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Ecosystem

User Guide

Version 2025-10



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Chapter 1: Introduction


Introduction

The PatrolSuite™ Ecosystem refers to the interconnected set of external and internal data sources, systems, and standards that influence or control how PatrolSuite functions, integrates, operates, and evolves. Accordingly, the Ecosystem enables the management of data that informs, enables, constrains, or enhances the application's behavior, features, integrations, and performance.

Ecosystem data is typically managed by quality managers, often at the corporate level, with responsibility for quality and manufacturing compliance with internal and external policy and procedures. The Ecosystem card on the PatrolSuite homepage is typically not viewable by employees on the shop floor or in the QC laboratories.

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.

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.

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

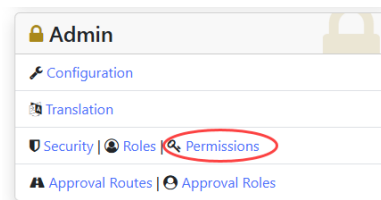


Chapter 2: Security

NEW Permissions

Permissions are located on Page: {PatrolSuite URL}/Security/Permissions

1. To access the Ecosystem permissions, click on the Permissions hyperlink in the Admin card on the PatrolSuite homepage.



2. Scroll down to the Ecosystem section. Each Ecosystem page has its own permission. This enables a granular allocation of management assignments.

Note: Permissions cannot be created; they are pre-defined. Please contact MAP if you have justification that supports adding a new permission.

3. To view the users who have been granted a permission, click on the permission name.

Ecosystem	
Admin	Allows users to edit all Ecosystem data.
Allow Manufacturing Order Spec Changes	Allows users to check/uncheck the Allow Spec Changes checkbox on the Manufacturing Orders page.
Manage Business Units	Allows users to edit the Ecosystem Business Unit data.
Manage Currencies	Allows users to edit the Ecosystem Currency data.
Manage Customers	Allows users to edit the Ecosystem Customer data.
Manage Product Defects	Allows users to edit the Ecosystem Product Defect data.
Manage Departments	Allows users to edit the Ecosystem Department data.
Manage Facilities	Allows users to edit the Ecosystem Facility data.
Manage Facility Manufacturing Info	Allows users to edit the Ecosystem Facility Manufacturing Information data.
Manage Markets	Allows users to edit the Ecosystem Market data.
Manage Manufacturing Orders	Allows users to manage manufacturing orders.
Manage Product Groups	Allows users to edit the Ecosystem Product Group data.
Manage Products	Allows users to edit the Ecosystem Product data.
Manage Suppliers	Allows users to edit the Ecosystem Supplier data.
Manage Units	Allows users to edit the Ecosystem Product Unit data.
Manage Units of Measure	Allows users to edit the Ecosystem Units of Measure data.
View	Allows users to view all Ecosystem pages.

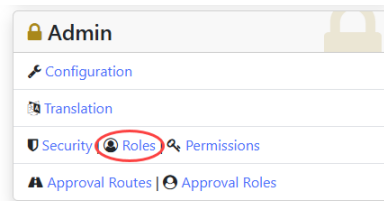
NEW Roles

Roles are located on Page: {PatrolSuite URL}/Security/Roles



To grant a user a permission, the user must be placed into a Role that has the permission activated. Roles are user defined.

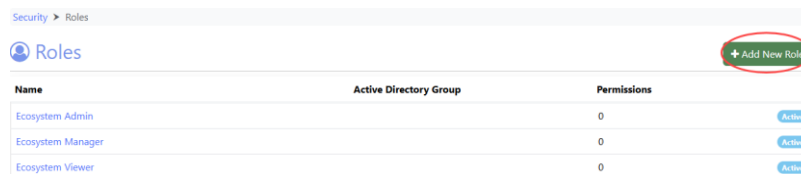
4. To access the PatrolSuite Roles, click on the Roles hyperlink in the Admin card on the PatrolSuite homepage.



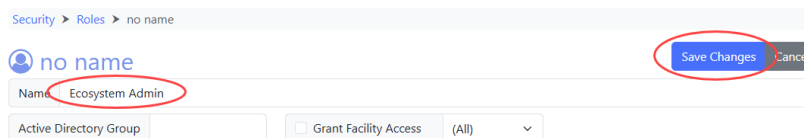
MAP recommends creating the following Ecosystem Roles:

- a. Ecosystem Admin
- b. Ecosystem Manager
- c. Ecosystem Viewer

5. To create a Role, click on the 'Add New Role' button.



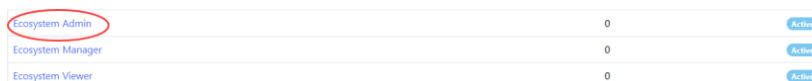
6. Enter the name of the role and click 'Save Changes'.



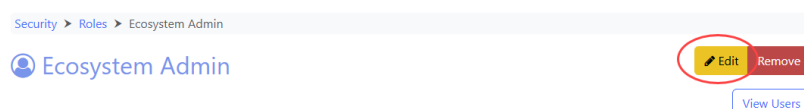
PatrolSuite security is integrated with Microsoft Active Directory. Each PatrolSuite Role must be associated with an Active Directory group.



7. Contact your IT department and request creating an Active Directory group for each PatrolSuite Role. The Active Directory group names are typically the same as the PatrolSuite Role name.
 - a. Provide the IT department with the names of all users who need to be added into each Active Directory group.
8. To associate the Active Directory group with the Role:
 - a. Click on the desired Role name.



- b. Click on the 'Edit' button.





- c. Enter the name of the applicable Active Directory group and click 'Save Changes.'

Security > Roles > Ecosystem Admin

Ecosystem Admin

Name: Ecosystem Admin

Active Directory Group: Ecosystem Admin ☐ Grant Facility Access (All) v

Save Changes **Cancel**

Note: Granting facility access is typically not done for an Ecosystem Role. Accordingly, MAP recommends leaving the Grant Facility Access checkbox unchecked.

9. To see the users who are in the Active Directory group associated with the Role, click the 'View Users' button.

Security > Roles > Ecosystem Admin

Ecosystem Admin

Edit **Remove**

View Users

10. To grant permissions to a PatrolSuite Role:

- a. Click on the desired Role name.

<u>Ecosystem Admin</u>	0	Action
Ecosystem Manager	0	Action
Ecosystem Viewer	0	Action

- b. Scroll down to the Ecosystem section and click on the 'No' button for the desired permission. This will change the button to read 'Yes' which means the permission has been granted to the Role, and therefore to all users in the Role.

The **Ecosystem Admin** Role typically includes the following permissions:

Ecosystem		
Yes	Admin	Allows users to edit all Ecosystem data.
Yes	Allow Manufacturing Order Spec Changes	Allows users to check/uncheck the Allow Spec Changes checkbox on the Manufacturing Orders page.
No	Manage Business Units	Allows users to edit the Ecosystem Business Unit data.
No	Manage Currencies	Allows users to edit the Ecosystem Currency data.
No	Manage Customers	Allows users to edit the Ecosystem Customer data.
No	Manage Product Defects	Allows users to edit the Ecosystem Product Defect data.
No	Manage Departments	Allows users to edit the Ecosystem Department data.
No	Manage Facilities	Allows users to edit the Ecosystem Facility data.
No	Manage Facility Manufacturing Info	Allows users to edit the Ecosystem Facility Manufacturing Information data.
No	Manage Markets	Allows users to edit the Ecosystem Market data.
No	Manage Manufacturing Orders	Allows users to manage manufacturing orders.
No	Manage Product Groups	Allows users to edit the Ecosystem Product Group data.
No	Manage Products	Allows users to edit the Ecosystem Product data.
No	Manage Suppliers	Allows users to edit the Ecosystem Supplier data.
No	Manage Units	Allows users to edit the Ecosystem Product Unit data.
No	Manage Units of Measure	Allows users to edit the Ecosystem Units of Measure data.
No	View	Allows users to view all Ecosystem pages.



The **Ecosystem Manager** Role typically includes the following permissions:

Ecosystem		
No	Admin	Allows users to edit all Ecosystem data.
No	Allow Manufacturing Order Spec Changes	Allows users to check/uncheck the Allow Spec Changes checkbox on the Manufacturing Orders page.
Yes	Manage Business Units	Allows users to edit the Ecosystem Business Unit data.
Yes	Manage Currencies	Allows users to edit the Ecosystem Currency data.
Yes	Manage Customers	Allows users to edit the Ecosystem Customer data.
Yes	Manage Product Defects	Allows users to edit the Ecosystem Product Defect data.
Yes	Manage Departments	Allows users to edit the Ecosystem Department data.
Yes	Manage Facilities	Allows users to edit the Ecosystem Facility data.
Yes	Manage Facility Manufacturing Info	Allows users to edit the Ecosystem Facility Manufacturing Information data.
Yes	Manage Markets	Allows users to edit the Ecosystem Market data.
Yes	Manage Manufacturing Orders	Allows users to manage manufacturing orders.
Yes	Manage Product Groups	Allows users to edit the Ecosystem Product Group data.
Yes	Manage Products	Allows users to edit the Ecosystem Product data.
Yes	Manage Suppliers	Allows users to edit the Ecosystem Supplier data.
Yes	Manage Units	Allows users to edit the Ecosystem Product Unit data.
Yes	Manage Units of Measure	Allows users to edit the Ecosystem Units of Measure data.
No	View	Allows users to view all Ecosystem pages.

The **Ecosystem Viewer** Role typically includes the following permissions:

Ecosystem		
No	Admin	Allows users to edit all Ecosystem data.
No	Allow Manufacturing Order Spec Changes	Allows users to check/uncheck the Allow Spec Changes checkbox on the Manufacturing Orders page.
No	Manage Business Units	Allows users to edit the Ecosystem Business Unit data.
No	Manage Currencies	Allows users to edit the Ecosystem Currency data.
No	Manage Customers	Allows users to edit the Ecosystem Customer data.
No	Manage Product Defects	Allows users to edit the Ecosystem Product Defect data.
No	Manage Departments	Allows users to edit the Ecosystem Department data.
No	Manage Facilities	Allows users to edit the Ecosystem Facility data.
No	Manage Facility Manufacturing Info	Allows users to edit the Ecosystem Facility Manufacturing Information data.
No	Manage Markets	Allows users to edit the Ecosystem Market data.
No	Manage Manufacturing Orders	Allows users to manage manufacturing orders.
No	Manage Product Groups	Allows users to edit the Ecosystem Product Group data.
No	Manage Products	Allows users to edit the Ecosystem Product data.
No	Manage Suppliers	Allows users to edit the Ecosystem Supplier data.
No	Manage Units	Allows users to edit the Ecosystem Product Unit data.
No	Manage Units of Measure	Allows users to edit the Ecosystem Units of Measure data.
Yes	View	Allows users to view all Ecosystem pages.



NEW Chapter 3: Business Partners

NEW Introduction

Business Partners include:

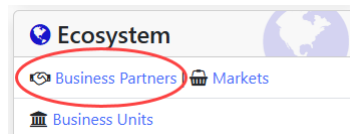
- Customers that purchase finished goods from your organization.
- Suppliers who provide your organization with raw materials or services.

Note: Business Partners are typically defined and managed in the ERP system and therefore may not be editable in PatrolSuite.

Business Partners are located on Page: {PatrolSuite URL}/Integration/Partners

NEW View & Search Partners

11. To view the Business Partners, click on the Ecosystem / Business Partners hyperlink.



12. To find a partner, enter the partner's name or number into the search box and click the Search button.

Ecosystem > Business Partners

Business Partners

Enter partner, customer, or supplier nu **Search** **Reset**

Priority	Any	Market	Any
Status	Any	Country	Any
Type	Any		

☐ View Deleted Items

Filters & Sorting

13. To filter the partners displayed on the Business Partners page, select the desired choice from any of the filter dropdowns.

Type – Customer or Supplier

Country – Where the partner is located



Priority – The relative level of importance or urgency assigned to a customer. Helps the business decide which customers or issues to handle first when resources are limited.

Market – The business market in which a customer operates

Status – Active or inactive. Inactive partners are displayed with gray strikethrough text.

Ecosystem > Business Partners

Business Partners

Enter partner, customer, or supplier n

Priority: Any Market: Any

Status: Any Country: Any

Type: Any

☐ View Deleted Items

1 2 3 4 5 6 7 ... 7126 Page

14. To view partners that have been deleted, check the 'View Deleted Items' checkbox. Deleted partners are displayed with red strikethrough text.

Ecosystem > Business Partners

Business Partners

70064060

Priority: Any Market: Any

Status: Any Country: Any

Type: Any

☒ View Deleted Items

Partner Number	Customer Number	Supplier Number	Name	City, State/Province Country	Priority	Market
70064060	70064060		CEBC ESSEX	ROSEDALE, MD US	2	Pharma

15. To sort the displayed partners, click on the desired column heading.

Ecosystem > Business Partners

Business Partners

Enter partner, customer, or supplier n

Priority: Any Market: Any

Status: Any Country: Any

Type: Any

☐ View Deleted Items

1 2 3 4 5 6 7 ... 7126 Page

Partner Number	Customer Number	Supplier Number	Name	City, State/Province Country	Priority	Market
SN-1234-11	SN-1234-11		Dupont Corporation	Memphis, Tennessee US		
SN-1234-10	SN-1234-10		Dupont Corporation	Charlotte, North Carolina US		

Indicates that the partner number is a “master partner” that may have one or more ship-to locations associated with it.

Indicates that the partner number is a “ship-to” location.



Add New Business Partner

16. To add a new business partner, click the 'New Business Partner' button.

The screenshot shows the 'Business Partners' page in the Ecosystem application. At the top, there's a search bar with the placeholder text 'Enter partner, customer, or supplier n' and buttons for 'Search' and 'Reset'. Below the search bar are several filter dropdowns: 'Priority' (Any), 'Status' (Any), 'Type' (Any), 'Market' (Any), and 'Country' (Any). There's also a 'View Deleted Items' checkbox. At the bottom, there's a pagination bar showing '1 2 3 4 5 6 7 ... 7126' and a 'Go' button. A red circle highlights the '+ New Business Partner' button located at the bottom right of the page.

