



Contents

CHAPTER 1: INTRODUCTION..... 4

INTRODUCTION..... 4

ACCESS 4


BROWSER 4


NEW DEFINITIONS..... 5

SYMBOL KEY 7

CHAPTER 2: SECURITY 8

NEW INTRODUCTION..... 8

 ROLES 8

 PERMISSIONS..... 9

CHAPTER 3: CONFIGURE - FACILITIES..... 11

NAVIGATION TO CERTPATROL CONFIGURE..... 11

FACILITY INFORMATION - FACILITIES..... 11

FACILITY INFORMATION – ALTERNATE ORIGINS..... 13

CHAPTER 4: TEMPLATE OVERVIEW..... 14

CERTIFICATE TEMPLATE LEVELS 14

CERTIFICATE TEMPLATE LOGIC 15

COA TYPES 15

CHAPTER 5: SEARCH TEMPLATES 17

NEW INTRODUCTION 17

NEW SEARCH EXISTING CoA TEMPLATES 17

CHAPTER 6: MASTER TEMPLATE 19

EDIT MASTER TEMPLATE 19

CHAPTER 7: CREATE NEW TEMPLATE 24

NEW INTRODUCTION 24

CREATE NEW CUSTOMER TEMPLATE 24

CREATE NEW PRODUCT GROUP TEMPLATE 27

CREATE NEW PRODUCT TEMPLATE..... 27

CREATE NEW CUSTOMER/PRODUCT GROUP TEMPLATE..... 28

CREATE NEW CUSTOMER/PRODUCT TEMPLATE..... 29

CHAPTER 8: SEARCH CERTIFICATES 31

SEARCH FOR A CoA 31

CHAPTER 9: CREATE A CoA 32

CREATE A NEW CoA..... 32

ADD TEST RESULTS..... 36

NEW HIDE TEST RESULTS..... 38

SAVE THE CERTIFICATE..... 38

PRINT A CERTIFICATE..... 39

SAVE A CERTIFICATE AS PDF..... 39

EMAIL A CERTIFICATE..... 40



CHAPTER 10: SHIPMENT MONITOR	41
NEW INTEGRATION	41
SHIPMENTS WITHOUT CERTIFICATES	41
RECENT SHIPMENTS	42
ALL SHIPMENTS	43
NEW CHAPTER 11: LEGACY CERTIFICATES	44
INTEGRATION	44



Chapter 1: Introduction

Introduction

CertPatrol™ is a PatrolSuite module that facilitates the semi-automated (and potentially fully automated given ERP/MES integration) creation of Certificates of Analysis (CoAs) that meet pre-defined customer requirements. CertPatrol is also multi-lingual and will automatically create CoAs in the appropriate language based on the facility, customer, and corporate language settings.

The CertPatrol CoA format is based on the following global standards:

- **ASTM E1831-96** Standard Guide for Preparing Certificates...
- **ISO Guide 31** Contents of Certificates...
(the CRM components for the references above are ignored)
- **IPEC Certificate of Analysis Guide** International Pharmaceutical Excipients Council...

Certificate Format


CertPatrol creates and saves CoAs in HTML format, and each CoA reflects the test results and specs at the moment in time when the CoA was created. Therefore, if a CoA is created, and then tests are subsequently re-run, a new CoA must be created to capture the latest test results. However, both CoAs are retained, are retrievable, and are printable.

Saving CoAs Externally

CertPatrol stores CoAs in a database-directed location on the PatrolSuite server for retrieval via CertPatrol. This location is typically not exposed to CertPatrol users. MAP recommends creating a public network folder where users can save CoAs as .pdf documents (via “Print as PDF”) for retrieval outside of CertPatrol.

Access

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

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

Browser

PatrolSuite™ is accessed through a web browser. The platform and all its applications are certified for use



with Google Chrome, Microsoft Edge, and Safari. To ensure full functionality and the best user experience, MAP strongly recommends using one of these supported browsers.

NEW Definitions

Business Partner – Customers and Suppliers.

Certificate of Analysis – A document issued and signed by an inspection authority that states that the (CoA) referenced material (typically identified by batch, lot, or unit number) has been analyzed in accordance with a specified standard or procedure, shows the results of those tests, and shows the applicable specifications such that the recipient can confirm that the material meets quality requirements.

Certificate of Conformance – A document issued by an inspection authority that states that the (CoC) referenced material was made in accordance with applicable quality requirements. The applicable quality requirements are not specified, nor are test results, nor are specifications. Due to the generic and low-value-added nature of CoCs, CertPatrol does not produce CoCs at this time.

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

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

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

Order – A set of data with a unique order number (typically originating from the MES or ERP) to identify a:

- Inbound Receiving order (often a “purchase order”) for raw materials
- Manufacturing order and its related product and customer
- Outbound Shipping order for finished goods being shipped to customers.

Product – A tangible output or item that is created through a controlled process involving raw materials, labor, machinery, and other inputs, intended for use, sale, or further processing. Types of products include:

- Finished Goods: Ready for sale to end users (e.g. computers, bicycles, paper).
- Semi-Finished Goods: Used as components in other products (e.g. engine parts, circuit boards).
- Raw Materials: Basic inputs for production (e.g., glue, steel, plastic pellets, lumber).

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

Quality Assurance (QA) – A proactive process that focuses on preventing defects by ensuring that the processes used to manage and create deliverables are effective and followed correctly.

- Focus: Process-oriented
- Goal: Prevent defects before they happen
- When: Throughout the product development and prior to the manufacturing process
- Methods: Process audits, training, standard operating procedures (SOPs), continuous improvement
- Responsibility: Business management, quality management, and process engineers

Quality Control (QC) – A reactive process that focuses on identifying defects in the finished product through inspection and testing.

- Focus: Product-oriented



-
- Goal: Detect and fix defects after they occur
 - When: After production or at specific checkpoints during production
 - Methods: Inspections, measurements, product testing, sampling, statistical process control (SPC)
 - Responsibility: Laboratory technicians, quality inspectors, or testing personnel

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

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

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

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

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

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

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

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

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

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

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

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

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

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







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

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

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

Symbol Key

The following symbols are used in this user guide.

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



Chapter 2: Security

NEW

Introduction

To grant a permission to a user, the user must be placed into a Role that has the permission activated. Roles are user defined. Permissions are not user-defined, they are part of the PatrolSuite software.

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



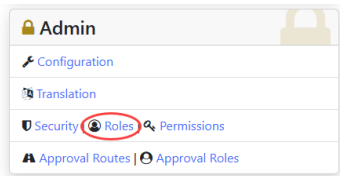
In summary, the process of defining user security in PatrolSuite is as follows:

- I) Define the PatrolSuite Role.
- II) Activate the desired PatrolSuite permissions for the Role.
- III) Create the Active Directory group that corresponds to the PatrolSuite Role.
- IV) Place the desired people into the Active Directory group.
- V) Add the Active Directory group into the PatrolSuite Role.

Roles

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

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



2. MAP recommends creating the following CertPatrol Roles:

CertPatrol Manager	7	Active
CertPatrol User	3	Active
CertPatrol Viewer	3	Active



- See the “QualityPatrol – Configure” user guide for how to create the roles, associate them with an Active Directory group, and grant permissions.

Permissions








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

- To grant permissions to a CertPatrol Role, click on the desired Role name.

CertPatrol Manager	7	Active
CertPatrol User	3	Active
CertPatrol Viewer	3	Active

- Scroll down to the CertPatrol 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 **CertPatrol Manager** Role is typically granted the following permissions:

CertPatrol		
	Test Results - Add	Allow users to add additional test results when creating certificates.
	Create	Allows users to create certificates. Also allows users to ignore certificates in the shipment monitor.
	Edit Master Template	Allows users to edit certificate Master Template
	Test Results - Hide	Allows users to hide existing test results when creating certificates.
	Legacy Certificates	Allows users to search for and to view certificates created using QDMS provided that QDMS shared the same database as the current PatrolSuite instance.
	Manage	Allows users to edit certificate configuration settings.
	View	Allows users to view all CertPatrol and ShipmentMonitor pages.

Note: The “Test Results - Hide” permission that enables a user to remove test results from a CoA.

Caution: The “Test Results - Add” and “Test Results - Hide” permissions give users the ability to remove existing or to add new test methods and corresponding results and specifications. These permissions are not typically granted to *anyone* if *all* testing is captured in QualityPatrol. The intent of this capability is to enable organizations who are migrating from a legacy quality system to QualityPatrol, where, for a short period of time, some test results are in the legacy system and some are in QualityPatrol, to create CoAs in CertPatrol that contain data from both systems. Additionally, ad hoc test results are stored only as part of the HTML CoA file; the data is not stored in the QualityPatrol database and therefore is not visible via DashPatrol, DataPatrol, or via any Reports.

