



EventPatrol

Search Events

Product, customer, or order

Search

☐ My Events

Source

Any

Facility

Any

Reset Filters

Additional Filters

1

2

Event Due	Source Value	Category Subcategory	Facility Department	Product Number / Product Name Customer Number / Customer Name
4 Definition 3/8 12/20/2020 CST	Complaint 1 €372.00 EUR		Nile Research	Event 22
8 Definition 5/7 2/14/2022 CST	Complaint 131		Mis...	BWK Nonconforming Product 31141-0
9 Definition 4/5 3/16/2022 CDT	Complaint 125 €23,200.00 EUR	Delivery Wrong Location	San...	
10 Definition 4/5 3/18/2022 CDT	Complaint 113 €19,775.00 EUR	Product Packaging Damaged	For...	
13 Definition 1/3 10/1/2022 CDT	Complaint 130		Chic Mainte...	
20 Definition 0/2 12/10/2022 CST	10 4.1.2 Verify that the ...	Manufacturing Line Coat P1	Bru...	
22 Definition 0/4 2/20/2023 CST	1 BWK Nonconforming ... \$11,760.00 USD	Nonconforming P... Rework into Same ...	Nile Manuf...	
14 Definition 2/3 2/27/2023 CST	Complaint 136	Delivery Late	Nile	
17 Definition 1/3 2/28/2023 CST	Complaint 135 R\$10,155.00 BRL	Delivery Late	Cre...	
18 Definition 0/1 2/28/2023 CST	10 4.1.1 Verify that the ...	Manufacturing Line Coat P1	Bru...	

Definition

Approval

Implementation

Closed

Category Nonconforming Product

Subcategory Rework into Same Product

Product failed color testing. ZL710 analysis suggests high temperature cause burning.

Tasks & Actions

Timeline

Files

Event Report

Tasks

Investigation
Christopher A
Wednesday, July 5th 2023

Root Cause Analysis
Craig L
Tuesday, April 25th 2023

Risk Assessment

Proposed Actions

Containment
Craig L
Wednesday, July 5th 2023

Safety

Correction
Christopher A
Saturday, June 24th 2023

Corrective

Actions Completed On Time - %

Actual 30.4%

Target 98%

Source - Category - Trigger Value

Complaints - Delivery - Early 100%

EventPatrol - Quality Control - Erroneous Test Result 67%

EventPatrol - Calibration - Failed 40%

65 Events

26 Actions Created

Definition 54

Approval 6

Implementation 1

Closed 4

Open 12

Closed 14

Source - Category - Trigger Value

Complaints - Delivery - Early 2

EventPatrol - Quality Control - Erroneous Test Result 1

EventPatrol - Calibration - Failed 21




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Chapter 1: Introduction

Introduction

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

Symbol Key

The following symbols are used in this user guide.

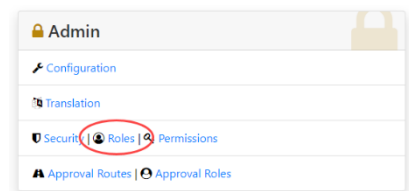
Typeface	Description
	Indicates a “required” data entry field within a UI.
	Indicates a new feature, or new information regarding existing functionality.
	Indicates rules regarding access security.
	Click the help icon to view additional information.

Browser

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

Roles

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





Security / Roles

All + Add New Role

Roles

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

- Contact your IT department and request that they create an Active Directory group for each of the above roles and that they associate each role with the Active Directory group.
- Provide the IT department with a list of all users who need to be added into each Active Directory group.

Note: Granting facility access is typically not done via an EventPatrol Role.

NEW Permissions

- MAP recommends granting permissions to each role as follows.

Note: The EventPatrol Dashboard queries can be resource intensive (i.e. network and server), so be thoughtful about what users are given permission to use the dashboard.

EventPatrol Dashboard

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

EventPatrol Manager

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



EventPatrol User


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

EventPatrol Viewer

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



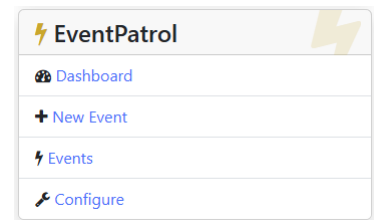
Chapter 2: Navigation

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

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

EventPatrol Card


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





Chapter 3: Configuration

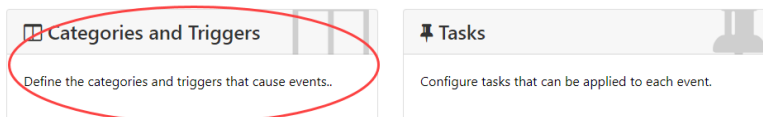
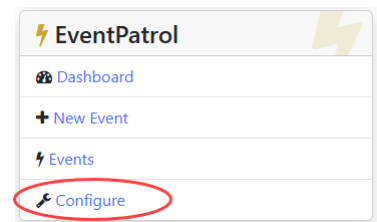
 Users with the following permission can view and edit the EventPatrol/Configure pages.

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

Categories

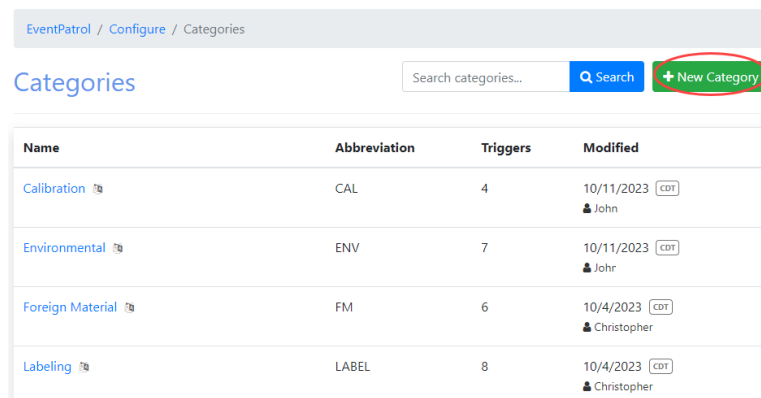
- Click on the “Configure” hyperlink in the EventPatrol card on the PatrolSuite homepage.
- Click on the Categories and Triggers card.

