

# Metrics & Reports User Guide Version 2025-10



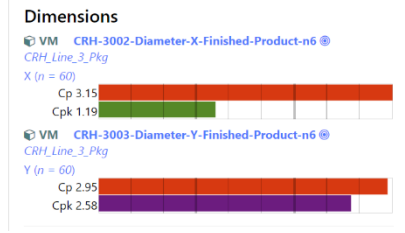
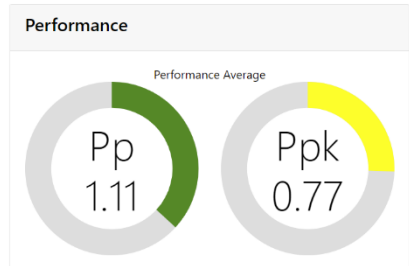
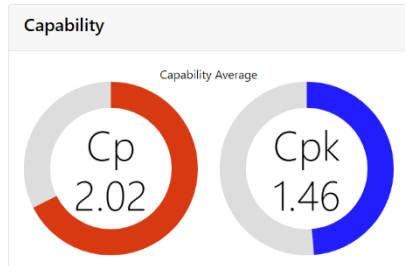
## Order Capability & Performance

21251 Get Order View: All  
 Operation: All  
 View Manufacturing History  
 Product Capability  
 Operations  
 CRH-Line-3-Mixer  
 CRH-Line-3-Pkg  
 CRH-Line-3-Proof-Cutter  
 CRH-Line-3-Sheeting-Table

### Metrics & Reports

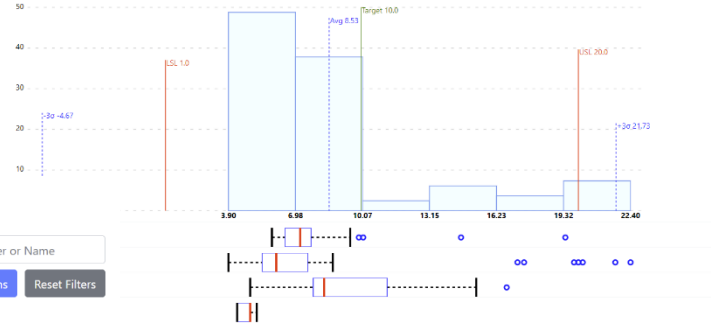
- Manufacturing Orders
- Manufacturing Order Results
- Genealogy by Order
- Genealogy by Unit
- Capability & Performance
  - By Order
  - By Product
  - Quality Plan Subscriptions
  - Configure
- Testing Standards
- Preventive Controls

Manufacturing Order: 21251 | Production Date: 2019-04-12 | Facility: CrestHill | 17020 FNR SIGN 7\*  
 Capability & Performance Colors: Great Good Acceptable Poor Bad Very Bad



### Dimensions

	N	+1σ	+2σ	+3σ	Upper Spec Limit	Upper Warning Limit	Target	Cp	Pp
CRH-3002-Diameter-X-Finished-Product-n6	29	12.93	17.33	21.73	20.0	None	10.0	1.91	0.72
CRH-3003-Diameter-Y-Finished-Product-n6		-1.0	-2.0	-3.0	Lower Spec Limit	Lower Warning Limit	8.53	1.52	0.57



## Test Plan Subscriptions

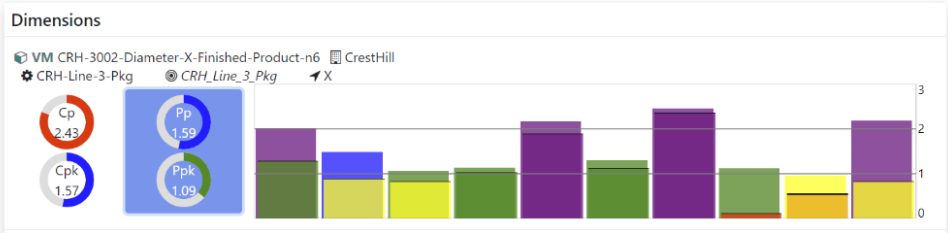
Product Family: (All) | Product: Number or Name | Customer: Number or Name  
 My Subscriptions View Test Plans Reset Filters

Product	Customer	Operation
760 R CHOCOLATE Cake Round Layer		
760 R CHOCOLATE Cake Round Layer		
760 R VANILLA Cake Round Layer		
761 R CHOCOLATE WS Cake Round Layer		
761 R CHOCOLATE WS Cake Round Layer		
761 R CHOCOLATE WS Cake Round Layer		
818245 Cust Creme Boston		
818246 Cust Creme Boston Dix		

## Product Capability & Performance



170 Get Product View: All  
 Facility: All  
 Max Orders: 10

Product Family: PIZZA | Product: 17020 FNR SIGN 7\*  
 Capability & Performance Colors: Great Good Acceptable Poor Bad Very Bad  
 Data: Insufficient \*\*\*\* No Data





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# Chapter 1: Introduction

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## Introduction

The Metrics & Reports card contains links to manufacturing order information, the Capability & Performance module, and the Testing Standards Report. The Capability & Performance module is a web-based app that enables users to subscribe to products of interest. Every time a product of interest is manufactured, the user receives a notification. The notification contains a hyperlink to a multi-layered series of metrics (graphical representations of data) and statistical analyses to provide the subscriber with insight as to how well the manufacturing order met manufacturing and product quality criteria, and how the order compared to previous orders of the same product. An advanced understanding of statistics is not required to interpret the metrics, but a basic understanding of the capability and performance indices (Cp/Cpk and Pp/Ppk) is recommended. This module is a read-only activity, so users cannot edit or change the native quality data.

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## Access

Contact your IT department for URL and login credential information to access the PatrolSuite homepage.

 Access to PatrolSuite modules is managed by a combination of PatrolSuite and Active Directory security. Accordingly, **not all users will see the same PatrolSuite homepage contents, and not all users will have read-write or edit capability for all modules.** Contact your IT department with questions regarding security and permissions.

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## Browser

All PatrolSuite™ modules are accessed via a browser. PatrolSuite, and all its apps such as Metrics & Reports, are certified to the following browsers: Google Chrome, Microsoft Edge, or Safari. MAP strongly recommends using only these browsers. Contact your IT department to obtain the URL to access the PatrolSuite homepage from where the Ecosystem app can be accessed.

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## Definitions

**Business Partner** – Customers and Suppliers.

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

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

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

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

**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.

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

**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.

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**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

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

**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.





**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.



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## Symbol Key

The following symbols may be 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.



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# Chapter 2: Definitions

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## Capability & Performance Definitions

**Cp – Process Capability.** Numerical indicator of the ability of a process to produce product within specifications (e.g. USL and LSL). Cp answers the question, “Is the process *capable* of making product that meets specification?”

- a. Use: Existing process under statistical control. Cp is a predictive analysis used to predict what the process is capable of doing in the near future (short term) assuming the process remains in a state of statistical control.
- b. Calculation: Cp is calculated as the ratio of the specification spread (the voice of the customer) divided by the 6-sigma spread of the process (the voice of the process).
- c. Standard Deviation: Cp uses sampling to calculate an estimated standard deviation of the sample ( $R\bar{Bar}/d2$ ).
- d. Centering: Cp does not take into account whether the process is centered between the specifications.
- e. Interpretation: Higher Cp values indicate a process that is more capable.
- f. Comparison: Cp values are typically more liberal (larger) than the more conservative (smaller) Pp values.
- g. Prerequisites: The Cp index is meaningless if the process is not in control.

**Cpk – Process Capability index** that takes into account where the process is centered. Numerical indicator of the ability of a process to produce product within specifications. Cpk answers the question, “Is the process likely to make product that meets specification?” Accordingly, this index is sometimes named the “Process Acceptability” index.

- a. Use: Existing process under statistical control. Cpk is a predictive analysis used to predict what the process is capable of doing in the near future (short term) assuming the process remains in a state of statistical control.
- b. Calculation: The Cpk index uses the Cp index as a starting point, but then applies a penalty if the process is not centered between the specifications.
- c. Standard Deviation: Cpk uses sampling to calculate an estimated standard deviation of the sample ( $R\bar{Bar}/d2$ ).
- d. Centering: Cpk takes centering into account. Accordingly, Cpk can be used to determine if a process is *acceptable*.
- e. Interpretation: Higher Cpk values indicate a process that is more capable. If the Cp value is equal to the Cpk value, then the process is perfectly centered. The Cpk value can be negative, which means

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that the process average is outside of specifications.

- f. Comparison: Cpk values are typically more liberal (larger) than the more conservative (smaller) Ppk values.
- g. Prerequisites: The Cpk index is based on the assumption that the data is normally distributed, and is meaningless if the process is not in control.
- h. One-sided Specs: If a test method has one-sided specs (i.e. only an upper or only a lower spec), then PatrolSuite will calculate and display Cpk reflective of the Cpu (Cp upper) or Cpl (Cp lower).

**Pp – Process Performance.** Numerical indicator of how a process performed in the past relative to specifications.

- h. Use: New processes or existing processes that are not yet under statistical control. Pp is a historical analysis to determine how the process actually performed. Pp should not be used to predict future process capability.
- i. Calculation: Pp is calculated as the ratio of the specification spread (the voice of the customer) divided by the 6-sigma spread of the process (the voice of the process).
- j. Standard Deviation: Pp calculates the standard deviation using all the data in the sample.
- k. Centering: Pp does not take into account whether the process is centered between the specifications.
- l. Interpretation: Higher Pp values indicate a process that performed better.

**Ppk - Process Performance Index.** Numerical indicator of how a process performed in the past, relative to specifications, that takes into account where the process is centered.

- m. Use: New processes or existing processes that are not yet under statistical control. Ppk is a historical analysis to determine how the process actually performed. Ppk should not be used to predict future process capability.
- n. Calculation: The Ppk index uses the Pp index as a starting point, but then applies a penalty if the process is not perfectly centered between the specifications.
- o. Standard Deviation: Pp calculates the standard deviation using all the data in the sample.
- p. Centering: Ppk takes centering into account. Accordingly, Ppk can be used to determine if the process performance was acceptable.
- q. Interpretation: Higher Ppk values indicate a process that performed better. If the Pp value is equal to the Ppk value, then the process is perfectly centered. The Ppk value can be negative, which means that the process average is outside of specifications.
- r. One-sided Specs: If a test method has one-sided specs (i.e. only an upper or only a lower spec), then PatrolSuite will calculate and display Ppk reflective of the Ppu (Pp upper) or Ppl (Pp lower).

**Statistical Control** – As noted above, Cpk and Ppk have no meaning if the process is not in statistical control. However, one can (and should) use the capability and performance indexes as an indicator of whether the process is in statistical control:

- s. If Cpk is approximately equal to Ppk, then the process is in control.
- t. If Cpk is not approximately equal to Ppk, then the process is not in control, and Cpk and Ppk should not be used to assess past performance and to predict future capability.



# Chapter 3: Security

## Introduction

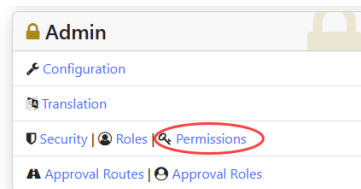
PatrolSuite security is integrated with Microsoft Active Directory. Each PatrolSuite Role must be associated with an Active Directory group.



