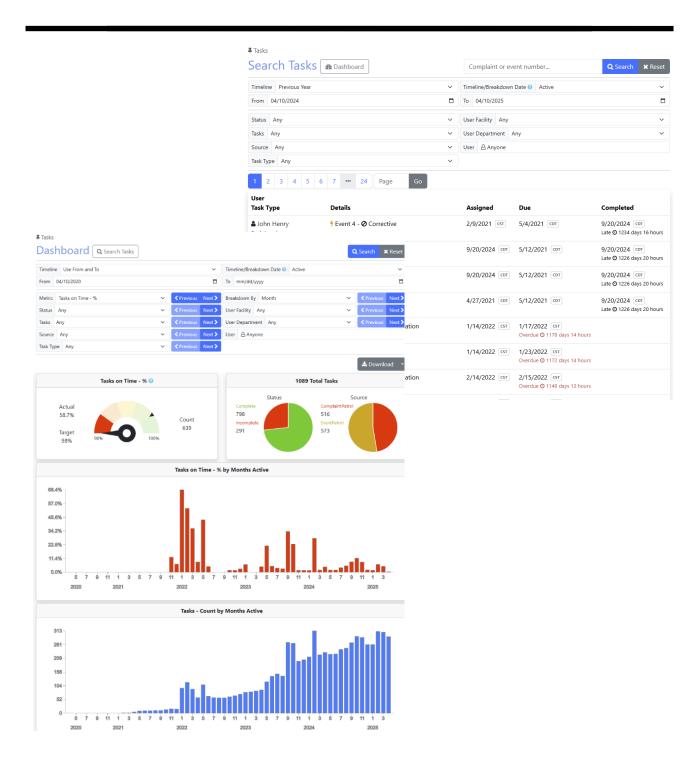
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#### Tasks & Notifications User Guide Version 2025-10



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### **Chapter 1: Introduction**

#### Introduction

The "My Tasks" and "Notification" pages provide a centralized location for users to view their assigned responsibilities and related updates within PatrolSuite™.

**Notifications** – Information that is relevant to a user but does not require a corresponding action. For example, a canceled audit is a notification because it does not require specific action.

**Tasks** – Actions that must be completed before a specific due date. For example, implementing a corrective action (such as updating a work instruction) is a task that must be completed before a due date.

#### 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** – 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

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window. This feature can be used to help ensure that all tests are performed as required.

**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.

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**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 set of data with a unique order number (typically originating from the MES or ERP) to identify 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.

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**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, the user will get a warning message.

**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 can be and 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

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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
B	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.

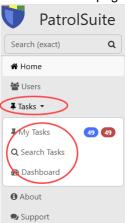


### **Chapter 2: Navigation**

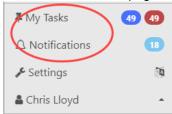
### Navigation to Dashboards, Notifications, and Tasks

There are several ways to navigate to the Dashboard, Notifications, and Tasks pages:

- 1. At the top of the PatrolSuite navigation bar, click on the Tasks dropdown and click on the desired submenu item.
  - a. My Tasks. Takes the user to the My Tasks page.
  - b. Search Tasks. Takes the user to the Search Tasks page without any filters applied.
  - c. Dashboard. Takes the user to the Task Dashboard page without any filters applied.



- 2. At the bottom of the navigation bar, click on the My Tasks or the Notifications menus.
  - a. My Tasks. Takes the user to the My Tasks page.
  - b. **Notifications**. Takes the user to his/her notifications page.



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- 3. From the My Tasks page, click on the desired button.
  - a. **Direct Reports**. To view tasks assigned to your direct reports, click on the 'Direct Reports' button.
  - b. **Search My Tasks**. To search tasks assigned to you, click on the 'Search My Tasks' button.

Note: The page will be pre-filtered to display your incomplete tasks.

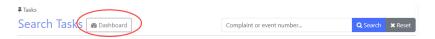
c. **My Dashboard**. To view the dashboard pre-filtered to your tasks, click on the 'My Dashboard' button.



- 4. From the Dashboard page, click on the 'Search Tasks' button.
  - Takes the user to the Search Tasks page pre-filtered retain any filters chosen on the Dashboard page.



- 5. From the Search Tasks page, click on the 'Dashboard' button.
  - a. Takes the user to the Dashboard page pre-filtered retain any filters chosen on the Search Tasks page.





### **Chapter 3: Email**

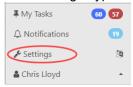
### **Introduction**

When PatrolSuite is integrated with the local email client, PatrolSuite can send users emails for new tasks, past due tasks, and task summaries. Contact MAP for a quote to perform this integration.

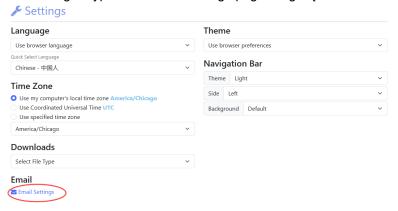
Page: {PatrolSuite URL}/Email

### **Email Settings**

6. To configure your email settings, click on the Settings hyperlink in the navigation bar.



a. Click on the 'Email Settings' hyperlink on the Settings page. Page: {PatrolSuite URL}/Home/Settings



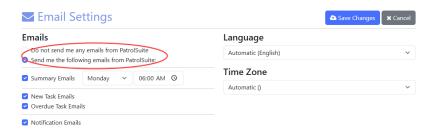
b. Click on the Edit button.