EventPatrol
[Configure](#)



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

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



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



EventPatrol / Configure / Categories / New Category

New Category ☒ Active Save Changes Cancel

Name Nonconforming Product

Abbreviation NCP

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

EventPatrol / Configure / Categories

Categories Search + New Category

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

12. To edit an existing category, click the category name hyperlink.

EventPatrol / Configure / Categories

Categories Search + New Category

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

a. Click the Edit button.

EventPatrol / Configure / Categories / Calibration / Caliper

Calibration

Caliper

Abbreviation CLPR

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

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

EventPatrol / Configure / Categories / Calibration / Caliper

Calibration

Caliper ☒ Active Save Changes Cancel

Name Caliper

Abbreviation CLPR

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

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



Triggers

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

EventPatrol / Configure / Categories

Categories [Search](#) [+ New Category](#)

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

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

Triggers [+ New Trigger](#)

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

15. Enter the trigger name and abbreviation and click Save Changes.

EventPatrol / Configure / Categories / Calibration /

New Subcategory ☒ Active [Save Changes](#) [Cancel](#)

Name

Abbreviation

16. To localize the trigger into other languages, click the localization icon and edit the desired languages.

Triggers [+ New Trigger](#)

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

17. To edit an existing trigger, click the trigger name hyperlink.



Triggers

+ New Trigger

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

- a. Click the Edit button.

EventPatrol / Configure / Categories / Calibration / Caliper

Calibration

Caliper

Edit Delete

Abbreviation CLPR

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

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

EventPatrol / Configure / Categories / Calibration / Caliper

Calibration

Caliper ☒ Active

Save Changes Cancel

Name Caliper

Abbreviation CLPR

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

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

Tasks

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

EventPatrol

Configure

Categories and Triggers

Define the categories and triggers that cause events..

Configure tasks that can be applied to each event.

19. Click on the desired Task name.



Tasks

Tasks

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

Tasks with Actions

Name	Allocated Hours ?	Required ?	Action Approval Required ?
Containment	120		
Safety	120		

20. Click the Edit button.

EventPatrol / Configure / Tasks / Investigation

Task

Investigation Active Edit

Allocated Hours ? 240

☐ Required ?

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

EventPatrol / Configure / Tasks / Investigation

Edit Task

Investigation ☒ Active Save Changes Cancel

Allocated Hours ? 240

☐ Required ?

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

EventPatrol / Configure / Tasks / Containment

Task

Containment Active Edit

Allocated Hours ? 120


☐ Required ?

☐ Action Approval Required ?



Chapter 4: New Event

 Users with the following permission can create new events.

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

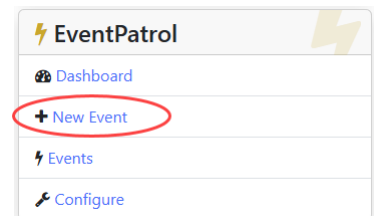
Event Sources

Events can currently originate from three modules within PatrolSuite:

- A. AuditPatrol. Each question in an audit can be related to one event. AuditPatrol events should be created only from within the AuditPatrol app.
- B. ComplaintPatrol. Each customer complaint can be related to one event. ComplaintPatrol events should be created only from within the ComplaintPatrol app.
- C. EventPatrol. **This chapter covers creating events from EventPatrol.**

New Event

- 23. Click on the “New Event” hyperlink in the EventPatrol card, or on the “New Event” hyperlink in the main menu of EventPatrol.
- 24. Enter the event title and select the other required fields shown in the image below. Enter additional information as applicable and click Save Changes.



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

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

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




Title

☒ Active

Description

Owner

 **Christopher**
Executive / Morristown
(630)
chris@map

- Required Field
- Required Field
- Required Field
- Required Field

Accessibility
☒ Public ☐ Private

Category

Facility

Manufacturing Line

Customer Number

Product Number

Sales Order

Quantity

Unit of Measure

Internal Reference

Trigger

Department

Workcenter

Supplier Number

Order Number

Purchase Order

Value

Currency

External Reference

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



Chapter 5: Search Events

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

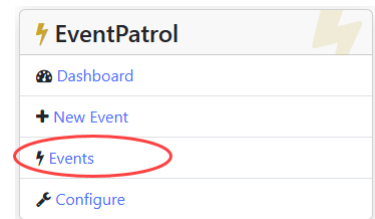
Yes

View

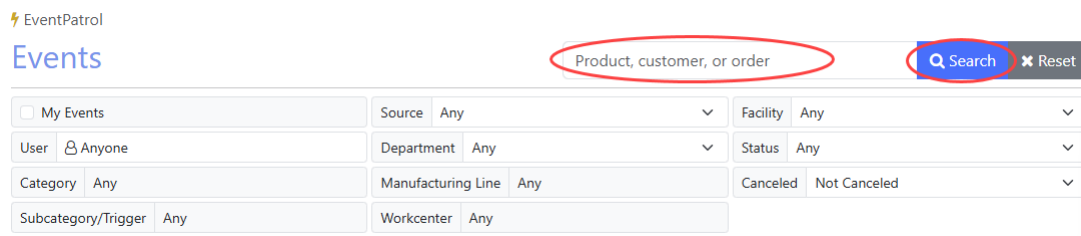
Allows users to view all events.

Event Search

25. Click on Events hyperlink in the EventPatrol card.



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

A screenshot of the EventPatrol Events search page. The page has a header with the EventPatrol logo and the word "Events". Below the header is a search bar with the placeholder text "Product, customer, or order" (circled in red). To the right of the search bar is a "Search" button (circled in red) and a "Reset" button. Below the search bar is a table of filters with columns for Source, Facility, User, Department, Status, Category, Manufacturing Line, Canceled, Subcategory/Trigger, and Workcenter.

Event Filters

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

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

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

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

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



- g. Manufacturing Line. After first choosing a facility, select a desired manufacturing line to view events only for the chosen manufacturing line.

Note: A Facility must be chosen before a manufacturing line or workcenter can be selected.

- h. Workcenter. After first choosing a facility, select a desired workcenter to view events only for the chosen workcenter.
- i. Status. Select the desired event status.
- j. Canceled. Select the desired cancellation status.

