All Actions Assigned

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.

The screenshot shows the 'Event 9' interface. At the top, there's a progress bar with four steps: Definition, Approval, Implementation, and Closed. The 'Approval' step is currently active. Below the progress bar, there's a 'Tasks' section. In the 'Tasks' section, there's a task titled 'Investigation' with a status of 'Completed' and a date of 'Tuesday, March 8th 2022'. To the right of this task, there's a button labeled 'Approval' with a sub-button 'Select Approval Route' circled in red.

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

The 'New Approval Attempt' dialog box is shown. It has a green header with a close button. Below the header, there's a section titled 'Approval Route' with a dropdown menu. The dropdown menu is open, showing 'Quality Approval' as the selected option. At the bottom of the dialog, there are two buttons: '+ Create' (circled in red) and 'Cancel'.

Starting the Approval Route

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



Action Manager
Event 9

Complaint 125
Validity Inconclusive

Facility Santa Ana
Manufacturing Order 2113269

Event Owner Christopher

Definition Approval Implementation Closed

Active Step Investigation Active
Assigned To Christopher

Tasks

- Investigation (Completed Tuesday, March 8th 2022)
 - Root Cause Analysis
 - Risk Assessment

Approval

Quality Approval (Not Started)

Approvers Start

Quality Coord/Engineer - Plant	1
Nobody	
Quality Manager - Corporate	2
Nobody	

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.

Tasks

- Investigation (Completed Tuesday, March 8th 2022)
 - Root Cause Analysis
 - Risk Assessment

Approval

Quality Approval (Not Started)

Save Changes Cancel

Quality Coord/Engineer - Plant	1
Nobody	
Quality Manager - Corporate	2
Nobody	

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.

Tasks

- Investigation (Completed Tuesday, March 8th 2022)
 - Root Cause Analysis
 - Risk Assessment

Approval

Quality Approval (Not Started)

Save Changes Cancel

Quality Coord/Engineer - Plant	1
John	
Quality Manager - Corporate	2
Christopher	

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

Tasks

- Investigation (Completed Tuesday, March 8th 2022)
 - Root Cause Analysis
 - Risk Assessment

Approval

Quality Approval (Not Started)

Approvers Start

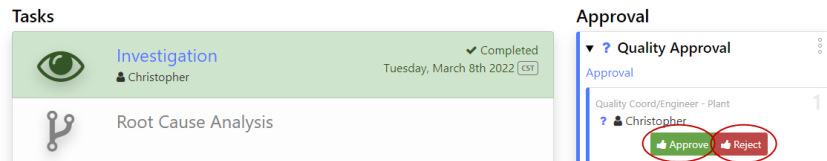
Quality Coord/Engineer - Plant	1
John	
Quality Manager - Corporate	2
Christopher	



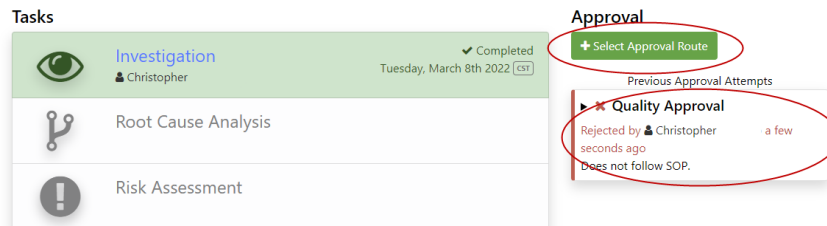
Approval or Rejection

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.

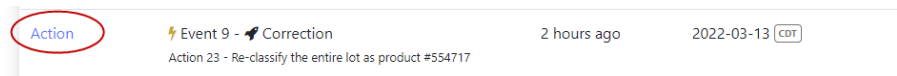


Action Completion by ARPs

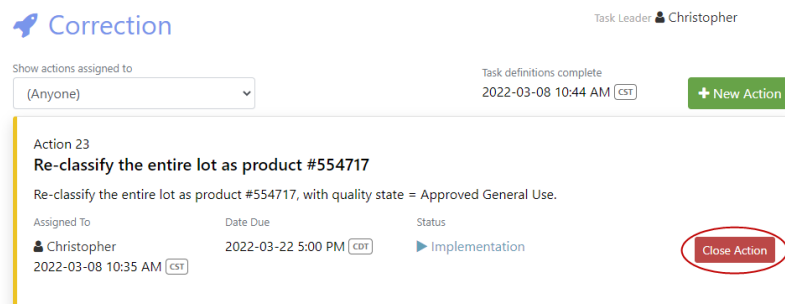
102. From the PatrolSuite homepage, click on My Tasks.



