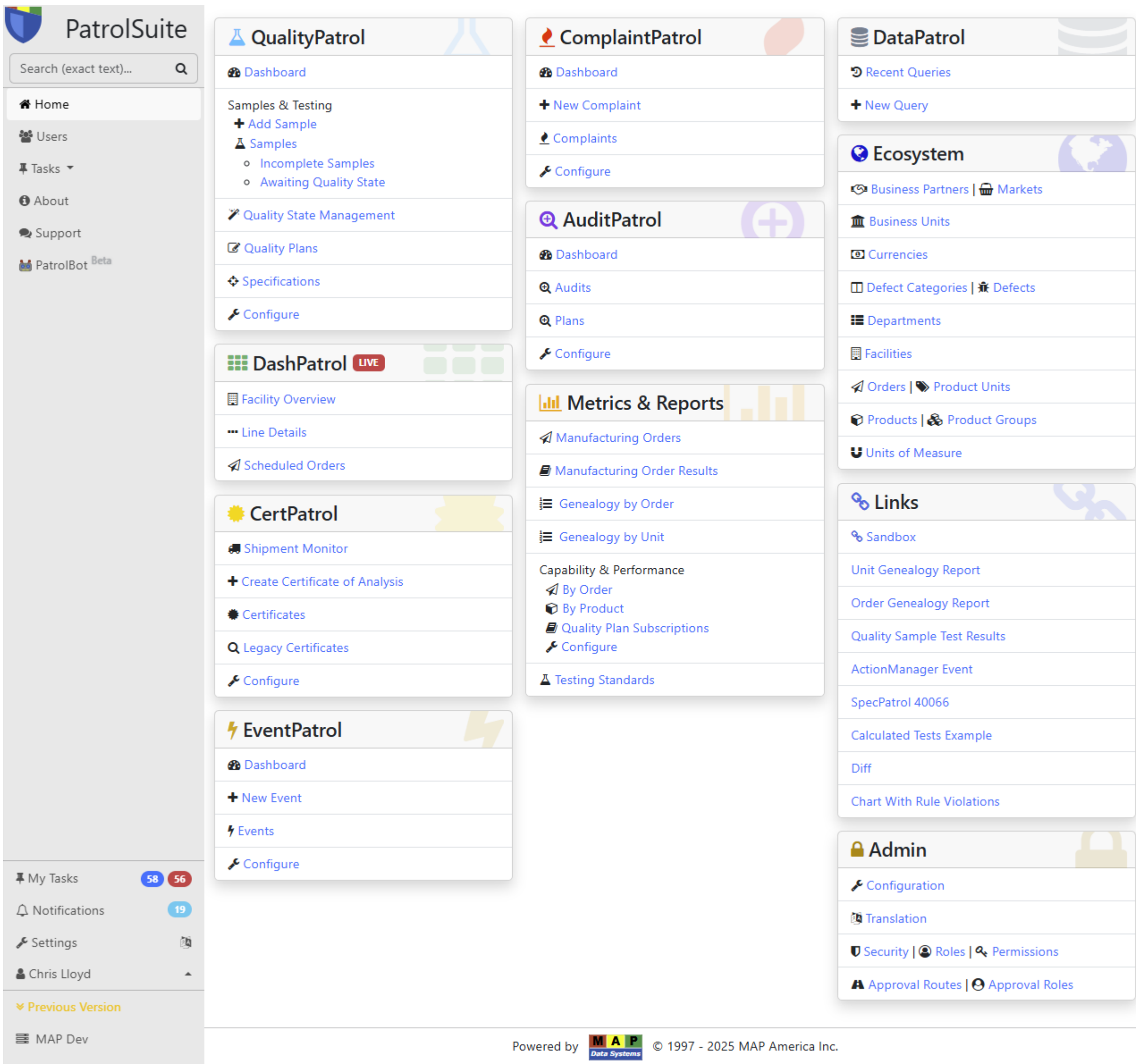
PatrolSuite
User Guide
Version 2025-10



Contents

Chapter 1: Introduction

Introduction

PatrolSuite™ is the technology platform for MAP's web-based Quality Management System (QMS). The PatrolSuite homepage provides navigation to all modules of the QMS, and to the administrative features which enable administrators to maintain the website, the web server, and the security that governs user access to appropriate pages of the website.

This user guide is technical in nature. Accordingly (with the exception of the chapter regarding Notifications), it is aimed at a technical audience with the responsibility for maintaining the web server, the website, the global configuration settings (including translations), and the corresponding user access security, roles, and permissions.

Access

To access the PatrolSuite homepage, obtain the URL and login credentials from your IT department.

PatrolSuite module access is governed by both PatrolSuite and Active Directory security protocols. Therefore, users will see different homepage content and will have different access levels based on assigned roles. For assistance with security or permissions, contact your IT department.

Browser

PatrolSuite™ is accessed through a web browser. The platform and all its applications are certified for use with Google Chrome, Microsoft Edge, and Safari. To ensure full functionality and the best user experience, MAP strongly recommends using one of these supported browsers.

NEW Definitions

Business Partner – Customers and Suppliers.

Business Unit – Grouping of manufacturing facilities according to the market to which their products are sold.

Comprehensive Testing – This QualityPatrol feature helps to ensure that all tests are performed when samples are created. If an administrator has turned comprehensive testing "on" for a given test location, then all test results must be recorded before the user is allowed to save/close the edit test results window.

Cost of Quality (CoQ) – The total cost of ensuring and maintaining product quality. It includes all costs involved in preventing defects, appraising product quality, and dealing with failures. CoQ is divided into four categories:

1. Prevention Costs (Quality Assurance)
   - Costs to prevent defects before they happen such as training, process design, quality planning, policy and procedure documentation, and preventive maintenance.
2. Appraisal Costs (Quality Control)
   - Costs of measuring and monitoring product quality such as product inspection and testing, audits, calibration of instruments, statistical process control (SPC).
3. Internal Failure Costs (Nonconforming Product)
   - Costs of defects **found before** the product reaches the customer such as scrap, rework, downtime, re-inspection.
4. External Failure Costs (Customer Complaints)
   - Costs of defects **found after** the product is delivered to the customer such as customer complaints, warranty claims, returns, product recalls, loss of reputation.

Cost of Poor Quality (CoPQ) – Avoidable costs that result from delivering a substandard product or service. CoPQ = Internal Failure Costs + External Failure Costs. Accordingly, CoPQ is a subset of the CoQ often referred to as “the cost incurred when things go wrong.”

Currency – A system of money in common use within a particular country or economic region, used as a medium of exchange, store of value, and unit of account in financial transactions.

Defect – Flaws, faults, or deviations in a manufactured item that prevent it from meeting design specifications, quality standards, or customer expectations.

Defect Category – Grouping of defects to help identify, analyze, and correct issues systematically. Common defect categories include:

- Aesthetic or Cosmetic Defects - Visual imperfections that do not affect the product’s functionality but can impact customer perception and marketability.
- Design Defects - Flaws inherent in the product's design that make it unsafe, ineffective, or prone to failure, even if manufactured perfectly.
- Documentation/Labeling Defects - Inaccurate or missing product information, which may lead to misuse, safety issues, or regulatory non-compliance.
- Functional Defects - The product does not perform as intended or fails under specific conditions.
- Manufacturing Defects - Flaws introduced during the production or assembly process, even when the design is correct.
- Material Defects - Deficiencies in raw materials or components that affect product performance, safety, or durability.
- Packaging Defects - Issues related to how the product is packaged for shipping, storage, or display.
- Process Defects - Defects caused by errors in the manufacturing process settings, procedures, or conditions.

Department – An organized unit within a company that is responsible for managing a specific set of functions, processes, or activities that contribute to the organization’s overall goals and operations.

Disposition – The remediation instructions assigned to a product with a rejected quality state. The goal of the remediation is to minimize the financial loss due to making product that does not meet quality requirements.

Enterprise Resource Planning (ERP) – Software system that enables management of the day-to-day business activities such as accounting/finance, procurement, supply chain, human resources, sales order conversion to manufacturing orders, distribution, project management, compliance, and others.

Facility – A physical location where raw materials are converted into finished or semi-finished products through various production processes, machinery, labor, and technology.

Manufacturing Execution System (MES) – Software system that tracks and documents the transformation of raw materials into finished goods, including inventory consumption and product genealogy. In a world class manufacturing environment, the MES is integrated to communicate bi-directionally with the ERP and the Quality System (PatrolSuite).

Market ("Customer Market") – Groups of consumers that a company targets to sell its products or services, based on shared needs, characteristics, or behaviors. These markets help companies focus their marketing, product development, and sales strategies by understanding who their customers are and what they need.

Operation – Location where a sample originates for which testing is performed.

Order – A unique number (typically originating from the MES or ERP) that identifies a:
- Inbound Receiving order (often a "purchase order") for raw materials
- Manufacturing order and its related product and customer
- Outbound Shipping order for finished goods being shipped to customers

Product – A tangible output or item that is created through a controlled process involving raw materials, labor, machinery, and other inputs, intended for use, sale, or further processing. Types of products include:
- Finished Goods: Ready for sale to end users (e.g. computers, bicycles, paper).
- Semi-Finished Goods: Used as components in other products (e.g. engine parts, circuit boards).
- Raw Materials: Basic inputs for production (e.g., glue, steel, plastic pellets, lumber).

Product Group – A collection of related products that share common characteristics, functions, markets, manufacturing processes, or branding, and are managed together for strategic, operational, or marketing purposes.

Quality Assurance (QA) – A proactive process that focuses on preventing defects by ensuring that the processes used to manage and create deliverables are effective and followed correctly.
- Focus: Process-oriented
- Goal: Prevent defects before they happen
- When: Throughout the product development and prior to the manufacturing process
- Methods: Process audits, training, standard operating procedures (SOPs), continuous improvement
- Responsibility: Business management, quality management, and process engineers

Quality Control (QC) – A reactive process that focuses on identifying defects in the finished product through inspection and testing.
- Focus: Product-oriented
- Goal: Detect and fix defects after they occur
- When: After production or at specific checkpoints during production
- Methods: Inspections, measurements, product testing, sampling, statistical process control (SPC)
- Responsibility: Laboratory technicians, quality inspectors, or testing personnel

Quality Plan – A formal set of electronic files or settings that define the specific quality practices, resources, standards, procedures, responsibilities, and inspection or testing methods to be applied to a particular product or process during manufacturing.

Quality State – The assessment of a sample's conformance to quality requirements. For example, a sample for which all tests are completed, and all are in spec, might have a quality state of "Approved."

Raw Material – A basic, unprocessed, or minimally processed substance that is used as the starting input in the production or manufacturing of goods and products.

Reasonable Data Limit (RDL) – The range in which all test results would normally be expected to fall. If an RDL is defined and a test result is entered that exceeds the RDL, then QualityPatrol will provide a warning.

Sample – A QualityPatrol record reflecting a point in time at which product characteristics (i.e. test results) or process parameters (i.e. process conditions) are recorded. Samples are related to the Operation and Workcenter where they are being manufactured.

Sample Status "Incomplete" – A sample that has one or more data yet to be collected. For example, if a Sample requires 5 tests to be performed, but only 4 tests have been completed, then the sample is incomplete.

Sample Status "Completed" – A sample for which all tests are completed. Note that complete/incomplete has nothing to do with whether the results are in spec or out of spec.

Sample Location – A physical location on a single sample from which tests are performed for X-bar testing.

Sample Type "Start Up" – Identifies a sample of product that is not intended to be sold to a customer or used in further processing. Use Case: When a manufacturing line begins producing "Product 123," the first few samples are identified as Start Up and are used to determine when the product meets quality requirements. Once quality requirements are met, then the next sample is identified with the sample type "Production." Note: Start Up samples are typically omitted from statistical analysis (DataPatrol & DashPatrol).

Sample Type "Production" – Identifies a sample of product that is expected to meet quality requirements and be sold to a customer or used in further processing.

Specification Limit – The product measurements within which confirm the acceptability of a product, or the process conditions within which likely result in the production of acceptable product. Product specification limits are typically defined by the customer. Process specification limits are typically defined by the manufacturer.

Specification Limit "Upper" – The highest value that a test result can be and still be considered acceptable to the customer.

Specification Limit "Lower" – The lowest value that a test result can be and still be considered acceptable to the customer.

Test Location – A physical location within the Facility where tests are completed.

Unit – The smallest measurable or sellable quantity of a product. Units are typically used for production, inventory, pricing, sales, and distribution purposes.

Unit of Measure – A standard quantitative unit used to specify, track, and manage the amount of a product, material, or resource in the manufacturing, inventory, sales, or procurement processes.

Warning Limit – A numerical value that, when exceeded, raises a flag prompting a timely, proactive response to eliminate or minimize the possibility of the parameter from reaching an alarm limit such as a specification.

Workcenter – A sub-division of an Operation. An Operation can have one or more Workcenters. Often, a workcenter reflects a unique manufacturing machine or asset.

Symbol Key

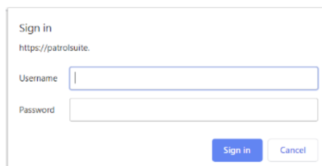
The following symbols are used in this user guide.

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

Chapter 2: Homepage

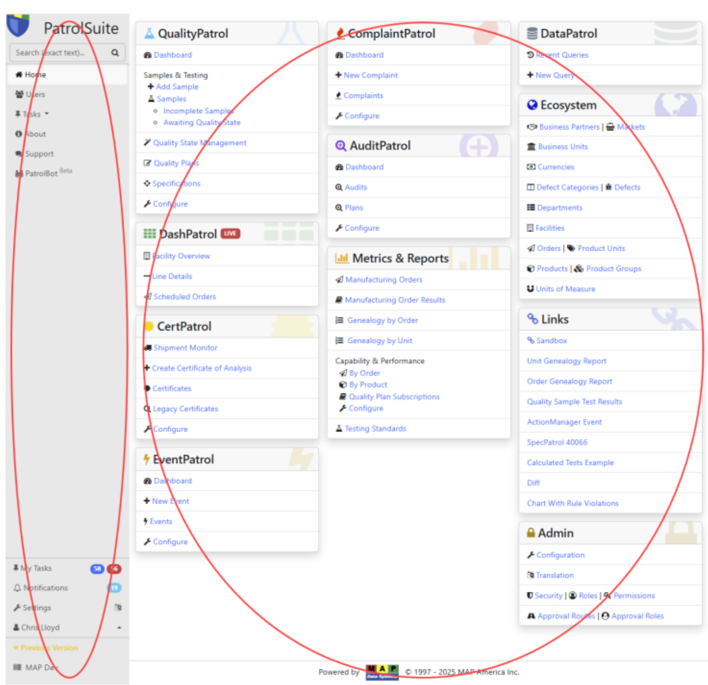
NEW Layout and Navigation

1. Contact your IT or Quality department to obtain the PatrolSuite URL. Open a browser and navigate to the PatrolSuite homepage. Logon using your Username and Password (typically your network login credentials).



2. The PatrolSuite homepage is organized into two sections:
   a. The navigation menu. Depending on user preferences, this menu may appear on the left or the top of the homepage. Click on the PatrolSuite logo at any time to return to the PatrolSuite homepage.
   b. The body. This section contains cards with hyperlinks to the modules and related pages of PatrolSuite. See the module user guide for information regarding a module of interest.

   Note: A user's homepage will look different depending on the user's permissions to view modules.



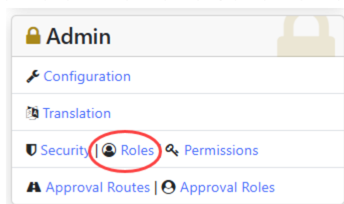
Chapter 3: Security

System Administrators

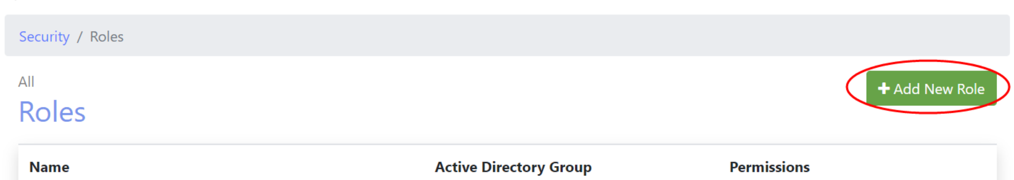
3. Identify the PatrolSuite Administrator (and his/her backup) who will have the responsibility for managing the PatrolSuite website and for providing technical support to PatrolSuite users. This person is typically an advanced user from the IT department with experience and expertise managing websites (IIS), networks, databases, and security (Microsoft Active Directory). Additionally, the PatrolSuite Admins will work with MAP to coordinate software version release updates as they become available.

4. Create an Active Directory group with an appropriate name (such as “PatrolSuite Systems Admins”) and place appropriate users into the group. Extreme caution should be given when making decisions regarding users who will be placed into the “PatrolSuite System Admins” Active Directory group and, subsequently, placed into a corresponding PatrolSuite role with admin frame permissions granted.

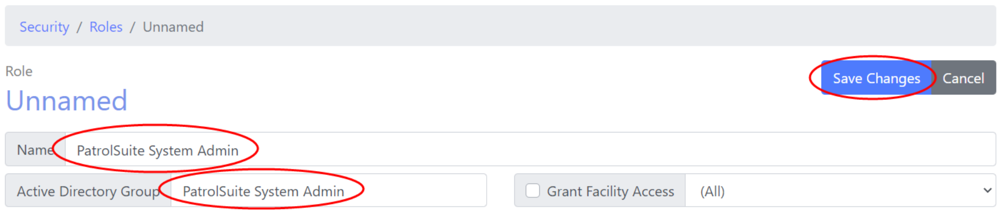
5. To create the “PatrolSuite Systems Admin” role and define the corresponding permissions, click on the ‘Roles’ hyperlink within the Admin frame on the PatrolSuite homepage.



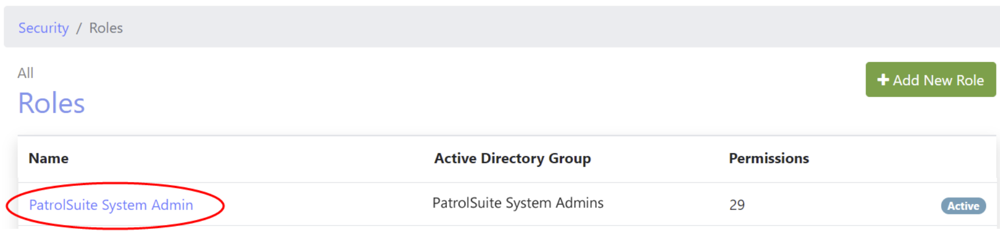
   a. If the “PatrolSuite Systems Admin” role has not been previously setup, click on the ‘Add New Role’ button.



