



EventPatrol

Events

Enter customer, product, or order number.

<input type="checkbox"/> My Events	Source Any	Facility Any
User <input type="text"/> Anyone	Department Any	Status Any
Category Any	Manufacturing Line Any	Canceled Not Canceled
Subcategory/Trigger Any	Workcenter Any	

1 2 3 4

Event Next Due	Source Value	Category Subcategory/Trigger	Fi
100 Definition 0/2 2026-03-06 CST	new event	Labeling	EventPatrol
99 Definition 1/1 2026-02-10 CST	VVW's test \$999.00 USD	Environmental Land/Water Emission -...	M
98 Definition 0/7 2026-02-10 CST	Tyler's Event	Foreign Material	Re
97 Definition 0/3 2025-10-04 CDT	test	Environmental	Ac
95 Approval 2025-09-28 CDT	92 4.1.1 Verify that...	ISO 9001	M
92 Definition 3/6 2025-09-28 CDT	Test	Safety Incident Other Policy/Procedure	Q
90 Definition 2/4 2024-12-21 CST	Test	Environmental	Er
89 Approval 2024-12-21 CST	Test	Environmental	Er
85 Closed 1/1 2024-12-21 CST	Complaint 197 R\$36.00 BRL		Ac

EventPatrol

- Dashboard
- New Event
- Events
- Configure

Event 84 Event Owner John Wick

Actions

Definition Approval Implementation Closed

Audit 33 Ended Lead Auditor John Wick Lead Auditee Chris Lloyd Topic Quality Management Facility Brunswick Manufacturing Line Coat P1

4.1 Understanding the Organization and its Context

4.1.1 Verify that the organization has determined external and internal issues relevant to its purpose and strategic direction.

Meets Requirements Chris Lloyd
Score 10. Follows best practices

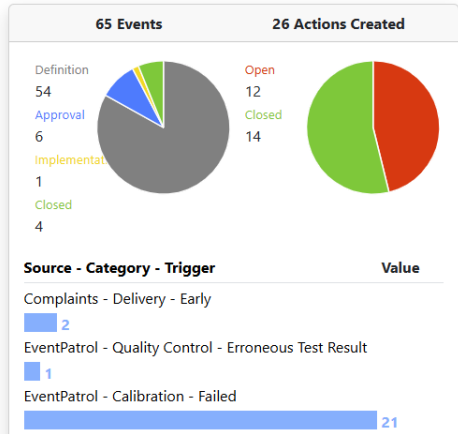
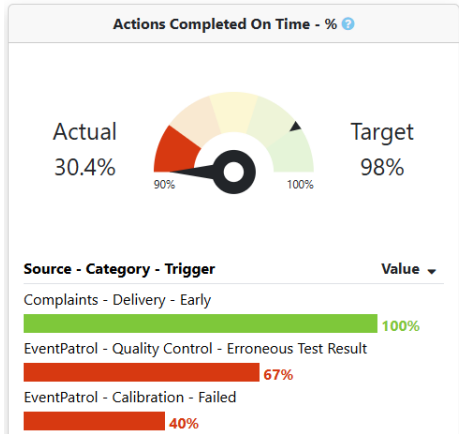
Tasks & Actions Timeline Files 8D Report Event Summary Management Review

Tasks

- Investigation** Complete
John Wick Wednesday, October 2nd 2024
- Root Cause Analysis** Complete
John Wick Wednesday, October 2nd 2024
- Risk Assessment** Complete
John Wick Wednesday, October 2nd 2024







Tasks with Actions

Containment





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Chapter 1: Introduction

Introduction

EventPatrol™ is a centralized and standardized tool to document, to investigate, and to resolve undesirable events that occur throughout the organization. The undesirable events do not have to be related to products, customers, or the manufacturing process. Events could originate from a safety incident, a regulatory or environmental violation, or an audit finding. In short, if an event happens that requires someone to take action, EventPatrol is the tool to coordinate and manage those actions. EventPatrol can be licensed for an additional cost in the absence of AuditPatrol or ComplaintPatrol.

Symbol Key

The following symbols are used in this user guide.

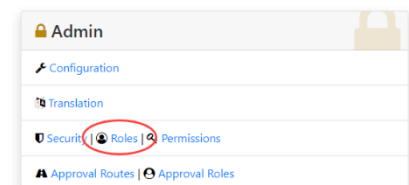
Typeface	Description
	Indicates a “required” data entry field within a UI.
	Indicates a new feature, or new information regarding existing functionality.
	Indicates rules regarding access security.
	Click the help icon to view additional information.

Browser

EventPatrol is accessed via a browser. PatrolSuite, and all its apps such as EventPatrol, 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 EventPatrol app can be accessed.

Roles

1. The EventPatrol app uses Active Directory to provide user-access. From the PatrolSuite homepage, click on Admin/Roles.
2. MAP recommends creating the following EventPatrol Roles. Click on the ‘Add New Role’ button to create the Roles.





Security / Roles

All + Add New Role

Roles

Name	Active Directory Group	Permissions
EventPatrol Dashboard		1 Active
EventPatrol Manager		4 Active
EventPatrol User		2 Active
EventPatrol Viewer		1 Active

- Contact your IT department and request that they create an Active Directory group for each of the above roles and that they associate each role with the Active Directory group.
- Provide the IT department with a list of all users who need to be added into each Active Directory group.
Note: Granting facility access is typically not done via an EventPatrol Role.

Permissions

- MAP recommends granting permissions to each role as follows.
Note: The EventPatrol Dashboard queries can be resource intensive (i.e. network and server), so be thoughtful about what users are given permission to use the dashboard.

EventPatrol Dashboard

EventPatrol		
<input type="radio"/> No	Add Action	Allows users to re-open a closed action task, to add new actions, and to close an action task.
<input type="radio"/> No	Admin	Allows users to edit the configuration settings and all events, including changing the event owner
<input type="radio"/> No	Create	Allows users to create events that originate from EventPatrol.
<input checked="" type="radio"/> Yes	Dashboard	Allows users to view the EventPatrol dashboard.
<input type="radio"/> No	View	Allows users to view all events.

EventPatrol Manager

EventPatrol		
<input checked="" type="radio"/> Yes	Add Action	Allows users to re-open a closed action task, to add new actions, and to close an action task.
<input checked="" type="radio"/> Yes	Admin	Allows users to edit the configuration settings and all events, including changing the event owner
<input checked="" type="radio"/> Yes	Create	Allows users to create events that originate from EventPatrol.
<input checked="" type="radio"/> Yes	Dashboard	Allows users to view the EventPatrol dashboard.
<input checked="" type="radio"/> Yes	View	Allows users to view all events.



EventPatrol User


EventPatrol		
No	Add Action	Allows users to re-open a closed action task, to add new actions, and to close an action task.
No	Admin	Allows users to edit the configuration settings and all events, including changing the event owner
Yes	Create	Allows users to create events that originate from EventPatrol.
No	Dashboard	Allows users to view the EventPatrol dashboard.
Yes	View	Allows users to view all events.


EventPatrol Viewer

EventPatrol		
No	Add Action	Allows users to re-open a closed action task, to add new actions, and to close an action task.
No	Admin	Allows users to edit the configuration settings and all events, including changing the event owner
No	Create	Allows users to create events that originate from EventPatrol.
No	Dashboard	Allows users to view the EventPatrol dashboard.
Yes	View	Allows users to view all events.



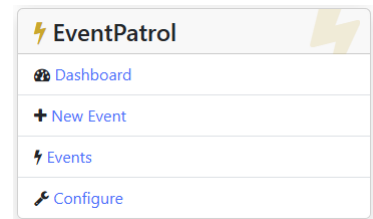
Chapter 2: Navigation

 Users with the following permission can view EventPatrol and its related pages (except the config and dashboard pages which have their own permission).

 View	Allows users to view all events.
--	----------------------------------

EventPatrol Card

6. The EventPatrol card on the PatrolSuite homepage contains hyperlinks to the EventPatrol pages.
 - a. Dashboard. Enables the user to view the EventPatrol dashboard.
 - b. New Event. Enables a user to create a new event that doesn't originate from AuditPatrol or ComplaintPatrol.
 - c. Search. Enables a user to search events including those that originated from AuditPatrol or ComplaintPatrol.
 - d. Configure. Enables a user to access the configuration pages.





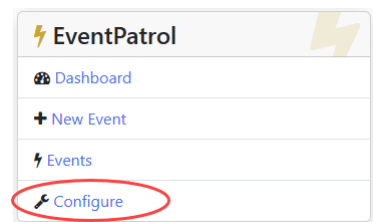
Chapter 3: Configuration

Users with the following permission can view and edit the EventPatrol/Configure pages.

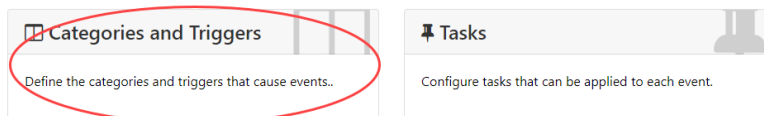
Yes	Admin	Allows users to edit the configuration settings and all events, including changing the event owner
------------	-------	--

Categories

- Click on the “Configure” hyperlink in the EventPatrol card on the PatrolSuite homepage.
- Click on the Categories and Triggers card.

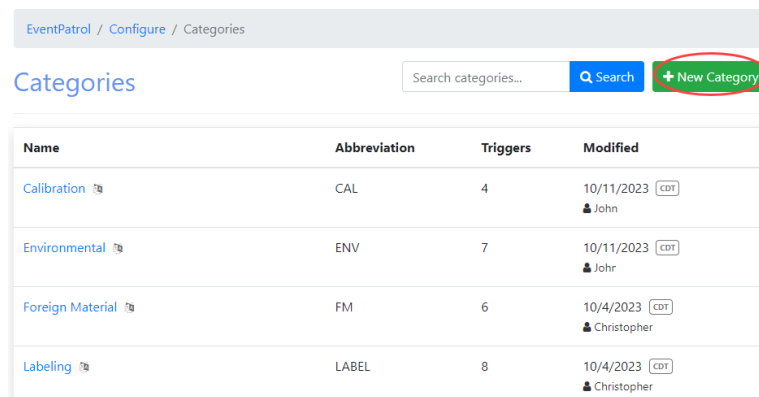


EventPatrol
Configure



The Categories page allows a user to define the categories for which events are organized.

- To add a new category, click on the ‘New Category’ button.



- Enter the category name and abbreviation and click ‘Save Changes.’



EventPatrol / Configure / Categories / New Category

New Category Active Save Changes Cancel

Name

Abbreviation

10. To localize the category into other languages, click the localization icon and edit the desired languages.

EventPatrol / Configure / Categories

Categories Search + New Category

Name	Abbreviation	Triggers	Modified
Calibration	CAL	4	10/11/2023 CDT John I
Environmental	ENV	7	10/11/2023 CDT John

11. To edit an existing category, click the category name.

EventPatrol / Configure / Categories

Categories Search + New Category

Name	Abbreviation	Triggers	Modified
Calibration	CAL	4	10/11/2023 CDT John I
Environmental	ENV	7	10/11/2023 CDT John

a. Click the Edit button.

EventPatrol / Configure / Categories / Calibration / Caliper

Calibration

Caliper Edit Delete

Abbreviation

+ Created Christopher 7/5/2023 3:48 PM CDT

b. Edit the name or abbreviation and click Save Changes.

EventPatrol / Configure / Categories / Calibration / Caliper

Calibration

Caliper Active Save Changes Cancel

Name

Abbreviation

+ Created Christopher 7/5/2023 3:48 PM CDT

Note: Categories that have been consumed by an event cannot be deleted. However, they can be deactivated by unchecking the “Active” checkbox.



Triggers

12. Each category can be further organized into specific triggers that caused the event. Click on the desired category name.

EventPatrol / Configure / Categories

Categories

Name	Abbreviation	Triggers	Modified
Calibration	CAL	4	10/11/2023 John
Environmental	ENV	7	10/11/2023 John

13. To add a new trigger, click on the 'New Trigger' button.

Triggers

Name	Abbreviation	Modified
Failed	CAL-FAIL	10/10/2023 John
Not Calibrated	CAL-NOT	10/9/2023 Christopher

a. Enter the trigger name and abbreviation and click 'Save Changes.'