EventPatrol

Events

Product, customer, or order

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

Event Grid

28. Each event has two hyperlinks:

- a. The event number. Click this hyperlink to open the event Tasks page.
- b. The source. Click this hyperlink to open the event source page.

Event Next Due	Source Value	Category Subcategory/Trigger	Facility Department	Product Number / Product Name Customer Number / Customer Name
39 1/2 9/24/2023	70.4. Has the Defect / P...	Manufacturing Line Press 6	CrestHill	
28 6/9 6/24/2023	M - Insect Chicago Plant \$7,150.00 USD	Foreign Material Animal/Insect	CrestHill Manufacturing	0700430 12" TN... 0070020504 AC...
17 0/1 10/2/2023	Complaint 135 (R\$997,764.00) BRL	Delivery Late	CrestHill Manufacturing	15898 WM16TN... 0070020504 AC...

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

Download

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



EventPatrol

Search Events

Product, customer, or order

☐ My Events Any CrestHill

► Additional Filters

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

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

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

Notifications Information Security Settings AuditPatrol

Language

Use browser language

Theme

Use browser preferences

Time Zone

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

Navigation Bar

Dark

Downloads

Select File Type

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


The image blow shows the download data columns.

	A	B	C	D	E	F	G	H	I	J	K	L
1	EventId	Due	ItemType	EventValue	CategoryName	SubCategoryName	FacilityName	Department	ProductNumber	ProductName	CustomerNumber	CustomerName
2	39	9/25/2023 0:00	Audit		Manufacturing Line	Press 6	CrestHill					
3	28	6/25/2023 0:00	Event	7150	Foreign Material	Animal/Insect	CrestHill	Manufacturing	700430	12" TNB WIP CRUST	70020504	ACME Corporation
4	17	10/3/2023 0:00	Complaint	-997764	Delivery	Late	CrestHill	Manufacturing	15898	WM16TNBSUPPZ6/50.5Z	70020504	ACME Corporation









Chapter 6: Event Overview

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

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

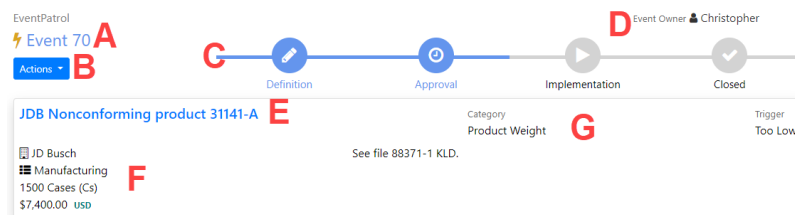
Event Header

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

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

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

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





Event Tabs

The event tabs are organized as follows:

- H. The information tabs.
 - i Tasks & Actions. Enables the tasks and actions to be managed.
 - ii Timeline. Click on the Timeline tab to see a breakdown of how long each event activity took to complete.
 - iii Files. Click on the Files tab to upload and to view files related to the event.
 - iv Event Report. Click on the Event Report tab to see an 8D-based report of the event activities.
 - v **NEW** Event Summary. Click on the Event Summary tab to see an “overview and progress” report of the event activities. The intended audience of this report is executives and management who need more detailed information than the Event Report provides.
- I. The tasks that can be assigned and completed. Typically, the Tasks are completed to inform the Event Owner before the Event Owner decides which Tasks with Actions to assign.
- J. The Tasks with Actions that can be proposed and completed.
- K. Task with Action Name. Click on the name to open the task.
- L. For those Tasks with Actions that have been assigned to a task leader, the number of actions and completed actions are shown here.
- M. The approval routes that can be chosen and completed.





Tasks & Actions


Timeline

HFiles


Event Report



Tasks



 Investigation 

 Christopher A. Lemp

✓ Complete

Tuesday, January 23rd 2024 

 Root Cause Analysis 

 Risk Assessment 

All tasks for this event have been assigned a few seconds ago

Approval **M**

+ Select Approval Route

Tasks with Actions

 **K** Containment 

 John Bowman

✓ All Actions Assigned

Tuesday, January 23rd 2024 

0/1 Actions Complete

Action 10219  John Telford  Overdue 1/20/2024 

 Safety 

 Correction 

 Corrective 

 Preventive 

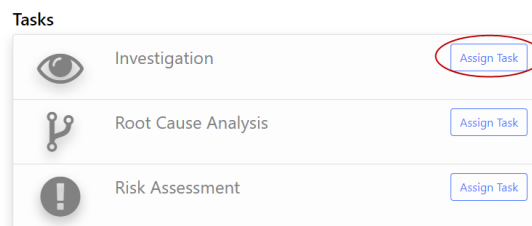
 Verification / Validation 



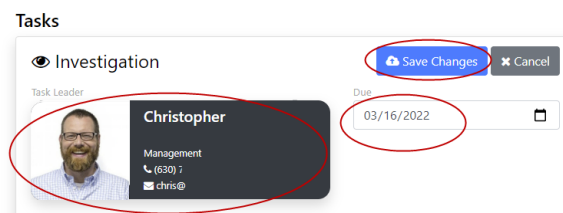
Chapter 7: Investigation

Investigation Task Assignment

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



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



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

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



36. Click on Investigation.

37. The investigation is organized into four activities:

- Problem Analysis
- Problem Statement
- Investigation Report






d. Recommendations

Note: None of these activities are “required.” It is up to the discretion of the investigator to use these tools appropriately based on the circumstances of the event. However, the investigator should consider the following:


- I. The problem statement and investigation report appear in the Event Report (and in the Investigation Report if the source is a customer complaint).
- II. Management may be asked to review and approve the results of the investigation before actions are defined and implemented.

Problem Analysis


38. The purpose of the Problem Analysis tab is to help the investigator document the data from which the problem statement will be created. On the Problem Analysis tab, click on the Edit button and:
- a Document the who, what, when, where, which, why, how, How Many, and How Often. Click on the help icon  for additional information regarding each section.
 - b Click the Save Changes button.





Problem Analysis Problem Statement Investigation Report Recommendations


Who? 
JDG Line 3


What? 
Cases below weight


When? 


Where? 

Which? 

Why? 

How? 

