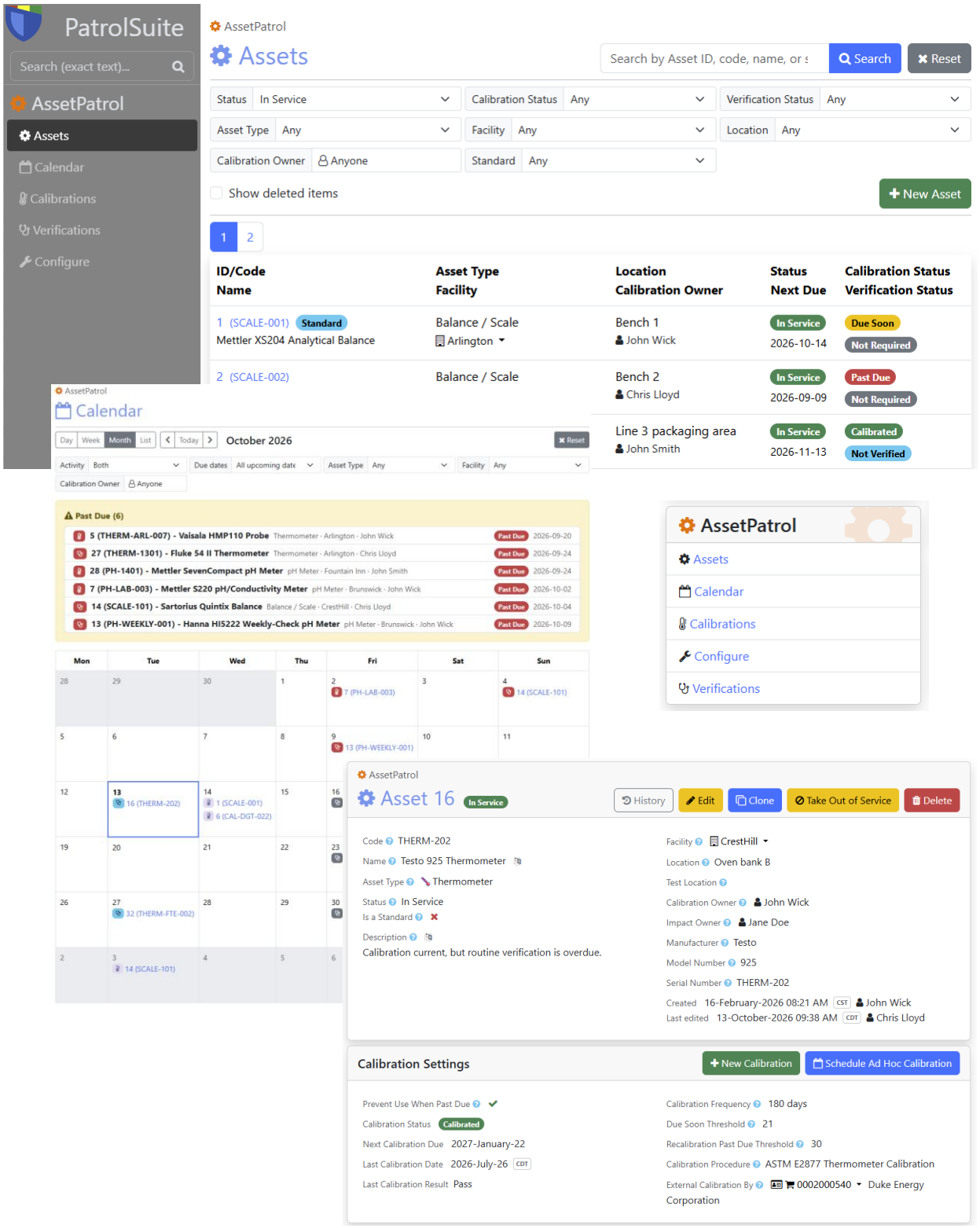
AssetPatrol
Quick Start Guide
Version 2026-10



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Introduction

AssetPatrol™ is a regulatory compliance module that prevents the use of measurement equipment that is not in a valid calibration state, helping organizations satisfy requirements for the control of monitoring and measuring equipment under ISO 9001, ISO 22000, ISO 13485, FDA 21 CFR Part 117, BRCGS, and FSSC 22000.

This **Quick Start Guide** describes the basic setup steps required to begin using AssetPatrol. It is intended as a streamlined introduction and does not cover all AssetPatrol features and functionality. For complete instructions and detailed information, see the *AssetPatrol User Guide*.

Note: Complete the steps in this guide in sequential order, as each step may depend on information or configuration established in a preceding step.

Note: AssetPatrol is designed to manage assets that require calibration. Assets that do not require calibration should not be entered into AssetPatrol.

Functionality

AssetPatrol provides the following primary functionality:

A. Documents each piece of equipment, its calibration schedule, and who is responsible for calibrating it.

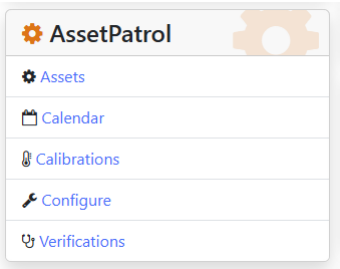
B. Tracks when calibration is due, assigns the task to the “Calibration Owner,” records the calibration results, and assigns the next calibration due date.

C. Evaluates the asset’s calibration status at the time of measurement.

D. Prevents the use of out-of-calibration equipment to record test results.

E. When an asset is found to have failed, AssetPatrol identifies the test results that were affected and assigns their review to an “Impact Owner.”

AssetPatrol Pages



- **Assets** - Displays all measurement equipment and its calibration status.
- **Calendar** - Displays the calendar of what is coming due, with a past-due rail.
- **Calibrations** - Displays all calibration records across every asset.
- **Configure** - Where asset types, calibration and verification procedures, and enabled facilities are defined.

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- **Verifications** - Displays all verification records (the checks made between full calibrations).

Quick Start Summary

1. **Read the definitions** located in Chapter 1 of the *AssetPatrol User Guide*. Don't skip this step. It's important to understand the context and terms used in this quick start guide and in the detailed user guide.
2. **Create the security Roles and assign Permissions.** See Chapter 2 of the *AssetPatrol User Guide*.
3. **Define the Facilities** where AssetPatrol will be active.
4. **Enter the Calibration and Verification Procedures** used to calibrate and verify an asset.
5. **Define the Asset Types** that organize measurement equipment into logical groups.
6. **Enter the Assets** used to measure or monitor the manufacturing process (process parameters) or the product itself (product characteristics). Include the calibration verification requirements and calibration Test Points as applicable.
7. **Enter the Verification Standards**. A verification standard is a controlled reference material or device with known characteristics used to calibrate or verify the calibration status of another asset. In AssetPatrol, a verification standard is an asset with **'Is a Standard'** selected.
8. **Calibrate the assets** and place them into service as appropriate. If an asset is already calibrated, then enter the most recent calibration data to create a starting point for the asset's history.
9. **Define the calibration-critical test methods**. For these test methods, QualityPatrol requires the user to identify the asset used to perform the measurement and verifies that the asset is in an acceptable calibration state before test results can be saved.

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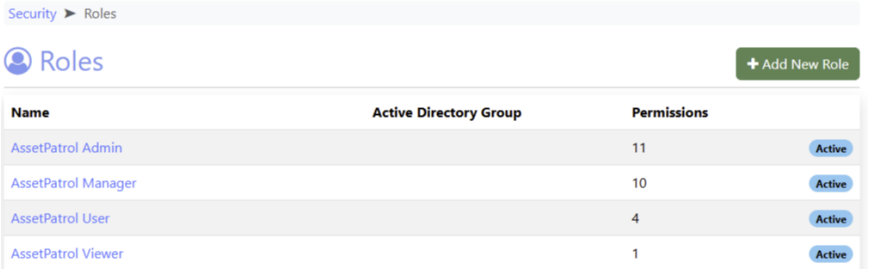
Quick Start Steps

Definitions

1. Read the definitions located in Chapter 1 of the *AssetPatrol User Guide*. It is important to have a contextual understanding of the terms used throughout this Quick Start Guide.