- a. Enter the partner's information and click the 'Save Changes' button.

The screenshot shows the 'New Business Partner' form. At the top, there's a title 'New Business Partner' and a status indicator 'Active'. To the right of the title are buttons for 'Save Changes' and 'Cancel'. The form contains several input fields: 'Name*', 'Partner Number*', 'Customer Number', 'Supplier Number', 'Address', 'City', 'State/Province', 'Postal Code', 'Country' (a dropdown menu), 'Market' (a dropdown menu with 'None' selected), 'Priority' (a dropdown menu with 'None' selected), 'Contact', and 'Phone'. There's also a large text area for 'Description'.

Note: Name and Partner Number are required fields.

Note: A partner can be added without designating whether it's a customer or a supplier by leaving the 'Customer Number' and 'Supplier Number' fields empty.

Note: To designate a partner as a customer, enter a 'Partner Number' and a 'Customer Number'. The 'Partner Number' and 'Customer Number' may be different numbers, but typically they are the same number.

Note: To designate a partner as a supplier, enter a 'Partner Number' and a 'Supplier Number'. The 'Partner Number' and 'Supplier Number' may be different numbers, but typically they are the same number.

Note: To designate a partner as both a customer and a supplier, enter a 'Partner Number' and a 'Customer Number' and a 'Supplier Number'. The 'Partner Number' and 'Customer Number' and 'Supplier Number' may be different numbers.

Edit Business Partner

17. To edit a customer or a supplier, click on the partner's name hyperlink.



Partner Number	Customer Number	Supplier Number	Name	City, State/Province Country	Priority	Market
SN-1234-11	SN-1234-11		Dupont Corporation	Memphis, Tennessee US		
SN-1234-10	SN-1234-10		Dupont Corporation	Charlotte, North Carolina US		

b. To view the audit trail of changes to the partner, click the 'History' button.

Ecosystem > Business Partners > Dupont Corporation

SN-1234-10

Dupont Corporation Active

History Edit Delete

c. To edit the partner meta data, click the 'Edit' button. Make the desired changes and click the 'Save Changes' button.

SN-1234-10

Dupont Corporation Active

History Edit Delete

Partner Number SN-1234-10 Market

Customer Number SN-1234-10 Priority No priority

Supplier Number Contact Tracy Ledford

Address Phone

564 1st Street SW Description

Charlotte, North Carolina 28532

US

d. To delete a partner, click the 'Delete' button, then click on the 'Delete' button in the confirmation window.

Ecosystem > Business Partners > Dupont Corporation

SN-1234-10

Dupont Corporation Active

History Edit Delete

e. To add a new shipment location, click the 'New Shipment Location' button. Add the ship-to location information and click the 'Save Changes' button.

Ecosystem > Business Partners > Dupont Corporation

SN-1234-10

Dupont Corporation Active

History Edit Delete

Partner Number SN-1234-10 Market

Customer Number SN-1234-10 Priority No priority

Supplier Number Contact Tracy Ledford

Address Phone

564 1st Street SW Description

Charlotte, North Carolina 28532

US

Shipment Locations

+ New Shipment Location

Number	Name	City, State/Province Country	Priority	Market
SN-1234-11	Dupont Corporation	Memphis, Tennessee US	No priority	



- f. To edit an existing ship-to location, click on the location name. Make changes as desired and click the 'Save Changes' button.

Ecosystem > Business Partners > Dupont Corporation

SN-1234-10 History Edit Delete

Dupont Corporation Active

Partner Number SN-1234-10	Market
Customer Number SN-1234-10	Priority No priority
Supplier Number	Contact Tracy Ledford
Address	Phone
564 1st Street SW	Description
Charlotte, North Carolina 28532	
US	

Shipment Locations + New Shipment Location

Number	Name	City, State/Province Country	Priority	Market
SN-1234-11	Dupont Corporation	Memphis, Tennessee US	No priority	

- g. To view all products sold to this customer, see the Products Sold to this Customer card.

Note: This feature requires integration with the business system that contains the shipping orders by product/customer. If this information is currently not sent to PatrolSuite, contact MAP to request a quote. Typically, the integration is with an ERP or MES that contains "Outbound Shipping Orders" and/or "Inbound Receiving Orders" by product/customer. If your business systems do not provide Outbound Shipping or Inbound Receiving Orders by product/customer, then it may be possible to obtain this information from the Manufacturing Orders provided your manufacturing orders identify a real customer (i.e. the manufacturing orders are not make-to-stock).

Products Sold to this Customer

1 2 3 4 5 6 7 ... 134 Page Go

Product	Orders	First Order/Date	Latest Order/Date
12346 Better Butter Crème Deluxe	56	1910277 8/10/2017 CST	test-924 9/24/2025 CDT
703335 Cheesecake NY Strawberry	3	test-924 9/24/2025 CDT	test-924 9/24/2025 CDT



Chapter 4: Business Partner Markets

NEW Introduction

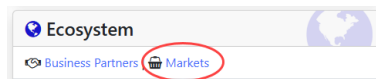
Markets apply to business partners (customers and suppliers) and reflect the market in which the partner operates. Markets have no effect on product testing or other quality tasks. Markets are used for reporting and metric purposes.

Note: Depending on the integration with the ERP system, Markets may not be editable in PatrolSuite.

Markets are located on Page: {PatrolSuite URL}/Integration/Markets

View Markets

18. To view the Markets, click on the Ecosystem / Markets hyperlink.



a. Use the Status dropdown to filter the list of Markets by active/inactive status.

Name	Code
Automotive	001
Consumer Goods	003

Add New Market

19. To add a new Market, click on the 'New Market' button.

Name	Code
Automotive	001
Consumer Goods	003



- a. Enter the Name, Code, and the Description and click 'Save Changes'.

The screenshot shows the 'New Market' form with the following fields: Name*, Code*, and Description. The 'Save Changes' button is circled in red.

Edit Markets

20. To edit a Market, click on the desired Market name.

The screenshot shows the 'Markets' list with the following data:

Name	Code
Automotive	001
Consumer Goods	003

- a. To localize the name of the Market, click on the localization icon, click on the 'Edit' button, enter the localized text, and click 'Save Changes'.

The screenshot shows the 'Automotive' market details with the following fields: Name (Automotive), Code (001), and Description (Automotive customers). The 'Edit' button is circled in red.

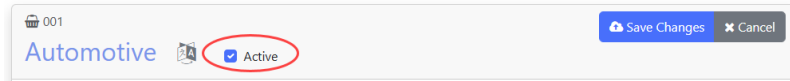
- b. To view the audit trail of changes to the Market, click on the 'History' button.


The screenshot shows the 'Automotive' market details with the following fields: Name (Automotive), Code (001), and Description (Automotive customers). The 'History' button is circled in red.

- c. To edit the Market, click on the 'Edit' button, change the text as desired, and click 'Save Changes'.

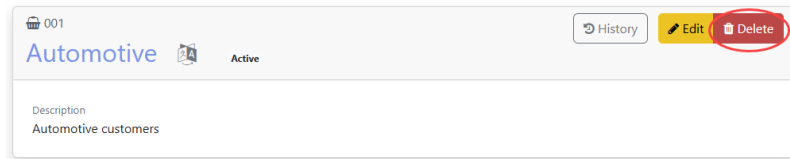
The screenshot shows the 'Automotive' market details with the following fields: Name (Automotive), Code (001), and Description (Automotive customers). The 'Edit' button is circled in red.


- i. To make a Market active or inactive, click in the 'Active' checkbox and click 'Save Changes'.
Checked = active. Unchecked = inactive.



001
Automotive  ☒ Active Save Changes Cancel

- d. To delete a Market, click on the 'Delete' button, then click on the 'Delete' button in the confirmation window.



001
Automotive  Active History Edit Delete

Description
Automotive customers



Chapter 5: Business Units

NEW Introduction

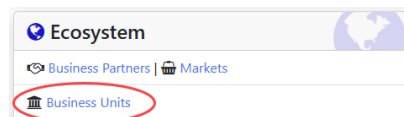
Business units are a group of manufacturing facilities according to the market to which their products are sold. Business units have no effect on product testing or other quality tasks. Business units are used for reporting and metric purposes.

Note: Depending on the integration with the ERP system, business units may not be editable in PatrolSuite.

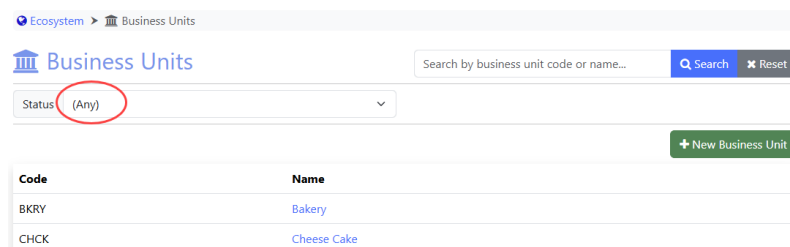
Business units are located on Page: {PatrolSuite URL}/Integration/BusinessUnits

View Business Units

21. To view the Business Units, click on the Ecosystem / Business Units hyperlink.



a. Use the Status dropdown to filter the list of Business Units by active/inactive status.



Add New Business Unit

22. To add a new business unit, click on the 'New Business Unit' button.



Ecosystem > Business Units

Business Units Search by business unit code or name... Search Reset

Status (Any) v

+ New Business Unit

Code	Name
BKRY	Bakery
CHCK	Cheese Cake

- a. Enter the Name, Code, and the Description and click 'Save Changes'.

New Business Unit Active

Save Changes Cancel

Name

Code

Description

Edit Business Units

23. To edit a business unit, click on the desired business unit name.

Ecosystem > Business Units

Business Units Search by business unit code or name... Search Reset

Status (Any) v

+ New Business Unit

Code	Name
BKRY	Bakery
CHCK	Cheese Cake

- a. To localize the name of the Business Unit, click on the localization icon, click on the 'Edit' button, enter the localized text, and click 'Save Changes'.

BKRY

Bakery Localization icon Active

Description

History Edit Delete

- b. To view the audit trail of changes to the Business Unit, click on the 'History' button.

BKRY

Bakery Localization icon Active

Description

History Edit Delete

- c. To edit the Business Unit, click on the 'Edit' button, change the text as desired, and click 'Save Changes'.

BKRY

Bakery Localization icon Active

Description

History Edit Delete

- i. To make a Business Unit active or inactive, click in the 'Active' checkbox and click 'Save Changes'. Checked = active. Unchecked = inactive.



The screenshot shows a web interface for managing a 'Bakery' business unit. At the top, there's a header with 'BKRY' and a 'Bakery' title. Below the title, there's a 'Name*' field containing 'Bakery'. To the right of the title, there's a status indicator 'Active' with a blue checkmark, which is circled in red. Further right, there are 'Save Changes' and 'Cancel' buttons.

- d. To delete a Business Unit, click on the 'Delete' button, then click on the 'Delete' button in the confirmation window.

The screenshot shows the same 'Bakery' management interface. In this view, the 'Active' checkbox is unchecked. To the right of the 'Active' status, there are three buttons: 'History', 'Edit', and 'Delete'. The 'Delete' button is circled in red.



NEW Chapter 6: Defect Categories

NEW Introduction

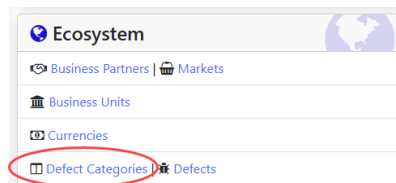
The Defect Categories page enables an administrator to define the categories in which all product defects will be placed. Defect Categories are used in modules such as nonconforming product and customer complaints, and in related dashboards.

Note: Depending on the integration with the ERP system, Defect Categories may not be editable in PatrolSuite.

Defect Categories are located on Page: {PatrolSuite URL}/Integration/DefectCategories

View Categories

24. To view the Defect Categories, click on the Ecosystem / Defect Categories hyperlink.



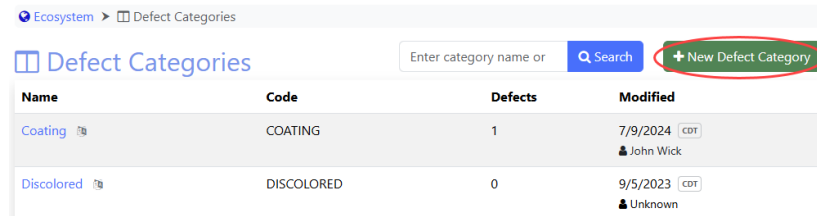
- Enter a category name or code into the search cell to search for a category.
- Click on the column header to change the sort order.

Ecosystem > Defect Categories			
Defect Categories		Enter category name or	Search
New Defect Category			
Name	Code	Defects	Modified
Coating	COATING	1	7/9/2024 CDT John Wick
Discolored	DISCOLORED	0	9/5/2023 CDT Unknown

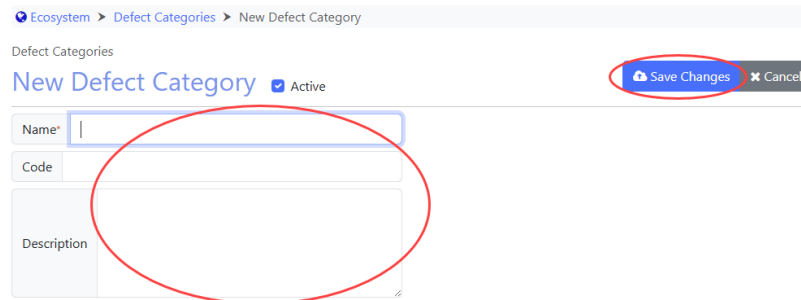


Add New Category

25. To add a new defect category, click on the 'New Defect Category' button.

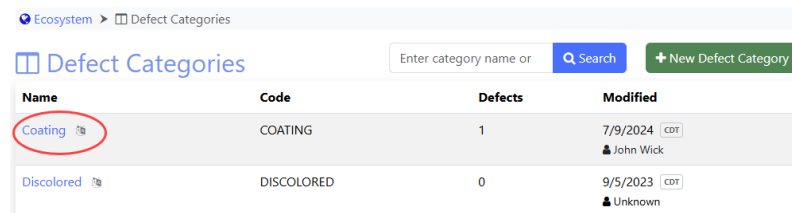


- a. Enter the Name, Code, and the Description and click 'Save Changes'.