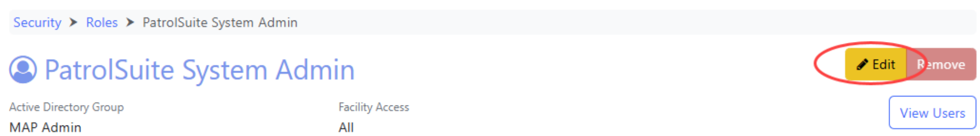
   b. Enter the name of the PatrolSuite role (“PatrolSuite Systems Admin”).
   c. Enter the name of the corresponding Active Directory group (e.g. “PatrolSuite Systems Admin”).
   d. Optionally (and recommended for this role), check the Grant Facility Access checkbox with “All” selected in the dropdown. By doing so, system admins will have access to PatrolSuite data related to all facilities, which will facilitate efficient support and troubleshooting across the corporation. While the Grant Facility Access settings are currently saved to the role, this does not yet impact data access throughout PatrolSuite. This functionality will come in a future software version release.
   e. Click the ‘Save Changes’ button.



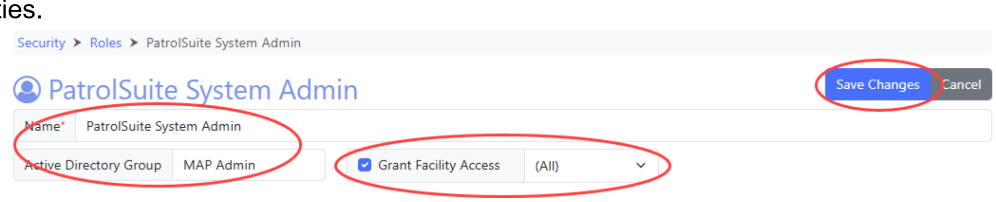
6. The new role will appear in the list of Roles. To open and edit the Role Permissions page, click on the ‘PatrolSuite Systems Admin’ hyperlink.



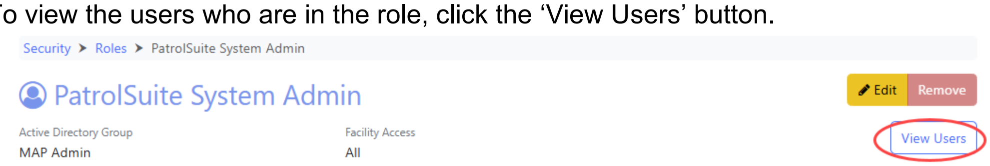
   a. Click on the ‘Edit’ button.



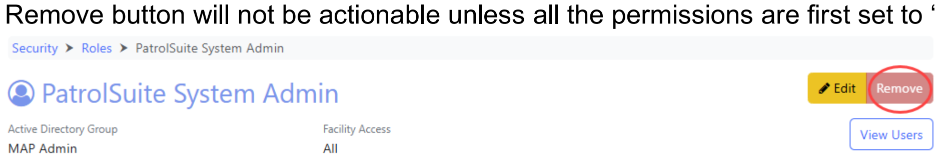
   b. Edit the name and the Active Directory Group, and Facility Access as desired and click the ‘Save Changes’ button. Typically, the PatrolSuite System Admins are granted access to data from all facilities.



7. NEW To view the users who are in the role, click the ‘View Users’ button.

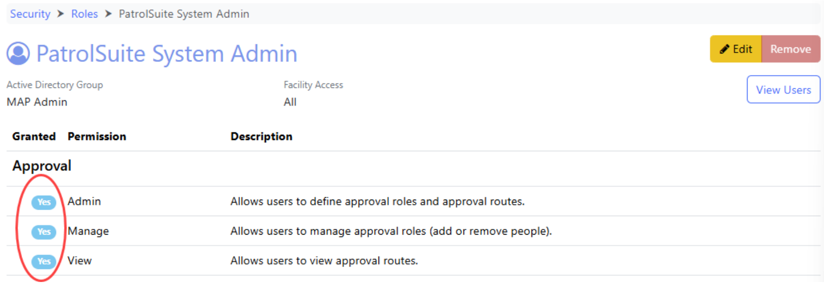


8. To delete a role, on the ‘Remove’ button.
   Note: The Remove button will not be actionable unless all the permissions are first set to ‘No.’



9. The Role Permissions page displays a list of the PatrolSuite permissions that can be granted to users in the applicable role. Click on the ‘Yes/No’ button for each permission to grant (Yes) or deny (No) the

corresponding permission. Typically, the System Admins are granted all “View” permissions and all functional permissions by module so that they may perform troubleshooting activities.

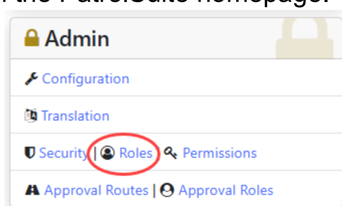


Note: Permissions are cumulative. A permission granted to a user in “Role A” will remain granted if the user is also in “Role B” which does not grant the same permission.

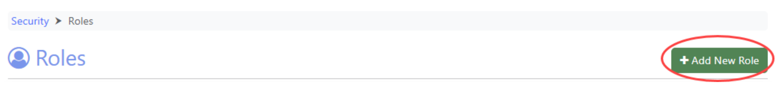
Users

This section creates the role that provides users access to the PatrolSuite homepage.

10. To create the “PatrolSuite Users” role (assuming it has not previously been created), click on the ‘Roles’ hyperlink within the Admin frame on the PatrolSuite homepage.

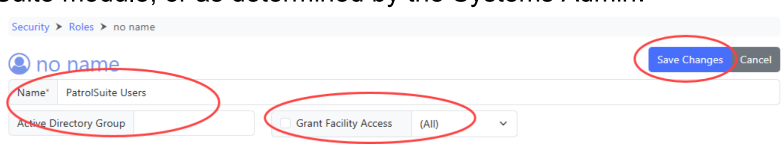


 a. Click on the ‘Add New Role’ button.

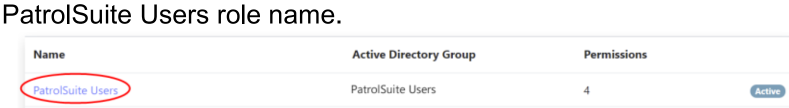


 b. Enter the role name and Active Directory group and Facility Access and click the ‘Save Changes’ button.

 Note: Typically, Facility Access is not defined for this group. Facility Access is defined for roles related to each PatrolSuite module, or as determined by the Systems Admin.



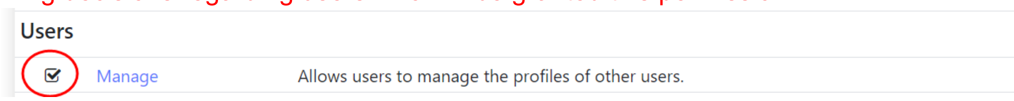
 c. Click on the PatrolSuite Users role name.



11. Click on the ‘Yes/No’ button for each permission to grant (Yes) or deny (No) the corresponding permission. Typically, the PatrolSuite Users are granted all of the “View” permissions with the following exceptions:
 a. Archiving View

b. Configuration View
c. Diagnostics View
d. General Version Link

Note: A user with User/Manage permission can edit any user's profile. Extreme caution should be given when making decisions regarding users who will be granted this permission.

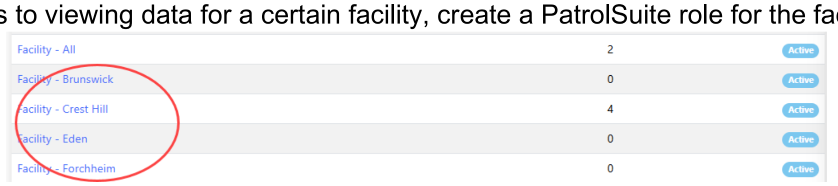


NEW Security by Module

The recommended roles and permissions for each PatrolSuite module are defined in the corresponding user guides.

NEW Facility Security

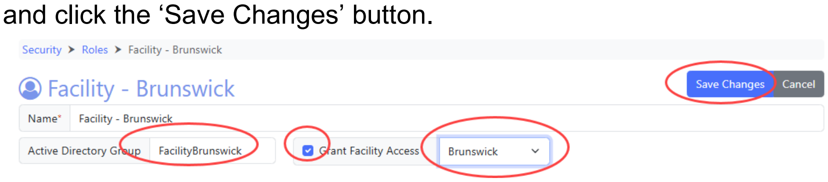
12. To restrict users to viewing data for a certain facility, create a PatrolSuite role for the facility.



a. Create an Active Directory group with a corresponding name for the facility.
b. Provide the list of users who need to be in this group to the IT department.
c. On the PatrolSuite Roles page, click on the desired role name.

d. Click on the 'Edit' button.

e. Enter the Active Directory group name, click the Grant Facility Access checkbox, select the fain the dropdown, and click the 'Save Changes' button.



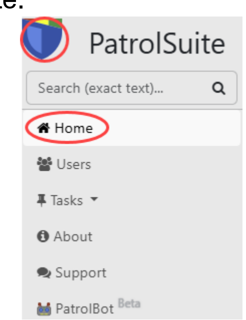
All users in this PatrolSuite role (and corresponding Active Directory Group) will now only be able to view PatrolSuite data related to the applicable facility.

Chapter 4: PatrolSuite Search

Homepage Navigation

13. To return to the PatrolSuite homepage, click on the PatrolSuite logo or the 'Home' hyperlink.

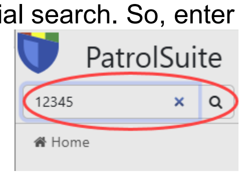
    Note: Except for the server diagnostics hyperlink (covered in a subsequent chapter), there are no security/permissions to control access to the menu bar hyperlinks; these hyperlinks are available to any user who can access PatrolSuite.



NEW Search

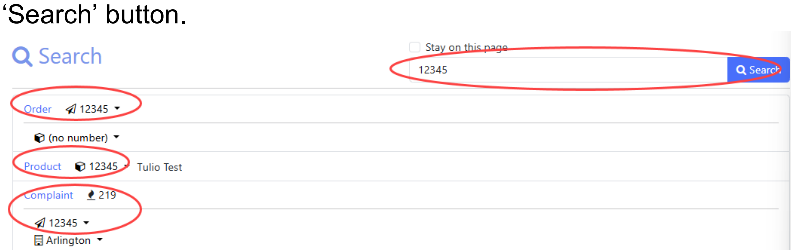
14. To search for content in PatrolSuite, enter the text into the Seach bar and click the search icon or hit 'Enter' on the keyboard.

    Note: This is an exact search, not a partial search. So, enter names and numerical values in full.



PatrolSuite will return matching content.

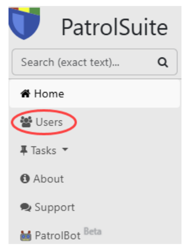
15. Click on the hyperlink to navigate to the desired information, or enter new search criteria into the search bar and click the 'Search' button.



Chapter 5: User Information

User Search

16. To search for and to view the profile page of a PatrolSuite user, click on the 'Users' hyperlink.

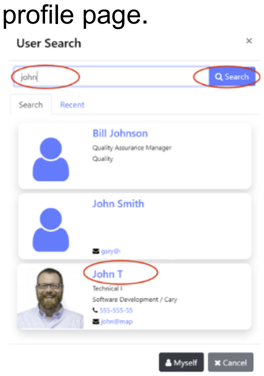


Note: This function can be performed only by users in a role that grants the following permission.

Users

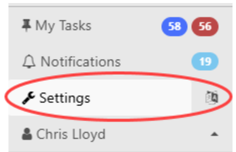
No	Edit Own Profile	Allows users to edit their own profile.
No	Manage	Allows users to edit the profile of other users. This permission is typically granted only to System Admins.
Yes	Search	Allows users to view the Search hyperlink in the PatrolSuite main menu, and to search for, and to view the profile of, other users.

a. Enter the user's name (partial text is supported) and click the 'Search' button. A list of users meeting the criteria is displayed. Click on the desired user's name to access the user's profile page. Click the 'Myself' button to access your own profile page.

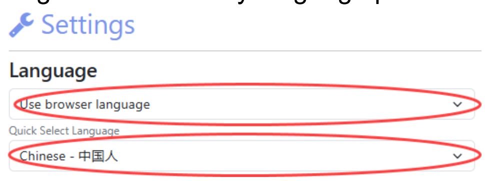


NEW User Settings

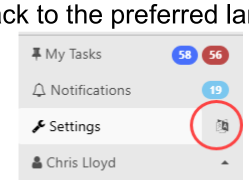
17. Click on the 'Settings' hyperlink to your PatrolSuite settings.



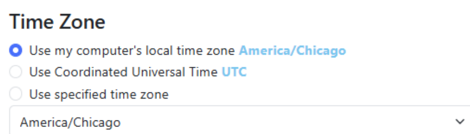
a. **Language**: Click the dropdown and choose the desired language in which the browser will display all PatrolSuite pages. This setting will override any language preferences defined in the browser.



b. **Quick Select Language**: Select the language that PatrolSuite will display when the Quick Select icon is clicked. Click the icon to revert back to the preferred language.

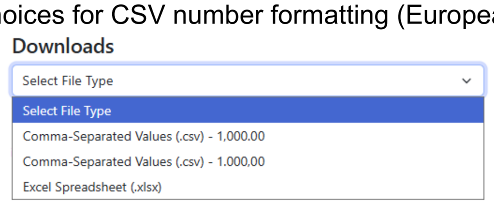


c. **Time Zone**: Choose the desired radio button to define the time zone in which data is displayed within PatrolSuite.

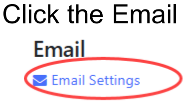


d. **Downloads**: Click the dropdown and choose the default format for data downloads.

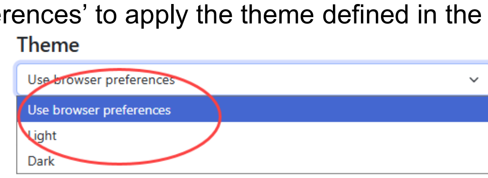
Note: The two different choices for CSV number formatting (European and US).



e. NEW **Email Settings**: Click the Email Settings hyperlink to define your My Tasks email preferences.



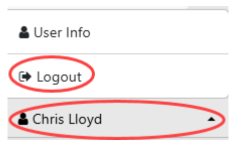
f. **Theme**: Click the dropdown and choose the desired color theme to apply to all PatrolSuite pages. Choose 'Use browser preferences' to apply the theme defined in the browser.



g. **Navigation Bar**: Select the desired settings for the PatrolSuite navigation bar.

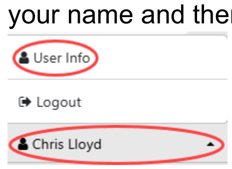
NEW User Logout

18. To logout of PatrolSuite, click on your name and then click on the Logout hyperlink.

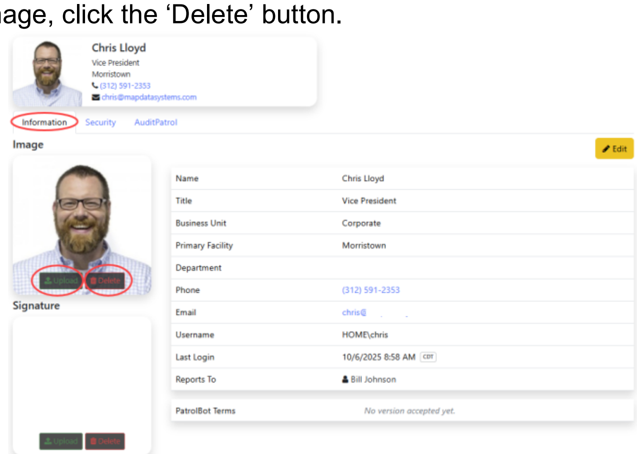


NEW User Profile – Information Tab

19. To access your user information, click on your name and then click on the User Info hyperlink.

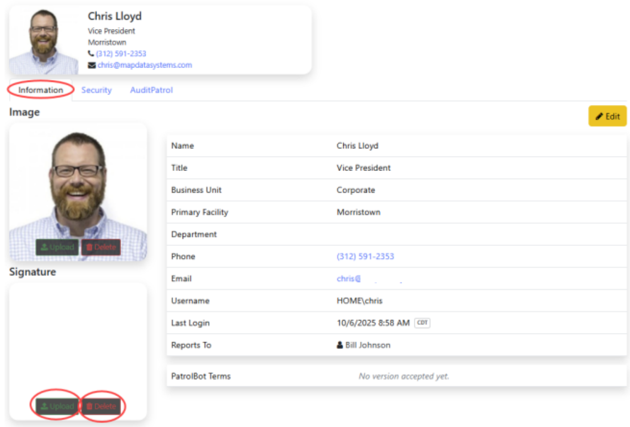


20. To upload a user picture, click on the Image Upload icon, select a profile image, and click the 'Open' button.
    a. To delete an image, click the 'Delete' button.

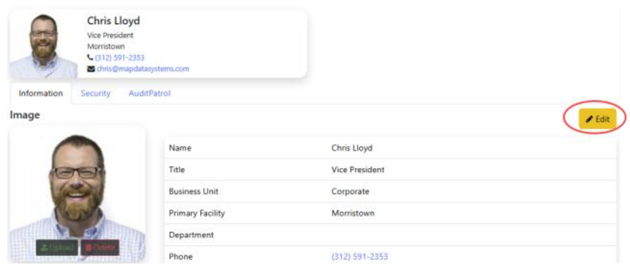


21. To upload a signature image, click on the Signature Upload icon, select a signature image, and click the 'Open' button.
    a. To delete a signature, click the 'Delete' button.

Note: A user's signature is used in PatrolSuite modules where a signature is required such as CertPatrol.



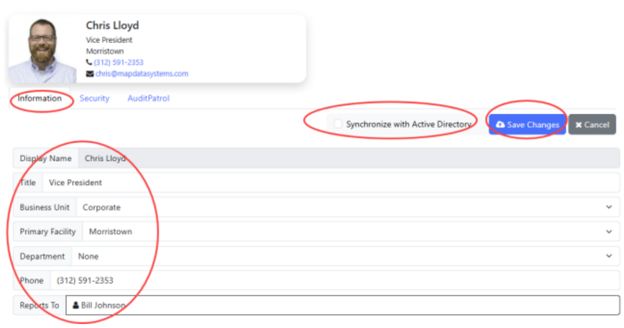
22. To edit your profile information, click on the ‘Edit’ button.