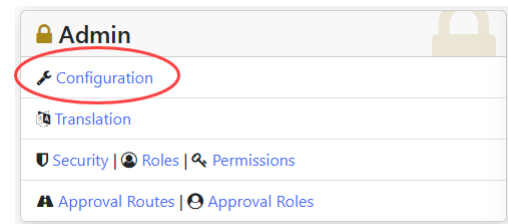
How Many? 


How Often? 

Edit



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

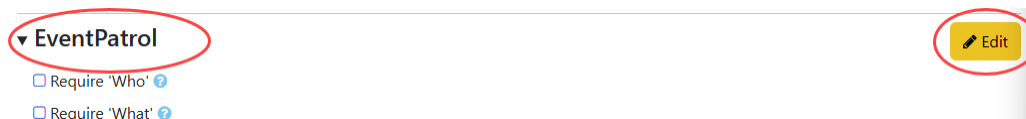


- NEW**  To manage EventPatrol configuration settings, users must be in a role that grants the following permission:

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

40. **NEW** Click on the EventPatrol text to expand the menu items.

41. **NEW** Click on the Edit button.



42. **NEW** Select the information that will be required for every problem analysis and click the Save Changes button.

Configuration [Up a Level ↑](#)

Edit

Select the Required Problem Analysis Information

☒ Require 'Who' [?](#)

☒ Require 'What' [?](#)

☐ Require 'When' [?](#)

☐ Require 'Where' [?](#)

☐ Require 'Which' [?](#)

☐ Require 'Why' [?](#)

☐ Require 'How' [?](#)

☐ Require 'How Many' [?](#)

☐ Require 'How Often' [?](#)

☐ Require Problem Statement [?](#)

☐ Require Investigation Report [?](#)

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



Problem Statement

43. Click on the Problem Statement tab and click the Edit button.

- Record the “Problem Statement (internal)”. This text is for an internal audience only. Click on the localization icon to localize the internal statement into the desired language(s).
- Record the “Problem Statement (external)”. This text is used if event information needs to be reported externally. For example, this text appears in the Investigation Report for customer complaints.

To use the internal statement as the external statement, click the Use Internal Problem Statement checkbox.

Note: The external statement will appear on the corresponding event/8D report. If no external statement exists, then the corresponding event/8D report will contain the internal statement.

- Click the Save Changes button.

Investigation Report

44. On the Investigation Report tab, click on the Edit button and:

- Record the “Investigation Report (internal)”. This text is for an internal audience only. Click on the localization icon to localize the internal report into the desired language(s).
- Answer the questions regarding procedures.
- Record the “Investigation Report (external)”. This text is intended to be used if event information needs to be reported externally. For example, this text appears on the Investigation Report for customer complaints.



To use the internal report as the external report, click the Use Internal Problem Report checkbox.

Note: The external report will appear on the corresponding event/8D report. If no external report exists, then the corresponding event/8D report will contain the internal report.

- d. Click the Save Changes button.

Recommendations

45. The purpose of the Recommendations tab is to enable the Investigator to communicate his/her recommendations regarding what to do next to the Event Owner. On the Recommendations tab, click on the Edit button and:
- Record any recommendations for corrective action.
 - Record any recommendations for preventive action.
 - Record any additional recommendations including checking the appropriate checkbox reflecting additional actions that are recommended as a result of the investigation. These recommendations will be reviewed and considered by the Event Owner as he/she decides what actions to take.
 - Click the Save Changes button.



Investigation Task Leader: Christopher Complete investigation

Problem Statement Investigation Report Recommendations

Correction Recommendations Edit

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

☐ Yes ☐ No ☒ Unknown

Prevention Recommendations

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

☐ Yes ☐ No ☒ Unknown

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

Additional Recommendations

<input type="checkbox"/> Root Cause Analysis	<input type="checkbox"/> Risk Assessment
<input type="checkbox"/> Containment Actions	<input type="checkbox"/> Safety Actions
<input type="checkbox"/> Improvement Actions	<input type="checkbox"/> Corrective Actions
<input type="checkbox"/> Preventive Actions	<input type="checkbox"/> CAPA actions with Effectiveness Assessment
<input type="checkbox"/> Close the event without further actions	<input type="checkbox"/> Engineering/manufacturing review
<input type="checkbox"/> Environmental review	<input type="checkbox"/> Financial review
<input type="checkbox"/> Health Hazard Analysis	<input type="checkbox"/> Human resources review
<input type="checkbox"/> Procedure review	<input type="checkbox"/> Product design review
<input type="checkbox"/> Product quality and specifications review	<input type="checkbox"/> Regulatory review

Complete the Investigation

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

Investigation Task Leader: Christopher Click when the investigation is complete

Problem Analysis Problem Statement Investigation Report Recommendations

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

Tasks

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



Chapter 8: Root Cause Analysis (RCA)

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

1. 5 Why's. This approach emphasis sequential thinking.
2. Fishbone diagram. This approach emphasizes categorical thinking.

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

Assign and Open the RCA Task

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

RCA Page Overview

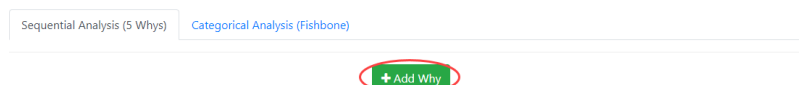
The RCA page is organized into two areas.

1. The summary information displays the problem statement and the chosen root causes. Additionally, the completion status of the task is managed here.
2. The RCA tabs (5 Whys and Fishbone).



5 Whys

48. Click on the "Sequential Analysis (5 Whys)" tab.
49. Click the Add Why button.





50. Document the Why. Optionally, document the rank (represents the likeliness of being the root cause), observable symptoms, comments, category, department (where the cause originated), and workcenter (where the cause originated).
51. If the Why is a root cause, check the Root Cause checkbox.
52. Click Save Changes. This will create the first “branch” (A) and the first Why (1).