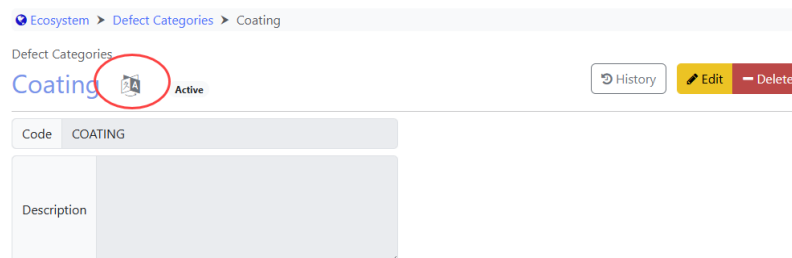


Edit Categories

26. To edit a defect category, click on the desired defect category name.



- a. To localize the name of the defect category, click on the localization icon, click on the 'Edit' button, enter the localized text, and click 'Save Changes'.




- b. To view the audit trail of changes to the defect category, click on the 'History' button.



Ecosystem > Defect Categories > Coating

Defect Categories

Coating  Active

History Edit Delete


Code COATING

Description

- c. To edit the defect category, click on the 'Edit' button, change the information as desired, and click 'Save Changes'.

Ecosystem > Defect Categories > Coating

Defect Categories

Coating  Active

History Edit Delete


Code COATING

Description

- i. To make a defect category active or inactive, click in the 'Active' checkbox and click 'Save Changes'. Checked = active. Unchecked = inactive.

Ecosystem > Defect Categories > Coating

Defect Categories


Coating  ☒ Active

Save Changes Cancel

- d. To delete a defect category, click on the 'Delete' button, then click on the 'Delete' button in the confirmation window.

Ecosystem > Defect Categories > Coating

Defect Categories

Coating  Active

History Edit Delete



NEW Chapter 7: Defects

NEW Introduction

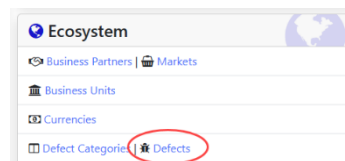
The Defects page enables an administrator to define the global population of product defects. Defects are used in modules such as nonconforming product and customer complaints, and in related dashboards.

Note: Depending on the integration with the ERP system, Defects may not be editable in PatrolSuite.

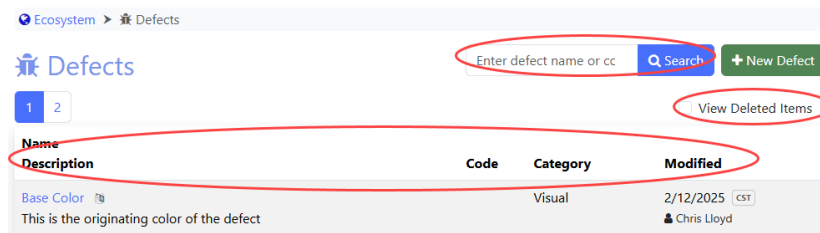
Defects are located on Page: {PatrolSuite URL}/Integration/Defects

View Defects

27. To view the Defects, click on the Ecosystem / Defects hyperlink.



- Enter a defect name or code into the search cell to search for a defect.
- Check the View Deleted Items checkbox to view deleted defects.
- Click on the column header to change the sort order.



Add New Defect

28. To add a new defect, click on the 'New Defect' button.



Ecosystem > Defects

Defects

Enter defect name or cc

☐ View Deleted Items

Name	Code	Category	Modified
Description			
Base Color		Visual	2/12/2025 <small>CST</small>
This is the originating color of the defect			Chris Lloyd

- a. Enter the Name, Category, Code, and the Description and click 'Save Changes'.

Ecosystem > Defects > New Defect

Defects

New Defect ☒ Active

Name*

Category

Code

Description

Edit Defects

29. To edit a defect, click on the desired defect name.

Ecosystem > Defects

Defects

Enter defect name or cc

☐ View Deleted Items

Name	Code	Category	Modified
Description			
Base Color		Visual	2/12/2025 <small>CST</small>
This is the originating color of the defect			Chris Lloyd

- a. To localize the name of the defect, click on the localization icon, click on the 'Edit' button, enter the localized text, and click 'Save Changes'.

Ecosystem > Defects > Base Color

Defects

Base Color ☒ Active

This is the originating color of the defect

Category

Code


Description


- b. To view the audit trail of changes to the defect, click on the 'History' button.



Ecosystem > Defects > Base Color

Defects

Base Color  Active

This is the originating color of the defect 

Category Visual

Code


Description This is the originating color of the defect


History Edit Delete

- c. To edit the defect, click on the 'Edit' button, change the information as desired, and click 'Save Changes'.

Ecosystem > Defects > Base Color

Defects

Base Color  Active

This is the originating color of the defect 

Category Visual

Code


Description This is the originating color of the defect


History Edit Delete

- i. To make a defect active or inactive, click in the 'Active' checkbox and click 'Save Changes'.
Checked = active. Unchecked = inactive.

Ecosystem > Defects > Base Color

Defects

Base Color  ☒ Active


This is the originating color of the defect 


Save Changes Cancel

- d. To delete a defect, click on the 'Delete' button, then click on the 'Delete' button in the confirmation window.

Ecosystem > Defects > Base Color

Defects

Base Color  Active

This is the originating color of the defect 

Category Visual

Code

Description This is the originating color of the defect

History Edit Delete



Chapter 8: Departments

NEW Introduction

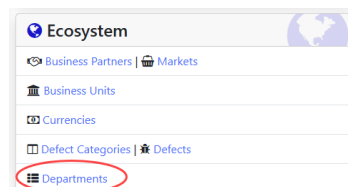
The Departments page enables an administrator to define the global population of departments that make up the organization. Departments have no effect on product testing. Departments are used in modules such as AuditPatrol, ComplaintPatrol, EventPatrol for reporting and metric purposes.

Note: Depending on the integration with the ERP system, Departments may not be editable in PatrolSuite.

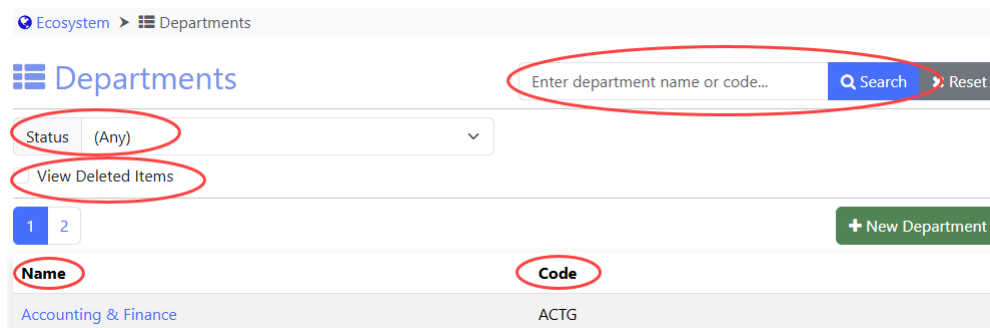
Departments are located on Page: {PatrolSuite URL}/Integration/Departments

View Departments

30. To view the Departments, click on the Ecosystem / Departments hyperlink.



- Enter a department name or code into the search cell to search for a defect.
- Use the Status dropdown to filter the departments by active/inactive status.
- Check the View Deleted Items checkbox to view deleted departments.
- Click on the column header to change the sort order.





Add New Department

31. To add a new department, click on the 'New Department' button.

The screenshot shows the 'Departments' page in the Ecosystem application. At the top, there is a search bar with the text 'Enter department name or code...' and buttons for 'Search' and 'Reset'. Below the search bar, there is a status filter set to '(Any)' and a checkbox for 'View Deleted Items'. A table lists departments with columns 'Name' and 'Code'. The first row shows 'Accounting & Finance' with code 'ACTG'. A green button labeled '+ New Department' is circled in red.

a. Enter the Name, Code, and the Description and click 'Save Changes'.

The screenshot shows the 'New Department' form. It has fields for 'Name*', 'Code*', and 'Description'. The 'Save Changes' button is circled in red. The form is titled 'New Department' and has a status indicator 'Active'.

Edit Departments

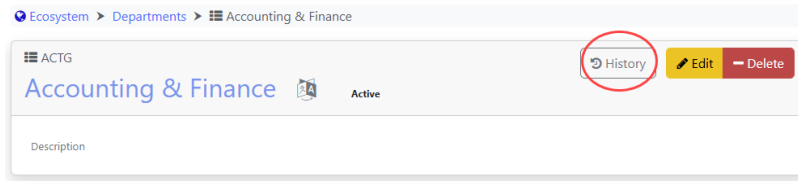
32. To edit a department, click on the desired department name.

The screenshot shows the 'Departments' page. The 'Accounting & Finance' department name is circled in red. The page includes a search bar, status filter, and a table with columns 'Name' and 'Code'. A green button labeled '+ New Department' is also visible.

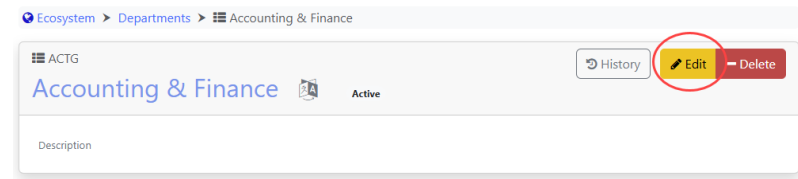
a. To localize the name of the department, click on the localization icon, click on the 'Edit' button, enter the localized text, and click 'Save Changes'.

The screenshot shows the 'Accounting & Finance' department edit page. It has a title 'Accounting & Finance' and a status indicator 'Active'. There is a localization icon (a small globe) circled in red, and buttons for 'History', 'Edit', and 'Delete'.

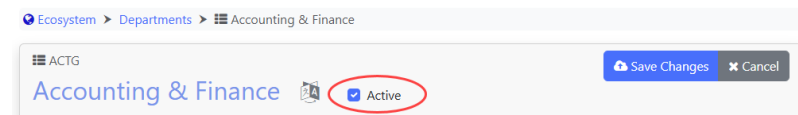
b. To view the audit trail of changes to the department, click on the 'History' button.



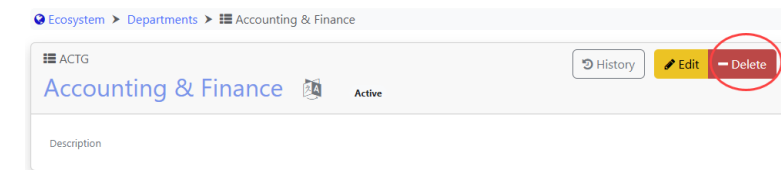
- c. To edit the department, click on the 'Edit' button, change the information as desired, and click 'Save Changes'.



- i. To make a department active or inactive, click in the 'Active' checkbox and click 'Save Changes'.
Checked = Active. Unchecked = Inactive.



- d. To delete a department, click on the 'Delete' button, then click on the 'Delete' button in the confirmation window.





Chapter 9: Facilities

NEW Introduction

The facilities page enables an administrator to define the facilities that make up the organization. Facilities can include manufacturing plants, corporate headquarters, off-site warehouses, R&D centers, and customer service centers.

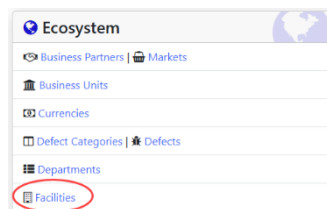
Note: Facilities require a PatrolSuite license to enable users located at that facility to access PatrolSuite. Contact MAP if you have questions about facility licenses.

Note: Depending on the integration with the ERP system, facilities may not be editable in PatrolSuite.

Facilities are located on Page: {PatrolSuite URL}/Integration/Facilities

View Facilities

33. To view the facilities, click on the Ecosystem / Facilities hyperlink.



- Enter a facility name or code into the search cell to search for a facility.
- Use the Business Unit dropdown to filter the facilities by business unit.
- Use the Status dropdown to filter the facilities by active/inactive status. Inactive facilities will appear with gray strikethrough text.
- NEW** Check the View Deleted Items checkbox to view deleted facilities. Deleted facilities will appear with red strikethrough text
- Click on the column header to change the sort order.



Ecosystem > Facilities

Facilities

Enter facility name or code...

Search

Business Unit (Any) Status (Any)

View Deleted Items

+ New Facility

Name	Number	City, State/Province Country	Business Unit
Arlington	1287	Arlington, TN	TCCS
Brownsville	1003	Brownsville, TX	Protein

Add New Facility

34. To add a new facility, click on the 'New Facility' button.

Ecosystem > Facilities

Facilities

Enter facility name or code...

Search

Business Unit (Any) Status (Any)

View Deleted Items

+ New Facility

- a. Enter the Name, Code, Business Unit, Description, and contact information and click 'Save Changes'.

Note: The PatrolSuite facility code must align with the facility code used for manufacturing orders.

Ecosystem > Facilities > New Facility

Active

Save Changes Cancel

Name* Phone

Code* Address

Business Unit Select City

Description State/Province

Postal Code

Country Select

Fax

Web

NEW Facility Information

35. To edit facility information, click on the desired facility name.



Ecosystem > Facilities

Facilities

Business Unit (Any) Status (Any)

☐ View Deleted Items

1 2

Name	Number	City, State/Province Country	Business Unit
Arlington	1287	Arlington, TN	TCCS
Brownsville	1003	Brownsville, TX	Protein

- If not already selected, click on the 'Facility Information' tab.
- To view the audit trail of changes to the facility information, click on the 'History' button.