23. Edit your information as appropriate and click the ‘Save Changes’ button.

    Note: Click on the ‘Synchronize with Active Directory’ checkbox to synchronize your information with Active Directory. Uncheck this checkbox to enter user information manually.

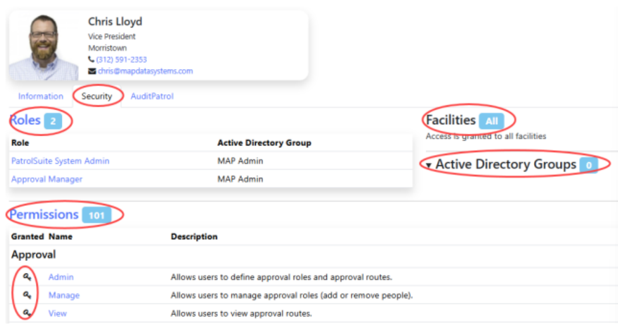
    Note: Click ‘Reports To’ and select the person to whom you directly report. Defining a user’s ‘Reports To’ is very important because the My Tasks page allows users to view tasks assigned to direct reports.



NEW User Profile – Security Tab

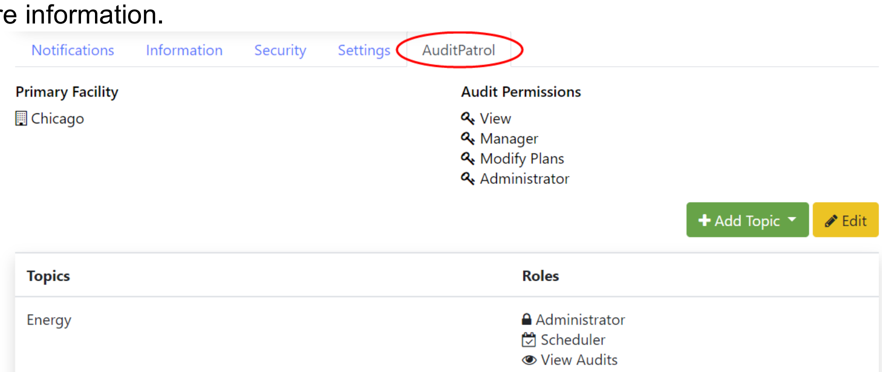
24. Click on the ‘Security’ tab to see a read-only list of the PatrolSuite Roles, Facilities, Active Directory groups, and Permissions that apply to the user. Expand the Active Directory groups to view all AD groups to which a user belongs.

    Note: They ‘key’ icon next to a permission indicates the user has been granted that permission.



User Profile – AuditPatrol Tab

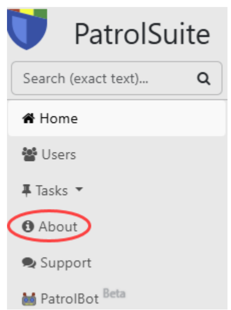
25. Click on the ‘AuditPatrol’ tab to manage a user’s AuditPatrol Topics and Roles. See the AuditPatrol user guide for more information.



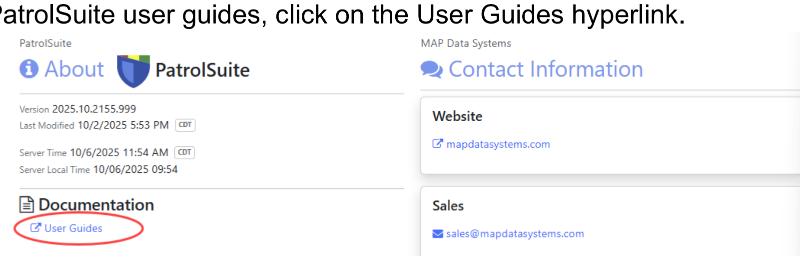
NEW Chapter 6: About

NEW PatrolSuite User Guides

26. Click on the ‘About’ hyperlink in the main menu to access the About page. This page provides read-only information regarding the most recent software version release update and MAP contact information.

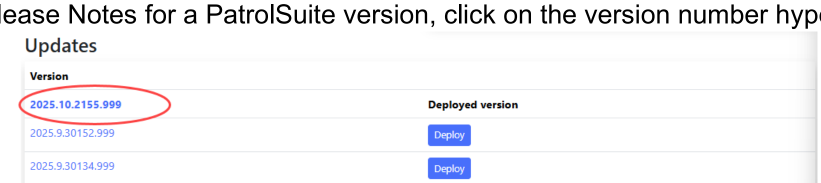


27. To access the PatrolSuite user guides, click on the User Guides hyperlink.



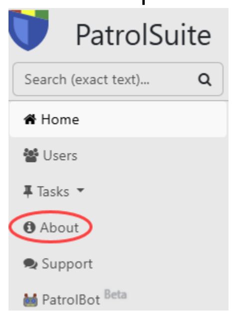
NEW PatrolSuite Version Release Notes

28. To view the Release Notes for a PatrolSuite version, click on the version number hyperlink.

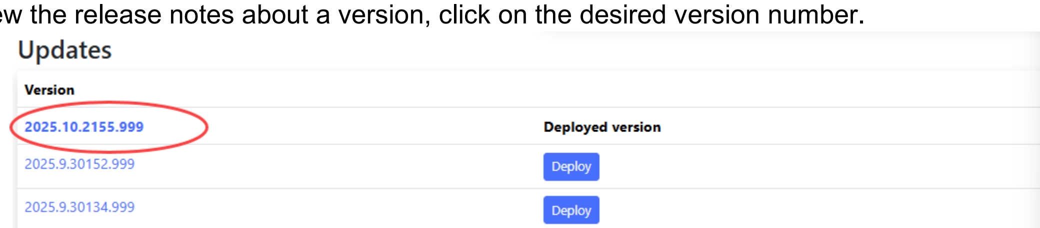


NEW PatrolSuite Version Management

29. To view the PatrolSuite version releases, click on the 'About' hyperlink in the main menu to access the About page. The version releases are listed in the "Updates" section.



30. To view the release notes about a version, click on the desired version number.



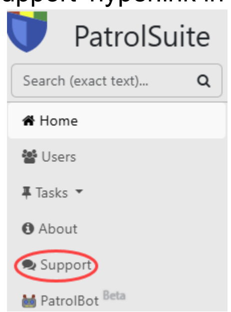
31. NEW To manage which version of PatrolSuite is in use by your organization, click on the desired 'Deploy' button. Typically, the most current version is deployed, but this may be dependent on the status of your organization's validation activities.

    Note: Extreme caution should be exercised before changing versions. Permission to perform this function should be granted only to System Admis. Contact MAP if you have any questions regarding this feature.

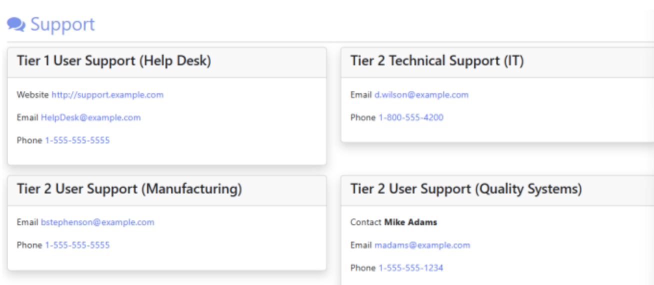
Chapter 7: Support

Support

32. To view the Support page, click on the 'Support' hyperlink in the main menu.

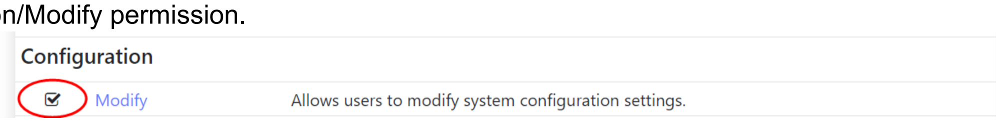


This page provides read-only information regarding who users can contact for Tier-1 technical and user support. Tier-1 support is provided by the organization's PatrolSuite Admins. If the PatrolSuite Admins cannot resolve any internal support request, then the PatrolSuite Admins can contact MAP for Tier-2 support.

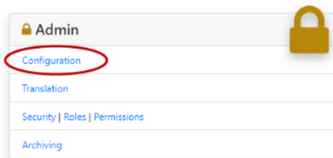


Support Page Contents Management

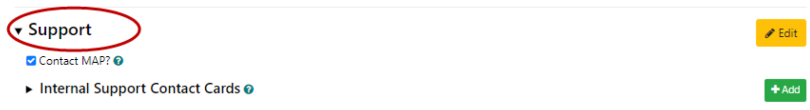
The contents of the Support page can be defined and managed by users in a role with the Configuration/Modify permission.



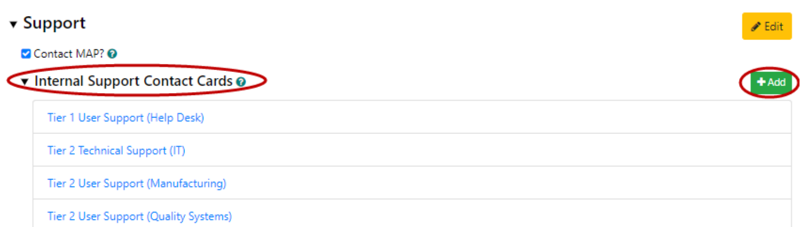
33. On the PatrolSuite homepage, click on the Admin/Configuration hyperlink.



34. To display MAP's contact information on the PatrolSuite About page, click on the 'Support' text and ckeck the "Contact MAP?" checkbox.

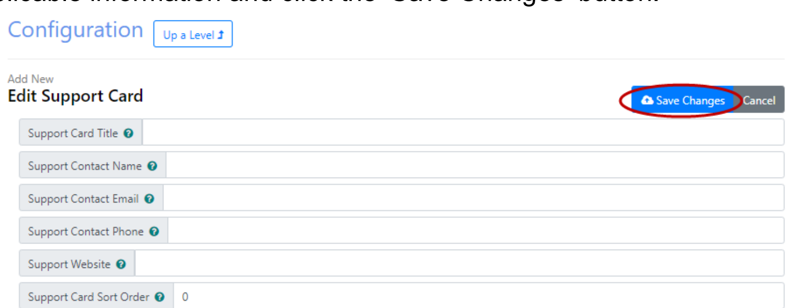


35. To view the internal support contact information, Click on the "Internal Support Contact Cards" text. Hyperlinks to the existing cards are displayed. The image below shows the standard Tier 1-2 cards that come in PatrolSuite.

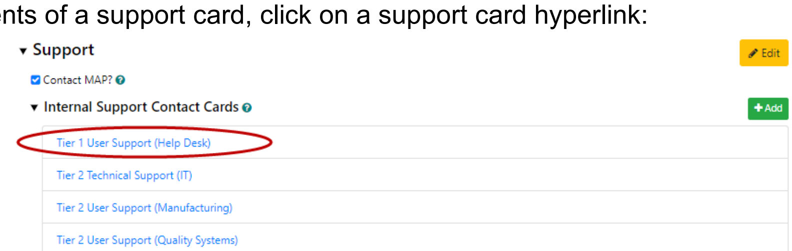


36. To add a new support card, click on the 'Add' button (shown in the image above).

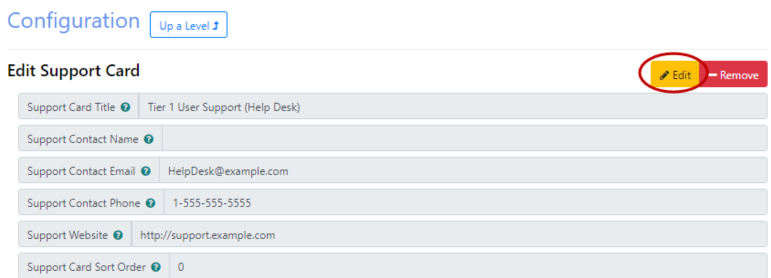
   a. Enter the applicable information and click the 'Save Changes' button.



37. To edit the contents of a support card, click on a support card hyperlink:



38. The edit support card page will appear.
   a. To edit a card, click the 'Edit' button, make changes as desired, and click the 'Save Changes' button.
   b. To delete a card, click on the 'Remove' button and then click on the "Remove Configuration' button in the confirmation window.


Configuration
Up a Level
Edit Support Card
Edit
Remove
Support Card Title
Tier 1 User Support (Help Desk)
Support Contact Name
Support Contact Email
HelpDesk@example.com
Support Contact Phone
1-555-555-5555
Support Website
http://support.example.com
Support Card Sort Order
0

Chapter 8: Tasks

Introduction

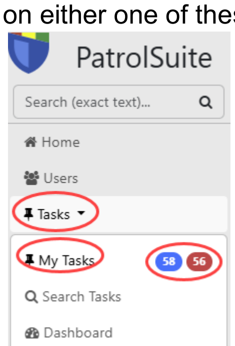
The Task page displays a centralized location where **all tasks** assigned to **all users** in **any PatrolSuite module** can be seen. A hyperlink is provided to take the user to the applicable webpage where the task can be reviewed and performed.

If a task has not been completed by the due date, it will appear as "Overdue" in the task list. If a task is completed after the due date, it will appear as completed "Late" in the applicable user's task list. Once the user completes the task, it will automatically be marked as completed in the task list.

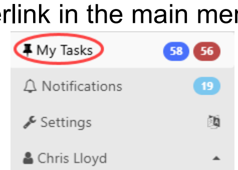
NEW My Tasks

39. To view tasks assigned to you, click on the Tasks dropdown in the main menu and select My Tasks from the submenu.

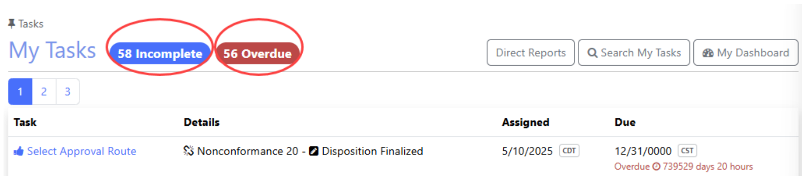
    Note: The user's incomplete tasks are enumerated in the blue circle, the user's past due tasks are enumerated in the red circle. Click on either one of these circles to view those tasks



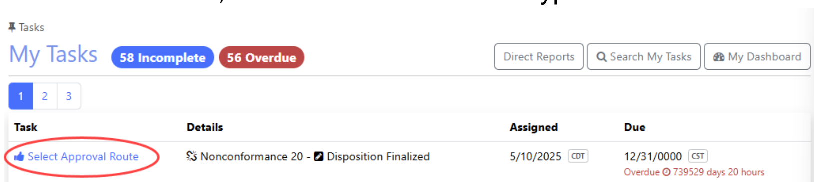
    a. Alternatively, click the My Tasks hyperlink in the main menu.



40. To view your incomplete tasks, click the blue "Incomplete" button. To view your overdue tasks, click the red "Overdue" button.

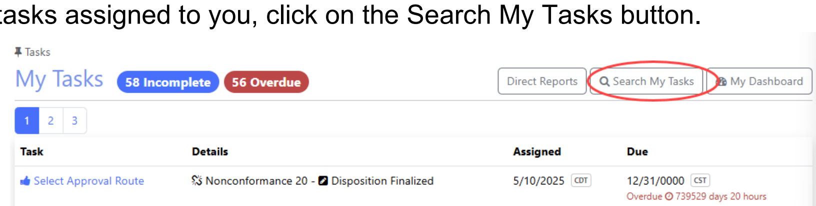


41. To open a task and view its details, click on the desired task hyperlink.

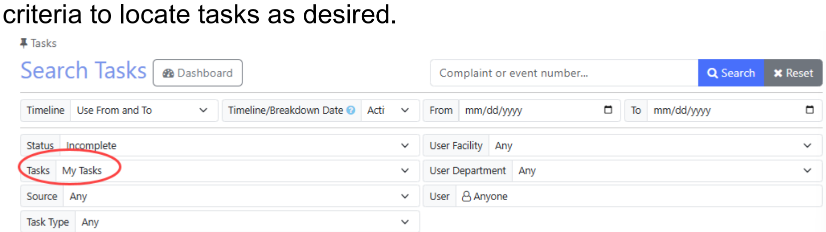


NEW Search My Tasks

42. To further filter tasks assigned to you, click on the Search My Tasks button.

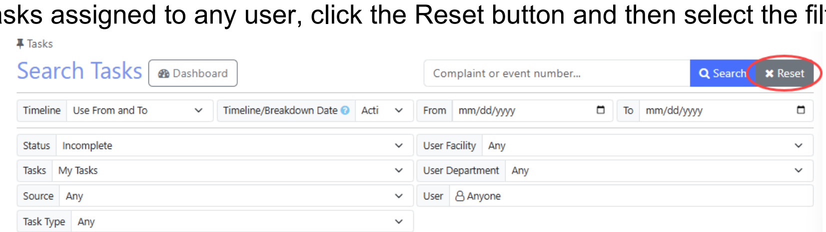


43. Note that this will open the Search Tasks page with “My Tasks” selected in the Tasks dropdown. Select additional filter criteria to locate tasks as desired.



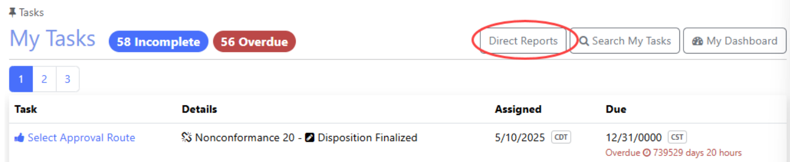
Note: Use the Status dropdown to view complete, currently overdue, incomplete, late and on time tasks.