EventPatrol / Configure / Categories / Calibration /

New Subcategory Active

Name

Abbreviation

14. To localize the trigger into other languages, click the localization icon, click the 'Edit' button, enter the trigger name in the desired languages, and click the 'Save Changes' button.

Triggers

Name	Abbreviation	Modified
Failed	CAL-FAIL	10/10/2023 John
Not Calibrated	CAL-NOT	10/9/2023 Christopher

15. To edit an existing trigger, click the trigger name.



Triggers + New Trigger

Name	Abbreviation	Modified
Failed	CAL-FAIL	10/10/2023 <small>CDT</small> John
Not Calibrated	CAL-NOT	10/9/2023 <small>CDT</small> Christopher

- a. Click the 'Edit' button.

EventPatrol / Configure / Categories / Calibration / Caliper

Calibration

Caliper Edit Delete

Abbreviation CLPR

+ Created Christopher 7/5/2023 3:48 PM CDT

- b. Edit the name or abbreviation and click 'Save Changes.'

EventPatrol / Configure / Categories / Calibration / Caliper

Calibration

Caliper Active Save Changes Cancel

Name Caliper

Abbreviation CLPR

+ Created Christopher 7/5/2023 3:48 PM CDT

Note: Triggers that have been consumed by an event cannot be deleted. However, they can be deactivated by unchecking the "Active" checkbox.

Tasks

- 16. To manage the rules regarding tasks, click on the Tasks card.

EventPatrol

Configure

Categories and Triggers Tasks

Define the categories and triggers that cause events.

Configure tasks that can be applied to each event.

- 17. Click on the desired Task name.



Tasks

Tasks

Name	Allocated Hours	Required
Investigation	240	
Root Cause Analysis	240	
Risk Assessment	240	

Tasks with Actions

Name	Allocated Hours	Required	Action Approval Required
Containment	120		
Safety	120		

18. Click the 'Edit' button.

EventPatrol / Configure / Tasks / Investigation

Task

Investigation Active Edit

Allocated Hours 240

Required

19. Check the "Active" checkbox to make the task active (checked) or inactive (unchecked). Edit the Allocated hours as desired (default = 240). Check the "Required" checkbox to make the task required for every event. Uncheck the "Required" checkbox to let the Event Owner choose whether or not the event is required for each event. Click the help icon ? for additional information.

EventPatrol / Configure / Tasks / Investigation

Edit Task

Investigation Active Save Changes Cancel

Allocated Hours 240

Required

20. For Tasks with Actions, there is an additional "Action Approval Required" checkbox. Check this checkbox to require all actions defined under the task to require approval before the notification is sent to the action responsible person (ARP) to begin the action.

EventPatrol / Configure / Tasks / Containment

Task

Containment Active Edit


Allocated Hours 120

Required

Action Approval Required



Chapter 4: New Event

 Users with the following permission can create new events.

Yes	Create	Allows users to create events that originate from EventPatrol.
------------	---------------	--

Event Sources

Events can originate from three modules within PatrolSuite:

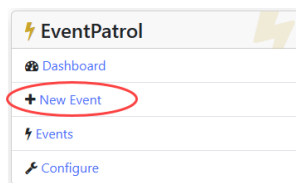
AuditPatrol. Each question in an audit can be related to one event. AuditPatrol events should be created only from within the AuditPatrol app.

ComplaintPatrol. Each customer complaint can be related to one event. ComplaintPatrol events should be created only from within the ComplaintPatrol app.

EventPatrol. **This chapter covers creating events from EventPatrol.**

New Event

21. Click on the “New Event” hyperlink in the EventPatrol card, or on the “New Event” hyperlink in the main menu of EventPatrol.



22. Enter the event title and select the other required fields shown in the image below. Enter additional information as applicable and click ‘Save Changes.’

Note: The user creating the event is assigned as the event owner by default. To choose a different event owner, click on the event owner card and select a user from the user search list.

Note: Upon saving the event, the event owner will receive an action request in his/her My Task list, so choose the correct event owner before saving the event for the first time.

Note: Events themselves do not have a due date. The tasks and actions within the event have due dates.



The screenshot shows a form for creating or editing an event. At the top right, a blue 'Save Changes' button with a floppy disk icon and a grey 'Cancel' button with an 'X' icon are circled in red. Below the 'Title' field, there is a checked 'Active' checkbox and a large 'Description' text area. The 'Owner' section features a profile card for Christopher, which includes a photo, name, title 'Executive / Morristown', phone '(630)', and email 'chris@map'. This card is also circled in red. Below the owner information, there are four red bullet points, each labeled 'Required Field'. The form contains various dropdown menus and text fields: 'Category', 'Facility', 'Manufacturing Line', 'Customer Number', 'Product Number', 'Sales Order', 'Quantity', 'Internal Reference', 'Trigger', 'Department', 'Workcenter', 'Supplier Number', 'Order Number', 'Purchase Order', 'Unit of Measure', 'Value', and 'Currency'. The 'Category', 'Facility', 'Department', and 'Unit of Measure' dropdowns are highlighted with red boxes.

Note: Upon saving the event, the event will appear in the Search Events page along with events that originated from AuditPatrol and ComplaintPatrol.



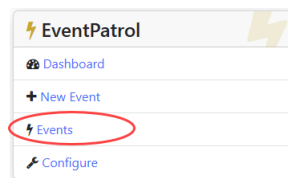
Chapter 5: Search Events

Users with the following permission can search for and view events.

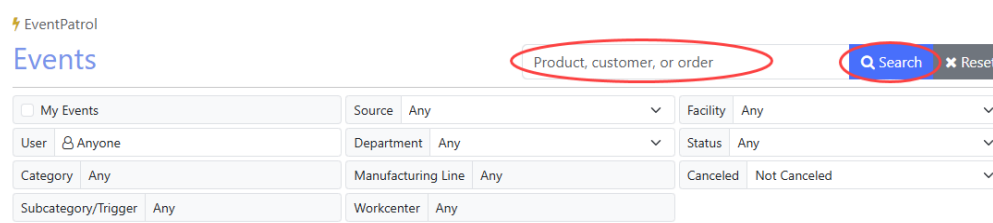
<input checked="" type="radio"/> Yes	View	Allows users to view all events.
--------------------------------------	------	----------------------------------

Event Search

23. Click on Events hyperlink in the EventPatrol card.



24. Enter a product, customer, or order number and click Search to locate an event.



Event Filters

25. Use the event filters to locate a desired event.

- My Events.** Check the checkbox to view events in which you have a role.
- Source.** Select the PatrolSuite app where the event originated.
- Facility.** Select a desired facility to view events only for the chosen facility.
- User.** Select a desired user to view only events in which the user has a role.
- Category and Subcategory/Trigger.** Select a desired category and subcategory/trigger to view events only for the chosen category and subcategory/trigger.

Note: A Source must be chosen before a category can be selected.

Note: A Category must be chosen before a subcategory/trigger can be selected.

- Department.** Select a desired department to view events only for the chosen department.



- g. **Manufacturing Line.** After first choosing a facility, select a desired manufacturing line to view events only for the chosen manufacturing line.
Note: A Facility must be chosen before a manufacturing line or workcenter can be selected.
- h. **Workcenter.** After first choosing a facility, select a desired workcenter to view events only for the chosen workcenter.
- i. **Status.** Select the desired event status.
- j. **Canceled.** Select the desired cancelation status.

Event Grid

- 26. Each event has two hyperlinks:
 - a. **The event number.** Click this hyperlink to open the event Tasks page.
 - b. **The source.** Click this hyperlink to open the event source page.

Event Next Due	Source Value	Category Subcategory/Trigger	Facility Department	Product Number / Product Name Customer Number / Customer Name
39 Definition 1/2 9/24/2023 [COT]	70 4. Has the Defect / P...	Manufacturing Line Press 6	CrestHill	
28 Approval 6/9 6/24/2023 [COT]	M - Insect Chicago Plant	Foreign Material Animal/Insect	CrestHill Manufacturing	0700430 - 12" TN... 0070020504 - AC...
17 Definition 0/1 10/2/2023 [COT]	Complaint 135 (R\$997,764.00) BRL	Delivery Late	CrestHill Manufacturing	15898 - WM16TN... 0070020504 - AC...

Note: The icons indicate the source of the event. The lightning bolt indicates an event that originated from EventPatrol.

Download

- 27. To download the EventPatrol data in the search grid, click on the dropdown menu arrow on the right side of the Download button.
- 28. Choose the desired CSV format for the data, click on the Excel Spreadsheet menu choice to view the data in a spreadsheet.



EventPatrol

Search Events

Product, customer, or order

My Events Source: Any Facility: CrestHill

► Additional Filters

Event	Source	Category	
Next Due	Value	Subcategory/Trig	
⚡ 39	Definition	1/2	70 4. Has the Defect / P...
9/24/2023			Manufacturing Li Press 6

▼

- Comma-Separated Values (.csv) - 1,000.00
- Comma-Separated Values (.csv) - 1,000.00
- Excel Spreadsheet (.xlsx)
- User Settings - Downloads

29. Click on “User Settings – Downloads” to manage your preferences related to all downloads in PatrolSuite. On the User Profile page, click on the Downloads dropdown and choose the desired action when the left side of the Downloads button is clicked.

Notifications Information Security Settings AuditPatrol

Language
Use browser language ▼

Theme
Use browser preferences ▼

Time Zone
 Use my computer's local time zone
 Use Coordinated Universal Time (UTC)
 Use specified time zone
 America/Chicago ▼

Navigation Bar
Dark ▼

Downloads
 Select File Type ▼
 Select File Type
 Comma-Separated Values (.csv) - 1,000.00
 Comma-Separated Values (.csv) - 1,000.00
 Excel Spreadsheet (.xlsx)

The image below shows the download data columns.

	A	B	C	D	E	F	G	H	I	J	K	L
1	EventId	Due	ItemType	EventValue	CategoryName	SubCategoryName	FacilityName	Department	ProductNumber	ProductName	CustomerNumber	CustomerName
2	39	9/25/2023 0:00	Audit		Manufacturing Line	Press 6	CrestHill					
3	28	6/25/2023 0:00	Event	7150	Foreign Material	Animal/Insect	CrestHill	Manufacturing	700430	12" TNB WIP CRUST	70020504	ACME Corporation
4	17	10/3/2023 0:00	Complaint	-997764	Delivery	Late	CrestHill	Manufacturing	15898	WM16TNBSUPP26/50.5Z	70020504	ACME Corporation



Chapter 6: Event Overview

Users with the following permission can search for and view events.

Yes	View	Allows users to view all events.
------------	-------------	----------------------------------

Event Header

30. On the Search Events page, click on the event number an event that originated from EventPatrol to open the event's Tasks & Action page.

Event Next Due	Source Value	Category Subcategory/Trigger	Facility Department	Product Number / Product Name Customer Number / Customer Name
70 Approval 272 1/20/2024 CST	JDB Nonconforming pro... \$7,400.00 USD	Product Weight Too Low	JD Busch Manufacturing	

The event header is opened. It is organized as follows:

- A. Event number
- B. Action button. Click on this button to reveal a submenu that enables a user to:
 - i Change the Event Owner.
 - ii Reopen Tasks. This enables the Event Owner to continue assigning tasks to Task Leaders.
 - iii Cancel the event.
- C. Event Status
- D. Event Owner ID
- E. Event Title
- F. Event Meta data
- G. Event Category and Subcategory/Trigger
- H. Event Description

The screenshot shows the Event Header for 'Event 70'. At the top right, it identifies the 'Event Owner' as Chris Lloyd. Below this is a progress bar with four stages: Definition (with a pencil icon), Approval (with a question mark icon), Implementation (with a play icon), and Closed (with a checkmark icon). The main content area is divided into two columns. The left column contains event details: 'JDB Nonconforming product 703335', 'Facility: JD Busch', 'Department: Manufacturing', 'Customer: 12345', 'Product: 703335 - Cheesecake NY Strawberry', 'Shelf Life: 45 days', 'Quantity: 1500 Cases (Cs)', and 'Cost: \$7,400.00 USD'. The right column contains 'Category: Product Weight' and 'Trigger: Too Low'. A description box at the bottom right states: 'See file 88371-1 KLD. This is the NY Strawberry Cheesecake.'