Ecosystem > Facilities > Arlington

1287

Arlington Active

Facility Information Manufacturing Lines Operations Workcenters Pattern Rules Test Locations

Facility Information

Name Arlington Phone 555-555-5555

Code 1287 Address 8792 Knoll Drive

Business Unit TCCS Arlington, TN 38002

Description United States

Fax 654-528-9322

Web www.companyname.com

- To edit the facility information, click on the 'Edit' button, change the information as desired, and click 'Save Changes'.

Ecosystem > Facilities > Arlington

1287

Arlington Active

Facility Information Manufacturing Lines Operations Workcenters Pattern Rules Test Locations

Facility Information

Name Arlington Phone 555-555-5555

Code 1287 Address 8792 Knoll Drive

Business Unit TCCS Arlington, TN 38002

Description United States

Fax 654-528-9322

Web www.companyname.com

- To make a facility active or inactive, click in the 'Active' checkbox and click 'Save Changes'.
Checked = Active. Unchecked = Inactive.

Ecosystem > Facilities > Arlington

1287

Arlington Active

Facility Information Manufacturing Lines Operations Workcenters Pattern Rules Test Locations

Facility Information

Name* Arlington ☒ Active Phone 555-555-5555

- To delete a facility, click on the 'Delete' button, then click on the 'Delete' button in the confirmation window.



Ecosystem > Facilities > Arlington

1287

Arlington Active

Facility Information Manufacturing Lines Operations Workcenters Pattern Rules Test Locations

Facility Information

History Edit Delete

Name Arlington Phone 555-555-5555
Code 1287 Address 8792 Knoll Drive
Business Unit TCCS Arlington, TN 38002
Description United States
Fax 654-528-9322
Web www.companyname.com

Manufacturing Lines

The Manufacturing Lines tab displays the manufacturing lines for the chosen facility. A manufacturing line is defined as a sequence of Workcenters. Depending on the manufacturing process, a line may have only one Workcenter, or it may have multiple Workcenters in a certain sequence. At least one Workcenter must be chosen to create a line. Manufacturing lines have no effect on product testing.

Note: A facilities' manufacturing lines must be defined before DashPatrol can display alarm dashboards for the facility.

36. To view the manufacturing lines for the chosen facility, click on the Manufacturing Lines tab.
- a. Check the View Deleted Items checkbox to view deleted manufacturing lines. Deleted manufacturing lines will appear with red strikethrough text.

Ecosystem > Facilities > Arlington

1287

Arlington Active

Facility Information Manufacturing Lines Operations Workcenters Pattern Rules Test Locations

Manufacturing Lines

+ Add Manufacturing Line

View Deleted Items

Name	Code	Description
Line 2	BWL2	
Line 3	BL3	

37. To add a new manufacturing line, click on the 'Add Manufacturing Line' button.

Ecosystem > Facilities > Arlington

1287

Arlington Active

Facility Information Manufacturing Lines Operations Workcenters Pattern Rules Test Locations

Manufacturing Lines

+ Add Manufacturing Line

View Deleted Items

- a. Enter the Name, Code, and description. Then click the 'Save Changes' button.

Note: The PatrolSuite line code must align with the line code used for manufacturing orders.



Ecosystem > Facilities > Arlington > New Manufacturing Line

Arlington

New Manufacturing Line Active

Save Changes Cancel

Name* Code*

Description

38. To add a workcenter to the line, click on the drop-down list to the left of the 'Add Workcenter' button and choose the desired workcenter.

a. Click the 'Add Workcenter' button.

Note: At least one workcenter must be associated with a manufacturing line.

Note: A workcenter can be associated with more than one manufacturing line.

Ecosystem > Facilities > Arlington > Line 1

Arlington

Manufacturing Line

Line 1 Active

History Edit Delete

Workcenters

ARL_Bowl1

ARL_Bowl1

ARL_Bowl2

ARL_Bowl3

+ Add Workcenter

39. If a line has more than one workcenter, place the workcenters in the sequence that reflects the actual sequence of steps for the manufacturing line. To edit the sequence of a workcenter, click on its 'Move' button.

Ecosystem > Facilities > Arlington > Line 1

Arlington

Manufacturing Line

Line 1 Active

History Edit Delete

Workcenters

+ Add Workcenter

Name	Sequence	
ARL_Bowl1	1	Move Remove
ARL_Bowl2	2	Move Remove

a. Click on the 'Move Here' button that reflects the desired destination:



Ecosystem > Facilities > Arlington > Line 1

Arlington
Manufacturing Line

Line 1 Active

History Edit Delete

Workcenters

Name	Sequence	
ARL_Bowl1	1 Move Here ▾	Remove
ARL_Bowl2	2 X Cancel	Remove
	Move Here ▾	

40. To remove a workcenter from a manufacturing line, click the 'Remove' button.

Ecosystem > Facilities > Arlington > Line 1

Arlington
Manufacturing Line

Line 1 Active

History Edit Delete

Workcenters

Name	Sequence	
ARL_Bowl1	1 Move ▾	Remove
ARL_Bowl2	2 Move ▾	Remove

41. To edit a manufacturing line, click on the line name.

Ecosystem > Facilities > Arlington

1287

Arlington Active

Facility Information Manufacturing Lines Operations Workcenters Pattern Rules Test Locations

Manufacturing Lines

View Deleted Items

Name	Code	Description
Line 1	BWL1	
Line 2	BWL2	
Line 3	BL3	

+ Add Manufacturing Line

a. To view the audit trail of changes to the manufacturing line information, click on the 'History' button.

Ecosystem > Facilities > Arlington > Line 2

Arlington
Manufacturing Line

Line 2 Active

History Edit Delete

b. To edit the manufacturing line information, click on the 'Edit' button, change the information as desired, and click 'Save Changes'.

Ecosystem > Facilities > Arlington > Line 2

Arlington
Manufacturing Line

Line 2 Active

History Edit Delete



- i. To make a manufacturing line active or inactive, click in the 'Active' checkbox and click 'Save Changes'. Checked = Active. Unchecked = Inactive.

The screenshot shows the 'Arlington' facility page with the 'Manufacturing Line' tab selected. The 'Line 2' entry is highlighted, and the 'Active' checkbox is checked and circled in red. The 'Save Changes' button is visible in the top right corner.

- c. To delete a manufacturing line, click on the 'Delete' button, then click on the 'Delete' button in the confirmation window.

The screenshot shows the 'Arlington' facility page with the 'Manufacturing Line' tab selected. The 'Line 2' entry is highlighted, and the 'Delete' button is circled in red. The 'History' and 'Edit' buttons are also visible.

Operations

The Operations tab is where the operations related to the facility are selected. Operations are used in numerous places throughout PatrolSuite, but perhaps most importantly, to define the inspection and testing requirements at different steps in the manufacturing process (i.e. quality plans).

42. To view operations that are related to a facility, click on the Operations tab.

Note: The global list of operations is not defined and managed here. The global list of operations is defined and managed on the QualityPatrol/Configure/Operations page.

The screenshot shows the 'Arlington' facility page with the 'Operations' tab selected. The 'Show Inactive' checkbox is unchecked. A table lists operations with columns for Name, Code, Workcenters, and Status. The first row shows an active operation with Name '12345', Code '1', and Status 'Active'. A 'Remove' button is visible next to the row.

Name	Code	Workcenters	Status
12345	1	1	Active

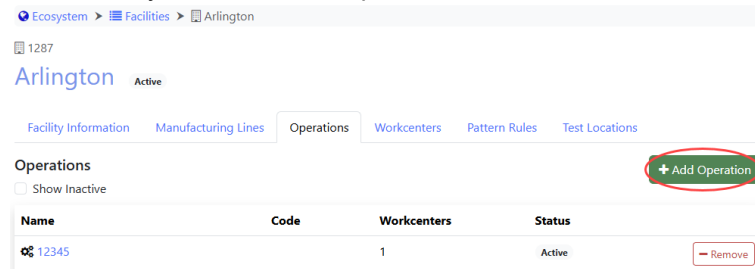
- a. To view inactive operations, check the Show Inactive checkbox. Inactive operations appear in gray strikethrough text. New quality plans cannot be created for inactive operations.

The screenshot shows the 'Arlington' facility page with the 'Operations' tab selected. The 'Show Inactive' checkbox is checked and circled in red. The table below shows the same active operation as the previous screenshot.

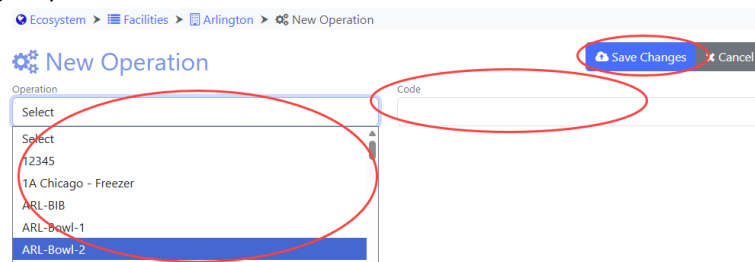
Name	Code	Workcenters	Status
12345	1	1	Active



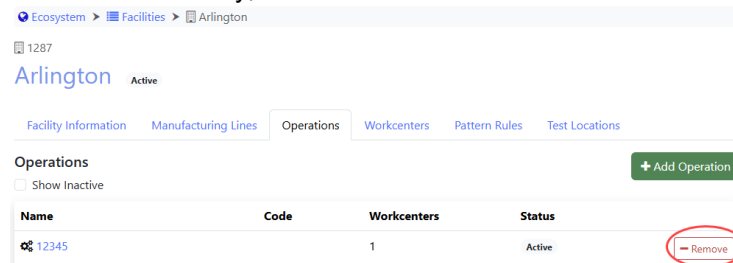
43. To add an operation to a facility, click the 'Add Operation' button.



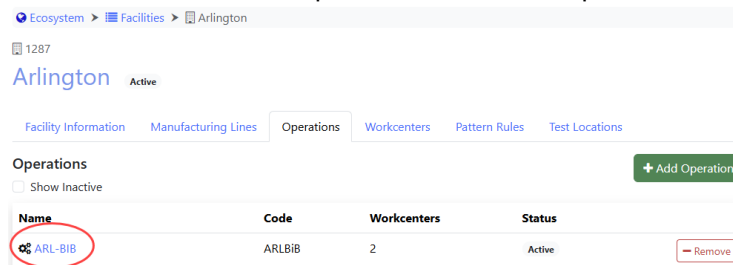
- a. Select the operation from the dropdown, enter the operation code, and click the 'Save Changes' button. The PatrolSuite operation code should be the same as the operation code used to identify this manufacturing step in the ERP or MES.



44. To remove an operation from the facility, click the 'Remove' button.



45. To view the workcenters associated with an operation, click on the operation name.



- a. To edit the operation, click the 'Edit' button.



Ecosystem > Facilities > Arlington > ARL-BIB

Operation (ARLBIB)

ARL-BIB

[Edit](#)

Workcenters [+ Select Workcenters](#)

Name	Code
<input checked="" type="radio"/> ARL-BIB-1	BIB-1
<input checked="" type="radio"/> xARL_BagInBox	PBIB

- b. Edit the code as desired and click 'Save Changes'. Note that since operations are managed on the QualityPatrol/Configure/Operations page, only the operation code is editable on this page.

Ecosystem > Facilities > Arlington > ARL-BIB

Operation (ARLBIB)

ARL-BIB

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

Operation

ARL-BIB

Code

ARLBIB

46. **NEW** To add a workcenter to, or remove a workcenter from, the operation, click the 'Select Workcenters' button.

Note: An operation no longer requires a workcenter to be associated with it. However, if an operation does have workcenters associated with it, then when adding samples in QualityPatrol, only those workcenters will be selectable.

Ecosystem > Facilities > Arlington > ARL-BIB

Operation (ARLBIB)

ARL-BIB

[Edit](#)

Workcenters [+ Select Workcenters](#)

Name	Code
<input checked="" type="radio"/> ARL-BIB-1	BIB-1
<input checked="" type="radio"/> xARL_BagInBox	PBIB

- a. Check the corresponding checkbox to add the workcenter. Uncheck the corresponding checkbox to remove the workcenter. Click the 'Save Changes' button.

Ecosystem > Facilities > Arlington > ARL-BIB

Operation (ARLBIB)

ARL-BIB

[Edit](#)

Select Workcenters [+ Select Workcenters](#)

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

<input checked="" type="checkbox"/> ARL_Bowl1 (PBWL1)	<input type="checkbox"/> ARL_RotaryFill1 (POT1)
<input type="checkbox"/> ARL_Bowl2 (PBWL2)	<input type="checkbox"/> ARL_Tote (PTOTE)
<input type="checkbox"/> xARL_Bowl3 (PBWL3)	<input type="checkbox"/> ARL_UnitPudding (PUPUD)
<input type="checkbox"/> ARL_Gallons (PGAL)	<input checked="" type="checkbox"/> ARL-BIB-1 (BIB-1)
<input type="checkbox"/> ARL_Liquid_Pail (PBLIQ)	<input type="checkbox"/> ARL-QCLab-Main
<input type="checkbox"/> ARL_OnTop2 (POT2)	<input type="checkbox"/> ARL-QCLab-Mirco
<input type="checkbox"/> ARL_OnTop8 (POT8)	<input type="checkbox"/> BVL_Line_3
<input type="checkbox"/> ARL_Prewhip_1F (PPWP1)	<input type="checkbox"/> Liquid Pails 03 (LP03)
<input type="checkbox"/> ARL_Prewhip_4F (PPWP3)	<input type="checkbox"/> xARL_5Lb_Pudding (PSPUD)
<input type="checkbox"/> ARL_Quarts (PORT)	<input checked="" type="checkbox"/> xARL_BagInBox (PBIB)



NEW Workcenters

Operations are divided into workcenters. For example, a “Filling” operation contains four workcenters (machines #1, #2, #3, and #4) where a liquid is poured into gallon containers. When a sample is initiated in QualityPatrol, the sample will identify from which workcenter (machine #1, #2, #3, or #4) the sample was taken.

