

# QualityPatrol – Configure

## User Guide

Version 2026-04



**QualityPatrol**

- Dashboard
- Samples & Testing
  - + Add Sample
  - Samples
    - Incomplete Samples
    - Awaiting Quality State
- Nonconforming Product
  - + New Nonconformance
  - Nonconformance Records
  - NCP Dashboard
- Quality State Management
- Quality Plans
- Specifications
- Configure

QualityPatrol  
**Configure**

- Archiving**  
Define the configuration settings for the PatrolSuite Archiving Engine (separate license required).
- Operations**  
Define the steps of the manufacturing process where testing is performed.
- Quality States**  
Define the rules for how samples can be processed.
- Quality Plans & Specs**  
Define what tests need to be completed when a raw material is received or a product is made, and the corresponding specifications.  
[Quality Plans & Specs](#)  
[Quality Plan Statuses](#)
- Sample Locations**  
Define the physical location on a sample where which tests or measurements must be made for VMI (x-bar) testing.
- Sample Frequencies**  
Define how often samples can be taken for quality inspection.
- Test Properties**  
Define the groups into which test methods are organized.
- Test Methods**  
Define the product tests that can be performed and the process conditions that can be measured.

QualityPatrol

**Quality Plans**

Search quality plans

Status	Active	Facility	Any
Product Group	Any	Operation	Any
Product	<input type="text" value="Enter name or number..."/>	Test Method	<input type="text" value="Enter name or number..."/>
Business Partner	<input type="text" value="Enter name or number..."/>		

1 2 3 4 5 6 7 ... 874 Page

Product	Operation	Business Partner
12346 Better Butter Crème Deluxe TCCS-BETTERCREME	ARI - BIB	

**Quality Plan** 12346 - ARI - BIB Active

Product: 12346 Better Butter Crème Deluxe  
 Operation: ARI - BIB  
 Customer: Any  
 Shelf Life: [ ]

Quality Plan Status: ● Approved - Commercialized  
 Comments: test comment

History Edit Clone Delete

Related Quality Plans 0

[Test Methods](#) [Specifications](#) [Frequencies](#) [Locations](#) [Monitoring](#) [Sources](#) [Calculations](#) [Rules](#)

**Quality Plan Calculations**










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# Chapter 1: Introduction

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## Introduction

QualityPatrol™ is a PatrolSuite module that facilitates:


- The definition of the product quality plan, including process conditions and product testing requirements and the corresponding targets and specifications. In regulated industries such as medical devices, this is the design transfer step from the device master record (DMR) to manufacturing.
- The capture and storage of the information required by the quality plan (e.g. the test results) and the subsequent determination of the product's quality state. In regulated industries such as medical devices, this is the device history record (DHR).

This user guide covers the quality system configuration tasks, except for the product quality plan and specifications which are covered in a separate user guide.

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## 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.

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## 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.

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## Definitions

**Business Partner** – Customers and Suppliers.

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

**Comprehensive Testing** – If an administrator has turned comprehensive testing “on” for a given test

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location, then all test results must be recorded before the user is allowed to save/close the edit test results window. This feature can be used to help ensure that all tests are performed as required.

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

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

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

**Currency** – A system of money in common use within a particular country or economic region, used as a medium of exchange, store of value, and unit of account in financial transactions.

**Defect** – Flaws, faults, or deviations in a manufactured item that prevent it from meeting design specifications, quality standards, or customer expectations.

**Defect Category** – Grouping of defects to help identify, analyze, and correct issues systematically. Common defect categories include:

- Aesthetic or Cosmetic Defects - Visual imperfections that do not affect the product’s functionality but can impact customer perception and marketability.
- Design Defects - Flaws inherent in the product's design that make it unsafe, ineffective, or prone to failure, even if manufactured perfectly.
- Documentation/Labeling Defects - Inaccurate or missing product information, which may lead to misuse, safety issues, or regulatory non-compliance.
- Functional Defects - The product does not perform as intended or fails under specific conditions.
- Manufacturing Defects - Flaws introduced during the production or assembly process, even when the design is correct.
- Material Defects - Deficiencies in raw materials or components that affect product performance, safety, or durability.
- Packaging Defects - Issues related to how the product is packaged for shipping, storage, or display.
- Process Defects - Defects caused by errors in the manufacturing process settings, procedures, or conditions.

**Department** – An organized unit within a company that is responsible for managing a specific set of functions, processes, or activities that contribute to the organization’s overall goals and operations.

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

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**Enterprise Resource Planning (ERP)** – Software system that enables management of the day-to-day business activities such as accounting/finance, procurement, supply chain, human resources, sales order conversion to manufacturing orders, distribution, project management, compliance, and others.

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

**Manufacturing Execution System (MES)** – Software system that tracks and documents the transformation of raw materials into finished goods, including inventory consumption and product genealogy. In a world class manufacturing environment, the MES is integrated to communicate bi-directionally with the ERP and the Quality System (PatrolSuite).

**Market** (“Customer Market”) – Groups of consumers that a company targets to sell its products or services, based on shared needs, characteristics, or behaviors. These markets help companies focus their marketing, product development, and sales strategies by understanding who their customers are and what they need.

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

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

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

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

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

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

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

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

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

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

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

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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.

**Reasonable Data Limit (RDL)** – The range in which all test results would normally be expected to fall. If an RDL is defined, and a test result is entered that exceeds the RDL, the user will get a warning message.

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

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

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

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

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

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

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

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

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

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

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

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

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**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.

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## Symbol Key

The following symbols are used in this user guide.

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

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# Chapter 2: Security

## 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.



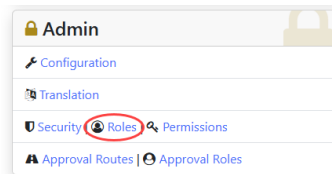
In summary, the process of defining user security in PatrolSuite is as follows:

- 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.



**Note:** MAP recommends creating the following QualityPatrol Roles:

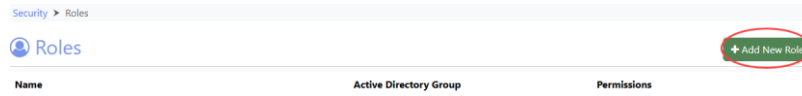
QualityPatrol Admin	26	<a href="#">Active</a>
QualityPatrol Dashboard	1	<a href="#">Active</a>
QualityPatrol Manager	40	<a href="#">Active</a>
QualityPatrol User - Laboratory	13	<a href="#">Active</a>
QualityPatrol User - Manufacturing	8	<a href="#">Active</a>
QualityPatrol Viewer	1	<a href="#">Active</a>

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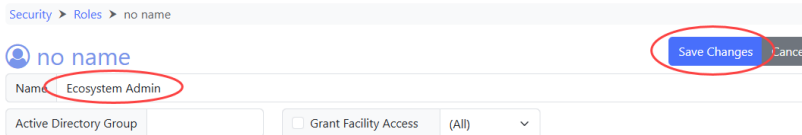
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2. To create a Role, click on the 'Add New Role' button.



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



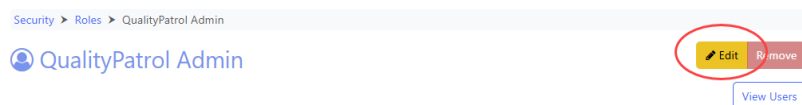
**Note:** Each PatrolSuite Role must be associated with a Microsoft Active Directory group.

3. To associate a PatrolSuite Role with an Active Directory group:

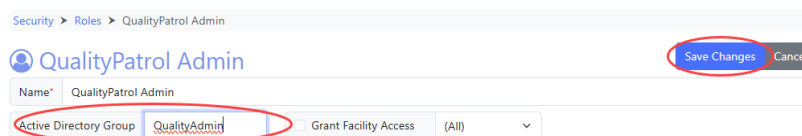
- a. Contact your IT department and ask them to create an Active Directory group for the PatrolSuite Role. The Active Directory group name is typically the same as the PatrolSuite Role name.
- b. Provide the IT department with the names of all users who need to be added into each Active Directory group.
- c. Click on the desired Role name.

QualityPatrol Admin	26	Active
QualityPatrol Dashboard	1	Active
QualityPatrol Manager	40	Active
QualityPatrol User - Laboratory	13	Active
QualityPatrol User - Manufacturing	8	Active
QualityPatrol Viewer	1	Active

d. Click on the 'Edit' button.



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



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

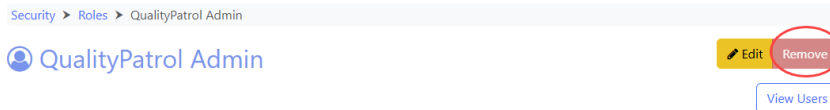
4. To see the users who are in the Active Directory group associated with the Role, click the 'View Users' button.



5. To remove a PatrolSuite role, click the 'Remove' button and click the 'Remove' button in the confirmation window.



**Note:** The 'Remove' button will not be actionable until all permissions are set to "no."



## NEW Permissions

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

6. To grant permissions to a PatrolSuite Role, click on the desired Role name.

QualityPatrol Admin	26	Active
QualityPatrol Dashboard	1	Active
QualityPatrol Manager	40	Active

- a. Scroll down to the QualityPatrol 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 **QualityPatrol Admin** Role is typically granted the following permissions:

QualityPatrol		
<input type="checkbox"/>	Admin	Allows users to edit quality configuration settings.
<input type="checkbox"/>	Dashboard	Allows users to view the QualityPatrol dashboard.
<input type="checkbox"/>	Manage Attribute Options	Allows users to manage the global list of choices for attribute test methods.
<input type="checkbox"/>	Manage Frequencies	Allows users to configure frequencies.
<input type="checkbox"/>	Manage Operations	Allows users to configure operations.
<input type="checkbox"/>	Manage Quality Plan Statuses	Allows users to configure the quality plan statuses.
<input type="checkbox"/>	Manage Quality Plans	Allows users to configure quality plans.
<input type="checkbox"/>	Manage Quality States	Allows users to configure quality states.
<input type="checkbox"/>	Manage Sample Locations	Allows users to configure sample locations.
<input type="checkbox"/>	Manage Specifications	Allows users to configure specifications.
<input type="checkbox"/>	Manage Test Methods	Allows users to configure test methods.
<input type="checkbox"/>	Manage Test Properties	Allows users to configure test properties.
<input type="checkbox"/>	Manage Test Sources	Allows users to configure test sources.
<input type="checkbox"/>	Modify Completed Sample	By default, users cannot edit test results once all testing is completed. This permission allows users to edit test results for completed samples provided that the user also has the corresponding permission to rerun a test, to add a new test, to enter/edit test results, to delete sample locations (VMI test methods), or to delete the sample.
<input type="checkbox"/>	Quality State Assign Complete	Allows users to assign an initial quality state to a completed sample.
<input type="checkbox"/>	Quality State Assign Incomplete	Allows users to assign an initial quality state to an incomplete sample.
<input type="checkbox"/>	Quality State Edit	Allows users to edit a previously assigned quality state. Also allows users to edit quality states via the 'Samples' tab of the Quality State Management page.
<input type="checkbox"/>	Sample Add	Allows users to add a new sample and to delete a sample without test results.
<input type="checkbox"/>	Sample Add Test	Allows users to add a test to a sample.
<input type="checkbox"/>	Sample Delete	Allows users to delete a sample with test results.
<input type="checkbox"/>	Sample Delete Test	Allows users to delete a test, including required tests.
<input type="checkbox"/>	Sample Edit Date	<input type="checkbox"/> Allows users to change the date/time of a sample.
<input type="checkbox"/>	Sample Edit Genealogy	Allows users to edit the sample genealogy (consumed units).
<input type="checkbox"/>	Sample Ignore Test	<input type="checkbox"/> Allows users to ignore a test method that has not and will not be completed. QualityPatrol will process samples with ignored test methods as if the test methods were not required.
<input type="checkbox"/>	MES Code Edit	Allows users to edit the manufacturing system code for selected units via the 'Units' tab of the Quality State Management page.
<input type="checkbox"/>	Test Delete Sample Location	Allows users to delete a sample location from a variable multi input test method.
<input type="checkbox"/>	Test Edit Results	Allows users to enter test results, to add attachments, and to edit all results and comments.
<input type="checkbox"/>	Test Enter Results	Allows users to enter test results, to add attachments, and to edit their own results and comments.
<input type="checkbox"/>	Test Re-run	Allows users to re-run a test.
<input type="checkbox"/>	View	Allows users to view all QualityPatrol pages.

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The **QualityPatrol Dashboard** Role is typically granted only the following permission:

QualityPatrol		
<input type="radio"/>	Admin	Allows users to edit quality configuration settings.
<input checked="" type="radio"/>	Dashboard	Allows users to view the QualityPatrol dashboard.

The **QualityPatrol Manager** Role is typically granted the following permissions:

QualityPatrol		
<input type="radio"/>	Admin	Allows users to edit quality configuration settings.
<input checked="" type="radio"/>	Dashboard	Allows users to view the QualityPatrol dashboard.
<input checked="" type="radio"/>	Manage Attribute Options	Allows users to manage the global list of choices for attribute test methods.
<input checked="" type="radio"/>	Manage Frequencies	Allows users to configure frequencies.
<input checked="" type="radio"/>	Manage Operations	Allows users to configure operations.
<input checked="" type="radio"/>	Manage Quality Plan Statuses	Allows users to configure the quality plan statuses.
<input checked="" type="radio"/>	Manage Quality Plans	Allows users to configure quality plans.
<input type="radio"/>	Manage Quality States	Allows users to configure quality states.
<input checked="" type="radio"/>	Manage Sample Locations	Allows users to configure sample locations.
<input type="radio"/>	Manage Specifications	Allows users to configure specifications.
<input checked="" type="radio"/>	Manage Test Methods	Allows users to configure test methods.
<input checked="" type="radio"/>	Manage Test Properties	Allows users to configure test properties.
<input checked="" type="radio"/>	Manage Test Sources	Allows users to configure test sources.
<input checked="" type="radio"/>	Modify Completed Sample	By default, users cannot edit test results once all testing is completed. This permission allows users to edit test results for completed samples provided that the user also has the corresponding permission to rerun a test, to add a new test, to enter/edit test results, to delete sample locations (VMI test methods), or to delete the sample.
<input checked="" type="radio"/>	Quality State Assign Complete	Allows users to assign an initial quality state to a completed sample.
<input checked="" type="radio"/>	Quality State Assign Incomplete	Allows users to assign an initial quality state to an incomplete sample.
<input checked="" type="radio"/>	Quality State Edit	Allows users to edit a previously assigned quality state. Also allows users to edit quality states via the 'Samples' tab of the Quality State Management page.
<input checked="" type="radio"/>	Sample Add	Allows users to add a new sample and to delete a sample without test results.
<input checked="" type="radio"/>	Sample Add Test	Allows users to add a test to a sample.
<input checked="" type="radio"/>	Sample Delete	Allows users to delete a sample with test results.
<input checked="" type="radio"/>	Sample Delete Test	Allows users to delete a test, including required tests.
<input checked="" type="radio"/>	Sample Edit Date	<input checked="" type="checkbox"/> Allows users to change the date/time of a sample.
<input checked="" type="radio"/>	Sample Edit Genealogy	Allows users to edit the sample genealogy (consumed units).
<input checked="" type="radio"/>	Sample Ignore Test	<input checked="" type="checkbox"/> Allows users to ignore a test method that has not and will not be completed. QualityPatrol will process samples with ignored test methods as if the test methods were not required.
<input checked="" type="radio"/>	MES Code Edit	Allows users to edit the manufacturing system code for selected units via the 'Units' tab of the Quality State Management page.
<input checked="" type="radio"/>	Test Delete Sample Location	Allows users to delete a sample location from a variable multi input test method.
<input checked="" type="radio"/>	Test Edit Results	Allows users to enter test results, to add attachments, and to edit all results and comments.
<input checked="" type="radio"/>	Test Enter Results	Allows users to enter test results, to add attachments, and to edit their own results and comments.
<input checked="" type="radio"/>	Test Re-run	Allows users to re-run a test.
<input checked="" type="radio"/>	View	Allows users to view all QualityPatrol pages.

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The **QualityPatrol User - Laboratory** Role is for technicians in the laboratory and is typically granted the following permissions:

QualityPatrol		
No	Admin	Allows users to edit quality configuration settings.
Yes	Dashboard	Allows users to view the QualityPatrol dashboard.
No	Manage Attribute Options	Allows users to manage the global list of choices for attribute test methods.
No	Manage Frequencies	Allows users to configure frequencies.
No	Manage Operations	Allows users to configure operations.
No	Manage Quality Plan Statuses	Allows users to configure the quality plan statuses.
No	Manage Quality Plans	Allows users to configure quality plans.
No	Manage Quality States	Allows users to configure quality states.
No	Manage Sample Locations	Allows users to configure sample locations.
No	Manage Specifications	Allows users to configure specifications.
No	Manage Test Methods	Allows users to configure test methods.
No	Manage Test Properties	Allows users to configure test properties.
No	Manage Test Sources	Allows users to configure test sources.
Yes	Modify Completed Sample	By default, users cannot edit test results once all testing is completed. This permission allows users to edit test results for completed samples provided that the user also has the corresponding permission to rerun a test, to add a new test, to enter/edit test results, to delete sample locations (VMI test methods), or to delete the sample.
No	Quality State Assign Complete	Allows users to assign an initial quality state to a completed sample.
No	Quality State Assign Incomplete	Allows users to assign an initial quality state to an incomplete sample.
No	Quality State Edit	Allows users to edit a previously assigned quality state. Also allows users to edit quality states via the 'Samples' tab of the Quality State Management page.
Yes	Sample Add	Allows users to add a new sample and to delete a sample without test results.
Yes	Sample Add Test	Allows users to add a test to a sample.
No	Sample Delete	Allows users to delete a sample with test results.
No	Sample Delete Test	Allows users to delete a test, including required tests.
Yes	Sample Edit Date	Allows users to change the date/time of a sample.
Yes	Sample Edit Genealogy	Allows users to edit the sample genealogy (consumed units).
No	Sample Ignore Test	Allows users to ignore a test method that has not and will not be completed. QualityPatrol will process samples with ignored test methods as if the test methods were not required.
No	MES Code Edit	Allows users to edit the manufacturing system code for selected units via the 'Units' tab of the Quality State Management page.
Yes	Test Delete Sample Location	Allows users to delete a sample location from a variable multi input test method.
No	Test Edit Results	Allows users to enter test results, to add attachments, and to edit all results and comments.
Yes	Test Enter Results	Allows users to enter test results, to add attachments, and to edit their own results and comments.
Yes	Test Re-run	Allows users to re-run a test.
Yes	View	Allows users to view all QualityPatrol pages.

# QualityPatrol – Configure

## User Guide

Version 2026-04



The **QualityPatrol User – Shop Floor Role** is for manufacturing operators and is typically granted the following permissions:

QualityPatrol		
No	Admin	Allows users to edit quality configuration settings.
No	Dashboard	Allows users to view the QualityPatrol dashboard.
No	Manage Attribute Options	Allows users to manage the global list of choices for attribute test methods.
No	Manage Frequencies	Allows users to configure frequencies.
No	Manage Operations	Allows users to configure operations.
No	Manage Quality Plan Statuses	Allows users to configure the quality plan statuses.
No	Manage Quality Plans	Allows users to configure quality plans.
No	Manage Quality States	Allows users to configure quality states.
No	Manage Sample Locations	Allows users to configure sample locations.
No	Manage Specifications	Allows users to configure specifications.
No	Manage Test Methods	Allows users to configure test methods.
No	Manage Test Properties	Allows users to configure test properties.
No	Manage Test Sources	Allows users to configure test sources.
Yes	Modify Completed Sample	By default, users cannot edit test results once all testing is completed. This permission allows users to edit test results for completed samples provided that the user also has the corresponding permission to rerun a test, to add a new test, to enter/edit test results, to delete sample locations (VMI test methods), or to delete the sample.
No	Quality State Assign Complete	Allows users to assign an initial quality state to a completed sample.
No	Quality State Assign Incomplete	Allows users to assign an initial quality state to an incomplete sample.
No	Quality State Edit	Allows users to edit a previously assigned quality state. Also allows users to edit quality states via the 'Samples' tab of the Quality State Management page.
Yes	Sample Add	Allows users to add a new sample and to delete a sample without test results.
Yes	Sample Add Test	Allows users to add a test to a sample.
No	Sample Delete	Allows users to delete a sample with test results.
No	Sample Delete Test	Allows users to delete a test, including required tests.
Yes	Sample Edit Date	Allows users to change the date/time of a sample.
Yes	Sample Edit Genealogy	Allows users to edit the sample genealogy (consumed units).
No	Sample Ignore Test	Allows users to ignore a test method that has not and will not be completed. QualityPatrol will process samples with ignored test methods as if the test methods were not required.
No	MES Code Edit	Allows users to edit the manufacturing system code for selected units via the 'Units' tab of the Quality State Management page.
Yes	Test Delete Sample Location	Allows users to delete a sample location from a variable multi input test method.
No	Test Edit Results	Allows users to enter test results, to add attachments, and to edit all results and comments.
Yes	Test Enter Results	Allows users to enter test results, to add attachments, and to edit their own results and comments.
Yes	Test Re-run	Allows users to re-run a test.
Yes	View	Allows users to view all QualityPatrol pages.