Security

2. Have a PatrolSuite™ Administrator:
   a. Create the following Roles:



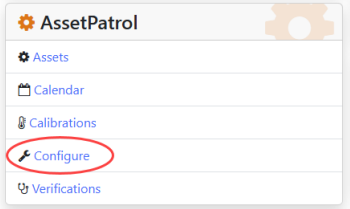
   b. For each Role, activate the permissions recommended in Chapter 2 of the *AssetPatrol User Guide*.
   c. Place the user(s) who will be the “Asset Administrator(s)” into the AssetPatrol Admin role (users cannot grant themselves access – only a PatrolSuite Admin can do this).
   d. Confirm that the AssetPatrol Admins can see the AssetPatrol card on the PatrolSuite homepage. If the card is not visible, then the user is not in the correct Role or the Permissions are not correctly granted.

Note: This guide assumes the Asset Administrator is responsible for setting up AssetPatrol, and that this person will perform the activities outlined in the remainder of this guide.

Facilities

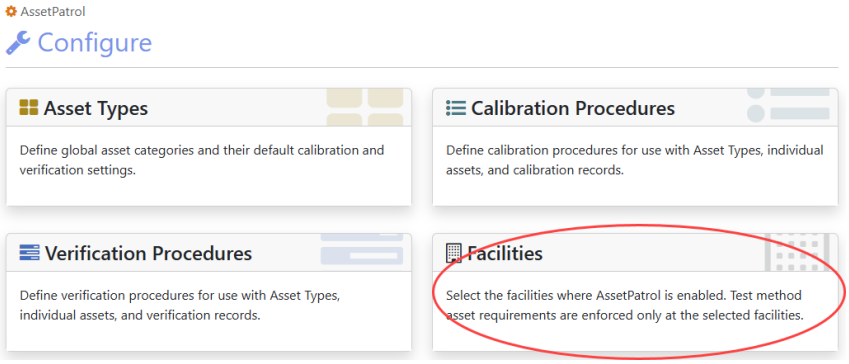
Define the facilities where AssetPatrol will be used.

3. On the AssetPatrol card, click the **Configure** hyperlink.

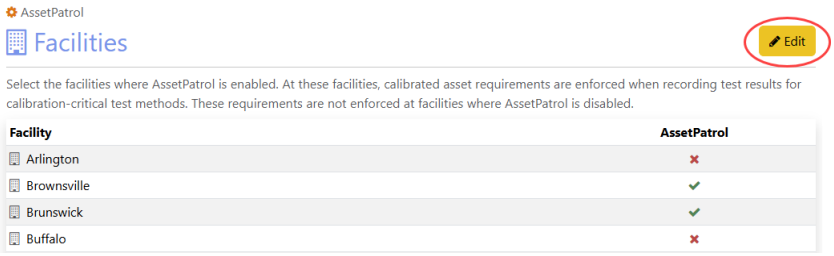


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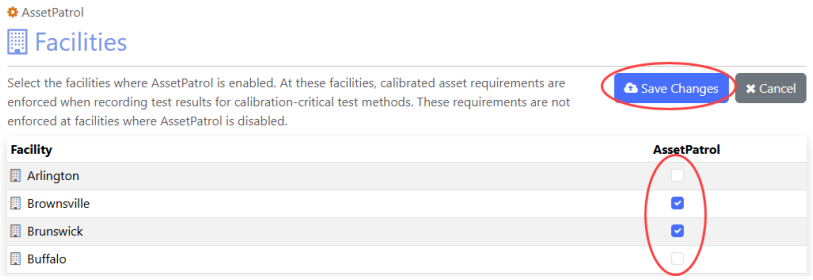
4. Click on the **Facilities** card.



5. Click the **Edit** button.



6. Check the desired facilities and click **Save Changes**.

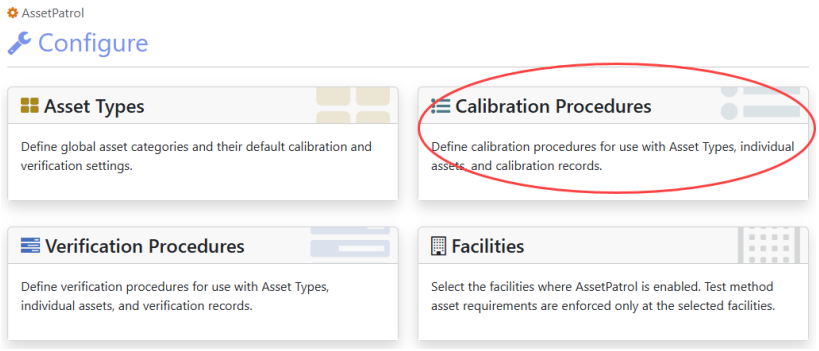


Calibration Procedures

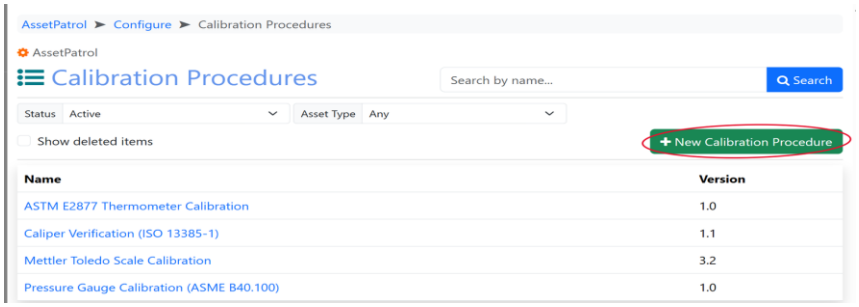
A calibration procedure is the written instruction that explains how to calibrate an instrument. Multiple assets can reference the same procedure, and the calibration records will record the applicable version of the procedure that was used.

7. On the AssetPatrol card, click **Configure** then click **Calibration Procedures.**

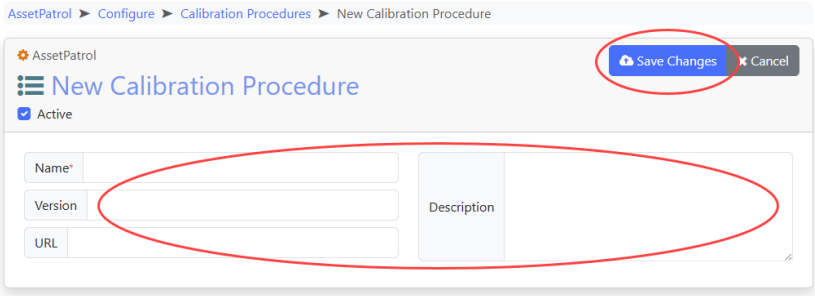
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8. Click the **New Calibration Procedure** button.



9. Enter the procedure information and click **Save Changes**.
   a. **Name**. All procedure names must be unique. For example: “ASTM E2877 Thermometer Calibration.”
   b. **Version**. The procedure revision number.
   c. **URL**. The full URL path to the document on the network or in the document management system. If a URL is provided, then a hyperlink will be provided in the calibration interface to enable the user to open the procedure.
   d. **Description**. Description of the procedure.