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

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

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



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

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

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

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



Fishbone Diagram

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

Sequential Analysis (5 Whys) Categorical Analysis (Fishbone)

Environment + Add Cause

There are currently no potential causes for this category

Equipment + Add Cause

☑ Cause B1 In-line check weigher out of calibration B1

Rank 10 Symptoms The 10 pound standard measured 9.6 pounds Comments

Department Maintenance Workcenter ARL_Gallons 1/23/2024 CST Nobody

Measurement / Measurement Systems + Add Cause

There are currently no potential causes for this category

Materials + Add Cause

Cause A1 The wrong cartons were used A1

Rank 5 Symptoms Cartons were not filled to the top with liquid Comments

Department Manufacturing Workcenter ARL_Gallons 1/23/2024 CST Nobody

Cause A2 We were out of stock of the normal cartons A2

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

Department Manufacturing Workcenter ARL_Gallons 1/23/2024 CST Nobody

People / Training + Add Cause

There are currently no potential causes for this category

Paperwork / Procedures / Process + Add Cause

There are currently no potential causes for this category

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

People / Training + Add Cause

Name The wrong procedure was used to calibrate the check weigher ☑ Root Cause Save Changes Cancel

▼ Additional Information (optional)

Rank 10 - Most Liked Observable Symptoms Investigation evidence Comments The operator mistakenly used SOP 178854

Category People / Training Department Maintenance Workcenter ARL_Gallons

62. The new cause will appear.



People / Training + Add Cause

Cause C1 **The wrong procedure was used to calibrate the check weigher** C1

Rank 10	Symptoms Investigation evidence	Comments The operator mistakenly used SOP 178854.
Department Maintenance Workcenter ARL_Gallons		1/23/2024 CST Nobody

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

5 Whys – Moving Causes/Whys

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

Sequential Analysis (5 Whys) Categorical Analysis (Fishbone)

Branch A

Why 1 The wrong cartons were used A1

Rank 6	Symptoms Cartons were not filled to the top with liquid	Comments
Department Manufacturing Workcenter ARL_Gallons		1/23/2024 CST Nobody

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

Rank 6	Symptoms Wrong SKU; no stock in the warehouse	Comments
Department Manufacturing Workcenter ARL_Gallons		1/23/2024 CST Nobody

Branch B

Why 1 In-line check weigher out of calibration B1

Rank 10	Symptoms The 10 pound standard measured 9.6 pounds	Comments
Department Maintenance Workcenter ARL_Gallons		1/23/2024 CST Nobody

Branch C

Why 1 The wrong procedure was used to calibrate the check weigher C1

Rank 10	Symptoms Investigation evidence	Comments The operator mistakenly used SOP 178854.
Department Maintenance Workcenter ARL_Gallons		1/23/2024 CST Nobody

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

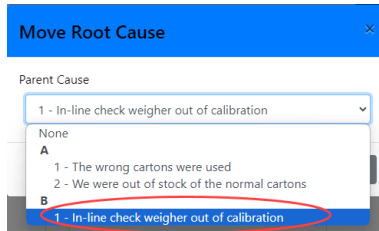
Branch C

Why 1 The wrong procedure was used to calibrate the check weigher C1

Rank 10	Symptoms Investigation evidence	Comments The operator mistakenly used SOP 178854.
Department Maintenance Workcenter ARL_Gallons		1/23/2024 CST Nobody

Edit
 + Add Why
 Move
 Delete

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



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

Sequential Analysis (5 Whys) | Categorical Analysis (Fishbone)

Branch A

Why 1 The wrong cartons were used A1

Rank 6	Symptoms Cartons were not filled to the top with liquid	Comments
Department: Manufacturing	Workcenter: ARL_Gallons	1/23/2024 CST Nobody

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

Rank 6	Symptoms Wrong SKU; no stock in the warehouse	Comments
Department: Manufacturing	Workcenter: ARL_Gallons	1/23/2024 CST Nobody

Branch B

Why 1 In-line check weigher out of calibration B1

Rank 10	Symptoms The 10 pound standard measured 9.6 pounds	Comments
Department: Maintenance	Workcenter: ARL_Gallons	1/23/2024 CST Nobody

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

Rank 10	Symptoms Investigation evidence	Comments The operator mistakenly used SOP 178854.
Department: Maintenance	Workcenter: ARL_Gallons	1/23/2024 CST Nobody

Completing & Reopening the RCA Task

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

Root Cause Analysis

Task Leader: Christophe

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

Click when the root cause analysis is complete

Root Causes

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

69. Click the Complete button in the confirmation window.

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

Root Cause Analysis

Task Leader: Christopher

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

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

Reopen icon



Chapter 9: Risk Assessment

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

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

Assign the Risk Assessment Task

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

Perform the Risk Assessment and Record the Results

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

Risk Assessment Task Leader: Christopher

Severity
None
Comments

Frequency
None
Comments

Occurrence Data
A defect occurrence has not been entered

Detectability
None
Comments

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



74. Select the applicable Frequency from the dropdown list and record how often this event has happened in the past. Add comments if necessary.
75. Select the applicable Detectability from the dropdown list. Add comments if necessary.
76. Click the Save Changes button.

Risk Assessment Task Leader: Christopher

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

Severity

(Select the severity...)

Comments

Frequency

(Select the frequency...)

Comments

Occurrence Data

This problem occurred times in the past

(Select Defect Frequency)

Detectability

(Select the detectability...)

Comments

77. Evaluate the Risk Priority Number (RPN). This provides a numerical index based on the risk assessment to determine if the risk is low, medium, high, or unacceptable. The Event Owner will use this information when considering whether corrective actions are necessary. The RPN scale is as follows. Contact MAP if you would like the scale revised for your organization.
 - a. 0-11 = Low (continue to measure and monitor)
 - b. 12-26 = Medium (corrective action should be considered)
 - c. 27-47 = High (corrective action is recommended)
 - d. >48 = Unacceptable (corrective action is required and preventive actions should be considered)
78. Click the Mark Task Complete once the risk assessment if finished and recorded.

Risk Assessment Task Leader: Christopher A. Lemp

Risk Priority Number **48**

Unacceptable risk. Corrective action is required.