The **QualityPatrol Viewer Role** is typically granted only the following permission:

QualityPatrol		
Yes	View	Allows users to view all QualityPatrol pages.



# Chapter 3: Configuration

## Introduction

The QualityPatrol configuration pages enable PatrolSuite administrators to define the information and rules that will govern the quality process.

QualityPatrol configuration settings are located on Page: {PatrolSuite URL}/Quality/Setup

Users with the following permission can edit all QualityPatrol/Configure pages.

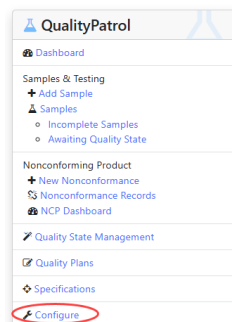
QualityPatrol		
<b>Yes</b>	Admin	Allows users to edit quality configuration settings

Users with the following permission can view QualityPatrol and its related pages, including the Configure pages.

<b>Yes</b>	View	Allows users to view the QualityPatrol frame on the PatrolSuite homepage and to view related information.
------------	------	---

## View

- To view a QualityPatrol configuration page, click on the QualityPatrol Configure link on the PatrolSuite homepage.



- The configuration menu page will appear. Click on the desired topic. Keep in mind that the ability to view and edit configuration topics is dependent on a user's roles and permissions.



QualityPatrol

### Configure

<h4>Attribute Options</h4> <p>Define the attribute options that can be assigned to Test Properties and to Attribute Test Methods.</p>	<h4>Archiving</h4> <p>Define the configuration settings for the PatrolSuite Archiving Engine (separate license required).</p>
<h4>Operations</h4> <p>Define the steps of the manufacturing process where testing is performed.</p>	<h4>Quality States</h4> <p>Define the rules for how samples can be processed.</p>
<h4>Quality Plans &amp; Specs</h4> <p>Define what tests need to be completed when a raw material is received or a product is made, and the corresponding specifications.</p> <p><a href="#">Quality Plans &amp; Specs</a> <a href="#">Quality Plan Statuses</a></p>	<h4>Sample Locations</h4> <p>Define the physical location on a sample where which tests or measurements must be made for VMI (x-bar) testing.</p>
<h4>Sample Frequencies</h4> <p>Define how often samples can be taken for quality inspection.</p>	<h4>Specifications</h4> <p>Define the product and process specifications.</p>
<h4>Test Properties</h4> <p>Define the groups into which test methods are organized.</p>	<h4>Test Methods</h4> <p>Define the product tests that can be performed and the process conditions that can be measured.</p>
<h4>Test Sources</h4> <p>Define who requires that specific testing be performed.</p>	<h4>Nonconformance Categories</h4> <p>Define the nonconformance Categories and Triggers that can be applied to nonconformance records.</p> <p><a href="#">Nonconformance Categories</a> <a href="#">Nonconformance Triggers</a></p>



## **NEW** Chapter 4: Attribute Options

### **NEW** Introduction

The Attribute Option pages enable the definition and management of the global list of attribute options that may be consumed by an attribute test method.

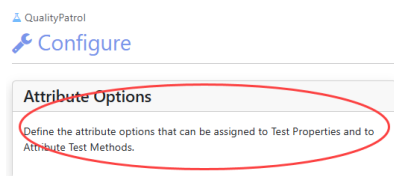
The attribute options are located on Page: {PatrolSuite URL}/ Quality/Setup/AttributeOptions

Users with the following permission can edit the QualityPatrol/Configure/Attribute Options page.

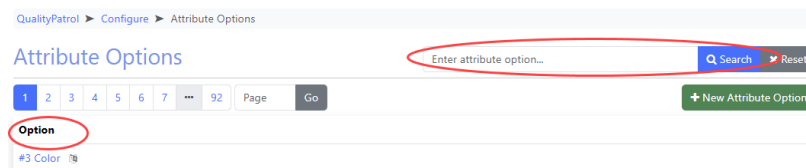
QualityPatrol		
<input type="radio"/>	Admin	Allows users to edit quality configuration settings.
<input type="radio"/>	Dashboard	Allows users to view the QualityPatrol dashboard.
<input checked="" type="radio"/>	Manage Attribute Options	Allows users to manage the global list of choices for attribute test methods.

### **NEW** View Existing Options

8. To view existing attribute options, click on the Attribute Options card on the QualityPatrol/Configure page.

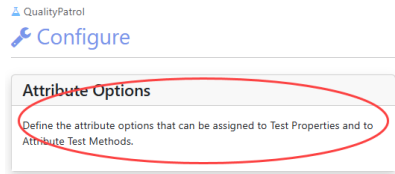


a. Use the Search feature to find an attribute option of interest or click the column heading to sort the options.

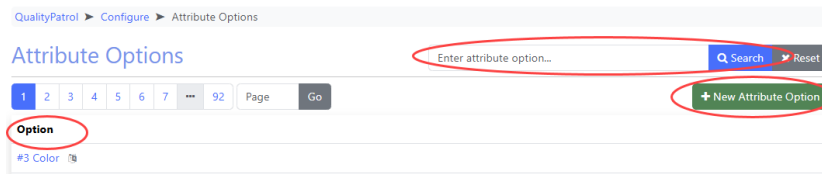


### **NEW** Add New Attribute Option

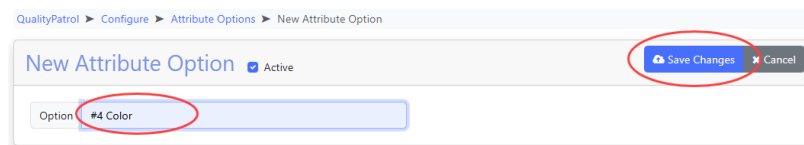
9. To add a new attribute option, click on the Attribute Options card on the QualityPatrol/Configure page.



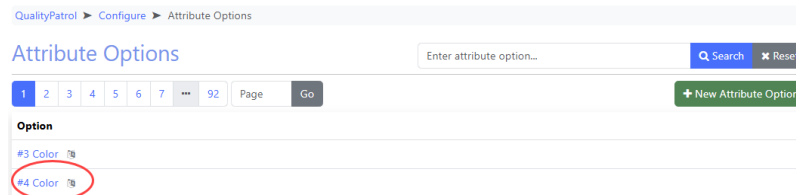
- a. Use the Search and the column heading sort feature to confirm that the attribute of interest option does not already exist. If it does not exist, click the 'New Attribute Option' button.



- b. Enter the attribute option name and click 'Save Changes.'

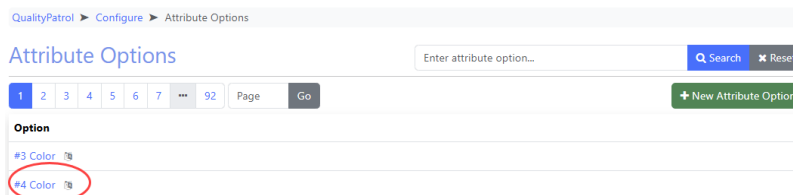


The new attribute option will appear in the list.

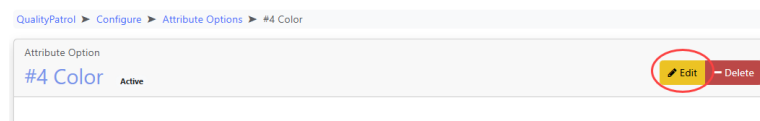


## **NEW** Edit

10. To edit an existing attribute option, click on the Attribute Options card on the QualityPatrol/Configure page, use the Search feature to find an attribute option of interest, and click on the option name.



- a. Click the 'Edit' button.





- b. Edit the option name as desired and click 'Save Changes.'

QualityPatrol > Configure > Attribute Options > #4 Color

Attribute Option  
#4 Color  Active

Option #4 Color

Save Changes Cancel

11. To delete an existing attribute option, click on the option name and click the 'Delete' button.

QualityPatrol > Configure > Attribute Options > #4 Color

Attribute Option  
#4 Color Active

Edit Delete

12. In the confirmation window, click the 'Delete' button.

Confirm Attribute Option

Are you sure you want to delete this attribute option?

Delete Cancel

## NEW Localize

13. To localize an existing attribute option, click on the localization icon next to the attribute option of interest.

QualityPatrol > Configure > Attribute Options

Attribute Options

Enter attribute option... Search Reset

1 2 3 4 5 6 7 ... 92 Page Go

+ New Attribute Option

Option

#3 Color

#4 Color

- a. Click the 'Edit' button.

Text Translation

Source Text  
#4 Color

This text has not been translated.

Edit

- b. Enter the translated names and click 'Save Changes.'

Edit Data Translation

Source Text  
#4 Color

Language	Text
Chinese - 中国人	#4 颜色
Dutch - Nederlands	#4 Kleur

Save Changes Cancel



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# Chapter 5: Archiving

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## Introduction

The Archiving Engine (licensed separately) automatically moves old data from the production database to an archive database on a defined frequency. This helps maximize the performance of the production system.

The archiving configuration settings are located on Page: {PatrolSuite URL}/Archiving

 Users with the following permission can edit the QualityPatrol/Configure/Archiving page.

### Archiving

 Manage

Allows users to view the QualityPatrol / Archiving hyperlink on the PatrolSuite homepage and edit the Archiving Engine settings.

 Users with the following permission can view the QualityPatrol/Configure/Archiving page.

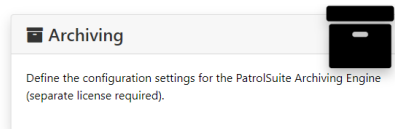
 View

Allows users to view the QualityPatrol/Archiving hyperlink on the PatrolSuite homepage and view the Archiving Engine settings.

---

## View

14. To view the Archiving configuration settings, click on the Archiving card.



**Note:** The amount of testing determines whether the Archiving engine is necessary. Contact MAP to discuss the potential benefits of archiving production data.

**Note:** Access to the feature is typically granted only to users in the IT department who have database expertise. Contact your IT department if you have questions regarding archiving.

**Note:** For instructions on how to use the Archiving engine, contact MAP.



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# Chapter 6: Operations

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## Introduction

The manufacturing process for a given “Manufacturing Line” is typically organized into “Operations” and “Workcenters.” A manufacturing line can have multiple operations. An operation can have multiple workcenters. For the purpose of the quality testing process, an operation defines the manufacturing step where a sample is taken (product or process) and testing is performed. For example, if a manufacturing line has two steps where samples are taken and different (or repeated) testing is performed, then that line has two operations.

The operations configuration settings are located on Page: {PatrolSuite URL}/Quality/Setup/Operations

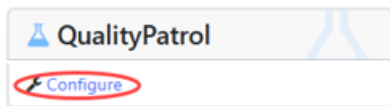
 Users with the following permission can edit the QualityPatrol/Configure/Operations page.

<input checked="" type="checkbox"/> Yes	Manage Operations	Allows users to configure operations.
---	-------------------	---------------------------------------

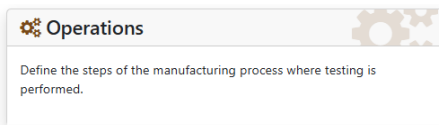
---

## View

15. To view the operations, click on Configure in the QualityPatrol card on the PatrolSuite homepage.



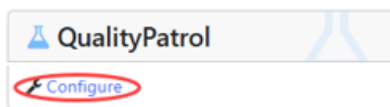
a. Click on the Operations card.



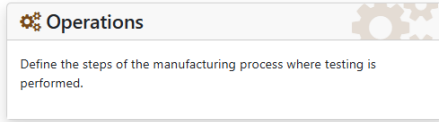
---

## Add New

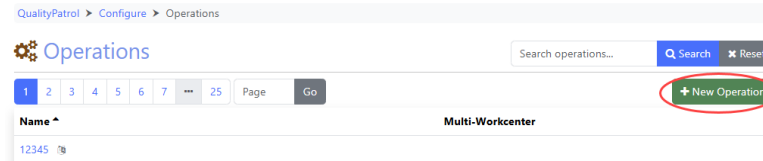
16. To add a new operation, click on Configure in the QualityPatrol card on the PatrolSuite homepage.



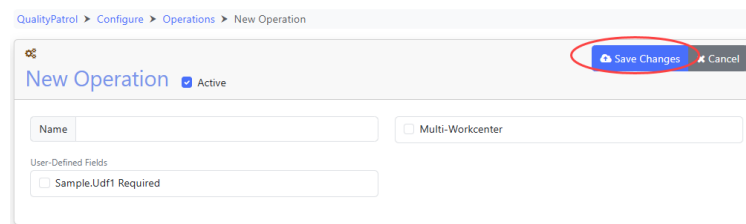
a. Click on the Operations card.



- b. Click the 'New Operation' button.



- c. Enter the operation name, check the Multi-Workcenter checkbox if users need to be able to initiate a sample at multiple workcenters when initiating a sample at this operation, select any User Defined Fields that apply, and click the 'Save Changes' button.

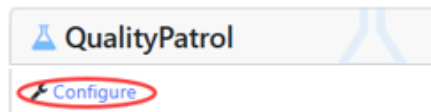


**Use Case:** If the same manufacturing order is running at an operation that has three workcenters, and a sample needs to be initiated at each workcenter at a given time, then clicking the Multi-Workcenter checkbox allows users to start initiating one sample, select all three workcenters, and when the sample is saved, three samples are actually created (one for each workcenter).

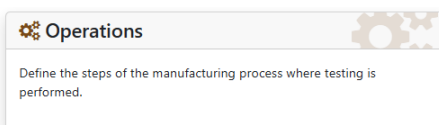
**Use Case:** If a User Defined Field (UDF) is associated with an operation, then users will be required to provide an answer for the UDF when creating a sample from that operation. For example, if "Sample.Udf1" were localized to read "Batch Number," and it were checked in this operations, then users would have to provide the batch number for all QualityPatrol samples created from this operation.

## Edit

17. To edit an operation, click on Configure in the QualityPatrol card on the PatrolSuite homepage.

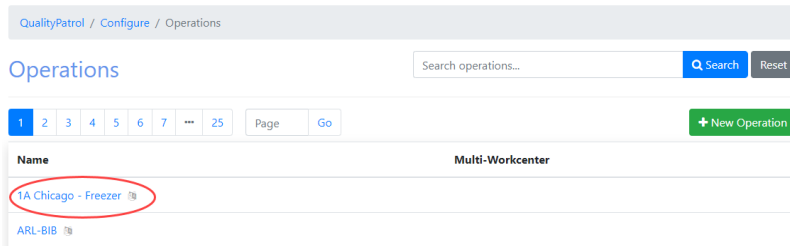


- a. Click on the Operations card.

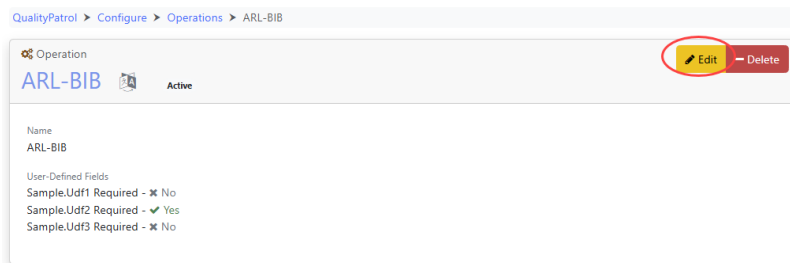




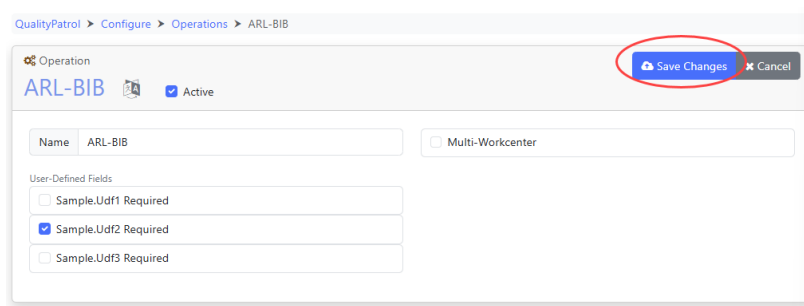
b. Click on the operation name.



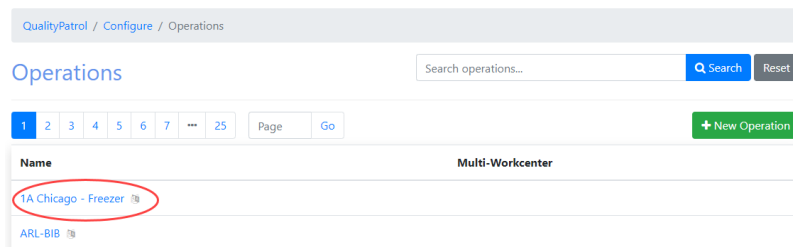
c. Click on the 'Edit' button.



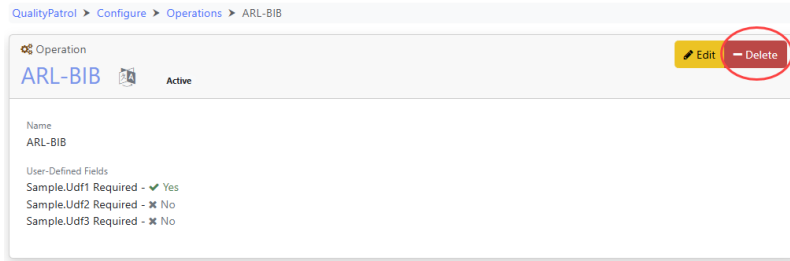
d. Edit the name, Multi-Workcenter settings, and the UDF selections and click 'Save Changes.'



18. To delete an operation, click on the operation name.

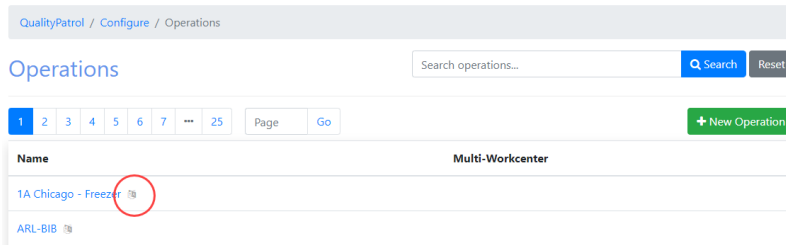


a. Click on the 'Delete' button and click on the 'Delete' button in the confirmation window.

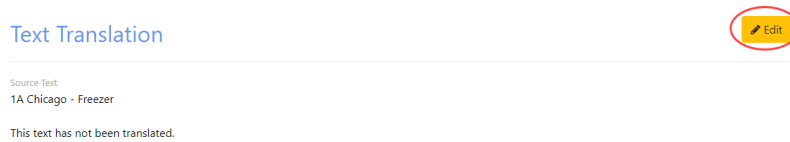


## Localize

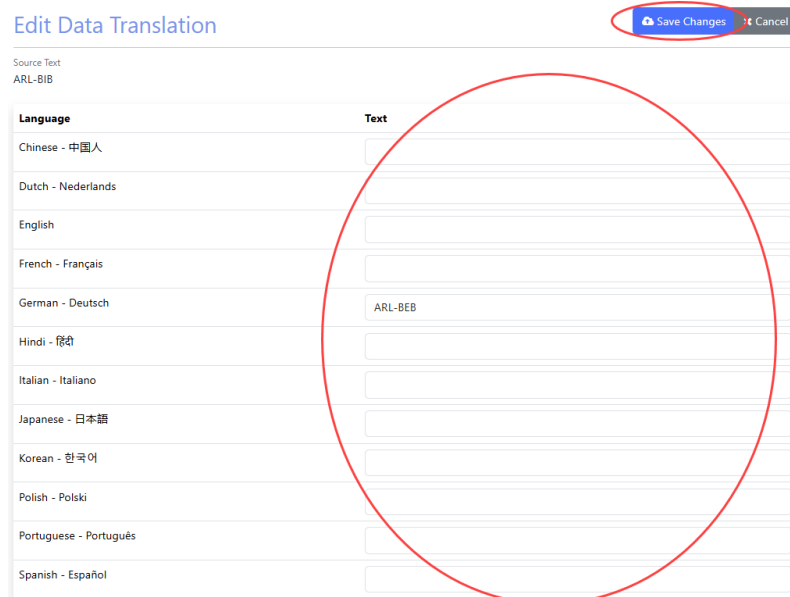
19. To translate the operation name into other languages, click the localization icon for the desired operation.



a. Click the 'Edit' button.



b. Enter the translation for the desired languages and click 'Save Changes.'





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# Chapter 7: Quality States

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## Introduction

Quality states define 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."

See page: {PatrolSuite URL}/Quality/Setup/QualityStates

 Users with the following permission can edit the QualityPatrol/Configure/Quality States page.