Note: A PatrolSuite workcenter is often the equivalent to a “machine” in a MES.

NEW Note: An operation does not require a workcenter to be associated with it. However, if an operation does have workcenters associated with it, then when adding samples in QualityPatrol, only those workcenters will be selectable.

NEW Note: A workcenter can be related to more than one operation.

47. To view workcenters that are related to a facility, click on the Workcenters tab.

The screenshot shows the Ecosystem interface for the Arlington facility. The 'Workcenters' tab is selected and circled in red. Below the tabs, there is a 'View Deleted Items' checkbox and a '+ New Workcenter' button. A table lists two active workcenters:

Name	Code	Operations	Status
ARL_Bowl1	PBWL1	3	Active
ARL_Bowl2	PBWL2	3	Active

- a. To view deleted workcenters, check the View Deleted Items checkbox. Deleted workcenters appear in red strikethrough text. New samples cannot be created for workcenters that have been deleted.

The screenshot shows the Ecosystem interface for the Arlington facility with the 'View Deleted Items' checkbox checked and circled in red. The table now shows one workcenter in red strikethrough text:

Name	Code	Operations	Status
ARL_Bowl1	PBWL1	3	Active

48. To add a workcenter to a facility, click the ‘New Workcenter’ button.



Ecosystem > Facilities > Arlington

1287

Arlington Active

Facility Information Manufacturing Lines Operations Workcenters Pattern Rules Test Locations

Workcenters

☐ View Deleted Items

[+ New Workcenter](#)

Name	Code	Operations	Status
ARL_Bowl1	PBWL1	3	Active
ARL_Bowl2	PBWL2	3	Active

- a. Enter the workcenter name, code, and description and click the 'Save Changes' button. The PatrolSuite workcenter code should be the same as the workcenter code used to identify this machine in the ERP or MES.

Ecosystem > Facilities > Arlington > New Workcenter

Arlington

New Workcenter Active

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

Name *

Code

Description

49. To edit a workcenter, click on the workcenter name.

Ecosystem > Facilities > Arlington

1287

Arlington Active

Facility Information Manufacturing Lines Operations Workcenters Pattern Rules Test Locations

Workcenters

☒ View Deleted Items

[+ New Workcenter](#)

Name	Code	Operations	Status
ARL_Bowl1	PBWL1	3	Active

- a. To view the audit trail of changes to the workcenter, click on the 'History' button.

Ecosystem > Facilities > Arlington > ARL_Bowl1

Arlington

Workcenter (PBWL1)

ARL_Bowl1 Active

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

Description

Operations

[+ Select Operations](#)

Name	Code
ARL-Bowl-1	
Z-ARL-ProcessData-Bowl1	
ZARL-BOWL	

- b. To edit the workcenter, click on the 'Edit' button, change the information as desired, and click 'Save Changes'.



Ecosystem > Facilities > Arlington > ARL_Bowl1

Arlington
Workcenter (PBWL1)

ARL_Bowl1 Active

History Edit Delete

Description

Operations + Select Operations

Name	Code
ARL-Bowl-1	
Z-ARL-ProcessData-Bowl1	
ZARL-BOWL	

- i. To make a workcenter active or inactive, click in the 'Active' checkbox and click 'Save Changes'.
Checked = Active. Unchecked = Inactive.

Ecosystem > Facilities > Arlington > ARL_Bowl1

Arlington
Workcenter (PBWL1)

ARL_Bowl1 ☒ Active

Save Changes Cancel

Name*
ARL_Bowl1

Code
PBWL1

Description

- c. To delete a workcenter, click on the 'Delete' button, then click on the 'Delete' button in the confirmation window.

Ecosystem > Facilities > Arlington > ARL_Bowl1

Arlington
Workcenter (PBWL1)

ARL_Bowl1 Active

History Edit Delete

Description

Operations + Select Operations

Name	Code
ARL-Bowl-1	
Z-ARL-ProcessData-Bowl1	
ZARL-BOWL	

50. To view the operations associated with the workcenter, click on the workcenter name.

Ecosystem > Facilities > Arlington

1287

Arlington Active

Facility Information Manufacturing Lines Operations Workcenters Pattern Rules Test Locations

Workcenters + New Workcenter

☒ View Deleted Items

Name	Code	Operations	Status
ARL_Bowl1	PBWL1	3	Active



51. **NEW** To associate an operation with the workcenter, or to remove an operation from the workcenter, click on the 'Select Operations' button.

Note: A workcenter does not require an operation to be associated with it. However, if a workcenter has operations associated with it, then when adding samples in QualityPatrol, only those operations will be selectable.

The screenshot shows the Ecosystem interface for the Arlington Workcenter (PBWL1). The breadcrumb trail is Ecosystem > Facilities > Arlington > ARL_Bowl1. The main header shows 'ARL_Bowl1' as the active workcenter. Below the header, there is a table of operations. The 'Select Operations' button is highlighted with a red circle.

Name	Code
ARL-Bowl-1	
Z-ARL-ProcessData-Bowl1	
ZARL-BOWL	

- a. Check the corresponding checkbox to add the operation. Uncheck the corresponding checkbox to remove the operation. Click the 'Save Changes' button.

The screenshot shows the 'Select Operations' dialog box. It contains two columns of operations, each with a checkbox. The 'Save Changes' button is highlighted with a red circle.

Operation	Operation
<input checked="" type="checkbox"/> ARL-Bowl-1	<input type="checkbox"/> ARL-Pudding-Units
<input type="checkbox"/> ARL-Bowl-2	<input type="checkbox"/> ARL-PWP1
<input type="checkbox"/> ARL-Bowl-3	<input type="checkbox"/> ARL-PWP4
<input type="checkbox"/> ARL-Gallon	<input type="checkbox"/> ARL-QCLAB-Main
<input type="checkbox"/> ARL-LIQ	<input type="checkbox"/> ARL-QCLab-Micro
<input type="checkbox"/> ARL-OnTopBag-8	<input type="checkbox"/> ARL-Quart
<input type="checkbox"/> ARL-OnTopRotary-1 (A-OTR-1)	<input type="checkbox"/> ARL-Tote
<input type="checkbox"/> ARL-OnTopRotary-2	<input type="checkbox"/> BVL-Line-3 (BVL3)
<input type="checkbox"/> ARL-Pudding-5lb	<input checked="" type="checkbox"/> Z-ARL-ProcessData-Bowl1
	<input checked="" type="checkbox"/> ZARL-BOWL

52. **NEW** To remove the workcenter from an operation, return to the facility by clicking on the facility in the breadcrumb menu.

The screenshot shows the Ecosystem interface for the Arlington Workcenter (PBWL1). The breadcrumb trail is Ecosystem > Facilities > Arlington > ARL_Bowl1. The 'Arlington' link in the breadcrumb trail is highlighted with a red circle.

- a. Click on the Operations tab.



Ecosystem > Facilities > Arlington

1287

Arlington Active

Facility Information Manufacturing Lines **Operations** Workcenters Pattern Rules Test Locations

Operations + Add Operation

☐ Show Inactive

Name	Code	Workcenters	Status
ARL-BIB	ARLBIB	1	Active Remove
ARL-Bowl-1		1	Active Remove

b. Click on the desired operation.

Ecosystem > Facilities > Arlington

1287

Arlington Active

Facility Information Manufacturing Lines **Operations** Workcenters Pattern Rules Test Locations

Operations + Add Operation

☐ Show Inactive

Name	Code	Workcenters	Status
ARL-BIB	ARLBIB	1	Active Remove
ARL-Bowl-1		1	Active Remove

c. Click on the 'Select Workcenters' button.

Ecosystem > Facilities > Arlington > ARL-Bowl-1

Operation

ARL-Bowl-1 Edit

Workcenters + Select Workcenters

Name	Code
ARL_Bowl1	PBWL1

d. Uncheck the desired workcenter and click the 'Save Changes' button.

Ecosystem > Facilities > Arlington > ARL-Bowl-1

Operation

ARL-Bowl-1

Select Workcenters Save Changes Cancel

☒ ARL_Bowl1 (PBWL1)
☐ ARL_Bowl2 (PBWL2)
☐ ARL_Bowl3 (PBWL3)
☐ ARL_Gallons (PGAL)
☐ ARL_Liquid_Pail (PBLIQ)
☐ ARL_OnTop2 (POT2)
☐ ARL_OnTop8 (POT8)
☐ ARL_Prewhip_1F (PPWP1)
☐ ARL_Prewhip_4F (PPWP3)
☐ ARL_Quarts (PQRT)

☐ ARL_RotaryFill1 (POT1)
☐ ARL_Tote (PTOTE)
☐ ARL_UnitPudding (PUPUD)
☐ ARL-BIB-1 (BIB-1)
☐ ARL-QCLab-Main
☐ ARL-QCLab-Mirco
☒ BYL_Line_3
☐ Liquid Pails 03 (LP03)
☐ xARL_5Lb_Pudding (PSPUD)
☒ xARL_BagInBox (PBIB)



Pattern Rules

The Pattern Rules tab enables an administrator to define which statistical pattern rules are in use at the facility. If a pattern rule is “on” at the facility level, and the same pattern rule is turned “on” for a test method, then DashPatrol will identify when the pattern occurs for the test method.

53. To define which statistical pattern rules are in use at a facility, click the Pattern Rules tab and click the ‘Edit’ button.

Ecosystem > Facilities > Arlington

1287

Arlington Active

Facility Information Manufacturing Lines Operations Workcenters **Pattern Rules** Test Locations

Pattern Rules

Edit

Description	Status
5 Consecutive points increasing or decreasing	Off
6 Consecutive points increasing or decreasing	Off
7 Consecutive points increasing or decreasing	Off
4 out of 5 points beyond 1 standard deviation	On
2 out of 3 points beyond 2 standard deviations	On
1 Point beyond 3 standard deviations	On
8 Consecutive points on one side of the mean	Off

- a. Click the radio button to turn the pattern rule on or off, then click the ‘Save Changes’ button.

Ecosystem > Facilities > Arlington

1287

Arlington Active

Facility Information Manufacturing Lines Operations Workcenters **Pattern Rules** Test Locations

Pattern Rules

Save Changes Cancel

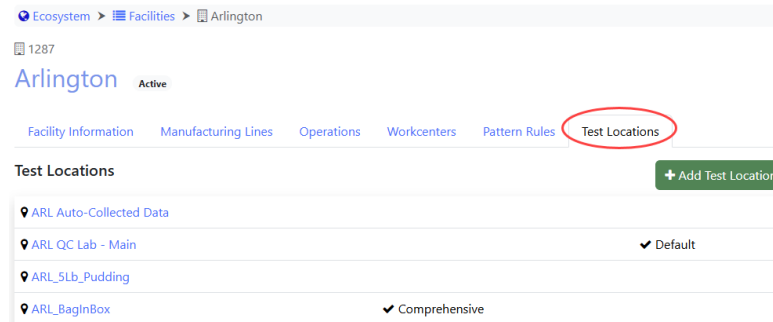
Description	Status
5 Consecutive points increasing or decreasing	<input type="radio"/> On <input checked="" type="radio"/> Off
6 Consecutive points increasing or decreasing	<input type="radio"/> On <input checked="" type="radio"/> Off
7 Consecutive points increasing or decreasing	<input type="radio"/> On <input checked="" type="radio"/> Off
4 out of 5 points beyond 1 standard deviation	<input checked="" type="radio"/> On <input type="radio"/> Off
2 out of 3 points beyond 2 standard deviations	<input checked="" type="radio"/> On <input type="radio"/> Off
1 Point beyond 3 standard deviations	<input checked="" type="radio"/> On <input type="radio"/> Off
8 Consecutive points on one side of the mean	<input type="radio"/> On <input checked="" type="radio"/> Off

NEW Test Locations

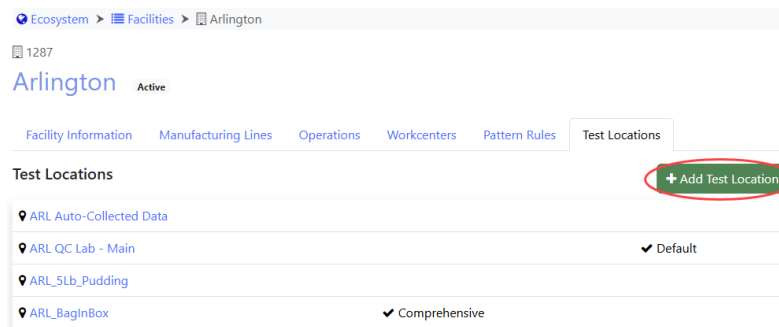
The Test Locations tab enables an administrator to define physical locations within the facility where testing is performed. For example, testing might be performed in a QC laboratory or at specific locations on the manufacturing floor.



54. To view the test locations for the facility, click on the Test Locations tab.



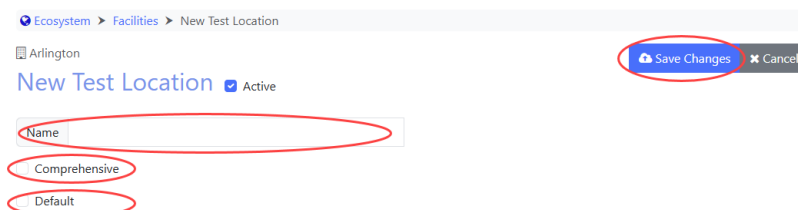
55. To add a new test location, click the 'Add Test Location' button.



- Enter the test location name, check the "Comprehensive" and "Default" checkboxes as appropriate, and click the 'Save Changes' button

Note: If the "**Comprehensive**" checkbox is checked, then when a new sample is created at the applicable location, all rest results must be entered before the user is allowed to close the sample.

Note: If this testing location is the place where most testing is performed (e.g. a QC lab), then check the "**Default**" checkbox. When building quality plans, the test location will default to the "Default" test location which might make building quality plans more efficient.