[Mark Task as Complete](#) [Edit](#)



Chapter 10: Assign Tasks with Actions

Assign the remaining Tasks to a Task Leader

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

Tasks with Actions

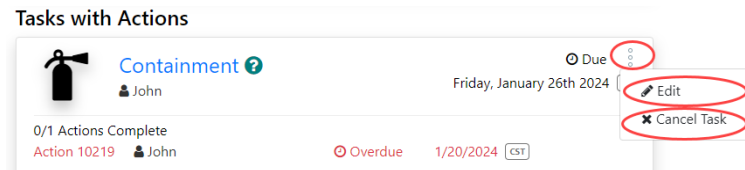
80. The following types of Tasks with Actions can be assigned:

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

Editing Existing Task Assignments



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

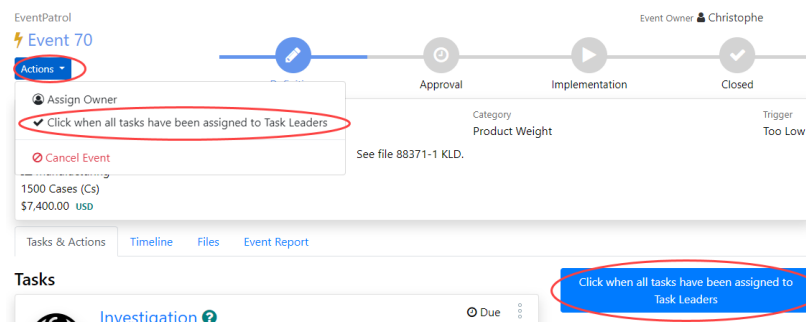


All Tasks Assigned

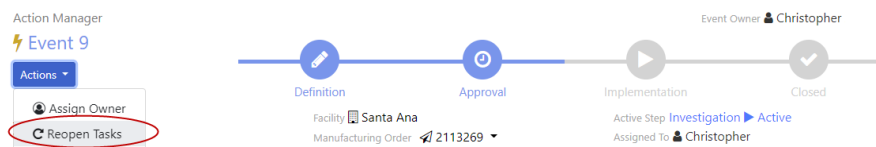
The Event Owner must indicate when all desired tasks have been assigned to a Task Leader. **The approval process cannot start until all tasks are marked as being assigned.**

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

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



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





Chapter 11: Defining & Assigning Actions

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

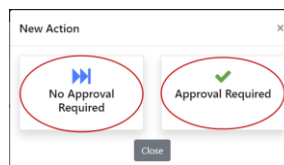
This chapter applies to all Tasks with Actions, as the management of each action is identical.

Defining and Assigning New Actions

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



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



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

A screenshot of the 'New Action' form. At the top, there are two radio buttons: 'No Approval Required' (selected) and 'Approval Required'. To the right are 'Save Changes' and 'Cancel' buttons, both circled in red. Below the radio buttons are two text input fields: 'Title' and 'Instructions', both circled in red. At the bottom, there is an 'Assigned To' dropdown menu showing 'Nobody' (circled in red) and a 'Due Date' field with a date picker (circled in red).



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

Containment

Task Leader: John

Show actions assigned to: (Anyone)

Click when all actions have been assigned

+ New Action

Place cases in quarantine area 51. Action 10219

Place all 125 cases in quarantine area 51 and label as HOLD.

Assigned To: John Date Due: 1/20/2024 7:00 AM (CST)

1/23/2024 10:27 AM (CST)

Upload Files

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

Containment

Task Leader: John

Show actions assigned to: (Anyone)

Click when all actions have been assigned

+ New Action

Editing Existing Actions

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

Containment

Task Leader: John

Show actions assigned to: (Anyone)

Click when all actions have been assigned

+ New Action

Place cases in quarantine area 51. Action 10219

Place all 125 cases in quarantine area 51 and label as HOLD.

Edit

Delete


Viewing Actions


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


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



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





 **Correction**



Task Leader  John

show actions assigned to
(Anyone) 



All action assignments completed
2022-03-10 2:01 AM  





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



Action 24  

Comments here



Assigned To
 Christopher
2022-03-10 2:23 PM 


Date Due
2022-03-10 5:00 PM 


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


Action 25  



Comments here

Assigned To
 Christopher
2022-03-10 2:23 PM 



Date Due
2022-03-09 8:00 AM 






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


Action 26  



Comments here

Assigned To
 Christopher
2022-03-10 2:23 PM 


Date Due
2022-12-03 10:00 AM 



Closed By
 John
2022-03-10 1:26 AM 


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



Action 27  

Comments here



Comment by  John Telford
Just couldn't be done

Assigned To
 Christopher
2022-03-10 2:24 PM 



Date Due
2022-12-03 10:00 AM 

Closed By
 John
2022-03-10 1:28 AM 


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

Action 28  

Comments here

Assigned To
 Donny
2022-03-10 2:29 PM 

Date Due





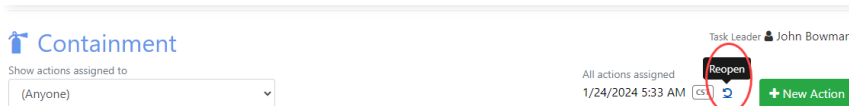
All Actions Assigned

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

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



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



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





Chapter 12: Approval

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

Selecting the Approval Route

93. Click on the Select Approval Route button.

Action Manager
Event 9
Complaint 125
Validity Inconclusive

Definition Approval Implementation Closed

Facility Santa Ana
Manufacturing Order 2113269

Event Owner Christopher
Active Step Investigation Active
Assigned To Christopher

Tasks

Investigation
Christopher
Completed
Tuesday, March 8th 2022

Approval
+ Select Approval Route

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

New Approval Attempt

Approval Route
Quality Approval

+ Create Cancel

Starting the Approval Route

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



Action Manager
Event 9

Complaint 125
Validity Inconclusive

Event Owner Christopher

Definition Approval Implementation Closed

Facility Santa Ana
Manufacturing Order 2113269

Active Step Investigation Active
Assigned To Christopher

Tasks

- Investigation (Completed Tuesday, March 8th 2022)
 - Root Cause Analysis
 - Risk Assessment

Approval

Quality Approval (Not Started)

Approvers Start

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

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

Tasks

- Investigation (Completed Tuesday, March 8th 2022)
 - Root Cause Analysis
 - Risk Assessment

Approval

Quality Approval (Not Started)