 Manage Quality States	Allows users to configure quality states.
---	---

---

## Definitions

20. QualityPatrol comes out-of-the-box with the following quality states. **MAP recommends adopting the following quality states (in addition to any others that are necessary) because they are associated with and are used to produce the QualityPatrol Dashboard metrics and are used to filter reports.**

- a. Approved: General Use – Product that meets all quality requirements and can be further processed or shipped as intended without restriction.
- b. Approved: OOS Conditions – Product that has one or more test results that are out of specification, however the product has been approved for use as intended without restriction.
- c. Approved: Restricted Use - Product that meets all or most quality requirements but must be shipped or further processed according to special instructions.

**Use Case:** The following is an example of the quality state workflow for the application of Approved: Restricted Use.

- i. Product that can be sold to any of seven customers is placed on "Hold" when manufactured. This is the signal that the product may or may not have a quality problem, and that an investigation is ongoing.
  - ii. An out of spec condition is confirmed. The quality state remains "Hold."
  - iii. The organization obtains approval from customer #3 who will accept the product.
  - iv. The quality state is changed to "Approved: Restricted Use" and the quality manager adds quality state comments that indicate that the product can be shipped only to Customer #3.
- d. Hold – Product may or may not meet the quality requirements for the intended product, and an investigation, which may include retesting or contacting the intended customer, is in process.
  - e. Rejected – Sometimes named "Rejected: Scrap." Product does not meet the quality requirements for



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the intended product, and the product cannot be reworked or sold as an alternative product.

- f. **Rework** – Product that was formerly on Hold, and now has been dispositioned for rework.

**Use Case:** The following is an example of the quality state workflow for the application of Approved: Rework.

- i. Product is placed on “Hold” when manufactured. This is the signal that the product may or may not have a quality problem, and that an investigation is ongoing.
- ii. An out of spec condition is confirmed. The quality state remains “Hold.”
- iii. Once the disposition is determined (e.g. to rework at a 10% rate), the quality state is changed to “Approved: Rework.” This is the signal that the product can now be further processed as rework material according to the rework instructions.

---

## View

21. To view the quality states, click on Configure in the QualityPatrol card on the PatrolSuite homepage.



- a. Click on the Quality States card.



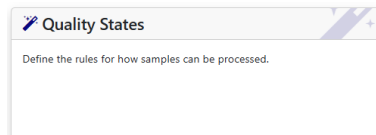
---

## Add New

22. To add a new quality state, click on Configure in the QualityPatrol card on the PatrolSuite homepage.



- b. Click on the Quality States card.



- c. click the ‘New Quality State’ button.

**Note:** The image below shows emojis which have been added to the quality state type name to provide visual clarity regarding the type. MAP does not recommend adding emojis to the information created in PatrolSuite, however, the quality state is an important piece of information which justifies the emoji use.



QualityPatrol > Configure > Quality States

**Quality States** + New Quality State

Name	Type	Restricted	Approved with test results out of specification	Financial System Code	Manufacturing System Code
Approved: General Use	Approve			AGU	Approved
Approved: OOS Conditions	Approve		Approved with test results out of specification		Approved
Approved: Restricted Use	Approve	Restricted		321231	Restricted
Delayed	Approve				Delayed
Hold	Hold				Hold
Rejected: Scrap	Reject				Rejected
Rework	Hold				Rework

- d. Enter the quality state name, choose the quality state type, enter the financial and manufacturing system code (optional), and click the 'Save Changes' button.

QualityPatrol / Configure / Quality States / New Quality State

**New Quality State** Save Changes Cancel

Name:

Quality State Type: Approve  
Approve  
Hold  
Reject

Financial System Code:

Manufacturing System Code:

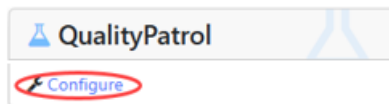
**Note:** The three out-of-the-box quality state types are not editable. Each quality state must be associated with one of these quality state types.

**Note:** The Financial System Code is optional. If QualityPatrol is integrated to communicate bi-directionally with the local ERP, then this code will be sent to the ERP when the corresponding quality state is assigned.

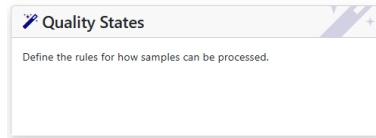
**Note:** The Manufacturing System Code is optional. If QualityPatrol is integrated to communicate bi-directionally with the local MES, then this code will be sent to the MES when the corresponding quality state is assigned.

## Edit

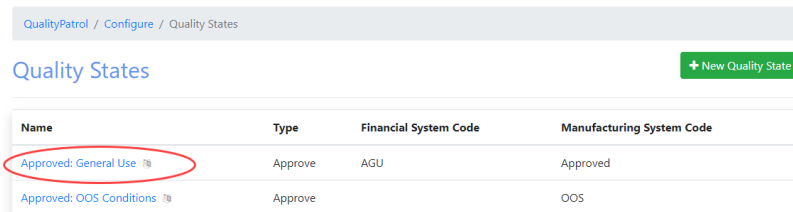
23. To edit a quality state, click on Configure in the QualityPatrol card on the PatrolSuite homepage.



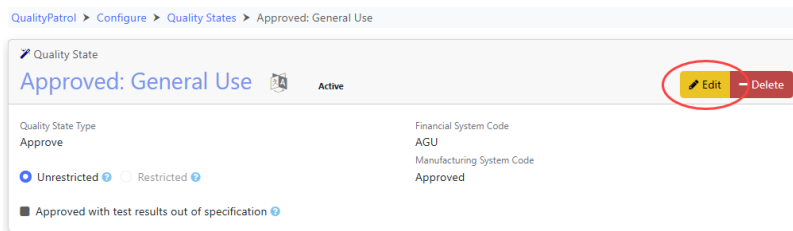
- a. Click on the Quality States card.



b. click on the desired quality state name.



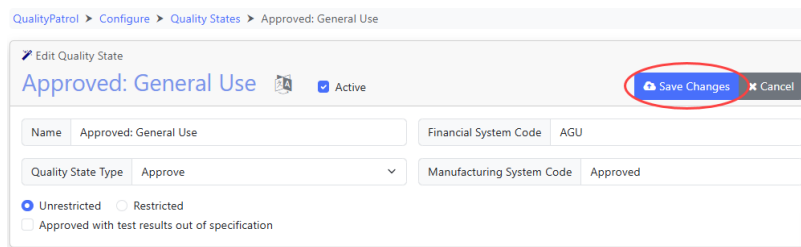
c. Click on the 'Edit' (or 'Delete') button. Note that quality states cannot be deleted if they have been assigned to one or more samples.



d. Edit the active/inactive status, name, financial and manufacturing codes, and select the quality state type. Select the restriction and check the approval criteria checkbox. Click 'Save Changes.'

**Note:** If the quality state is such that the product is unrestricted in its use (such as “Approved – General Use”), then select the Unrestricted radio button. If the quality state is such that the product is restricted in its use (such as “Approved – Restricted Use”), then select the Restricted radio button.

**Note:** If the quality state is such that the product is being approved despite out of spec test results (such as “Approved – Out of Spec Conditions”), then check the “Approved with test results out of specification” checkbox. Otherwise, do not check the “Approved with test results out of specification” checkbox.



24. To delete a quality state, click on the quality state name.



QualityPatrol / Configure / Quality States

Quality States + New Quality State

Name	Type	Financial System Code	Manufacturing System Code
Approved: General Use	Approve	AGU	Approved
Approved: OOS Conditions	Approve		OOS

a. Click on the 'Delete' button and click on the 'Delete' button in the confirmation window.

QualityPatrol > Configure > Quality States > Approved: General Use

Quality State

Approved: General Use Active Edit Delete

Quality State Type  
Approve

Financial System Code  
AGU

Manufacturing System Code  
Approved

Unrestricted  Restricted

Approved with test results out of specification

## Localize

Users with the following permission can edit content translations.

Edit Content Translations	For user-entered content (such as a facility name): Displays a translation icon adjacent to such content and allows the user to click on the icon to add and edit user-entered translations.
---------------------------	--

Users with the following permission can view content translations.

View Content Translations	For user-entered content (such as a facility name): Displays a translation icon adjacent to such content and allows the user to click on the icon to see user-entered translations (if any).
---------------------------	--

25. To translate the quality state name into other languages, click the translation icon for the desired quality state and translate as previously documented in this user guide.

QualityPatrol / Configure / Quality States

Quality States + New Quality State

Name	Type	Financial System Code	Manufacturing System Code
Approved: General Use	Approve	AGU	Approved
Approved: OOS Conditions	Approve		OOS

**Note:** For multi-lingual organizations, it is very important to translate a single set of the organization's quality states into the required languages. For example, if your organization speaks English and German, do not create a "Rejected" and a "Abgelehnt" quality state. This will have a negative effect on the QualityPatrol sample search page and the dashboard and metrics & reports. Create a single quality state named "Rejected," and translate it into German.





# Chapter 8: Quality Plan Statuses

## Introduction

Quality plan statuses define the state of a quality plan, which may change over time.

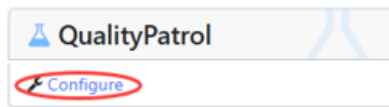
See page: {PatrolSuite URL}/ Quality/Setup/QualityPlanStatuses

 Users with the following permission can edit the QualityPatrol/Configure/QualityPlanStatuses page.

 <b>Yes</b>	<b>Manage Quality Plan Statuses</b>	Allows users to configure the quality plan statuses.
--	-------------------------------------	--

## View

26. To view the quality plan statuses, click on Configure in the QualityPatrol card on the PatrolSuite homepage.



27. Click on the Quality Plan Statuses hyperlink in the Quality Plans & Specs card.










The quality plan statuses page will open:

QualityPatrol > Configure > Quality Plan Statuses

### Quality Plan Statuses

[+ New Quality Plan Status](#)

Name	Is Valid?
6. <input checked="" type="checkbox"/> Approved for Experimental Use Only 	✓
7. <input checked="" type="checkbox"/> Approved for Commercial Use 	✓
1. <input checked="" type="checkbox"/> Do Not Use - Not Approved 	
2. <input checked="" type="checkbox"/> Do Not Use - Submitted for Approval 	
3. <input checked="" type="checkbox"/> Do Not Use - Rejected 	
4. <input checked="" type="checkbox"/> Do Not Use - Under Revision 	
5. <input checked="" type="checkbox"/> Do Not Use - Discontinued Product or Process 	

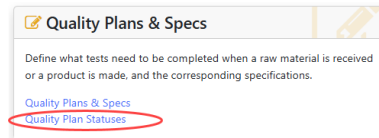


## Add New

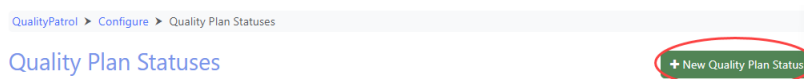
28. To create a new Quality Plan Status, click on Configure in the QualityPatrol card on the PatrolSuite homepage.



a. Click on the Quality Plan Statuses hyperlink in the Quality Plans & Specs card.

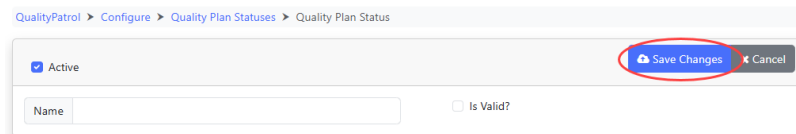


b. Click on the 'New Quality Plan Status' button.



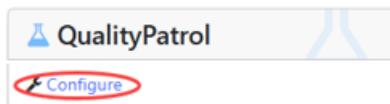
c. Enter the name, select the validity, and click the 'Save Changes' checkbox.

**Note:** Check the Is Valid checkbox if the status is one that is approved for use.

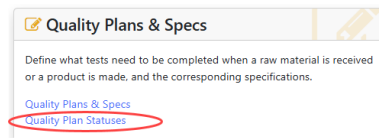


## Edit

29. To edit an existing status, click on Configure in the QualityPatrol card on the PatrolSuite homepage.



a. Click on the Quality Plan Statuses hyperlink in the Quality Plans & Specs card.



b. Click on the status name.

# QualityPatrol – Configure

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QualityPatrol > Configure > Quality Plan Statuses

Quality Plan Statuses + New Quality Plan Status

Name	Is Valid?
6. <input checked="" type="checkbox"/> Approved for Experimental Use Only	<input checked="" type="checkbox"/>
7. <input checked="" type="checkbox"/> Approved for Commercial Use	<input checked="" type="checkbox"/>
1. <input checked="" type="checkbox"/> Do Not Use - Not Approved	<input type="checkbox"/>
2. <input checked="" type="checkbox"/> Do Not Use - Submitted for Approval	<input type="checkbox"/>
3. <input checked="" type="checkbox"/> Do Not Use - Rejected	<input type="checkbox"/>
4. <input checked="" type="checkbox"/> Do Not Use - Under Revision	<input type="checkbox"/>
5. <input checked="" type="checkbox"/> Do Not Use - Discontinued Product or Process	<input type="checkbox"/>

c. Click on the 'Edit' button.

QualityPatrol > Configure > Quality Plan Statuses > 6. Approved for Experimental Use Only

Quality Plan Status  Edit Delete

6. Approved for Experimental Use Only **Active**

Quality State Type  Is Valid?

6. Approved for Experimental Use Only

d. Enter the name, select the validity, and click the 'Save Changes' checkbox.

QualityPatrol > Configure > Quality Plan Statuses > 6. Approved for Experimental Use Only

Quality Plan Status  Save Changes Cancel

6. Approved for Experimental Use Only  Active

Name   Is Valid?

30. To delete an existing status, click on the status name.

QualityPatrol > Configure > Quality Plan Statuses

Quality Plan Statuses + New Quality Plan Status

Name	Is Valid?
6. <input checked="" type="checkbox"/> Approved for Experimental Use Only	<input checked="" type="checkbox"/>
7. <input checked="" type="checkbox"/> Approved for Commercial Use	<input checked="" type="checkbox"/>
1. <input checked="" type="checkbox"/> Do Not Use - Not Approved	<input type="checkbox"/>
2. <input checked="" type="checkbox"/> Do Not Use - Submitted for Approval	<input type="checkbox"/>
3. <input checked="" type="checkbox"/> Do Not Use - Rejected	<input type="checkbox"/>
4. <input checked="" type="checkbox"/> Do Not Use - Under Revision	<input type="checkbox"/>
5. <input checked="" type="checkbox"/> Do Not Use - Discontinued Product or Process	<input type="checkbox"/>

a. Click on the 'Delete' button.

QualityPatrol > Configure > Quality Plan Statuses > 6. Approved for Experimental Use Only

Quality Plan Status  Edit Delete

6. Approved for Experimental Use Only **Active**

Quality State Type  Is Valid?

6. Approved for Experimental Use Only

## Localize

31. To localize the name of an existing status, click on the status name.

# QualityPatrol – Configure

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QualityPatrol > Configure > Quality Plan Statuses

### Quality Plan Statuses

[+ New Quality Plan Status](#)

Name	Is Valid?
6. Approved for Experimental Use Only	✓
7. Approved for Commercial Use	✓
1. Do Not Use - Initial Draft	
2. Do Not Use - Submitted for Approval	
3. Do Not Use - Rejected	
4. Do Not Use - Under Revision	
5. Do Not Use - Discontinued Product or Process	

a. Click on the localization icon.

QualityPatrol > Configure > Quality Plan Statuses > 6. Approved for Experimental Use Only

### Quality Plan Status

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

6. Approved for Experimental Use Only Active

Quality State Type:  Is Valid?

6. Approved for Experimental Use Only

b. Click the 'Edit' button.

### Text Translation

[Edit](#)

Source Text  
6. Approved for Experimental Use Only

This text has not been translated.

c. Enter the desired localized text and click the 'Save Changes' checkbox.

### Edit Data Translation

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

Source Text  
6. Approved for Experimental Use Only

Language	Text
Chinese - 中国人	<input type="text"/>
Dutch - Nederlands	<input type="text"/>



# Chapter 9: Quality Plans & Specs

## Separate User Guide

See the “Quality Plans & Specs” user guide for instructions to create quality plans and to define specifications.

**Quality Plans & Specs**

Define what tests need to be completed when a raw material is received or a product is made, and the corresponding specifications.

[Quality Plans & Specs](#)  
[Quality Plan Statistics](#)

Configure

**Search Quality Plans**

Product Group: Any Facility: Any

Product:  Operation: Any

Customer:  Test Method:

1 2 3 4 5 6 7 ... 931 Page Go

Product	Operation	Customer
29451 - CDB TURKEY MB 6/4# PROTEIN	VNL-Meatball-Blending-L1	
11048 - SFGLHDGLRTO192/2.25Z BAKERY-FROZEN DOUGH	FRE-Roll-Line-Adamatic	
02987 - JAGGERS HMBGR ROLL DOUGH 180/ZZ BAKERY-FROZEN DOUGH	MUR-Roll-Konig	

Quality Plans / 11048 - FRE-Roll-Line-Adamatic

**Quality Plan**

**11048 - FRE-Roll-Line-Adamatic**

Product: 11048 SFGLHDGLRTO192/2.25Z Test Plan Status: ● Approved = Commercialized

Operation: FRE-Roll-Line-Adamatic

Customer: Empty Soft Golden Hot Dog Roll 192/2.25Z

Test Type: All

Test Method	CoA	Exempt.	Active
<b>FRE-BeltSpeed- Admatics-Reciprocator</b> -Reciprocator-Belt-Speed-for-Admatics-1-and-2-on-Roll-Line	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>FRE-Piston Block Inspection-08</b> -Inspection-of-GB-across-piston-block-Roll-line-at-the-Admatics-for-tab-alignment-and-any-damage,-cracking,-or-missing-tabs	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>



---

# Chapter 10: Sample Locations


---

## Introduction

Sample locations define the physical location on a sample where tests or measurements are made for VMI (x-bar) testing.

See page: {PatrolSuite URL}/Quality/Setup/SampleLocations

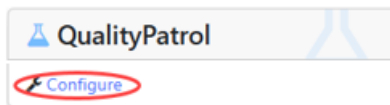
 Users with the following permission can edit sample locations.

 Yes	Manage Sample Locations	Allows users to configure sample locations.
---	-------------------------	---

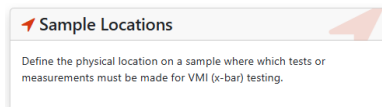
---

## View

32. To view the sample locations, click on Configure in the QualityPatrol card on the PatrolSuite homepage.



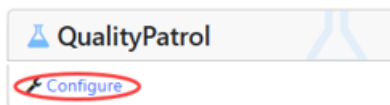
33. Click on the Sample Locations card.



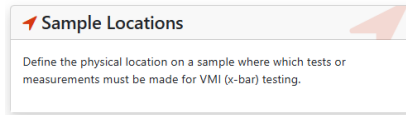
---

## Add New

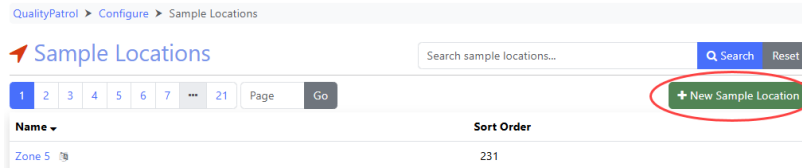
34. To add a new sample location, click on Configure in the QualityPatrol card on the PatrolSuite homepage.



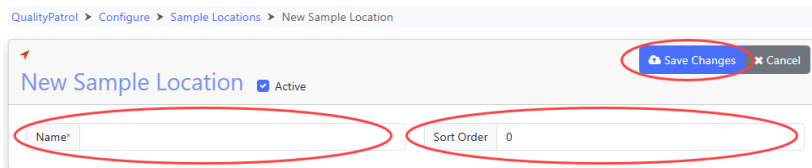
a. Click on the Sample Locations card.



- b. Click the 'New Sample Location' button.

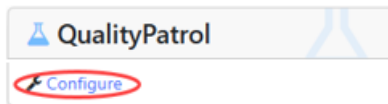


- c. Enter the sample location name and enter a numeric value to define the sample location's sort order relative to all other similar sample locations. The sort order enables sample locations to appear in QualityPatrol in a desired order that is not alphabetical. Click the 'Save Changes' button.

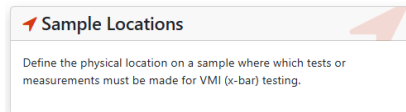


## Edit

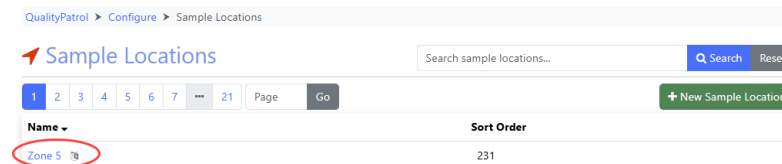
35. To edit an existing sample location, click on Configure in the QualityPatrol card on the PatrolSuite homepage.



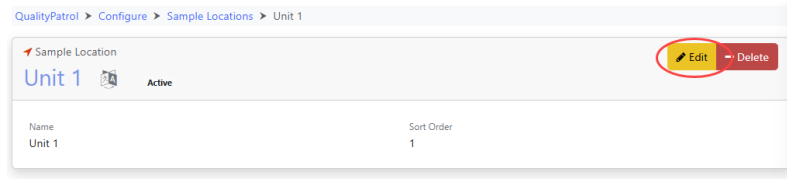
- a. Click on the Sample Locations card.