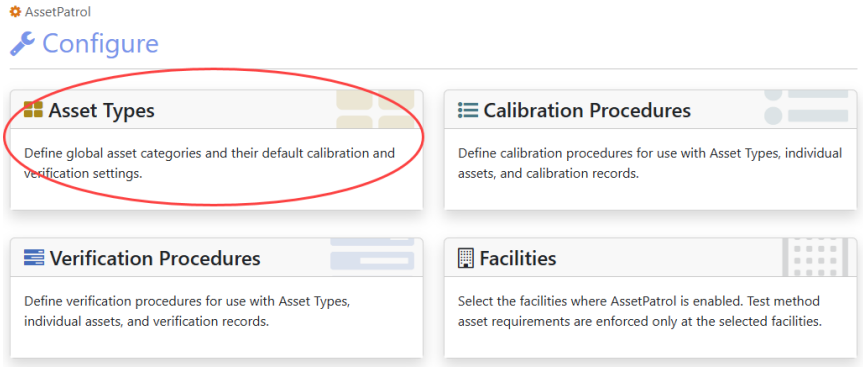


Asset Types

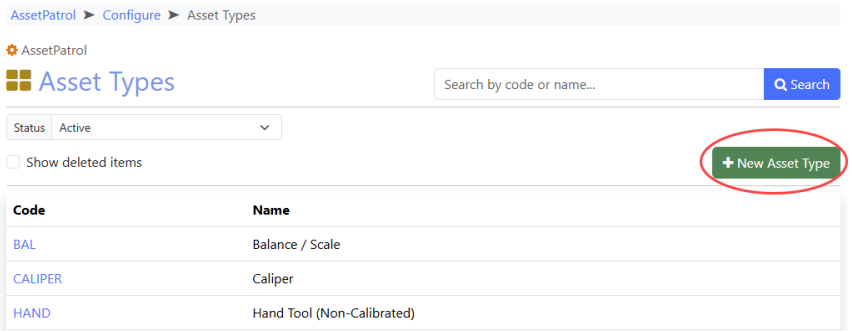
Measurement equipment is organized into logical groups (e.g. calipers, scales, thermometers, etc.) that share the same calibration defaults and settings (“**Asset Type**”). Creating asset types first makes adding the individual assets more efficient because each new asset inherits its asset type’s settings.

10. Locate the AssetPatrol card on the PatrolSuite homepage and click **Configure.** Then click **Asset**

Types.



11. Click the **New Asset Type** button.



12. Enter the asset type information and click **Save Changes**.
    a. **Code**. A short identifier (for example: `OVEN`). All codes must be unique (no duplicates).
    b. **Name**. The display name, also unique (for example: `Drying Oven`).

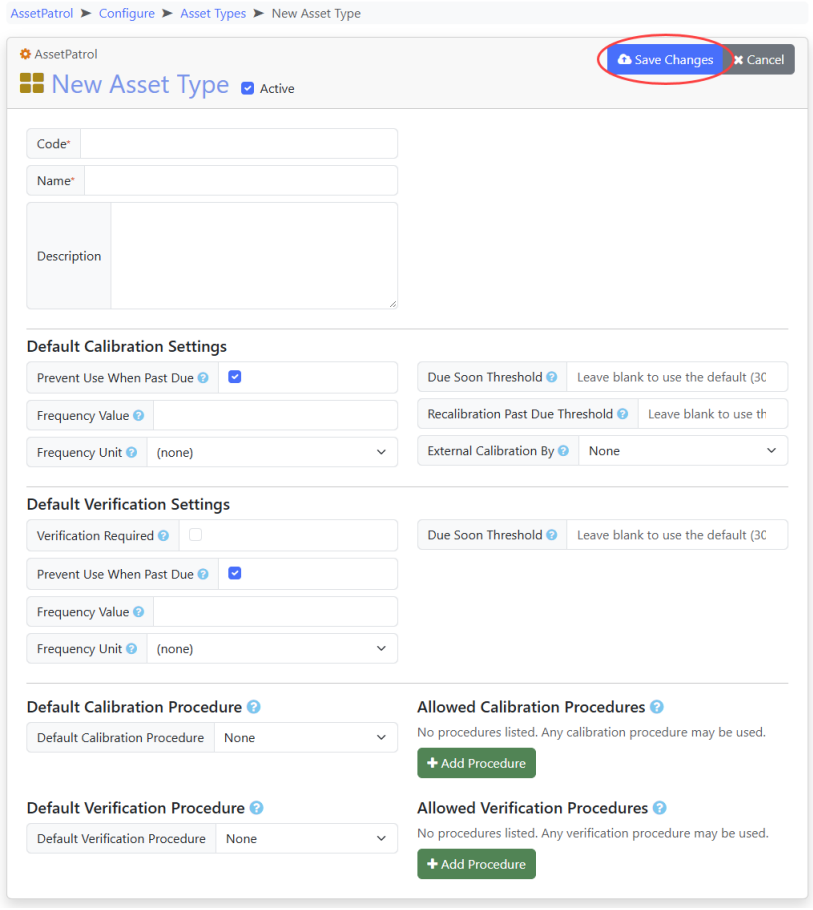
       Note: If a Code or Name that already exists is entered, a warning that contains a hyperlink to open the existing asset type will appear.
    c. **Description**. Description of the asset type.
    d. **Prevent Use When Past Due**. Check this checkbox to prevent the entry of test results (in QualityPatrol) that were measured from an asset whose calibration is past due. Leaving this box unchecked will result in a QualityPatrol past due warning instead of preventing the result from being entered.
    e. **Frequency Value** and **Frequency Unit**. How often, for example "`12`" and "`months`." Enter both or leave both blank.
    f. **Due Soon Threshold**. Define how many days ahead of the due date the asset is displayed as *Due Soon*. Leave blank to use the default of 30 days.
    g. **Recalibration Past Due Threshold**. The number of days after a failed calibration or failed verification within which the asset must be recalibrated before the recalibration shows as **Past Due**. Until the asset is recalibrated, the asset appears as **Pending Recalibration** and cannot be used.
    h. **External Calibration By**. If the asset is calibrated by an external service provider, then select the name of the business partner that performs the calibration. The external service providers (suppliers) are typically obtained from the ERP via PatrolSuite integration, or they are manually defined via PatrolSuite Ecosystem -> Business Partners -> New Business Partner (type = supplier).

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i. **Verification Required**. Check this checkbox if assets of this type require periodic verification between calibrations.

j. **Default Calibration Procedure.** Select the default calibration procedure for the asset type. To restrict assets of this type to only certain calibration procedures, click the **Add Procedure** button and select the procedures.

k. **Default Verification Procedure.** Select the default verification procedure for the asset type. To restrict assets of this type to only certain verification procedures, click the **Add Procedure** button and select the procedures.



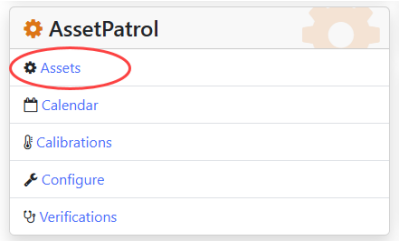
Note: The asset type settings are inherited by a new asset at the time the new asset is created. Changing an asset type setting thereafter does not alter assets that already exist.

Assets

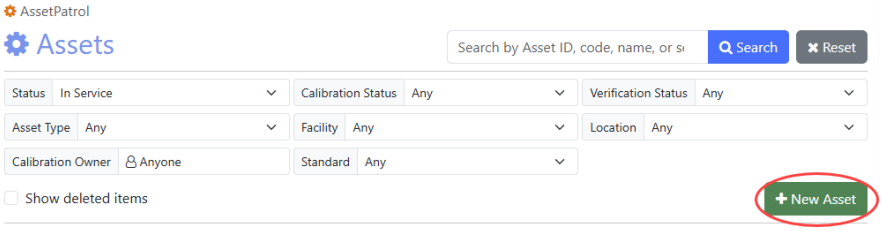
An asset is a single, specific, individually identifiable instrument that is used to measure or monitor the manufacturing process (process parameters) or the product itself (product characteristics).

13. Locate the AssetPatrol card on the PatrolSuite homepage and click **Assets.**

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14. Click the **New Asset** button.



15. Enter the asset information.
    a. **Code**. Enter a short identifier, unique across all assets, used to identify the asset. The asset code is often used to reference the asset number in a legacy system. For example: "`THERM-ARL-007`."
    b. **Name**. Enter a short name used to identify the asset. Names do not have to be unique – there can be twenty assets with the name "`Vaisala HMP110 Probe`."

        Note: Click the **Auto-generate** button to create the name using the information entered into the Manufacturer and Model fields.

    c. **Asset Type**. Select the applicable asset type. The calibration and verification settings will be immediately populated from the defaults defined in the chosen asset type.