44. To search for tasks assigned to any user, click the Reset button and then select the filters as desired.

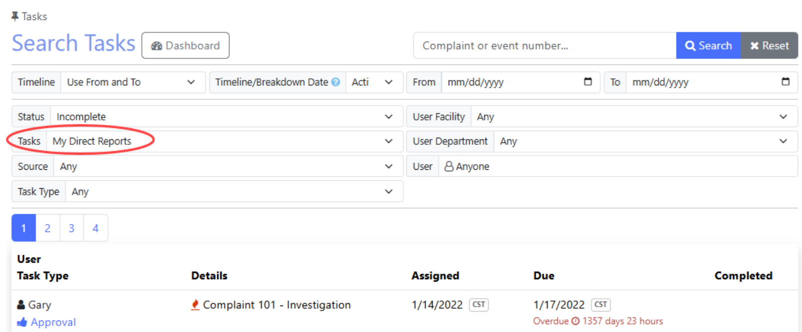


NEW My Direct Reports Tasks

45. To view tasks assigned to users who report to you, click on the Direct Reports button.

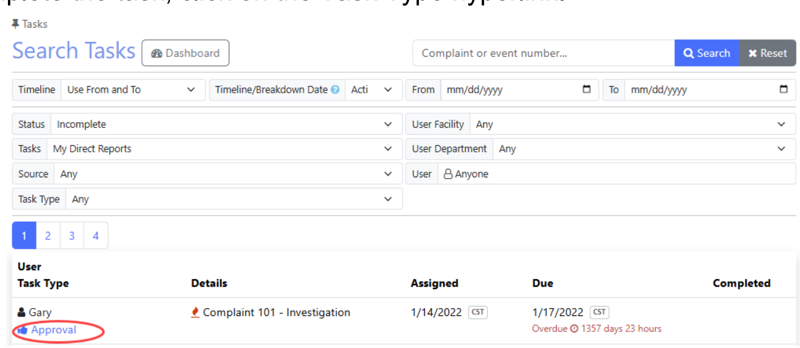


46. Note that this will open the Search Tasks page with “My Direct Reports” selected in the Tasks dropdown. Select additional filter criteria to locate tasks as desired.



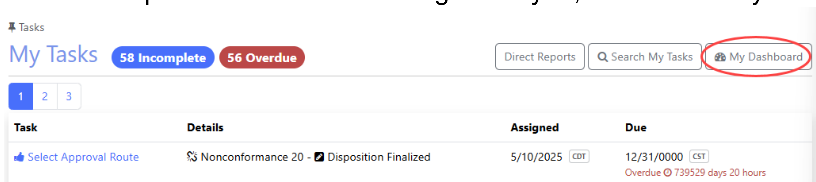
Note: Use the Status dropdown to view complete, currently overdue, incomplete, late and on time tasks.

47. To view and complete the task, click on the Task Type hyperlink.

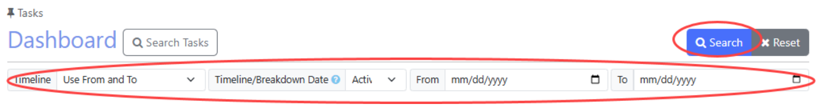


NEW My Dashboard

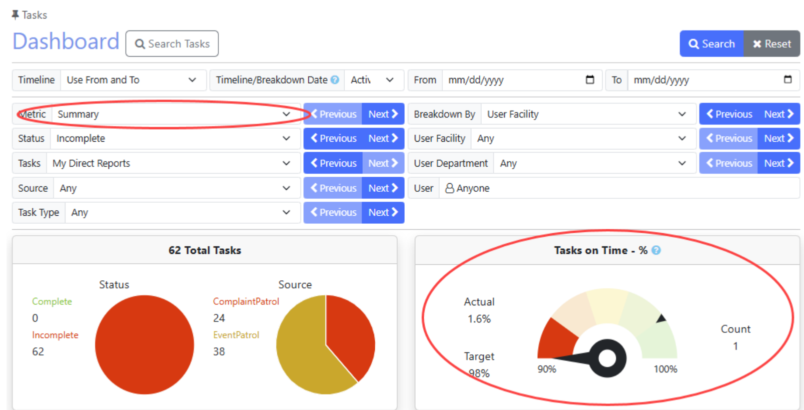
48. To view the task dashboard pre-filtered for tasks assigned to you, click on the My Dashboard button.



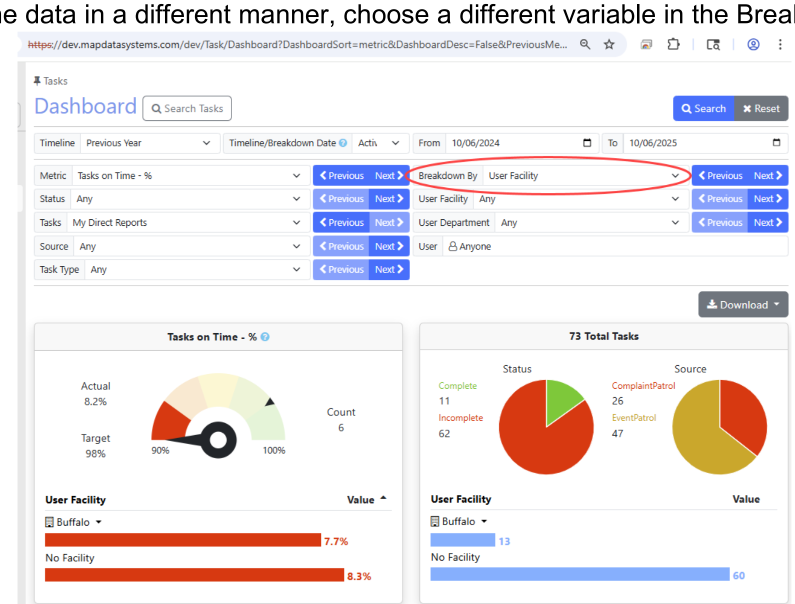
49. To change the date range for the data included in the metrics, use the Timeline dropdown.
    a. Use From and To – Applies the From and To dates as manually entered.
    b. Previous Day – Select to quickly apply the previous day to the From and To cells.
    c. Previous Week – Select to quickly apply the previous 7 days to the From and To cells.
    d. Previous Month – Select to quickly apply the previous 30 days to the From and To cells.
    e. Previous Year – Select to quickly apply the previous 365 days to the From and To cells.
    f. Click on the Timeline/Breakdown help icon to learn how this filter works.



50. To view a desired metric, select the metric from the Metric dropdown. Some more popular metrics are displayed in the dashboard Summary.

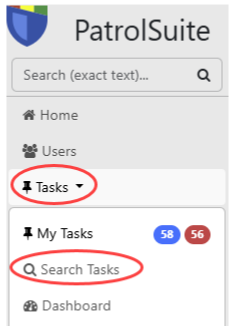


51. To breakdown the data in a different manner, choose a different variable in the Breakdown dropdown.

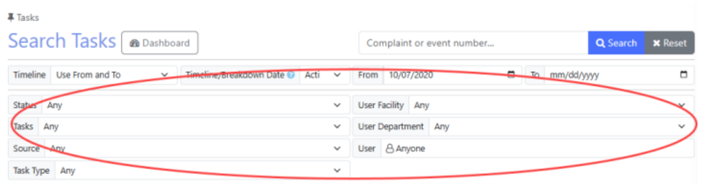


NEW Search (All) Tasks

52. To search all tasks, click Tasks in the main menu and click Search Tasks in the submenu.

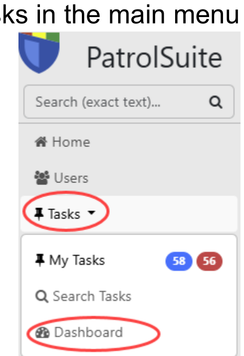


53. This will open the Search Tasks page without any pre-selected filters. Select additional filters as desired.



NEW Task Dashboard

54. To view the Tasks Dashboard, click Tasks in the main menu and click Dashboard in the submenu.



55. This will open the Task Dashboard without any pre-selected filters. Select additional filters as desired.

Chapter 9: Notifications

NEW Introduction

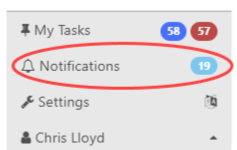
Notifications advise users of events that originate in PatrolSuite modules that do not *require* action and do not have a due date. A Metrics & Reports "capability report" is a good example. The report does not require a user to take any action and there is no due date.

When a notification is received, a number will appear next to "Notifications" in the main menu bar. The number represents how many unacknowledged notifications you have.

Users with PatrolSuite access can view and manage his/her notifications page (there are no notification-specific permissions required).

NEW View & Manage

56. In the main menu, click on Notifications. Note that the number of unacknowledged notifications appears in the blue circle.

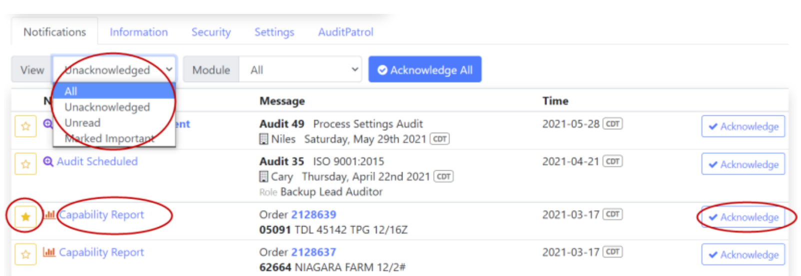


57. To view different notifications, click on the View dropdown and select the desired notification status.

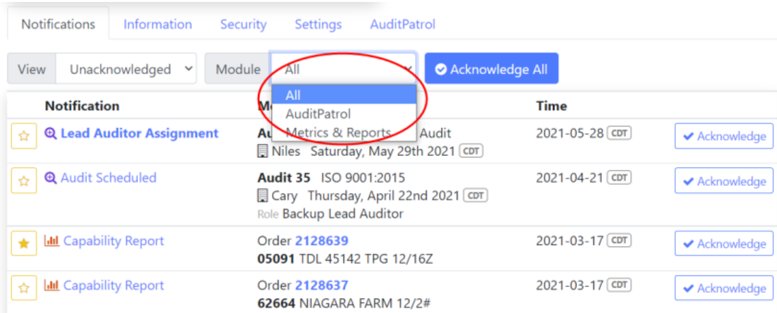
    Unacknowledged - Notifications that have not been acknowledged by means of clicking on the "Acknowledge" button. Unacknowledged notifications are displayed by default.

    Unread- Notifications that have not been viewed by means of clicking on the notification hyperlink. "Unread" notifications are identified with **bold** text.

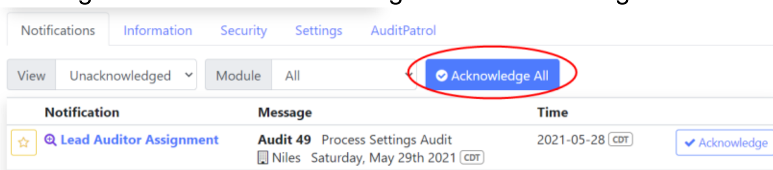
    Marked Important - Notifications that have been tagged as important by means of clicking on the star icon.



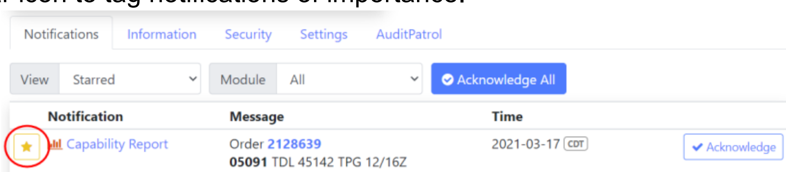
58. Click on the Module dropdown to view notifications from only a certain PatrolSuite module.



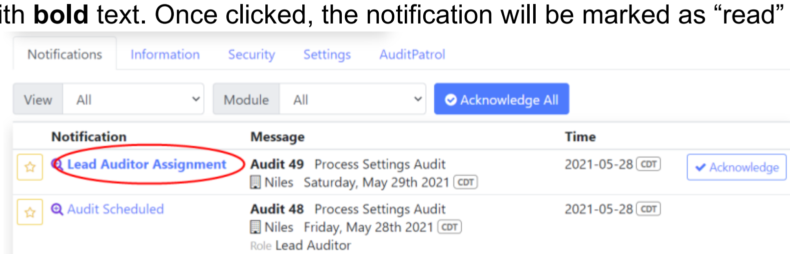
59. Click on the Acknowledge All button to acknowledge all unacknowledged notifications.



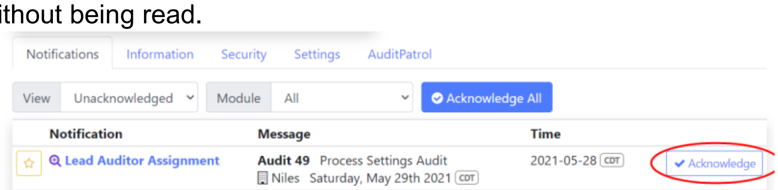
60. Click on the Star icon to tag notifications of importance.



61. Click on the notification hyperlink to open the page associated with the notification. “Unread” notifications are identified with **bold** text. Once clicked, the notification will be marked as “read” (regular text).



62. Click on the Acknowledge button to indicate awareness of the notification. Notifications can be acknowledged without being read.

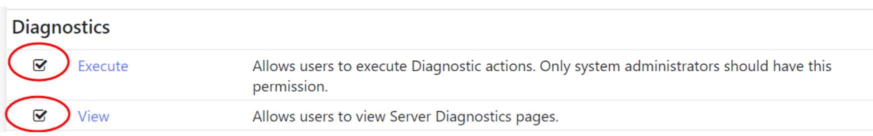


Chapter 10: Diagnostics

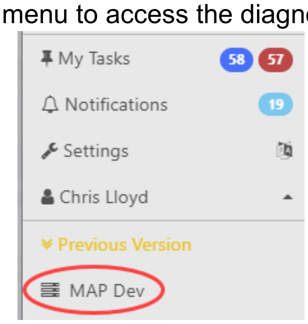
Introduction

The diagnostic pages enable administrators (typically advanced users from the IT department) to run diagnostic tests to evaluate and to manage advanced technical aspects of PatrolSuite.

Users in a PatrolSuite Role with the following permissions granted can view and execute diagnostic features. Extreme caution should be given when making decisions regarding users who will be granted permission to access this feature.

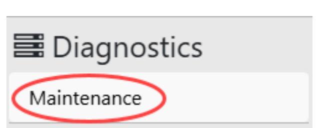


63. Click on the server name in the main menu to access the diagnostics pages.

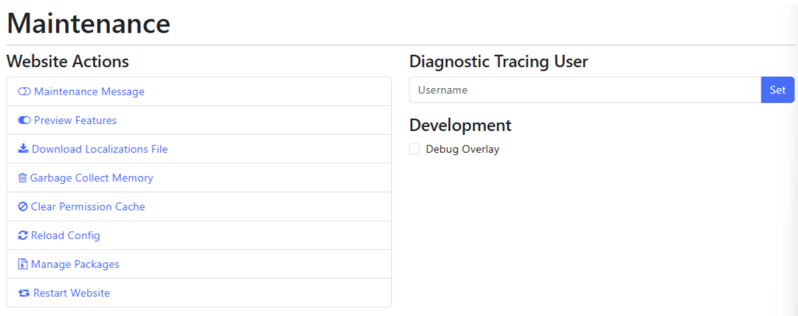


Maintenance

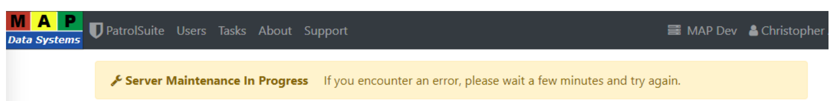
64. To access the Maintenance page, click on the ‘Maintenance’ hyperlink in the diagnostics menu. This page contains hyperlinks that allows the systems administrator to perform maintenance actions on the webserver:



The Maintenance page contains the following controls.



a. **Maintenance Message**: This function displays a maintenance message to all users and is used when updates to the website are being made.



b. **Preview Features**: This feature is available only to MAP Administrators.

c. **Download Localizations File**: This function allows localization files to be downloaded and should be used only by PatrolSuite System Administrators.

d. **Garbage Collect Memory**: This is used to diagnose memory leaks (allocated memory that is not being freed for some reason) by forcing the de-allocation of un-used memory related to PatrolSuite on the webserver.

e. **Clear Permission Cache**: This is used to immediately clear the user permission cache stored on the webserver. Doing so will place updated user permissions into effect immediately.

f. **Reload Config**: If configuration settings are changed, this action causes the webserver to query the database and retrieve the latest configuration settings.

g. **Manage Packages**: Enables the upload of software version packages and should be used only by PatrolSuite System Administrators working directly with MAP technical support.

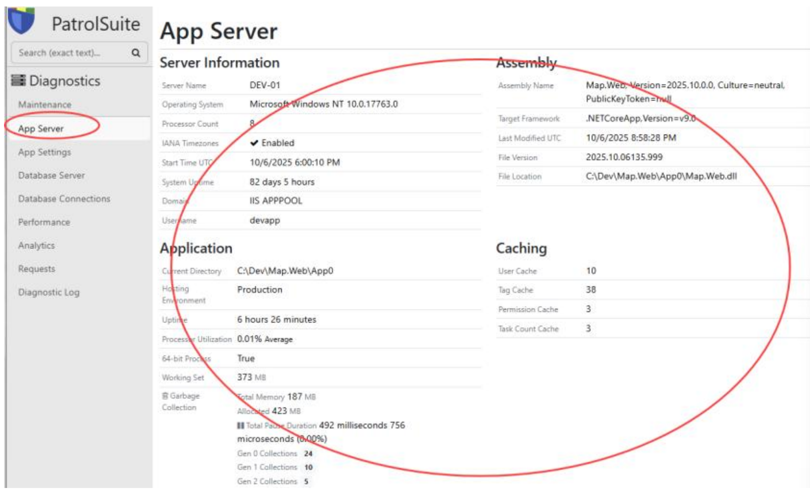
h. **Restart Website**: This re-starts the PatrolSuite executable on the webserver.

i. **Diagnostic Tracing User**: This function provides user request tracing for diagnostic purposes.

j. **Development**: Displays bug overlays and should be used only by PatrolSuite System Administrators working directly with MAP technical support.