- b. Click on the sample location name.

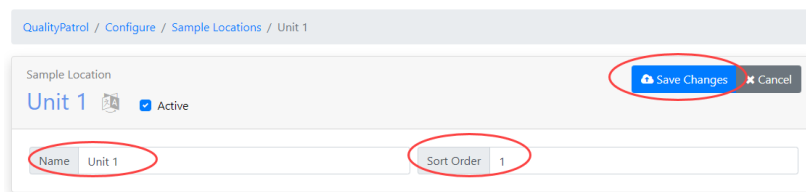


- c. Click on the 'Edit' button.

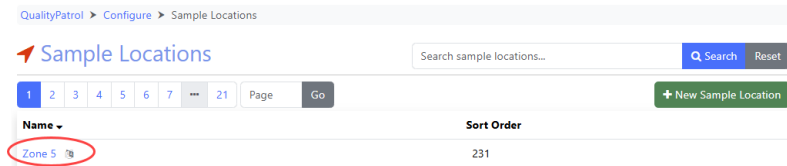


- d. Enter the sample location name and enter a numeric value to define the sample location's sort order and click 'Save Changes.'

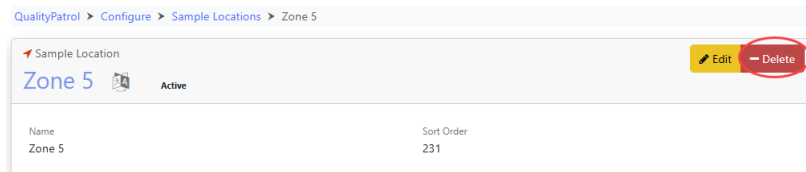
**Note:** To make the location inactive, uncheck the Active checkbox.



36. To delete an existing sample location, click on the sample location name.

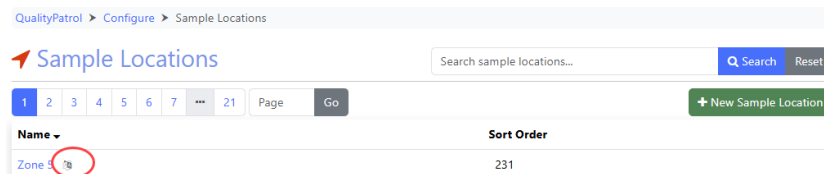


- a. Click the 'Delete' button and click the 'Delete' button in the confirmation window.



## Localize

37. To translate the sample location name into other languages, click the translation icon for the desired sample location.



- a. Click the 'Edit' button.



### Text Translation

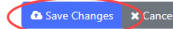


Source Text  
Unit 1

This text has not been translated.

- b. Enter the translation for the languages required and click 'Save Changes.'

### Edit Data Translation



Source Text  
Unit 1

Language	Text
Chinese - 中国人	单元1
Dutch - Nederlands	



---


# Chapter 11: Sample Frequencies


---

## Introduction

Sample frequencies define how often a sample is taken to measure product characteristics or process parameters. Frequencies are either “time based” (e.g. Every 30 minutes) or “event based” (i.e. Every time a product unit is produced).

See page: {PatrolSuite URL}/Quality/Setup/SampleFrequencies

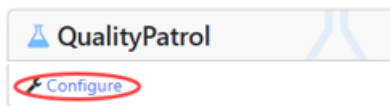
 Users with the following permission can edit sample frequencies.

 Yes	Manage Frequencies	Allows users to configure frequencies.
---	--------------------	--

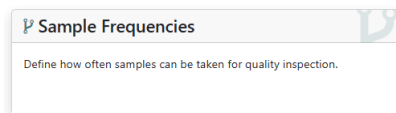
---

## View

38. To view the sample frequencies, click on Configure in the QualityPatrol card on the PatrolSuite homepage.



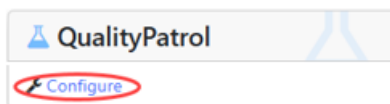
39. Click on the Sample Frequencies card.



---

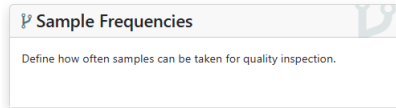
## Add New

40. To add a new sample frequency, click on Configure in the QualityPatrol card on the PatrolSuite homepage.

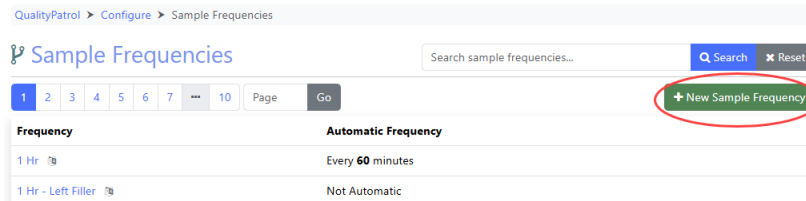




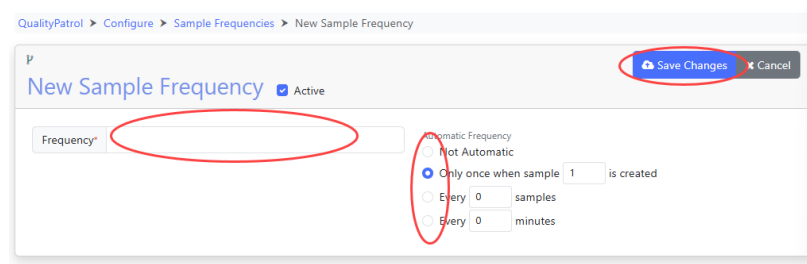
- a. Click on the Sample Frequencies card.



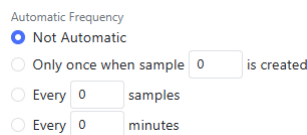
- b. Click the 'New Sample Frequency' button.



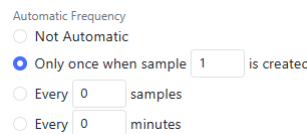
- c. Enter the sample frequency name and if necessary, define the Automatic Frequency logic, then click 'Save Changes.'



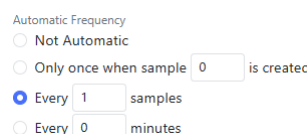
**Note:** If manufacturing operators or lab technicians determine when a sample gets taken, then the Automatic Frequency should be set to “Not Automatic.”



**Note:** If your sampling plan requires testing, for example, only when the first sample of a manufacturing order is taken, then select the “Only once when sample ‘1’ is created” radio button. If selected, then QualityPatrol will automatically track the initiated samples and apply this frequency to the first sample of a manufacturing order.



**Note:** If your sampling plan requires testing when every sample is taken, then select the “Every ‘1’ samples” radio button. If selected, then QualityPatrol will automatically track the initiated samples and apply the appropriate frequency.



**Note:** If your sampling plan entails initiating a QualityPatrol sample that is time based (e.g. every 30

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minutes), then select the “Every ‘30’ minutes” radio button. QualityPatrol does not currently track the expiration of time and therefore will not automatically prompt users at the applicable moment when its time to create a sample. However, if you define these configuration settings now, additional work may be avoided when MAP releases this capability.

Automatic Frequency

Not Automatic

Only once when sample  is created

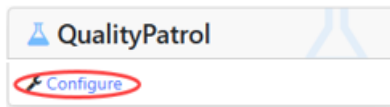
Every  samples

Every  minutes

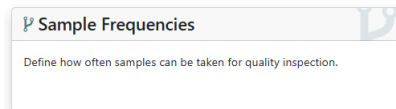
**Note:** “Startup” is a [sample type](#) used in QualityPatrol to identify startup samples and has implications for how such data is used in CoAs, DashPatrol, DataPatrol, and Metrics & Reports. **Startup is not a frequency. Do not create a frequency called “Startup.”** If this mistake has been made, then the Startup frequency should be deleted. If it cannot be deleted because it has been consumed in test plans or samples have been created, then it should be deactivated. Once deleted or deactivated, consider re-training the users regarding the difference between sample types (Production and Startup) and frequencies.

## Edit

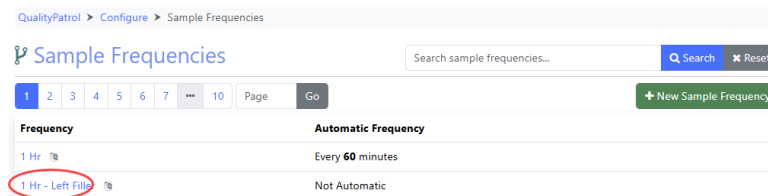
41. To edit an existing sample Frequency, click on Configure in the QualityPatrol card on the PatrolSuite homepage.



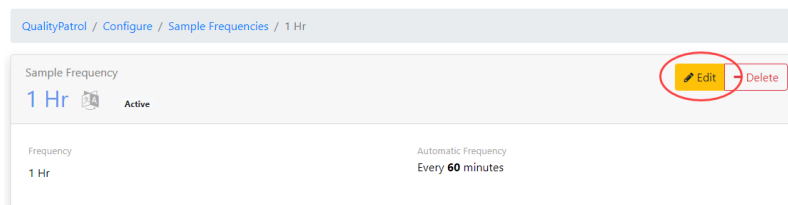
a. Click on the Sample Frequencies card.



b. Click on the sample frequency name.



c. Click on the ‘Edit’ (or ‘Delete’) button.



d. Enter the sample frequency name and enter any required Automatic Frequency logic and click ‘Save’



Changes.'

QualityPatrol / Configure / Sample Frequencies / 1 Hr

Sample Frequency

1 Hr  Active

Frequency 1 Hr

Automatic Frequency

Not Automatic

Only once when sample 0 is created

Every 0 samples

Every 60 minutes

Save Changes Cancel

42. To delete an existing sample frequency, click on the sample frequency name.

QualityPatrol > Configure > Sample Frequencies

Sample Frequencies

Search sample frequencies... Search Reset

1 2 3 4 5 6 7 ... 10 Page Go + New Sample Frequency

Frequency	Automatic Frequency
1 Hr	Every 60 minutes
1 Hr - Left Filler	Not Automatic

a. Click the 'Delete' button and click the 'Delete' button in the confirmation window.

QualityPatrol > Configure > Sample Frequencies > 1 Hr - Left Filler

Sample Frequency

1 Hr - Left Filler  Active

Frequency 1 Hr - Left Filler Automatic Frequency Not Automatic

Edit Delete

## Localize

43. To translate the sample frequency name into other languages, click the translation icon for the desired sample frequency.

QualityPatrol / Configure / Sample Frequencies

Sample Frequencies

Search sample frequencies... Search Reset

1 2 3 4 5 6 7 ... 10 Page Go + New Sample Frequency

Frequency	Automatic Frequency
1 Hr	Every 60 minutes
1 Hr - Left Filler	Not Automatic

a. Click the 'Edit' button.



### Text Translation

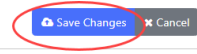


Source Text  
1 Hr

Language	Text
German - Deutsch	1 Stunde
Spanish - Español	1 hora
Chinese - 中国人	1小时

- b. Enter the translation for the languages required and click 'Save Changes.'

### Edit Data Translation



Source Text  
1 Hr

Language	Text
Chinese - 中国人	1小时
Dutch - Nederlands	



# Chapter 12: Test Properties


## Introduction

Test methods are organized by being placed into test properties.

**Test Property** – Identifies a group of test methods that are similar in nature or function.

**Test Method** – A measurement or test performed to determine a sample's conformance to quality requirements.

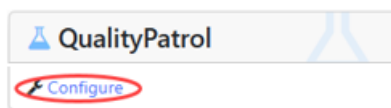
See page: {PatrolSuite URL}/Quality/TestProperties

 Users with the following permission can edit test properties.

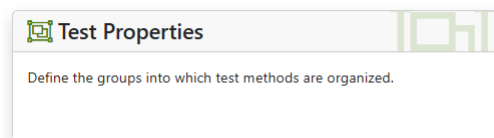
Yes	Manage Test Properties	Allows users to configure test properties.

## View

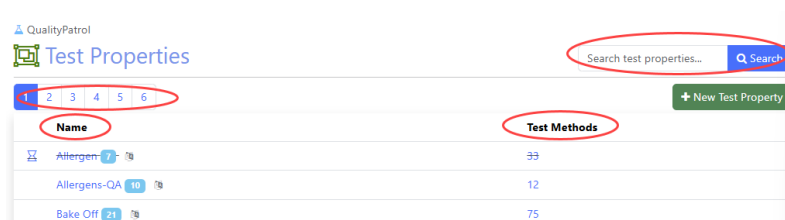
44. To view the existing test properties, click on Configure in the QualityPatrol card on the PatrolSuite homepage.



a. Click on the Test Properties card.



45. To search for a test property, enter the name and click the 'Search' button or use the paging feature. Additionally, the columns can be sorted by clicking on the column headers.





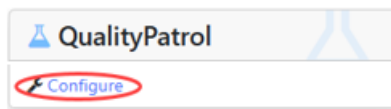
**Note:** The number of test methods in each test property is displayed in the “Test Methods” column. Click on the number to view the applicable test method page.

**Note:** The number of attribute options (if any) is displayed in the turquoise badge to the right of the test property name.

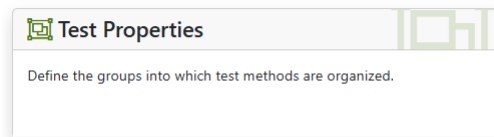
**Note:** An hourglass icon identifies test properties that are defined as “delayed” by default.

## Add New

46. To add a new test property, click on Configure in the QualityPatrol card on the PatrolSuite homepage.



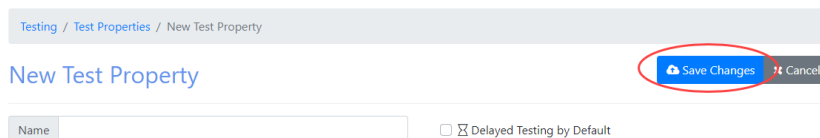
a. Click on the Test Properties card.



b. Click the ‘New Test Property’ button.



c. Enter the sample test property name and, if applicable, check the checkbox to indicate that the test methods associated with the property will be defined as Delayed Tests by default (although a test property can contain test methods that are and are not delayed tests). Click the ‘Save Changes’ button.



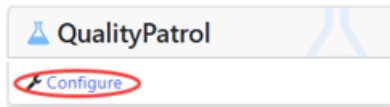
**Note:** CoAs can be configured to display the test property name, or not to display the test property name.

**Note:** Test properties are used to make building quality plans easier, and they are used in the QualityPatrol dashboard and in Reports & Metrics. Accordingly, take the time to define logical and meaningful test properties. It will be a mistake to conclude that all the test methods can be placed into just two test properties called “Product tests” and “Process tests.”

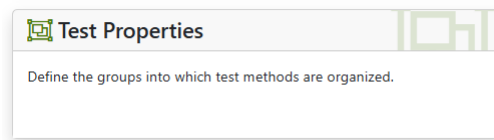


## General Tab - Edit

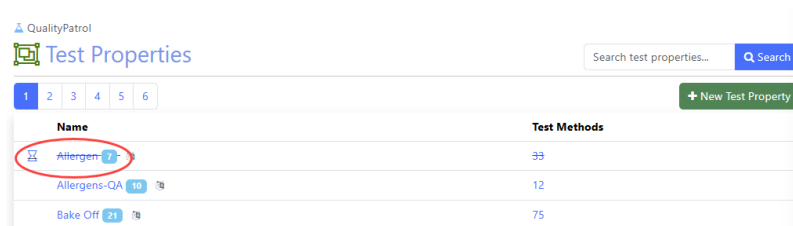
47. To edit an existing test property, click on Configure in the QualityPatrol card on the PatrolSuite homepage.



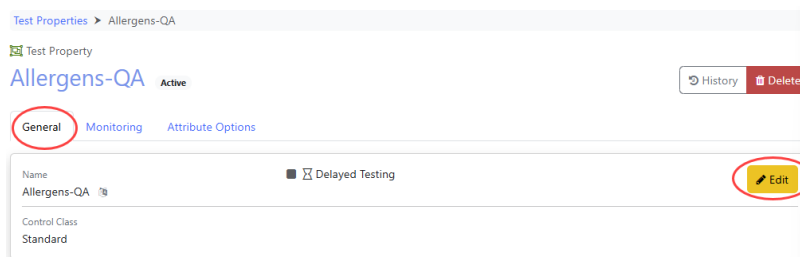
a. Click on the Test Properties card.




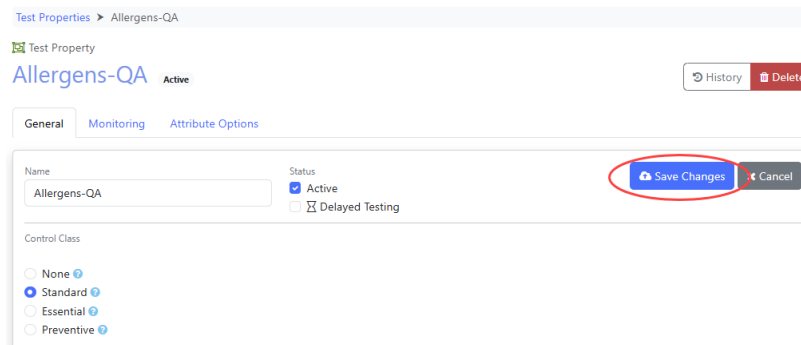
b. Click on a test property name.



c. On the General tab, click the 'Edit' button.



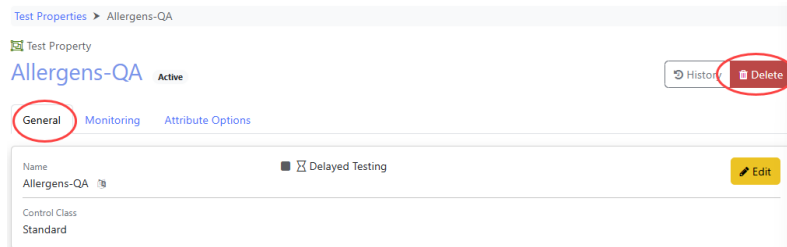
d. **NEW** Edit the test property status, name, delayed testing status, control class, and click 'Save Changes.' Click on the  Help Icon for information regarding the Control Classes.



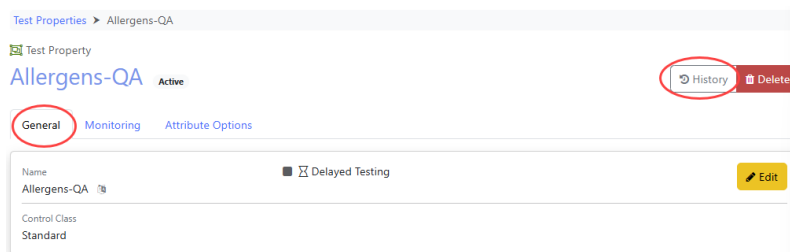
48. To delete a test property, click the 'Delete' button.



**Note:** A test property cannot be deleted if attribute options exist, or the property contains test methods, or if samples or test plans contain test methods in the test property.



49. To view an audit trail of changes to the test property, click the 'History' button.

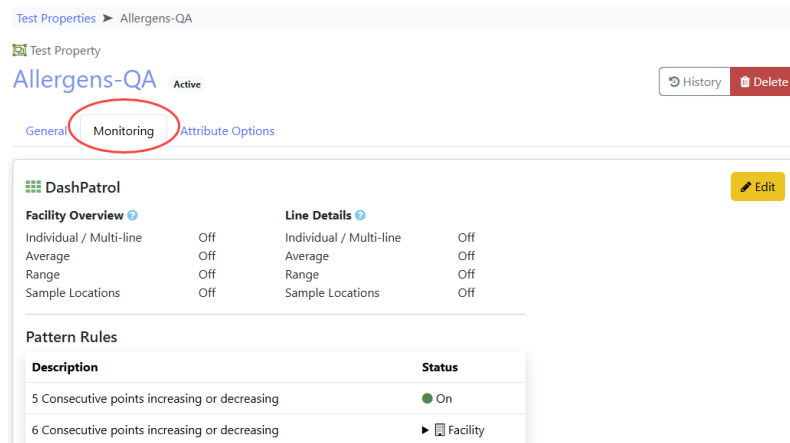


## **NEW** Monitoring Tab – DashPatrol Alarms & SPC Charts

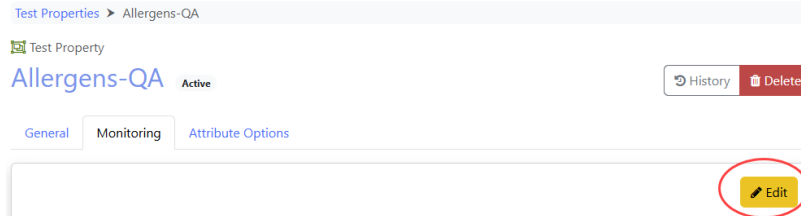
The Monitoring tab enables the configuration of the test properties' monitoring requirements in DashPatrol. The configuration setting defined at the Test Property level can be subsequently inherited at the Test Method and Test Plan levels.

50. To edit the DashPatrol monitoring settings, open the desired test property (from the QualityPatrol/Configure/Test Properties page).