The **CertPatrol User** Role is typically granted the following permissions:

CertPatrol		
	Test Results - Add	Allow users to add additional test results when creating certificates.
	Create	Allows users to create certificates. Also allows users to ignore certificates in the shipment monitor.
	Edit Master Template	Allows users to edit certificate Master Template
	Test Results - Hide	Allows users to hide existing test results when creating certificates.
	Legacy Certificates	Allows users to search for and to view certificates created using QDMS provided that QDMS shared the same database as the current PatrolSuite instance.
	Manage	Allows users to edit certificate configuration settings.
	View	Allows users to view all CertPatrol and ShipmentMonitor pages.



The **CertPatrol Viewer** Role is typically granted the following permissions:

CertPatrol		
No	Test Results - Add	Allow users to add additional test results when creating certificates.
No	Create	Allows users to create certificates. Also allows users to ignore certificates in the shipment monitor.
No	Edit Master Template	Allows users to edit certificate Master Template
No	Test Results - Hide	Allows users to hide existing test results when creating certificates.
No	Legacy Certificates	Allows users to search for and to view certificates created using QDMS provided that QDMS shared the same database as the current PatrolSuite instance.
No	Manage	Allows users to edit certificate configuration settings.
Yes	View	Allows users to view all CertPatrol and ShipmentMonitor pages.

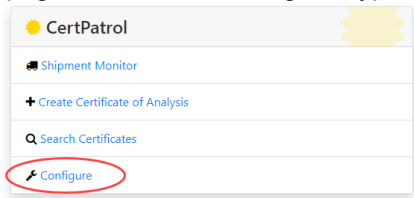


Chapter 3: Configure - Facilities

 Note: Typically, only users in the CertPatrol Manager role are granted access to CertPatrol Configure.

Navigation to CertPatrol Configure

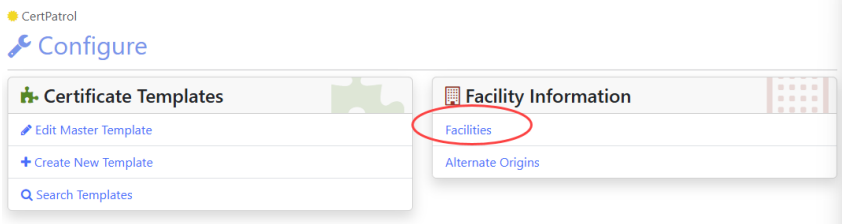
5. To access the CertPatrol configure page, click on the Configure hyperlink within the CertPatrol frame.



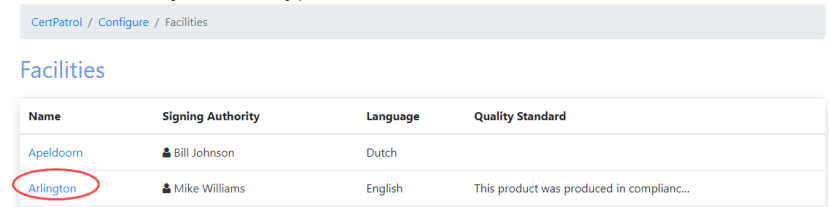
Facility Information - Facilities

The Facilities page displays the organization’s facilities (as defined and managed within the PatrolSuite/Ecosystem/Facilities page).

6. To the define the CoA information for a manufacturing plant, click on the Facilities hyperlink.



a. Click on the desired Facility Name hyperlink.



b. The CoA Facilities page allows management of the following information which will appear on *all* COAs created by the applicable facility. Click on the Edit button to add/change the information.



CertPatrol > Configure > Facilities > Arlington

Arlington Edit

Language English

Company Name Food Products Corporation

Company Name (short) Food Products

Quality Standard
This product was produced in compliance with...

Certificate Approval
No text defined...

Signing Authority Mike Williams

Modified Chris Lloyd 10/11/2025 4:26 PM
Created Gary Stephon 3/25/2021 11:28 PM

Language. This is the default language for the facility. When a CoA is created, CertPatrol will produce a version of the CoA in up to three languages: (i) The language of the Facility (as defined herein); (ii) the language of the Customer (as defined in the customer or customer/product CoA template); and (iii) the language of the corporate headquarters (as defined in the PatrolSuite/Admin/Configuration/Localization page).

Company Name. This is the “formal” company name which appears in the upper right-hand corner of the CoA above the address info.



Certificate: 1016

Certificate of Analysis

Arex Corporation, Inc.
5300 Industrial Drive
Chicago, Illinois 60601
Phone: 312-797-4414

Date: 2021-07-30

Customer Information

Company Name (short). This is the “informal” name which appears in the Product Information frame of the CoA:

Product Information

Kenseth Korp Product Number	8376219
Kenseth Korp Product Name	LinST-NFL-Full
Arex Product Number	01946
Arex Product Name	BKDPLNFL 100-A
Manufacturing Order	2113269

Quality Standard text. This is the text that appears below the “Quality Standard” section.

Quality Standard

This products was produced according to the ISO9001 quality system.

Certificate Approval text. This is the text that appears below the “Certificate Approval” section. Typically, MAP customers do not add text here because the person who created the certificate and the certificate approval authority are clearly identified on the certificate.



Certificate Approval

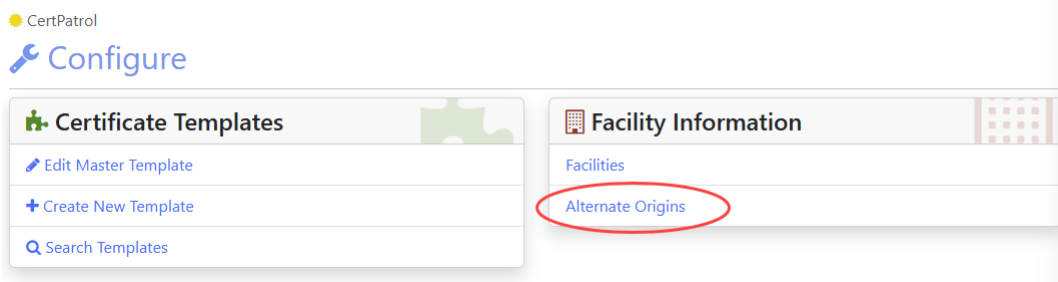
This CoA approved by:

Signing Authority. This is the name of the person at the manufacturing facility who is responsible for all certificates produced at the facility (typically the quality manager). This is not the person who creates each certificate. The person who creates each certificate is separately identified on the certificate.

Certificate Approved By: _____
Name Signature

Facility Information – Alternate Origins

Alternate Origins allow CoAs to be created that indicate that the product originated from a different company or manufacturing facility. This feature is “off” by default to avoid potential regulatory violations. Contact MAP if there is a need to enable the Alternate Origins feature.

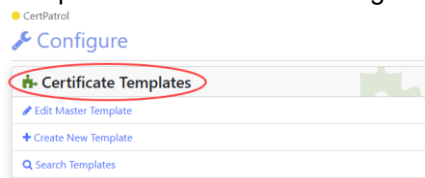




Chapter 4: Template Overview

Certificate Template Levels

The Certificate Templates pages facilitate the creation and management of CoA “templates.” A template is where the specific requirements for a CoA are defined. Templates can be defined at the following levels, and at each level, one can choose to inherit settings or content from the preceding level, or to ignore the settings or content from the previous level and replace them with new settings or content.



- **Level #6: Master Template**. This is the highest, or most generic, level of CoA templates. The Master Template defines the default CoA type, display options, and verbiage that appears on all CoAs produced across the enterprise (i.e. at all facilities) in the absence of an applicable lower-level template shown below (customer, product group, product, customer/product group, or customer/product template).
- **Level #5: Customer Template**. The Customer Template defines the default CoA type, display options, and verbiage that appears on all CoAs produced for a certain customer in the absence of an applicable lower-level template shown below (product group, product, customer/product group, or customer/product template).
- **Level #4: Product Group Template**. The Product Group Template defines the default CoA type, display options, and verbiage that appears on all CoAs produced for a certain product group in the absence of an applicable lower-level template shown below (product, customer/product group, or customer/product template).
- **Level #3: Product Template**. The Product Template defines the default CoA type, display options, and verbiage that appears on all CoAs produced for a certain product in the absence of an applicable lower-level customer/product group or customer/product template.
- **Level #2: Customer/Product Group Template**. The Customer/Product Group Template defines the default CoA type, display options, and verbiage that appears on all CoAs produced for a certain customer/product group in the absence of an applicable lower-level customer/product template shown below.
- **Level #1: Customer/Product Template**. This is the lowest, or most specific, level of CoA templates . The Customer/Product Template defines the default CoA type, display options, and verbiage that appears on all CoAs produced for a certain customer/product combination.