Event Body

The event body is organized as follows:

- I. The information tabs.
 - i **Tasks & Actions.** Enables the Tasks and Tasks with Actions to be managed.
 - ii **Timeline.** Provides a breakdown of how long each event activity took to complete.
 - iii **Files.** Enables files related to the event to be uploaded and viewed.
 - iv **NEW 8D Report.** Displays the event information in a structured format based on the “Eight Disciplines” problem solving methodology. This report is commonly used as the formal response to a customer complaint.
 - v **NEW Event Summary.** Enables a written summary of the entire event to be created and viewed.
 - vi **NEW Management Review.** Displays the event information and summary statistics in a format designed to facilitate Management Review. The intended audience of this report is supervisors and managers who need more information than is provided in the 8D Report.
- J. The Tasks that can be assigned and completed. Typically, the Tasks are completed to inform the Event Owner before the Event Owner decides which Tasks with Actions to assign.
- K. The Tasks with Actions that can be proposed and completed.
- L. Task with Action Name. Click on the name to open the task.
- M. For those Tasks with Actions that have been assigned to a task leader, the actions are displayed here, each with a status summary.
- N. The approval routes that can be chosen and completed.

Tasks & Actions | Timeline | Files | 8D Report | Event Summary | Management Review

Tasks **J**

All tasks for this event have been assigned 2024-08-13 CDT

Investigation ? **Complete**
Chris Lloyd Wednesday, April 29th 2026 CDT

Root Cause Analysis ? **Complete**
Chris Lloyd Tuesday, September 3rd 2024 CDT

Risk Assessment ? **Complete**
Mark Takaki Wednesday, April 29th 2026 CDT

Approval **N**
[+ Select Approval Route](#)

Tasks with Actions **K**

Containment ? **L** **All Actions Assigned**
John Wick Wednesday, January 15th 2025 CST

1/3 Actions Complete **M**

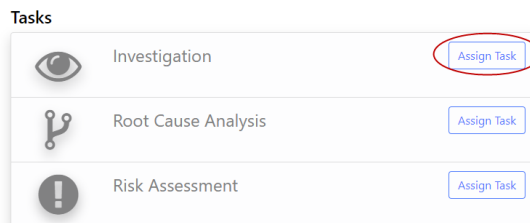
Action 10219	John Telford	Overdue 2025-01-20 <small>CST</small>
Action 10222	Craig Leide	Complete 2025-04-10 <small>CDT</small>
Action 10235	Gary Lail	Overdue 2025-02-13 <small>CST</small>



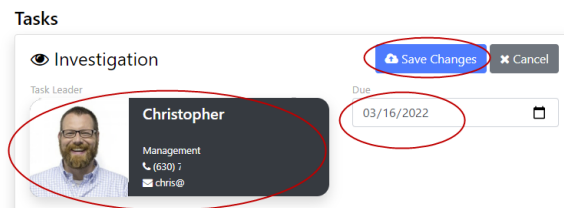
Chapter 7: Tasks - Investigation

Investigation Task Assignment

31. To assign the investigation task to a Task Leader who is responsible for performing the investigation, click on the 'Assign Task' button.



- a. The task leader will default to yourself. To pick a different task leader, click anywhere on the task leader card and choose a different user. Assign a due date (the default due date is in ten days) and click the 'Save Changes' button.



Note: The task leader will receive a task notice advising him/her of the need to complete the task.

32. Each task displays the name of the Task Leader and the due date. To open the task, click on the task name. To edit the task, click on the ellipses and choose Edit from the submenu.



33. To view the investigation information, click on the Investigation task.



The investigation is organized into four activities:

- a. Problem Analysis



- b. Problem Statement
- c. Recommendations
- d. Investigation Summary

Note: Parts or all of these activities may be “required” depending on configuration settings. Nonetheless, it is up to the discretion of the investigator to use these tools appropriately based on the circumstances of the event.

Note: The problem statement appears in the 8D Report and Management Review.


Note: The Investigation Summary appears in the Management Review.

Note: Management may be asked to review and approve the results of the investigation before actions are defined and implemented.

Problem Analysis

The purpose of the problem analysis step is to document the information that is subsequently used to create the problem statement.


NEW Note: A good investigator will spend more time answering these questions and very little time writing the problem statement because PatrolBot artificial intelligence will use these answers to write the problem statement for the investigator.

- 34. To document the results of the problem analysis, click on the ‘Edit’ button.
 - a. Document the Who, What, When, Where, Which, Why, How, How Many, and How Often. Click on the help icon  for additional information regarding each section.
 - b. Click the ‘Save Changes’ button.



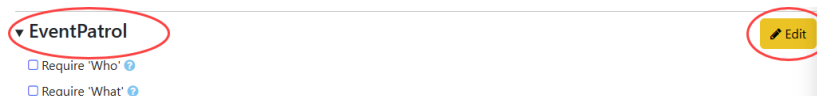
35. To manage what problem analysis information is required, click on the Admin/Configuration hyperlink.



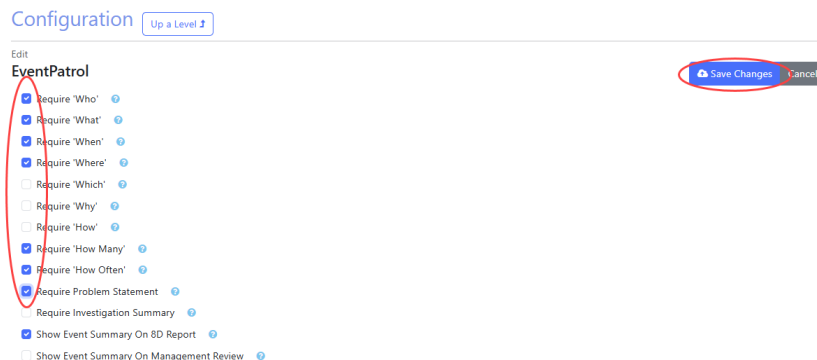
 To manage EventPatrol configuration settings, users must be in a role that grants the following permission:

EventPatrol		
<input type="radio"/> No	Add Action	Allows users to re-open a closed action task, to add new actions, and to close an action task.
<input checked="" type="radio"/> Yes	Admin	Allows users to edit the configuration settings and all events, including changing the event owner
<input type="radio"/> No	Create	Allows users to create events that originate from EventPatrol.
<input type="radio"/> No	Dashboard	Allows users to view the EventPatrol dashboard.
<input type="radio"/> No	View	Allows users to view all events.

a. Click on the EventPatrol text to expand the menu items and click on the 'Edit' button.



b. Select the information that will be required for every problem analysis and click the 'Save Changes' button.



NEW Internal Problem Statement

The intended audience of the internal problem statement is limited to company employees only. Accordingly, the internal problem statement may contain information or references that otherwise would not be shared with customers or other third parties.

36. To draft the internal problem statement, click on the "Problem Statement" tab and then click the 'Edit' button.



Investigation Task Leader: Chris Lloyd

*Required fields have not been completed

Problem Analysis **Problem Statement** Recommendations Investigation Summary

History **Edit**

- a. Answer the questions regarding procedures and document the procedure numbers as applicable.

Internal Problem Statement

When all procedures are followed, the system should be able to identify the problem.

There are two options for writing the Internal Problem Statement:

- b. **Write with Keyboard.** Click into the problem statement cell and use your keyboard to type the statement and click the 'Save Changes' button.

Problem Analysis Problem Statement Recommendations Investigation Summary

Save Changes Cancel

Did this problem result from a violation of procedures?
 Yes No Not Applicable

Procedure Numbers

Were all people involved trained on the procedures?
 Yes No Not Applicable

Internal Problem Statement Write with PatrolBot

A total of 1,500 cases of product 70125, Cheesecake NY Strawberry, produced on Line 3 at JDB manufacturing facility, were identified as being below weight.

- c. **Write with PatrolBot.** Click on the 'Write with PatrolBot' button and let artificial intelligence write the statement.

Note: PatrolBot will not be able to draft a good problem statement unless the questions on the Problem Analysis tab are answered with sufficient detail.

Internal Problem Statement Write with PatrolBot

125 cases were below weight in line 3.

Note: If a problem statement already exists, then both the Original Text and the suggested AI Generated Text will be presented side by side.



- i. To accept the AI Generated problem statement, click on the 'Save Changes' button.
- ii. To retain the Original Text (and disregard the AI Generated problem statement), click on the 'Cancel' button.

37. To translate the problem statement into required languages, click on the localization icon.

- a. Click the 'Edit' button.

- b. Enter the localized text and click the 'Save Changes' button.

NEW External Problem Statement

The intended audience of the external problem statement includes customers or other external parties.



Accordingly, the external problem statement is cleansed so that it does not contain information or references that are not appropriate to be shared with customers or other external parties.

Note: The external problem statement appears on the Complaint 8D Report which is typically provided to customers in response to a customer complaint.

38. To draft the external problem statement, click on the “Problem Statement” tab and then click the ‘Edit’ button.

The screenshot shows the 'Investigation' page with tabs for 'Problem Analysis', 'Problem Statement', 'Recommendations', and 'Investigation Summary'. The 'Problem Statement' tab is selected and circled in red. In the top right corner, there is a 'Task Leader' field with the name 'Chris Lloyd' and a red asterisk indicating that required fields have not been completed. Below the tabs, there is a 'History' button and an 'Edit' button, which is circled in red.

a. Answer the questions regarding procedures and document the procedure numbers as applicable.

The screenshot shows a form with two questions: 'Did this problem result from a violation of procedures?' and 'Were all people involved trained on the procedures?'. The 'Procedure Numbers' field is circled in red. The first question has radio buttons for 'Yes', 'No', and 'Not Applicable', with 'No' selected. The second question has radio buttons for 'Yes', 'No', and 'Not Applicable', with 'Not Applicable' selected.

There are four options for writing the External Problem Statement:

b. **Use the Internal Problem Statement.** Check the “Use Internal Problem Statement” checkbox and click the ‘Save Changes’ button. This will place an exact copy of the internal statement into the external problem statement cell, which will not be editable. If the internal problem statement changes, then the external problem statement will be automatically updated to match the internal statement.

The screenshot shows the 'External Problem Statement' form with a 'Write with PatrolBot' button and a 'Use Internal Problem Statement' checkbox. The checkbox is checked and circled in red. The text in the form reads: '125 cases were below weight in line 3.'

c. **Start from the Internal Problem Statement and then edit it.** Click the ‘Copy/Paste Internal Problem Statement’ button. This will place an exact copy of the internal statement into the external problem statement cell, which can be edited as desired (e.g. to remove confidential or sensitive information). Click the ‘Save Changes’ button.

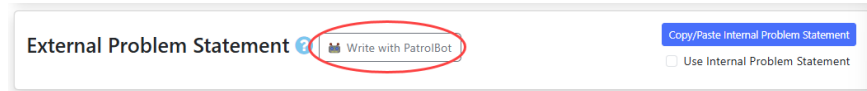
The screenshot shows the 'External Problem Statement' form with a 'Write with PatrolBot' button and a 'Copy/Paste Internal Problem Statement' button. The 'Copy/Paste Internal Problem Statement' button is circled in red. The 'Use Internal Problem Statement' checkbox is unchecked.

d. **Write with Keyboard.** Click into the problem statement cell and use your keyboard to type the statement and click the ‘Save Changes’ button.

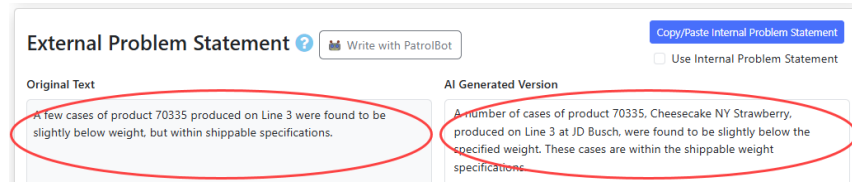
The screenshot shows the 'External Problem Statement' form with a 'Write with PatrolBot' button and a 'Copy/Paste Internal Problem Statement' button. The text in the form is circled in red: 'A few cases of product 70335 produced on Line 3 were found to be slightly below weight, but within shippable specifications.'

e. **Write with PatrolBot.** Click on the ‘Write with PatrolBot’ button and let artificial intelligence write the statement.