56. To edit a test location, click the location name.



Ecosystem > Facilities > Arlington

1287

Arlington

Active

Facility Information Manufacturing Lines Operations Workcenters Pattern Rules Test Locations

Test Locations

+ Add Test Location

📍 ARL Auto-Collected Data	
📍 ARL QC Lab - Main	✓ Default
📍 ARL_SLab_Pudding	
📍 ARL_BagInBox	✓ Comprehensive

- a. Click the 'Edit' button.

Ecosystem > Facilities > Arlington > ARL QC Lab - Main

Arlington
Test Location


📍 ARL QC Lab - Main

Active

Name ARL QC Lab - Main

☐ Comprehensive

☒ Default



- b. Edit the location as desired and click the 'Save Changes' button.

Ecosystem > Facilities > Arlington > ARL QC Lab - Main

Arlington
Test Location

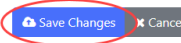

📍 ARL QC Lab - Main

Active

Name

☐ Comprehensive

☒ Default



NEW Chapter 10: Orders

NEW Introduction

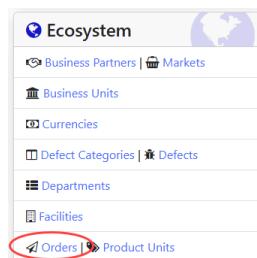
The orders page enables a user to view the orders. This includes manufacturing, receiving, and shipping orders.

Note: Depending on the integration with the ERP system, orders may not be editable in PatrolSuite.

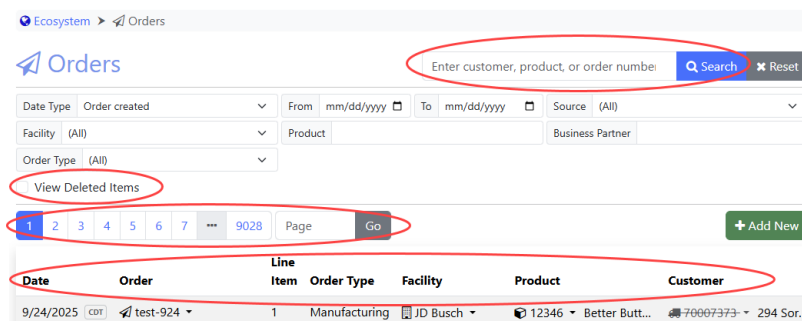
Orders are located on Page: {PatrolSuite URL}/Integration/Orders

View Orders

57. To view the orders, click on the Ecosystem / Orders hyperlink.



- Enter a customer, product, or order number into the search cell to search for an order.
- Check the View Deleted Items checkbox to view deleted orders. Deleted orders appear with red strikethrough text.
- Use the page section to view orders on different pages.
- Click on the column header to change the sort order.





58. To view a filtered list of orders, use the filters as desired.

- a. **Date Type:** Choose what date that will be used by the From/To dates; either the date the order was created, or the date that manufacturing was started or complete.
- b. **Source:** Choose where the order originated.
 - i. All – Displays all orders.
 - ii. External – Displays orders that originated from another business system and appear in PatrolSuite through integration.
 - iii. PatrolSuite – Displays orders that were manually created in PatrolSuite using the 'Add New' button here on this page.
 - iv. Order Conflict – Displays orders that were manually created in PatrolSuite and subsequently were received from an external source via integration, but the facility, product, or customer do not align between the orders.
 - v. Line Item Conflict – Displays order that have conflicting line items in the order.
- c. **Facility:** Displays orders from the chosen facility. Note that depending on facility restrictions, a user may be able to see only orders from his/her facility.
- d. **Product:** Enter a product number (exact) to view orders for a single product.
- e. **Business Partner:** Enter a business partner (customer or supplier) number (exact) to view orders for a single partner.
- f. **Order Type:** Displays orders only from the chosen order type (manufacturing, inbound receiving, or outbound shipping).

The screenshot shows the 'Orders' filter interface in the Ecosystem application. A red oval highlights the filter section, which includes the following elements:

- Date Type:** A dropdown menu currently set to 'Order created'.
- From/To Dates:** Two date input fields labeled 'From' and 'To', both set to 'mm/dd/yyyy'.
- Source:** A dropdown menu currently set to '(All)'.
- Facility:** A dropdown menu currently set to '(All)'.
- Product:** A text input field.
- Business Partner:** A text input field.
- Order Type:** A dropdown menu currently set to '(All)'.
- View Deleted Items:** A checkbox.

Below the filter section, there is a pagination bar showing 'Page 9028' and a 'Go' button. To the right of the pagination bar is a green '+ Add New' button. Below the pagination bar is a table with the following columns: Date, Order, Line Item, Order Type, Facility, Product, and Customer. The first row of the table shows: 9/24/2025, test-924, 1, Manufacturing, JD Busch, 12346, Better Butt..., 70007373, 294 Sor...

NEW Add New Order

NEW Manually adding an order is a two-step process. First, the order number and facility are defined. Then line items are added for the product and business partner.

Note: Orders must be related to a single facility.

NEW Note: PatrolSuite supports orders with multiple line items.

NEW Note: Each line item reflects a single product and business partner. However, orders with multiple line items can contain multiple products and multiple partners. For example, outbound shipping order #22241 going to customer #14678 might have two products on the truck. The order will have two line items to identify each product on the truck.



59. To add a new order, click on the 'New Order' button.

The screenshot shows the 'Orders' page in the Ecosystem application. At the top, there's a search bar with the text 'Enter customer, product, or order number'. Below it are filters for Date Type, Order created, From, To, Source, Facility, Product, and Business Partner. A table of orders is displayed, with the first row showing an order for 'test-924' on 9/24/2025. The 'Add New' button is circled in red.

- Enter the Order Number, Facility, and Order Type. Optionally, provide the Order Information and order Start/End dates and click 'Save Changes'.

Note: Check the Allow Spec Changes checkbox to allow specification changes to the order after the first sample has been created in QualityPatrol. Typically, this is not allowed for commercial product; it's used for experimental product or manufacturing process validation activities.

The screenshot shows the 'New Order' form. The 'Order #' field is filled with '01224'. The 'Facility' is set to 'Arlington' and the 'Order Type' is 'Manufacturing'. The 'Manufacturing Start' and 'Manufacturing End' dates are '10/01/2025' and '10/02/2025' respectively. The 'Allow Spec Changes' checkbox is checked. The 'Save Changes' button is circled in red.

60. To add a line item to the order, click the 'Add New Line Item' button.

The screenshot shows the 'Order 01224' page. The order is active and has a history of changes. The 'Add New Line Item' button is circled in red.

- Click on the Product cell, select the product from the product picker. Enter the remaining information as applicable and click the 'Save Changes' button.

NEW **Note:** While most orders are associated with a business partner, PatrolSuite does not require that a business partner be defined. For example, if your manufacturing orders are integrated with PatrolSuite and your orders are "make-to-stock" because the final customer is not defined at the time of manufacturing, then the integration might not pass a business partner (customer) to PatrolSuite.



- b. To view an audit trail of changes to the line item, click the 'History' button.

- c. To edit the line item, click on the 'Edit' button.

- i. Change the information as desired and click the 'Save Changes' button.

Note: To make a line item active or inactive, click in the 'Active' checkbox and click 'Save Changes'. Checked = Active. Unchecked = Inactive

- d. To delete the line item, click on the 'Delete' button and click the 'Delete' button in the confirmation window.

Note: To view all deleted line items in an order, check the View Deleted Items checkbox.



61. To add an additional line item to the order, 'Add New Line Item' button.

☐ View Deleted Items

+ Add New Line Item

Line Item 1 Active History Edit Delete

Product 703335 ▾ Cheesecake NY Strawberry	Purchase Order Number	Source PatrolSuite
Business Partner	Sales Order Number	Created 10/2/2025 12:58 PM CDT
Partner Product Number	Contract Number	Last edited 10/2/2025 12:58 PM CDT Chris Lloyd

- a. Click on the Product cell, select the product from the product picker. Enter the remaining information as applicable and click the 'Save Changes' button.

Note: PatrolSuite automatically increments the line item number. However, this number can be changed as needed to match the order information.

Line Item * 2 Active Save Line Item Cancel

Product * None

Business Partner None

Partner Product Number

Purchase Order Number

Sales Order Number

Contract Number

Line Item 1 Active History Edit Delete

Product 703335 ▾ Cheesecake NY Strawberry	Purchase Order Number	Source PatrolSuite
Business Partner 70007373 ▾ 294 Soriana Veracruz Floresta	Sales Order Number	Created 10/2/2025 12:58 PM CDT
Partner Product Number	Contract Number	Last edited 10/2/2025 1:08 PM CDT Chris Lloyd

62. To view an audit trail of changes to the order, click the 'History' button.

[Ecosystem](#) > [Orders](#) > 01224

Order

01224 Active History Edit Delete

Order 01224 ▾

Facility Arlington ▾

Order Type

Order Type Information

Additional Information

Manufacturing Start 10/1/2025 12:00 AM CDT

Manufacturing End 10/2/2025 12:00 AM CDT

Source PatrolSuite

Created 10/2/2025 12:18 PM CDT Chris Lloyd

Last edited 10/2/2025 12:18 PM CDT Chris Lloyd

63. To edit the order, click the 'Edit' button.

[Ecosystem](#) > [Orders](#) > 01224

Order

01224 Active History Edit Delete

Order 01224 ▾

Facility Arlington ▾

Order Type

Order Type Information

Additional Information

Manufacturing Start 10/1/2025 12:00 AM CDT

Manufacturing End 10/2/2025 12:00 AM CDT

Source PatrolSuite

Created 10/2/2025 12:18 PM CDT Chris Lloyd

Last edited 10/2/2025 12:18 PM CDT Chris Lloyd

- a. Change the order information as desired and click the 'Save Changes' button.



Ecosystem > Orders > 01224

Order

01224 Active Save Changes Cancel

Order *
01224

Facility *
Arlington

Order Type *
Manufacturing

Manufacturing Start 10/01/2025 12:00 AM

Manufacturing End 10/02/2025 12:00 AM

☐ Allow Spec Changes

64. To delete an order, click on the 'Delete' button, then click on the 'Delete' button in the confirmation window.

Ecosystem > Orders > 01224

Order

01224 Active History Edit Delete

Order 01224

Facility Arlington

Order Type

Order Type Information

Additional Information

Manufacturing Start 10/1/2025 12:00 AM

Manufacturing End 10/2/2025 12:00 AM

Source PatrolSuite

Created 10/2/2025 12:18 PM CDT Chris Lloyd

Last edited 10/2/2025 12:18 PM CDT Chris Lloyd



NEW Chapter 11: Product Units

NEW Introduction

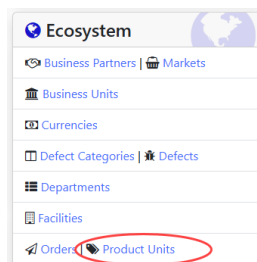
The Units page enables a user to view the product units (incoming raw materials, semi-finished goods, and finished goods). Additionally, this page allows product units to be added in the absence of unit integration with an ERP or MES.

Note: Depending on the integration with the ERP or MES system, Product Units may not be editable in PatrolSuite.

Product Units are located on Page: {PatrolSuite URL}/Integration/Units

View Product Units

65. To view the units, click on the Ecosystem / Product Units hyperlink.



- Enter a unit, order, product, or partner number into the search cell to search for a defect.
- Check the View Deleted Items checkbox to view deleted units. Deleted units appear with red strikethrough text.
- Use the page section to view orders on different pages.
- Click on a column header to change the sort order.



Ecosystem > Product Units

Product Units

Enter unit, order, product, or partner n

Date Type Created From mm/dd/yyyy To mm/dd/yyyy Source Any

Facility Any Product Any Business Partner Any

Workcenter Any

☒ View Deleted Items

1 2 3 4 5 6 7 ... 356589 Page

Unit Number Created	Sequence Position	Order Number Line Item	Facility Workcenter	Product Business Partner
T00001-230217114303 2/17/2023 10:43 AM CST		T00001 1	Niles NIL_Tote_Line	40066 - WHPD SAT IC&... 70007373 - 294 Soriana ...

66. To view a filtered list of units, use the filters as desired.

- Date Type:** Choose what date that will be used by the From/To dates; either the date the order was created, or the date that manufacturing was started or complete.
- Source:** Choose where the order originated.
 - All – Displays all units.
 - External – Displays units that originated from another business system and appear in PatrolSuite through integration.
 - PatrolSuite – Displays units that were manually created in PatrolSuite using the ‘Add New’ button here on this page.
 - Integration Conflict – Displays units that were manually created in PatrolSuite and subsequently were received from an external source via integration, but the order, product, or customer do not align.
- Facility:** Displays units from the chosen facility. Note that depending on facility restrictions, a user may be able to see only units from his/her facility.
- Product:** Enter a product number (exact) to view units for a single product.
- Business Partner:** Enter a business partner (customer or supplier) number (exact) to view units for a single partner.
- Workcenter:** Displays units only from the chosen workcenter.

Add New Product Unit

67. To add a new product unit, click on the ‘Add New’ button.

Ecosystem > Product Units

Product Units

Enter unit, order, product, or partner n

Date Type Created From mm/dd/yyyy To mm/dd/yyyy Source Any

Facility Any Product Any Business Partner Any

Workcenter Any

☒ View Deleted Items

1 2 3 4 5 6 7 ... 356589 Page

- Note:** The line item number refers to the line item on the order, if applicable. A value of zero ("0") means that there are no line items on the associated order.