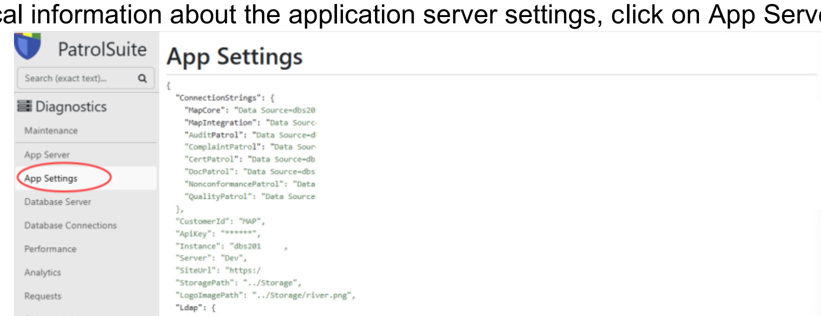
NEW App Server

65. To view technical information about the application server, click on App Server.



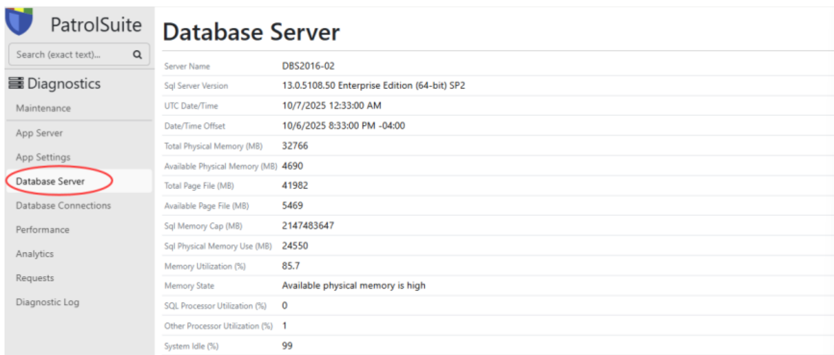
NEW App Settings

66. To view technical information about the application server settings, click on App Server.



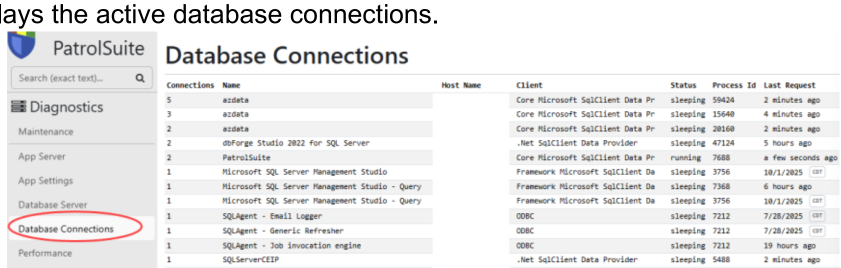
Database Server

67. To view the Databases page, click on the ‘Database Server’ hyperlink. This page displays important information about the PatrolSuite database. This read-only page is used to confirm system readiness for new installations and for software version release updates.



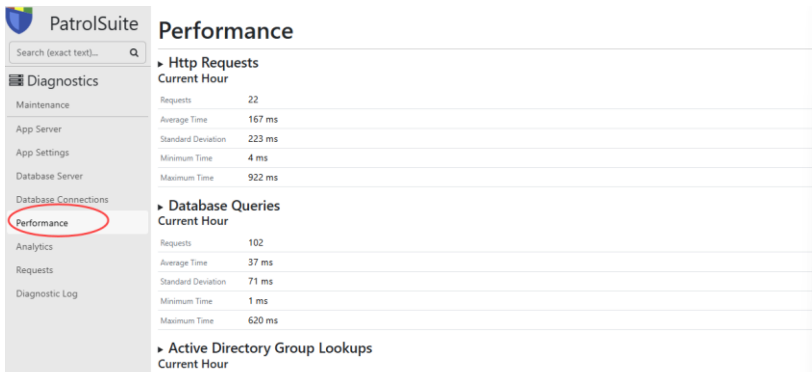
Database Connections

68. To view the Connections page, click on the ‘Database Connections’ hyperlink in the diagnostics menu. This page displays the active database connections.



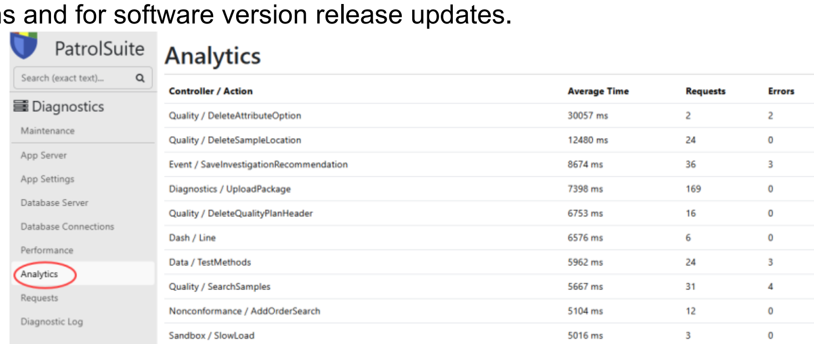
NEW Performance

69. To view performance information within the past 60 minutes, click on the ‘Performance’ hyperlink.



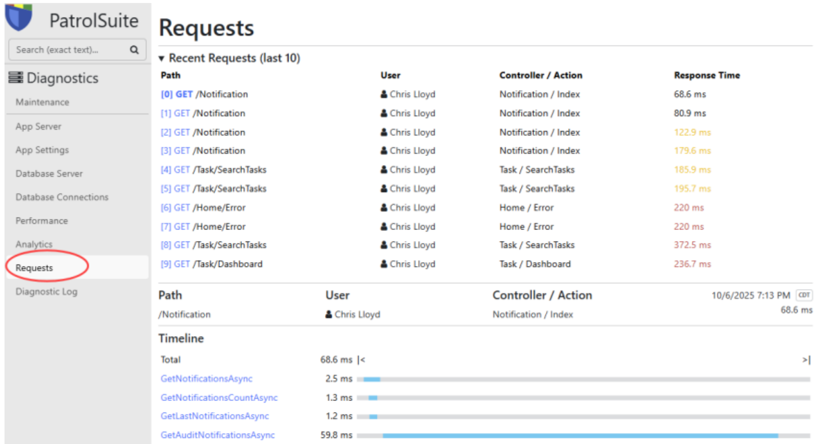
Analytics

70. To view the Analytics data, click on the ‘Analytics’ hyperlink. This page allows an administrator to verify that: (i) that all PatrolSuite pages are loading correctly; and (ii) that no errors are returned when actions are performed on the pages. This feature is used by MAP during installation qualification (IQ) testing for new installations and for software version release updates.



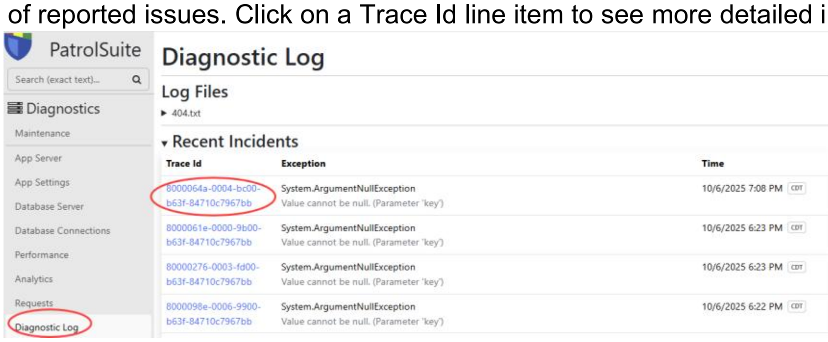
Requests

71. To view a list of the ten most recent requests made to the webserver, click on the ‘Requests’ hyperlink. Click on a request of interest to see the technical details regarding the request. This information is used to streamline the troubleshooting of reported issues. Click on the desired query name arrow or the ‘Results’ arrow to expand the row to see more detailed information.



NEW Diagnostic Log

72. To view the Diagnostics Log page, click on the ‘Diagnostic Log’ hyperlink. This page lists the most recent errors encountered as users navigate throughout PatrolSuite and is used to streamline the troubleshooting of reported issues. Click on a Trace Id line item to see more detailed information.

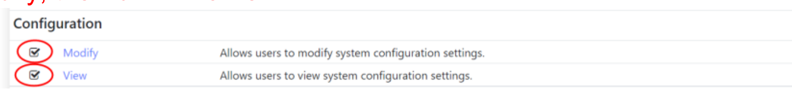


Chapter 11: Admin Configuration

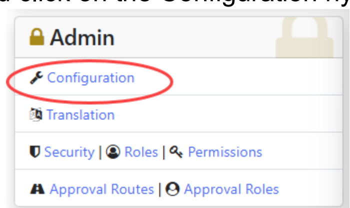
Overview

These pages enable the PatrolSuite System Administrators (typically advanced users from the IT department) to configure and to manage additional technical aspects of PatrolSuite. Keep in mind that all configuration settings are global in nature.

Users in a PatrolSuite Role with the following permissions granted can edit configuration settings. Extreme caution should be given when making decisions regarding users who will be granted permission to access, and especially to modify, the Admin Frame.



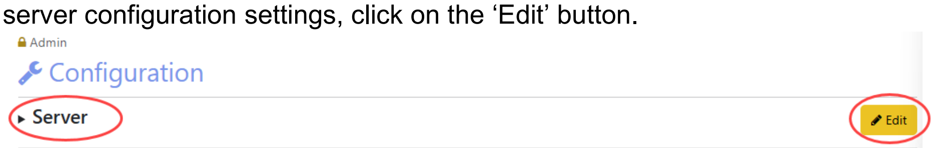
73. Open the PatrolSuite homepage and click on the Configuration hyperlink within the Admin frame.



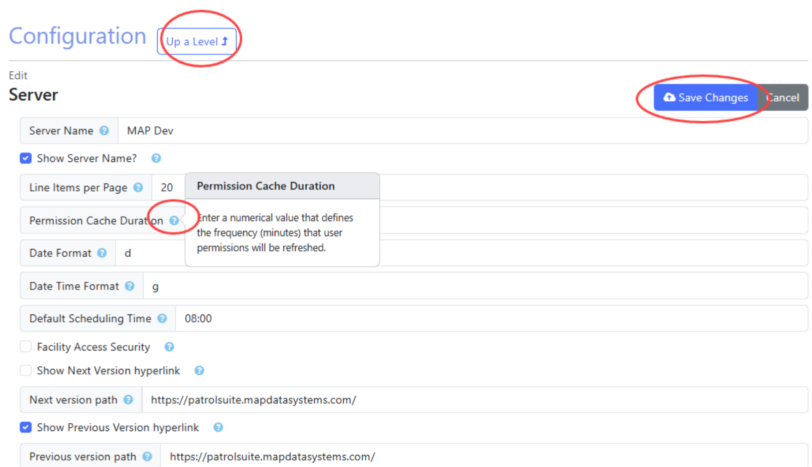
   a. The Configuration homepage will appear. Click on the ‘Edit’ button to manage configuration settings for the applicable topic. Click on the ‘Save Changes’ button to save changes. Click on the icons to access the on-page help information.

NEW Server

74. To view the server configuration settings, click on ‘Server.’
75. To edit the server configuration settings, click on the ‘Edit’ button.



   a. Click on the Help icons for information about each configuration setting. Make changes as desired and click the ‘Save Changes’ button. Click the ‘Up One Level’ button to return to the configuration topic.



Note regarding Line Items per Page: This setting does not affect all pages because some pages might have pre-defined limits to the amount of data displayed.

Note regarding Permission Cache Duration: When a user logs onto PatrolSuite, the app queries Active Directory to obtain user Groups and then saves the user's permissions in the webserver cache. As each user navigates throughout PatrolSuite, the app checks the user's permissions as stored in the webserver cache, not Active Directory (this is a much more network friendly approach as it reduces the strain on AD which can take a relatively long time to return permissions because it is often busy communicating with other applications which frequently query AD). This setting defines how long before PatrolSuite re-queries Active Directory to refresh Groups and Permissions cached on the webserver. For stable PatrolSuite deployments where user permissions are not changing on a daily basis, a setting of 480 minutes (every 8 hours) might be reasonable. For new PatrolSuite deployments where user Groups and Permissions are being defined or changed frequently, a setting of 30-60 minutes might be appropriate.

Considerations regarding the permission cache duration:

i If the duration is set to, for example, 60 minutes, and a user's permission is changed, it could take up to 60 minutes to take effect in PatrolSuite.

ii When the duration expires, PatrolSuite will re-query AD to refresh Groups and Permissions on the webserver. If AD is over-taxed by other apps that query it frequently, then someone, somewhere in PatrolSuite is going to experience one page load or query that takes longer than normal. Accordingly, setting the permission cache duration to a low number can have ill-effects on the user experience due to performance.

iii When a user’s permissions are changed in AD, an administrator can immediately refresh the permission cache using the PatrolSuite Diagnostics tools.

Note regarding Date Format: The default date format is “yyyy-MM-dd.”

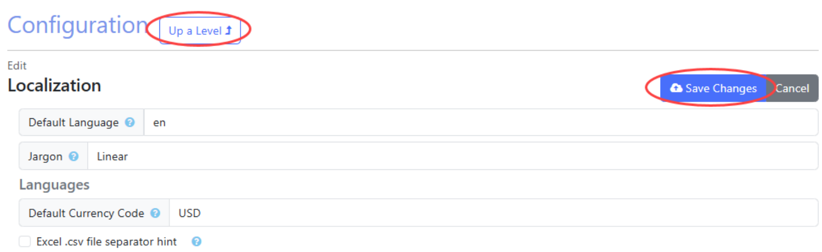
Note regarding Date/Time Format: The default date/time format is “yyyy-MM-dd h:mm tt.”

Localization

Defines the default currency, the default language, and the additional languages used across the corporate enterprise.

76. To view and edit the localization configuration settings, click on ‘Localization’ text and then click on the ‘Edit’ button.

   a. Click on the Help icons for information about each localization setting. Make changes as desired and click the ‘Save Changes’ button. Click the ‘Up One Level’ button to return to the configuration topic.

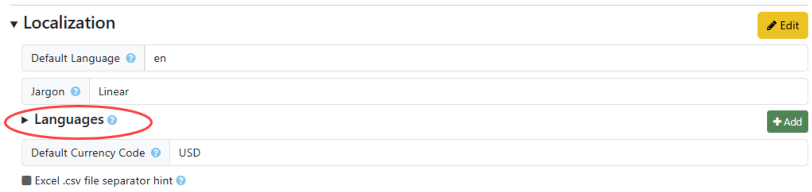


Note regarding Default Language: Identifies the corporate default language in which most users will enter information into PatrolSuite. Accordingly, the localization tasks will be to translate from the default language to the other languages the language set. Note that, for a global corporation, this setting does not prevent users in a foreign facility from entering text into PatrolSuite using their local language.

Note regarding Jargon: Depending on the nature of your corporate environment, ‘Jargon’ may or may not be displayed. The default setting for Jargon is “Linear” and MAP recommends not changing this setting without further consultation with MAP.

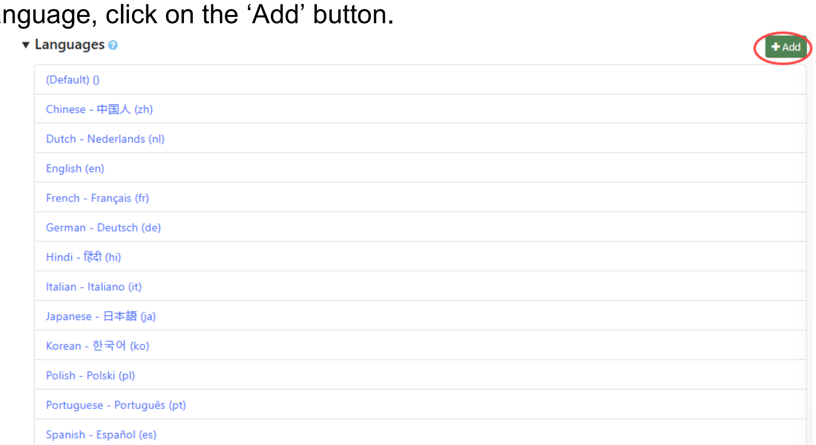
NEW Note regarding Default Currency Code: Use the three-letter ISO 4217 code.

77. To view the additional languages to which user-supplied content will be translated, click on ‘Languages.’

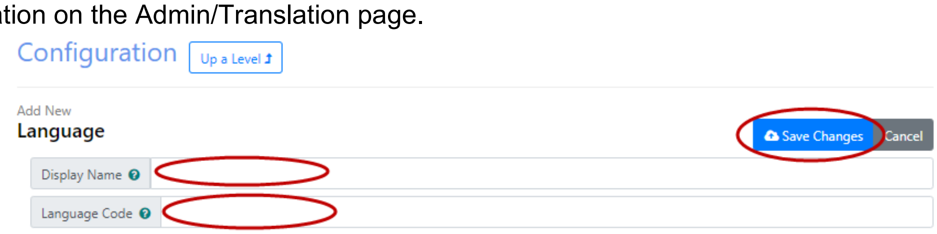


The image below shows the out-of-the-box languages supported by PatrolSuite. The administrator can add languages as necessary to reflect the corporate requirements. However, removing languages is typically not necessary because a user's browser settings determine the language in which PatrolSuite is displayed.

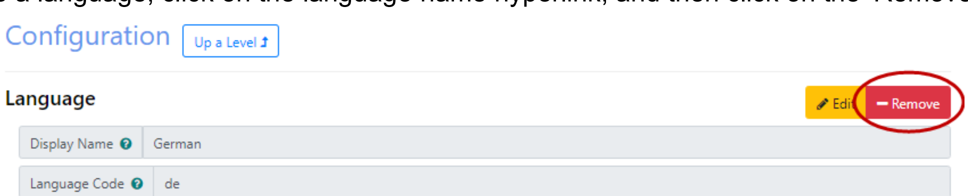
78. To add a new language, click on the 'Add' button.



   a. Enter the language Display Name and the Language Code (the two character ISO639-1 language code). Click on the 'Save Changes' button. Thereafter, the new language will be available for translation on the Admin/Translation page.



79. To remove a language, click on the language name hyperlink, and then click on the 'Remove' button.



Homepage

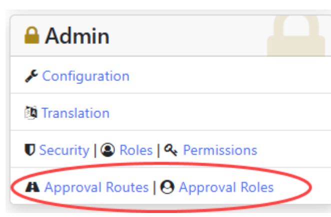
This functionality is covered in a subsequent chapter within this user guide.

Support

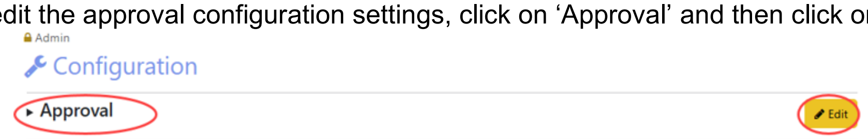
This functionality is covered in a previous chapter within this user guide.