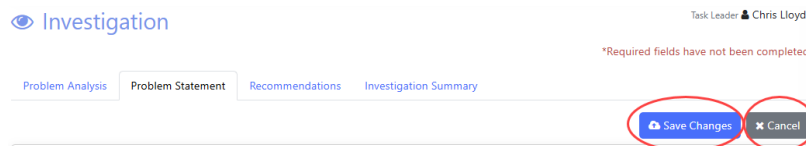
Note: PatrolBot will not be able to draft a good problem statement unless the questions on the Problem Analysis tab are answered with sufficient detail.



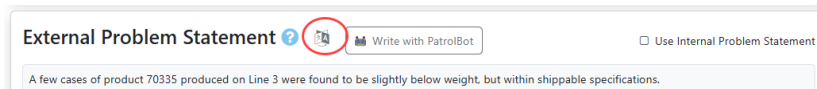
Note: If a problem statement already exists, then both the Original Text and the suggested AI Generated Text will be presented side by side.



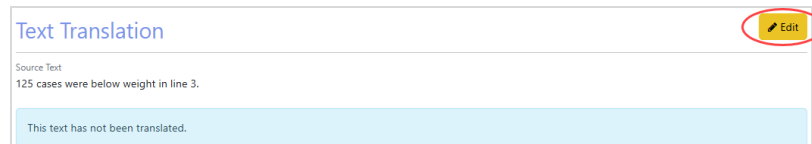
- i. To accept the AI Generated problem statement, click on the 'Save Changes' button.
- ii. To retain the Original Text (and disregard the AI Generated problem statement), click on the 'Cancel' button.



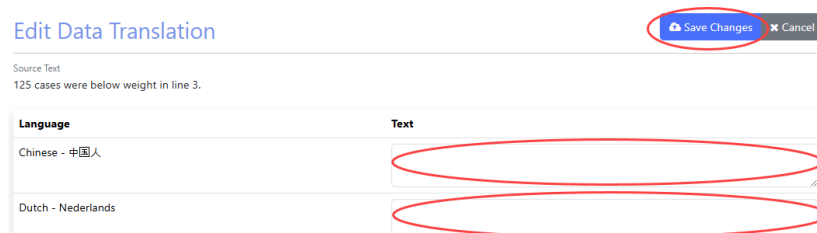
39. To translate the problem statement into required languages, click on the localization icon.



- a. Click the 'Edit' button.



- b. Enter the localized text and click the 'Save Changes' button.



Recommendations

40. The purpose of the Recommendations tab is to enable the Investigator to communicate to the Event Owner his/her recommendations regarding what to do next. On the Recommendations tab, click on the



'Edit' button and:

- Record recommendations for containment and correction action.
- Record recommendations for corrective and preventive action.
- Record any additional recommendations including checking the appropriate checkbox reflecting additional actions that are recommended as a result of the investigation. These recommendations will be reviewed and considered by the Event Owner as he/she decides what actions to take.
- Click the Save Changes button.

Investigation

Task Leader John Telford

Click when the investigation is complete

Problem Analysis Problem Statement Recommendations Investigation Summary

Edit

Containment and Correction Recommendations

Was this problem already corrected at the time of the investigation?

Yes No Unknown

Corrective and Preventive Recommendations

See below.

Were prevention actions resulting from this incident already implemented at the time of this investigation?

Yes No Unknown

Prevention actions were previously implemented as a result of a previous similar incident.

Additional Recommendations

<input checked="" type="checkbox"/> Root Cause Analysis	<input checked="" type="checkbox"/> Preventive Actions	<input type="checkbox"/> Health Hazard Analysis
<input checked="" type="checkbox"/> Risk Assessment	<input type="checkbox"/> Verification/Validation Actions	<input type="checkbox"/> Human Resources Review
<input checked="" type="checkbox"/> Containment Actions	<input type="checkbox"/> Close the event without further actions	<input type="checkbox"/> Procedure / Work Instruction Review
<input type="checkbox"/> Safety Actions	<input type="checkbox"/> Engineering / Manufacturing Review	<input type="checkbox"/> Product Design Review
<input type="checkbox"/> Correction Actions	<input type="checkbox"/> Environmental Impact Review	<input type="checkbox"/> Product Specifications Review
<input checked="" type="checkbox"/> Corrective Actions	<input type="checkbox"/> Financial Review	<input type="checkbox"/> Regulatory Review

Must implement on or before June 1, 2026.

NEW Investigation Summary

The intended audience of the investigation summary is limited to company employees only. Accordingly, the investigation summary may contain information or references that otherwise would not be shared with customers or other third parties.

Note: The investigation summary appears on the event's Management Review report.

- To draft a written summary of the investigation activities and findings, click on the Investigation Summary tab and click the 'Edit' button.

Investigation

Task Leader Chris Lloyd

*Required fields have not been completed

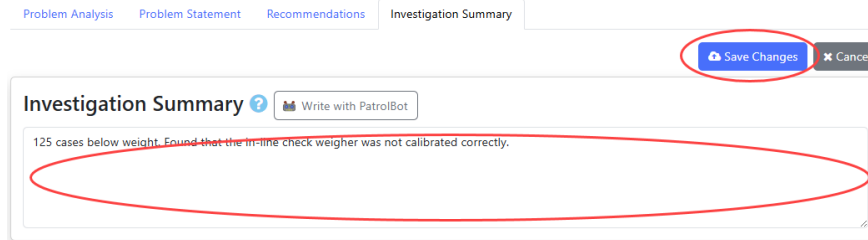
Problem Analysis Problem Statement Recommendations Investigation Summary

History Edit

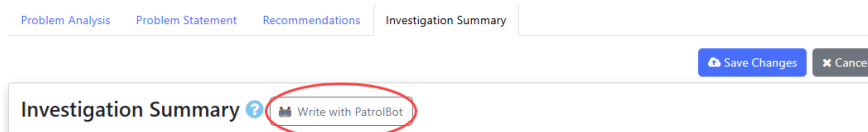


There are two options for writing the Investigation Summary:

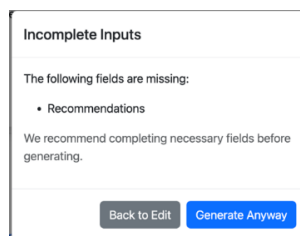
- a. **Write with Keyboard.** Click into the investigation summary cell and use your keyboard to type the summary. When finished, click the 'Save Changes' button.



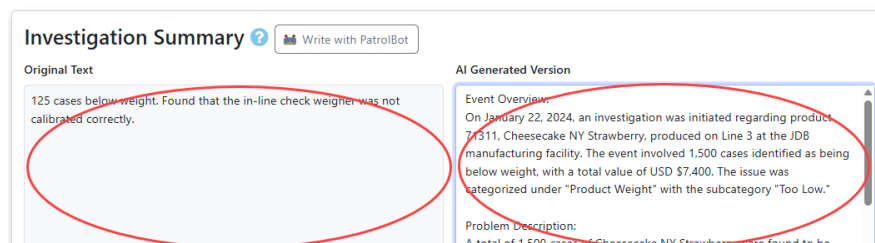
- b. **Write with PatrolBot.** Click on the 'Write with PatrolBot' button and let artificial intelligence write the summary.



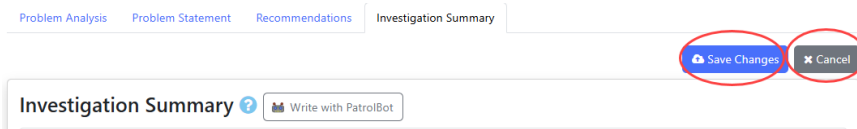
Note: The Problem Analysis, Problem Statement, and Recommendations tabs must be completed with sufficient information to enable PatrolBot to draft a good investigation summary. If these tabs are incomplete, then a warning will be given. Click the 'Back to Edit' button to document additional information before writing the investigation summary. Click the 'Generate Anyway' button to write the investigation summary despite the missing information.



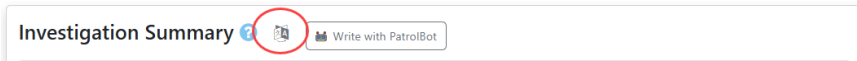
Note: If an investigation summary already exists, then both the Original Text and the suggested AI Generated Text will be presented side by side.



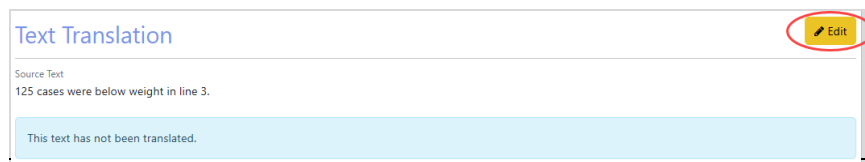
- i. To accept the AI Generated investigation summary, click on the 'Save Changes' button.
- ii. To retain the Original Text (and disregard the AI Generated investigation summary), click on the 'Cancel' button.



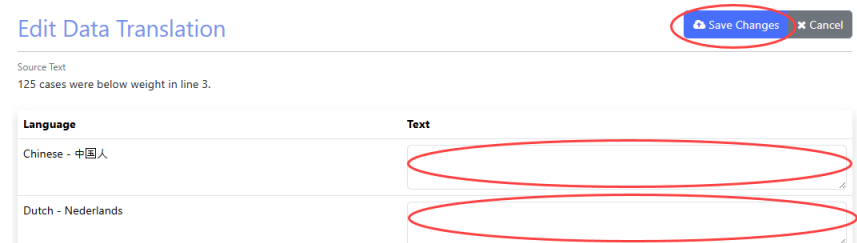
42. To translate the investigation summary into required languages, click on the localization icon.



a. Click the 'Edit' button.

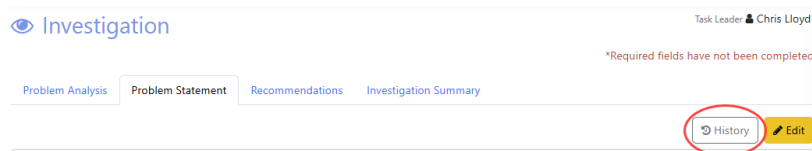


b. Enter the localized text and click the 'Save Changes' button.



NEW Investigation History

43. To view an audit trail of changes to the investigation tabs, click the 'History' button.



Note: The changes are sorted by date with the most recent changes at the top.



Aggregate History
Investigation 46 Item History Advanced

Investigation 46 Modified Chris Lloyd 29-April-2026 15:08 PM

Problem Statement Internal A total of 1,500 cases of product 70335, Cheesecake NY Strawberry, produced on Line 3 at IDB manufacturing facility, were identified as being below weight. The issue pertains to cases categorized under "Product Weight" with the subcategory "Too Low." The event was recorded on January 22, 2024, and involved cases that are within shippable specifications but still below the specified weight standards. The problem was documented as "Cases below weight" affecting the specified quantity and value of USD \$7,400. No procedures violations or training issues are indicated. The event details are documented in file 88371-1 KLD.
125 cases were below weight in line 3.

Investigation 46 Modified Chris Lloyd 29-April-2026 14:53 PM

Problem Statement External A few cases of product 70335 produced on Line 3 were found to be slightly below weight, but within shippable specifications.

Investigation 46 Modified Chris Lloyd 29-April-2026 14:49 PM

Use Problem Statement Internal False
True

Investigation 46 Modified Chris Lloyd 29-April-2026 14:11 PM

Use Problem Statement Internal True
False

Investigation 46 Created prior to audit trail 23-January-2024 10:26 AM

Investigation Id	46
Event Workflow Task	Workflow Task 3
Problem Statement Internal	125 cases were below weight in line 3.
Problem Statement External	NULL
Report Internal	125 cases below weight. Found that the in-line check weigher was not calibrated correctly.

Note: Older information such as problem statements can be retrieved by copying them from the history and pasting them back into the appropriate cell.

44. To view more detailed (and more technical) information, check the “Advanced” checkbox.

Aggregate History
Investigation 46 Item History Advanced

Complete the Investigation

45. Click on the “Click when the investigation is complete” button once the investigation has been completed and all information has been recorded.