Ecosystem > Product Units

New Unit ☒ Active

Save Changes

Cancel

Unit *

Order *

Line Item *

0

Sequence

Position

Manufacturing started

mm/dd/yyyy --:-- --

Manufacturing Completed

mm/dd/yyyy --:-- --

Shift

Workcenter

Select a workcenter

68. To edit a unit, click on the desired unit number and select “Produced Unit” from the submenu.

Product Units

Enter unit, order, product, or partner n Search Reset

Date Type Created From mm/dd/yyyy To mm/dd/yyyy Source Any

Facility Any Product Any Business Partner Any

Workcenter Any

☒ View Deleted Items

1 2 3 4 5 6 7 ... 356589 Page Go Add New

Unit Number Created	Sequence Position	Order Number Line Item	Facility Workcenter	Product Business Partner
T00001-230217114303		1	Niles	40066 WHPD SAT IC&...
			NIL_Tote_Line	79007373 294 Soriana ...
		1	Santa Ana	PRDAUDITSAA ...
			SAA_Line_2	0070020450 CH PRO...

- a. If a product unit is sent to PatrolSuite from an external system via integration (Source = External), then the unit will not be editable. However, the unit's history can be seen by clicking on the 'History' button. Note that the history of a "Source = External" unit is dependent on the external system sending changes to the unit to PatrolSuite.



Ecosystem > Product Units > T0001-230217114303

Product Unit

T0001-230217114303 Active History

Order **T00001** Facility **Niles**
 Line Item **1** Product **40066**
 Sequence Business Partner **70007373**
 Position
 Manufacturing started
 Manufacturing Completed
 Shift

Source **External**
 Created 2/17/2023 10:43 AM CST
 Last edited 2/17/2023 10:43 AM CST

- b. If a product unit was manually created in PatrolSuite, then it can be edited in PatrolSuite. To view an audit trail of changes to the product unit, click on the 'History' button.

Ecosystem > Product Units > 2130716

Product Unit

2130716 Active History Edit Delete

Order **2130716** Facility **Hilliard**
 Line Item **1** Product **03213**
 Sequence **2** Business Partner **0070020504**
 Position **3**
 Manufacturing started
 Manufacturing Completed
 Shift
 Workcenter

Source **PatrolSuite**
 Created 9/23/2025 2:42 PM CDT
 Last edited 9/23/2025 2:42 PM CDT

- c. To edit a product unit, click on the 'Edit' button.

Ecosystem > Product Units > 2130716

Product Unit

2130716 Active History Edit Delete

Order **2130716** Facility **Hilliard**
 Line Item **1** Product **03213**
 Sequence **2** Business Partner **0070020504**
 Position **3**
 Manufacturing started
 Manufacturing Completed
 Shift
 Workcenter

Source **PatrolSuite**
 Created 9/23/2025 2:42 PM CDT
 Last edited 9/23/2025 2:42 PM CDT

- i. Edit the unit information as desired and click the 'Save Changes' button.

Note: To make a unit active or inactive, click in the 'Active' checkbox and click 'Save Changes'.
 Checked = Active. Unchecked = Inactive

Ecosystem > Product Units > 2130716

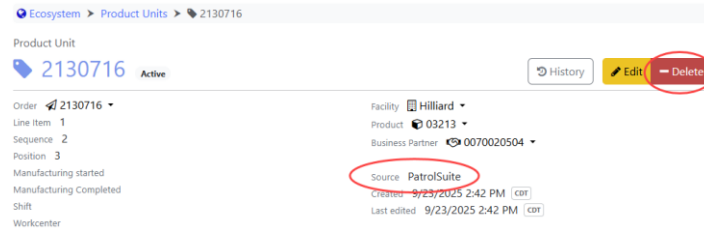
Product Unit

2130716 ☒ Active Save Changes Cancel

Order *
 2130716
 Line Item *
 1
 Sequence
 2
 Position
 3
 Manufacturing started
 mm/dd/yyyy --:-- --
 Manufacturing Completed
 mm/dd/yyyy --:-- --
 Shift
 Workcenter
 Select a workcenter



- d. To delete a product unit, click on the 'Delete' button and then click on the 'Delete' button in the confirmation window.





Chapter 12: Product Groups

NEW Introduction

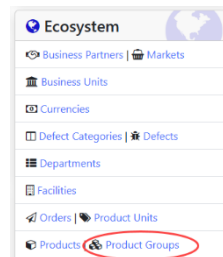
The Product Groups page enables a user to view the product groups in which products (raw materials, semi-finished goods, and finished goods) are organized. Additionally, this page allows a user to quickly view the products that are contained within a product group.

Note: Depending on the integration with the ERP or MES system, Product Groups may not be editable in PatrolSuite.

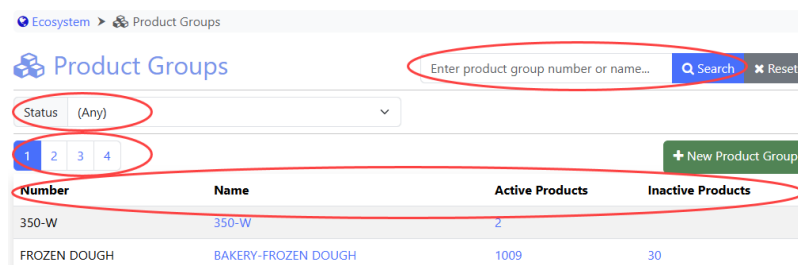
Product Groups are located on Page: {PatrolSuite URL}/Integration/ProductGroups

View Product Groups

69. To view the product groups, click on the Ecosystem / Product Groups hyperlink.



- Enter a product group name or number into the search cell to search for a product group.
- Use the Status filter to view product groups that are active or inactive.
- Use the page section to view orders on different pages.
- Click on a column header to change the sort order.



70. To view the active products in a product group, click on the Active Products hyperlink.



Ecosystem > Product Groups

Product Groups

Enter product group number or name... [Search](#) [Reset](#)

Status (Any)

1 2 3 4 [+ New Product Group](#)

Number	Name	Active Products	Inactive Products
FROZEN DOUGH	BAKERY-FROZEN DOUGH	1009	30
PARBAKE	BAKERY-PARBAKE	57	

71. To view the inactive products in a product group, click on the Inactive Products hyperlink.

Ecosystem > Product Groups

Product Groups

Enter product group number or name... [Search](#) [Reset](#)

Status (Any)

1 2 3 4 [+ New Product Group](#)

Number	Name	Active Products	Inactive Products
FROZEN DOUGH	BAKERY-FROZEN DOUGH	1009	30
PARBAKE	BAKERY-PARBAKE	57	

Add New Product Group

72. To add a new product group, click on the 'New Product Group' button.

Ecosystem > Product Groups

Product Groups

Enter product group number or name... [Search](#) [Reset](#)

Status (Any)

1 2 3 4 [+ New Product Group](#)

Number	Name	Active Products	Inactive Products
350-W	350-W	2	
FROZEN DOUGH	BAKERY-FROZEN DOUGH	1009	30

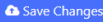

- Enter the group name, code, and description and click the 'Save Changes' button.

Note: The code should align with the product group code sent to PatrolSuite via integration with the ERP.



Ecosystem > Product Groups >

New Product Group Inactive

Name*

Code

Description

Edit Product Group

73. To edit a product group, click on the desired product group name.

Ecosystem > Product Groups

Product Groups

Status (Any)

1 2 3 4 + New Product Group

Number	Name	Active Products	Inactive Products
FROZEN DOUGH	<u>BAKERY-FROZEN DOUGH</u>	1009	30
PARBAKE	BAKERY-PARBAKE	57	

- a. To localize the name of the product group, click on the localization icon, click on the 'Edit' button, enter the localized text, and click 'Save Changes'.

Ecosystem > Product Groups > BAKERY-FROZEN DOUGH

BAKERY-FROZEN DOUGH Active

Description

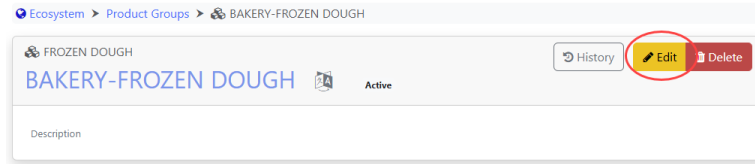
- b. To view the audit trail of changes to the product group, click on the 'History' button.

Ecosystem > Product Groups > BAKERY-FROZEN DOUGH

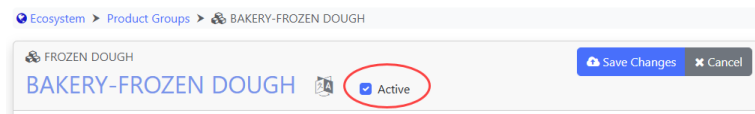
BAKERY-FROZEN DOUGH Active

Description

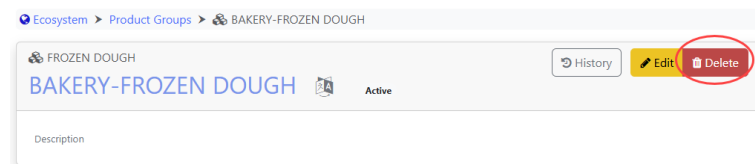
- c. To edit the product group, click on the 'Edit' button, change the text as desired, and click the 'Save Changes' button.



- i. To make a product group active or inactive, click in the 'Active' checkbox and click 'Save Changes'. Checked = Active. Unchecked = Inactive.



- d. To delete a product group, click on the 'Delete' button, then click on the 'Delete' button in the confirmation window.





Chapter 13: Products

NEW Introduction

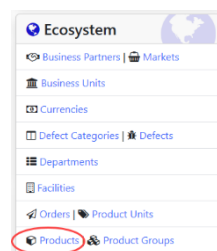
The Products page displays the global list of products (incoming raw materials, semi-finished goods, and finished goods). Products are typically defined and managed in the ERP system and sent to PatrolSuite via integration. However, products can also be defined and managed in PatrolSuite. Additionally, this page facilitates the management of Test Groups.

Note: Depending on the integration with the ERP or MES system, Products may not be editable in PatrolSuite.

Products are located on Page: {PatrolSuite URL}/Integration/Products

View Products

74. To view the products, click on the Ecosystem / Products hyperlink.



- Enter a product number or name into the search cell to search for a product.
- Check the View Deleted Items checkbox to view deleted products. Deleted products appear with red strikethrough text.
- Use the page section to view products on different pages.
- Click on a column header to change the sort order.



The screenshot shows the 'Products' page in the Ecosystem interface. At the top, there is a search bar with the placeholder text 'Enter product number or name...' and buttons for 'Search' and 'Reset'. Below the search bar are four filter dropdowns: 'Product Group (Any)', 'Product Type (Any)', 'Type (Any)', and 'Status (Any)'. A link 'View Deleted Items' is also present. Below the filters is a pagination bar with page numbers 1 through 7, an ellipsis, and '303', followed by a 'Page' label and a 'Go' button. A '+ New' button is located on the right side of the pagination bar. Below the pagination bar is a table with the following data:

Number	Name	Product Group	Test Group
12346	Better Butter Crème Deluxe	TCCS-BETTERCREME	
703335	Cheesecake NY Strawberry	DESSERTS-CHEESECAKES	

75. To view a filtered list of products, use the filters as desired.

Product Group: Choose the desired product group.

Product Type: Choose the product type code. This code is typically defined in the ERP and sent to PatrolSuite via integration.

Type: Choose to see products or test groups.

Status: Choose to see active or inactive products.

Add New Product

76. To add a new product, click on the 'New' button then select 'Product' in the submenu.

This screenshot is identical to the one above, but with a red circle highlighting the '+ New' button in the top right corner of the pagination area. Another red circle highlights the 'Product' option in the dropdown menu that appears when the '+ New' button is clicked.

- Enter the product number and name and choose the Product Group to the product belongs. Enter the remaining information as appropriate and click the 'Save Changes' button.

Note: Associating a product with a **Product Group** is not required but is highly recommended.

Note: If an **External Name** is defined, it will replace the standard name on all certificates of analysis.

Note: Click on the Help icon in the user interface for an explanation of **Allow Automatic Approval**.

Note: **Product Type** is typically a code that is assigned in the ERP to categorize the product.

Note: Enter a numerical value for **Shelf Life**.

Note: The **Shelf Life Unit of Measure** corresponds to the shelf life value entered.

Note: Select the **Unit of Measure** that corresponds to how the product is quantified when nonconforming product is produced.

Note: Select the **Currency** that is used measure the cost of poor quality when nonconforming product



is produced. This currency is often dictated by the country of the manufacturing facility that produces the product.

Ecosystem > Products > New Product

New Product ☒ Active

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

Number *

Product Group
(Choose a Product Group ...)

Name *

External Name ?

Description

☐ Allow Automatic Approval

Product Type

Shelf Life

Shelf Life Unit of Measure
Select...

Unit of Measure
Select

Currency
Select

Edit Product

77. Use the filters or search features on the product page to locate the desired product. Click on the product name hyperlink.

Ecosystem > Products

Products

7754 [Search](#) [Reset](#)

Product Group (Any) Product Type (Any)

Type (Any) Status (Any)

☐ View Deleted Items

[+ New](#)

Number	Name	Product Group	Test Group
X-7754	Surfactant Denso 7754	X-RAW MATERIAL	

a. To view an audit trail of changes to the product, click on the 'History' button.

Ecosystem > Products > Surfactant Denso 7754

Product X-7754

Surfactant Denso 7754 Active

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

Number X-7754

☒ Allow Automatic Approval

b. To edit a product, click on the 'Edit' button.

Ecosystem > Products > Surfactant Denso 7754

Product X-7754

Surfactant Denso 7754 Active

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

Number X-7754

☒ Allow Automatic Approval

i. Edit the product information as desired and click the 'Save Changes' button.



Note: To make a product active or inactive, click in the 'Active' checkbox and click 'Save Changes'. Checked = Active. Unchecked = Inactive

- c. To delete a product, click on the 'Delete' button and then click on the 'Delete' button in the confirmation window.

- d. To edit the product costs, click the 'Edit' button.

Note: This feature may or may not be visible depending on whether the QualityPatrol nonconforming product module is in use.

	Manufacturing Cost	Scrap Cost	Salvage Value	Unit of Measure
Individual				
Packaged				

- i. Edit the product cost information as desired and click the 'Save Changes' button.