Approval

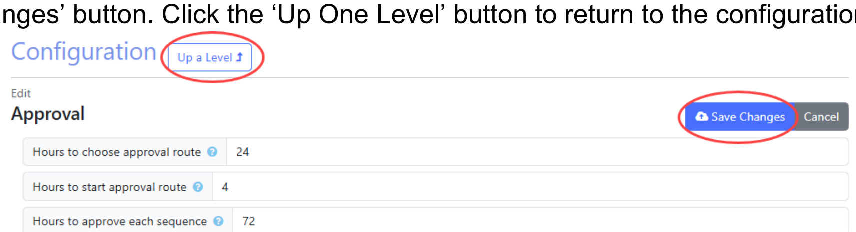
This page allows an administrator to configure settings related to the approval routes. The approval routes and roles are found on the PatrolSuite homepage Admin card and are used to define the required approvers for all PatrolSuite modules that have and embedded approval process (i.e. ComplaintPatrol, EventPatrol, and Nonconforming Product).



80. To view and edit the approval configuration settings, click on ‘Approval’ and then click on the ‘Edit’ button.



a. Click on the Help icons for information about each setting. Make changes as desired and click the ‘Save Changes’ button. Click the ‘Up One Level’ button to return to the configuration topic.



Note regarding Hours to Choose Approval Route: This setting defines the number of hours from completion of an event that requires approval to selection of the approval route before the user's approval task is marked as past due. A setting of 24 hours is typical.

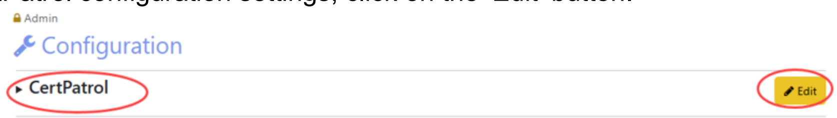
Note regarding Hours to Start Approval Route: This setting defines the number of hours from selecting the approval route to starting the route before the user's approval task is marked as past due. A setting of 1-3 hours is typical.

Note regarding Hours to Approve Each Sequence: This setting defines the number of hours for each sequence in an approval route to be approved before the approver's tasks are marked as past due. A setting of 72 hours is typical.

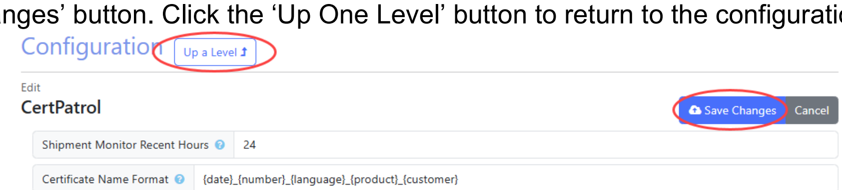
CertPatrol

This page allows an administrator to configure settings related to CertPatrol and Shipment Monitor.

81. To view the CertPatrol configuration settings, click on ‘CertPatrol.’
82. To edit the CertPatrol configuration settings, click on the ‘Edit’ button.



a. Click on the Help icons for information about each setting. Make changes as desired and click the ‘Save Changes’ button. Click the ‘Up One Level’ button to return to the configuration topic.

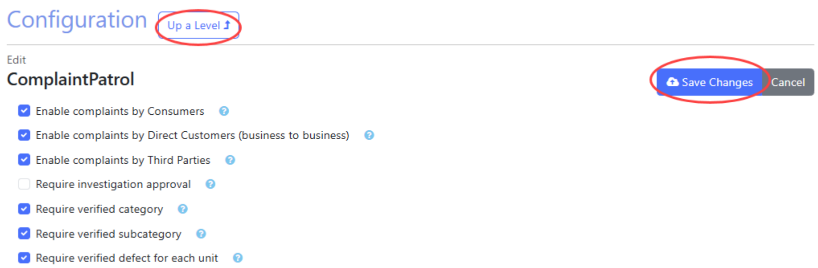


Note regarding Shipment Monitor Recent Hours: The Shipment Monitor/Recent tab displays the certificates that have recently been processed (created or ignored). This setting defines the maximum number of hours old a certificate action (create or ignore) can be before the certificate no longer appears on the recent tab. A setting of 24 hours is typical.

ComplaintPatrol

83. To view and edit the ComplaintPatrol configuration settings, click on ‘ComplaintPatrol’ and then click on the ‘Edit’ button.

a. Click on the Help icons for information about each setting. Make changes as desired and click the ‘Save Changes’ button. Click the ‘Up One Level’ button to return to the configuration topic.



DashPatrol

84. To view and edit the DashPatrol configuration settings, click on ‘DashPatrol’ and then click on the ‘Edit’ button.

a. Click on the Help icons for information about each setting. Make changes as desired and click the ‘Save Changes’ button. Click the ‘Up One Level’ button to return to the configuration topic.

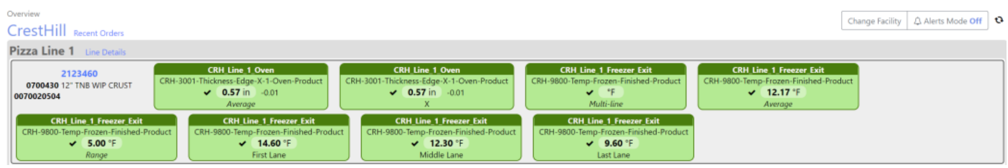
Note regarding Chart Page Refresh Interval: This setting defines how frequently the browser checks for new data in the database to update the SPC chart page. A setting of 60 seconds is typical.

Note regarding Dashboard Cache Refresh Interval: The webserver running PatrolSuite has its own cache refresh interval. This setting defines how frequently the webserver’s dashboard data cache is refreshed from the database. A setting of 90 seconds is typical.

Note regarding Dashboard Refresh Interval: This setting defines how frequently the browser checks the webserver for updates that will change the color of, and the data displayed within, the status buttons. A setting of 30 seconds is typical; the dashboard refresh interval is typically less than the dashboard cache refresh interval.

Note regarding Show Operations: This setting defines whether the corresponding Operation is displayed on the alarm buttons shown on the DashPatrol Facility Overview page. ‘Checked’ is the default display setting. The image below shows the DashPatrol Facility Overview page with Show Operations = ‘Checked’:

The image below shows the DashPatrol Facility Overview page with Show Operations = ‘Not Checked’:

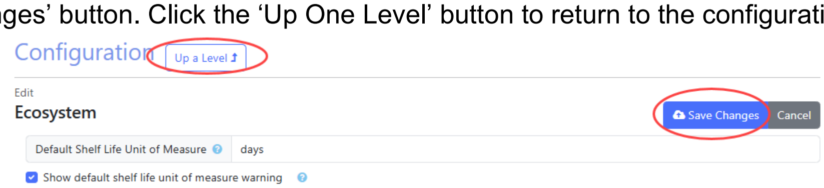


Use Case: If the nature of the manufacturing process (or MES implementation) is a 1:1 relationship between the Operation and the Workcenter (i.e. the operations and the workcenters have the same name), then a Show Operations value of “Checked” will result in the same information will be displayed twice. Accordingly, this feature allows the administrator to choose not to display the Operation name at the top of the test method button.

NEW Ecosystem

85. To view and edit the Ecosystem configuration settings, click on ‘Ecosystem’ and then click on the ‘Edit’ button.

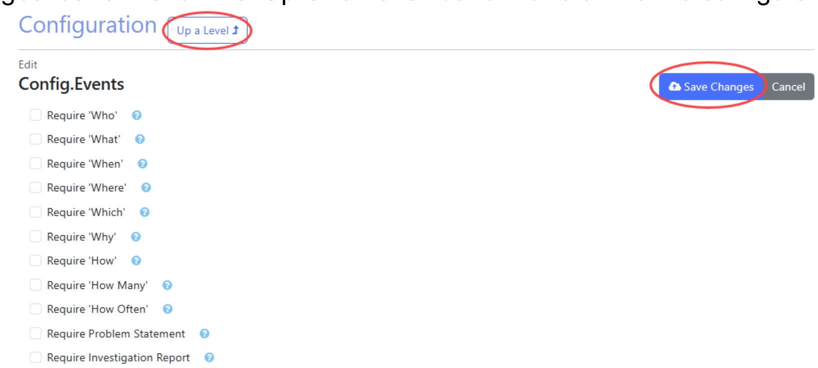
a. Click on the Help icons for information about each setting. Make changes as desired and click the ‘Save Changes’ button. Click the ‘Up One Level’ button to return to the configuration topic.



NEW EventPatrol

86. To view and edit the EventPatrol configuration settings, click on ‘EventPatrol’ and then click on the ‘Edit’ button.

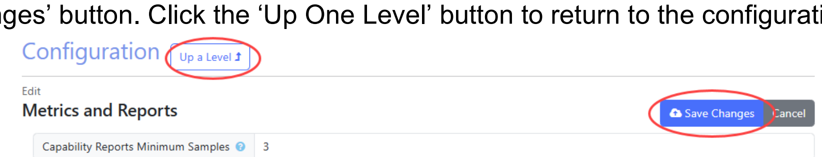
a. Click on the Help icons for information about each setting. Make changes as desired and click the 'Save Changes' button. Click the 'Up One Level' button to return to the configuration topic.



Metrics and Reports

87. To view and edit the Metrics and Reports configuration settings, click on 'Metrics and Reports' and then click on the 'Edit' button.

a. Click on the Help icons for information about each setting. Make changes as desired and click the 'Save Changes' button. Click the 'Up One Level' button to return to the configuration topic.

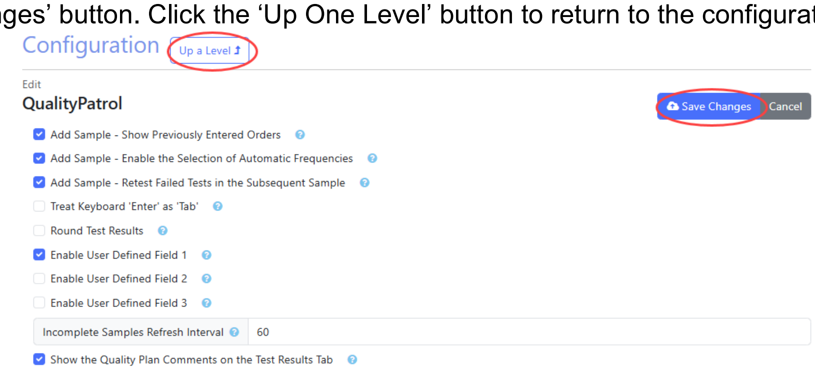


Note regarding Capability Reports Minimum Samples: This setting defines the number of data points required before capability indices will be calculated and displayed within the Capability & Performance report pages. The default value is 3.

NEW QualityPatrol

88. To view and edit the QualityPatrol configuration settings, click on 'QualityPatrol' and then click on the 'Edit' button.

a. Click on the Help icons for information about each setting. Make changes as desired and click the 'Save Changes' button. Click the 'Up One Level' button to return to the configuration topic.

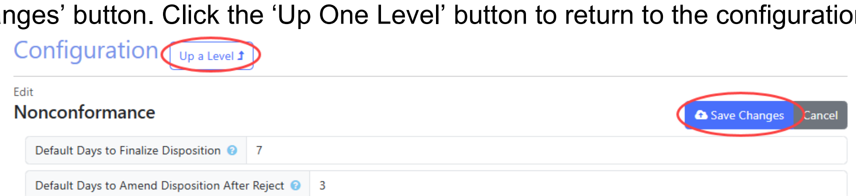


NEW Nonconformance

This page allows an administrator to configure settings related to the QualityPatrol Nonconforming Product features. These features may or may not be actionable depending on system needs.

89. To view and edit the Nonconformance configuration settings, click on 'Nonconformance' and then click on the 'Edit' button.

a. Click on the Help icons for information about each setting. Make changes as desired and click the 'Save Changes' button. Click the 'Up One Level' button to return to the configuration topic.



Chapter 12: Admin Translation

Localization

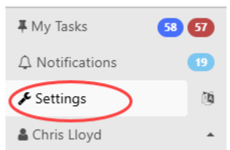
PatrolSuite is a multilingual app which automatically renders the website in *the user's* desired language. This means that (with a few exceptions) the user is in control of the language he/she wants to see PatrolSuite, not the IT department. Each user can control the rendered language in two ways:

A. Change the language using the user's browser settings. This assumes the user is using a browser that supports localization. Contact your IT department for instructions regarding browser controls such as language preferences.

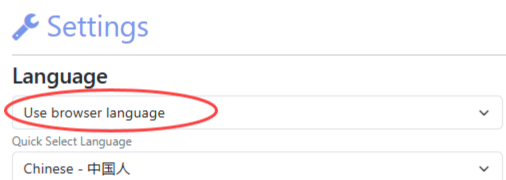
Note: If a user sets the preferred browser language to, for example, German and then sets the language in his/her user profile to (see methods 2 below), for example, Spanish, then the browser will likely ask the user which language to use, and the browser will use its own translation engine and bypass the translations defined in PatrolSuite.

B. Change the language using the PatrolSuite user profile settings as follows:

90. To Change the language using the PatrolSuite user profile settings, click on Settings in the main menu to access your user profile page.



a. Click on the Settings tab. Choose the desired language from the list of supported languages. All PatrolSuite pages will be rendered in the chosen language.

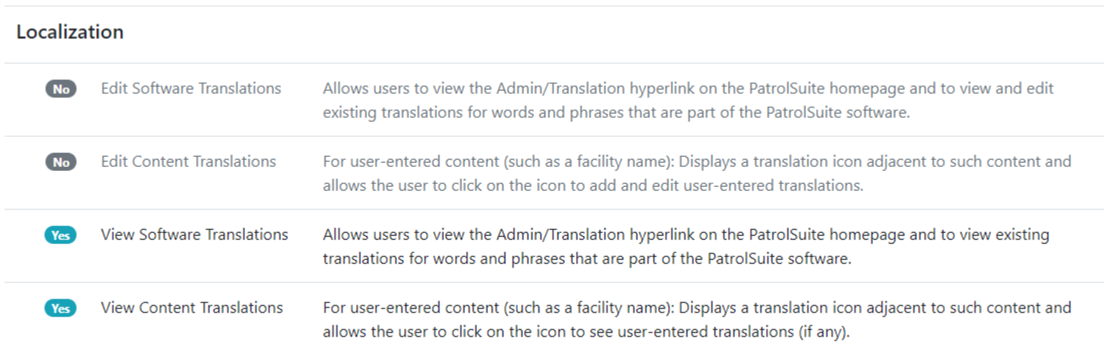


Translation Permissions

Users in a PatrolSuite Role that grants the following permissions can edit translations. Caution should be given when making decisions regarding users who are granted permission to edit/manage translations. All translation changes take effect immediately on the next page load.

Localization		
Yes	Edit Software Translations	Allows users to view the Admin/Translation hyperlink on the PatrolSuite homepage and to view and edit existing translations for words and phrases that are part of the PatrolSuite software.
Yes	Edit Content Translations	For user-entered content (such as a facility name): Displays a translation icon adjacent to such content and allows the user to click on the icon to add and edit user-entered translations.
Yes	View Software Translations	Allows users to view the Admin/Translation hyperlink on the PatrolSuite homepage and to view existing translations for words and phrases that are part of the PatrolSuite software.
Yes	View Content Translations	For user-entered content (such as a facility name): Displays a translation icon adjacent to such content and allows the user to click on the icon to see user-entered translations (if any).

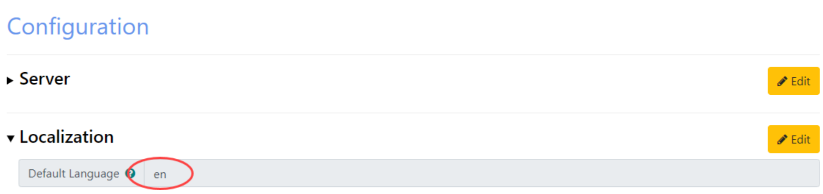
Users in a PatrolSuite Role that grants the following permissions can view (but not edit) the translation pages. A typical user within the organization has no need to view the translation pages.



Localization		
No	Edit Software Translations	Allows users to view the Admin/Translation hyperlink on the PatrolSuite homepage and to view and edit existing translations for words and phrases that are part of the PatrolSuite software.
No	Edit Content Translations	For user-entered content (such as a facility name): Displays a translation icon adjacent to such content and allows the user to click on the icon to add and edit user-entered translations.
Yes	View Software Translations	Allows users to view the Admin/Translation hyperlink on the PatrolSuite homepage and to view existing translations for words and phrases that are part of the PatrolSuite software.
Yes	View Content Translations	For user-entered content (such as a facility name): Displays a translation icon adjacent to such content and allows the user to click on the icon to see user-entered translations (if any).

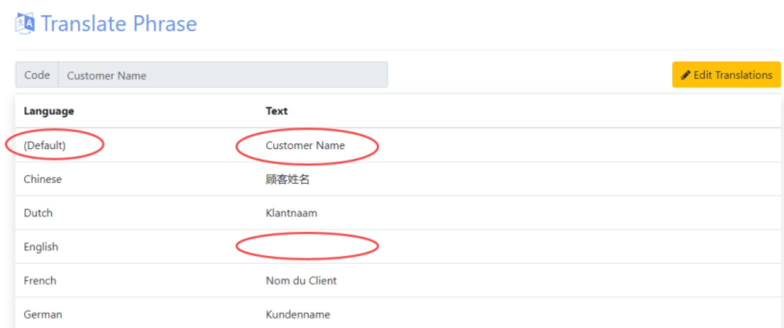
Default Language

A single default language is defined by the organization from which all PatrolSuite translations should be defined. See Chapter 7 for how the default language is defined. In the example below, the organization's default language is English (culture code "en").