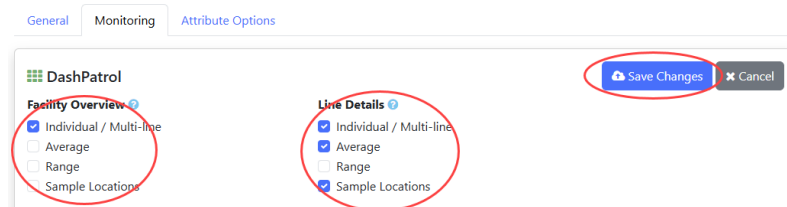
a. Click the Monitoring tab.



b. Click the 'Edit' button.



- c. Check the checkbox for the alarm and corresponding chart that should be displayed in DashPatrol **Facility Overview** and **Line Details** pages, and click the 'Save Changes' button. All test methods that belong to the test property will inherit the selections (unless specifically overridden in the test method).
- **Individual/Multi-line** – If the test method is variable single-input (VSI), then an alarm button will appear for the test method. If the test method is variable multi-input (VMI), then an alarm button that represents the multi-line chart will appear that for the test method.
  - **Average** – If the test method is variable multi-input (VMI), then an alarm button that represents the average values will appear that for the test method.
  - **Range** – If the test method is variable multi-input (VMI), then an alarm button that represents the range values will appear that for the test method.
  - **Sample Locations** - If the test method is variable multi-input (VMI), then an alarm button will appear for all individual sample locations.



## **NEW** Monitoring Tab – DashPatrol Pattern Rules

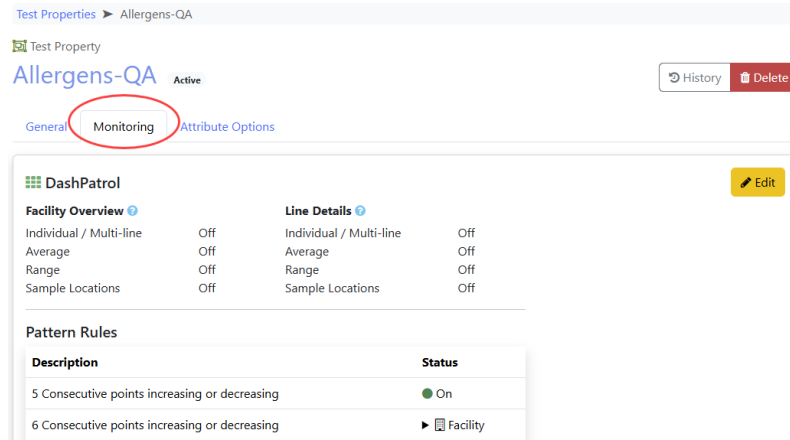
This tab enables the configuration of the test properties' statistical pattern rules in DashPatrol.

51. To edit the DashPatrol pattern rule settings, open the desired test property (from the QualityPatrol/Configure/Test Properties page).
  - a. Click the Monitoring tab.

# QualityPatrol – Configure

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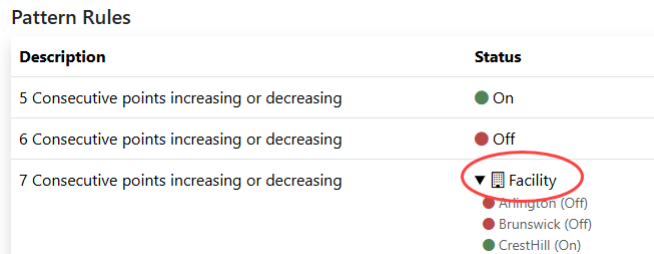


b. The state of each pattern rule is displayed in the Pattern Rules section.

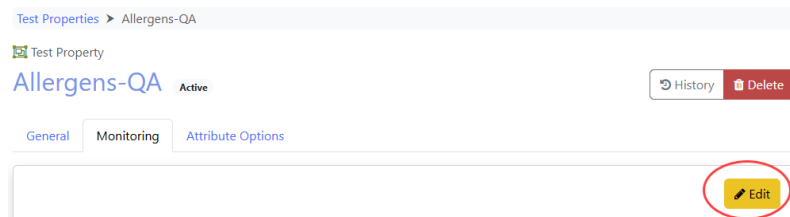
**On:** The pattern rule is in use for the test property and pattern rule violations will be displayed in DashPatrol.

**Off:** The pattern rule is not in use for the test property, even if it is On at the Facility level. Such pattern rule violations will not be displayed in DashPatrol even if they occur.

**Facility:** The pattern rule setting is inherited from the facility. Click on the Facility to see the use state for each facility.



c. Click the 'Edit' button.



d. Click the radio button for the desired pattern rule to turn it on, off, or to inherit it's status from the Facility settings, and click 'Save Changes.'



General Monitoring **Attribute Options**

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

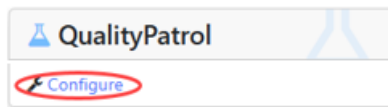
Pattern Rules

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

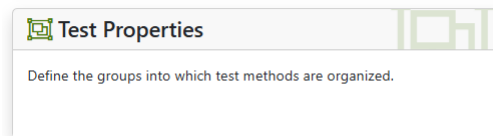
## Attribute Options Tab - View

**Note:** This tab displays the attribute options that can be consumed by the attribute test methods in this test property.

52. To view the attribute options for a test property, click on Configure in the QualityPatrol card on the PatrolSuite homepage.



a. Click on the Test Properties card.



b. Click on a test property name.

QualityPatrol

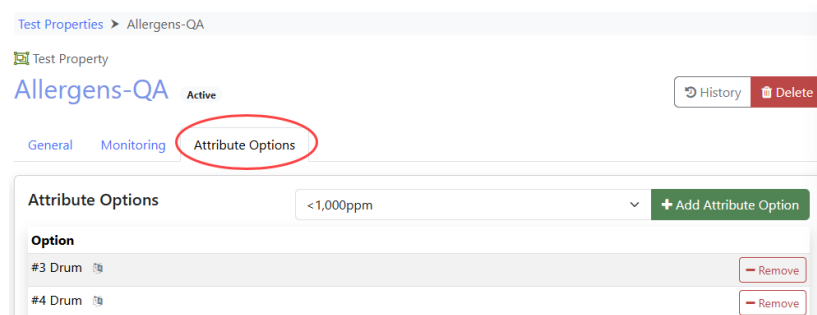
### Test Properties

Search test properties... [Search](#)

[+ New Test Property](#)

Name	Test Methods
Allergen	33
Allergens-QA	12
Bake Off	75

c. Click the Attribute Options tab.

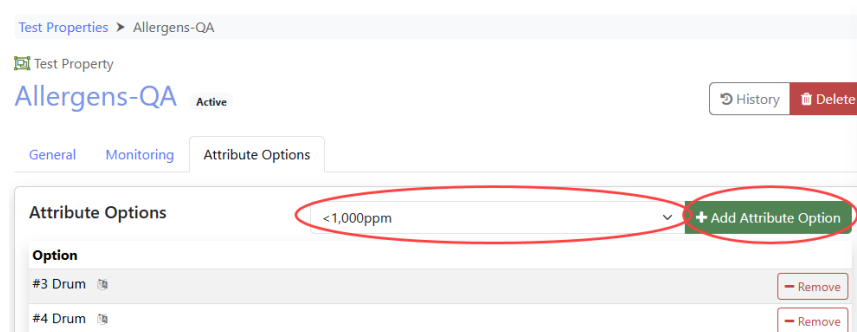


## Attribute Options Tab – Add/Remove

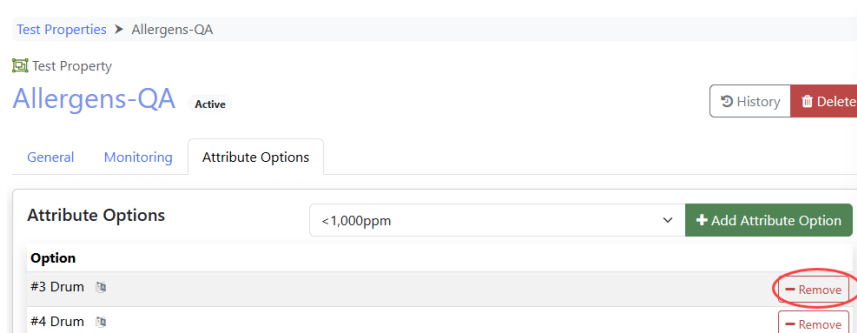
53. To add a new attribute option to a test property, select the attribute from the dropdown and then click on the 'Add Attribute Option' button.

**Note:** To help locate an attribute option, click in the dropdown and type the name of the attribute. It may be helpful to first find the exact name of the desired attribute using the QualityPatrol/Configure/AttributeOptions page.

**Note:** Inactive attribute options appear in gray text at the bottom of the dropdown list.



54. To remove an attribute option from a test property, click the desired 'Remove' button and then click the 'Delete' button from the confirmation window.



**Note:** Removing an attribute option from a test property does not remove it from all attribute test methods that are in the test property. Each test method must be edited to remove the attribute option. Historical test results are not affected, but new test results will not have the removed item as a selectable option.



## Localize

55. To translate a test property, click on the translation icon to the right of the test property name.

Testing

### Test Properties

Search test properties...

1 2 3 4 5 6

Name	Test Methods
Allergen	28
Allergens-QA	10
Bake Off	72
Basis Weight	0

a. Click the 'Edit' button.

### Text Translation

Source Text  
Basis Weight

Language	Text
German	Flächengewicht
English	Basis Weight
Dutch	Basisgewicht

b. Translate the source text into the desired languages and click 'Save Changes.' Click the Back text in the menu to return to the test properties page.

### Edit Data Translation

Source Text  
Basis Weight

Language	Text
Chinese	<input type="text"/>
Dutch	<input type="text" value="Basisgewicht"/>
English	<input type="text" value="Basis Weight"/>
French	<input type="text"/>
German	<input type="text" value="Flächengewicht"/>



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# Chapter 13: Test Methods

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
## Introduction

A PatrolSuite test method is the electronic reflection of a testing procedure that outlines how to measure physical or performance characteristics of a product or the conditions of the manufacturing process.

Test methods are organized by being placed into test properties.

See page: {PatrolSuite URL}/Quality/TestMethods

 Users with the following permission can edit test methods.

 Yes	Manage Test Methods	Allows users to configure test methods.
---	---------------------	---

The following icons appear throughout PatrolSuite to designate test method types:

### Data Types


**α#** Alphanumeric = Test results are free-text and may contain numbers, letters, and characters. Note that A# test methods do not (by definition) have specifications.


**AT** Attribute test results represent qualitative data measured in discrete units (e.g. Pass or Fail).

**VS** Variable Single-Input = Test results that reflect a single result that was measured on a continuous and infinite scale (e.g. 10.537).


**VM** Variable Multi-Input = A set of more than one test result from a single sample that are measured on a continuous and infinite scale (e.g. X-Bar testing)

### Test Types

 Product characteristic

 Process parameter

### Attachment

 The test method requires an attachment before it can be saved

### Delayed

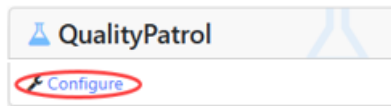
 The test method is a delayed test



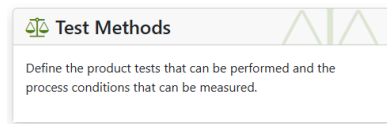
## Search Test Methods

This section applies to all test method types (alphanumeric, attribute, variable single-input, variable multi-input).

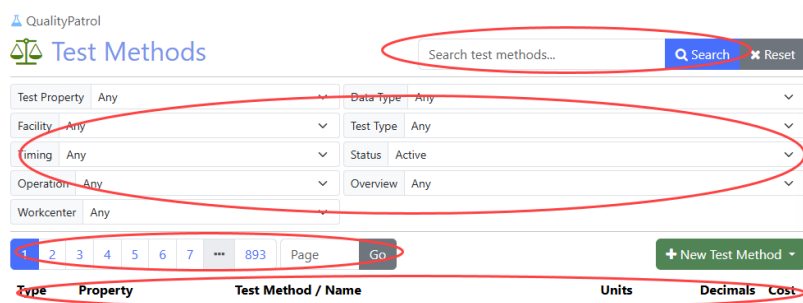
56. To search for an existing test method, click on Configure in the QualityPatrol card on the PatrolSuite homepage.



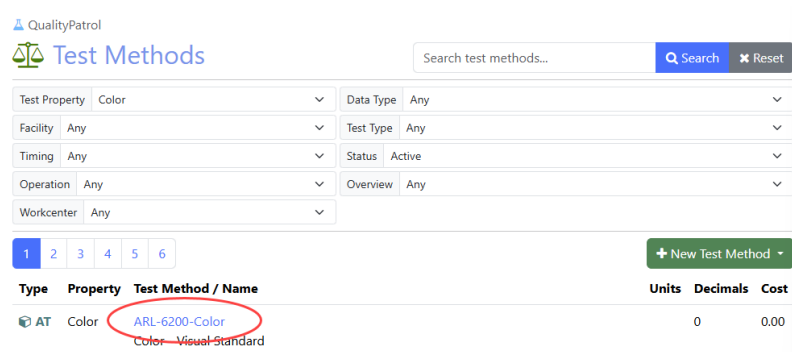
a. Click on the Test Methods card.



b. Enter the test method name and click the 'Search' button or use the filters or the paging feature to locate a test method. Note that the column headers can be sorted as well.



c. To open a test method, click on the test method number/name.



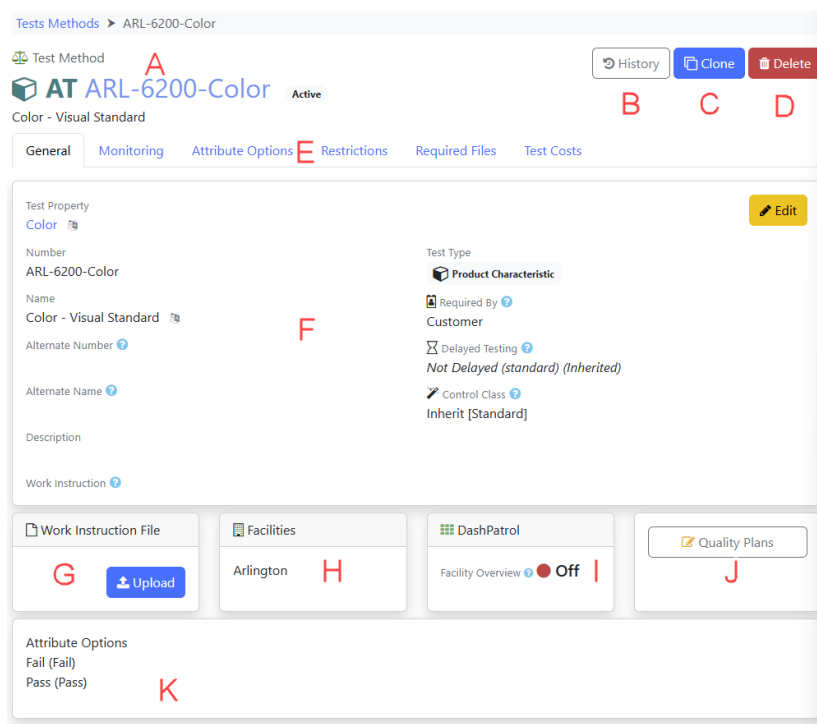
The test method page is organized as follows:

- Test method header.** Displays summary information about the test method.
- History button.** Click to see the audit trail of changes to the test method.
- Clone button.** Click to create a new test method from a clone of the open test method.
- Delete button.** Click to delete the test method.

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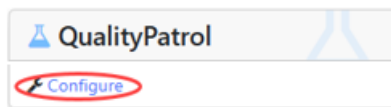
- E. **Content tabs.** Click a tab to view and edit test method meta data.
- F. **Content.** Displays the metadata related to the chosen tab.
- G. **Work Instruction File.** Enables a work instruction to be uploaded to the test method.
- H. **Facilities.** Displays facilities to which the test method is associated.
- I. **Dashboard.** Displays the monitoring criteria for DashPatrol.
- J. **Quality Plans.** Click to view the quality plans that contain the test method.
- K. **Attribute Options.** For attribute test methods, displays the attribute options that apply to the test method.



## Localization

This section applies to all test method types (alphanumeric, attribute, variable single-input, variable multi-input).

57. To localize a test method, click on Configure in the QualityPatrol card on the PatrolSuite homepage.



- a. Click on the Test Methods card.



**Test Methods**

Define the product tests that can be performed and the process conditions that can be measured.

- b. Use the Search command or the filters to locate the desired test method and click on the test method number.

QualityPatrol  
**Test Methods** Search test methods...

Test Property: Any | Data Type: Any  
 Facility: Any | Test Type: Any  
 Timing: Any | Status: Active  
 Operation: Any | Overview: Any  
 Workcenter: Any

1 2 3 4 5 6 7 ... 893 Page

Type	Property	Test Method / Name	Ur
α#	Allergen	<b>0005</b> New Test 005f	AT Attribute
VM	Allergen	1	VS Variable (Single Input) VM Variable (Multiple Input) α# Alphanumeric

- c. Click on the localization icon next to the test method number.

Tests Methods > 0005

Test Method

**α# 0005** Active  
 New Test 005f

General Restrictions Required Files Test Costs

Test Property: **Allergen**   
 Number: 0005  
 Test Type: Process Parameter

- d. Click the 'Edit' button.

**Text Translation**

Source Text  
 Allergen

Language	Text
German - Deutsch	Allergen
Spanish - Español	Alergenos

- e. Enter the translation for the required languages and click 'Save Changes.'



Edit Data Translation

Source Text  
Allergen

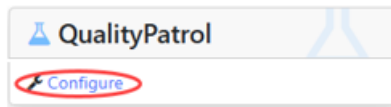
Language	Text
Chinese - 中国人	过敏原
Dutch - Nederlands	Allergenen
English	

Buttons: Save Changes, Cancel

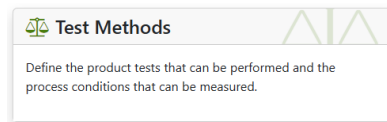
## Add New Test Method

This section applies to all test method types (alphanumeric, attribute, variable single-input, variable multi-input).

58. To add a new test method, click on Configure in the QualityPatrol card on the PatrolSuite homepage.



a. Click on the Test Methods card.



b. Click on the 'New Test Method' button and choose data type from the submenu.

QualityPatrol Test Methods

Search test methods... [Search] [Reset]

Test Property: Any | Data Type: Any | Facility: Any | Test Type: Any | Timing: Any | Status: Active | Operation: Any | Overview: Any | Workcenter: Any

Page: 1 2 3 4 5 6 7 ... 893 [Go]

Type	Property	Test Method / Name	Ur
AT	Allergen	0005 New Test 005f	Attribute
VS			Variable (Single Input)
VM			Variable (Multiple Input)
α	Allergen	1	Alphanumeric

Buttons: + New Test Method

c. Enter the information as applicable and click 'Save Changes.'

**Note:** Click on the Help Icons in the user interface for more information.

- i. Status – Check the checkbox to make the test method active. Uncheck the checkbox to make the test method inactive.
- ii. Test Property – Select the applicable test property from the dropdown.



- iii. **R** Number – Enter the test method number.
- iv. Name – Enter the test method name.
- v. Alternate Number – Enter the alternate test method number. If an alternate number is entered (e.g. an ASTM reference as opposed to the locally used test method name), then the alternate method number will appear on all CoAs containing the test method.
- vi. Alternate Name – Enter the alternate test method name. If an alternate name is entered, then the alternate name will appear on all CoAs containing the test method.
- vii. Description – Enter the test method description.
- viii. Work Instruction – Enter the exact network path (typically starts with http:// or https://) to the corresponding work instruction. The path needs to provide access to the document using a browser. If a URL is provided, then QualityPatrol users will be able to open the work instruction via a hyperlink.

**Note:** Linking directly to a file download on a different website will likely not work in modern browsers due to security concerns.
- ix. Test Type – Choose the test type.
- x. **R** Required By – Choose the default party who typically requires the test method to be performed. Note that this can be changed in quality plan when the quality plan is built.
- xi. Delayed Testing – Choose whether the test method is delayed. Delayed test methods take a significantly longer time to complete than other test methods.
- xii. Control Class – Choose the applicable control class. Click on the **?** Help Icons in the user interface to see the definition of each control class.
- xiii. Unit of Measure – Choose the applicable unit of measure that will apply to all results for the test method. **Note:** This field applies only to variable test methods.
- xiv. Decimal Places – Enter the number of decimal places that will apply to all results for the test method. **Note:** This field applies only to variable test methods.

The screenshot shows the configuration interface for a test method. The 'Test Property' is set to 'Allergens-QA'. The 'Number' field contains '5'. The 'Test Type' is 'Product Characteristic'. The 'Required By' is 'Customer'. The 'Delayed Testing' is 'Inherit from Test Property'. The 'Control Class' is 'Not Considered'. The 'Unit of Measure' is 'Dollars (\$)'. The 'Decimal Places' is '1'. The 'Save Changes' button is circled in red.



## Test Method Work Instructions

This section applies to all test method types (alphanumeric, attribute, variable single-input, variable multi-input).