## Permissions

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

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



2. Scroll down to the Metrics & Reports section. There are two permissions that apply to Metrics & Reports. Read the description to learn what each permission enables.

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

Metrics and Reports		
<a href="#">Edit Capability Settings</a>	Allows users to view the Metrics and Reports/Capability and Performance/Configure hyperlink on the PatrolSuite homepage and to edit capability and performance report settings. These settings are global and affect all facilities.	Quality.CapabilitySetup
<a href="#">View</a>	Allows users to view all Metrics & Reports pages.	Reports.View

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

## Roles

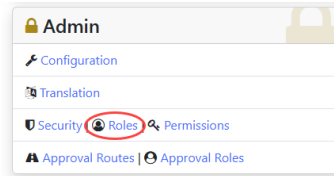
To grant a user a permission, the user must be placed into a Role that has the permission activated. Roles are user defined.

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

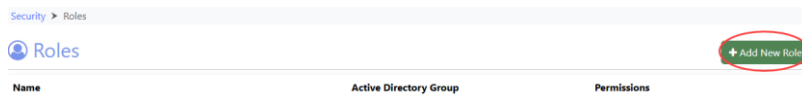
- To access the PatrolSuite Roles, click on the Roles hyperlink in the Admin card on the PatrolSuite homepage.



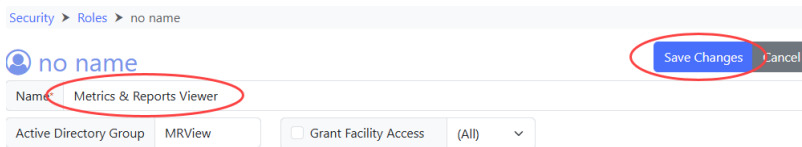
**Note:** MAP recommends creating the following Metrics & Reports Roles:

- Metrics & Reports Admin**
- Metrics & Reports Viewer**

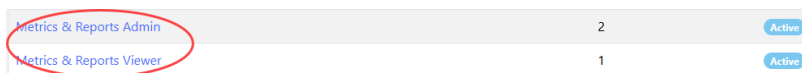
- To create a Role, click on the 'Add New Role' button.



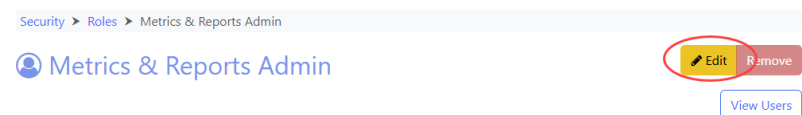
- Enter the name of the role and click 'Save Changes'.



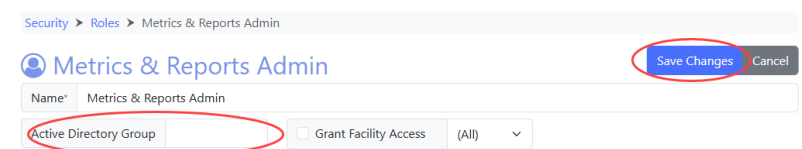
- Contact your IT department and request creating an Active Directory group for each PatrolSuite Role. The Active Directory group names are typically the same as the PatrolSuite Role name.
  - Provide the IT department with the names of all users who need to be added into each Active Directory group.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



- Click on the 'Edit' button.



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



**Note:** Granting facility access is typically not done for an Metrics & Reports Role. Accordingly, MAP

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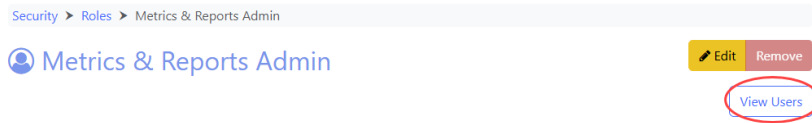
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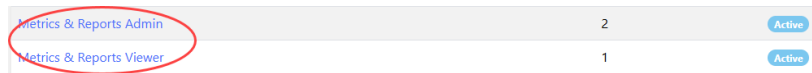
recommends leaving the Grant Facility Access checkbox unchecked.

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



- To grant permissions to a PatrolSuite Role:

- Click on the desired Role name.



- Scroll down to the Metrics & Reports 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 **Metrics & Reports Admin** Role typically includes the following permissions:

Metrics and Reports		
<input checked="" type="checkbox"/>	Edit Capability Settings	Allows users to view the Metrics and Reports/Capability and Performance/Configure hyperlink on the PatrolSuite homepage and to edit capability and performance report settings. These settings are global and affect all facilities.
<input type="checkbox"/>	View	Allows users to view all Metrics & Reports pages.


The **Metrics & Reports Viewer** Role typically includes the following permissions:

Metrics and Reports		
<input type="checkbox"/>	Edit Capability Settings	Allows users to view the Metrics and Reports/Capability and Performance/Configure hyperlink on the PatrolSuite homepage and to edit capability and performance report settings. These settings are global and affect all facilities.
<input checked="" type="checkbox"/>	View	Allows users to view all Metrics & Reports pages.



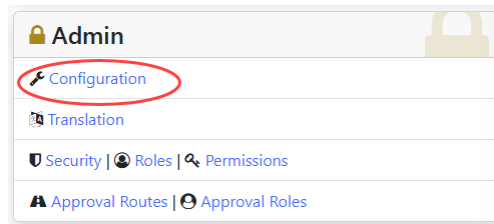
# Chapter 4: Configuration

## Minimum Samples

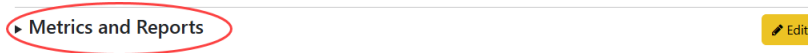
 A user with the Configuration/Edit Capability Settings permission as shown above and the Configuration/Manage permissions as shown below will be able to define and edit the minimum number of samples required to calculate capability and performance indices.

Configuration		
<a href="#">Deploy</a>	Allows users to deploy PatrolSuite software updates.	Configuration.Deploy
<a href="#">Manage</a>	Allows users to view the Admin/Configuration hyperlink on the PatrolSuite homepage and to edit PatrolSuite configuration settings.	Configuration.Modify
<a href="#">View</a>	Allows users to view the Admin/Configuration hyperlink on the PatrolSuite homepage and to view PatrolSuite configuration settings.	Configuration.View

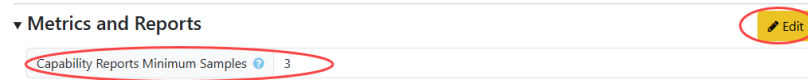
11. To define and edit the minimum number of samples required to calculate capability and performance indices, click on the “Configuration” hyperlink on the Admin card on the PatrolSuite homepage.



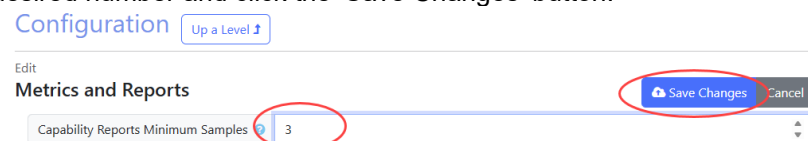
12. Click on Metrics and Reports to view its contents.



13. To change the minimum number of samples required to calculate capability and performance indices, click on the ‘Edit’ button,



a. Enter the desired number and click the ‘Save Changes’ button.





# Chapter 5: Manufacturing Order

## Results

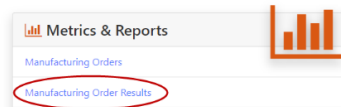
### Introduction

For a given manufacturing order, the Manufacturing Order Results page enables a user to:

- I. **Review summarized data** regarding the test results, including the capability and performance for each test method.
- II. Identify test methods with **specification excursions**. This is helpful for troubleshooting customer complaints, making quality state decisions, and supporting continuous improvement projects.
- III. Evaluate quality **performance by shift** (requires integration to acquire the “Shift ID” from the ERP or MES).
- IV. Access the corresponding **SPC page** containing the control chart and histogram.

### View & Search Order Results

14. Click on the Manufacturing Order Details link on the PatrolSuite homepage.

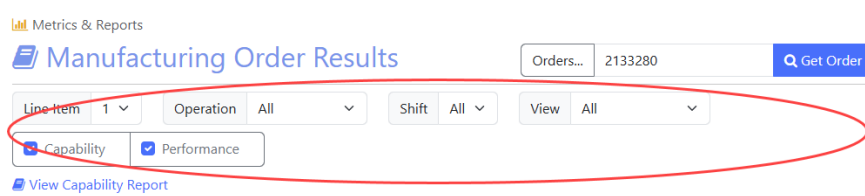


15. Type the desired manufacturing order number into the Manufacturing Order cell and click the ‘Get Order’ button. The test results data will be returned.



**Note:** The order results page displays *all* variable test methods in the applicable test plan (not just the CTQ and Overview test methods).

16. Use the filters to view the desired test results for the order.



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- a. Line Item – If the manufacturing has more than one line item, select the desired line item. If the order has only one line item (which is typical), then line item #1 will be selected by default.
  - b. Operation – If the manufacturing spans more than one operation, select the desired operation.
  - c. Shift – Select the desired shift to view results from only that shift.
  - d. View – Select the desired test methods.
    - i. All data.
    - ii. Only test methods marked as “overview.”
    - iii. Only test methods that contain excursions (results that exceed specification limits).
  - e. Click on the Capability and Performance checkboxes to view the capability or performance statistics.
17. The results grid is organized by Test Property and Test Method, and displays the test results in columns as follows:
- a. Operation.
  - b. Workcenter.
  - c. Sample Location (for x-bar test methods).
  - d. N = The total number of tests performed.
  - e. LSL = Lower spec limit.
  - f. Target = Target.
  - g. USL = Upper spec limit.
  - h. Avg = Average of all test results.
  - i. Avg VFT = The average variance from target of all test results.
  - j. Exc = Number of specification excursions.
  - k. Capability and Performance = Cp, Cpk, Pp, and Ppk indices.
18. Click on the “View Capability Report” hyperlink to access the capability report for the corresponding manufacturing order.
19. Click on the desired “N” hyperlink to open the corresponding test method’s SPC page containing the control chart and histogram.

**Manufacturing Order Results**

Orders... 2123458  Operation **All** Shift **All**

View **Overview Only**  Capability  Performance

[View Capability Report](#)

<b>CrestHill</b> Pizza Line 1 All Shifts	Production Date 2019-04-10 <input type="button" value="CDT"/>	Product Number 0700430	Customer Number 0070020504
	Manufacturing Order 2123458	Product 12" TNB WIP CRUST	Customer ACME Corporation

Test Property / Test Method			Quality Specifications						Capability Performance				
Operation	Workcenter	Location	N	LSL	Target	USL	Avg	Avg VFT	Exc	Cp	Cpk	Pp	Ppk
<b>VM Dimensions / CRH-3000-Diameter-X-Oven-Product-n3</b>													
CRH-Line-1-Oven	CRH_Line_1_Oven	<b>Multi</b>	<b>72</b>	11.50	12.00	12.50	<b>12.16</b>	0.16		2.46	1.66	0.92	0.62
		<b>Average</b>	<b>24</b>	1.50	12.00	12.50	<b>12.16</b>	0.16		1.36	0.92	0.99	0.67
		<b>Range</b>	<b>24</b>				<b>0.11</b>						
		Lane A	<b>24</b>	11.50	12.00	12.50	<b>12.14</b>	0.14		1.15	0.83	0.90	0.64
		Lane B	<b>24</b>	11.50	12.00	12.50	<b>12.18</b>	0.18		1.38	0.89	0.92	0.59
		Lane C	<b>24</b>	11.50	12.00	12.50	<b>12.17</b>	0.17		1.19	0.78	0.91	0.59



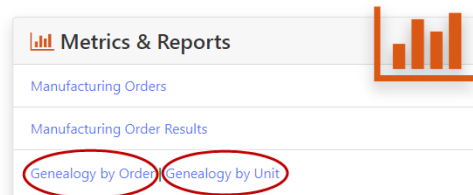
# Chapter 6: Genealogy Reports

## Integration

The genealogy reports require integration and programming with the local ERP or MES to obtain genealogy information (order, input units, and produced units). This integration and programming work is not included in the PatrolSuite license, and is performed on a time and materials basis should a customer desire the PatrolSuite genealogy reports to be functional.