Certificate Template Logic

When a CoA is created:

- 1) CertPatrol first looks to see if there is a matching template at level #1. If so, it creates the CoA based on the requirements defined at level #1. If no matching template is found at level #1, then:
- 2) CertPatrol looks to see if there is a matching template at level #2. If so, it creates the CoA based on the requirements defined at level #2. If no matching template is found at level #2, then:
- 3) CertPatrol looks to see if there is a matching template at level #3. If so, it creates the CoA based on the requirements defined at level #3. If no matching template is found at level #3, then:
- 4) CertPatrol looks to see if there is a matching template at level #4. If so, it creates the CoA based on the requirements defined at level #4. If no matching template is found at level #4, then:
- 5) CertPatrol looks to see if there is a matching template at level #5. If so, it creates the CoA based on the requirements defined at level #5. If no matching template is found at level #5, then:
- 6) CertPatrol creates the CoA based on the requirements defined in the Master Template (level #6).

Note: Accordingly, lower-level templates need to be created only if the requirements defined in the Master Template do not meet the needs for an outgoing CoA.

CoA Types

When creating a template, CertPatrol allows the user to choose between four different certificate “types” which result in differences in how the data in the Analysis Results section is displayed.

Certificate Contents

- **Summary by Unit.** This CoA calculates the test results and displays them in “summary” format with one line item for each applicable test method where “N” is the number of tests performed and the average result is displayed. The Summary by Unit type uses test results from only those units that are being shipped. Accordingly, if product testing is not performed on each unit, it is possible that a shipment might contain no units that were tested for a certain test method, and therefore the corresponding CoA might not contain a result for a required test.

Analysis Results							
Test Method	Summary	Units	N	Spec	Avg	Min	Max
Basis Weight							
DIN EN ISO 536		g/m ²	9	21.5 - 26.3	24.2	23.3	25.2
Caliper							
PA 2.1-04		um	9	22.5 - 27.5	25.3	24.3	26.3
Release Tape							
FINAT 10		cN/cm	72	1.0 - 15.0	7.6	5.6	12.4
Strength							
DIN EN ISO 527-3 (Elongation CD)		%	11	300.0 -	561.6	509.1	616.7
DIN EN ISO 527-3 (Elongation MD)		%	11	250.0 -	444.0	421.5	462.1
DIN EN ISO 527-3 (Load at Break CD)		N	11	20.0 -	26.6	23.5	30.0
DIN EN ISO 527-3 (Load at Break MD)		N	11	20.0 -	39.2	36.4	42.4



- **Summary by Order.** This CoA calculates the test results and displays them in “summary” format with one line item for each applicable test method where “N” is the number of tests performed and the average result is displayed (identical to the Summary by Unit CoA shown above). The Summary by Order type uses all test results from the applicable manufacturing order(s), regardless of which units are being shipped. Accordingly, if product testing is conducted at least once per manufacturing order, then this CoA type will contain results for each test method appearing on the CoA.

Analysis Results						
Summary						
Test Method	Units	N	Spec	Avg	Min	Max
Basis Weight						
DIN EN ISO 536	g/m ²	1	21.5 - 26.3	24.7	24.7	24.7
Caliper						
PA 2.1-04	um	1	22.5 - 27.5	25.4	25.4	25.4
Strength						
DIN EN ISO 527-3 (Elongation CD)	%	1	300.0 -	539.0	539.0	539.0
DIN EN ISO 527-3 (Elongation MD)	%	1	250.0 -	414.8	414.8	414.8
DIN EN ISO 527-3 (Load at Break CD)	N	1	20.0 -	26.4	26.4	26.4
DIN EN ISO 527-3 (Load at Break MD)	N	1	20.0 -	42.7	42.7	42.7
DIN EN ISO 527-3 (Tensile strength CD)	N/mm2	1	25.0 -	42.2	42.2	42.2
DIN EN ISO 527-3 (Tensile strength MD)	N/mm2	1	25.0 -	68.3	68.3	68.3
Detailed						
Unit Number	Units	N	Spec	Value	Min	Max
Basis Weight DIN EN ISO 536						
000016EE08	g/m ²	1	21.5 - 26.3	24.7		
Caliper PA 2.1-04						
000016EE08	um	1	22.5 - 27.5	25.4		
Strength DIN EN ISO 527-3 (Elongation CD)						
000016EE08	%	1	300.0 -	539.0		
Strength DIN EN ISO 527-3 (Elongation MD)						
000016EE08	%	1	250.0 -	414.8		
Strength DIN EN ISO 527-3 (Load at Break CD)						
000016EE08	N	1	20.0 -	26.4		
Strength DIN EN ISO 527-3 (Load at Break MD)						
000016EE08	N	1	20.0 -	42.7		
Strength DIN EN ISO 527-3 (Tensile strength CD)						
000016EE08	N/mm2	1	25.0 -	42.2		
Strength DIN EN ISO 527-3 (Tensile strength MD)						
000016EE08	N/mm2	1	25.0 -	68.3		

- **Detailed.** This CoA calculates the test results and displays them in “detail” format with one line item for each actual test performed on each unit included in the CoA. This CoA type can result in multi-page CoAs if a large number of tested units are included in the CoA.

Analysis Results						
Detailed						
Unit Number	Units	N	Spec	Value	Min	Max
Basis Weight DIN EN ISO 536						
000015LY08	g/m ²	1	21.5 - 26.3	24.5		
000015S508	g/m ²	1	21.5 - 26.3	23.8		
Caliper PA 2.1-04						
000015LY08	um	1	22.5 - 27.5	25.6		
000015S508	um	1	22.5 - 27.5	24.8		
Release Tape FINAT 10						
000015W408	cN/cm	3	1.0 - 15.0	7.8	7.0	8.0
000015ZK08	cN/cm	3	1.0 - 15.0	5.8	5.0	5.0
000015ZU08	cN/cm	3	1.0 - 15.0	6.1	5.0	6.0
Strength DIN EN ISO 527-3 (Elongation CD)						
000015LY08	%	1	300.0 -	495.0		
000015S508	%	1	300.0 -	535.8		

- **Combination.** This CoA is a combination of the Summary by Order and the Detailed CoA. This CoA type provides the recipient with the summary statistics as well as the test result breakdown by unit shipped.



Chapter 5: Search Templates

NEW Introduction

The search templates page displays the CoA templates that have been “created.” A CoA template is “created” when a user clicks on the ‘New Template’ button *and* any of the following apply:

- A customer language is chosen.
- One or more CoA recipients are defined.
- Specification Version data is defined.
- A certificate type is chosen.
- An alternate origin is chosen.
- One or more display options are *not* set to “Inherit.”
- Verbiage text is appended or replaced.

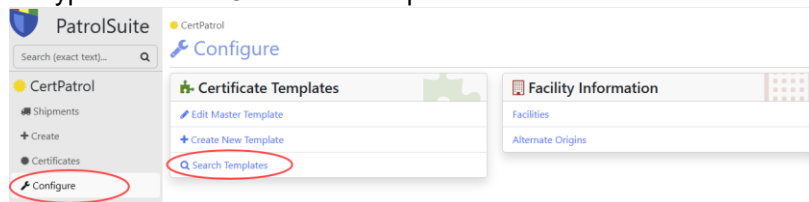
Certificate templates are located on Page: {PatrolSuite URL}/Certificate/SearchTemplates

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

Yes	Manage	Allows users to edit certificate configuration settings.
-----	--------	--

NEW Search Existing CoA Templates

- To view the existing CoA templates, click on the CertPatrol Configure option in the menu or click on the Search Templates hyperlink in the Certificate Templates card.



- Enter a customer or product name or number and click on the ‘Search’ button.

Note: The Master Template is shown at the top of the list.

Note: Click on the “Customer” or “Product” column header to sort the data grid.

Note: Click on the Certificate Type hyperlink to open the applicable Edit Template page

Note: A new template can be created by clicking on the ‘New Template’ button.