There are two ways to associate a test method with a work instruction:

- I) Link to file via Network Path. On the General tab of the desired test method, click the 'Edit' button.

The screenshot shows the 'General' tab of a test method configuration. The 'Test Property' is 'Chemical'. The 'Number' is 'SAA-2102-Moisture-Dried-Sample-Time'. The 'Name' is 'Moisture Dried Sample Time'. The 'Test Type' is 'Product Characteristic'. The 'Required By' is 'Customer'. The 'Delayed Testing' is 'Delayed. This test requires more time than usual to complete. (Inherited)'. The 'Control Class' is 'Inherit [Standard]'. The 'Work Instruction' field is empty. The 'Work Instruction File' section has an 'Upload' button. The 'Facilities' section shows 'Santa Ana'. The 'Quality Plans' section has a 'Quality Plans' button. The 'Edit' button is circled in red.

- a. In the Work Instruction cell, enter the exact network path (typically starts with http:// or https://) to the corresponding work instruction, then click the 'Save Changes' button.

**Note:** The path needs to enable a user to open the document via a browser. If a working URL is provided, then QualityPatrol users will be able to open the work instruction via a hyperlink.

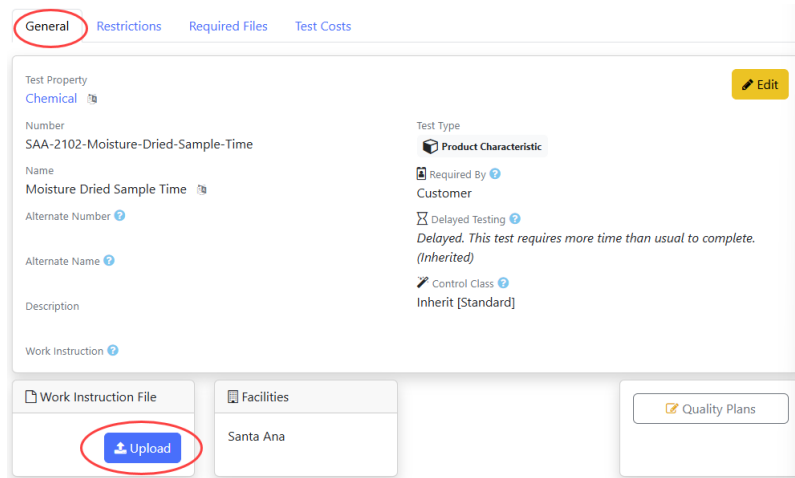
The screenshot shows the 'General' tab of a test method configuration. The 'Test Property' is 'Chemical'. The 'Number' is 'SAA-2102-Moisture-Dried-Sample-Time'. The 'Name' is 'Moisture Dried Sample Time'. The 'Test Type' is 'Product Characteristic'. The 'Required By' is 'Customer'. The 'Delayed Testing' is 'Inherit from Test Property'. The 'Control Class' is 'Inherit [Standard]'. The 'Work Instruction' field is empty. The 'Status' is 'Active'. The 'Save Changes' button is circled in red. The 'Work Instruction' field is circled in red.

- II) Upload file. On the General tab of the desired test method, click the Work Instruction File 'Upload' button.

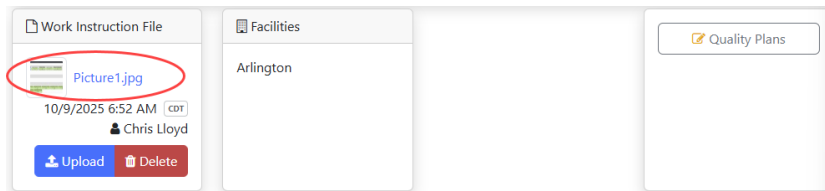
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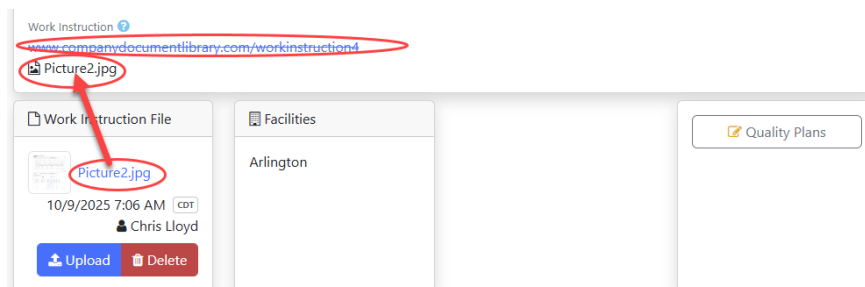
- Select a work instruction file (e.g. DOC, JPG, PDF) from a network location and click the 'Open' button.
- The file will be uploaded, and the file name and thumbnail can be clicked to view the file.



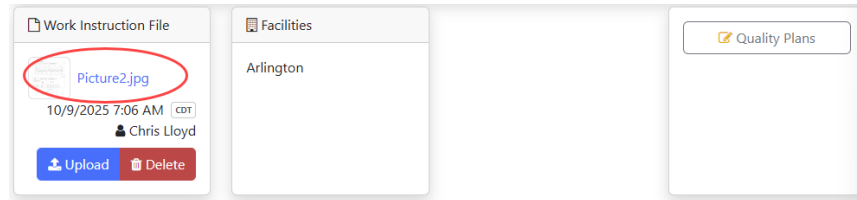
**Note:** Only one file can be uploaded at a time.

**Note:** If both a network path is defined and a file is uploaded, QualityPatrol will open the uploaded file when users click on the work instruction hyperlink.

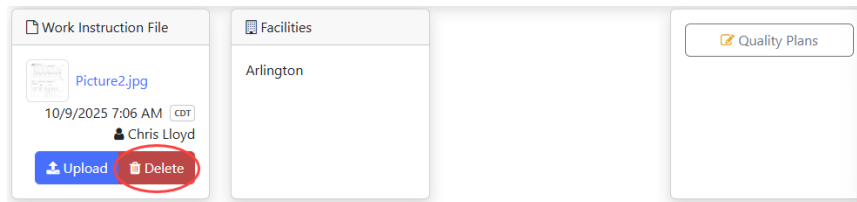
**Note:** If a network path is defined and a file is uploaded, then the network file path will be displayed in strikethrough text to indicate that it is being overwritten by the uploaded file. Additionally, the name of the uploaded file is displayed in the Work Instruction.



- To replace a file with a new file, click the 'Upload' button, select a work instruction file (e.g. DOC, JPG, PDF) from a network location, and click the 'Open' button. The most recent file will replace the previous file.



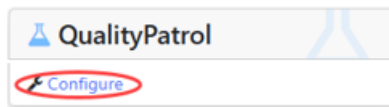
d. To delete a file, click the 'Delete' button and click the 'Delete' button in the confirmation window.



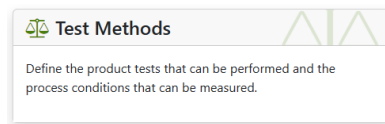
## Test Method - General Tab

This section applies to all test method types (alphanumeric, attribute, variable single-input, variable multi-input).

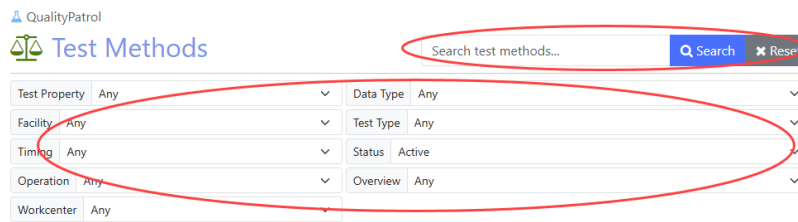
59. To edit the information in the General tab, click on Configure in the QualityPatrol card on the PatrolSuite homepage.



a. Click on the Test Methods card.



b. Use the Search command or the filters to locate the desired test method.



c. Click on the test method number.

# QualityPatrol – Configure

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QualityPatrol

### Test Methods

Search test methods...

Test Property	Chemical	Data Type	Alphanumeric
Facility	Any	Test Type	Any
Timing	Any	Status	Active
Operation	Any	Overview	Any
Workcenter	Any		

Type	Property	Test Method / Name	Units	Decimals	Cost
	Chemical	SAA-2102-Moisture-Dried-Sample-Time Moisture Dried Sample Time		0	0.00

d. On the General tab, click the 'Edit' button.

Tests Methods > 5

Test Method

**VM 5** Active

**General** Specifications Monitoring Sample Locations Restrictions Required Files Test Costs

Test Property: Allergens-QA

Number: 5

Name: [Empty]

Alternate Number: [Empty]

Alternate Name: [Empty]

Description: [Empty]

Work Instruction: [Empty]

Test Type: Product Characteristic

Required By: Customer

Delayed Testing: Not Delayed (standard) (Inherited)

Control Class: Inherit [None]

Unit of Measure: Dollars (\$)

Decimal Places: 1

Work Instruction File

Facilities: This test method has not been associated with any facilities.

DashPatrol: Facility Overview

e. Edit the fields as desired and click the 'Save Changes' button.

**Note:** Click on the Help Icons for information regarding each field.



General Restrictions Required Files Test Costs

Test Property: Chemical

Number: SAA-2102-Moisture-Dried-Sample-Time

Name: Moisture Dried Sample Time

Alternate Number: [Empty]

Alternate Name: [Empty]

Description: [Empty]

Work Instruction: [Empty]

Status:  Active

Save Changes Cancel

Test Type:  Product Characteristic  Process Parameter

Required By: Customer

Delayed Testing:  Inherit from Test Property  Delayed. This test requires more time than usual to complete.  Not Delayed (standard)

Control Class:  Inherit [Standard]  Not Considered  Standard  Essential  Preventive

## Test Method - Specifications Tab

This section applies to variable single-input and variable multi-input test method types.

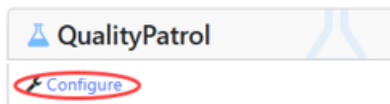
QualityPatrol supports a multi-level specification structure:

- i. **Test Specifications:** Specifications at this level apply to all test results for the test method, if product and customer specifications have not been defined.
- ii. **Product Specifications:** Specifications for the test method are dependent on the product.
- iii. **Product/Partner Specifications:** Specifications for the test method are dependent on the product and the business partner (e.g. customer or supplier).

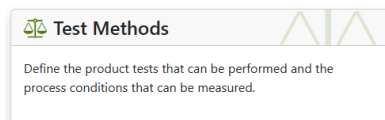
**Note:** Partner specifications that are defined using a “parent” partner number apply to all locations of the parent partner.

**Note:** Partner specifications that are defined using a partner location number (not a parent partner number) apply only to that specific location.

60. To view the test method specifications, click on Configure in the QualityPatrol card on the PatrolSuite homepage.



- a. Click on the Test Methods card.



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b. Use the Search command or the filters to locate the desired test method.

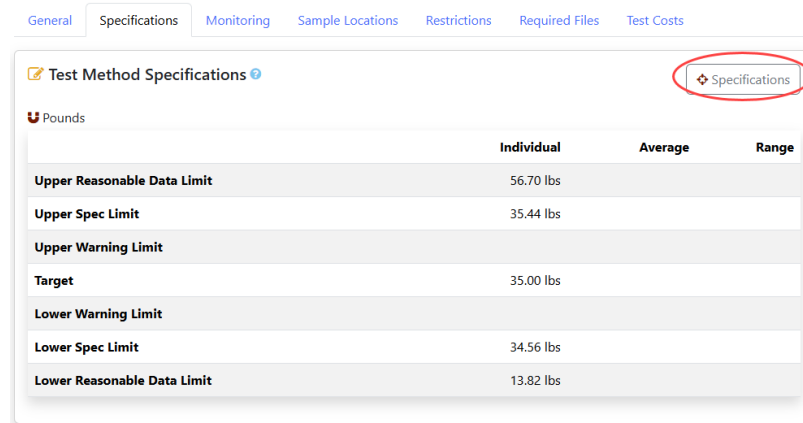
c. Click on the test method number.

d. Click on the Specifications tab. Specifications defined at the test method level, if any, will be displayed.

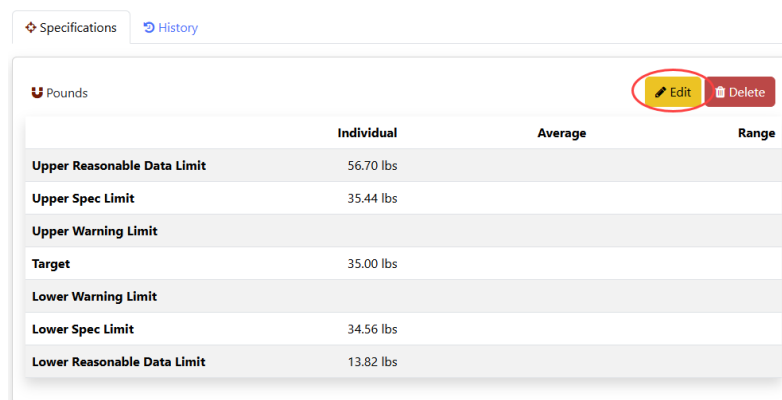
**Note:** Variable single-input (VSI) test methods will have only “Individual” specs.

**Note:** Variable multi-input (VMI) test methods will have “Individual,” “Average,” and “Range” specs.

61. To edit a test method with existing test method specifications, click on the ‘Specifications’ button.



a. Click on the 'Edit' button.



b. Enter the new specifications, document the reason for changing the specifications, and click the 'Save Changes' button.

**Note:** There should not be a Product or Customer chosen. Only the test method.

**Note:** Variable single-input test methods will have only the "Individual" column.

**Individual Spec** – Applies to V-SI and V-MI test methods. Defines the specification for each individual value entered into QualityPatrol.

**Average Spec** – Applies to V-MI test methods. Defines the specification for the calculated average value of the individual results entered into QualityPatrol.

**Range Spec** – Applies to V-MI test methods. Defines the specification for the calculated range value of the individual results entered into QualityPatrol.

**Reasonable Data Limits** – Applies to V-SI and V-MI test methods. Identifies the permissible range within which test results are considered valid. The purpose of these limits is to identify grossly erroneous entries (i.e. "fat-fingers") before the data is saved. These limits affect QualityPatrol Samples & Testing only, and do not appear on the CoA.

**Note:** To calculate the upper and lower specs based on a % of the target, use the "+/-" and "%" fields and then click the 'Calculate Individual Specs' button.

**Note:** To calculate the reasonable data limits based on a factor of the target, enter the target value and



then click on the 'Target x \_' buttons.

**Note:** To calculate the apply the Individual specs to the Average, click the 'Copy Individual' button.

**Test Method Specification** ?

Test Method:

Product:

Customer:

Specifications [History](#)

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

	Individual	Average	Range
Upper Reasonable Data Limit	56.70		
Upper Spec Limit	35.44		
Upper Warning Limit			
Target	35.00		
Lower Warning Limit			
Lower Spec Limit	34.56		
Lower Reasonable Data Limit	3.82		

%

Reason for Change

62. To view an audit trail of changes to the test method specifications, click the History tab.

[Specifications](#) [History](#)

Revision 2 Source: QualityPatrol Chris Lloyd

	Individual	Average	Range
Upper Reasonable Data Limit			
Upper Spec Limit	100.00		
Upper Warning Limit			
Target	90.00		
Lower Warning Limit			
Lower Spec Limit	From 99.00 To 80.00		
Lower Reasonable Data Limit			

Reason for Change: Change lower spec to 80.0 at customer's request. Active Date: 10/9/2025 5:07 PM CDT

63. To define specifications for a test method that does not have any existing test method specifications, click on the 'Specifications' button.

**Note:** There should not be a Product or Customer chosen. Only the test method.

**Note:** Variable single-input test methods will have only the "Individual" column.

**Individual Spec** – Applies to V-SI and V-MI test methods. Defines the specification for each individual

# QualityPatrol – Configure

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value entered into QualityPatrol.

**Average Spec** – Applies to V-MI test methods. Defines the specification for the calculated average value of the individual results entered into QualityPatrol.

**Range Spec** – Applies to V-MI test methods. Defines the specification for the calculated range value of the individual results entered into QualityPatrol.

**Reasonable Data Limits** – Applies to V-SI and V-MI test methods. Identifies the permissible range within which test results are considered valid. The purpose of these limits is to identify grossly erroneous entries (i.e. “fat-fingers”) before the data is saved. These limits affect QualityPatrol Samples & Testing only, and do not appear on the CoA.

**Note:** To calculate the upper and lowers specs based on a % of the target, use the “+/-” and “%” fields and then click the ‘Calculate Individual Specs’ button.

**Note:** To calculate the reasonable data limits based on a factor of the target, enter the target value and then click on the ‘Target x \_’ buttons.

**Note:** To calculate the apply the Individual specs to the Average, click the ‘Copy Individual’ button.

General Specifications Monitoring Sample Locations Restrictions Required Files Test Costs

Test Method Specifications

Dollars

	Individual	Average	Range
Upper Reasonable Data Limit			
Upper Spec Limit			
Upper Warning Limit			
Target			
Lower Warning Limit			
Lower Spec Limit			
Lower Reasonable Data Limit			

a. Click on the ‘Add New Spec’ button.

Specifications History

Dollars

	Individual	Average	Range
Upper Reasonable Data Limit			
Upper Spec Limit			
Upper Warning Limit			
Target			
Lower Warning Limit			
Lower Spec Limit			
Lower Reasonable Data Limit			

b. Enter the new specifications, document the reason for changing the specifications, and click the ‘Save Changes’ button.



Specifications History

Dollars

Save Changes Cancel

	Individual	Average	Range
Upper Reasonable Data Limit	<input type="text"/>	<input type="text"/>	<input type="text"/>
Upper Spec Limit	<input type="text"/>	<input type="text"/>	<input type="text"/>
Upper Warning Limit	<input type="text"/>	<input type="text"/>	<input type="text"/>
Target	<input type="text"/>	<input type="text"/>	<input type="text"/>
Lower Warning Limit	<input type="text"/>	<input type="text"/>	<input type="text"/>
Lower Spec Limit	<input type="text"/>	<input type="text"/>	<input type="text"/>
Lower Reasonable Data Limit	<input type="text"/>	<input type="text"/>	<input type="text"/>

Reason for Change

64. To view an audit trail of changes to the test method specifications, click the History tab.

Specifications History

Revision 2 Percent Source QualityPatrol Chris Lloyd

	Individual	Average	Range
Upper Reasonable Data Limit			
Upper Spec Limit	100.00		
Upper Warning Limit			
Target	90.00		
Lower Warning Limit			
Lower Spec Limit	From 99.00 To 80.00		
Lower Reasonable Data Limit			

Reason for Change: Change lower spec to 80.0 at customer's request. Active Date 10/9/2025 5:07 PM

## NEW Test Method - Monitoring Tab: DashPatrol Alarms & SPC Charts

This section applies to attribute, variable single-input, variable multi-input test method types. Alphanumeric test methods cannot be monitored in DashPatrol.

The Monitoring tab enables management of the test methods' monitoring settings in DashPatrol. Note that these Test Method settings can be overridden in a Test Plan.

# QualityPatrol – Configure

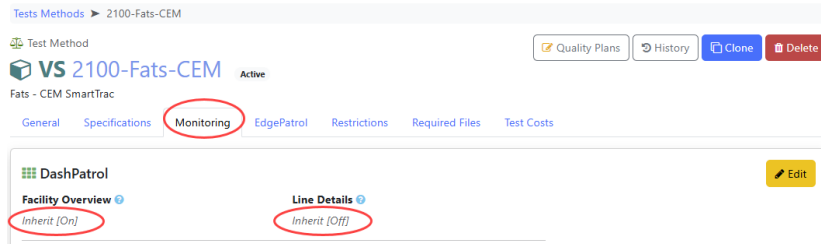
## User Guide

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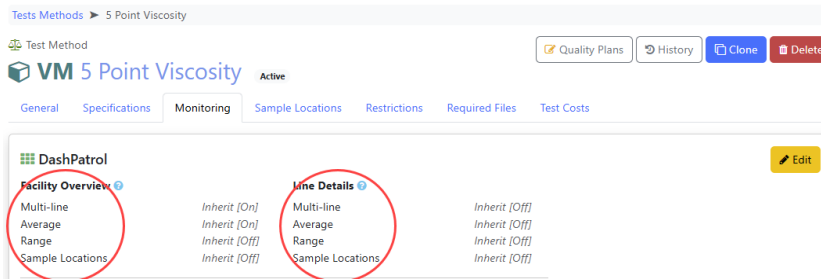


65. To edit the DashPatrol monitoring settings, open the desired test method (from the QualityPatrol/Configure/Test Methods page).

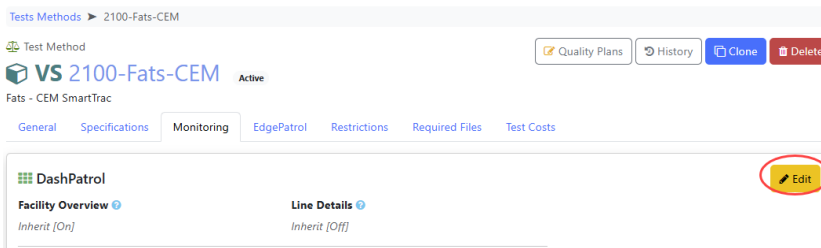
- a. Click the Monitoring tab. By default, the monitoring settings for the test method are inherited from the applicable test property. As can be seen below, a **VSI** test method was chosen, and an alarm button for this test method will appear on the Facility Overview page, but will not appear on the Line Details page.