## Navigation to Genealogy Reports

20. To view a genealogy report, click the desired report in the Metrics & Reports card on the PatrolSuite homepage.

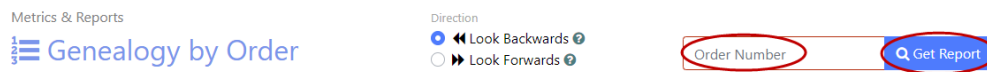


**Genealogy by Order:** Displays the related orders as raw materials are turned into finished products. This may include purchase orders (for raw materials), manufacturing orders, and shipping orders. Provides the specific units produced for a given order.

**Genealogy by Unit:** For a subject unit looking backwards, displays the specific identity of the units that were consumed to produce the subject unit (inputs). For a subject unit looking forwards, displays the specific identity of the units that subsequently consumed subject unit (outputs).

## Genealogy by Order

21. Enter the desired order number and click the Get Report button.



22. In the Genealogy section, the subject order will appear at level “0” (looking backwards by default). Each level identifies an order that produced product that was consumed in the subject order at level “0.” Each of the levels will have negative numbers to indicate a backwards view. Positive numbers indicate a forward view.

- a. Click the ‘Look Backwards’ or ‘Look Forwards’ radio button to change the view of the subject order.



- b. Click on the double backwards or double forwards arrows to view the genealogy of the desired order.

23. In the Produced Units section, the operations and workcenters associated with the subject order (the order at level "0") are displayed, and the units produced by the subject order are listed.
  - a. Click on a desired unit to see the genealogy related to the unit.

Metrics & Reports

### Genealogy by Order

Order: 1762876 | Direction: Look Backwards

Direction:  Look Backwards  Look Forwards

Unit Number: 1762876 | Get Report

**Genealogy**

Level	Order	Product
0	1762876	15093 TB FLATBREAD MELT 5"X6" 192/2.1OZ
-1	1982451	15993 GOURMETSUGAR CDO 140/2Z
-2	1758178	16109 DDSDRDMFNBLB96/5.25Z
-3	1752856	15898 WM16TNBSUPP26/50.5Z

**Produced Units**

FTN-Line-1-Mixer2 @ FTN\_Line\_1\_Mixer2

1762876-0026C913-8F8	1762876-4CA22E34-7AE	1762876-B2287245-118
1762876-00781FE8-038	1762876-4CB95FDD-865	1762876-B23FD952-A58
1762876-06D21EAD-24A	1762876-4CE74547-A95	1762876-B2A2B363-052

## Genealogy by Unit

24. Enter the desired unit number and click the Get Report button.

Metrics & Reports

### Genealogy by Unit

Direction:  Look Backwards  Look Forwards

Unit Number: | Get Report

25. In the Genealogy section, the subject unit will appear at level "0" (looking backwards by default). Each level identifies a unit that was consumed to produce the subject unit at level "0." Each of the levels will have negative numbers to indicate a backwards view. Positive numbers indicate a forward view.
  - a. Click the 'Look Backwards' or 'Look Forwards' radio button to change the view of the subject unit.
  - b. Click on the double backwards or double forwards arrows to view the genealogy of the desired unit.

Metrics & Reports

### Genealogy by Unit

Unit: 1850478-82B30409-B96 | Direction: Look Backwards

Direction:  Look Backwards  Look Forwards

Unit Number: 1850478-82B30409-B96 | Get Report

**Genealogy**

Level	Unit Number	Operation	Product
0	1850478-82B30409-B96	ARL-Gallon	03103 TRES RICHES(US)8.8LB
-1	1861387-2644AC32-810	ARL_Gallons	15993 GOURMETSUGAR CDO 140/2Z
-2	1982451-180220112605		16109 DDSDRDMFNBLB96/5.25Z
-3	1758178-C00FBD1C-3E5		15898 WM16TNBSUPP26/50.5Z



# Chapter 7: C&P Configuration

## Introduction

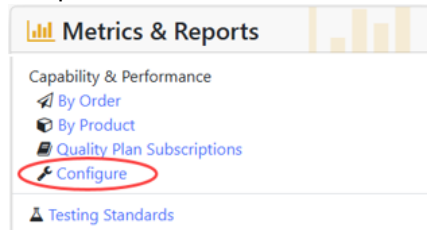
The Capability & Performance configuration page contains the index range values that correspond to the performance criteria (e.g. Great, Good, Acceptable, Poor, Bad, Very Bad).

**Note:** This is a “global” setting, so changes will apply to the Capability & Performance reports for all users.

## Edit

26. To view and edit the Capability & Performance index values, click on the “Configure” hyperlink in the Metrics & Reports card on the PatrolSuite homepage.

**Note:** Only users in the Metrics & Reports Administrator roles will be able to access Configuration.



a. Click on the ‘Edit’ button.

**Note:** The out-of-the-box range values are shown in the image below.

Capability & Performance

### Setup

Define the global capability and performance index ranges



		Cp	Cpk	Pp	Ppk
Great	>=	1.66	1.66	1.89	1.66
Good	>=	1.33	1.33	1.33	1.33
Acceptable	>=	1	1	1	1
Poor	>=	0.66	0.66	0.66	0.66
Bad	>=	0.33	0.33	0.33	0.33
Very Bad	>=	0	0	0	0



b. Enter the desired index values and click the 'Save Changes' button.

**Note:** A value for each criterion is not required. The result from the below image is the use of only four colors to reflect Cp criteria.

- Purple** = > 1.66
- Green** = 1.0 – 1.66
- Orange** = 0.33 – 1.0
- Red** = 0 – 0.33

	Cp	Cpk	Pp	Ppk
Great	>= 1.66	1.66	1.66	1.66
Good	>= <input type="text"/>	1.33	1.33	1.33
Acceptable	>= 1.00	1.00	1.00	1.00
Poor	>= <input type="text"/>	0.66	0.66	0.66
Bad	>= 0.33	0.33	0.33	0.33
Very Bad	>= 0	0	0	0

27. Also note that the criterion labels can be changed via the PatrolSuite Admin/Translation page (requires permissions to access).

**Note:** Changing these labels will affect all other facilities using the same instance of PatrolSuite. See the PatrolSuite Core user guide for instructions on how to search for and change the criterion labels.

(Default) > (Default)

### Translation

Search Text  Search

Search Text **Great** Edit Translations

From Language (Default)	To Language (Default)
<b>Great</b>	<b>Great</b>

Values must be greater than or equal to the values below them



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# Chapter 8: C&P Subscriptions

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## End of Manufacturing Order

The capability and performance module allows users to receive a notification at the end of a manufacturing order for a product of interest. However, an 'end of order' signal needs to be sent to PatrolSuite to enable notifications. This signal needs to be created the client, and is typically built into the client's ERP or MES, to call a stored procedure within PatrolSuite called "SetProductionDates."

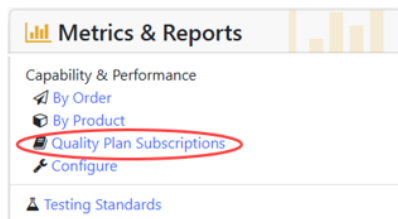
28. Supply the following parameters to the SetProductionDates stored procedure:
- @ProductionOrderNumber = \_\_\_\_ (required)
  - @ProductionCompleteDate = \_\_\_\_ (datetime) (required)
  - @ProductionStartDate = \_\_\_\_ (datetime) (optional)

**Note:** This stored procedure should be called only one time per manufacturing order (at the end of the production run). If the stored procedure is called more than once, then more than one notification will be sent to subscribers.

---

## Quality Plan Subscriptions

29. To subscribe to a Capability & Performance report, click on the "Subscriptions" hyperlink in the Metrics & Reports card.



The Quality Plan Subscriptions page will open. This page contains a list of all the quality plans that have been created in QualityPatrol. A quality plan defines the product testing and process parameter requirements and specifications for a given product/customer combination at each applicable manufacturing operation.

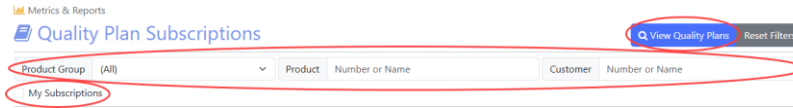
- To locate a quality plan of interest, select the desired product group from the Product Group filter, or enter the Product or Customer number and click the 'View Quality Plans' button.

**Note:** Check the My Subscriptions checkbox to see the quality plans to which you are subscribed.

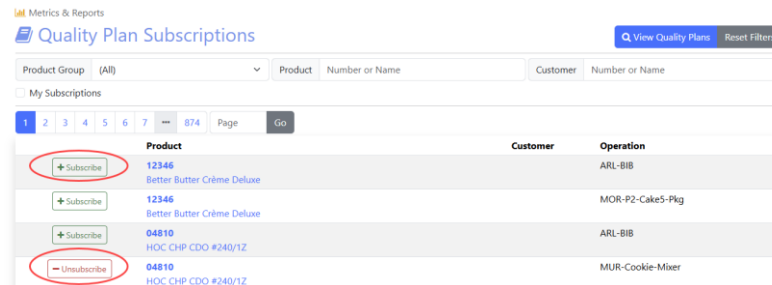
# Metrics & Reports

## User Guide

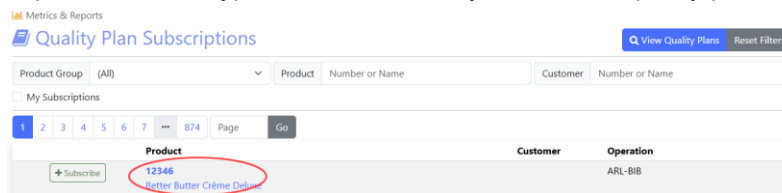
Version 2026-04



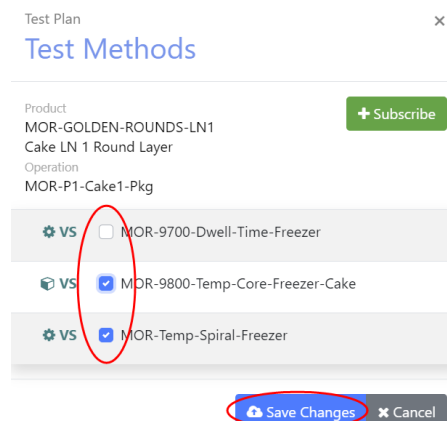
30. To receive notifications each time a manufacturing order is completed, click on the Subscribe button for the desired product/customer/operation. To cancel a subscription, click on the Unsubscribe button.