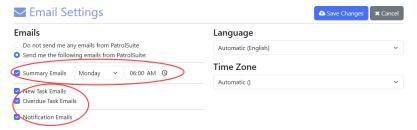
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c. Select the radio button to send, or not to send any emails from PatrolSuite.



d. If emails are to be sent from PatrolSuite, then check the checkbox to define what emails are sent.



**Summary** – Sends one email, on the day of the week chosen by the user, that provides a summary of incomplete and overdue tasks.



New Task - Sends one email when a task is assigned.



Overdue Task - Sends one email when a task becomes overdue.



Notification - Sends one email when a notification is received.

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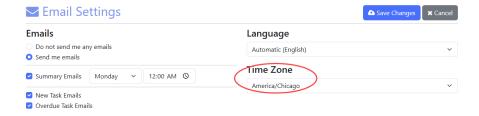
e. Choose the desired language for emails received from PatrolSuite. The default email language is "Automatic" which is the language that was applicable when the user last logged into PatrolSuite. Accordingly, if the email settings language is set to "Automatic," and subsequently the language is changed on the Settings page, the email settings language will not reflect the change until the user logs out/in again.

Note: For multi-lingual users who routinely change the language used to view PatrolSuite pages, MAP recommends choosing one email language so that all emails received from PatrolSuite are in the same language.



f. Choose the time zone for when the emails are sent from PatrolSuite. The default email time zone is "Automatic" which is the time zone that was applicable when the user last logged into PatrolSuite. Accordingly, if the email settings time zone is set to "Automatic," and subsequently the time zone is changed on the Settings page, the email settings time zone will not reflect the change until the user logs out/in again.

Note: For global users who routinely change the time zone used to view PatrolSuite data, MAP recommends choosing one email time zone so that all emails are sent by PatrolSuite using the same time zone.



g. Click the 'Save Changes' button.



### **Chapter 4: My Tasks**

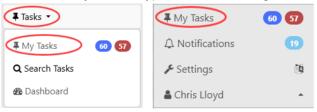
#### Introduction

The My Tasks page displays actions assigned to the logged in user (you). These task assignments could originate from any PatrolSuite module.

Page: {PatrolSuite URL}/Task

### View My Tasks

7. To view your tasks, click one of the "My Tasks" hyperlinks in the navigation bar.

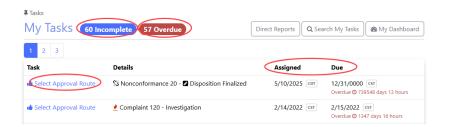


The My Tasks page is sorted by the task due date with the oldest date at the top.

- a. To view your incomplete tasks, click the blue 'Incomplete' button.
  - Note: The number of incomplete tasks is displayed within the button.
- b. To view your overdue tasks, click the red 'Overdue' button.
  - Note: The number of overdue tasks is displayed within the button.
- c. To change the sort order, click on the column headers for "Assigned" or "Due".
- d. To view a task, click on the task name hyperlink.

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### **Direct Reports**

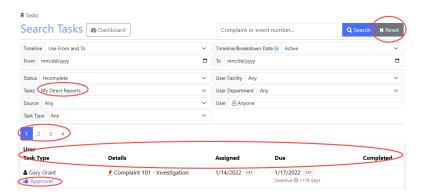
8. To view tasks assigned to your direct reports, click on the 'Direct Reports' button.

Note: Direct reports are defined by each user when he/she selects his/her "Reports To" on the Information tab of the user profile page.



The Search Tasks page will open pre-filtered to view only tasks assigned to your direct reports.

- a. Select the filters to locate tasks of interest.
- b. Click on the page numbers to view additional tasks.
- c. Click on the column headers to change the sort criteria and order.
- d. Click on the Task Type hyperlink to open the task.
- e. Click on the 'Reset' button to remove all filters.





### Search My Tasks

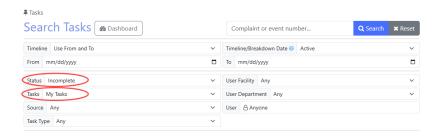
9. To search your tasks, open the My Tasks page and click on the 'Search My Tasks' button.



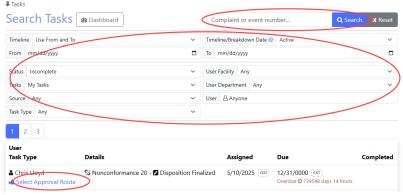
The Search Tasks page will open with two filters pre-selected:

Status = Incomplete. Your incomplete tasks will be displayed.

Tasks = My Tasks. Only your tasks will be displayed.



- a. To locate a task of interest, use the Search feature or the filters.
- b. To open a task, click on the task type hyperlink.