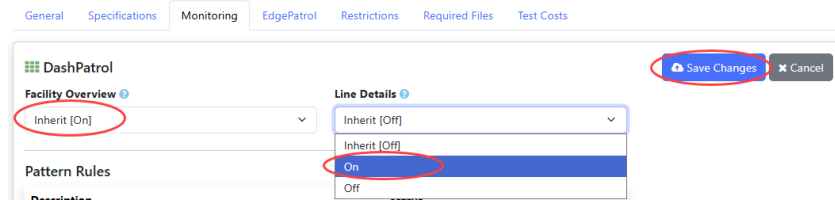
**Note:** If a **VMI** test method were chosen, then the VMI monitoring options will appear:



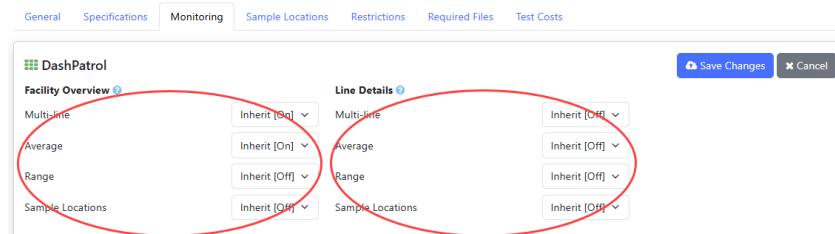
- **Multi-line** – If on, then an alarm button that represents the multi-line chart will appear.
  - **Average** – If on, then an alarm button that represents the average values will appear.
  - **Range** – If on, then an alarm button that represents the range values will appear.
  - **Sample Locations** - If on, then an alarm button will appear for all individual sample locations.
- b. Click the 'Edit' button.



- c. Choose whether the test method appears in the DashPatrol Facility Overview or Line Details pages, and click the 'Save Changes' button.



**Note:** If a **VMI** test method were chosen, then the VMI monitoring options will appear:

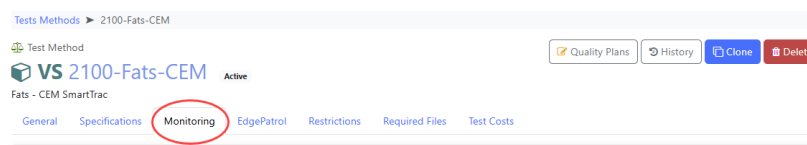


## **NEW** Test Method - Monitoring Tab: DashPatrol Pattern Rules

This tab enables the configuration of variable single-input (VSI) and variable multi-input (VMI) test method's statistical pattern rules in DashPatrol. Note that these Test Method settings can be overridden in a Test Plan.

66. To edit the DashPatrol pattern rule settings, open the desired test method (from the QualityPatrol/Configure/Test Methods page).

a. Click the Monitoring tab.



b. The state of each pattern rule is displayed in the Pattern Rules section.

- **On:** The pattern rule is in use for the test method and pattern rule violations will be displayed in DashPatrol.
- **Off:** The pattern rule is not in use for the test method, even if it is On at the Facility or Test Property level. Such pattern rule violations will not be displayed in DashPatrol even if they occur.
- **Inherit from Test Property (On or Off):** The pattern rule setting is inherited from the applicable Test Property, which has been set to On or Off. Changes to the setting at the Test Property will affect the Test Method setting.
- **Facility:** The pattern rule setting is inherited from the applicable Test Property, which is set to inherit the setting from the Facility. Click on the Facility text to see the state for each facility. Changes to the setting at the Facility will affect the Test Method setting.



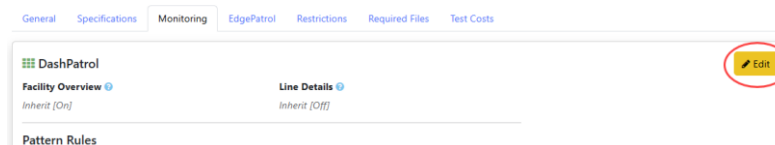
Pattern Rules

Description	Status
5 Consecutive points increasing or decreasing	● On
6 Consecutive points increasing or decreasing	● Inherit from Test Property (On)
7 Consecutive points increasing or decreasing	● Off
4 out of 5 points beyond 1 standard deviation	▼ Facility ● Arlington (On) ● Brunswick (Off) ● Crest-Hill (Off)

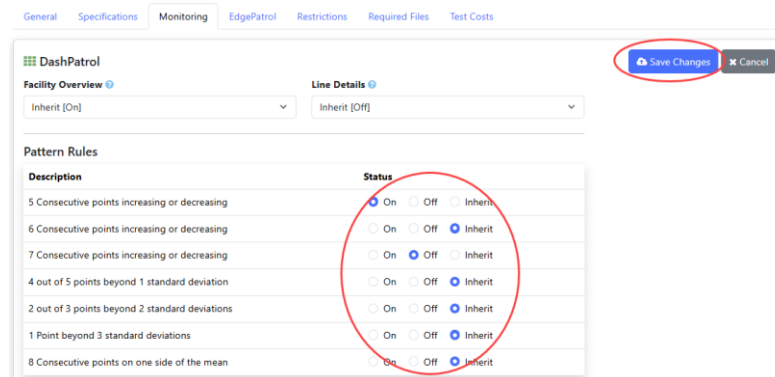
**Note:** Attribute test methods do not have settings for statistical pattern rules.

**Note:** Variable test methods have three options for statistical pattern rules.

c. Click the 'Edit' button.



d. Click the radio button for the desired pattern rule to turn it on, off, or to inherit it's status from the applicable Test Property settings and click 'Save Changes.'

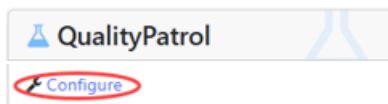


## Test Method – Attribute Options Tab

This section applies only to attribute test method types.

**AT** Attribute test results represent qualitative data measured in discrete units (e.g. Pass or Fail). The discrete units are the “attribute options.”

67. To view the attribute options for a test method, click on Configure in the QualityPatrol card on the PatrolSuite homepage.



a. Click on the Test Methods card.



**Test Methods**

Define the product tests that can be performed and the process conditions that can be measured.

b. Use the filters to find the desired test method and click on the test method number.

Testing

### Test Methods

Search test methods... Search Reset

Test Property: Any Data Type: Attribute

Facility: Any Test Type: Any

Timing: Any Status: Active

1 2 3 4 5 6 7 ... 162 Page Go + New Test Method

Type	Test Method	Units	Decimals	Cost
AT	15123			1.13
AT	17243		0	0.00
AT	ARL-1100-Startup-Checklist <small>Confirm that the Startup Checklist was completed and is signed</small>			0.00

c. Click on the Attribute Options tab.

**Note:** Each attribute option has a “Pass” or “Fail” state. A test method can have multiple “Pass” options and multiple “Fail” options.

General Monitoring **Attribute Options** Restrictions Required Files Test Costs

Edit

Attribute Options

Option	State
Fail	Fail
Pass	Pass

68. To edit the attribute options for a test method, click on the Attribute Options tab and then click the ‘Edit’ button.

General Monitoring **Attribute Options** Restrictions Required Files Test Costs

Edit

Attribute Options

Option	State
Fail	Fail
Pass	Pass

- Click on the “Pass” or “Fail” radio button to make the option selectable as the result of a test.
- Click on the “Not Applicable” radio button to make the option not selectable as the result of a test
- Click the ‘Save Changes’ button.

**Note:** The test method’s list of potential attribute options is defined in the Test Property for which the test method belongs.



**Note:** By default, the attribute options are 'Not Applicable.'

Tests Methods > ARL-6200-Color

Test Method

**AT ARL-6200-Color** Active

Color - Visual Standard

General Monitoring **Attribute Options** Restrictions Required Files Test Costs

Save Changes Cancel

**Attribute Options**

Option	State	Pass	Fail
Fail	<input type="radio"/> Not Applicable	<input type="radio"/> Pass	<input checked="" type="radio"/> Fail
Pass	<input type="radio"/> Not Applicable	<input checked="" type="radio"/> Pass	<input type="radio"/> Fail
1 = Color	<input checked="" type="radio"/> Not Applicable	<input type="radio"/> Pass	<input type="radio"/> Fail
1=Too Light	<input type="radio"/> Not Applicable	<input type="radio"/> Pass	<input checked="" type="radio"/> Fail

## Test Method – Sample Locations Tab

This section applies only to variable multi-input (VMI) test method types.

69. On the Sample Location tab, click the 'Edit' button to define the applicable sample locations and number of tests.

Tests Methods / 4000-8F-OK1-8

Test Method

**VM Weights 4000-8F-OK1-8** Active

ARL-4000-Weight-Bag-8F-OK1-8oz

General Specifications Monitoring **Sample Locations** Restrictions Required Files Test Costs

Sample Locations

Select the physical location on the sample where testing is to be performed, and the number of tests required.

Sample Location	Number of Tests
<input type="checkbox"/> TI-Filler 05	2
<input type="checkbox"/> TI-Filler 06	1
<input type="checkbox"/> TI-Filler 07	2

Edit

a. Check the checkbox for the applicable sample locations, enter the number of tests required for the corresponding location, and click 'Save Changes.'

Tests Methods / 4000-8F-OK1-8

Test Method

**VM Weights 4000-8F-OK1-8** Active

ARL-4000-Weight-Bag-8F-OK1-8oz

General Specifications Monitoring **Sample Locations** Restrictions Required Files Test Costs

Sample Locations

Select the physical location on the sample where testing is to be performed, and the number of tests required.

Sample Location	Number of Tests
<input checked="" type="checkbox"/> TI-Filler 05	2
<input checked="" type="checkbox"/> TI-Filler 06	1
<input checked="" type="checkbox"/> TI-Filler 07	2
<input type="checkbox"/> Unit 1	
<input type="checkbox"/> Unit 2	
<input type="checkbox"/> Unit 3	

Save Changes Cancel



## Test Method – Restrictions Tab

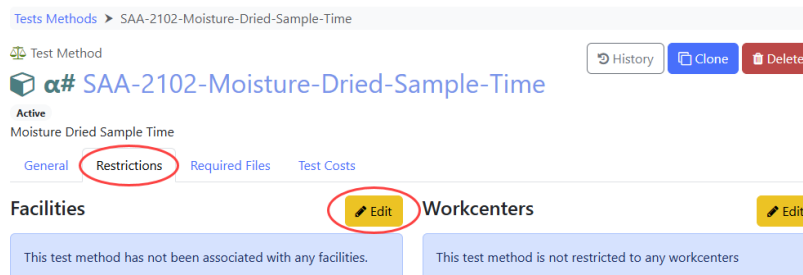
This section applies to all test method types.

**Note:** By default, test methods are associated with all facilities (i.e. they are not “restricted” to one or more facility). This means the test method can be consumed in any test plan related to any operation. Restricting a test method to a related facility makes building quality plans easier because the user can filter to see only those test methods related the applicable facility.

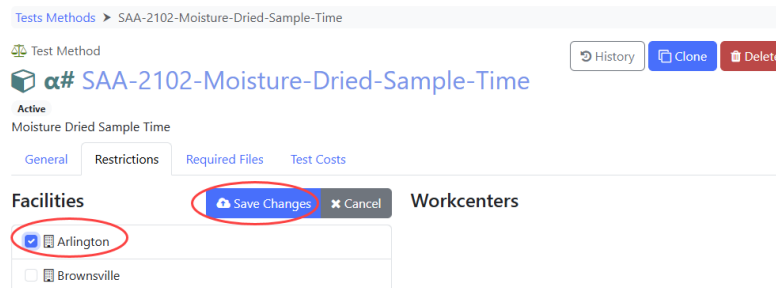
**Note:** Restricting a test method to a facility also enables the successful implementation of security by facility (contact your quality admin if you are not familiar with this capability). If security by facility is implemented, then a user may be able to see only those test methods related to his/her facility.

**Note:** Restricting a test method to a facility also enables the use of the Facility filter on the Search Test Methods page.

70. To restrict the test method to a Facility, click on the Restrictions tab of the desired test method, and then click the Facilities ‘Edit’ button.

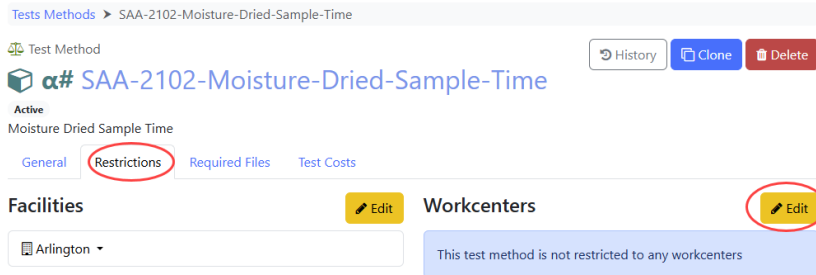


a. Select the facilities to which the test method is restricted and click the ‘Save Changes’ button.

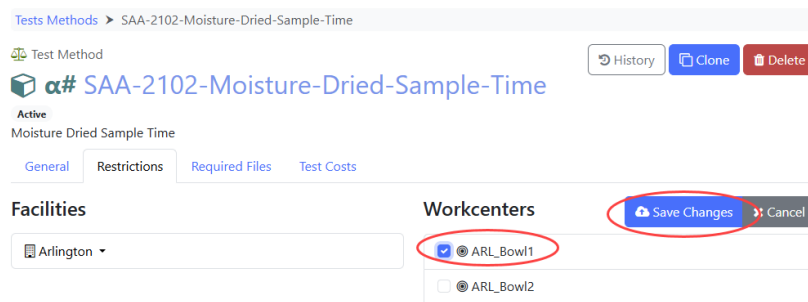


71. To restrict the test method to a workcenter, click the Workcenters ‘Edit’ button.

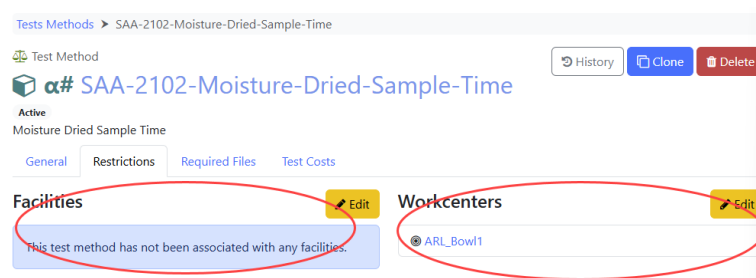
**Note:** By default, test methods associated with a facility are also associated with all workcenters at that facility (i.e. they are not “restricted” to one or more workcenters at that facility). This means the test method can be consumed in any test plan related to any operation at that facility.



- a. Choose the workcenters to which the test method is restricted and click the 'Save Changes' button.



**Note:** As can be seen in the image below, restricting a test method to a workcenter does not automatically also restrict it to the related facility. Typically, the test method is first restricted to the applicable facility, and then to the applicable workcenters.

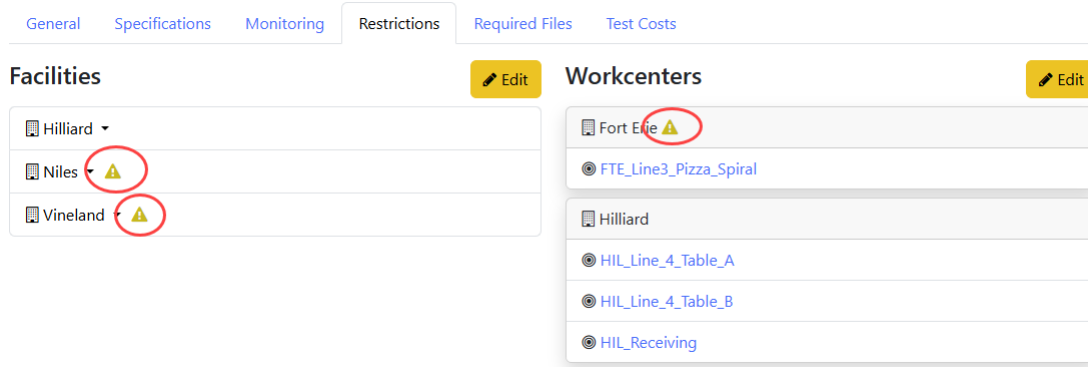


## Restriction Warnings

There are two types of restriction warnings in the image below.

**Facility Restriction Warning.** These facility restrictions will be ignored throughout PatrolSuite because this test method is restricted to one or more workcenters that are not from the Niles or Vineland facility. To fix this problem, either remove the Niles and Vineland facility restrictions or restrict this test method to one or more workcenters from Niles and Vineland.

**Facility Restriction Warning.** The workcenter restriction for the Fort Erie facility will be ignored throughout PatrolSuite because this test method is restricted to one or more facilities, but not Fort Erie. To fix this problem, either remove the workcenter restriction for Fort Erie or add Fort Erie to the facility restrictions.



## Restriction Use Case

By default, test methods are associated with all workcenters (i.e. they are not “restricted” to one or more workcenter). Restricting a test method to a workcenter enables quality plans to be built in a way that applies test methods to the sample based on sample’s workcenter. See the use case below.

**Use Case:** Product 123 is made at Operation 86. Operation 86 has three workcenters. Each workcenter is a different type of machine that does the same thing. However, because the machines are not the same make and model, the target and specifications for ‘Test Method A’ is different for each workcenter. The quality admin has two options for defining and managing quality plans:

1. Create three Operations: 86a, 86b, and 86c. Then build three test plans for Product 123, one for each operation. Then define the applicable spec for Test Method A in each test plan. Creating multiple operations to accommodate one product is not desirable because it increases the number of test plans that must be managed.
2. Keep the single Operation 86. Create three test methods: Test Method A – WC1, Test Method A – WC2, and Test Method A – WC3. Restrict Test Method A – WC1 to workcenter #1. Restrict Test Method A – WC2 to workcenter #2. Restrict Test Method A – WC3 to workcenter #3. Build one test plan that contains all three Test Method As. Define the target and specs for the test methods. When a sample is initiated for workcenter #1, QualityPatrol will automatically include Test Method A – WC1 in the sample’s required testing, and will exclude Test Method A – WC2, and Test Method A – WC3 from the sample.

## Test Method – Required Files Tab

This section applies all test method types.

The Required Files tab defines whether a file must be uploaded in a QualityPatrol sample before the test results can be saved.

72. To edit the required files for a test method, click on Configure in the QualityPatrol card on the PatrolSuite homepage.

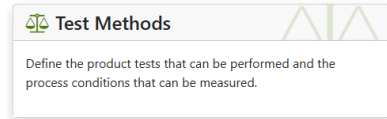
# QualityPatrol – Configure

## User Guide

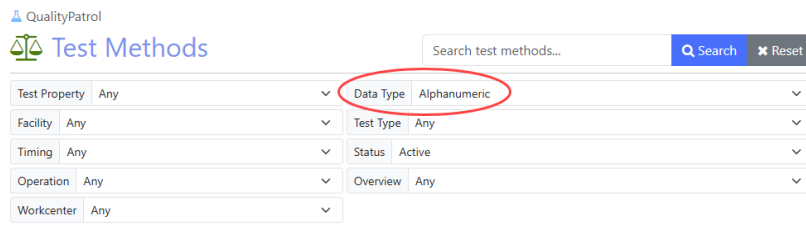
Version 2026-04



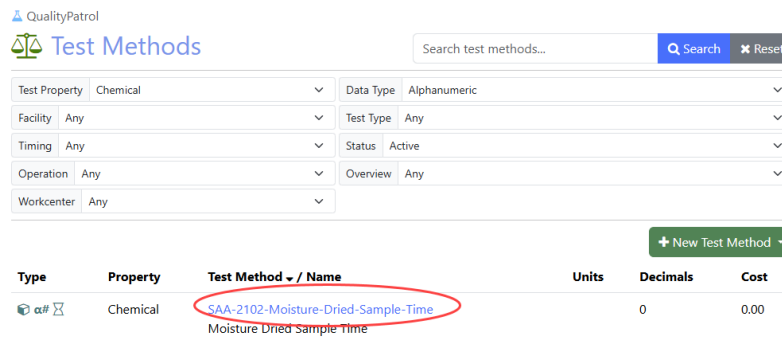
a. Click on the Test Methods card.



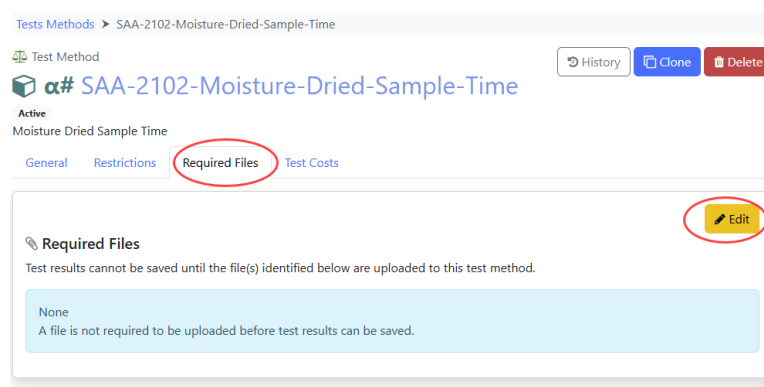
b. Use the filters to locate the desired test method.



c. Click on the test method number.



d. Click on the Required Files tab, then click the 'Edit' button.



e. Enter the number of required files, the file description, and click 'Save Changes.'