31. To define a personalized set of data that will appear (or not appear) in your Capability & Performance report, click on the product name hyperlink for a currently subscribed quality plan.



32. A list of the *variable* test methods within the chosen quality plan will appear. Click the checkbox for the test methods that you want to be included in your Capability & Performance reports. Then click the 'Save Changes' button.



**Note:** Subscribe or unsubscribe to the quality plan by clicking on the Subscribe or Unsubscribe button.

**Note:** Test methods selected within this window are automatically selected in other quality plans to which the user subscribes.



# Chapter 9: C&P Notifications

## Introduction

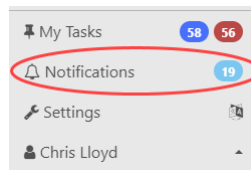
Notifications advise users of events that originate in PatrolSuite modules, including Metrics & Reports, that do not *require* action and do not have a due date. A capability report is a good example. The report does not require a user to take any action and there is no due date.

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

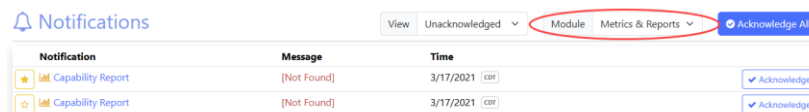
See the PatrolSuite Core user guide for more information about the notification system.

## User Notifications

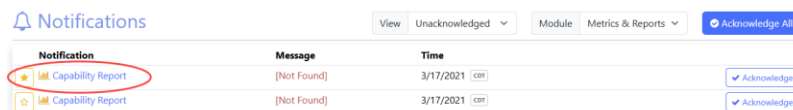
33. To view your notifications, click on “Notifications” in the main PatrolSuite menu.



34. By default, the Notifications page displays a user’s unacknowledged notifications in bold text. To view your capability notifications, click on “Metrics & Reports” in the Module filter.



35. To view a capability report, click on the desired notification hyperlink.

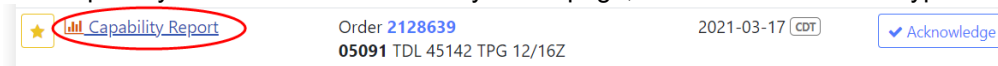




## Chapter 10: C&P Metrics by Order

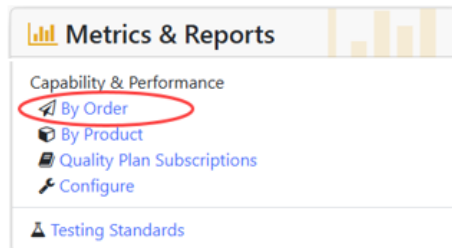
### Access

36. To view the Capability & Performance metrics by Order page, click on a notification hyperlink.

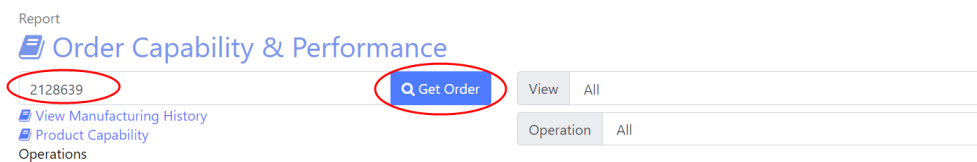


Note that clicking on the Order Number hyperlink in the notification will take the user to the Manufacturing History page.

a. Or click on the Order hyperlink in the Capability & Performance menu.



b. Enter the desired order number and click on the 'Get Order' button.



### Overview

This page enables a user to analyze capability & performance metrics for a single manufacturing order.

37. The Order Capability & Performance page is organized into nine areas:

- Order Number Search – Enables users to retrieve metrics for a desired order number.
- Filters – Filters the test methods and operations displayed within the report.
- Navigation menus – Enables navigation to other report pages, or refinement of the test methods displayed within the report.
- Order Information.
- Performance Criteria key for the colors displayed within the metrics.
- Average capability scores for the entire order.

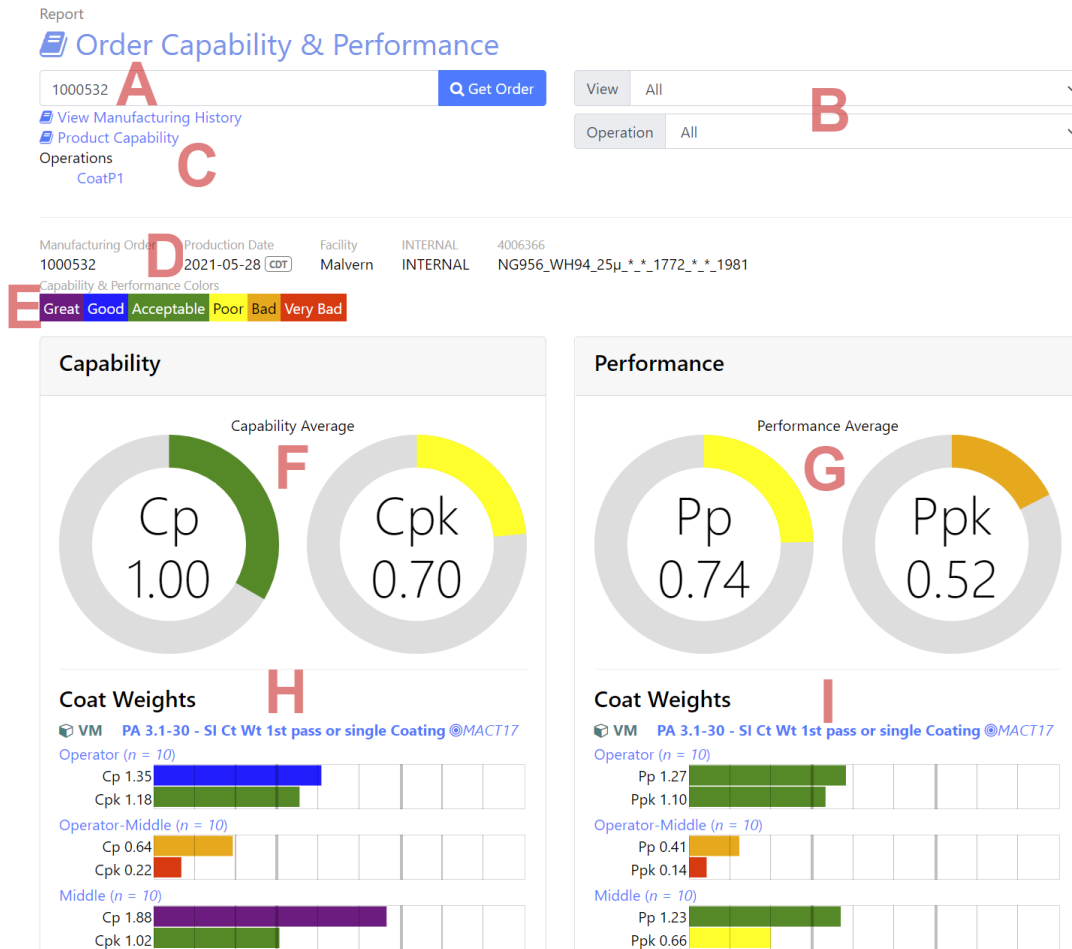
# Metrics & Reports

## User Guide

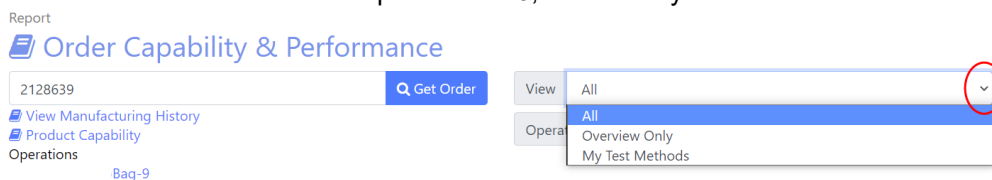
Version 2026-04



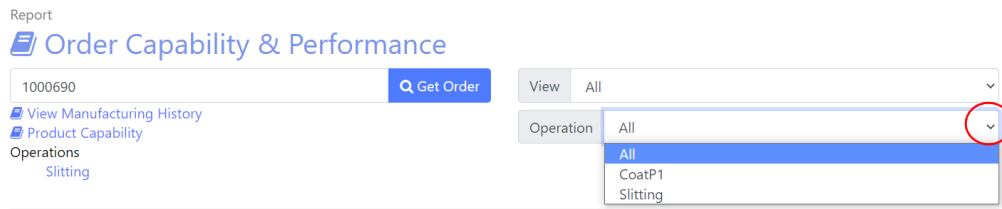
- g. Average performance scores for the entire order.
- h. Capability scores for each test method.
- i. Performance scores for each test method.



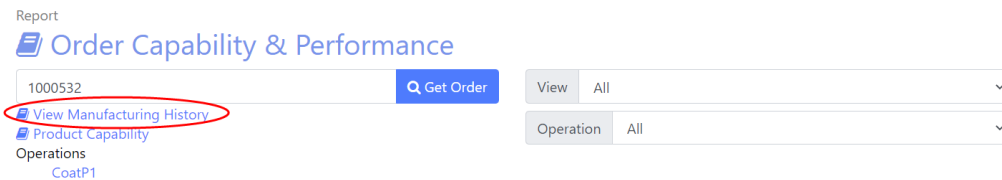
38. Click on the View dropdown. “All” test methods is the default. To view only the “Overview” test methods (as defined for DashPatrol for the applicable facility), choose “Overview Only.” To view only the personalized test methods chosen in steps 12 and 13, choose “My Test Methods.”



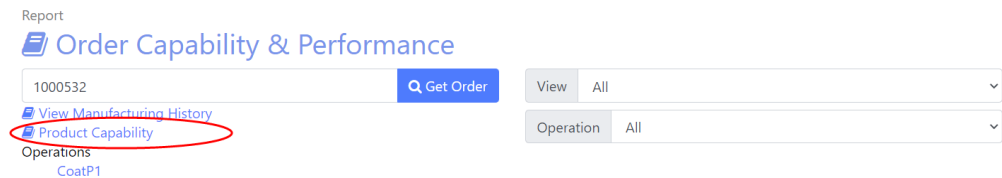
39. If a manufacturing order is completed across multiple operations, then to view test methods from a certain operation, click on the Operation dropdown and choose the desired operation.



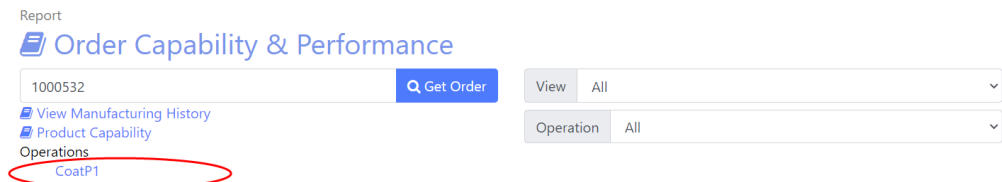
40. Click on the View Manufacturing History hyperlink to view the manufacturing history report for the order.



41. Click on the Product Capability hyperlink to view the Capability & Performance report for the applicable product.



42. Click on the desired Operations hyperlink to view and manage the personalized test methods for the applicable quality plan, or to subscribe/unsubscribe to the applicable quality plan.