CertPatrol

Search Templates

Enter customer or product name or number

Certificate Type	Customer	Product
Combination	Master Template	Master Template
Combination		09722 ▾ FUDGE SWIRL
Combination		
Combination		01946 ▾ BKDPLNFL
Combination		
Combination		13042 ▾ GOG16"P
Combination		
Combination	0070069273 ▾ Cielito Querido	
Combination	0070013104 ▾ #0626 COUNTRY MARKET XDCK	
Combination	0070013104 ▾ #0626 COUNTRY MARKET XDCK	09722 ▾ FUDGE SWIRL

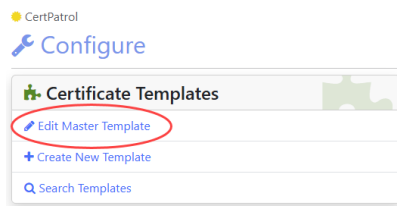


Chapter 6: Master Template

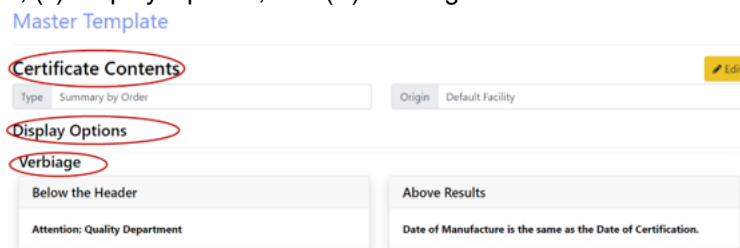
The Master Template is used if a user creates a certificate for which no template exists for the applicable product and customer. Theoretically, if all certificates created by the organization were identical (i.e. no unique customer or product information or data requirements are on the CoA), then the organization would only have to define a Master Template; no other templates would be needed.

Edit Master Template

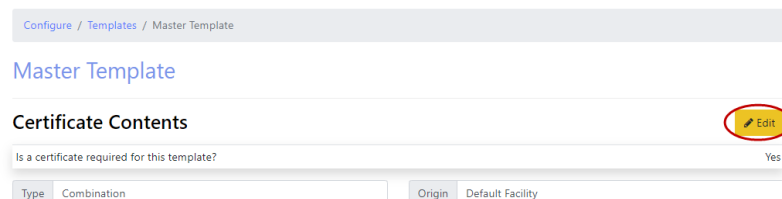
8. To edit the master template, on the CertPatrol Configure page, click on the Edit Master Template hyperlink.



Note: The CoA templates (including the Master Template) are organized into three areas of content: (i) Certificate Contents; (ii) Display Options; and (iii) Verbiage.



- a. Click on the Edit button.



- b. Choose whether a certificate is required for this template.

NEW **Note:** The default Master Template selection for 'Is a certificate required' is "No."



NEW **Note:** If a manufacturing or outbound shipping order is created for which there is no product/customer template, and the 'Is a certificate required' for the Master Template' is "No," then CertPatrol Shipment Monitor will conclude that no certificate is needed. However, this will not prevent a user from manually creating a CoA using the Master Template.

NEW **Note:** If a manufacturing or outbound shipping order is created for which there is no product/customer template, and the 'Is a certificate required' for the Master Template' is "Yes," then CertPatrol Shipment Monitor will conclude that a certificate needs to be created (based on the Master Template). This could cause an administrative headache as now lower-level templates would need to be created to define the product/customer templates that do not require CoAs ('Is a certificate required' = No) so that Shipment Monitor does not get filled up with prompts to create unnecessary certificates.

- c. Choose the certificate Type (options discussed in the previous chapter). "Summary by Order" is the most common selection for the Master Template across MAP's customer base, but your manufacturing and customer requirements may dictate a different choice.

Master Template

- d. Choose the Origin. MAP recommends choosing "Default Facility" for the Master Template. This means that the company name and address displayed in the header of the CoA will be that of the applicable facility where the product was produced. However, an Alternate Facility can be chosen. If an alternate facility is chosen, then the company name and address displayed in the header of the CoA will be that of the chosen alternate facility regardless of where the product was produced.

Master Template

- e. Choose the desired Display Options. The Display Options are organized into the three corresponding areas of information on the CoA: Manufacturing Information, Product Information, and Analysis Information. The information in each section can be displayed on the CoA (choose "Show"), or not displayed (choose "Hide").



Display Options

Manufacturing Information	
<input checked="" type="checkbox"/> Manufacturing Date	Show
<input checked="" type="checkbox"/> Order Number	Show
<input type="checkbox"/> Input Order Numbers	Hide
<input type="checkbox"/> Finished Units	Hide
<input checked="" type="checkbox"/> Customer PO Number	Show
<input checked="" type="checkbox"/> Specification Version Number	Show
<input checked="" type="checkbox"/> Specification Version Date	Show
<input checked="" type="checkbox"/> Shipment Date	Show
<input checked="" type="checkbox"/> Sales Order Number	Show
<input checked="" type="checkbox"/> Contract Number	Show

Product Information	
<input checked="" type="checkbox"/> Product Number	Show
<input checked="" type="checkbox"/> Product Name	Show
<input type="checkbox"/> Product Description	Hide
<input checked="" type="checkbox"/> Customer Product Number	Show
<input checked="" type="checkbox"/> Shelf Life	Show

Analysis Information	
Test Method Name and Number	
<input checked="" type="checkbox"/> Property	Both
<input checked="" type="checkbox"/> Unit of Measure	Show
<input checked="" type="checkbox"/> Number of Tests (N)	Show
<input type="checkbox"/> Target	Show
<input checked="" type="checkbox"/> Specification Limits	Hide
<input checked="" type="checkbox"/> Result	Show
<input type="checkbox"/> Standard Deviation	Show
<input checked="" type="checkbox"/> Minimum & Maximum	Hide
<input type="checkbox"/>	Show

Unit numbers displayed in the detailed section Finished Units

- f. Enter any additional text that needs to appear on the CoA in the designated “Verbiage” areas.

Verbiage

Below the Header Attention: Quality Department	Above Results Date of Manufacture is the same as the Date of Certification.
Below Results This material has been produced in compliance with the requirements of applicable specifications unless otherwise noted below. We hereby certify that the results are representative of those contained in the records of the company.	Additional Delivery Instructions None

Note: The below image shows where the additional verbiage text will appear on the CoA.



Certificate: 1023

Certificate of Analysis Attention: Quality Department

Customer Information

Customer Name POLYGLASS I
Customer Address 555 OAK
HAZLETON, PA 18201
US
Customer Order Number A1-100276

Location of the Below Header text

Product Information

POLYGLASS Product Number RM7 PERF
Arex Product Number 2003650
Arex Product Name NG732_BW
Product Shelf Life

Manufacturing Information

Order Numbers 0080000464

Unit Numbers

1. 0000133E08	13. 0000134K08	25. 0000136B08	37. 000014DI08
2. 0000133F08	14. 0000134L08	26. 0000136C08	38. 000014DJ08
3. 0000133G08	15. 0000134M08	27. 0000136D08	39. 000014DK08
4. 0000133H08	16. 0000134N08	28. 0000136E08	40. 000014DL08
5. 0000133W08	17. 0000135808	29. 0000136T08	41. 000014E308
6. 0000133X08	18. 0000135908	30. 0000136U08	42. 000014E408
7. 0000133Y08	19. 0000135A08	31. 0000136V08	43. 000014E508
8. 0000133Z08	20. 0000135B08	32. 0000136W08	44. 000014E608
9. 0000134708	21. 0000135P08	33. 0000137I08	
10. 0000134808	22. 0000135Q08	34. 0000137J08	
11. 0000134908	23. 0000135R08	35. 000013Y008	
12. 0000134A08	24. 0000135S08	36. 000013Y108	

Location of the Above Results text

This product has a shelf life of 12 months from date of manufacture. Date of Manufacture is the same as the Date of Certification.

Analysis Results

Test Method	Summary					
	Units	N	Spec	Avg	Min	Max
Basis Weight						
DIN EN ISO 536	g/m ²	9	21.5 - 26.3	24.2	23.3	25.2
Caliper						
PA 2.1-04	um	9	22.5 - 27.5	25.3	24.3	26.3
Release Tape						
FINAT 10	cN/cm	72	1.0 - 15.0	7.6	5.6	12.4
Strength						
DIN EN ISO 527-3 (Elongation CD)	%	11	300.0 -	561.6	509.1	616.7
DIN EN ISO 527-3 (Elongation MD)	%	11	250.0 -	444.0	421.5	462.1
DIN EN ISO 527-3 (Load at Break CD)	N	11	20.0 -	26.6	23.5	30.0
DIN EN ISO 527-3 (Load at Break MD)	N	11	20.0 -	39.2	36.4	42.4
DIN EN ISO 527-3 (Tensile strength CD)	N/mm2	11	25.0 -	42.6	37.6	48.0
DIN EN ISO 527-3 (Tensile strength MD)	N/mm2	11	25.0 -	62.7	58.2	67.8

This material has been produced in compliance with the requirements of applicable specifications unless otherwise noted below. We hereby certify that the results are representative of those contained in the records of the company.