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.

The 'Close Action' dialog box has a blue header. Below the header, it says 'Action 23' and 'Select the outcome of this action'. There are two radio buttons: 'Action complete' (selected and circled in red) and 'Unable to complete'. Below this is a 'Comment' section with a large text area (circled in red). At the bottom right, there are two buttons: 'Close Action' (circled in red) and 'Cancel'.

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 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 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 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 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 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 Late 809 days 17 hours	Chris Lloyd	819 days 4 hours
				Total	4193 days 17 hours

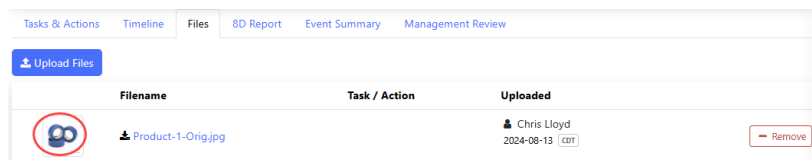


NEW Chapter 15: Files

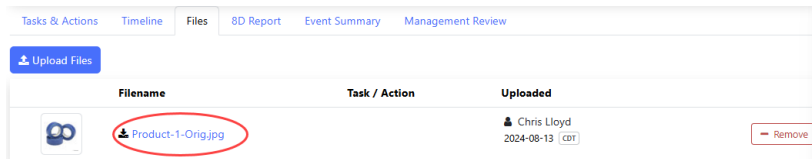
NEW View & Manage Event Files

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.

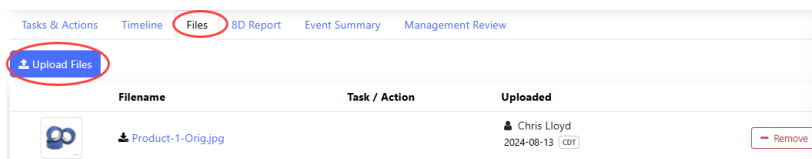
108. To view a file, click on the thumbnail.



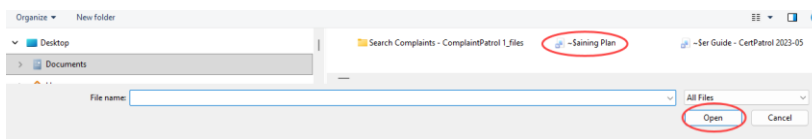
109. To download a file, click on the filename hyperlink.



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.

8D Report

JD B
12345 Bu
Santa Fe

70

Customer Information

Number	12345
Name	
Address	
Purchase Order Number	

Event Information

Date Created	22-January-2024 08:06 AM (PT)	Product Number	703335
Date Investigation Closed		Product Name	
Category	Product Weight	Order Number	
Subcategory	Too Low	Sales Order Number	
Facility	JD Buach		
Department	Manufacturing		

Team Members

Owner: Chris Lloyd

Task Leaders	Action Responsible Persons
Investigation: Chris Lloyd	Containment: Craig Leider
Root Cause Analysis: Chris Lloyd	Containment: Gary Lall
Risk Assessment: Mark Takai	Containment: John Telford
Containment: John Wick	Safety: Chris Lloyd
Safety: Gary Lall	Corrective: Craig Leider
Corrective: Chris Lloyd	Corrective: Gary Lall
Preventive: Chris Lloyd	Corrective: John Telford
	Corrective: John Wick
	Preventive: Craig Leider

Problem Statement

A few cases of product 703335 produced on Line 3 were found to be slightly below weight, but within shippable specifications.

Containment Actions

Action Date	Assigned To	Description
10219 2023-01-20	John Telford	Place cases in quarantine area S1.
10222 2023-02-01	Craig Leider	Add unit numbers to SAP
10235 2023-02-13	Gary Lall	Update SOP

Root Causes

Category	Cause	Symptoms
Equipment	In-line check weigher out of calibration	The 10 pound standard measured 9.6 pounds
People / Training	The wrong procedure was used to calibrate the check weigher	Investigation evidence

Corrective Actions

Action Date	Assigned To	Description
10233 2023-01-10	John Telford	Update the on-floor SOP #02564
10235 2023-02-09	Craig Leider	Increase the volume of the low weight alarm to level 7
10236 2023-02-09	John Wick	Change the calibration to monthly
10238 2023-02-13	Gary Lall	Test

Preventive Actions

Action Date	Assigned To	Description
10234 2024-02-05	Craig Leider	Re-train all Line 3 operators on SOP #02564

Verification/Validation Actions

No actions assigned



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.