        Note: Over time, the Asset Type settings can change. Click the **Apply Defaults** button to apply the then-current default settings defined in the Asset Type to the asset.

    d. **Status**. Select the status of the asset.
    e. **Is a Standard**. Check this checkbox if the asset is a controlled standard used to calibrate or verify other assets.
    f. **Description**. Enter a description of the asset.
    g. **Facility**. Select the facility where the asset resides.
    h. **Location**. Enter the location, within the facility, where the asset resides. Location is free text, so use whatever language the local users would say: a bench, a room, a line, etc.
    i. **Test Location**. If the asset is located at a test location as defined in QualityPatrol, choose the test location.
    j. **Calibration Owner**. Choose the person who is responsible for calibrating the asset. When a calibration comes due, the Calibration Owner will be assigned a task to recalibrate the asset (or to coordinate getting it recalibrated). The Calibration Owner is often a technician or maintenance person trained in equipment calibration.
    k. **Impact Owner**. Choose the person who is responsible for assessing the affected test results when an asset is found to be out of calibration. The Impact Owner is often a quality engineer or manager who can make product acceptance, rejection, and recall decisions.

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l. **Manufacturer**. Enter the name of the company who made the asset.

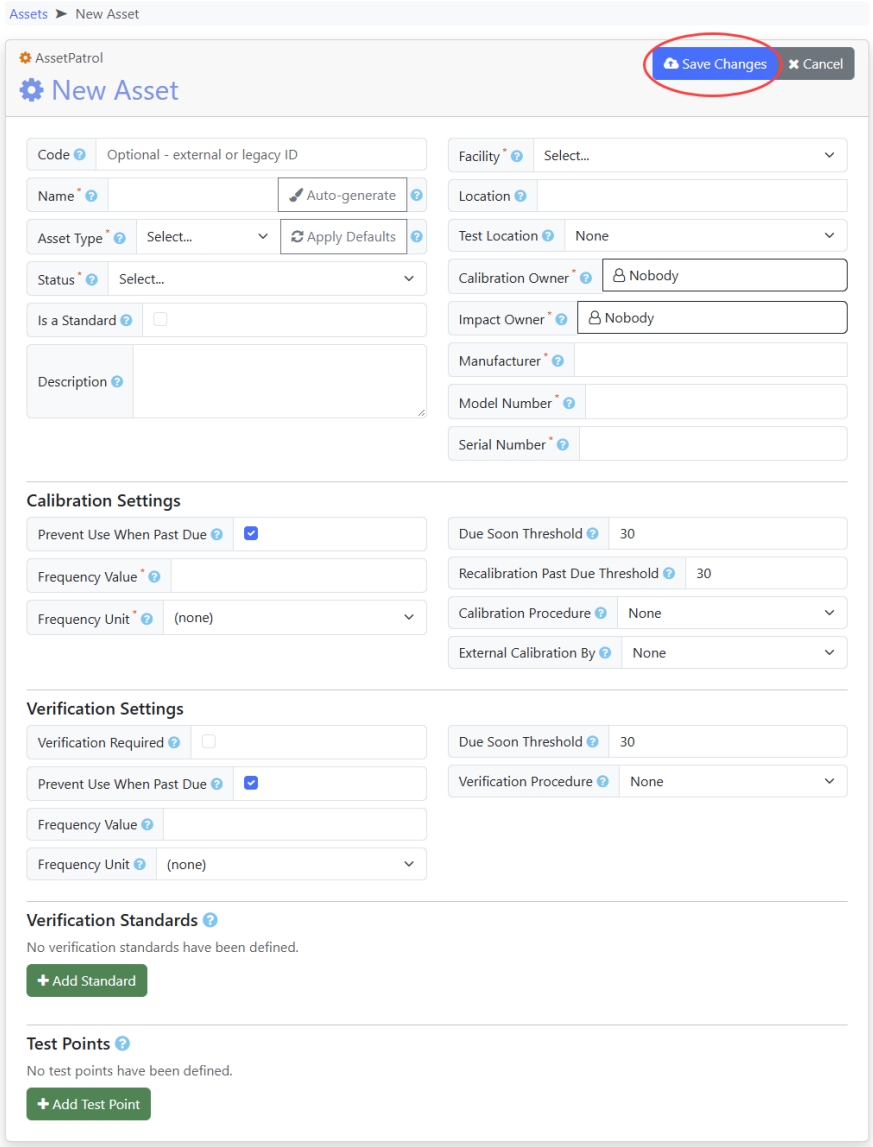
m. **Model Number**. Enter the model number of the asset.

n. **Serial Number**. Enter the serial number of the asset. This number is typically assigned by the Manufacturer.

Note: Be sure to choose **Calibration Owners** and **Impact Owners** who have access to the asset's facility.

Note: AssetPatrol automatically assigns each asset an asset number when the asset is created.

16. Check the **Calibration Settings** and **Verification Settings** that were inherited from the asset type, adjust anything specific to the instrument, and click **Save Changes**.



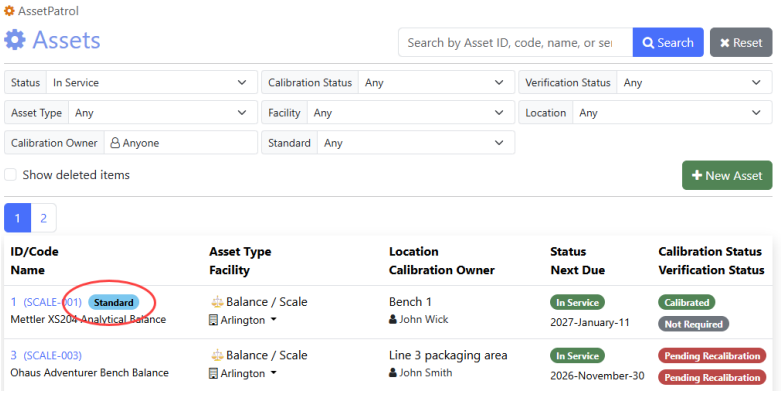
Note: Every asset needs a calibration **Frequency Value** and **Frequency Unit** (both are required on the asset, although they may be blank on the asset type).

Note: When **Verification Required** is checked, the verification Frequency Value and Frequency Unit are required, **and at least one Verification Standard must be listed**.

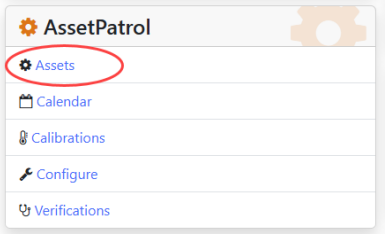
Note: An asset with **Is a Standard** checked can never require verification. Verification Required is turned off when it is saved.

Verification Standards

A verification standard is a controlled reference material or device with known characteristics used to calibrate or verify the calibration status of another asset. In AssetPatrol, a verification standard is an asset with **'Is a Standard'** selected. Verification standards are identified by the **Standard** label on the Assets search page.



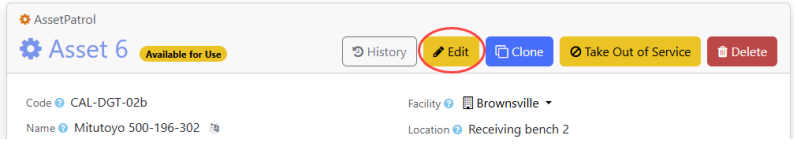
17. Repeat the steps in the foregoing Asset section to input the verification standards. Be sure to check the "**Is a Standard**" checkbox for each of these assets.
18. On the AssetPatrol card, click **Assets.**



19. Click the **asset hyperlink** to open the desired asset.

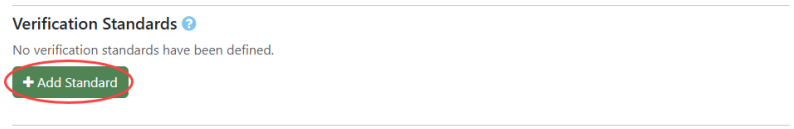


20. Click on the asset **Edit** button.

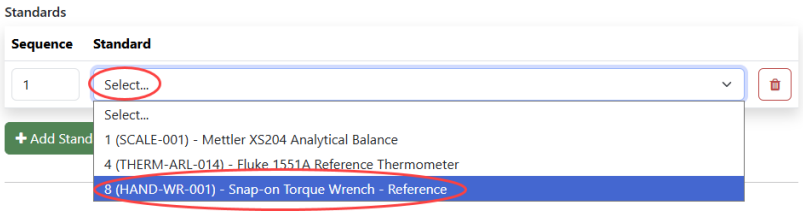


21. To document the standard material used to perform calibration verifications, click the **Add Standard** button.

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22. Click into the Select dropdown, select the desired standard, and click the **Save Changes** button.