## Order Capability

The metrics and statistical data relating to the capability of the order are found in the Capability card.

The content in this card is organized as follows:

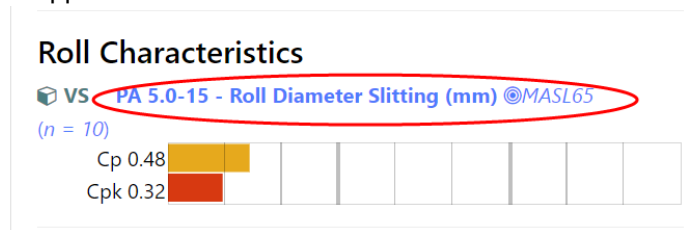
- A. **Cp for the entire order** – This is the average of Cp for all test methods displayed on the page. Note that the Cp value will change depending on the “View” selection (i.e. My Test Methods vs. Overview Only). In the image below, the Cp is displayed in green, which corresponds to “acceptable” performance as can be seen in the color key.
- B. **Cpk for the entire order** – This is the average of Cpk for all test methods displayed on the page. Note that the Cpk value will change depending on the “View” selection (i.e. My Test Methods vs. Overview Only). In the image below, the Cpk is displayed in yellow, which corresponds to “poor” performance as can be seen in the color key.
- C. **Test Family** – The individual test method indices are organized by test family.
- D. **Test Method** – The test method type (VMI in the above example), number, and name.
- E. **Sample Location** – For VMI test types, the indices are displayed by sample location.



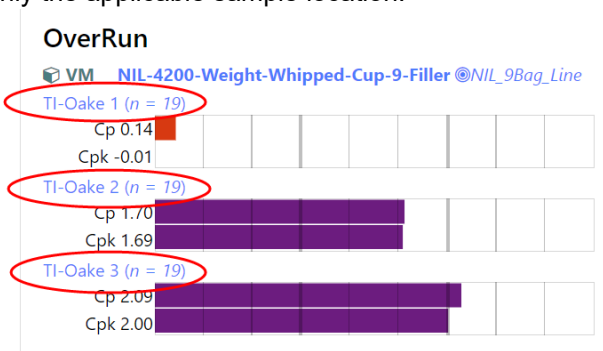
F. Cp and Cpk values for the test method/sample location. A color-coded bar chart is provided to indicate the performance level.



43. Click on the test method name to view the SPC Charts page which displays all of the test result data for the test method for the applicable order.



**Note:** For VMI data, Clicking on the test method hyperlink will take the user to the SPC Charts page for “all” the sample locations. Clicking on the sample locations hyperlink will take the user to the SPC Charts page for only the applicable sample location.



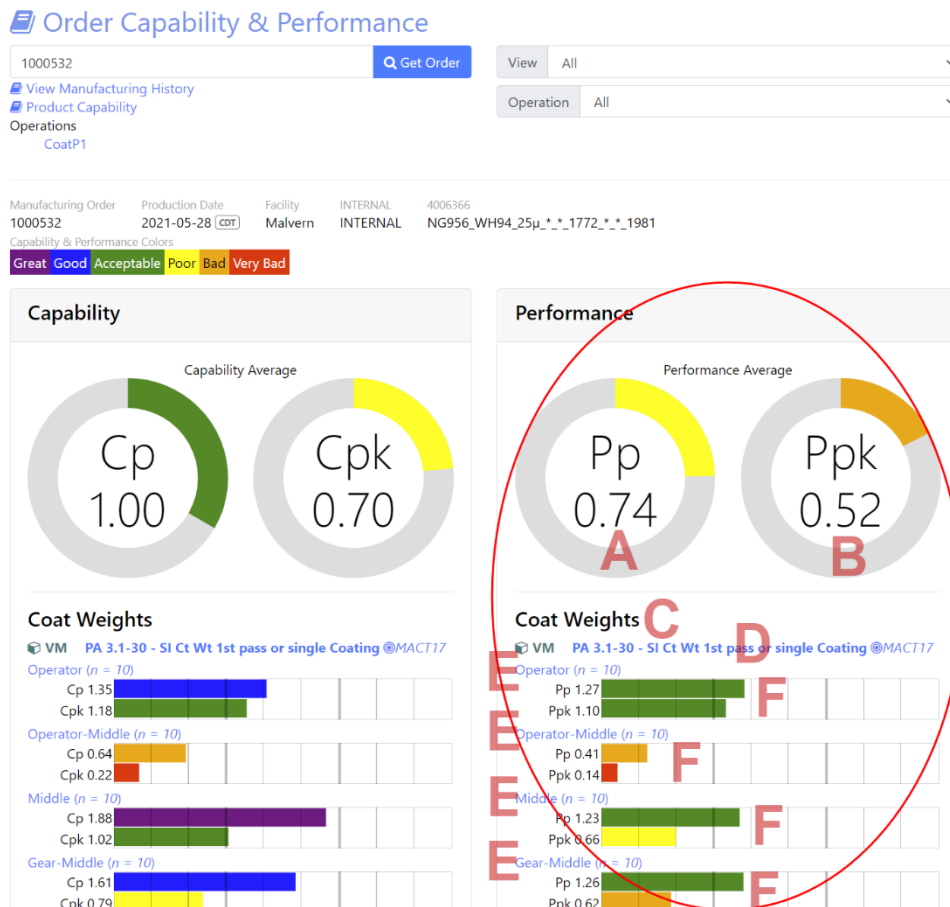


## Order Performance

The metrics and statistical data relating to the performance of the order are found in the Performance card.

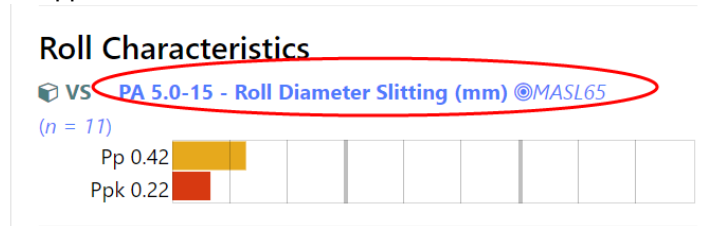
44. The content in this card is organized as follows:

- A. **Pp for the entire order** – This is the average of Pp for all test methods displayed on the page. Note that the Pp value will change depending on the “View” selection (i.e. My Test Methods vs. Overview Only). In the image below, the Pp is displayed in yellow, which corresponds to “poor” performance as can be seen in the color key.
- B. **Ppk for the entire order** – This is the average of Ppk for all test methods displayed on the page. Note that the Ppk value will change depending on the “View” selection (i.e. My Test Methods vs. Overview Only). In the image below, the Ppk is displayed in orange, which corresponds to “bad” performance as can be seen in the color key.
- C. **Test Family** – The individual test method indices are organized by test family.
- D. **Test Method** – The test method type (VMI in the above example), number, and name.
- E. **Sample Location** – For VMI test types, the indices are displayed by sample location.
- F. **Pp and Ppk values for the test method/sample location.** A color-coded bar chart is provided to indicate the performance level.

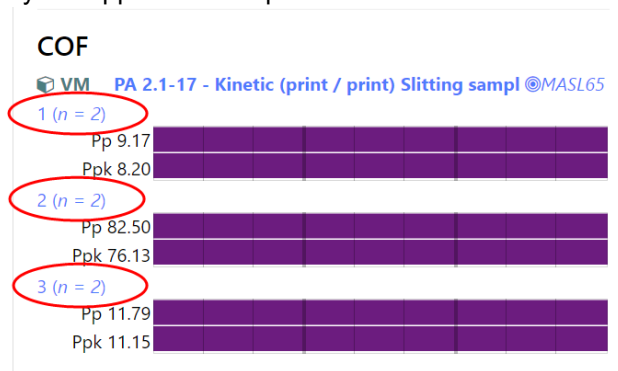




45. Click on the test method name to view the SPC Charts page which displays all of the test result data for the test method for the applicable order.



**Note:** For VMI data, Clicking on the test method hyperlink will take the user to the SPC Charts page for “all” the sample locations. Clicking on the sample locations hyperlink will take the user to the SPC Charts page for only the applicable sample location.

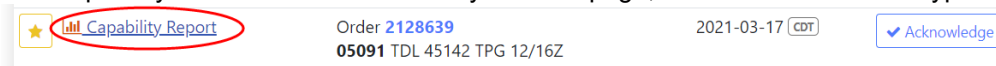




# Chapter 11: C&P Metrics by Product

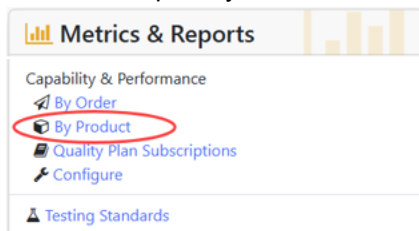
## Access

46. To view the Capability & Performance metrics by Product page, click on a notification hyperlink.

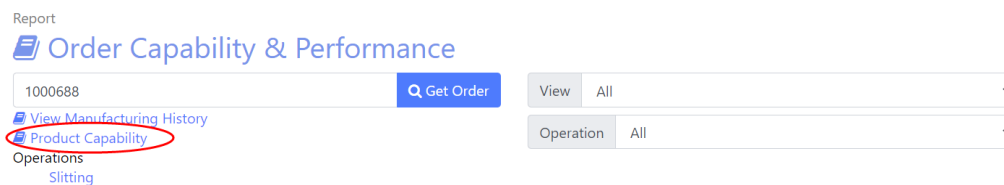


Note that clicking on the Order Number hyperlink in the notification will take the user to the Manufacturing History page.

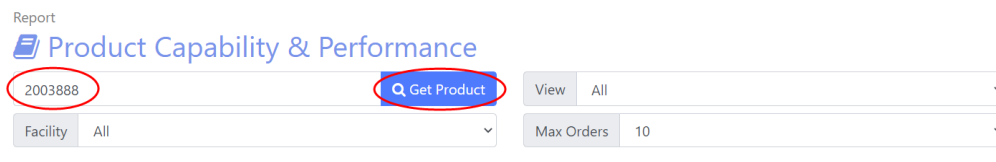
a. Or click on the Product hyperlink in the Capability & Performance menu.



b. Within the Order Capability & Performance page, click on the Product Capability hyperlink.



c. Enter the desired product number and click on the 'Get Order' button.



## Overview

This page enables a user to analyze capability & performance metrics for one product across multiple manufacturing orders.

The Product Capability & Performance page is organized into eleven areas:

# Metrics & Reports

## User Guide

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- A. **Product Number Search.** Enter a product number and click on the Get Product button to retrieve metrics for a desired product number.
- B. **Filters.** Filters the content displayed within the report.
  - i. **Facility:** Choose a facility to limit the data to orders produced at a certain facility.
  - ii. **View:** “All” test methods is the default. To view only the “Overview” test methods (as defined for DashPatrol for the applicable facility), choose “Overview Only.” To view only the personalized test methods chosen in steps 12 and 13, choose “My Test Methods.”
  - iii. **Max Orders:** Select the numbers of orders to be displayed and included in the calculations.
- C. **Product Information.** Displays the chosen products family, number, and name.
- D. **Performance Criteria** key for the colors displayed within the metrics.
- E. **Test Property.** Test methods on this page are grouped by test property.
- F. **Test Method** number and name.
- G. **Capability and Performance index values.** The values displayed are calculated using all orders in section H for the applicable test method.
  - iv. Click on either the Cp or Pp circles to toggle the data displayed in section H between capability and performance.
- H. **Capability and Performance bar charts.** Displays the capability or performance index for each order for the applicable test method. The Cp and Pp bar is in the background in an opaque color. The Cpk and Ppk bar is in the foreground in a solid color.
  - v. Clicking on bars of interest will highlight the applicable order and open the Order Information bar at the bottom of the page.
- I. **Order Information Bar.** Displays the highlighted order information.
  - vi. Click on the Capability hyperlink to return the order’s capability page.
- J. **Order Information Bar Indices.** Displays the average capability and performance indices for all test methods within the highlighted order.