The screenshot displays the '8D Report' interface. On the left, there are sections for 'Customer Information' (Number, Name, Address, Purchase Order Number) and 'Event Information' (Date Created, Date Investigation Closed, Category, Subcategory, Facility, Department). On the right, there is a 'Print' panel with a dropdown menu for 'Destination' set to 'EPSON WF-4630 Serie', and other options like 'Pages', 'Copies', 'Layout', and 'Color'. A right-click context menu is open over the report, with the 'Print' option highlighted. The menu also includes options like 'Back', 'Refresh', 'Save as', 'Send tab to your devices', 'Create QR Code for this page', 'Translate to English', 'Visual Search', 'Screenshot', 'More tools', 'View page source', and 'Inspect'.



NEW Chapter 17: Event Summary

NEW Introduction

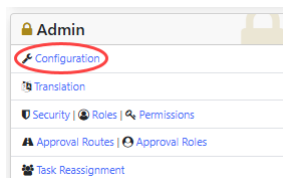
The Event Summary tab contains the written report summarizing the *entire* event from initiation, investigation, root cause analysis, risk assessment, and the tasks with actions (containment, correction, corrective, preventive, validation, etc.).

NEW 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.



Configuration [Up a Level](#)

Edit

EventPatrol

- ☐ Require 'Who'
- ☐ Require 'What'
- ☐ Require 'When'
- ☐ Require 'Where'
- ☐ Require 'Which'
- ☐ Require 'Why'
- ☐ Require 'How'
- ☐ Require 'How Many'
- ☐ Require 'How Often'
- ☐ Require Problem Statement
- ☐ Require Investigation Summary
- ☒ Show Event Summary On 8D Report
- ☒ Show Event Summary On Management Review

[Save Changes](#) [Cancel](#)

NEW Event Summary Report

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

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

History Edit

Event Summary Write with PatrolBot

test

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

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

History **Edit**

Event Summary Write with PatrolBot

There are two options for writing the Event Summary:

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

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

Save Changes [Cancel](#)

Event Summary Write with PatrolBot

115 underweight cases were produced in Line 3. The root cause was found. Actions were implemented. A report was sent to the customer.



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

The screenshot shows the 'Event Summary' tab selected in the top navigation bar. Below the navigation bar, there are buttons for 'Save Changes' and 'Cancel'. In the main content area, the 'Event Summary' title is followed by a question mark icon and a 'Write with PatrolBot' button, which is circled in red.

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.

The screenshot shows the 'Event Summary' tab with two columns: 'Original Text' and 'Generated Text'. The 'Original Text' contains the sentence: '115 underweight cases were produced in Line 3. The root cause was found. Actions were implemented. A report was sent to the customer.' The 'Generated Text' contains a more detailed summary: 'Event Overview: The event pertains to a complaint involving the production of Cheesecake NY Strawberry (product number 70335) on Line 3 at the JD Busch manufacturing facility. The issue was identified on January 22, 2024, and involves cases that are within shippable specifications but are categorized as below weight. Problem Description: A total of 1,500 cases of product 70335 were identified as being below weight, specifically under the "Product Weight" category'. Both text areas are circled in red.

- 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.

The screenshot shows the 'Event Summary' tab with the 'Save Changes' and 'Cancel' buttons circled in red.

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

The screenshot shows the 'Event Summary' tab with a localization icon (a speech bubble with a checkmark) circled in red.

- a. Click the 'Edit' button.

The screenshot shows the 'Text Translation' dialog box. It has a 'Source Text' field with the text '125 cases were below weight in line 3.' Below this is a light blue box with the text 'This text has not been translated.' To the right of the dialog box is an 'Edit' button circled in red.

- b. Enter the localized text and click the 'Save Changes' button.



Edit Data Translation

[Save Changes](#) [Cancel](#)

Source Text

125 cases were below weight in line 3.

Language	Text
Chinese - 中国人	
Dutch - Nederlands	

NEW Event Summary History

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

[History](#) [Edit](#)

Event Summary ?



Write with PatrolBot

Event Overview:

On March 3, 2026, during the morning shift at the Arlington facility's Manufacturing Line 1, Workcenter ARL_Bowl2, an environmental incident occurred involving the release of wastewater containing cleaning chemicals above the permitted limit. The event was identified as a land/water emission exceeding allowable levels.