Note: The dropdown is filtered to display only those standards for the facility to which the asset belongs. Accordingly, if the dropdown list is empty, then no standards have been defined for the asset's facility.

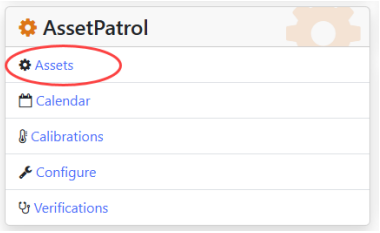
Note: The dropdown also omits retired and deleted standards, the asset itself, and any standard already listed on the asset.

Calibration Test Points

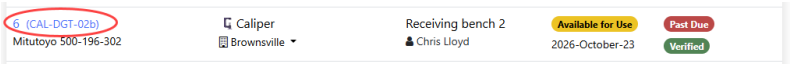
Calibration test points reflect an ordered list of named measurement points with specifications for the purpose of calibrating and verifying the calibration of an asset. For example, a *200 g check* and *1000 g check* on a balance.

Note: Assets can be calibrated without test points being defined. For assets without test points, the overall calibration result (Pass / Fail) is recorded rather than test point readings.

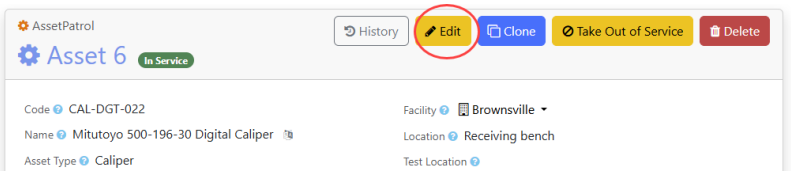
23. On the AssetPatrol card, click **Assets.**



24. Click the **asset hyperlink** to open the desired asset.

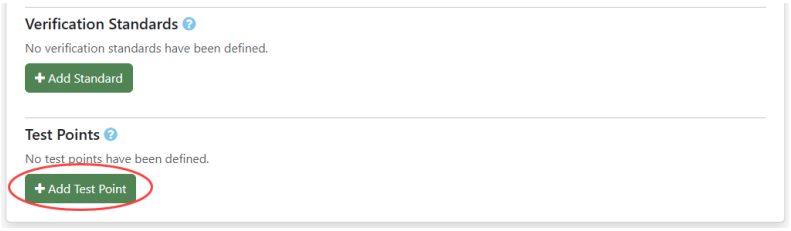


25. Click on the asset **Edit** button.

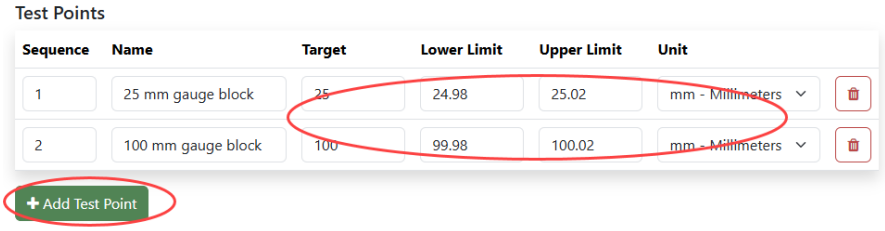


26. To define the test points that must be recorded when performing a calibration, click the **Add Test Point** button.

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27. Enter the test point name, target, spec limits, and units of measure, and click the **Save Changes** button.

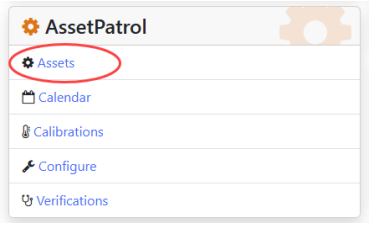


Note: Multiple test points can be added by clicking the Add Test Point button.

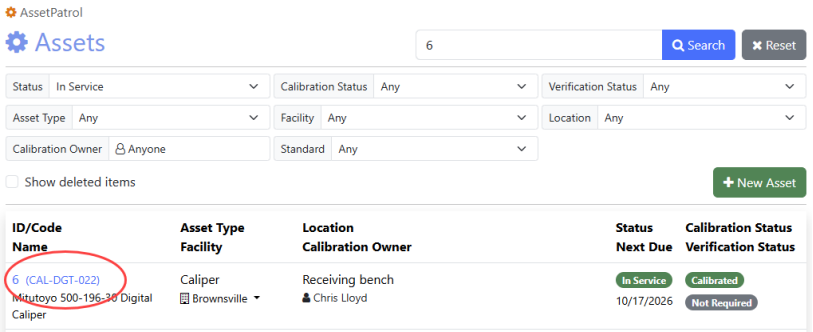
Asset Calibration

All assets that are used for quality-critical measurements should be calibrated before the asset is placed into service.

28. On the AssetPatrol card, click **Assets.**

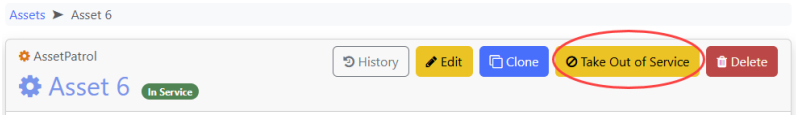


29. Click the **asset hyperlink** to open the desired asset.

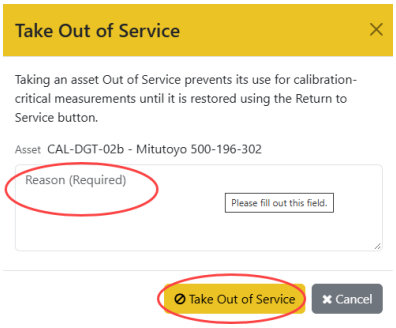


30. Click the **Take Out of Service** button to indicate that the asset is no longer in service. This will prevent using the asset to record test results in QualityPatrol.

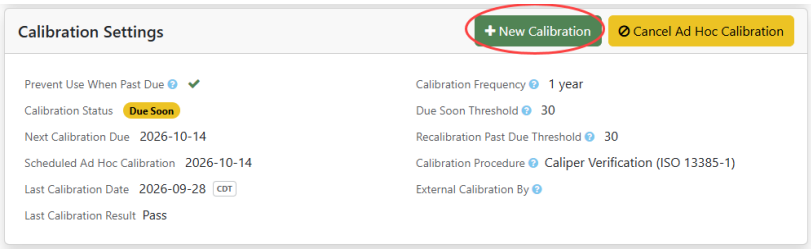
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a. Enter the reason for out of service (e.g. “Being calibrated”) and click the **Take Out of Service** button.



31. Scroll down to the Calibration Settings card and click the **New Calibration** button.



32. Record the calibration information and click **Save Changes**.

a. **Date Calibrated**. This will be auto populated with the current date/time. If the asset was calibrated before the current time, then click into the Date Calibrated date and time cells and edit to reflect the actual date/time the calibration was performed. The manually entered date cannot be in the future.

b. **As Found Result.** Indicates whether the asset met its calibration requirements (**Pass** or **Fail**) in its condition as found, before any calibration adjustments were made.

- If the asset does not have calibration Test Points, select Pass or Fail.
- If the asset has calibration Test Points, the As Found Result is automatically determined from the test point values entered.

Note: An As Found failure triggers an impact warning. The asset's Impact Owner reviews the warning and decides whether an impact assessment is required.

c. **After Calibration Result**. Indicates whether the asset met its calibration requirements (**Pass** or **Fail**) after calibration adjustments were made.

- If the asset does not have calibration Test Points, select Pass or Fail.
- If the asset has calibration Test Points, the After Calibration Result is automatically determined from the test point values entered.

d. **Notes**. Enter any additional information relevant to the calibration.

e. **Calibration Procedure**. If the asset has a pre-defined calibration procedure, then it is displayed here for reference.