Save Changes Cancel

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

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

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

Tasks

- Investigation (Completed Tuesday, March 8th 2022)
 - Root Cause Analysis
 - Risk Assessment

Approval

Quality Approval (Not Started)

Save Changes Cancel

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

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

Tasks

- Investigation (Completed Tuesday, March 8th 2022)
 - Root Cause Analysis
 - Risk Assessment

Approval

Quality Approval (Not Started)

Approvers Start

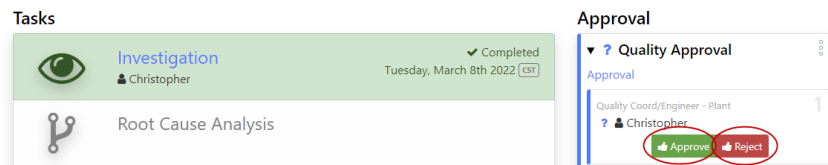
Quality Coord/Engineer - Plant	1
John	
Quality Manager - Corporate	2
Christopher	



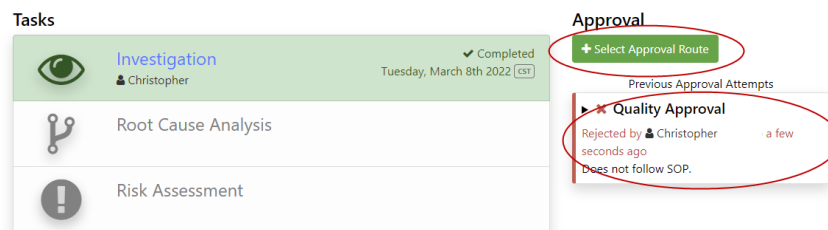
Approval or Rejection

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

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



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





Chapter 13: Implementation & Closure

Implementation Phase

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

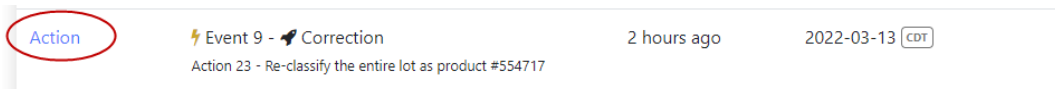


Action Completion by ARPs

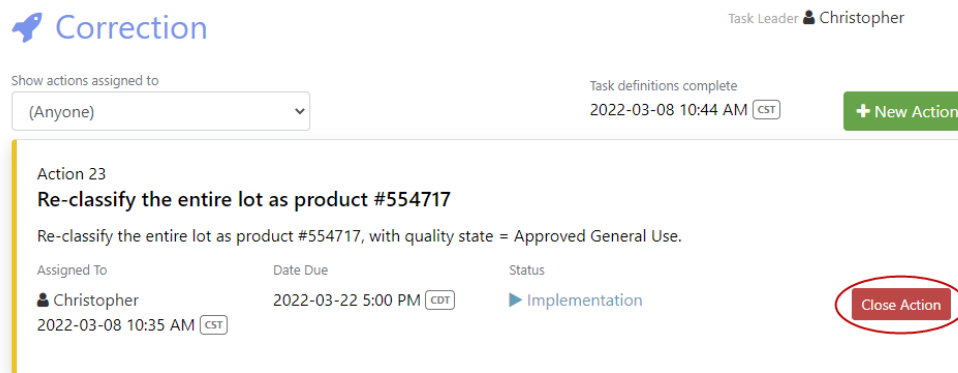
103. From the PatrolSuite homepage, click on My Tasks.



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



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



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



Close Action

Action 23

Select the outcome of this action

☒ Action complete

☐ Unable to complete

Comment

Close Action Cancel


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





NEW Chapter 14: Dashboard

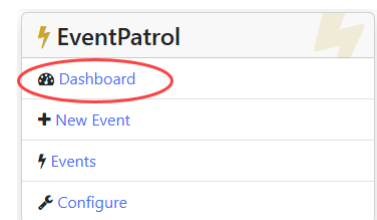
NEW Security

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

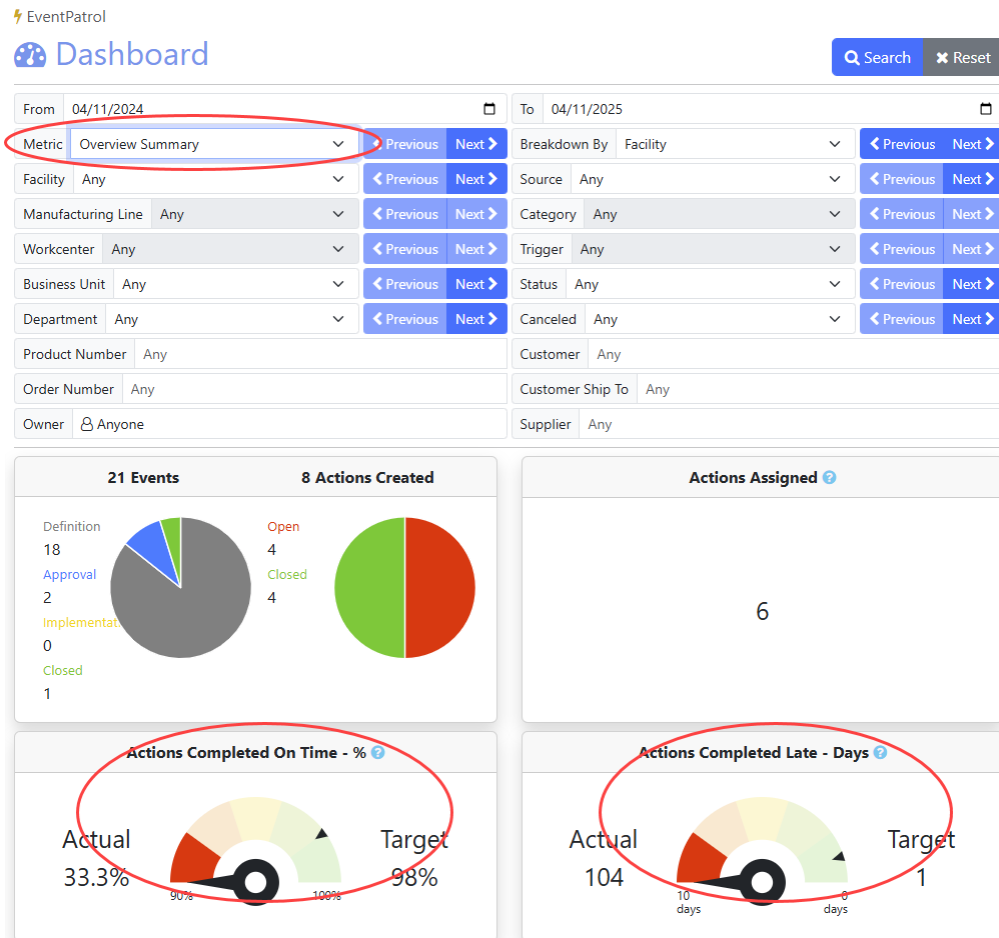
EventPatrol		
No	Add Action	Allows users to re-open a closed action task, to add new actions, and to close an action task.
No	Admin	Allows users to edit the configuration settings and all events, including changing the event owner
No	Create	Allows users to create events that originate from EventPatrol.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