Quality Standard

ISO 9001:2015

Location of the Below Results text

Certificate Approval

Certificate Created By: John B
Name
2021-08-16
Date

- g. Define any "Additional Instructions." This text does not appear on the CoA. This text provides the user creating the CoA with any special instructions (beyond who to send it to and the email/fax for those persons as this information is documented at lower template levels) for delivery of the CoA to the customer. An example of additional delivery instructions might be "The CoA must be included in the bill of lading packet given to the driver before the driver leaves the plant." However, the Master Template does *not* typically contain any additional delivery instructions. If applicable, additional delivery instructions are usually documented at the customer, customer/product family, or customer/product template level.



Verbiage

Below the Header	Above Results
Attention: Quality Department	None
Below Results	Additional Instructions
This material has been produced in compliance with the requirements of the applicable specifications unless otherwise noted herein. We hereby certify that the results are representative of those contained in the company records.	None

Note: When creating a CoA, the image below shows where the user will see the additional instructions:

Create
Certificate of Analysis

Order Numbers

Order Number

2113269

Product Information	Customer Information <input type="button" value="Override Customer"/>
Product Number 01946	Customer Number 0070061437
Product Name BKDPLNFLTBRD120/3.3Z	Customer Name MARKET EXPRESS 365
Product Description	Customer Address 1401 COVENTRY ROAD SURFSIDE BEACH, SC 29575 US
	Customer Order Number
	Customer Product Number

▼ **Instructions**

Give the truck driver a copy of the CoA before the truck departs.

▼ **Units** 158 / 167

h. Click the Save button to save the template.



Chapter 7: Create New Template

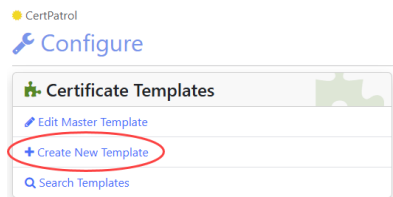
NEW Introduction

As previously outlined, CertPatrol allows CoA templates to be created at the following levels below the Level #6 Master Template:

- a) Level #5: Customer Template
- b) Level #4: Product Group Template
- c) Level #3: Product Template
- d) Level #2: Customer/Product Group Template
- e) Level #1: Customer/Product Template

Create New Customer Template

9. To create a new customer template, click on the Create New Template hyperlink on the CertPatrol Configure page.



- a. Enter the desired customer number and click 'View Template' button.

Create New Template

Customer Number Product Group

or

Product Number

- b. The customer template page will appear. To define the customer's default language (i.e. the language in which CertPatrol will create CoAs for delivery to the customer), click on the 'Edit' button, choose the desired language from the drop-down, and click on Save Changes.

Customer Template

Customer
0070049695 HARRISON CO
324 WEBSTER AVE
CYNTHIANA,
US

Language




- c. To add the customer contacts to whom CoAs need to be sent, click on the 'Add Recipient' button.

Customer Template

Customer
0070049695 HARRISON COUNTY SCHOOL DISTRICT
324 WEBSTER AVE
CYNTHIANA, KY 41031
US

Language (Default) 

Recipients 

- i. Enter the CoA recipient's contact information. Check the applicable checkbox to identify the required CoA delivery method (Email, Fax, or Both). Click on the 'Save' button.

Create New Recipient

First Name:

Last Name:

Title:



Phone Number:

Email:

☒ Required Certificate Delivery Method


Fax Number:

☐ Required Certificate Delivery Method



 

- ii. Repeat the preceding two steps to add another CoA recipient, or click on the 'Edit' or 'Remove' button to edit or remove an existing contact.

Recipients



Bob Smith
QC Supervisor
Email bobsmith@harrisonco.com
Fax [671-295-4020](tel:671-295-4020)
Certificate Contact Method Email

- d. Click on the 'Edit' button to define the certificate contents including the Type, Origin, Display Options, and Verbiage.

Note: The Certificate Contents information is formatted as follows:

Checkbox checked = The information is included in the CoA ("Show").

Bold Font = This information differs from the preceding CoA template (i.e. it is not set to "Inherit").



Certificate Contents

Type *Summary by Unit* Origin *Default Facility* ✎ Edit

Display Options

Manufacturing Information	
<input checked="" type="checkbox"/> <i>Manufacturing Date</i>	Show
<input type="checkbox"/> Order Number	Hide
<input type="checkbox"/> <i>Finished Units</i>	Hide
<input checked="" type="checkbox"/> <i>Customer PO Number</i>	Show
<input checked="" type="checkbox"/> Specification Version Number	Show
<input checked="" type="checkbox"/> <i>Specification Version Date</i>	Show
<input checked="" type="checkbox"/> <i>Shipment Date</i>	Show
<input type="checkbox"/> Input Order Numbers	Hide

- e. Choose the desired CoA Type, Origin, and display state.

Inherit = The show/hide setting is inherited from the previous template (which is the Master Template in the case of a customer-level CoA).

Show = The information will be included on the CoA regardless of the previous template's setting.

Hide = The information will be not included on the CoA regardless of the previous template's setting.

Certificate Contents

Type *Inherited [Summary by Unit]* Origin *Inherit [Default Facility]* Save Changes ✕ Cancel

Display Options

Manufacturing Information	
<i>Manufacturing Date</i>	Inherit [Show]
Order Number	Hide
<i>Finished Units</i>	Inherit [Hide]
<i>Customer PO Number</i>	Inherit [Show]
Specification Version Number	Show
<i>Specification Version Date</i>	Inherit [Show]
<i>Shipment Date</i>	Inherit [Show]
Input Order Numbers	Hide

- f. Choose the verbiage settings (Append or Replace) and, if necessary, enter the new verbiage. By default, the verbiage is inherited from the previous template, and if there is text to inherit, the text is displayed above the “Enter text (Optional)” text box.

Append adds any additional text typed into the “Enter text (Optional)” text box to the end of the inherited text.

Replace disregards the inherited text and replaces it in its entirety with the text typed into the “Enter text (Optional)” text box.



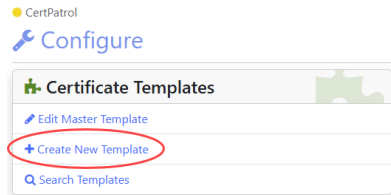
Verbiage

Below the Header <input checked="" type="radio"/> Append <input type="radio"/> Replace Attention: Quality Department Enter text (Optional)	Above Results <input checked="" type="radio"/> Append <input type="radio"/> Replace Enter text (Optional)
Below Results <input checked="" type="radio"/> Append <input type="radio"/> Replace This material has been produced in compliance with the requirements of the applicable specifications unless otherwise noted herein. We hereby certify that the results are representative of those contained in the company records. Enter text (Optional)	Additional Instructions <input type="radio"/> Append <input checked="" type="radio"/> Replace Place a CoA in the bill of lading packet before the shipment leaves the facility.

g. Click on the 'Save Changes' button to save.

Create New Product Group Template

10. To create a new product group template, click on the Create New Template hyperlink on the CertPatrol Configure page.



a. Select the desired product group and click the 'View Template' button.

Create New Template

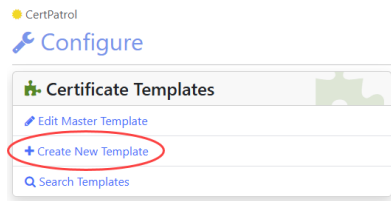
Customer Number	Enter a Customer Number (Optional)	Product Group	PIZZA
		or	
Product Number	Enter a Product Number (Optional)		
View Template			

Note: The product group template page will appear. This template is identical to the customer template, with the exception that CoA Recipients do not apply at this level.

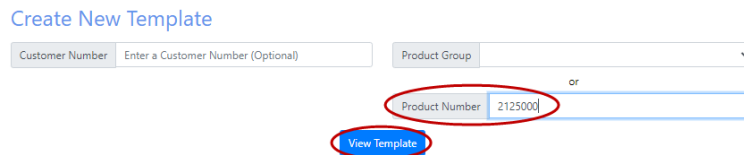
b. See the previous "Create New Customer Template" section for instructions to define the remainder of the product group template.

Create New Product Template

11. To create a new product template, click on the Create New Template hyperlink on the CertPatrol Configure page.

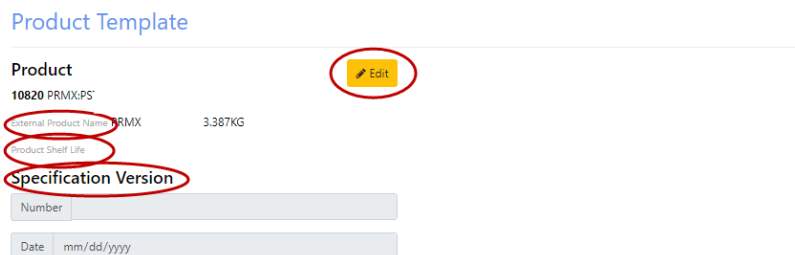


- a. Enter the desired product number and click the 'View Template' button.