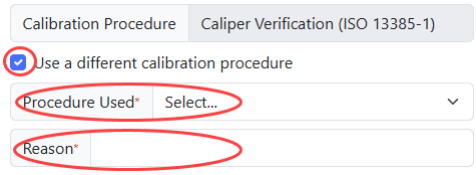
f. **Use a different calibration procedure**. Check the checkbox if the calibration was performed using a

procedure other than the prescribed calibration procedure.

Note: Only users with the **AssetPatrol Admin** permission can perform the calibration using a procedure other than the prescribed calibration procedure.

Note: It is shown only when there is another procedure to choose. If the asset type has an Allowed Calibration Procedures list, only those are offered.

Note: Procedure Used and Reason are both required once the box is checked.



i. **Procedure Used**. Select the procedure used to perform the calibration.

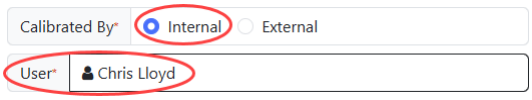
ii. **Reason**. If the calibration was performed using a procedure other than the one predefined for the asset, then enter the reason a different procedure was used.

g. **Procedure Version**. Enter the version of the procedure used to perform the calibration.

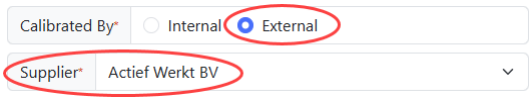
h. **Certificate Number**. If the calibration was performed by an external service provider, enter the calibration certificate number provided by the service provider.

i. **Calibrated By**. Select the radio button to indicate whether the calibration was performed **Internally** or **Externally** (by an external service provider).

- If performed Internally, then select the **User** who performed the calibration.



- If performed Externally, then select the name of the **Supplier** who performed the calibration.

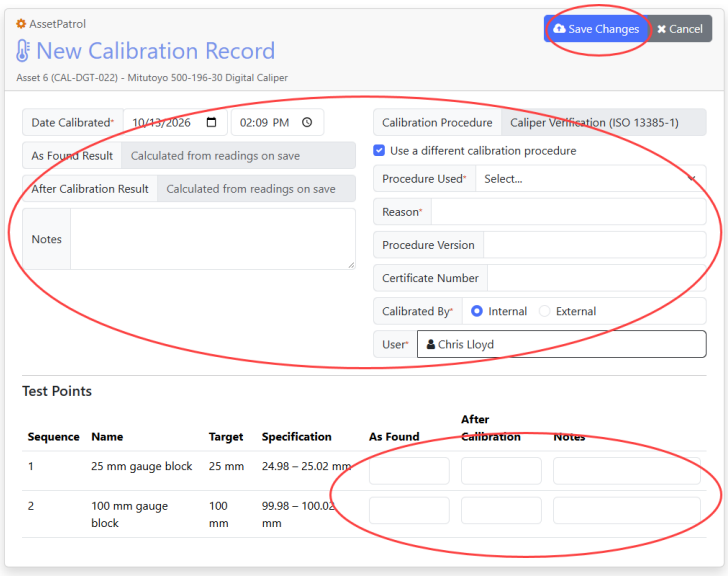


j. **Test Points**. Enter the As Found and After Calibration values for each Test Point. The target value and applicable specification limits are displayed for reference, making it clear whether each recorded value is within tolerance.

k. **Test Points Notes**. Enter any relevant information regarding the calibration results.

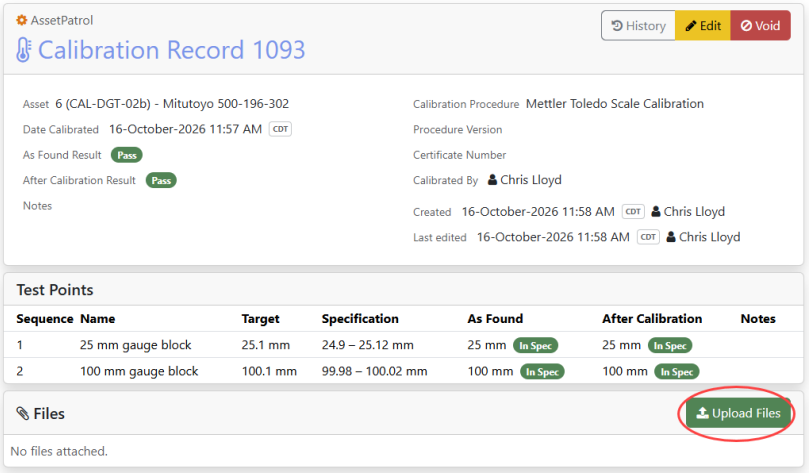
l. Click the **Save Changes** button.

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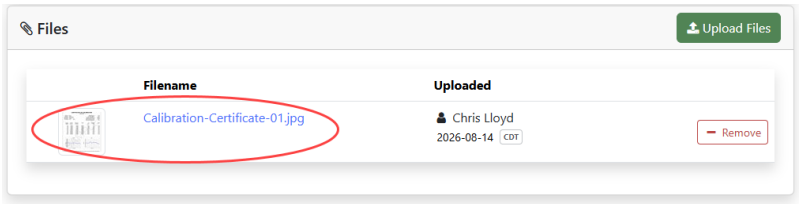


Note: When a successful (**Pass**) calibration record is saved, AssetPatrol automatically calculates the asset's next calibration due date based on its defined calibration frequency.

33. The saved calibration record will be displayed. To attach related files, such as a calibration certificate provided by an external service provider, click the **Upload Files** button.

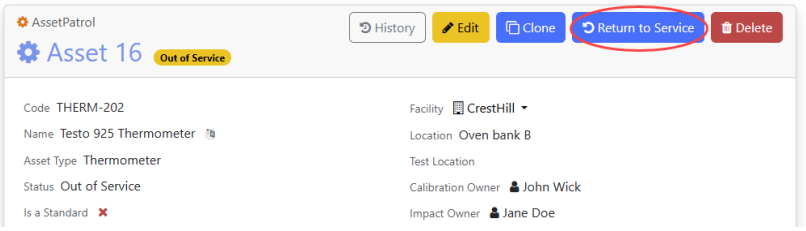


a. Select the desired file from your computer and click the **Open** button. The file will be displayed in the Files frame.

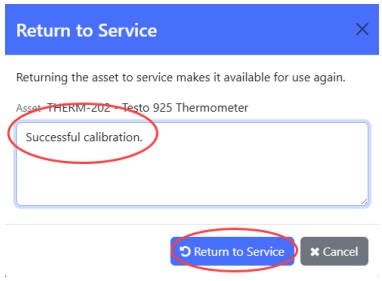


34. Click the **Return to Service** button.

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a. Enter the reason for the return to service and click the **Return to Service** button.



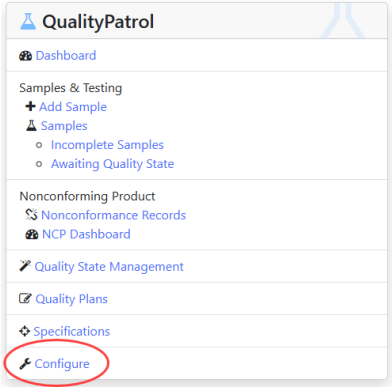
Identify the Calibration-Critical Test Methods

A QualityPatrol Administrator can designate test methods that must be performed using a calibrated asset. For a **calibration-critical** test method, QualityPatrol: (i) requires the user to identify the asset used to perform the measurement; and (ii) verifies that the asset is in an acceptable calibration state before test results can be saved.

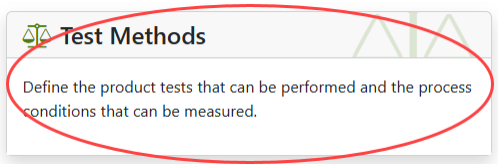
Note: Calibration-critical test methods are configured in QualityPatrol, not AssetPatrol.

The tasks in this section must be performed by a user with the **QualityPatrol Manage Test Methods** permission or the **QualityPatrol Admin** permission.