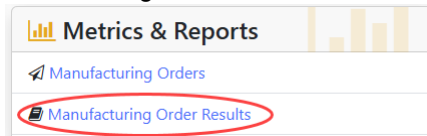




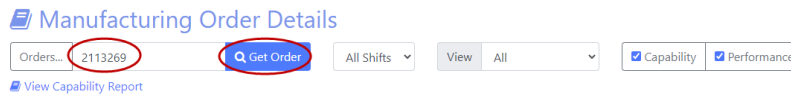
# Chapter 12: SPC Metrics Page

## Access

47. To access the SPC chart for a manufacturing order, click on the Manufacturing Order Details link.



a. Enter the manufacturing order and click the 'Get Order' button.



b. From the Manufacturing History report, Click on the "N" value for the desired test method (VSI methods) or from the desired sample location (MVI methods).

**Manufacturing Order Details**

Orders: 1000532 **Get Order** All Shifts View All  Capability  Performance

[View Capability Report](#)

**Malvern**  
**Coating - All Shifts**

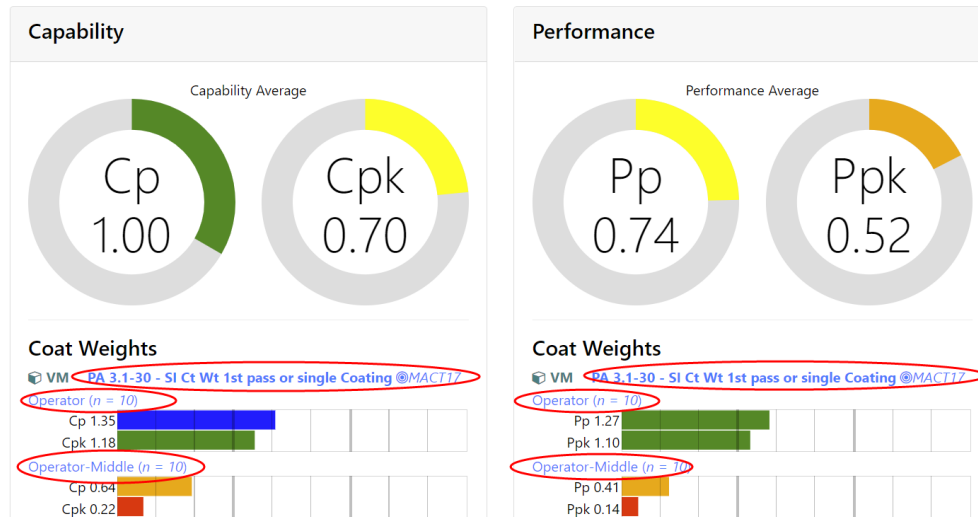
Production Date: 2021-05-28 (COT)  
 Manufacturing Order: 1000532

Product Number: 4006366  
 Product: NG956.WH94.25µ.\*.\*.1772.\*.\*.1981INTERNAL

Customer Number: INTERNAL  
 Customer: INTERNAL

Test Family / Test Method	Operation	Workcenter	Location	Quality Specifications					Capability Performance					
				N	LSL	Target	USL	Avg	Avg VFT	Exc	Cp	Cpk	Pp	Ppk
VM Coat Weights / PA 3.1-30 - SI Ct Wt 1st pass or single Coating														
CoatP1		MACT17		50	0.900	1.000	1.100	0.959	-0.041	5	0.82	0.49	0.72	0.43
				10	0.900	1.000	1.100	0.959	-0.041		1.45	0.86	1.15	0.68
				10				0.094						
			Operator	10	0.900	1.000	1.100	0.987	-0.013		1.35	1.18	1.27	1.10
			Operator-Middle	10	0.900	1.000	1.100	0.935	-0.065	5	0.64	0.22	0.41	0.14
			Middle	10	0.900	1.000	1.100	0.954	-0.046		1.88	1.02	1.23	0.66
			Gear-Middle	10	0.900	1.000	1.100	0.949	-0.051		1.61	0.79	1.26	0.62
			Gear	10	0.900	1.000	1.100	0.972	-0.028		1.30	0.94	1.08	0.78

c. From the Order Capability & Performance report, click on the hyperlink for the desired VSI test method, or the sample location for VMI methods.



The SPC page will open.

## SPC Page Overview

This page provides SPC metrics and statistics for a chosen product/customer/operation (quality plan) across one or more manufacturing orders.

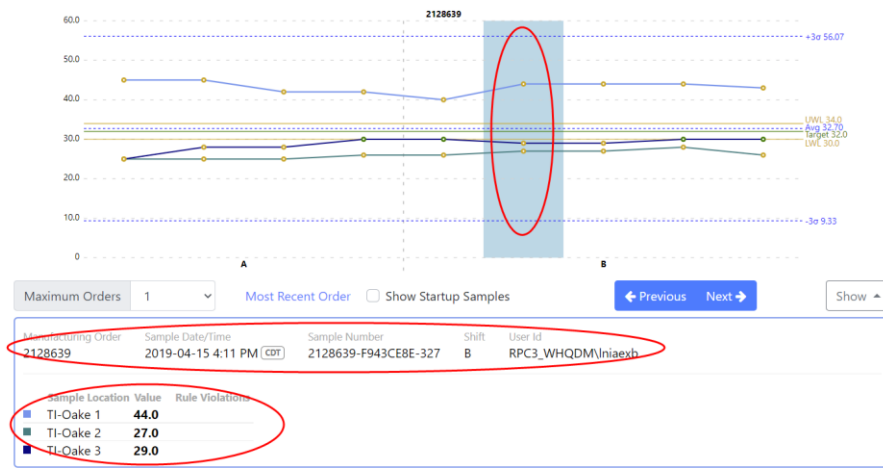
48. The SPC Metrics page is organized into eight areas:

- A. **Test method** information.
- B. **Product/Customer/Workcenter** information.
- C. **Control chart**.
- D. **Control chart controls**.
- E. **Sample information** (applies to the selected data point).
- F. **Statistical summary** (applies to all the data displayed within the control chart).
- G. **Histogram** (applies to all the data displayed within the control chart).
- H. **Box & Whiskers** plots (applies to each manufacturing order displayed within the control chart).

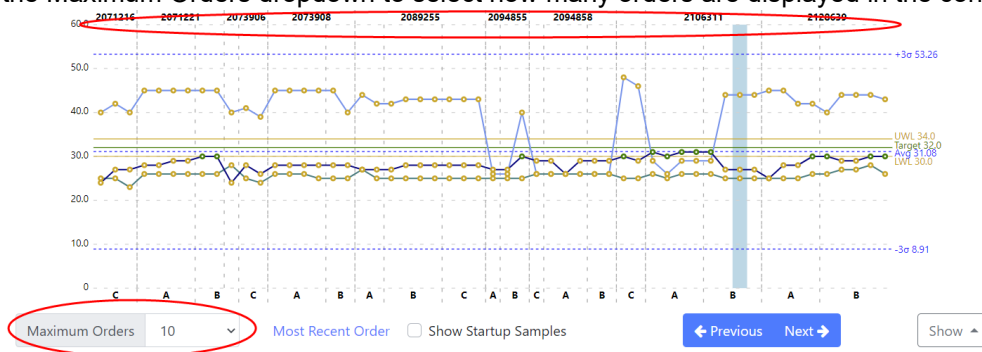


## Control Chart, Histogram, Box & Whiskers

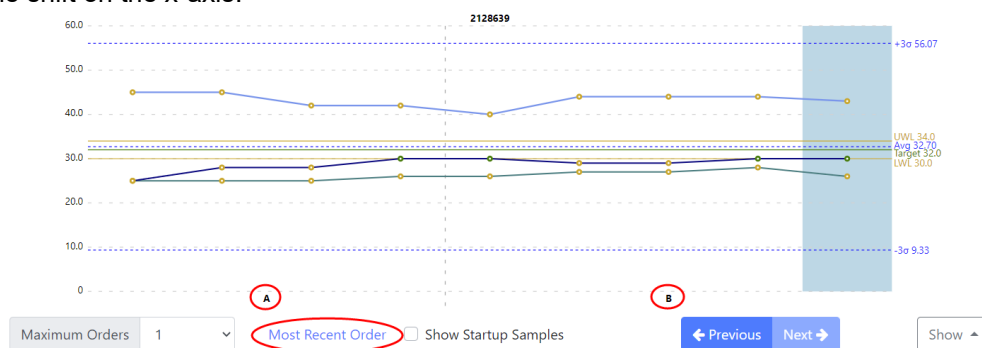
49. Click on a data point of interest within the control chart. The data point will become highlighted and the sample information and value (i.e. test result(s)) will be displayed in the sample information frame. Note that if a data point represents a pattern rule violation, the applicable violation(s) will be displayed in the sample information frame.



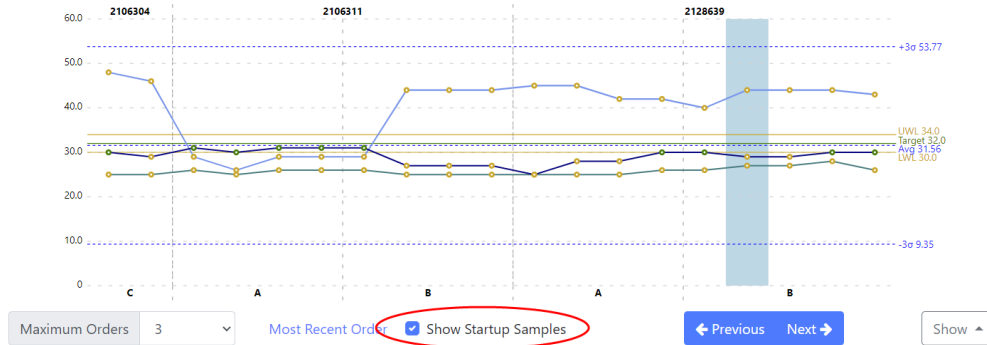
50. Click on the Maximum Orders dropdown to select how many orders are displayed in the control chart.