Note: The product template page will appear. This template is identical to the product group template, with the following exceptions:

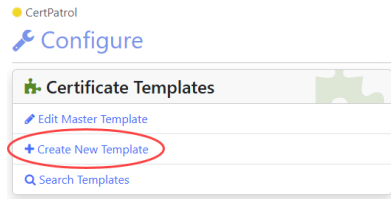
- i. **NEW** If an external product name has been defined, then it is displayed in this UI and the external product name will be used on the CoA instead of the product name.
 - ii. **NEW** If the product shelf life has been defined, then it is displayed in this UI. However, the shelf life is displayed on the CoA only if “Shelf Life” is chosen as “Display” in the display options.
- b. The product template introduces the ability to define an applicable Specification Version number and date. To define the product's Specification Version number and date, click on the 'Edit' button, enter the applicable information, and click on the 'Save' button.



- c. See the previous “Create New Customer Template” section for instructions to define the remainder of the product template.

Create New Customer/Product Group Template

12. To create a new customer/product group template, click on the Create New Template hyperlink on the CertPatrol Configure page.



- a. Enter the desired customer number, select the desired product group, and click 'View Template' button.

Create New Template

Customer Number 0070046965 Product Group PIZZA

or

Product Number Enter a Product Number (Optional)

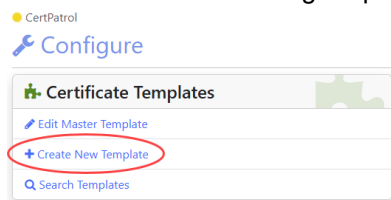
View Template

Note: The customer/product group template page will appear. This template is identical to the customer template, with the exception that the applicable product group information is displayed in the UI.

- b. See the previous "Create New Customer Template" section for instructions to define the remainder of the customer/product group template.

Create New Customer/Product Template

13. To create a customer/product-level template, To create a new customer/product group template, click on the Create New Template hyperlink on the CertPatrol Configure page.



- a. Enter the desired customer number, enter the desired product number, and click 'View Template' button.

Create New Template

Customer Number 0070046965 Product Group

or

Product Number 10820




View Template

Note: The customer/product template page will appear. This template is a combination of the customer template and the product template.



- b. See the previous “Create New Customer Template” section for instructions to define the remainder of the customer/product template.

Customer & Product Template

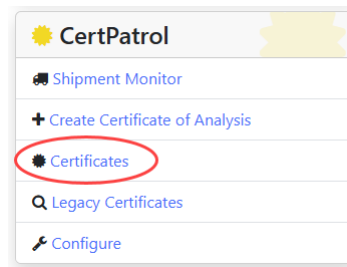
Customer 0070046965 2073 Bodeg Chimeneas 32 Nogales, SON MX <div>Language (Default) </div>	Product  10820 PRMX: External Product Name PRMX 3.387KG Product Shelf Life Specification Version Number Date mm/dd/yyyy
Recipients 	



Chapter 8: Search Certificates

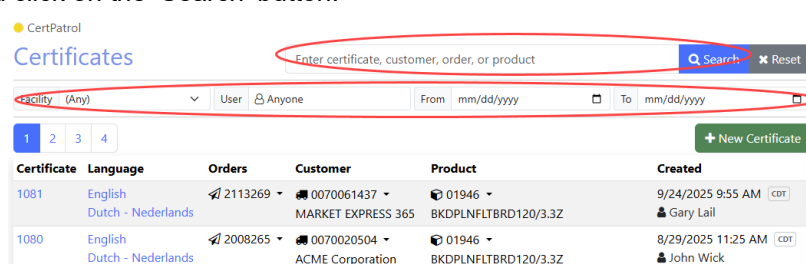
Search for a CoA

14. To view the certificates that have been created, click on the Certificates hyperlink on the PatrolSuite homepage.



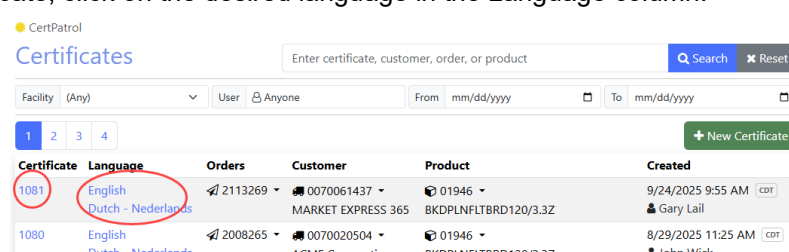
The Search Certificates page will open. This page contains hyperlinks to all saved certificates.

15. To find an existing certificate, enter the certificate number, or customer number, order number, or product number into the search cell and click on the 'Search' button. Alternatively, use the Facility, User, or date range filters and click on the 'Search' button.



16. To open a certificate's information page, click on the certificate number in the Certificate column.

17. To open a certificate, click on the desired language in the Language column.

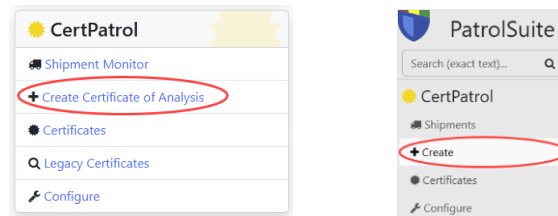




Chapter 9: Create a CoA

Create a New CoA

18. To create a new CoA, click on the “Create Certificate of Analysis” hyperlink on the PatrolSuite homepage. Or click on “+ Create” in the CertPatrol menu.



19. Enter the applicable order number (the manufacturing order or the outbound shipping order) and click the 'Add' button.

NEW Note: If an order contains multiple line items, click on the applicable line item hyperlink.

Order Number/Line Item	Purchase Order Number	Product	Customer	Facility
12345 #1		Better Butter Crème Deluxe	344 Soriana Veracruz Floresta	Arlington
12345 #2	2	Cheesecake NY Strawberry	294 Soriana Veracruz Floresta	Arlington

The Create Certificate page will appear and the product and customer information are displayed.

- a. **NEW** To delete a line item, click on the line item number hyperlink.



- b. To add additional orders, enter the order number and click the 'Add' button.

Note: The additional order numbers must be for the same product as the first order.

- c. For a make-to-stock (MTS) manufacturing process where the actual customer is not known at the time of manufacture, the customer information might not be correct at the time the CoA is created. To change the customer, click on the 'Override Customer' button.

- i. Click on the existing customer in the "Customer Number" field.

- ii. Use the filters to locate the new customer and click on the customer card.



- iii. Enter the Customer Order Number or Customer Product Number if applicable and click the 'Save Changes' button.

Product Information

Product Number
12346

Product Name
Better Butter Crème Deluxe

Shelf Life

Customer Information Save Changes Cancel

Customer Number 0070007999 347 Soriana San Nicolas

Paste

Customer Order Number

Customer Product Number

20. Click on the "Instructions" section label to view any additional instructions regarding creating the CoA and take action as appropriate. .

Instructions

Some Instructions Text 123

Units 152 / 152 ☒ Select All ☐ Select None

Ad Hoc Verbiage

Preview Certificate

21. **NEW** Click on the "Units" section label to view to view the units related to the order(s). Click the Unit checkboxes as desired to select/deselect units. The test results for checked units will be used to create the CoA. The test results for un-checked units will not be used to create the CoA.

NEW Note: If the order number is an outbound shipping order and the ERP or MES is integrated with PatrolSuite to provide the units in the shipping order (i.e. the units that are being loaded onto the truck), then those units will be automatically selected.

NEW Note: If there is not outbound shipping order integration, then the units in the applicable order(s) with an "Approved" quality state type are "selected" by default.

Note: Units that are **not in an approved quality state** type *can* be selected and placed onto a CoA.

Note: Click on the genealogy icon to see the genealogy of a desired unit (assumes that PatrolSuite is integrated with the ERP or MES to provide genealogy data to PatrolSuite).

Instructions

Give the truck driver a copy of the CoA before the truck departs.

Units 157 / 167 ☒ Select All ☐ Select None

Order	Unit	Quality State	Genealogy
2113269	<input type="checkbox"/> 2113269-A	Rejected: Scrap	
2113269	<input type="checkbox"/> 2113269-I	Rejected: Scrap	
2113269	<input type="checkbox"/> 2113269-B	Hold	
2113269	<input type="checkbox"/> 2113269-F	Hold	
2113269	<input type="checkbox"/> 2113269-M	Rework	
2113269	<input checked="" type="checkbox"/> 2113269-190306040854	Approved: OOS Conditions	
2113269	<input checked="" type="checkbox"/> 13269-190306042843	Approved: General Use	
2113269	<input checked="" type="checkbox"/> 2113269-190306042855	Approved: General Use	

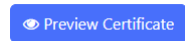


22. Click on the “Ad Hoc Verbiage” section label to expand the contents and to add text content onto the CoA.

Note: Ad hoc verbiage can be added to the CoA in two locations: Below the header or above the analysis results.