35. To identify a calibration-critical test method, locate the QualityPatrol card on the PatrolSuite homepage and click **Configure**.

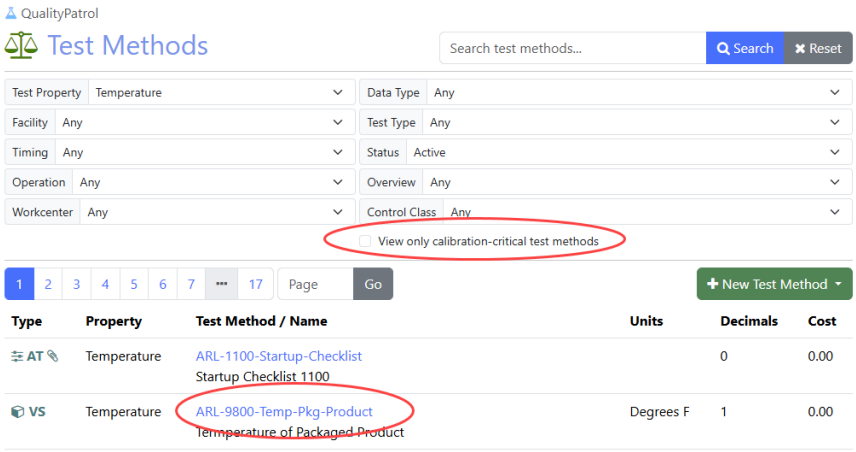


a. Click the **Test Methods** card.

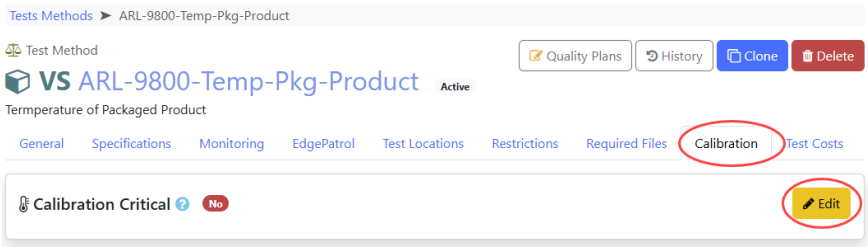


b. Use the filters to locate the desired test method and click on the **Test Method** hyperlink.

Note: Check the **View only calibration-critical test methods** checkbox to list only the test methods that require a calibrated asset.

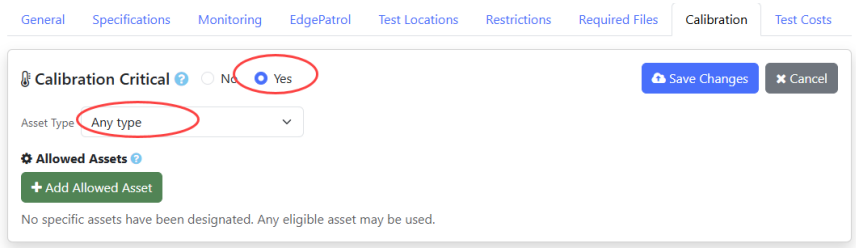


c. Click on the **Calibration** tab and then click the **Edit** button.



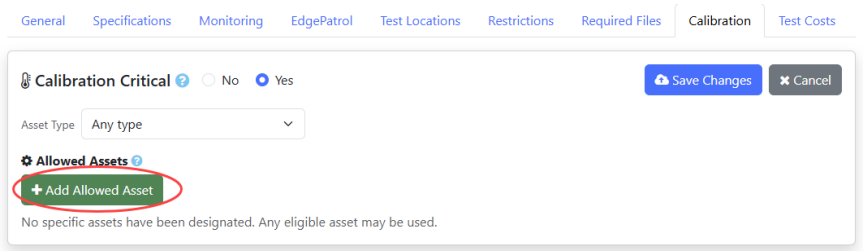
d. To identify the test method as calibration-critical, select the **Yes radio button**, then optionally select the applicable **Asset Type** that corresponds to the test method. The Asset Type limits the assets available for selection when QualityPatrol users identify the asset used to perform the test, making it easier to choose the correct asset.

Note: If the Asset Type is changed while allowed assets of another type are listed, a **Change Asset Type** dialog asks to **Continue**, which removes those assets.

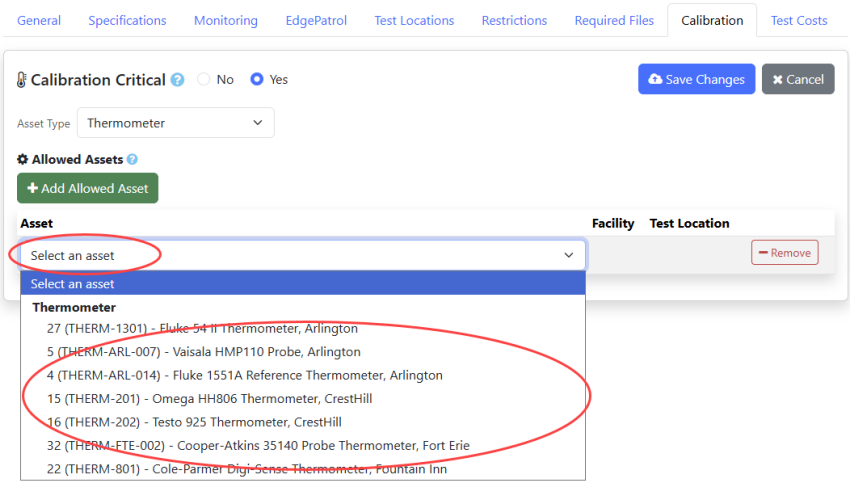


e. To restrict which assets can be used to perform this test, click **Add Allowed Asset** and select the applicable asset(s). If no Allowed Assets are specified, the person performing the test can

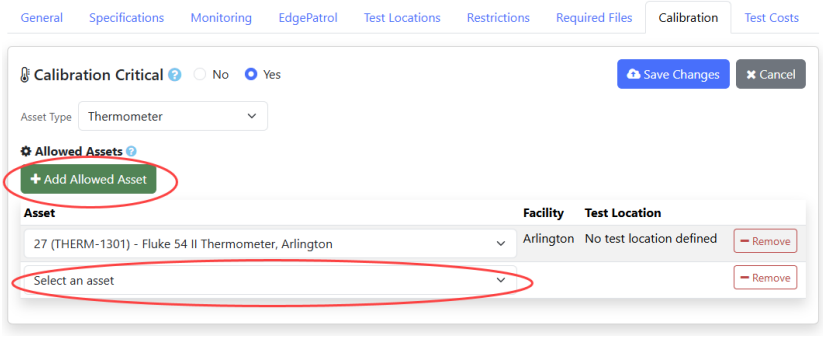
select any asset belonging to the applicable Asset Type.



i. Click on the **Select an asset** dropdown and select an asset from the list.

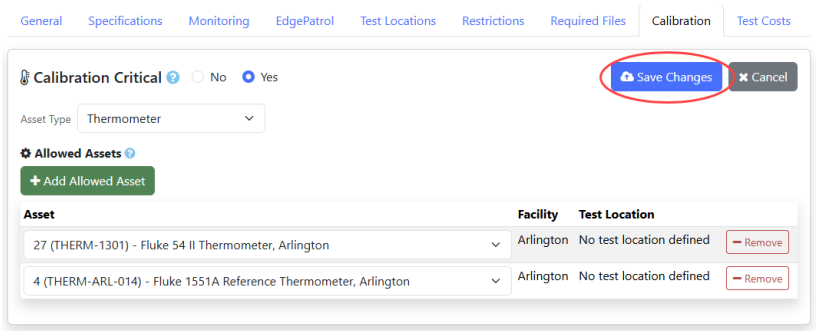


ii. To select another asset, click the **Add Allowed Asset** button, click on the **Select an asset** dropdown, and select another asset from the list.