Note: Select the **Currency** that is used measure the cost of poor quality when nonconforming product is produced. This currency is often dictated by the country of the manufacturing facility that produces the product.

Note: The costs for the **Individual** unit reflects the product in its smallest quantity. For example, a liquid product may be filled into a quart container and then 12 quarts may be packaged together in one case. The individual unit is 1 quart.

Note: The costs for the **Packaged** unit reflects the product in its packaged quantity. For example, a liquid product may be filled into a quart container and then 12 quarts may be packaged together in one case. The packaged unit is 1 case.

Note: The **Manufacturing Cost** reflects the cost to manufacture 1 individual unit or 1 packaged unit of the product. This cost typically includes raw materials, overhead, conversion, and labor costs. Check with your costs accounts to determine how your organization quantifies manufacturing costs.



Note: When nonconforming product cannot be reworked or downgraded and sold as a different product, it must be disposed. The **Scrap Cost** typically reflects only the cost to dispose of the nonconforming units and does not include the manufacturing costs. Check with your cost accounts to determine how your organization quantifies scrap costs.

Note: When nonconforming product can be reworked, the **Salvage Cost** reflects only the cost to rework the nonconforming units and does not include the manufacturing costs. Check with your cost accounts to determine how your organization quantifies salvage costs.

	Manufacturing Cost	Scrap Cost	Salvage Value	Unit of Measure
Individual	USD	USD	USD	Select
Packaged	USD	USD	USD	Select

- e. To view all customer who purchase this product, see the Customers card.

Note: This feature requires integration with the business system that contains shipping orders by product/customer. If this information is currently not sent to PatrolSuite, contact MAP to request a quote. Typically, the integration is with an ERP or MES that contains “Outbound Shipping Orders” and/or “Inbound Receiving Orders” by product/customer. If your business systems do not provide Outbound Shipping or Inbound Receiving Orders by product/customer, then it may be possible to obtain this information from the Manufacturing Orders provided your manufacturing orders identify a real customer (i.e. the manufacturing orders are not make-to-stock).

Customers			
Customer	Orders	First Order/Date	Latest Order/Date
0070020504 ▾ ACME Corporation	57	1910277 ▾ 8/10/2017 CST	01224 ▾ 10/1/2025 CDT



Chapter 14: Product Test Groups

NEW Introduction

A Test Group is a group of products that have the same inspection and testing requirements. Organizing products into test groups can simplify quality plan management.

Quality Plan Management Use Case

A manufacturer produces a liquid finished good that can be packaged into 24 different sized containers. Accordingly, there are 24 different SKUs. The liquid requires 10 total tests. Nine tests are product tests, and one test is the weight of the container when filled with the liquid. The quality admin has two options for creating and managing quality plans:

1. Create 24 quality plans (one for each SKU). Each plan contains all 10 tests.

Management of change: When one of the nine product tests for the liquid requires a change (or when a new test needs to be added), then the quality admin must edit all 24 quality plans.

2. Create a test group and place the 24 products into the test group.
 - a. Create 1 quality plan for the test group which contains the nine common product tests.
 - b. Create 24 quality plans (one for each SKU). Each plan contains only one test – the filled container weight.

Management of change: When one of the nine product tests for the liquid requires a change (or when a new test needs to be added), then the quality admin must edit only one quality plan – the product test group plan.

Specifications

Specifications can be defined and managed for a test group in the same manner as a regular SKU. Accordingly, test methods in the test group can have specifications defined at the test method, product, and customer levels.

Sample Initiation

When a sample is initiated in QualityPatrol for a given SKU, the logic combines the testing requirements of the SKU quality plan and, if the SKU is part of a test group, the test group test plan.

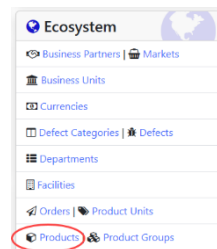


View Test Groups

Product Test Groups are managed on product page. Page: {PatrolSuite URL}/Integration/Products?IsTestGroup=True

Note: Depending on the integration with the ERP or MES system, Product Test Groups may not be editable in PatrolSuite.

78. To view the product test groups, click on the Ecosystem / Products hyperlink.



79. Select “Test Groups” in the Type filter.

- Enter a product number or name into the search cell to search for a test group.
- Check the View Deleted Items checkbox to view deleted test groups. Deleted test groups appear with red strikethrough text.
- Use the page section to view test groups on different pages.
- Click on a column header to change the sort order.

Number	Name	Product Group	Test Group
TG-00001	TG-Cheesecakes	DESSERTS-CHEESECAKES	
TG-00002	TG-Frozen Dough	BAKERY-FROZEN DOUGH	

80. To view a filtered list of test groups, use the filters as desired.

- Product Group:** Choose the desired product group.
- Product Type:** Choose the test group code. This code is typically defined in the ERP and sent to PatrolSuite via integration.
- Type:** Choose “Test Group” to see only test groups.
- Status:** Choose to see active or inactive test groups.



Ecosystem > Products

Products

Enter product number or name... Search Reset

Product Group (Any) Product Type (Any)

Type Test Groups Status (Any)

☐ View Deleted Items

Create New Test Group

81. To create a new test group, click on the 'New' button then select 'Test Group' in the submenu.

Ecosystem > Products

Products

Enter product number or name... Search Reset

Product Group (Any) Product Type (Any)

Type Test Groups Status (Any)

☐ View Deleted Items

+ New

Number	Name	Product Group	
TG-00001	TG-Cheesecakes	DESSERTS-CHEESECAKES	1 Product Test Group

- Enter the test group number and name and choose the Product Group to which the test group belongs. Enter the remaining information as appropriate and click the 'Save Changes' button.

Note: Associating a test group with a **Product Group** is not required but is highly recommended. Consider creating product groups that are for a specific test group. This will distinguish them from standard product groups.

Note: If an **External Name** is defined, it will replace the standard name on all certificates of analysis. This value is typically left null in a test group because it is defined in the product UI.

Note: **Allow Automatic Approval** does not apply to test groups. Therefore, this feature is not included on this user interface.

Note: **Product Type** is typically a code that is assigned in the ERP to categorize the test group. This value is typically left null in a test group because it is defined in the product UI.

Note: Enter a numerical value for **Shelf Life**. This value is typically left null in a test group because it is defined in the product UI.

Note: The **Shelf Life Unit of Measure** corresponds to the shelf life value entered. This value is typically left null in a test group because it is defined in the product UI.

Note: Select the **Unit of Measure** that corresponds to how the test group is quantified when nonconforming product is produced. This value is typically left null in a test group because it is defined in the product UI.

Note: Select the **Currency** that is used measure the cost of poor quality when nonconforming product is produced. This currency is often dictated by the country of the manufacturing facility that produces the product. This value is typically left null in a test group because it is defined in the product UI.



Ecosystem > Products > New Test Group

New Test Group Active

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

Number *

Product Group
(Choose a Product Group ...)

Name *

External Name

Description

Product Type

Shelf Life

Shelf Life Unit of Measure
Select...

Unit of Measure
Select

EDI Currency
Select

Edit Test Group

82. On the Products page, select “Test Groups” in the Type filter.

Ecosystem > Products

Products

Enter product number or name... [Search](#) [Reset](#)

Product Group (Any)

Type **Test Groups**

Status (Any)

☐ View Deleted Items

83. Use the filters or search features to locate the desired test group. Click on the test group name hyperlink.

Ecosystem > Products

Products

Enter product number or name... [Search](#) [Reset](#)

Product Group (Any)

Type **Test Groups**

Status (Any)

☐ View Deleted Items

[+ New](#)

Number	Name	Product Group	Test Group
TG-00001	TG-Cheesecakes	DESSERTS-CHEESECAKES	

a. To view an audit trail of changes to the test group, click on the ‘History’ button.

Ecosystem > Products > TG-Cheesecakes

Test Group TG-00001

TG-Cheesecakes Active

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

Number TG-00001

Product Group DESSERTS-CHEESECAKES

Product Type FG

Test Group

b. To edit a test group, click on the ‘Edit’ button.



Ecosystem > Products > TG-Cheesecakes

Test Group TG-00001

TG-Cheesecakes Active

History Edit Delete

Number TG-00001 Product Type FG

Product Group DESSERTS-CHEESECAKES Test Group

- i. Edit the test group information as desired and click the 'Save Changes' button.

Note: To make a test group active or inactive, click in the 'Active' checkbox and click 'Save Changes'. Checked = Active. Unchecked = Inactive

Ecosystem > Products > TG-Cheesecakes

Test Group TG-00001

TG-Cheesecakes ☒ Active Save Changes Cancel

Number * TG-00001 Product type FG

Product Group DESSERTS-CHEESECAKES Shelf Life 30

Name * TG-Cheesecakes Shelf Life Unit of Measure days

External Name ? Unit of Measure Select

Description Currency United States Dollar (USD \$)

- c. To delete a test group, click on the 'Delete' button and then click on the 'Delete' button in the confirmation window.

Ecosystem > Products > TG-Cheesecakes

Test Group TG-00001

TG-Cheesecakes Active History Edit Delete

Number TG-00001 Product Type FG

Product Group DESSERTS-CHEESECAKES Test Group

View Products in a Test Group

84. On the Products page, click on the test group name hyperlink.

Ecosystem > Products

Products Enter product number or name... Search Reset

Product Group (Any) Product Type (Any)

Type Test Groups Status (Any)

☐ View Deleted Items

+ New

Number	Name	Product Group	Test Group
TG-00001	TG-Cheesecakes	DESSERTS-CHEESECAKES	

85. The products that are part of the test group are displayed in the products card.



Products

Product Number [+ Add Product](#)

Number	Name	
04810	HOC CHP CDO #240/1Z	- Remove
0700124	0700124 WIP 40 OZ. CARAMEL TURTLE BNY WI	- Remove

Add a Product to a Test Group

86. Enter the exact product number into the Product Number cell and click the 'Add Product' button.

Products

Product Number [+ Add Product](#)

Number	Name	
04810	HOC CHP CDO #240/1Z	- Remove
0700124	0700124 WIP 40 OZ. CARAMEL TURTLE BNY WI	- Remove

Remove a Product from a Test Group

87. Click on the 'Remove' button and click on the 'Remove' button in the confirmation window.

Products

Product Number [+ Add Product](#)

Number	Name	
04810	HOC CHP CDO #240/1Z	- Remove
0700124	0700124 WIP 40 OZ. CARAMEL TURTLE BNY WI	- Remove

Edit a Product in a Test Group

88. Click on the desired products name hyperlink. Edit the product information as outlined in the previous chapter of this user guide.

Products

Product Number [+ Add Product](#)

Number	Name	
04810	HOC CHP CDO #240/1Z	- Remove
0700124	0700124 WIP 40 OZ. CARAMEL TURTLE BNY WI	- Remove



Chapter 15: Units of Measure

NEW Introduction

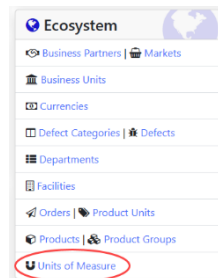
The Units of Measure page enables the definition and management of the global list of units of measure that apply to numerical values throughout PatrolSuite (e.g. test results, product quantities, product shelf life, manufacturing quantities, shipping quantities, etc.).

Note: Depending on the integration with the ERP or MES system, Units of Measure may not be editable in PatrolSuite.

Units of Measure are located on Page: {PatrolSuite URL}/Integration/UnitsOfMeasure

View Units of Measure

89. To view the units of measure, click on the Ecosystem / Units of Measure hyperlink.



- Enter a unit of measure name or code into the search cell to search for a unit of measure.
- Use the Status filter to view units of measure that are active or inactive.
- Check the View Deleted Items checkbox to view deleted units of measure. Units of measure that have been deleted appear with red strikethrough text.
- Use the page section to view units of measure on different pages.
- Click on a column header to change the sort order.



Ecosystem > Units of Measure

Units of Measure

Enter unit name or code... Search Reset

Status: (Any) View Deleted Items

1 2 3 + New Unit Of Measure

Name	Code
Angular Degree	°
Bags	Bg

Add New Unit of Measure

90. To add a new unit of measure, click on the 'New Unit of Measure' button.

Ecosystem > Units of Measure

Units of Measure

Enter unit name or code... Search Reset

Status: (Any) View Deleted Items

1 2 3 + New Unit Of Measure

Name	Code
Angular Degree	°
Bags	Bg

- Enter the unit of measure name, code, and description and click the 'Save Changes' button.

Note: The code should align with the units of measure code used in the ERP or MES.

New Unit Of Measure Active Save Changes Cancel

Name*

Code*

Description

Edit Unit of Measure

91. To edit a unit of measure, click on the desired unit of measure name.



Ecosystem > Units of Measure

Units of Measure

Enter unit name or code... Search Reset

Status: (Any) View Deleted Items

1 2 3 + New Unit Of Measure

Name	Code
Angular Degree	*
Bags	Bg

- a. To localize the unit of measure name, click on the localization icon, click on the 'Edit' button, enter the localized language text, and click 'Save Changes'.

Ecosystem > Units of Measure > Angular Degree

Angular Degree Localization Icon Active History Edit Delete

Description

- b. To view the audit trail of changes to the unit of measure, click on the 'History' button.

Ecosystem > Units of Measure > Angular Degree

Angular Degree Localization Icon Active History Edit Delete

Description

- c. To edit the unit of measure, click on the 'Edit' button, change the text as desired, and click 'Save Changes'.

Ecosystem > Units of Measure > Angular Degree

Angular Degree Localization Icon Active History Edit Delete

Description

- i. To make a unit of measure active or inactive, click in the 'Active' checkbox and click 'Save Changes'. Checked = Active. Unchecked = Inactive.

Ecosystem > Units of Measure > Angular Degree

Angular Degree Localization Icon ☒ Active Save Changes Cancel

Name: Angular Degree

Code: *

- d. To delete a unit of measure, click on the 'Delete' button, then click on the 'Delete' button in the confirmation window.