### **My Dashboard**

10. To search your dashboard, open the My Tasks page and click on the 'My Dashboard' button.

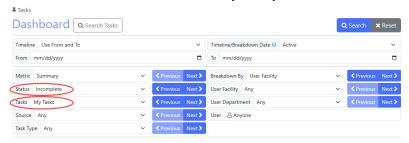




The Task Dashboard page will open with two filters pre-selected:

**Status** = Incomplete. The metrics will reflect data only from incomplete tasks.

Tasks = My Tasks. The metrics will reflect data only from your tasks.



See the subsequent Task Dashboard chapter for detailed information regarding the task dashboard.

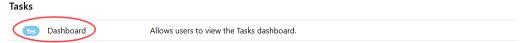
### **Chapter 5: Search Tasks**

#### **Introduction**

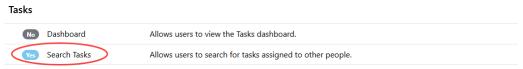
The Search Tasks page displays all actions assigned to any user from any PatrolSuite module.

Page: {PatrolSuite URL}/Task

Users in a PatrolSuite role with the following permission granted will have access to the Task Dashboard.



Users in a PatrolSuite role with the following permission granted will be able to search for tasks assigned to other users.

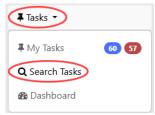


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#### **NEW** View Tasks

11. To view all tasks, click the "Tasks" dropdown in the PatrolSuite navigation bar and then click on the "Search Tasks" hyperlink in the submenu.



Note: Alternatively, click on the 'Search Tasks' button on the task Dashboard page.

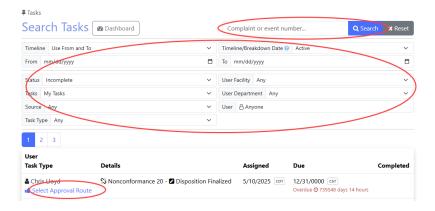


The Search Tasks page is sorted by the task due date with the oldest date at the top.

a. To find a task, use the Search feature or the filters.

Note: Enter a complaint or event number and click the 'Search' button to find tasks related to the complaint or event.

- b. To change the sort order, click on the column headers for "Assigned" or "Due."
- c. To open a task, click on the task type hyperlink.
- d. Click on the 'Reset' button to reset all filters.

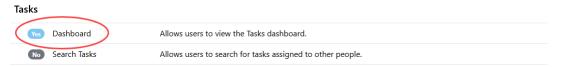




### **Chapter 6: Dashboard**

### **Introduction**

Users in a PatrolSuite role with the following permissions will have access to view the Task Dashboard:



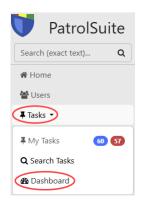
Page: {PatrolSuite URL}/Task/Dashboard

### **Metrics & Filtering**

12. To view the task dashboard, click the "Tasks" dropdown in the PatrolSuite navigation bar and then click on the "Dashboard" hyperlink in the submenu.

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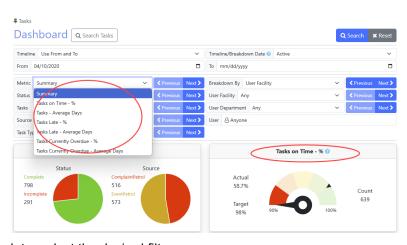
Note: Alternatively, click on the 'Dashboard' button on the My Tasks or Search Tasks page.



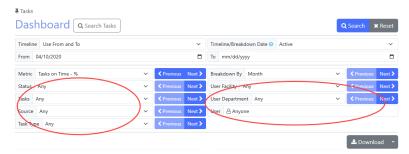
13. By default, the dashboard summary page is opened. This page provides an overview of popular task metrics. To view a specific task metric, select a desired metric, or click on the header of the desired metric card.

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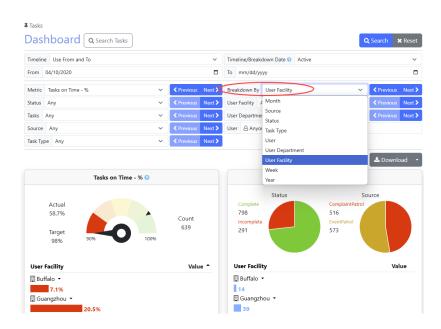
a. To filter the data, select the desired filters.



b. To breakdown the data based on a desired criterion, select the desired breakdown variable.

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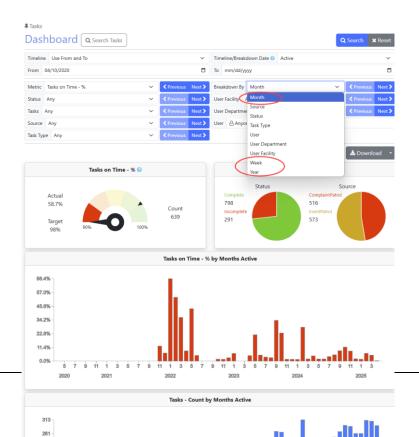
c. To breakdown the data based on a timeline, select the Month, Week, or Year breakdown variable.

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