General Restrictions **Required Files** Test Costs

+ Add Required File **Save Changes** ✕ Cancel

**Required Files**  
Click on Add Required File to define the file(s) that must be uploaded to the test method before test results can be saved. Note that multiple files can be required.

Number of Files	Description	Status	
1	Spectrophotometer Image	<input checked="" type="checkbox"/> Active	<input type="button" value="Remove"/>

- f. To require a user to upload an additional file before the user is allowed to save the results, click the 'Edit' button again, enter the number of required files, the file description, and click 'Save Changes.'

General Restrictions **Required Files** Test Costs

+ Add Required File **Save Changes** ✕ Cancel

**Required Files**  
Click on Add Required File to define the file(s) that must be uploaded to the test method before test results can be saved. Note that multiple files can be required.

Number of Files	Description	Status	
1	Spectrophotometer Image	<input checked="" type="checkbox"/> Active	<input type="button" value="Remove"/>
1	Spreadsheet containing the actual data	<input checked="" type="checkbox"/> Active	<input type="button" value="Remove"/>

**Note:** The need to upload multiple files can be done at the same time by clicking the 'Add Required Files' more than once.

General Restrictions **Required Files** Test Costs

+ Add Required File **Save Changes** ✕ Cancel

**Required Files**  
Click on Add Required File to define the file(s) that must be uploaded to the test method before test results can be saved. Note that multiple files can be required.

Number of Files	Description	Status	
1	Spectrophotometer Image	<input checked="" type="checkbox"/> Active	<input type="button" value="Remove"/>
1	Spreadsheet containing the actual data	<input checked="" type="checkbox"/> Active	<input type="button" value="Remove"/>
1		<input checked="" type="checkbox"/> Active	<input type="button" value="Remove"/>
1		<input checked="" type="checkbox"/> Active	<input type="button" value="Remove"/>

## Test Method – Test Costs Tab

This section applies to all test method types.

The Test Costs tab captures the cost of completing a test method one time. This information is essential for accurately calculating the organization's Cost of Quality.

73. To define the costs incurred to perform a test method one time, click on Configure in the QualityPatrol card on the PatrolSuite homepage.

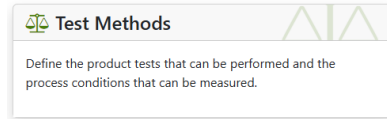
# QualityPatrol – Configure

## User Guide

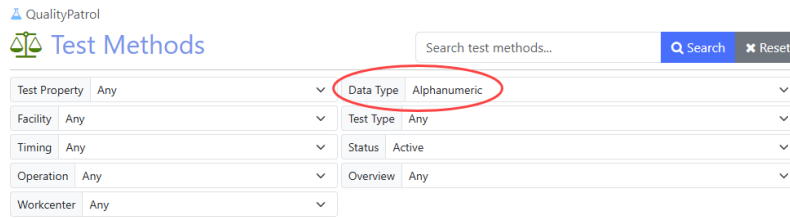
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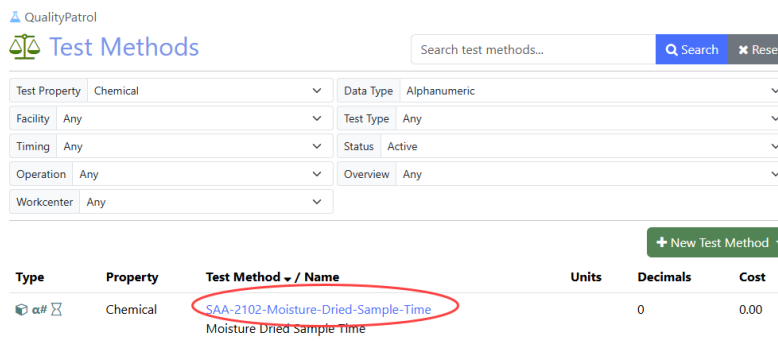
a. Click on the Test Methods card.



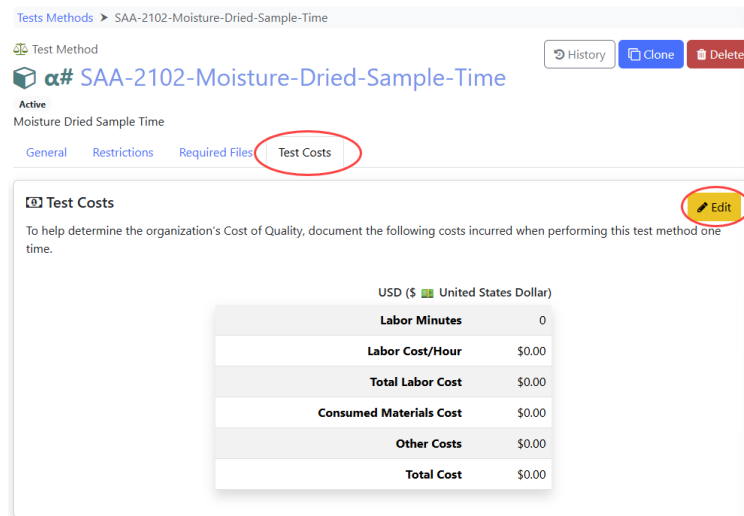
b. Use the filters to locate the desired test method.



c. Click on the test method number.



d. Click on the Test Costs tab, then click the 'Edit' button.



# QualityPatrol – Configure

## User Guide

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- e. Select the applicable currency.
- f. Enter the number of Labor Minutes required to perform the test. **Note:** This is not the total duration of minutes from test start to test end (e.g. a test that takes 34 minutes to perform may consume only 12 minutes of labor).
- g. Enter the Labor Cost/Hour. **Note:** Contact a manager in the Finance or HR department to get an average \$/hour cost (including benefits) for employees who perform testing in manufacturing and in the QC laboratory.
- h. Enter the Consumed Materials Cost. **Note:** This is the cost of all materials consumed (and destroyed) if the test method is destructive) to perform the test.
- i. Enter any Other Costs that need to be accounted for when performing this test. **Note:** Common other costs include equipment maintenance costs, equipment calibration costs, sample disposal costs, and utility costs (electric, heat, water).

Tests Methods > SAA-2102-Moisture-Dried-Sample-Time

Test Method History Clone Delete

**α# SAA-2102-Moisture-Dried-Sample-Time**

Active  
Moisture Dried Sample Time

[General](#) [Restrictions](#) [Required Files](#) [Test Costs](#)

**Test Costs** Save Changes Cancel

To help determine the organization's Cost of Quality, document the following costs incurred when performing this test method one time.

Currency	Choose...	
<b>Labor Minutes</b>	<input type="text"/>	0
<b>Labor Cost/Hour</b>	\$ <input type="text"/>	0.0000
<b>Consumed Materials Cost</b>	\$ <input type="text"/>	0.0000
<b>Other Costs</b>	\$ <input type="text"/>	0.0000



# Chapter 14 Test Sources

## Introduction

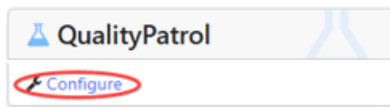
Test sources are consumed in quality plans to identify the party that requires each test to be performed. See page: {PatrolSuite URL}/Quality/TestSources

Users with the following permission can edit test sources.

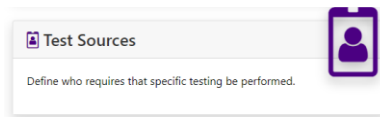
Manage Test Sources	Allows users to configure test sources.
---------------------	---

## View

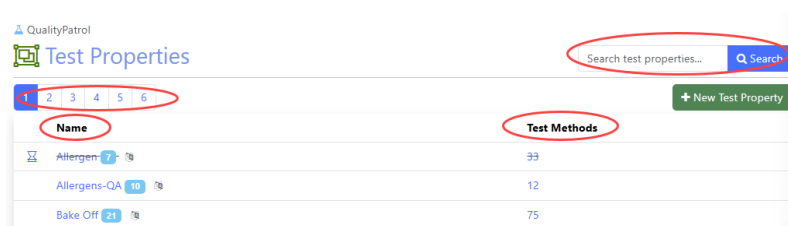
74. To view the existing test sources, click on Configure in the QualityPatrol card on the PatrolSuite homepage.



a. Click on the Test Sources card.



b. To search for a test source, enter the name and click the 'Search' button or use the paging feature. Additionally, the columns can be sorted by clicking on the column headers.



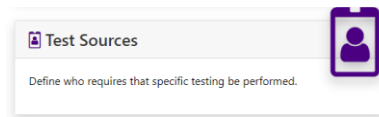


## Add New

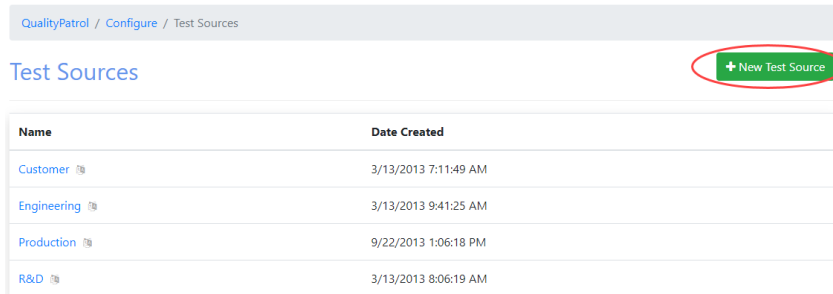
75. To add a new test source, click on Configure in the QualityPatrol card on the PatrolSuite homepage.



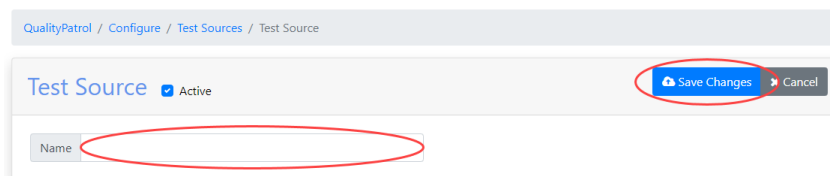
a. Click on the Test Sources card.



b. Click the 'New Test Source' button.



c. Enter the test source name and click the 'Save Changes' button.



**Use Case:** In an ideal world, all the test methods in the quality plan for Product 123 are there because they are required by the customer. It is normal for a small number of additional tests to be required by the quality department to minimize Beta risk (the risk of shipping bad product to the customer). If this was where the definition of testing requirements stopped, all would be good. However, in the typical manufacturing organization, requests for additional testing are made over the years by other parts of the organization such as manufacturing, engineering, R&D, regulatory, and even sales. Eventually, a quality plan that began with 10 test methods 10 years ago now has 22 test methods. The test source and test cost features of QualityPatrol give the quality department a way to stop other departments from increasing the cost of quality at the expense of the quality department's budget. How? At the end of each year, the quality department can calculate the actual costs of the, for example, six additional test methods for Product 123 that were requested by the R&D department. When R&D receives the intra-company invoice asking for reimbursement, the quality department will find out quickly whether those six additional tests are truly needed. The result is a win for the entire organization because it reduces the overall cost of quality.



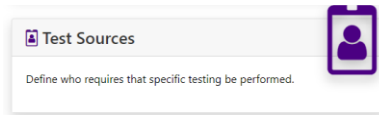
---

## Edit

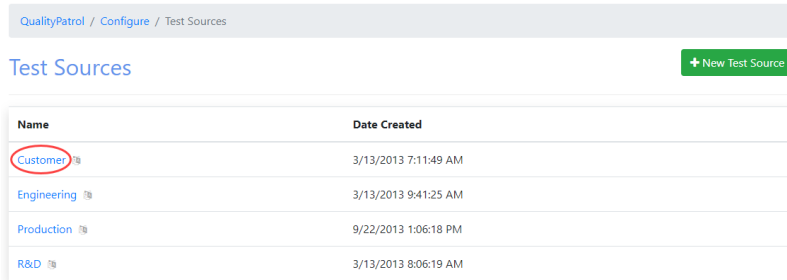
76. To edit an existing test source, click on Configure in the QualityPatrol card on the PatrolSuite homepage.



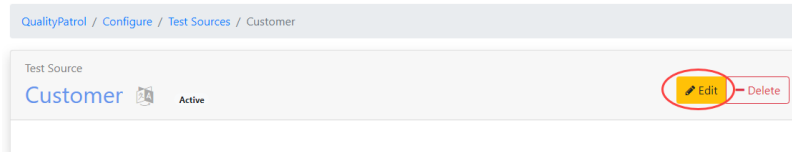
a. Click on the Test Sources card.



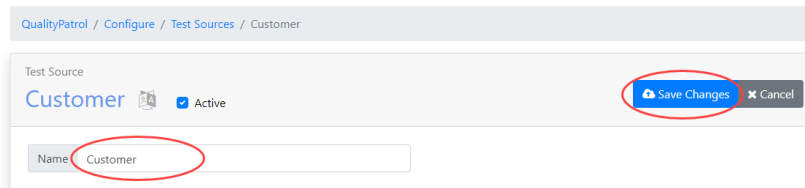
b. Click on the desired test source name.



c. Click on the 'Edit' (or 'Delete') button.



d. Edit the test source name and click 'Save Changes.'



---

## Localize

77. To translate the test source name into other languages:

a. Click the translation icon for the desired test source.

# QualityPatrol – Configure

## User Guide

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QualityPatrol / Configure / Test Sources

Test Sources + New Test Source

Name	Date Created
Custom	3/13/2013 7:11:49 AM
Engineering	3/13/2013 9:41:25 AM
Production	9/22/2013 1:06:18 PM
R&D	3/13/2013 8:06:19 AM

b. Click the 'Edit' button.

Text Translation

Source Text  
Customer

This text has not been translated.

c. Enter the translation for the required languages and click 'Save Changes.' Click the Back text in the menu to return to the test sources page.

PatrolSuite MAP Dev Christopher

Edit Data Translation Save Changes Cancel

Source Text  
Customer

Language	Text
Chinese	<input type="text" value="顾客"/>
Dutch	<input type="text" value="Klant"/>
English	<input type="text"/>
French	<input type="text" value="Client"/>
German	<input type="text" value="Kunde"/>



---

# Chapter 15: Units of Measure

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## Introduction

A Unit of Measure (UoM) is a standard used to quantify and compare physical quantities, enabling consistent measurement across processes and systems.

All QualityPatrol test methods have a (single) UoM. UoMs are also consumed in ComplaintPatrol and Nonconforming Product to identify the amount of product that is defective.

See page: {PatrolSuite URL}/Quality/UnitsOfMeasure

 Users with the following permission can edit units of measure.

 Yes	Manage Units of Measure	Allows users to configure units of measure.
---	-------------------------	---

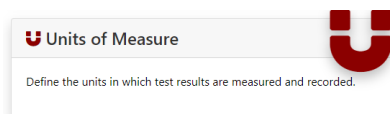
---

## View

78. To view the existing units of measure, click on Configure in the QualityPatrol card on the PatrolSuite homepage.



a. Click on the Units of Measure card.



b. To find a unit of measure, enter the name and click the 'Search' button or use the paging feature. Additionally, the columns can be sorted by clicking on the column headers.

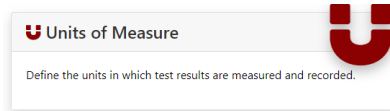
---

## Add New

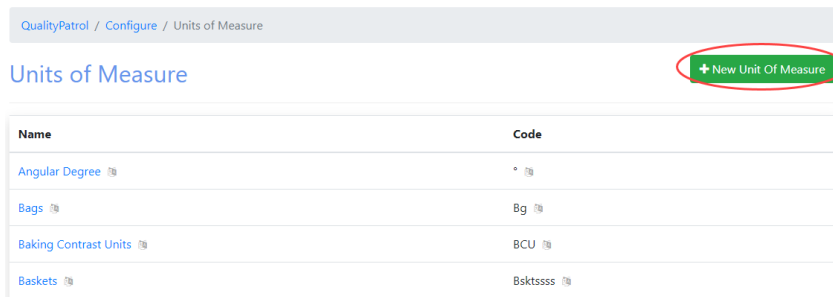
79. To add a new unit of measure, click on Configure in the QualityPatrol card on the PatrolSuite homepage.



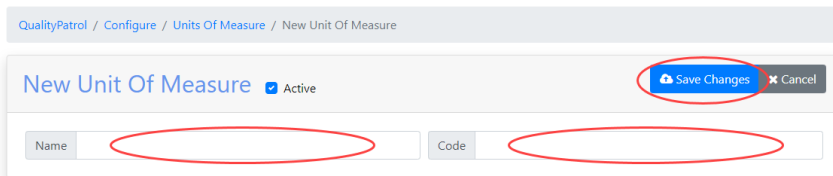
- a. Click on the Units of Measure card.



- b. Click the 'New Unit of Measure' button.



- c. Enter the UoM name and code and click 'Save Changes.'



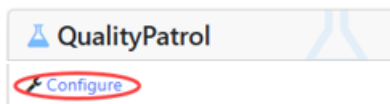
**Note:** The name should be descriptive enough to enable a user who doesn't recognize the code to identify the UoM. If possible, avoid using symbols in the name. For example, in a UoM name, use "gram" instead of "g."

**Note:** The UoM name does not appear on a CoA.

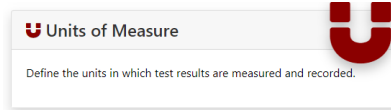
**Note:** The UoM code appears on the CoA. The code should use the commonly recognized symbols (if any).

## Edit

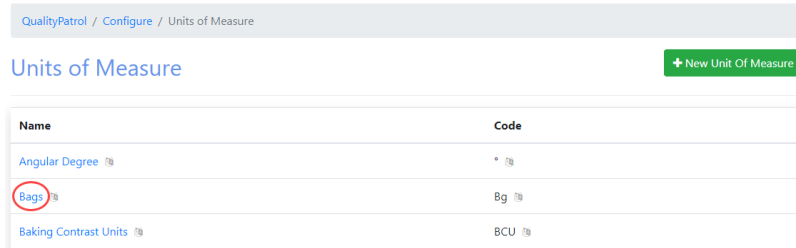
80. To edit a unit of measure, click on Configure in the QualityPatrol card on the PatrolSuite homepage.



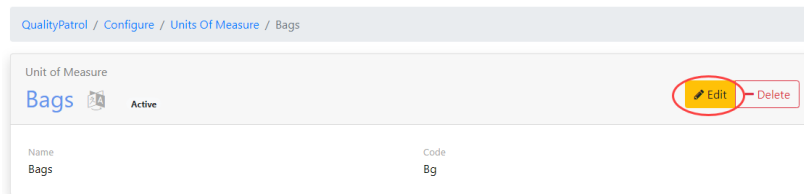
- a. Click on the Units of Measure card.



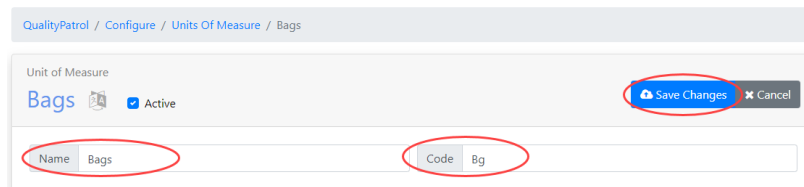
b. Click on the UoM name.



c. Click on the 'Edit' (or 'Delete') button.

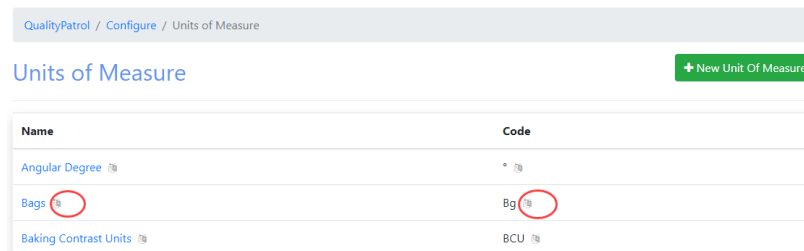


d. Edit the UoM name and code and click 'Save Changes.'



## Localize

81. To translate the UoM name or UoM code into other languages, click the translation icon for the desired UoM name or code.



a. Click the 'Edit' button.



Text Translation Edit

Source Text  
Bags

Language	Text
German	Taschen

- b. Enter the translation for the required languages and click 'Save Changes.' Click the Back text in the menu to return to the UoM page.

**M A P** Data Systems PatrolSuite Back MAP Dev Christopher

Edit Data Translation Save Changes Cancel

Source Text  
Bags

Language	Text
Chinese	<input type="text" value="包"/>
Dutch	<input type="text" value="Tassen"/>
English	<input type="text"/>
French	<input type="text" value="Sacs"/>
German	<input type="text" value="Taschen"/>