Problem Description:

A production operator noticed that approximately 6 liters of cleaning water were discharged beyond the expected amount. The cause was traced to the drain valve connected to Bowl Mixer 2 being left open after equipment cleaning. This oversight resulted in continued flow of



NEW Chapter 18: Management Review

NEW 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.

NEW 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.

The screenshot displays the EventPatrol interface for 'Event 70'. The main content area shows event details: Facility ID Burch, Product 703135 (Chesapeake NY Strawberry), Quantity 2 1500 Cans (C4), and Category / Trigger Product Weight / Too Low. A progress bar indicates the 'Definition' phase is complete. Below this, sections for 'Problem Statement', 'Investigation Summary', 'Root Causes', and 'Risk Assessment' are visible. A right-click context menu is open over the 'Investigation Summary' section, with the 'Print' option highlighted. The print settings sidebar on the right shows '2 sheets of paper', 'Destination' set to 'EPSON WF-4630 Serie', 'Pages' set to 'All', 'Copies' set to '1', 'Layout' set to 'Portrait', and 'Color' set to 'Black and white'. A 'Print' button is at the bottom of the sidebar.



Chapter 19: Dashboard

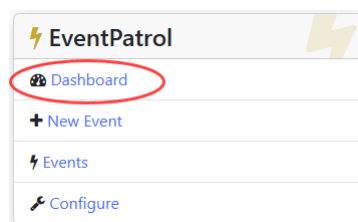
Security

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

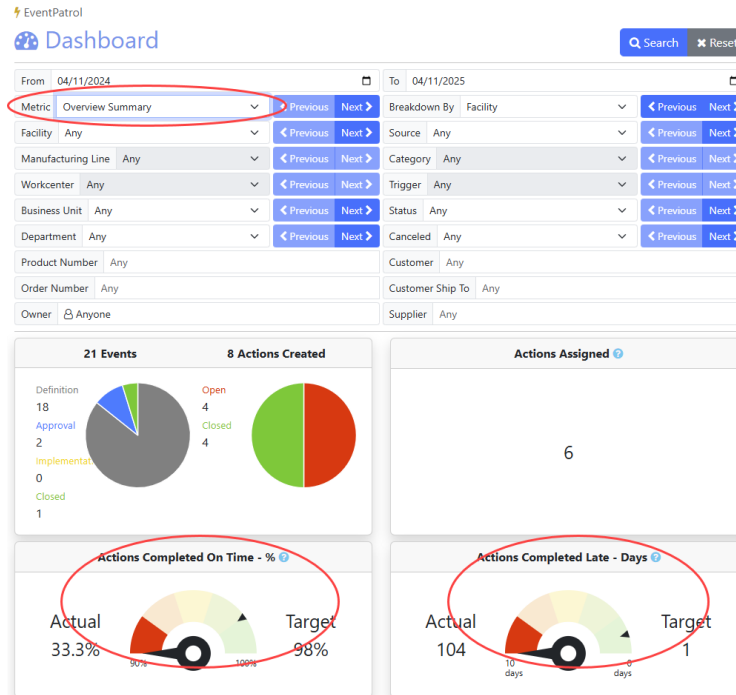
EventPatrol		
No	Add Action	Allows users to re-open a closed action task, to add new actions, and to close an action task.
No	Admin	Allows users to edit the configuration settings and all events, including changing the event owner
No	Create	Allows users to create events that originate from EventPatrol.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

Dashboard Metrics & Filtering

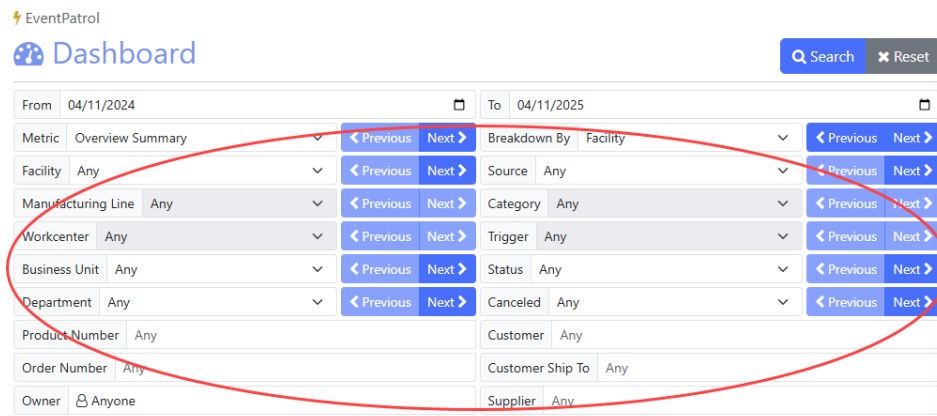
121. From the PatrolSuite homepage, click the Dashboard hyperlink in the EventPatrol card.