Investigation Task Leader Christopher

Click when the investigation is complete

Problem Analysis Problem Statement Investigation Report Recommendations

Note: Once the task has been completed, it will appear on the event page with a green background.

Tasks

	Investigation Christopher	✓ Completed Sunday, March 6th 2022 (CST)
	Root Cause Analysis Christopher	○ Due Saturday, March 12th 2022 (CST)



Chapter 8: Tasks - Root Cause Analysis (RCA)

Contact your quality department for training and guidance on how to conduct root cause analysis. EventPatrol facilitates the two most popular approaches to root cause analysis:

5 Why's. This approach emphasis sequential thinking.

Fishbone diagram. This approach emphasizes categorical thinking.

Regardless of which approach you choose (e.g. 5 Why's), the information is displayed on the other approach's tab (e.g. Fishbone).

Assign and Open the RCA Task

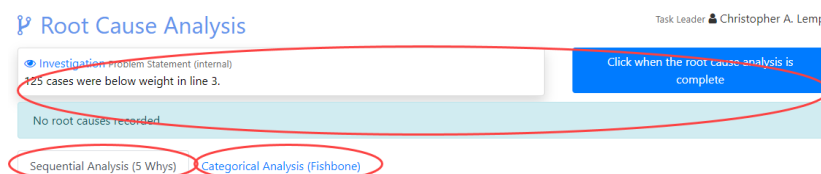
46. Follow the instructions in the preceding chapter to assign this task to a Task Leader and to open the task.

RCA Page Overview

The RCA page is organized into two areas.

The summary information displays the problem statement and the chosen root causes. Additionally, the completion status of the task is managed here.

The RCA tabs (5 Whys and Fishbone).



5 Whys

47. Click on the “Sequential Analysis (5 Whys)” tab.



48. Click the Add Why button.

The screenshot shows the top navigation bar with two tabs: 'Sequential Analysis (5 Whys)' and 'Categorical Analysis (Fishbone)'. Below the tabs is a green button with a plus sign and the text '+ Add Why', which is circled in red.

49. Document the Why. Optionally, document the rank (represents the likeliness of being the root cause), observable symptoms, comments, category, department (where the cause originated), and workcenter (where the cause originated).

50. If the Why is a root cause, check the Root Cause checkbox.

51. Click Save Changes. This will create the first “branch” (A) and the first Why (1).

The screenshot shows the 'Add Why' form with the following fields filled out: 'Why' is 'The wrong cartons were used', 'Rank' is '6', 'Observable Symptoms' is 'cartons seemed to hold more liquid', 'Category' is 'Materials', 'Department' is 'Manufacturing', and 'Workcenter' is 'ARL_Gallons'. The 'Root Cause' checkbox is unchecked. The 'Save Changes' button is circled in red. Below the form is a green '+ Add Branch' button.

52. To add a sequential why underneath Why 1, click on the branch/why code (A1). Then click on '+ Add Why' in the submenu.

The screenshot shows the 'Add Why' form with the 'Why 1' entry. A submenu is open over the 'A1' code, showing options: 'Edit', '+ Add Why' (circled in red), 'Move', and 'Delete'. Below the form is a green '+ Add Branch' button.

53. Document the Why. Optionally, document the rank (represents the likeliness of being the root cause), observable symptoms, comments, category, department (where the cause originated), and workcenter (where the cause originated). If the Why is a root cause, check the Root Cause checkbox.

The screenshot shows the 'Add Why' form with a new entry added below the first one. The new entry has 'Why' as 'Replacement cartons were used', 'Rank' as '6', and 'Observable Symptoms' as 'wrong SKU'. The 'Save Changes' button is circled in red. Below the form is a green '+ Add Branch' button.



54. Click Save Changes. This will create the next Why (#2) in branch A. Note that the Why can be moved up or down, or to a different branch, by clicking on the Why code and selecting the Move option from the menu.

55. To start a new branch, click the Add Branch button.

56. Document the Why. Optionally, document the rank (represents the likeliness of being the root cause), observable symptoms, comments, category, department, and workcenter. If the Why is a root cause, check the Root Cause checkbox.

57. Click Save Changes. This will create the first Why in Branch B.

58. Repeat the preceding steps in this section until all the Whys are documented in their appropriate branch.



Fishbone Diagram

59. Click on the “Categorical Analysis (Fishbone)” tab. The information entered in the preceding section will be displayed as organized by category (Environment, Equipment, Measurement/Measurement Systems, Materials, People/Training, Paperwork/Procedures/Process).

60. To add a cause, click the Add Cause button in the appropriate category. Provide the requested information, check the Root Cause checkbox if appropriate, and click Save Changes.

61. The new cause will appear.

62. Repeat the preceding steps in this section until all the causes are documented in their appropriate



category.

5 Whys – Moving Causes/Whys

63. Click on the “Sequential Analysis (5 Whys)” tab. Note that the cause added in the preceding section via the Fishbone process appears as a new branch. This is because the Fishbone approach is only concerned with categories, not sequences.

The screenshot shows the 'Sequential Analysis (5 Whys)' interface. It has two tabs: 'Sequential Analysis (5 Whys)' and 'Categorical Analysis (Fishbone)'. Below the tabs are three branches:

- Branch A:**
 - Why 1:** The wrong cartons were used. Rank 6. Symptoms: Cartons were not filled to the top with liquid. Department: Manufacturing, Workcenter: ARL_Gallons. Date: 1/23/2024. User: Nobody.
 - Why 2:** We were out of stock of the normal cartons. Rank 6. Symptoms: Wrong SKU; no stock in the warehouse. Department: Manufacturing, Workcenter: ARL_Gallons. Date: 1/23/2024. User: Nobody.
- Branch B:**
 - Why 1:** In-line check weigher out of calibration. Rank 10. Symptoms: The 10 pound standard measured 9.6 pounds. Department: Maintenance, Workcenter: ARL_Gallons. Date: 1/23/2024. User: Nobody.
- Branch C:**
 - Why 1:** The wrong procedure was used to calibrate the check weigher. Rank 10. Symptoms: Investigation evidence. Comments: The operator mistakenly used SOP 178854. Department: Maintenance, Workcenter: ARL_Gallons. Date: 1/23/2024. User: Nobody.

64. The cause added via Fishbone should be Why B2. To move it there, click the Why code and select Move from the submenu.

The screenshot shows the 'Why 1' entry in Branch C. A context menu is open over the 'C1' code, with the following options: Edit, Add Why, Move, and Delete. The 'Move' option is circled in red.

65. Choose the desired new parent, which in this case is B1.

The screenshot shows the 'Move Root Cause' dialog box. It has a 'Parent Cause' dropdown menu. The menu is open, showing the following options: None, A, 1 - The wrong cartons were used, 2 - We were out of stock of the normal cartons, and B, 1 - In-line check weigher out of calibration. The last option is circled in red.

66. Click the Move button. Now the Cause/Why appears in its proper sequential position.



Sequential Analysis (5 Whys) [Categorical Analysis \(Fishbone\)](#)

Branch A

Why 1 The wrong cartons were used A1 ⌵

Rank	Symptoms	Comments
6	Cartons were not filled to the top with liquid	

Department: Manufacturing Workcenter: ARL_Gallons 1/23/2024 CST Nobody

Why 2 We were out of stock of the normal cartons A2 ⌵

Rank	Symptoms	Comments
6	Wrong SKU; no stock in the warehouse	

Department: Manufacturing Workcenter: ARL_Gallons 1/23/2024 CST Nobody

Branch B

Why 1 In-line check weigher out of calibration B1 ⌵

Rank	Symptoms	Comments
10	The 10 pound standard measured 9.6 pounds	

Department: Maintenance Workcenter: ARL_Gallons 1/23/2024 CST Nobody

Why 2 The wrong procedure was used to calibrate the check weigher B2 ⌵

Rank	Symptoms	Comments
10	Investigation evidence	The operator mistakenly used SOP 178854.

Department: Maintenance Workcenter: ARL_Gallons 1/23/2024 CST Nobody

Completing & Reopening the RCA Task

67. When the RCA task has been completed, click the “Click when the root cause analysis is complete” button.

Root Cause Analysis Task Leader: Christopher

Investigation Problem Statement (internal)
 125 cases were below weight in line 3.

Click when the root cause analysis is complete

Root Causes

Equipment: **In-line check weigher out of** | People / Training: **The wrong procedure was used to**

68. Click the Complete button in the confirmation window.

69. To reopen the RCA task, click the reopen icon.

Root Cause Analysis Task Leader: Christopher

Investigation Problem Statement (internal)
 125 cases were below weight in line 3.

Root Cause Analysis completed
 1/23/2024 3:08 PM **Reopen**



Chapter 9: Tasks - Risk Assessment

Contact your quality department for training and guidance on how to conduct a risk assessment. Use the EventPatrol risk assessment page to record the results.

Note: Failing to understand the risks (by completing a risk assessment) before defining and implementing corrective actions is one of the most common indicators of a neglected or immature and quality culture. A risk assessment should *always* be completed *before* defining and implementing corrective actions.

Assign the Risk Assessment Task

70. Follow the instructions in the preceding chapters to assign this task to a Task Leader.

Perform the Risk Assessment and Record the Results

71. Click on the task name to open the task. Click on the Edit button to record the results.

Risk Assessment Task Leader Christopher

Severity
None
Comments

Frequency
None
Comments

Occurrence Data
A defect occurrence has not been entered

Detectability
None
Comments

Edit

72. Select the applicable Severity from the dropdown list. Add comments if necessary.

73. Select the applicable Frequency from the dropdown list and record how often this event has happened in the past. Add comments if necessary.

74. Select the applicable Detectability from the dropdown list. Add comments if necessary.

75. Click the Save Changes button.



Risk Assessment Task Leader Christopher

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

Severity
(Select the severity...)
Comments

Frequency
(Select the frequency...)
Comments

Occurrence Data
This problem occurred times in the past
(Select Defect Frequency)

Detectability
(Select the detectability...)
Comments

76. Evaluate the Risk Priority Number (RPN). This provides a numerical index based on the risk assessment to determine if the risk is low, medium, high, or unacceptable. The Event Owner will use this information when considering whether corrective actions are necessary. The RPN scale is as follows. Contact MAP if you would like the scale revised for your organization.

0-11 = Low. Continue to measure and monitor.

12-26 = Medium. Corrective action should be considered.

27-47 = High. Corrective action is recommended.

>48 = Unacceptable. Corrective action is required and preventive actions should be considered.

77. Click the Mark Task Complete once the risk assessment is finished and recorded.

Risk Assessment Task Leader Christopher A. Lemp

Risk Priority Number **48** [Mark Task as Complete](#) [Edit](#)

Unacceptable risk. Corrective action is required.



Chapter 10: Tasks with Actions -

Overview

Introduction

78. The following types of Tasks with Actions can be assigned:

- a. **Containment.** Actions taken to prevent the problem from getting worse. Due to the often urgent need to stop the problem or financial liability from getting worse, containment actions are often completed without waiting for large-group approval.
- b. **Safety.** Actions taken to address human, food, or product safety concerns. Due to the often urgent need to address safety problems, safety actions are often completed without waiting for large-group approval.
- c. **Correction.** “Correction actions eliminate a detected nonconformity. For example, rework or regrading a product is a correction action.” Source: FDA.gov CDRH & ISO 9000:2005(E). There is an important difference between correction and corrective actions.
- d. **Corrective.** “Action to eliminate the cause of a detected non-conformity or other undesirable situation. Corrective action is taken to prevent recurrence.” Source: FDA.gov CDRH & ISO 9000:2005(E). Corrective action is a reactive activity that is **preceded by Root Cause Analysis**.
- e. **Preventive.** “Action to eliminate the cause of a potential non-conformity or other undesirable situation. Preventive action is taken to prevent recurrence.” Source: FDA.gov CDRH & ISO 9000:2005(E). Preventive action is a proactive activity that is **preceded by Risk Assessment** to identify, assess, and control potential hazards.
- f. **Verification/Validation.** Actions taken to ensure that the corrective and preventive actions are effective and do not adversely affect the finished product. Often called “Follow-up” actions.