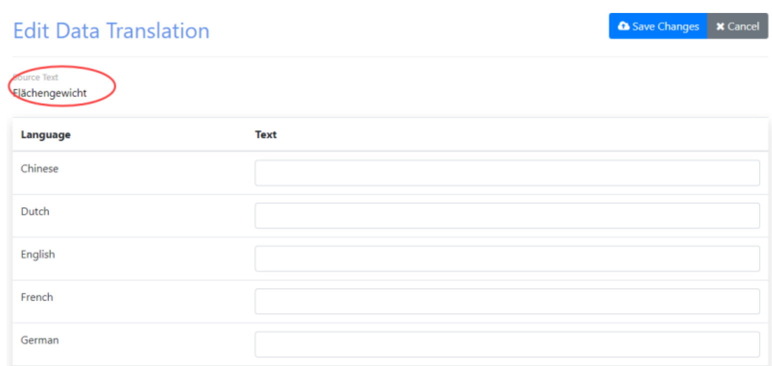


It is very important that all users involved in translations understand the role that the default language plays in rendering the website. In the above example where the default language for the organization is English:

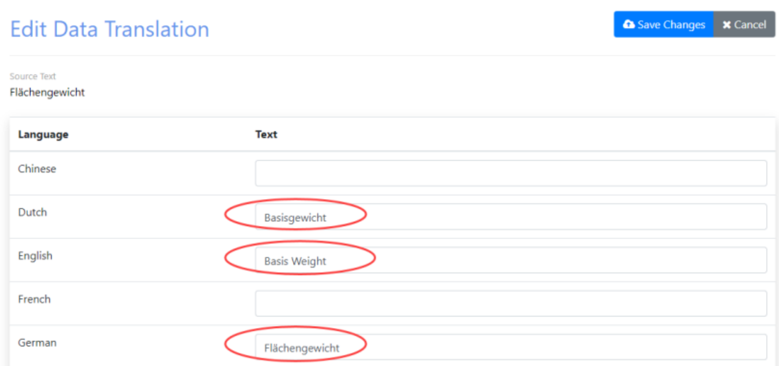
A. Software text and phrases appear with the default localization identified as such, and no further translation into English is required because English is the default. Note that if an alternate translation were entered into the English row, then the website will apply the text in the English row, and ignore the text defined in the (Default) row.



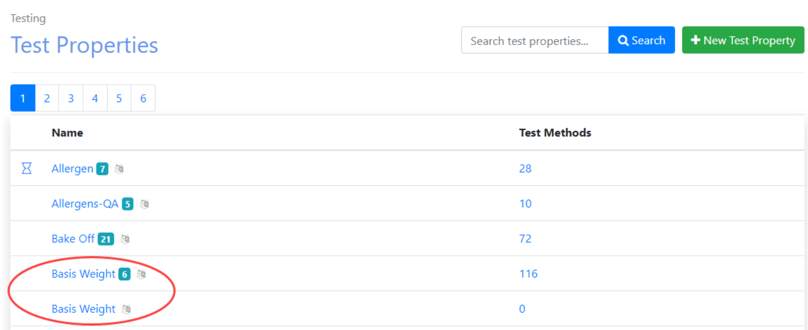
B. User-entered content appears with the word shown as the “Source Text” which PatrolSuite assumes was entered in the default language (English). In the example below, the user-entered content was incorrectly entered in German instead of English. When possible, always enter user-content in the default language (e.g. English) and then translate the content into the required languages (e.g. German).



To attempt to fix errors like the one shown above where the Source Text was entered in a language different than the default language, the Source Text can be translated into the required languages, including English, as shown below.



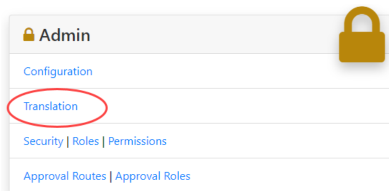
This will result in the Source Text appearing in English for users who request PatrolSuite to render the website in English. However, this often results in the following, even worse problem: There was already a test property in the system called “Basis Weight.” Now two of the same properties exist and users who need to consume this property (e.g. in a test plan) won’t know which property to select. This also wreaks havoc on metrics and reports. When possible, always enter user-content in the default language (English) and then translate the content into the required languages (e.g. German). This will help avoid creating duplicate items.



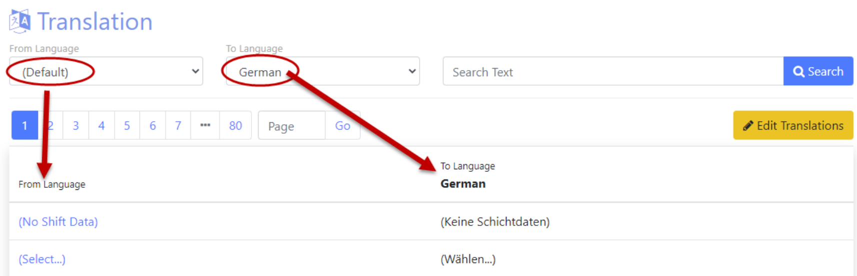
Translation of the Website Content & Labels

The translation page enables an admin to edit the translations of words and phrases that appear throughout PatrolSuite. User-entered content such as test method names are translated differently; by clicking on the localization icon ( ) that appears next to the user-entered item.

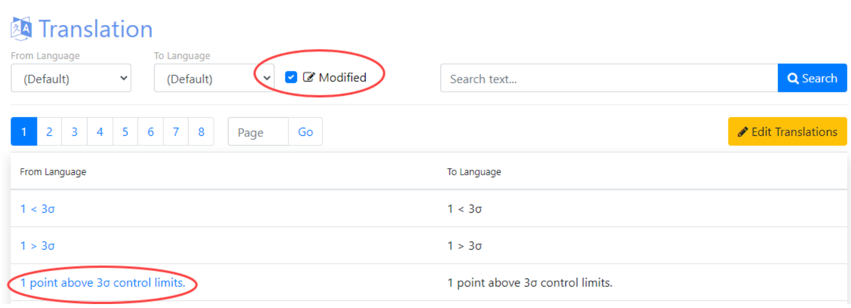
91. Click on the Admin/Translation hyperlink:



92. Choose the desired ‘From’ and ‘To’ languages. The words and phrases appearing throughout this page will appear in the chosen languages.

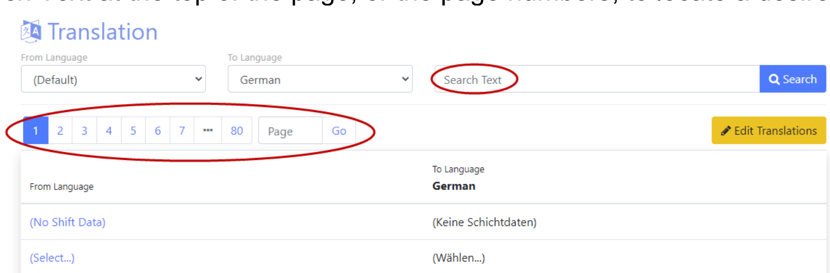


93. Click the ‘Modified’ checkbox to see phrases that have been translated by your organization to something other than the out-of-the-box translation.



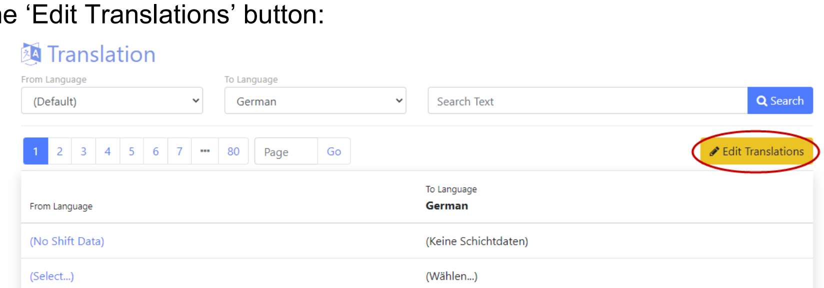
a. Click on the From Language phrase to see which languages have been modified (as indicated by the modified icon).

94. Use the Search Text at the top of the page, or the page numbers, to locate a desired word or phrase.

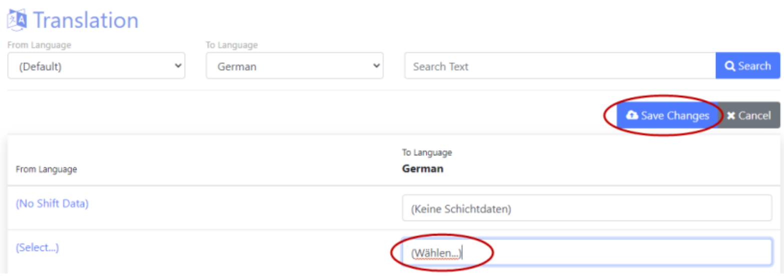


95. To edit the translation for the To Language:

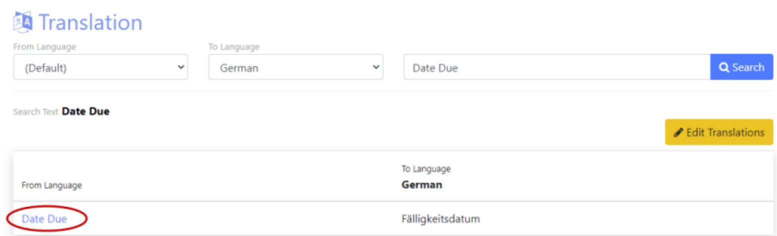
a. Click on the ‘Edit Translations’ button:



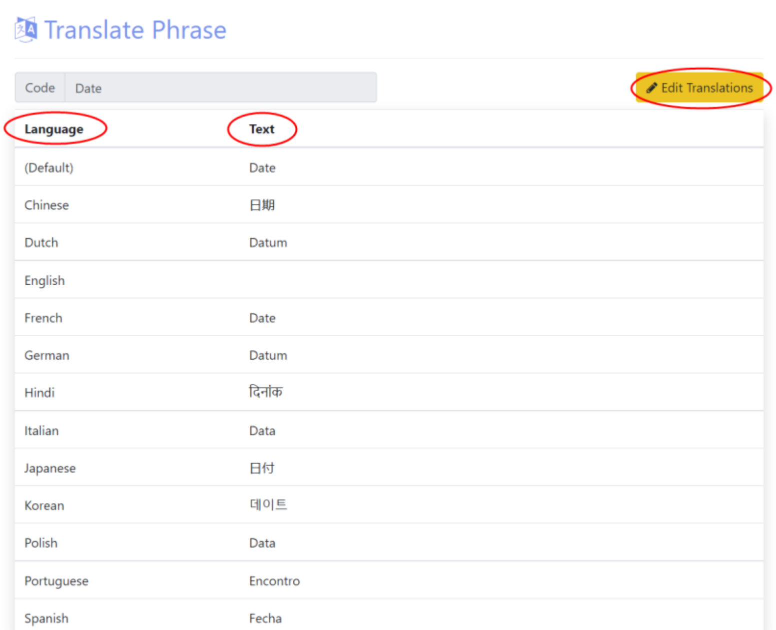
b. Click onto the desired word and use your keyboard to change the translation. Click on the ‘Save Changes’ button.



96. To view and edit all translations for a word or phrase, click on the hyperlinked word or phrase in the From Language column.



97. The chosen word or phrase will appear in a list that displays all languages defined by the organization, and the translation for each language. Click on the ‘Edit Translations’ button to edit any or all of the translations.



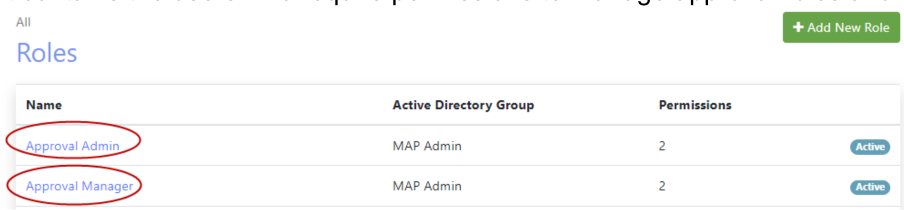
Chapter 10: Admin Approval

Approval Roles vs. Individual Users

The approval routes defined in PatrolSuite can request approval from a user who resides in an "approval role" (role-based-approval), or from a specific individual (user-based approval), or a combination of both. MAP strongly encourages using the role-based approval process because it is easier to maintain and improves the probability that an approval route can be completed. To support role-based approval, the approval roles are defined, and then users are added, or removed, from each role.

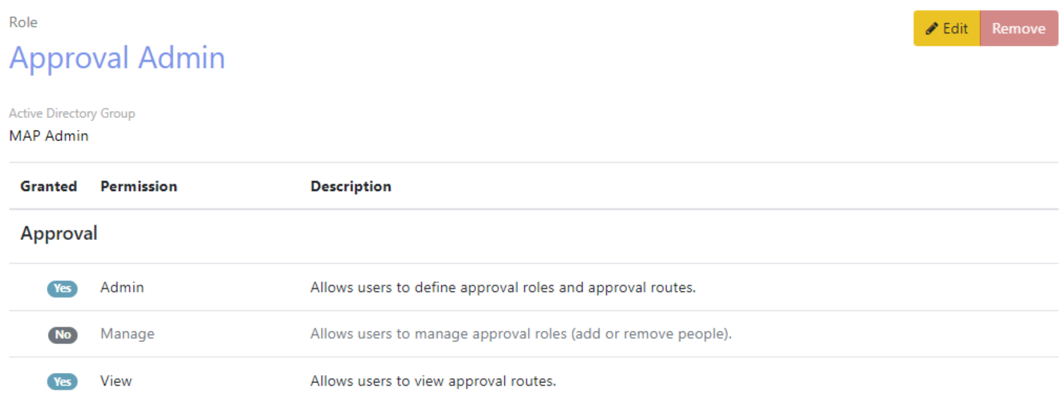
Security and Permissions

98. MAP recommends creating the following PatrolSuite Roles and corresponding Active Directory groups that contains the users who require permissions to manage approval roles and routes:



Users in a PatrolSuite Role with the following permissions granted can define approval roles. Caution should be given when making decisions regarding users who will be granted the permission to create approval roles. Roles should be clear and usable across the enterprise without overlap or similar role names.

Avoid creating roles that are facility-based. For example, the "Quality Manager" role should contain the quality managers from *all* facilities. When an approval process is initiated for the facility located in Denver, the system will automatically suggest the quality manager from the Denver plant be chosen as the approver in this role.



Role

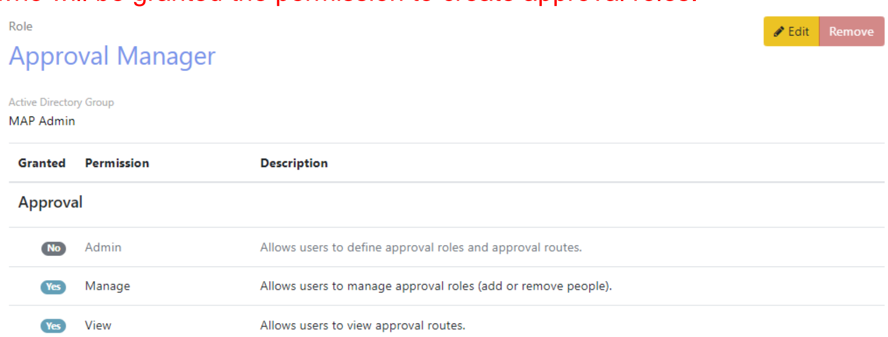
Approval Admin

Edit | Remove

Active Directory Group
MAP Admin

Granted	Permission	Description
Approval		
Yes	Admin	Allows users to define approval roles and approval routes.
No	Manage	Allows users to manage approval roles (add or remove people).
Yes	View	Allows users to view approval routes.

Users in a PatrolSuite Role with the following permissions granted can edit add and remove users in existing approval roles, but cannot create or edit the roles. Caution should be given when making decisions regarding users who will be granted the permission to create approval roles.



Role

Approval Manager

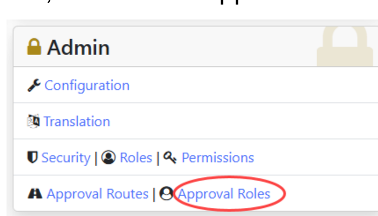
Edit | Remove

Active Directory Group
MAP Admin

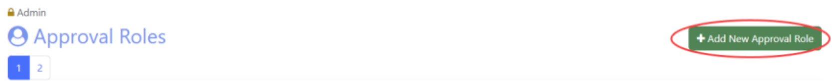
Granted	Permission	Description
Approval		
No	Admin	Allows users to define approval roles and approval routes.
Yes	Manage	Allows users to manage approval roles (add or remove people).
Yes	View	Allows users to view approval routes.

Approval Roles

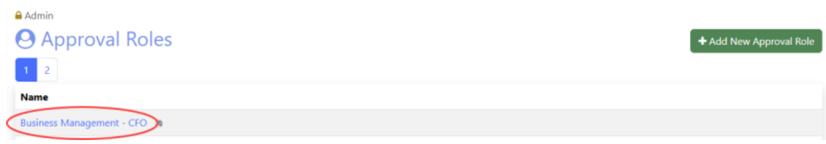
99. To view the existing Approval Roles, click on the Approval Roles hyperlink in the Admin frame.



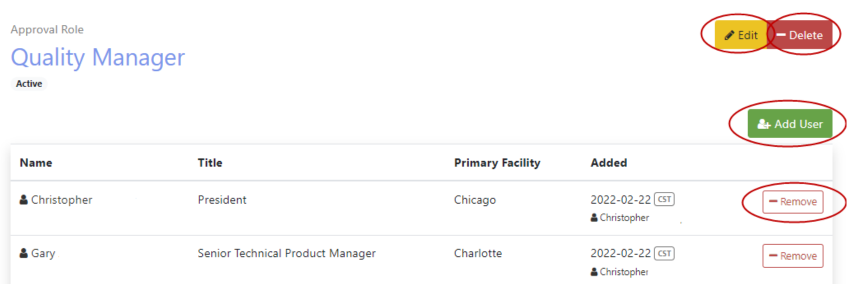
100. PatrolSuite comes with a selection of pre-defined approval roles pre-defined. To add a new role, click on the Add New Role button, enter the role name, and click on the Save Changes button.



101. To edit a role, click on the role name.

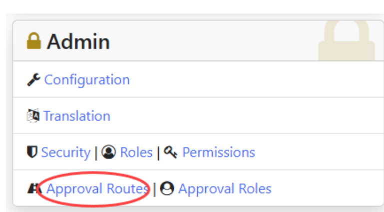


a. To add a user into a role, click on the Add User button.
b. To remove a user, click on the Remove button.
c. To edit the role, click on the Edit button.
d. To delete the role, click on the Delete button. Note that roles that are consumed in an approval route cannot be deleted.