Note: If the CoA needs to be produced in multiple languages, then multiple sections will appear for the ad hoc verbiage. The user creating the CoA is responsible for translating any ad hoc text into non-native languages. MAP recommends using Google Translate for this task.

23. Click on the ‘Preview Certificate’ button to preview the CoA prior to creation.



Note: The certificate number is not assigned until the certificate is saved.

Note: The location of the ad hoc text which is shown in the image below.

Note: To preview the certificate in the required languages, click on the language dropdown in the menu bar at the bottom of the page and click on the desired language.

Note: To make additional changes to the certificate, click on the ‘Modify Certificate’ button.

- a. To save the certificate, click on the ‘Save Certificate’ button



MAP Data Systems

Certificate: ?

Certificate of Analysis
Attention Quality Department

Ad hoc text below the header will appear here

Customer Information

Customer Name: 2073 Bodega
Customer Address: Chimeness 320, Nogales, SON 84064, MX

Customer Order Number: 01845
Product Information: 2073 Bodega Nogales Product Number, Rich's Product Number, Rich's Product Name, Product Shelf Life

Manufacturing Information

Manufacturing Date: 2019-03-06
Order Number: 2113269
Input Order Numbers: 617821
Specification Version Number: 2021-04-01

Ad hoc text above the results will appear here

Analysis Results

Test Method	Summary	Units	N	Spec	Avg	Min	Max
SAA-3000-Diameter-X-Finished-Product-L3(ABC)	Dimensions	In	120	6.25 - 7.25	6.94	6.50	7.25
SAA-3000-Diameter-Y-Finished-Product-L3(ABC)	Dimensions	In	120	6.25 - 7.25	6.90	6.50	7.25
SAA-3001-Thickness-Edge-X	Dimensions	In	36	0.16 - 0.26	0.21	0.20	0.23
SAA-3002-Thickness-Edge-Y	Dimensions	In	36	0.16 - 0.26	0.21	0.20	0.24
SAA-4004-Weight-Finished-Product-L3(ABC)	Weights	Oz	120	2.80 - 3.80	3.24	2.98	3.70

This material has been produced in compliance with the requirements of the applicable specifications unless otherwise noted herein. We hereby certify that the results are representative of those contained in the company records.

Quality Standard

This products was produced according to the ISO9001 quality system.

Certificate Approval

Certificate Created By: Christopher, 2021-09-28
Name, Date

Certificate Approved By: Gary
Name, Signature

English, Ad Hoc Results, Modify Certificate, Save Certificate

MAP Data Systems

Certificado: ?

Certificado de Análisis
Attention Quality Department

El texto ad hoc debajo del encabezado aparecerá aquí

Información al Cliente

Nombre del Cliente: 2073 Bodega
Dirección del Cliente: Chimeness 320, Nogales, SON 84064, MX

Número de Pedido del Cliente: 01845
Información del Producto: 2073 Bodega Nogales Número de Producto, Rich's Número de Producto, Rich's Nombre del Producto, Vida útil del Producto

Información de Fabricación

Fecha de fabricación: 2019-03-06
Número de Orden: 2113269
Números de Pedidos Anteriores: 617821
Número de Versión de Especificación: 2021-04-01

El texto ad hoc sobre los resultados aparecerá aquí

Resultados de Análisis

Método de Prueba	Resumen	Unidades	N	Especificación	Promedio	Min	Max
SAA-3000-Diameter-X-Finished-Product-L3(ABC)	Dimensions	In	120	6.25 - 7.25	6.94	6.50	7.25
SAA-3000-Diameter-Y-Finished-Product-L3(ABC)	Dimensions	In	120	6.25 - 7.25	6.90	6.50	7.25
SAA-3001-Thickness-Edge-X	Dimensions	In	36	0.16 - 0.26	0.21	0.20	0.23
SAA-3002-Thickness-Edge-Y	Dimensions	In	36	0.16 - 0.26	0.21	0.20	0.24
SAA-4004-Weight-Finished-Product-L3(ABC)	Weights	Oz	120	2.80 - 3.80	3.24	2.98	3.70

This material has been produced in compliance with the requirements of the applicable specifications unless otherwise noted herein. We hereby certify that the results are representative of those contained in the company records.

Calidad Estandar

This products was produced according to the ISO9001 quality system.

Aprobación del Certificado

Certificado Creado Por: Christopher, 2021-09-28
Nombre, Fecha

Certificado Aprobado Por: Gary
Nombre, Firma

Spanish, Resultados Ad Hoc, Modificar Certificado, Guardar Certificado

Add Test Results

Users in a PatrolSuite Role with the following permission can insert test methods, specifications, and corresponding results into a CoA.

CertPatrol

Test Results - Add

Allow users to add additional test results when creating certificates.

24. To add test results to the CoA, click on the 'Ad Hoc Results' button, then click on the 'New Result' button.

English, Ad Hoc Results, Modify Certificate, Save Certificate

+ New Result

a. Select the Test Property, then select the desired Test Method.



Ad Hoc Test Result Remove Cancel

Test Method

Test Property Color

Test Method Select...

Select...

- ARL-6200-Color
- ARL-6200-Color-a
- ARL-6200-Color-b
- ARL-6200-Color-Bowl
- ARL-6200-Color-L

Changes

b. Enter the applicable results and click the 'Save Changes' button.

Ad Hoc Test Result Remove Cancel

Test Method

Test Property Color

Test Method ARL-6200-Color

Results

Sample Count 0

Fraction Passing 0

Save Changes

Note: The applicable results will change depending on the CoA Type and the data type of the chosen test method:

Ad Hoc Test Result Remove Cancel

Test Method

Test Property Color

Test Method ARL-6200-Color-L

Unit of Measure units

Decimal Places 1

Specification

Target

Lower Specification Limit

Upper Specification Limit

Results

Sample Count 0

Average 0

Minimum

Maximum

Standard Deviation

Save Changes

25. To cancel ad hoc results that have not yet been saved, click the 'Cancel' button.

26. To remove ad hoc results that have been previously saved, click the 'Remove' button.

27. To save the ad hoc results, click the 'Save Changes' button. The test results will appear in the CoA.

28. To edit the ad hoc test result, click on the 'Ad Hoc Results' button and then click on the desired ad hoc test method.

+ New Result

ARL-6200-Color

English


Ad Hoc Results

Modify Certificate

Save Certificate

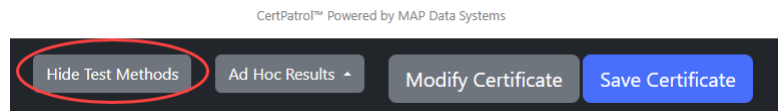


NEW Hide Test Results

 Users in a PatrolSuite Role with the following permission can hide existing test methods, specifications, and corresponding results from appearing on a CoA.

CertPatrol		
<input type="checkbox"/>	Test Results - Add	Allow users to add additional test results when creating certificates.
<input type="checkbox"/>	Create	Allows users to create certificates. Also allows users to ignore certificates in the shipment monitor.
<input type="checkbox"/>	Edit Master Template	Allows users to edit certificate Master Template
<input checked="" type="checkbox"/>	Test Results - Hide	*NEW* Allows users to hide existing test results when creating certificates.

29. To hide results that are on a CoA that has not yet been saved, click the 'Hide Test Methods' button in the CoA preview footer.



a. Check the desired test method(s) and click the 'Save Changes' button.

Hide Test Methods

Allergen

☒ VM 0003 New Test 03

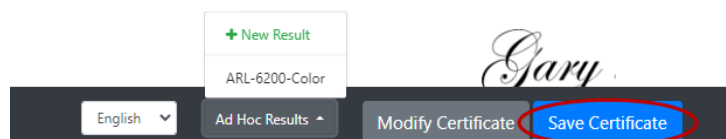
Cheese Batch

☐ VS 11113

Note: This affects the chosen CoA only. It does not change any settings in the applicable CoA template.

Save the Certificate

30. To save the certificate, click on the 'Save Certificate' button. The certificate will be saved as an HTML file within CertPatrol.



a. The certificate information page will be opened. This page displays the certificate number, the customer, product, facility, the CoA recipients and their contact information, any additional instructions, and the user who created the certificate.



Note: The Files frame will contain a hyperlink to the certificate(s) created in the required language(s). Click on the desired language link in the File Frame to open the certificate.