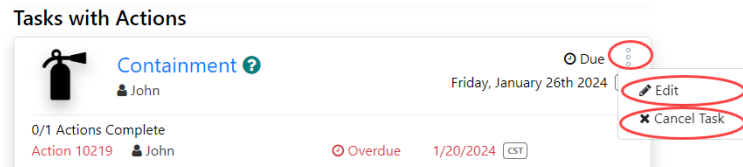
Assign the remaining Tasks to a Task Leader

79. The Event Owner must follow the instructions in the preceding chapters to assign any remaining desired Tasks, including Tasks with Actions, to a Task Leader.



Editing Existing Task Assignments

80. Click on the ellipses and click on Edit to change the Task Leader or the due date.
 - a. Click on Cancel Task to un-assign the task.

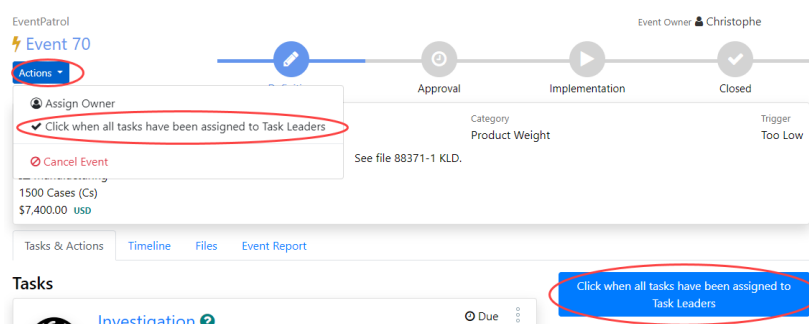


All Tasks Assigned

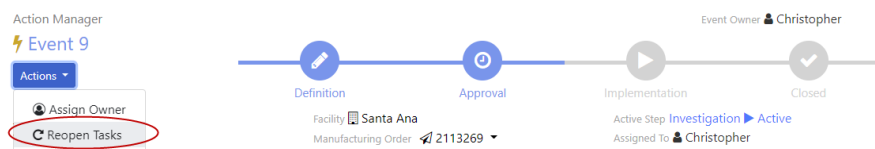
The Event Owner must indicate when all desired tasks have been assigned to a Task Leader. **The approval process cannot start until all tasks are marked as being assigned.**

81. Click on the Actions button in the event header. Click on the All Tasks Assigned menu option.

Alternatively, the Event Owner can click on the "Click when all tasks and



82. To reopen task assignment, click on the Reopen Tasks menu option.





Chapter 11: Tasks with Actions - Defining & Assigning Actions

Contact your quality department for training and guidance on how to determine the actions to take as a result of the investigation, root cause analysis, and risk assessment.

This chapter applies to all Tasks with Actions, as the management of each action is identical.

Defining and Assigning New Actions

83. To create a new action, click the New Action button.



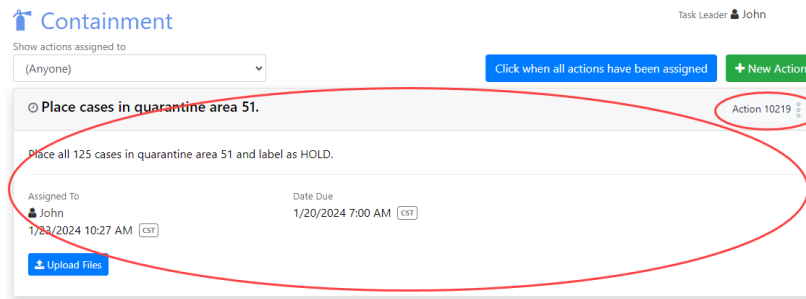
84. Actions can be completed immediately or after approval. Click “No Approval Required” for actions that need to be completed immediately without approval. Click “Approval Required” for actions that should be approved before being completed.



85. Enter the action title, instructions, and due date. Choose the user to whom the action is assigned (the “action responsible person” or “ARP”). Click the Save Changes button.



The new action will appear in the action list. Each action is given a unique Action Number for reference.

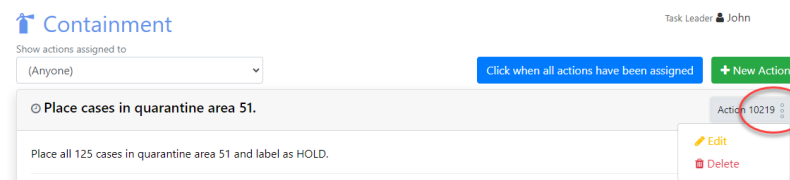


86. To filter the action list by user, choose the desired user from the “Show Actions assigned to” dropdown.



Editing Existing Actions

87. To edit or delete an action, click on the ellipses, then click Edit or Delete from the dropdown menu.



Viewing Actions

The action page is color-coded to help identify the actions assigned to the user viewing the page. Each action has a colored bar on the left of the card with the following meanings:

- No Color** The action is not assigned to you.
- Yellow** The action is assigned to you, but it cannot be started until it is approved.
- Blue** The action is assigned to you, and it can be started immediately (no approval necessary).
- Green** The action is assigned to you, and it has been completed successfully.
- Red** The action is assigned to you, and it has been completed unsuccessfully.

88. Click the Show actions assigned to filter and select the desired ARP to view actions for the selected user.



Correction Task Leader John

Show actions assigned to: (Anyone) All action assignments completed 2022-03-10 2:01 AM + New Action

⚠ This is what an action awaiting approval looks like when viewed by the ARP Action 24

Comments here

Assigned To: Christopher 2022-03-10 2:23 PM Date Due: 2022-03-10 5:00 PM

▶ This is what an action that can be completed looks like when viewed by the ARP Action 25

Comments here

Assigned To: Christopher 2022-03-10 2:23 PM Date Due: 2022-03-09 8:00 AM Close Action

✓ This is what an action that has been successfully completed looks like when viewed by the ARP Action 26

Comments here

Assigned To: Christopher 2022-03-10 2:23 PM Date Due: 2022-12-03 10:00 AM Closed By: John 2022-03-10 1:26 AM

✘ This is what an action that was not able to be completed looks like when viewed by the ARP Action 27

Comments here

Comment by John Telford: Just couldn't be done

Assigned To: Christopher 2022-03-10 2:24 PM Date Due: 2022-12-03 10:00 AM Closed By: John 2022-03-10 1:28 AM

This is what an action that has been assigned to someone else looks like Action 28

Comments here

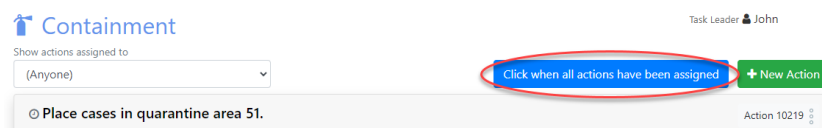
Assigned To: Donny 2022-03-10 2:29 PM Date Due: Close Action



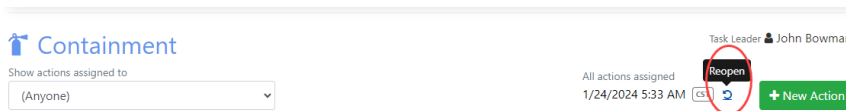
All Actions Assigned

The Task Leader must indicate when all desired actions have been assigned to action responsible persons (ARPs). **Event approval cannot start until all Task Leaders have indicated that all actions requiring approval have been assigned.** If, after approval, a Task Leader adds a new action that requires approval, then a new approval route will be required before the new action can be completed.

89. Once the Task Leader has finished defining and assigning actions, click on the “Click when all actions have been assigned” button.



90. To reopen a completed task, click on the Reopen icon.



91. After all actions have been assigned, the Task Leader can add a new action without first reopening the task. Click on the New Action button, click No Approval Required, provide the title, instructions, ARP, due date, and click Save Changes. This will add the new action and the task will automatically be reopened.





Chapter 12: Tasks with Actions -

Approval

If all desired tasks have been assigned to task leaders, and all the task leaders indicated that they are done assigning actions, then the Event Owner can start the approval route.

Selecting the Approval Route

92. Click on the Select Approval Route button.

The screenshot shows the 'Action Manager' interface for 'Event 9'. A progress bar at the top indicates the current step is 'Approval', with 'Definition' and 'Implementation' completed and 'Closed' pending. Below the progress bar, the 'Tasks' section shows an 'Investigation' task by Christopher, which is 'Completed' on Tuesday, March 8th, 2022. A red circle highlights the 'Approval' step in the progress bar, and another red circle highlights the '+ Select Approval Route' button in the 'Approval' task card.

93. Choose the desired approval route and click the Create button.

The 'New Approval Attempt' dialog box is shown. It has a green header with a close button. Below the header, there is a dropdown menu for 'Approval Route' with 'Quality Approval' selected. At the bottom right, there are two buttons: '+ Create' and 'Cancel'. Both the dropdown menu and the '+ Create' button are circled in red.

Starting the Approval Route

94. To choose the people who will act as approvers in each role, click on the Approvers button.



Event Owner: Christopher

Complaint 125
Validity: Inconclusive

Facility: Santa Ana
Manufacturing Order: 2113269

Active Step: Investigation ▶ Active
Assigned To: Christopher

Tasks

- Investigation (Completed) - Christopher
- Root Cause Analysis
- Risk Assessment

Approval

Quality Approval (Not Started)

Quality Coord/Engineer - Plant	1
Nobody	
Quality Manager - Corporate	2
Nobody	

95. For the desired role, click on the assigned user badge, which will be “Nobody” if a user has not been previously chosen to act in a role.

Tasks

- Investigation (Completed) - Christopher
- Root Cause Analysis
- Risk Assessment

Approval

Quality Approval (Not Started)

Save Changes (circled in red) Cancel

Quality Coord/Engineer - Plant	1
Nobody	
Quality Manager - Corporate	2
Nobody	

96. Select the desired user from the Select a User search. Note that the selectable users will be limited to those people who have been added into the corresponding role via the Admin/Approval Roles page (see the PatrolSuite user guide for more information).

97. After an approver has been chosen for each role, click the Save Changes button.

Tasks

- Investigation (Completed) - Christopher
- Root Cause Analysis
- Risk Assessment

Approval

Quality Approval (Not Started)

Save Changes (circled in red) Cancel

Quality Coord/Engineer - Plant	1
John	
Quality Manager - Corporate	2
Christopher	

98. Click the Start button to start the approval route.

Tasks

- Investigation (Completed) - Christopher
- Root Cause Analysis
- Risk Assessment

Approval

Quality Approval (Not Started)

Approvers Start (circled in red)

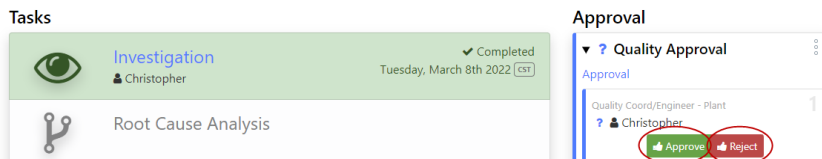
Quality Coord/Engineer - Plant	1
John	
Quality Manager - Corporate	2
Christopher	



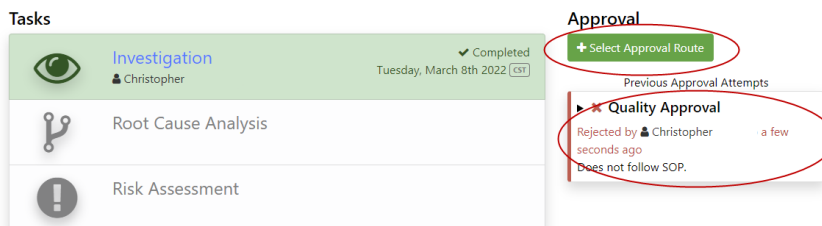
Approval or Rejection

Each user in the approval route will receive a task request when it is his/her time to approve.

99. Click Approve or Reject to reflect the decision of the user in the approval role. If Reject is selected, a reason for rejection is required.



100. Previous approval attempts will be displayed for reference. After making any necessary changes, another approval attempt can be started.





Chapter 13: Tasks with Actions - Implementation & Closure

Implementation Phase

101. Once the approval route is approved, the action event state will change to Implementation, and all ARPs assigned to complete an action will receive a task notice.