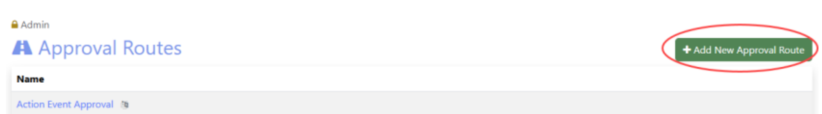


Approval Routes

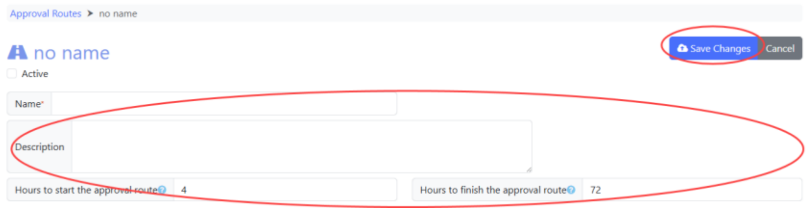
102. Click on the Approval Routes hyperlink in the Admin frame.



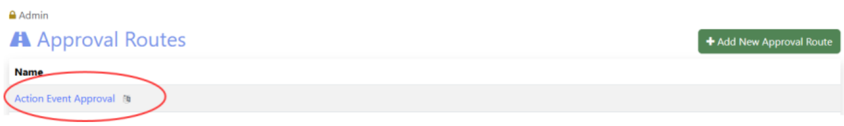
103. To add a new approval route, click on the Add New Approval Route button.



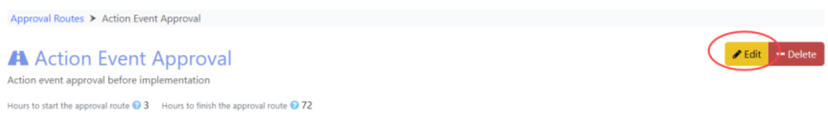
a. Enter the route name and description, enter the hours to start and to finish, and click on the Save Changes button.



104. To edit an approval route, click on the route name.

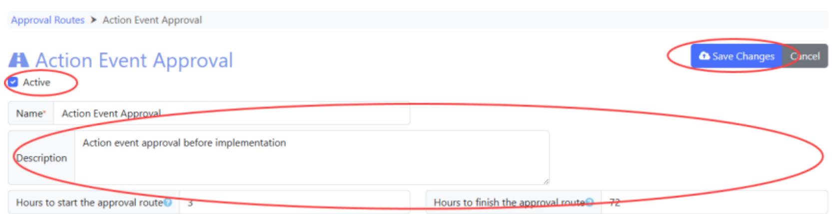


a. Click on the ‘Edit’ button.

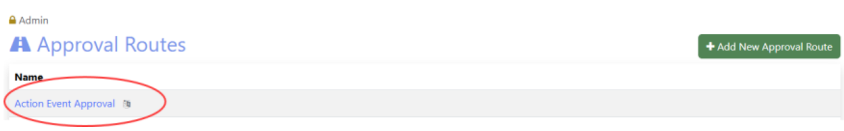


b. Enter the desired information and click the ‘Save Changes’ button.

Note: Click on the help icons for an explanation of the “Hours to…” fields.

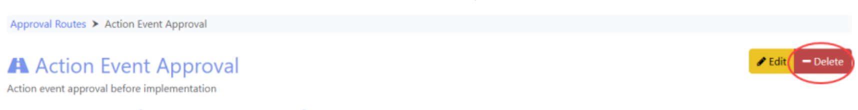


105. To delete an approval route, click on the route name.

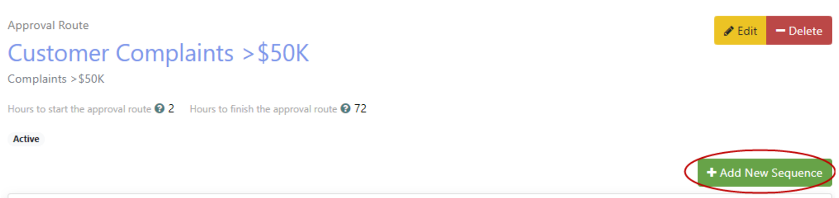


a. Click on the ‘Delete’ button and click on the ‘Delete’ button in the confirmation window.

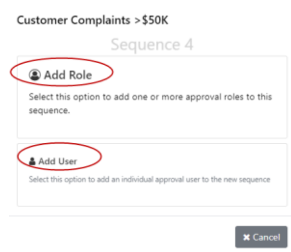
Note: A route cannot be deleted if it has previously been used to obtain an approval.



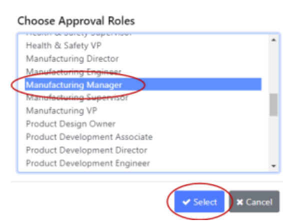
106. To add a new sequence to an approval route, click on the ‘Add New Sequence’ button. Approval routes are organized by sequences.



a. One or more individual users or roles can be added into a sequence. Click the Add Role or Add User option box.

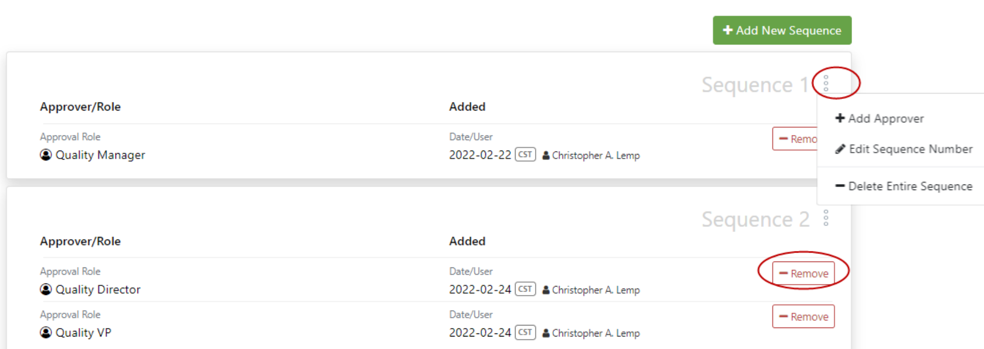


b. Choose the desired approval role, or select the desired individual user, and click the Select button.



107. To edit a sequence, including adding additional approves into a sequence, changing the sequence number, or deleting the sequence, click the ellipses icon and choose the desired action form the menu.

108. To remove an approver from a sequence, click on the Remove button.



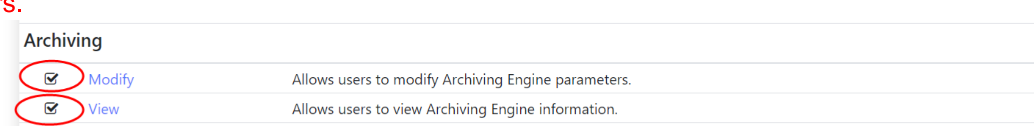
Chapter 11: Archiving

QualityPatrol Archiving Engine

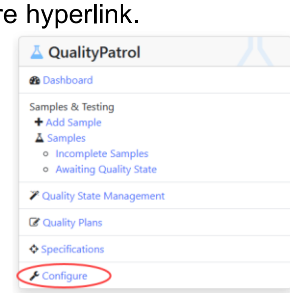
This page allows an administrator to manage archiving settings and to view the archiving log. As the size of the QualityPatrol database grows, a weekly or monthly archiving routine to move old data from the production database to the archive database will prevent performance degradation in the production environment.

The Archiving Engine license is not included in the QualityPatrol license and must be purchased separately. If your organization does not have the Archiving Engine license, then the functionality outlined below won't be actionable.

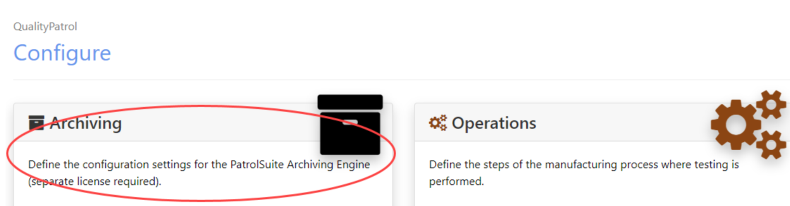
Users in a PatrolSuite Role with the following permissions granted can edit archiving settings. Caution should be given when making decisions regarding users who will be granted permission to modify archiving parameters.



109. Click on the QualityPatrol / Configure hyperlink.

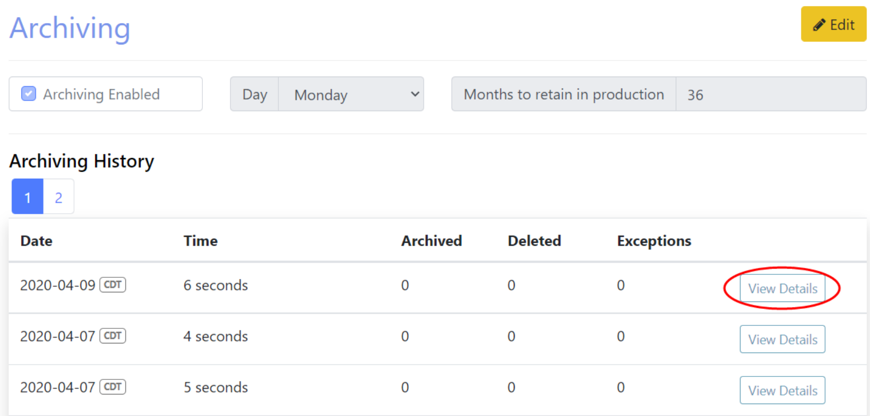


110. The QualityPatrol Configure page will appear. Click on the Archiving card.



111. The QualityPatrol Archiving Engine settings and log will be displayed. The archiving log displays the date of the most recent archiving event, and the duration of the event (time), and the number of data items archived, deleted, and the exceptions. Click on the 'View Details' button to see additional

information about the event.

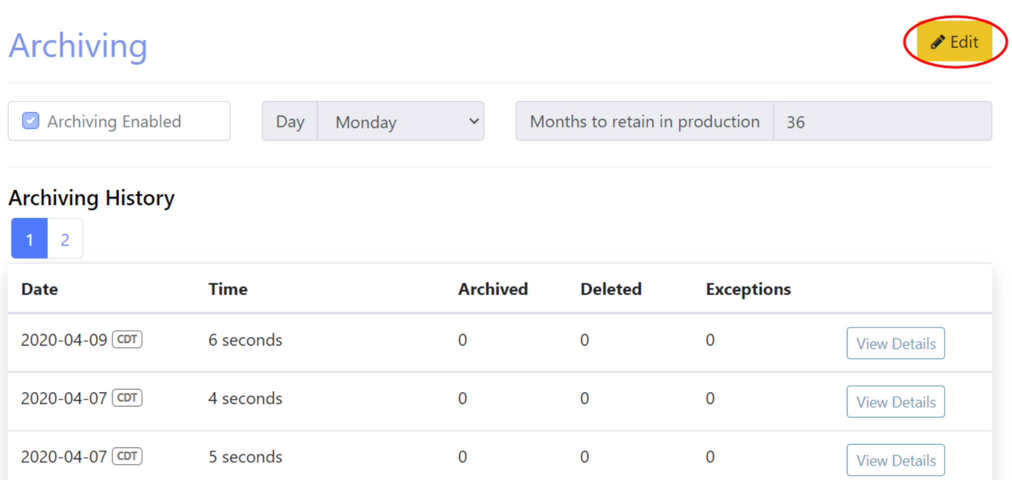


112. Click on the ‘Edit’ button to manage the archiving engine settings.

Archiving Enabled: The “Archiving Enabled” checkbox will appear if an Archiving Engine license has been purchased. Check the checkbox to activate the archiving engine.

Day: Choose the day of the week when archiving occurs.

Months of Data to Retain: Define how many months of data are retained in the production QualityPatrol system. To minimize network stress, if the Months of Data is decreased, then the Archiving Engine will process one additional month at a time each time archiving occurs, until the defined Months of Data is reached.

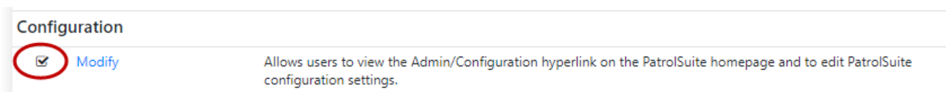


Chapter 12: Link Cards

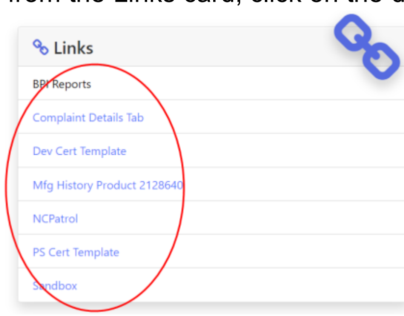
Link Card Overview

This feature enables an administrator to place “Link Cards” on the PatrolSuite homepage, and add hyperlinks to external webpages (i.e. webpages outside of PatrolSuite) within the card.

Users in a PatrolSuite Role with the following permissions granted can define link cards and the hyperlinks within them:

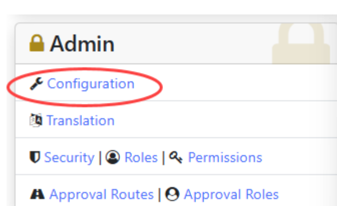


113. To access an external webpage from the Links card, click on the desired hyperlink.



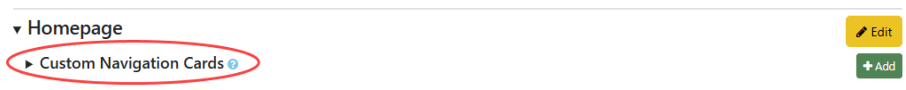
Link Card Content Management

114. To manage the links that appear in the Links card, click on the Configuration hyperlink in the Admin card on the PatrolSuite homepage:



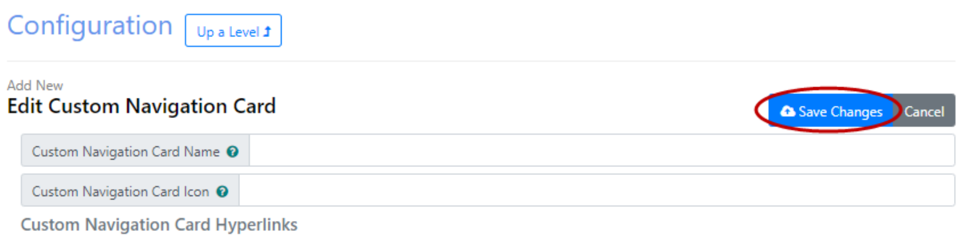
115. Click on the ‘Homepage’ text.

116. To view the existing Link Cards located on the PatrolSuite homepage, click on the “Custom Navigation Cards” text.

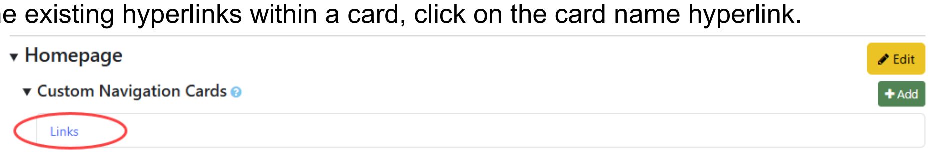


117. To add a new card, click on the ‘Add’ button.

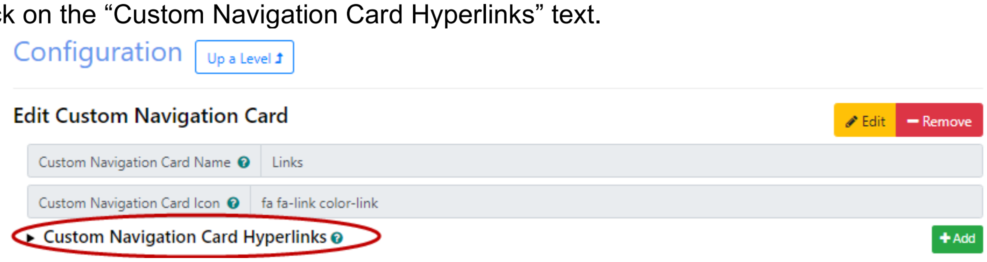
a. Enter the card name and the CSS class of the desired icon (Font Awesome 4.7), then click the ‘Save Changes’ button.



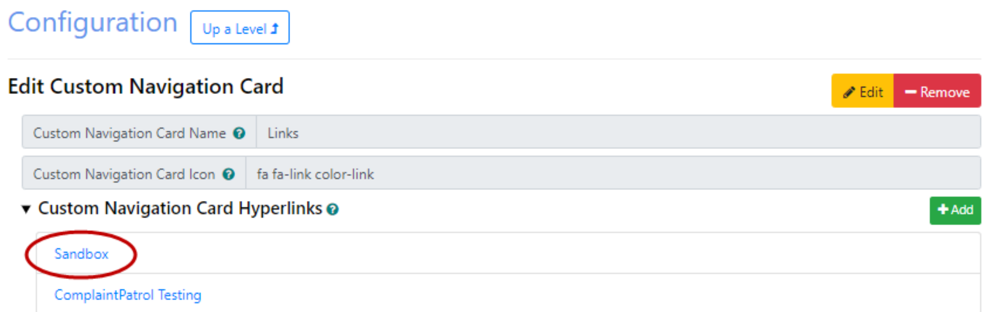
118. To view the existing hyperlinks within a card, click on the card name hyperlink.



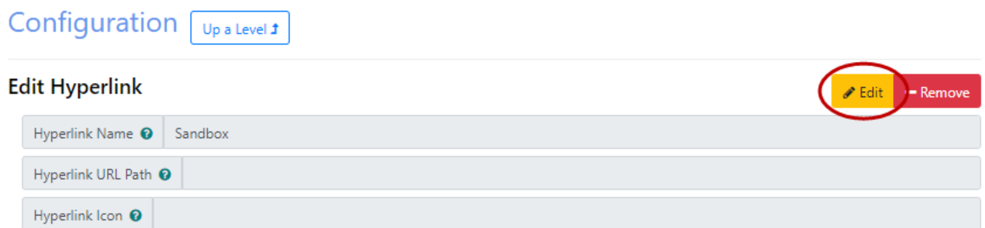
a. Click on the “Custom Navigation Card Hyperlinks” text.



119. To edit an existing hyperlink, click the desired hyperlink.



a. Click on the ‘Edit’ button, edit the information as desired, and click the ‘Save Changes’ button.



120. To add a new hyperlink within the selected card, click the ‘Add” button.

a. Enter the link name, path, and icon, and click the ‘Save Changes’ button.