CertPatrol / Certificates / Certificate 1028

Certificate 1028

Customer PRODUCTS CORP	Product BK	20/3.3Z	Facility Santa Ana
---------------------------	---------------	---------	-----------------------

Recipients

Joe Watson
Email: Joe.watson@p.com
Phone: 555-1234
Certificate Delivery Method: Fax

Jane Doe
Email: jane.doe@example.com
Fax: 555-6789

Files

English	23 KB
Spanish	23 KB

Instructions

Some Instructions
Test 123

Created By: Christopher 2021-09-29 6:46 AM (COT)

Print a Certificate

31. To print a certificate, open the desired certificate, right click on the certificate and select “Print...,” select the desired printer, and click on the ‘Print’ button.

Certificate of Analysis
Attention Quality Department

ation

Back Alt+Left Arrow

Forward Alt+Right Arrow

Reload Ctrl+R

iber

Save as... Ctrl+S

ion

Print... Ctrl+P

Cast...

IP Product Number

er

Create QR Code for this page

Information

Translate to Deutsch

View page source Ctrl+U

Inspect

Number

Print 2 sheets of paper

Destination EPSON WF-4630 Serie

Pages All

Copies 1

Layout Portrait

Color Black and white

More settings

Print

Save a Certificate as PDF

32. To save the certificate as a .pdf file, open the desired certificate, right click on the certificate and select “Print...,” select Destination “Save as PDF,” click on the ‘Print’ button, and choose the folder in which to save the PDF file.



Certificate of Analysis
Attention Quality Department

ation

Back Alt+Left Arrow
Forward Alt+Right Arrow
Reload Ctrl+R

iber

Save as... Ctrl+S
Print... Ctrl+P
Cast...

ion

IP Product Number
er

Create QR Code for this page

ifformation

Translate to Deutsch
View page source Ctrl+U
Inspect

Number

Print 2 pages

Destination

Save as PDF
EPSON WF-4630 Series
Save as PDF
See more...

Pages

Layout Portrait

More settings

Print

Email a Certificate

33. To Email the saved PDF certificate to all of the Recipients, open the desired certificate's information page, and click on the 'Email' hyperlink on the Certificate Info page.
- a. The user's email client will be opened with the recipient(s) pre-populated in the 'To' address. Attach the PDF file saved in the previous step and send the email.

CertPatrol / Certificates / Certificate 1028

Certificate 1028

Customer
PRODUCTS CORP

Product
BK 20/3.3Z

Facility
Santa Ana

Recipients

Email

Joe Watson
Email Joe.watson@p.com
Phone 555-1234
Certificate Delivery Method Fax

Jane Doe
Email jane.doe@example.com
Fax 555-6789

Files

English 23 KB

Spanish 23 KB

Instructions

Some Instructions
Test 123

Created By
Christopher

2021-09-29 6:46 AM



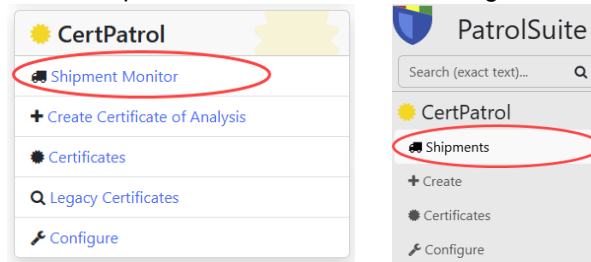
Chapter 10: Shipment Monitor

NEW Integration

If PatrolSuite is integrated with the local ERP or MES to obtain outbound shipping order data, Shipment Monitor will list shopping orders that require a CoA and the orders for which a CoA has already been created. Contact MAP to obtain a quote for integration with the ERP or MES to obtain outbound shipping order data and activate Shipment Monitor.

Shipments without Certificates

34. To open Shipment Monitor, click on the Shipment Monitor hyperlink on the CertPatrol card on the PatrolSuite homepage, or click “Shipments” on the CertPatrol navigation menu.



The **Shipments without Certificates** page will open. This page displays outbound shipments that require a certificate, but no certificate has been created.

- a. Select a desired facility, and/or enter a desired customer, product, or order number and click on the ‘Search’ button to filter the list.

Note: The date of the most recent shipment appears at the top of the list. This date can be weeks or months into the future if the shipment is scheduled to be shipped in the future.

Note: That the facility name will be displayed if the facility has a PatrolSuite license and is accordingly defined within PatrolSuite. If a facility does not have a PatrolSuite license and is not defined within PatrolSuite, the then facility number (as passed to PatrolSuite via the integration with the ERP or MES) will be displayed (see the first and third line items with facility 7248 in the image below).



CertPatrol

Shipments without Certificates

+ New Certificate

Facility: (Any) Enter customer, product, or order Search Reset

Shipments without Certificates Recent Shipments All Shipments

Date	Facility	Order	Customer	Product	Certificate
2022-03-03 CST	7248	1020-120620023127	0070020504 RIVER DAIRY PRODUCTS CORP	2005494	+ Create - Ignore
2022-03-01 CST	CrestHill	0080002945	0070023500 COLD STONE CREAMERY INT'L LLC	2001630	+ Create - Ignore
2022-03-03 CST	7248	0080001177-2005638	73285 PUBLIX #0617 WATKINSVILLE - CF	2005638	+ Create - Ignore

35. To create a certificate from Shipment Monitor, click the Create button.

36. If a certificate is not required, then click the Ignore button. Enter an explanation why the certificate is not required in the Comment field.

Note: Certificates are typically ignored for two reasons:

- The certificate was created outside of CertPatrol and was already sent to the customer.
- The customer does not require a certificate for the applicable product. **If a certificate is not required for this reason, then create a CoA template for the product/customer and set the "Is a certificate required for this template?" setting to 'No.'** Otherwise, users will continue to be prompted to create certificates that are not required.

CertPatrol

Shipments without Certificates

+ New Certificate

Facility: (Any) Enter customer, product, or order Search Reset

Shipments without Certificates Recent Shipments All Shipments

Date	Facility	Order	Customer	Product	Certificate
2022-03-03 CST	7248	1020-120620023127	0070020504 RIVER DAIRY PRODUCTS CORP	2005494	+ Create - Ignore
2022-03-01 CST	CrestHill	0080002945	0070023500 COLD STONE CREAMERY INT'L LLC	2001630	+ Create - Ignore
2022-03-03 CST	7248	0080001177-2005638	73285 PUBLIX #0617 WATKINSVILLE - CF	2005638	+ Create - Ignore

Recent Shipments

37. To view shipments that have created within the last 24 hours (or as otherwise defined by the system administrator), click on the Recent Shipments tab.

- Click on the certificate number to view the corresponding certificate.



CertPatrol

Recent Shipments

[+ New Certificate](#)

Facility: (Any) [Search](#) [Reset](#)

[Shipments without Certificates](#) [Recent Shipments](#) [All Shipments](#)

Date	Facility	Order	Customer	Product	Certificate
2022-04-24 <small>(CST)</small>	CrestHill	2113269	0070020504 RIVER DAIRY PRODUCTS CORP	01946	1029 2022-03-22 <small>(CST)</small> John Telford

All Shipments

38. To view all shipments, click on the All Shipments tab. The purpose of this page is to enable a user to locate a shipment more than 24 hours ago that was incorrectly ignored.

- Click on the un-ignore icon to enable a certificate to be created.

CertPatrol

All Shipments

[+ New Certificate](#)

Facility: (Any) [Search](#) [Reset](#)

[Shipments without Certificates](#) [Recent Shipments](#) [All Shipments](#)

Date	Facility	Order	Customer	Product	Certificate
2022-04-24 <small>(CST)</small>	CrestHill	2113269	0070020504 RIVER DAIRY PRODUCTS CORP	01946	1029 2022-03-22 <small>(CST)</small> John
2022-03-03 <small>(CST)</small>	7248	1020-120620023127	0070020504 RIVER DAIRY PRODUCTS CORP	2005494	+ Create - Ignore
2022-03-01 <small>(CST)</small>	CrestHill	0080002945	0070023500 COLD STONE CREAMERY INT'L LLC	2001630	+ Create - Ignore
2022-03-07 <small>(CST)</small>	7450	0080001182	73284 KINGS SUPERMARKET***KISSIMMEE - CF	2003795	Ignored 4 days ago John
2022-03-03 <small>(CST)</small>	7248	0080001177-2005638	73285 PUBLIX #0617 WATKINSVILLE - CF	2005638	+ Create - Ignore



NEW Chapter 11: Legacy Certificates

Integration

The Legacy Certificates feature enables customers who created CoAs using QDMS (the predecessor to PatrolSuite) to access those certificates. Contact MAP if you would like a quote to access legacy certificates from PatrolSuite.