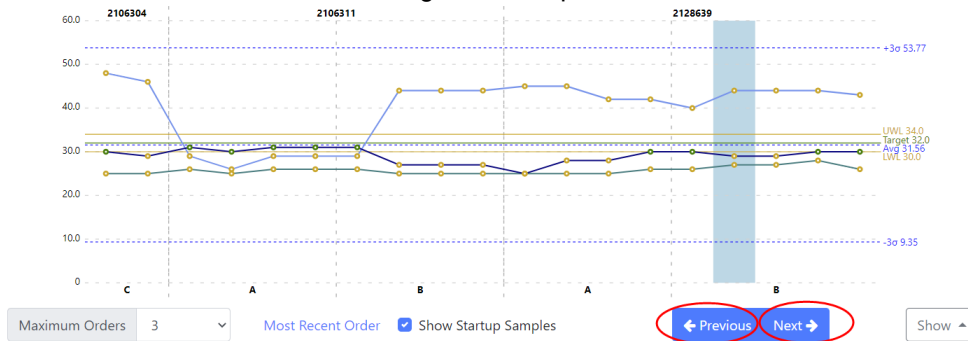
51. Click on the Most Recent Order hyperlink to view the most recent order. Note that, if the ERP/MES integration is configured to send shift information to PatrolSuite, then the control chart will display the applicable shift on the x-axis.



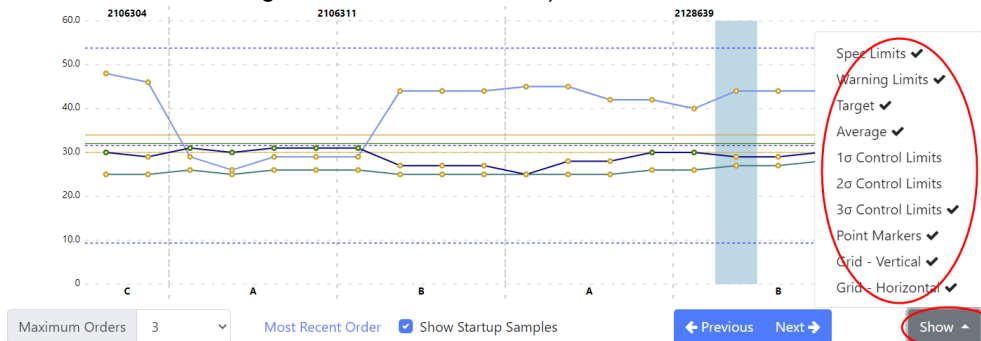
52. By default, the control chart displays "Production" samples only. Check the Show Startup Samples checkbox to include start-up samples in the control chart. Uncheck the checkbox to remove the start-up samples.



53. Click on the Previous or Next arrows to change the data point selected in the control chart.



54. Click on the Show button and then check (or uncheck) the desired control chart display settings. Changes to the display settings will not affect the sample information, statistical summary, or any of the SPC metrics (the control chart, histogram, or box & whiskers).



55. The Sample Information frame is not actionable. It is a read-only reflection of the data point selected in the control chart.

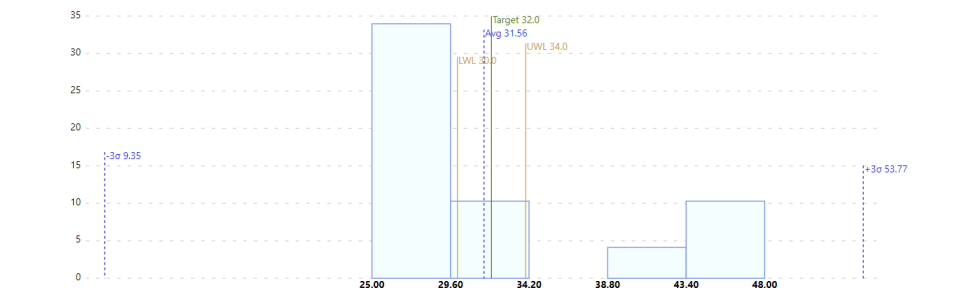


Manufacturing Order 2128639	Sample Date/Time 2019-04-15 4:11 PM (CST)	Sample Number 2128639-F943CE8E-327	Shift B	User Id RPC3_WHQDM\lniaexb												
<table border="1"> <thead> <tr> <th>Sample Location</th> <th>Value</th> <th>Rule Violations</th> </tr> </thead> <tbody> <tr> <td>TI-Oake 1</td> <td>44.0</td> <td></td> </tr> <tr> <td>TI-Oake 2</td> <td>27.0</td> <td></td> </tr> <tr> <td>TI-Oake 3</td> <td>29.0</td> <td></td> </tr> </tbody> </table>					Sample Location	Value	Rule Violations	TI-Oake 1	44.0		TI-Oake 2	27.0		TI-Oake 3	29.0	
Sample Location	Value	Rule Violations														
TI-Oake 1	44.0															
TI-Oake 2	27.0															
TI-Oake 3	29.0															

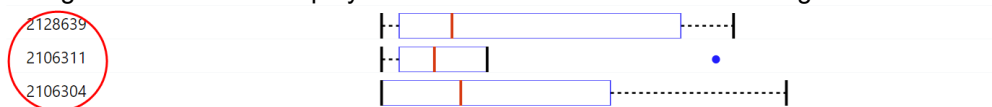
56. The Statistical Summary frame is not actionable. It is a read-only reflection of *all* of the data points displayed in the control chart.

54.1E	1E-12	0.32	100%	300	31.2E	100%	100%
-1.0	-5.0	-3.0	გომეი ჰბეს ქმარქ	გომეი მკარმარე ქმარქ	კლემარე	ცბქ	ქბქ
10	38.0Δ	40.3Δ	23.1Δ	100%	340	35.0	100%
11	+1.0	+5.0	+3.0	ქბბეი ჰბეს ქმარქ	ქბბეი მკარმარე ქმარქ	ქმარქ	ცბ

57. The Histogram is not actionable. It is a read-only reflection of *all* of the data points displayed in the control chart



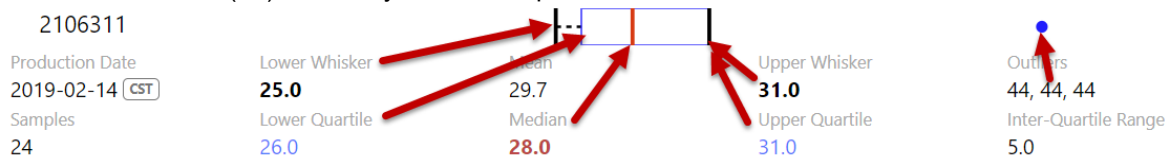
58. The Box & Whiskers diagrams reflect *all* of the data points displayed in the control chart. The applicable manufacturing order number is displayed to the left to the box & whisker diagram.



59. Click on a Box & Whisker diagram of interest to open the corresponding statistical summary.



60. The map of the statistical data relating to a box & whisker diagram is as follows. In the example below, the upper quartile and upper whisker have the same value, and there are three outliers, each of which have the same value (44), thus only one outlier point.





---

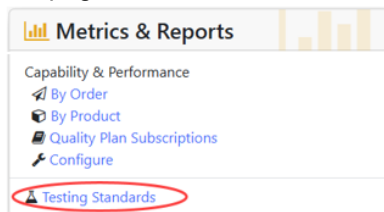
# Chapter 13: Testing Standards Report

---

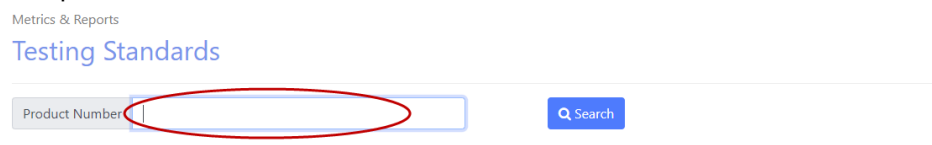
## Access

The purpose of the testing standards report is to allow users to quickly view the quality plan for a product of interest without going into the QDMS Admin Panel. This report is often used for customer or product quality reviews because it provides visibility into all manufacturing steps for a given product number.

61. To view the Testing Standards report page, click on the “Testing Standards” hyperlink from the Metrics & Reports card on the PatrolSuite homepage.



62. Enter the desired product number and click the ‘Search’ button.



---

## Organization

The testing standards report is organized as follows:

- A. **Filters**
- B. **Product information**
- C. **Operation.** The report will display all operations where test plans have been defined to product the applicable product. The quality state which is automatically assigned for a sample where all testing is complete, and all results are in spec, is displayed. Additionally, the quality plan comments are displayed.
- D. **Test Property.** The test methods are grouped by test property.
- E. **Test Method** and the corresponding testing requirements and specs.



Metrics & Reports

### Testing Standards

Product Number: 0194 Change Product Customer: None

Test Type: All  View only certificate methods A Operation: All

**Product B**

01946 BK .TBRD12

**SAA-Line-1-Die-Cutter-Proofer C**

Automatically Assigned Quality State: None

Quality Plan Comments: 6.75" x 6.75" FLAT 3.3 oz ALLERGEN: MILK

Test Method	Units	Frequency	Sample Locations	Specifications
<b>Dimensions D</b>				
<b>VM SAA-3000-Diameter-X-Raw-Product-n3(6)</b> <span>E</span>	in	Prod Start	Lane 1	USL 7.00
			Lane 3	Target 6.75
			Lane 6	LSL 6.50
<b>VM SAA-3000-Diameter-Y-Raw-Product-n3(6)</b> <span>E</span>	in	30 Min	Lane 1	USL 7.75
			Lane 3	Target 7.50
			Lane 6	LSL 7.25
<b>Weights D</b>				
<b>VM SAA-4004-Weight-Raw-Product-n(6)</b> <span>E</span>	Oz	30 Min	Lane 1	USL 3.80
			Lane 2	Target 3.60
			Lane 3	LSL 3.40

63. Apply the filters as desired to change the report contents.

- Test Type.**
- View Only CoA.** This will display only those test methods reported on the corresponding customer CoA. Such test methods are identified by the CoA badge.

<b>VM SAA-3001-Thickness-Edge-X</b> <span>E</span>	in	1 Hr	First Lane	USL 0.26
		Prod Start	Middle Lane	LSL 0.16

- Customer.** The dropdown displays those customers for which a customer-specific test plan has been created. If "None" is the only choice provided in the dropdown, then no customer-specific test plans have been created.
- Operation.**

64. To save the report, right-click anywhere on the report body and select "Print..."

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Test Method	Units	Frequency	Sample Locations	Specifications
<b>Dimensions</b>				
<ul style="list-style-type: none"> <li>VM SAA-3000-Diameter-X-Finished-Product-L3(ABC)</li> </ul> Diameter X of finished product by piece required from lanes A, B, and C for Flatbreads and Pita products	in	30 Min	Lane A-1 Lane A-2 QA - Prod Start Lane B-1 Lane B-2 Lane C-1 Lane C-2	USL 7.25 Target 6.75 LSL 6.25
<ul style="list-style-type: none"> <li>VM SAA-3000-Diameter-Y-Finished-Products</li> </ul> Diameter Y of finished product by piece required from lanes A, B, and C for Flatbreads and Pita products	in	30 Min	Lane A-1 Lane A-2 QA - Prod Start Lane B-1 Lane B-2 Lane C-1 Lane C-2	USL 7.25 Target 6.75 LSL 6.25

65. Choose “Save as PDF” as the Destination. Choose the desired Options to display the headers and footers or background graphics. Click the Save button.

66. To print the report, right-click anywhere on the report body and select “Print...” Choose the desired destination printer and options to display the headers and footers or background graphics. Click the Save button.