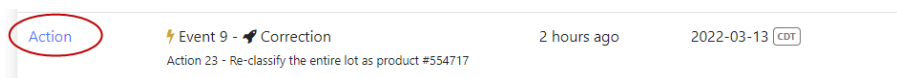


Action Completion by ARPs

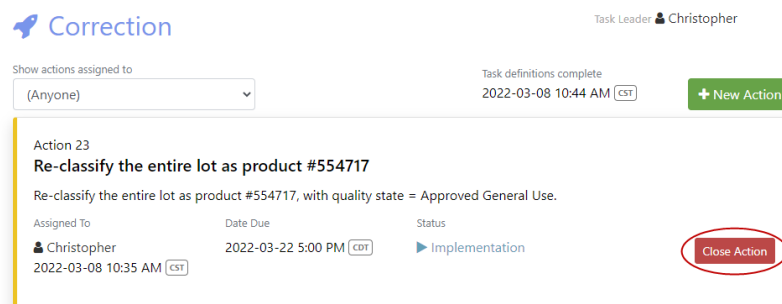
102. From the PatrolSuite homepage, click on My Tasks.



103. From the My Tasks page, click on the desired task.



104. Once the action is complete, click on the Close Action button.





105. Select the action outcome, add any comments, and click the Close Action button.

106. Once all actions are completed, the event state will automatically change to Closed.





NEW Chapter 14: Timeline

NEW View Event Timeline

107. To view the event timeline, click on the “Timeline” tab. The timeline provides a detailed accounting of the event tasks including the: task name, start date, due date, completion date, completion status, completed by, and duration.

Tasks & Actions Timeline Files 8D Report Event Summary Management Review					
Name	Started	Due	Completed	Completed By	Duration
Initiated			22-January-2024 08:06 AM <small>CST</small>	John Wick	
Containment	22-January-2024 08:06 AM <small>CST</small>	2024-01-26 <small>CST</small>	15-January-2025 15:12 PM <small>CST</small> <small>Late 354 days 21 hours</small>	Chris Lloyd	359 days 7 hours
Investigation	23-January-2024 10:24 AM <small>CST</small>	2024-02-01 <small>CST</small>	<small>Overdue 818 days 12 hours</small>		
Root Cause Analysis	23-January-2024 13:12 PM <small>CST</small>	2024-02-01 <small>CST</small>	03-September-2024 14:57 PM <small>CDT</small> <small>Late 214 days 19 hours</small>	John Wick	224 days
Risk Assessment	12-February-2024 12:11 PM <small>CST</small>	2024-02-21 <small>CST</small>	29-April-2026 12:11 PM <small>CDT</small> <small>Late 797 days 17 hours</small>	Chris Lloyd	806 days 22 hours
Safety	13-February-2024 09:19 AM <small>CST</small>	2024-02-17 <small>CST</small>	29-April-2026 12:10 PM <small>CDT</small> <small>Late 801 days 17 hours</small>	Chris Lloyd	806 days 1 hour
Corrective	31-January-2024 06:17 AM <small>CST</small>	2024-02-09 <small>CST</small>	15-January-2025 15:00 PM <small>CST</small> <small>Late 340 days 21 hours</small>	Chris Lloyd	350 days 8 hours
Preventive	31-January-2024 06:24 AM <small>CST</small>	2024-02-09 <small>CST</small>	29-April-2026 12:10 PM <small>CDT</small> <small>Late 809 days 17 hours</small>	Chris Lloyd	819 days 4 hours
				Total	4193 days 17 hours

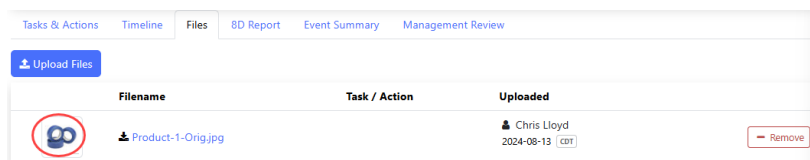


NEW Chapter 15: Files

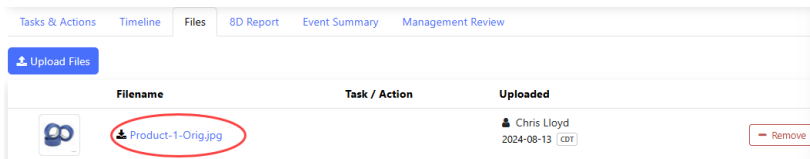
NEW View & Manage Event Files

The Files tab allows any user involved in the event to upload files related to the event. Additionally, users with permission to view the event will also be able to view the files.

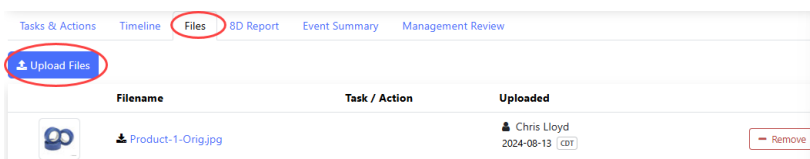
108. To view a file, click on the thumbnail.



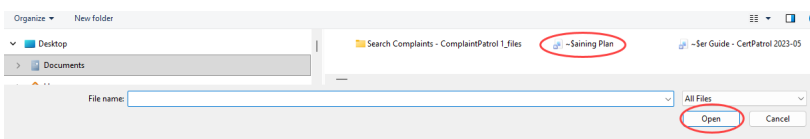
109. To download a file, click on the filename hyperlink.



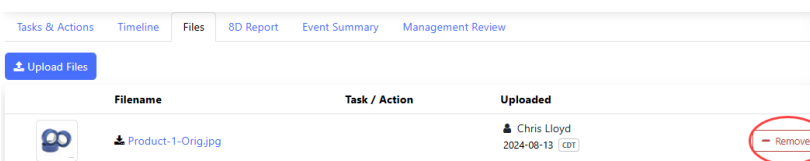
110. To upload a file related to the event, click on the “Files” tab and then click on the ‘Upload Files’ button.



a. Choose the file and click the ‘Open’ button.



111. To remove a file, click the ‘Remove’ button. Click on the ‘Delete’ button in the confirmation window.





NEW Chapter 16: 8D Report

NEW Introduction

The 8-Discipline approach is a structured, team-oriented problem-solving methodology used to identify, correct, and prevent the recurrence of quality issues. Originally developed by Ford Motor Company, this 8-step approach (D1-D8) is global standard in manufacturing for identifying root causes, implementing permanent corrective actions, and enhancing product quality. This report is based on the 8D structure and is often provided to customers in response to a customer complaint.

NEW View Report

112. To view the event's 8D Report, click on the "8D Report" tab.

8D Report

JD # 12005 Au Santa Fe

Event: 70

Customer Information

Number: 12345

Name: _____

Address: _____

Purchase Order Number: _____

Event Information

Date Created: 22-January-2024 08:06 AM (M)

Date Investigation Closed: _____

Category: Product Weight

Subcategory: Top Low

Facility: JD South

Department: Manufacturing

Product Number: 703335

Product Name: _____

Order Number: _____

Sales Order Number: _____

Team Members

Owner: Chris Lloyd

Task Loaders	Action Responsible Persons
Investigation: Chris Lloyd	Containment: Craig Leifer
Root Cause Analysis: Chris Lloyd	Containment: Gary Lall
Risk Assessment: Mark Tekali	Containment: John Telford
Containment: John Wick	Safety: Chris Lloyd
Safety: Gary Lall	Corrective: Craig Leifer
Corrective: Chris Lloyd	Corrective: Gary Lall
Preventive: Chris Lloyd	Corrective: John Telford
	Corrective: John Wick
	Preventive: Craig Leifer

Problem Statement

A few cases of product 70335 produced on Line 3 were found to be slightly below weight, but within shippable specifications.

Containment Actions

Action Date	Assigned To	Description
10219 2025-01-20	John Telford	Raise base in quarantine area S1.
10212 2025-02-01	Craig Leifer	Add unit numbers to SAP
10235 2025-02-13	Gary Lall	Update SOP

Root Causes

Category	Cause	Symptoms
Equipment	In-line check weigher out of calibration	The 10 pound standard measured 8.6 pounds
People / Training	The wrong procedure was used to calibrate the check weigher	Investigation evidence

Corrective Actions

Action Date	Assigned To	Description
10223 2025-01-10	John Telford	Update the on-floor SOP #22564
10225 2025-02-09	Craig Leifer	Increase the volume of the low weight alarm to level 7
10216 2025-02-09	John Wick	Change the calibration to monthly
10236 2025-02-13	Gary Lall	test

Preventive Actions

Action Date	Assigned To	Description
10224 2024-02-05	Craig Leifer	Re-train all Line 3 operators on SOP #22564

Verification/Validation Actions

No actions assigned



NEW Print Report

113. To print the 8D Report, right click on the report and select “Print,” select the desired printer, and click on the ‘Print’ button.

The screenshot displays the '8D Report' interface. On the left, there are sections for 'Customer Information' and 'Event Information'. A right-click context menu is open over the report, with the 'Print' option circled in red. To the right of the report, a print settings sidebar is visible, also with the 'Destination' dropdown menu circled in red, showing 'EPSON WF-4630 Serie'. The sidebar includes options for 'Pages', 'Copies', 'Layout', 'Color', and 'More settings', along with a 'Print' button at the bottom.



NEW Chapter 17: Event Summary

NEW Introduction

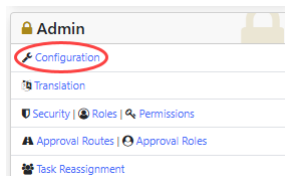
The Event Summary tab contains the written report summarizing the *entire* event from initiation, investigation, root cause analysis, risk assessment, and the tasks with actions (containment, correction, corrective, preventive, validation, etc.).

NEW Configuration

A configuration setting enables the Event Summary to be added as the last section of the 8D Report and the Management Review Report.

Note: While displaying the event summary on these reports is possible, use this feature with caution as it will likely result in adding a significant amount of duplicate information that is already on the reports.

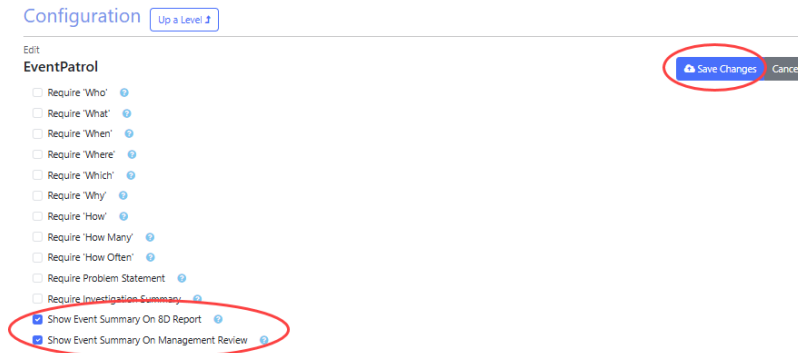
114. To add the Event Summary as the last section of the 8D Report or the Management Review Report, click on the Configuration hyperlink in the Admin card of the PatrolSuite homepage.



- a. Click on the “EventPatrol” ‘Edit’ button.

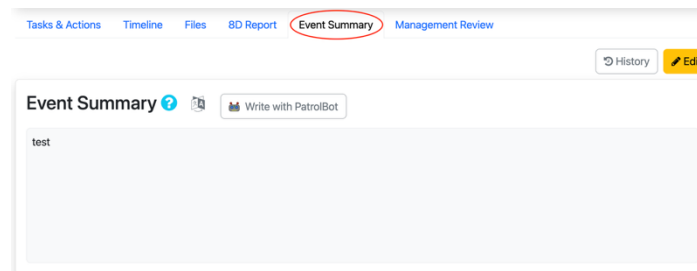


- b. Check the “Show Event Summary On 8D Report” or “Show Event Summary On Management Review” checkboxes as desired and click the ‘Save Changes’ button.