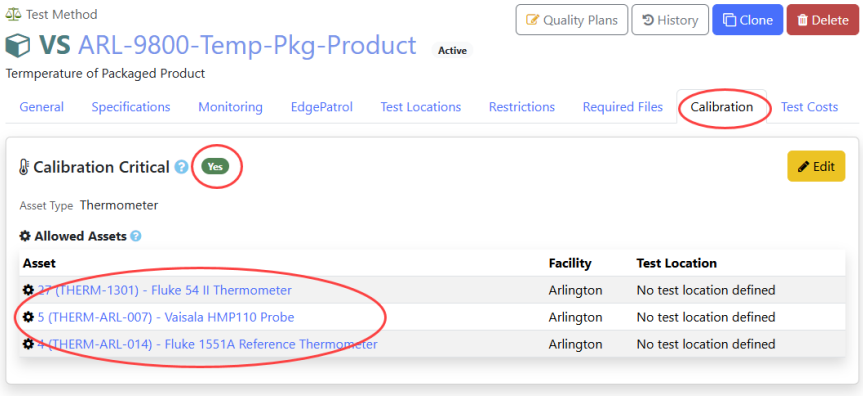


f. Click the **Save Changes** button.

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The assets that can be used to perform this test are displayed:



Note: The test method used in the above example is associated with the Arlington ("ARL") facility. To make it more efficient and less error-prone for the ARL users, the administrator defined the allowed assets to ensure that only the ARL assets would appear as options for the ARL users to select.

Note: If this test method were a "global" test method used by all, or more than one facility, then defining specific Allowed Assets may not add any value.

Performing Calibration-Critical Tests in QualityPatrol

Before results for a calibration-critical test method can be saved:

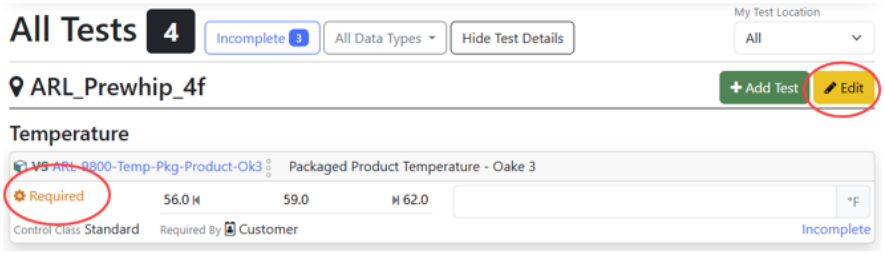
(i) The user must identify the asset used to perform the measurement; and

(ii) The asset must be in an acceptable calibration state.

The tasks in this section can only be performed by a user with the **QualityPatrol Test Enter Results** or the **Test Edit Results** permission.

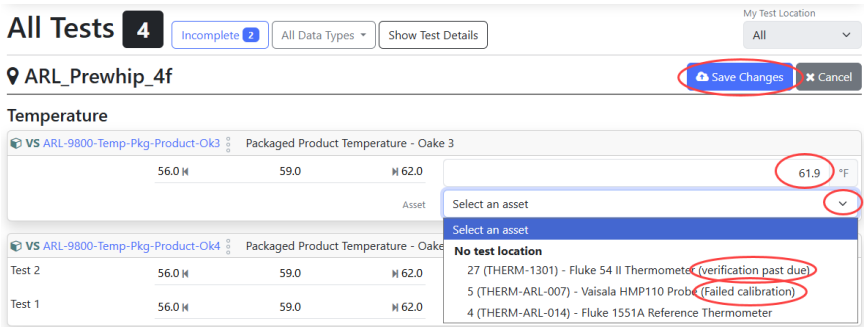
36. Initiate a QualityPatrol sample that contains a calibration-critical test method. Calibration-critical test methods will be identified with the Required label.

    a. Click the **Edit** button.

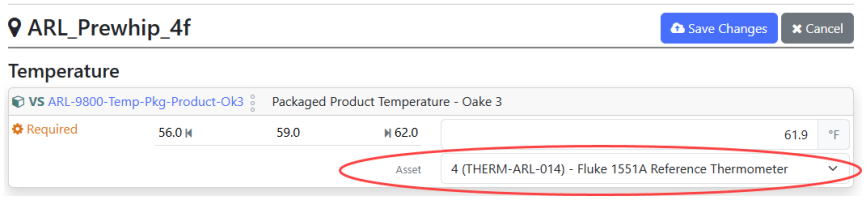


b. Enter the test result, select the asset used to perform the test, and click **Save Changes**.

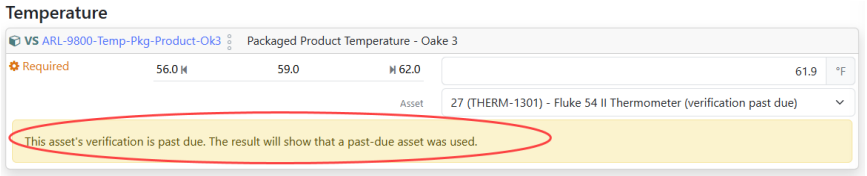
Note: The calibration or verification state is displayed in parentheses to the right of the instrument (see asset numbers 5 and 27 in the image below). The states are failed calibration, failed verification, not calibrated, calibration past due, verification past due, calibration due soon, and verification due soon. Out of Service and Retired assets are not listed.



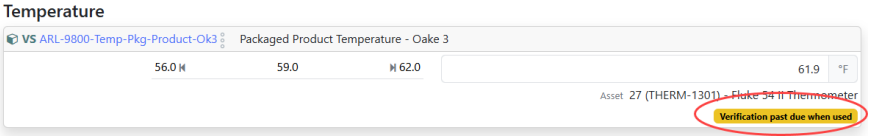
Note: If the asset is in an acceptable calibration state, no warnings will appear, and the asset used will be recorded when the test result is saved.



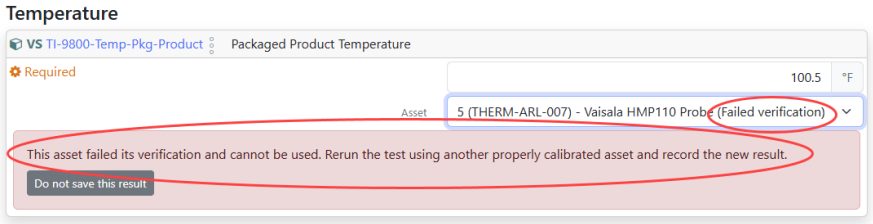
Note: If the asset's **calibration or verification is past due** and its **Prevent Use When Past Due** checkbox is not checked, then a warning appears, but the test result is allowed to be saved.



Such test results are marked with a "Calibration past due when used," "Verification past due when used," or "Calibration and verification past due when used" badge.



Note: If the asset is not in an acceptable calibration state due to: (i) **no calibration** (the asset has never been calibrated); (ii) **failed calibration**; (iii) **failed verification**; (iv) **calibration past due** with Prevent Use When Past Due checked; or (v) **verification past due** with Prevent Use When Past Due checked, then a warning message appears and a different asset must be used before the test result can be saved.



Note: For cases (iv) and (v) (past due with Prevent Use When Past Due checked), a user with the **Override Calibration Warning** permission will instead see the "This asset is past due for calibration" warning with **Save anyway** and **Do not save this result** buttons. Clicking the **Save anyway** displays "I acknowledge the asset is not in an acceptable calibration state and choose to save the test result anyway" and a **Justification (required)** box. The saved result carries the past-due badge, and the justification shows upon mouse-over.

More to Learn

37. See the *AssetPatrol User Guide* to learn additional functionality that is important to understand, including:
    - Understanding the asset statuses.
    - Understanding the difference between asset calibration and asset verification.
    - Defining asset verification procedures.
    - Implementing asset verification.
    - Understanding the effect of a failed calibration or verification.
    - Performing impact assessments.
    - Locating calibration and verification records.
    - Using the calibration calendar page.
    - How to initiate an ad-hoc calibration or verification ahead of the due date.
    - Understanding how AssetPatrol is integrated with the Task system.
    - How to edit, clone, retire and delete assets, and the audit history documenting each change.
    - Voiding records and what happens when a completed record is voided.
    - Understanding which records an impact review locks and voiding a failed record.
    - Understanding facility access and how it applies to assets and AssetPatrol records.

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