## **NEW** Chapter 14: Preventive Controls

# Report

## Introduction

The Preventive Controls report is a summary of monitoring records required under the U.S. Food and Drug Administration Food Safety Modernization Act (FSMA) showing that preventive controls (e.g. metal detector checks, temperatures, times) are in place, were performed as required, and remain effective.

A Preventive Controls Qualified Individual (PCQI) must review and sign the report, providing clear, traceable evidence that food safety hazards are being controlled in accordance with 21 CFR Part 117 and the facility's food safety plan.

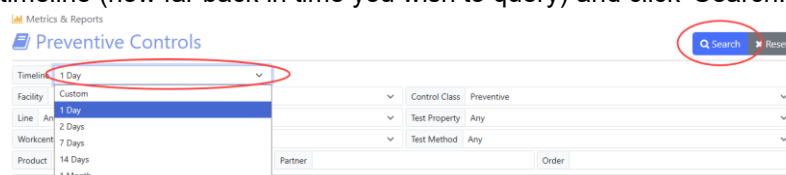
## Access

67. To view the Preventive Controls report page, click on the “Preventive Controls” hyperlink in the Metrics & Reports card on the PatrolSuite homepage.



## Filters

68. Select the desired timeline (how far back in time you wish to query) and click ‘Search.’



# Metrics & Reports

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**Note:** By default, 1 Day is preselected.

**Note:** Choosing “Custom” will enable a “From” and “To” date to be defined.

Metrics & Reports  
Preventive Controls

Timeline: Custom (circled) From: 04/20/2026 To: 04/21/2026

Facility: Morristown Control Class: Preventive

Line: Any Test Property: Any

Workcenter: Any Test Method: Any

Product: Partner Order

69. Select the desired Facility and click ‘Search.’

Metrics & Reports  
Preventive Controls

Timeline: 1 Day

Facility: Morristown (circled) Control Class: Preventive

Line: Any Test Property: Any

Workcenter: Any Test Method: Any

Product: Partner Order

Search (circled) Reset

**Note:** By default, the user’s Primary Facility is preselected. If the user has not chosen his primary facility, then the first facility in the list will be preselected.

70. Select the desired Control Class and click ‘Search.’

Metrics & Reports  
Preventive Controls

Timeline: 1 Day

Facility: Morristown Control Class: Preventive (circled)

Line: Any Test Property: Any

Workcenter: Any Test Method: Any

Product: Partner Order

Search (circled) Reset

**Note:** By default, “Preventive” is preselected since the primary purpose of this report is for monitoring test methods that are preventive controls. However, this report can be used to evaluate test methods in any control class:

- **Not Considered.** Test results for these test methods are not considered when determining the quality state of a sample. Accordingly, an out of specification result will have no impact on the quality state of the sample (the sample will still be approved).
- **Standard.** This test method is **important to the quality or performance of the product**. An out of specification result will prevent the sample from being automatically assigned an Approved quality state. Test results for these test methods should be considered with normal scrutiny when quality management determines the sample’s quality state.
- **Essential.** This test method is **critical to the quality or performance of the product**. An out of specification result will prevent the sample from being automatically assigned an Approved quality state. Test results for these test methods should be considered with elevated scrutiny when quality management determines the sample’s quality state.
- **Preventive.** This test method is **critical to the safety of humans or animals who consume the product**, is a preventive control as defined by food safety regulations, and is a core component of the facility’s overall food safety plan. An out of specification result will prevent the sample from being automatically assigned an Approved quality state. Test results for these test

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methods should be considered with the highest scrutiny when quality management determines the sample's quality state.

71. Select the remaining filters as desired and click 'Search.'

**Note:** By default, the test method filter will include only test methods that have been restricted to the chosen facility. To include test methods that are not restricted to the facility, check the “Include Unrestricted Test Methods” checkbox.

## Data Grid

The total number of test results within specification is displayed in the green pill.  
 The total number of test results outside of specification is displayed in the red pill.  
 The total number of test results without defined specifications is displayed in the gray pill.

Pass: 9668 No Specs: 808 Fail: 236 Show Failures Only  Report Mode

Sample Date	Partner	Test Property	Control	Result Value	
Order	Facility	Test Method Number	Class	Data	
Product Number	Workcenter	Test Method Name	Data	Type	
Product Name	Sample		Type		
2018-04-21 <span>CST</span>	0070020504 ACME Corporation	Date Code	Standard	Pass	Complete, Correct, and Legible
2004641	Morristown	MOR-9100-Verification-Julian-Date	ATT		
03275	MOR_P2_Cake6_Pkg	Verification that the Julian Date printed on the case is complete, correct, and legible			
ALN8*CHOC24/12.5Z	2004641-5299DCD4-C21				

72. To view only outside of specification or failed results, check the “Show Failures Only” checkbox.

Pass: 0 No Specs: 0 Fail: 236  Show Failures Only  Report Mode

Sample Date	Partner	Test Property	Control	Result Value	
Order	Facility	Test Method Number	Class	Data	
Product Number	Workcenter	Test Method Name	Data	Type	
Product Name	Sample		Type		
2018-04-21 <span>CST</span>	0070020504 ACME Corporation	Color	Standard	Fail	4.2
2004641	Morristown	MOR-6201-Color-a	VSI		
03275	MOR_P2_Cake6_Wrapper	Color (a) value for products as measured by the colorimeter			
ALN8*CHOC24/12.5Z	2004641-A49C490D-910				

73. Click on the column headings to sort the data grid.

Pass: 9668 No Specs: 808 Fail: 236  Show Failures Only  Report Mode

Sample Date	Partner	Test Property	Control	Result Value	
Order	Facility	Test Method Number	Class	Data	
Product Number	Workcenter	Test Method Name	Data	Type	
Product Name	Sample		Type		
2018-04-21 <span>CST</span>	0070020504 ACME Corporation	Date Code	Standard	Pass	Complete, Correct, and Legible
2004641	Morristown	MOR-9100-Verification-Julian-Date	ATT		
03275	MOR_P2_Cake6_Pkg	Verification that the Julian Date printed on the case is complete, correct, and legible			
ALN8*CHOC24/12.5Z	2004641-5299DCD4-C21				



## Report

74. To view the Preventive Controls report, click on the “Report Mode” checkbox.

Pass: 9668 No Specs: 808 Fail: 236  Show Failures Only  Report Mode

Sample Date	Partner	Test Property	Control	Result Value
Order	Facility	Test Method Number	Class	
Product Number	Workcenter	Test Method Name	Data	
Product Name	Sample		Type	
2018-04-21 CST	0070020504 ACME Corporation	Date Code	Standard	Pass
2004641	Morristown	MOR-9100-Verification-Julian-Date	ATT	Complete, Correct, and Legible
03275	MOR_P2_Cake6_Pkg	Verification that the Julian Date printed on the case is complete, correct, and legible		
ALN8*CHOC24/12.5Z	2004641-5299DCD4-C21			

**Note:** Applicable filters appear in the report so that this context is not lost when the report is printed.

Metrics & Reports Preventive Controls Search Reset

Timeline Custom From 04/20/2018 To 04/21/2018

Facility Morristown Control Class Any

Line Any Test Property Metal Detector

Workcenter Cake 6 Test Method Any

Product Partner Order

### Preventive Controls Report

Facility: Morristown  
Workcenter: Cake 6  
Date: 04/20/2018 — 04/21/2018  
Test Property: Metal Detector

Signature: \_\_\_\_\_

Pass: 48 No Specs: 0 Fail: 0  Report Mode

Sample Date	Partner	Test Property	Control	Result Value
Order	Facility	Test Method Number	Class	
Product Number	Workcenter	Test Method Name	Data	
Product Name	Sample		Type	
2018-04-21 CST	RICH PRODUCTS CORP	Metal Detector	Standard	Pass
LABAUDITMOR	Morristown	MOR-MD-Verification-Standard	ATT	Pass
LabAudit	Cake 6	Metal Detector or X-Ray Verification: Check that the operators are using the correct unit		
QA Lab Audit	LABAUDITMOR-7205C3E2-FEB			

75. To print the Preventive Controls report, right-click anywhere on the report and select “Print” from the dropdown menu.

### Preventive Controls Report

Facility: Morristown  
Workcenter: Cake 6  
Date: 04/20/2018 — 04/21/2018  
Test Property: Metal Detector

Signature: \_\_\_\_\_

Report Mode

Pass: 48 No Specs: 0 Fail: 0

Sample Date	Partner	Test Property	Control	Result Value
Order	Facility	Test Method Number	Class	
Product Number	Workcenter	Test Method Name	Data	
2018-04-21 CST	RICH PRODUCTS CORP	Metal Detector	Standard	Pass
LABAUDITMOR	Morristown	MOR-MD-Verification-Standard	ATT	Pass
LabAudit	Cake 6	Metal Detector or X-Ray Verification: Check that the operators are using the correct unit		
QA Lab Audit	LABAUDITMOR-7205C3E2-FEB			

Context menu options: Back, Forward, Reload, Save as..., Print..., Cast..., Open in reading mode.

76. Choose the desired printer and click ‘Print.’

# Metrics & Reports

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Sample Date	Partner	Test Property	Control	Result	Value
Order	Facility	Test Method Number	Class		
Product Number	Workcenter	Test Method Name	Data		
Product Name	Sample	Type			
2018-04-21	RICI PRODUCTS	Metal Detector	Standard	Pass	
LABAU21MOR	COBP	MCR MD Verification Standard	AT7		
LABAU21	Morristown	Metal Detector or X-Ray Verification. Check that the operators are using the correct unit metal detector or x-ray standard specified on the specification.			
QA Lab Audit Results	LABAU21MOR	LABAU21MOR			
720SC82	FEB				
2018-04-21	RICI PRODUCTS	Metal Detector	Standard	Pass	
LABAU21MOR	COBP	MD Verification-Unit Fe	AT7		
LABAU21	Morristown	Metal Detector Verification. Check if the unit metal detector detects the Fe standard and that the test product is rejected.			
QA Lab Audit Results	LABAU21MOR	LABAU21MOR			
720SC82	FEB				
2018-04-21	RICI PRODUCTS	Metal Detector	Standard	Pass	
LABAU21MOR	COBP	MD Verification-Unit Fe	AT7		
LABAU21	Morristown	Metal Detector Verification. Check if the unit metal detector detects the Non-Fe standard and that the test product is rejected.			
QA Lab Audit Results	LABAU21MOR	LABAU21MOR			
720SC82	FEB				
2018-04-21	RICI PRODUCTS	Metal Detector	Standard	Pass	
LABAU21MOR	COBP	MD Verification-Unit SS	AT7		
LABAU21	Morristown	Metal Detector Verification. Check that the operators are using the correct unit metal detector standard specified on specification.			
QA Lab Audit Results	LABAU21MOR	LABAU21MOR			
720SC82	FEB				
2018-04-21	RICI PRODUCTS	Metal Detector	Standard	Pass	
LABAU21MOR	COBP	MD Verification-Unit Fe	AT7		
LABAU21	Morristown	Metal Detector Verification. Check if the unit metal detector detects the Fe standard and that the test product is rejected.			
QA Lab Audit Results	LABAU21MOR	LABAU21MOR			
6569775	BA6				

**Note:** Scroll down to the bottom of the Print window and check “Headers and footers” and “Background graphics” as desired in the Options section.

Print using system dialog... (Ctrl+Shift+P)

**Print** **Cancel**