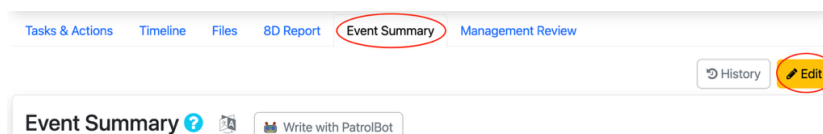


NEW Event Summary Report

115. To view the event summary report, click on the “Event Summary” tab.

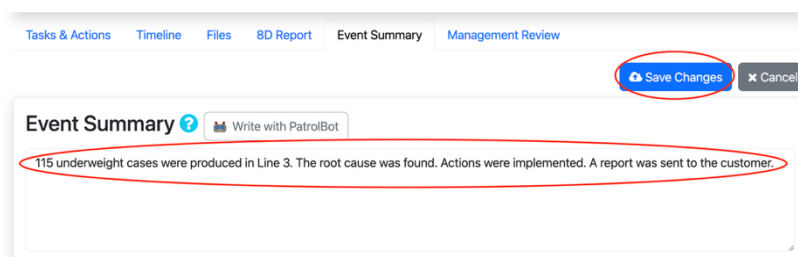


116. To draft a written summary of the entire event, click on the “Event Summary” tab and click the ‘Edit’ button.



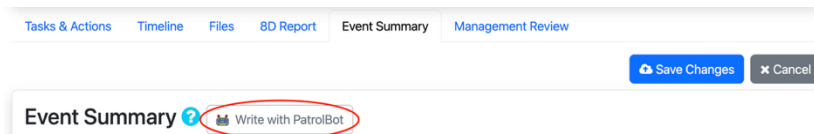
There are two options for writing the Event Summary:

- Write with Keyboard.** Click into the investigation summary cell and use your keyboard to type the summary. When finished, click the ‘Save Changes’ button.



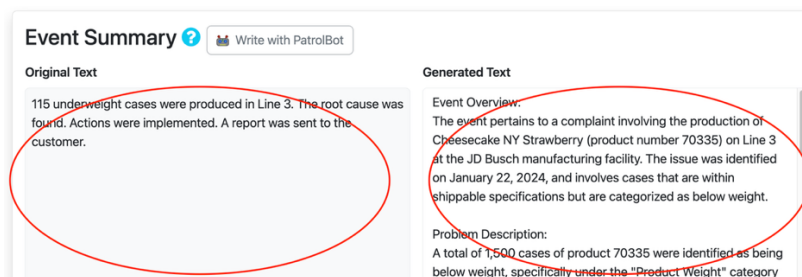


- b. **Write with PatrolBot.** Click on the 'Write with PatrolBot' button and let artificial intelligence write the summary.

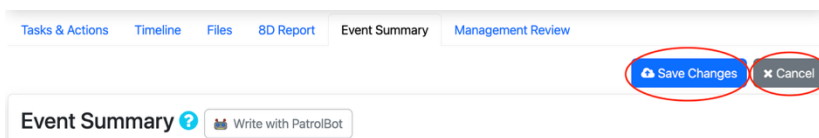


Note: The event summary will be created based in the information contained in the event meta data (which may originate from AuditPatrol or ComplaintPatrol, if applicable), the Investigation, Root Cause Analysis, and Risk Assessment tasks, the Tasks with Actions, and any existing Event Summary information.

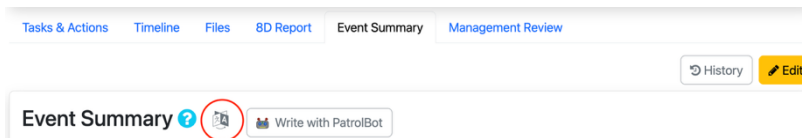
Note: If an investigation summary already exists, then both the Original Text and the suggested AI Generated Text will be presented side by side.



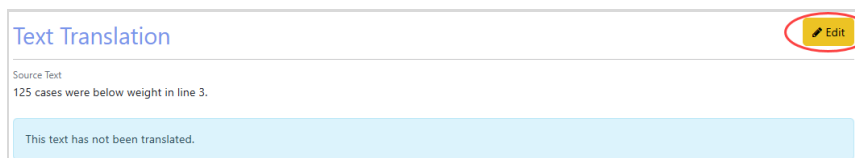
- i. To accept the AI Generated event summary, click on the 'Save Changes' button.
- ii. To retain the Original Text (and disregard the AI Generated event summary), click on the 'Cancel' button.



117. To translate the event summary into required languages, click on the localization icon.



- a. Click the 'Edit' button.



- b. Enter the localized text and click the 'Save Changes' button.



Edit Data Translation Save Changes Cancel

Source Text
125 cases were below weight in line 3.

Language	Text
Chinese - 中国人	
Dutch - Nederlands	

NEW Event Summary History

118. To view an audit trail of changes to the event summary, click the 'History' button.

History Edit

Event Summary Write with PatrolBot

Event Overview:
On March 3, 2026, during the morning shift at the Arlington facility's Manufacturing Line 1, Workcenter ARL_Bowl2, an environmental incident occurred involving the release of wastewater containing cleaning chemicals above the permitted limit. The event was identified as a land/water emission exceeding allowable levels.

Problem Description:
A production operator noticed that approximately 6 liters of cleaning water were discharged beyond the expected amount. The cause was traced to the drain valve connected to Bowl Mixer 2 being left open after equipment cleaning. This oversight resulted in continued flow of



NEW Chapter 18: Management Review

NEW Introduction

The Management Review tab displays the event information and summary statistics in a format designed to facilitate Management Review. The intended audience of this report is supervisors and managers who need more information than is provided in the 8D Report.

NEW View Report

119. To view the Management Review report, click on the “Management Review” tab.

The screenshot shows the 'Management Review' tab for 'Event 70'. The interface includes a navigation bar with tabs for 'Tasks & Actions', 'Timeline', 'Files', '8D Report', 'Event Summary', and 'Management Review' (highlighted). The main content area displays event details such as 'Product: Chesapeake NY Strawberry' and 'Quantity: 1 1000 Cases (20)'. Below this, there are sections for 'Problem Statement', 'Investigation Summary', 'Root Causes', and 'Risk Assessment'. The 'Risk Assessment' section shows a 'Risk Priority Number' of 75 and a 'Frequency of Similar Events' of 4 times in the past 1 year(s). There are also several gauges and charts, including 'Risk Investigation 826.1', 'Root Cause Analysis 224', 'Risk Assessment 806', and 'Days Open 827.2'. The 'Actions' section shows a pie chart with categories: Open (6), Successful (0), Unsuccessful (2), On Time (3), Late 1-2 Weeks (0), and Late > 2 Weeks (7). The bottom section contains a table of 'Containment Actions', 'Safety Actions', 'Corrective Actions', 'Preventive Actions', and 'Verification/Validation Actions'.



NEW Print Report


120. To print the Management Review report, right click on the page and select “Print,” select the desired printer, and click on the ‘Print’ button.

The screenshot displays the EventPatrol interface for 'Event 70'. The main content area shows a report with sections: Problem Statement (125 cases were below weight in line 3), Investigation Summary (125 cases below weight. Found that the in-line check weigher was not calibrated correctly), Root Causes (Equipment: In-line check weigher out of calibration; People / Training: The wrong procedure was used to calibrate the check weigher), and Risk Assessment. A right-click context menu is open over the 'Print' option, which is circled in red. The menu includes options like Back, Refresh, Save as, Print, Send tab to your devices, Create QR Code for this page, Translate to English, Visual Search, Screenshot, More tools, View page source, and Inspect. To the right, a print settings panel is visible, showing '2 sheets of paper', 'Destination: EPSON WF-4630 Serie' (circled in red), 'Pages: All', 'Copies: 1', 'Layout: Portrait', 'Color: Black and white', and a 'Print' button.



Chapter 19: Dashboard

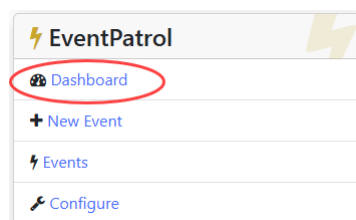
Security

 Users in a PatrolSuite role with the following permissions will have access to view the EventPatrol Dashboard.

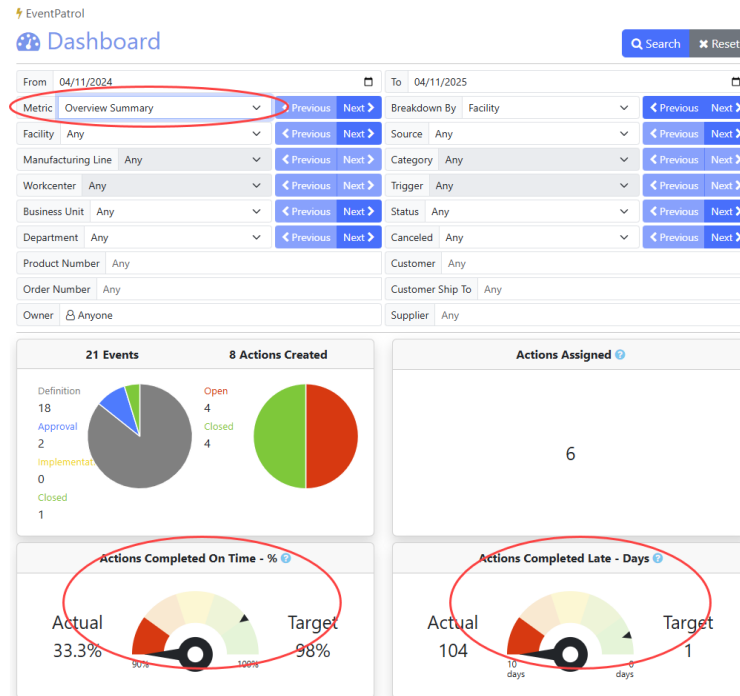
EventPatrol		
<input type="radio"/> No	Add Action	Allows users to re-open a closed action task, to add new actions, and to close an action task.
<input type="radio"/> No	Admin	Allows users to edit the configuration settings and all events, including changing the event owner
<input type="radio"/> No	Create	Allows users to create events that originate from EventPatrol.
<input checked="" type="radio"/> Yes	Dashboard	Allows users to view the EventPatrol dashboard.
<input type="radio"/> No	View	Allows users to view all events.

Dashboard Metrics & Filtering

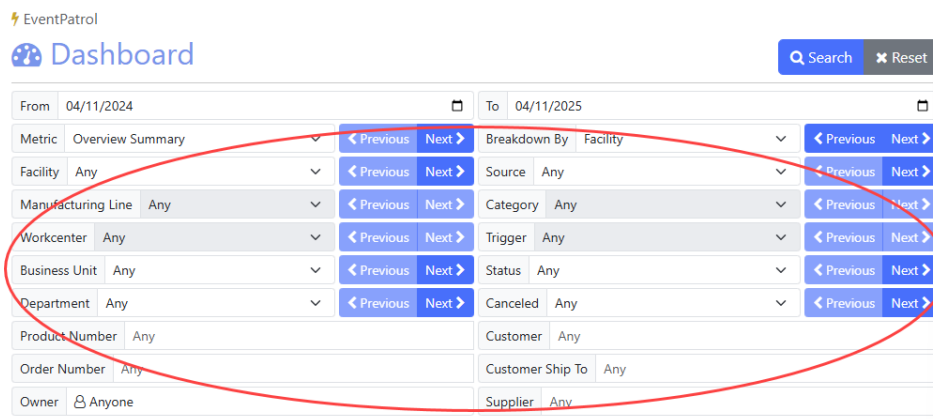
121. From the PatrolSuite homepage, click the Dashboard hyperlink in the EventPatrol card.



122. By default, the EventPatrol dashboard summary page is displayed. This page provides an overview of popular metrics. To view a specific complaint metric, select a desired metric, or click on the header of the desired metric card. Page: {PatrolSuite URL}/Event/Dashboard



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



124. To breakdown a metric by desired criteria, choose a metric and select the desired breakdown variable.



The screenshot shows the EventPatrol Dashboard with various filters and data visualizations. The 'Breakdown By' dropdown menu is open, showing 'Trigger' selected. The 'Download' button is highlighted in the top right corner.

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

The screenshot shows the EventPatrol Dashboard with various filters and data visualizations. The 'Download' button is highlighted in the top right corner.



Exhibit A: Event Workflow

Action Event Workflow (for a customer complaint)