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.

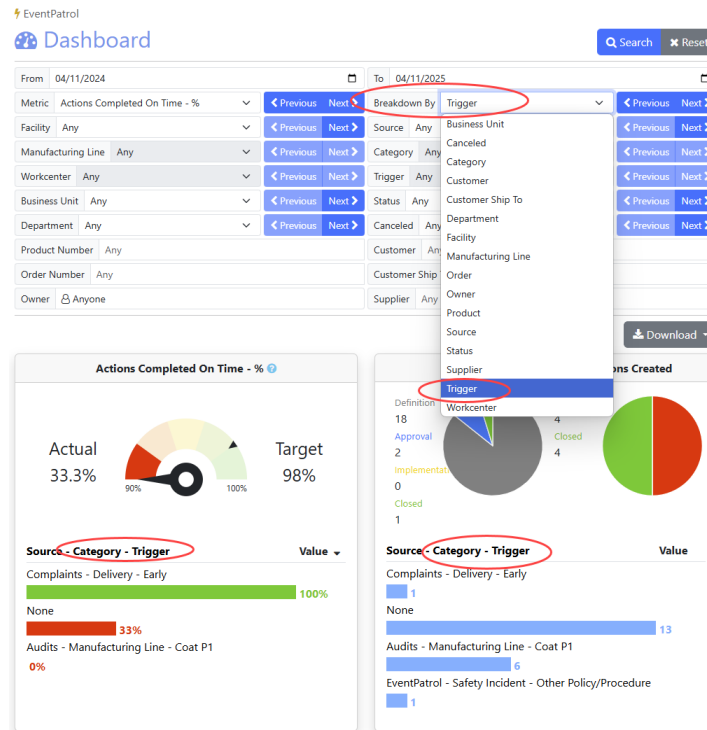


124. To breakdown a metric by desired criteria, choose a metric and select the desired breakdown variable.

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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.

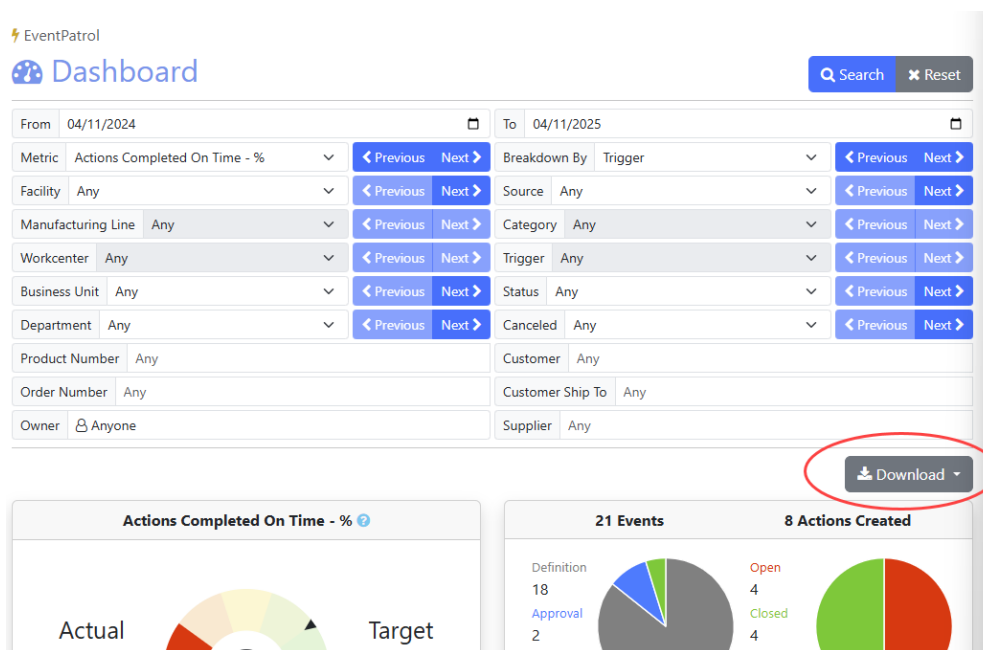




Exhibit A: Event Workflow