NEW Dashboard Metrics & Filtering

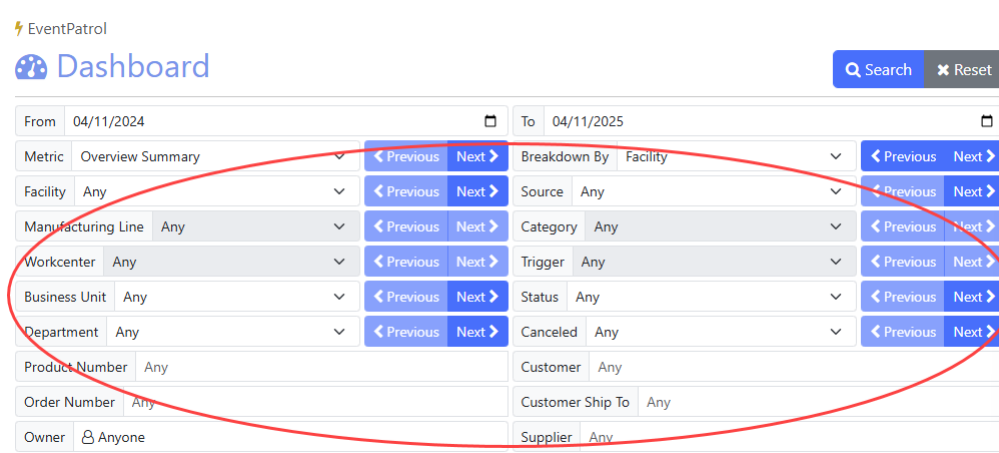
108. From the PatrolSuite homepage, click the Dashboard hyperlink in the EventPatrol card.



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

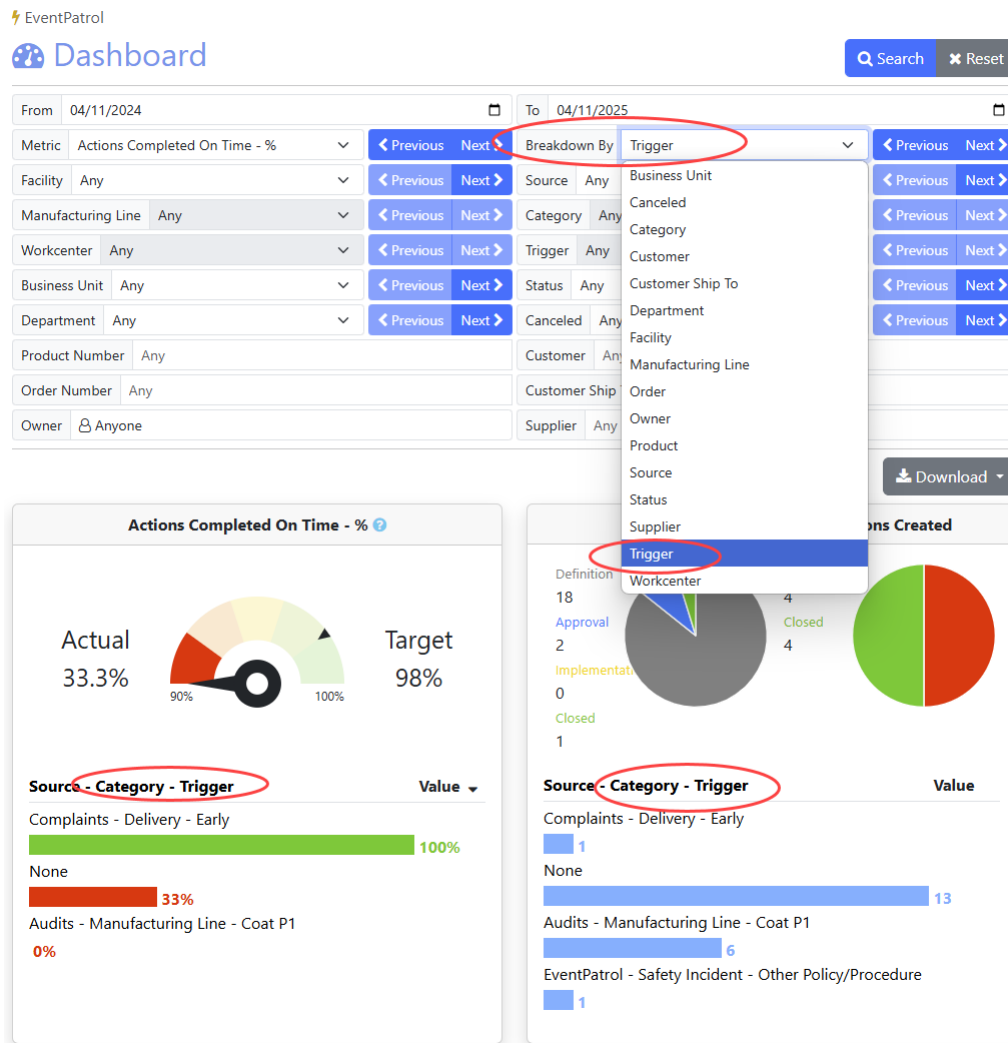


110. To filter the data, select the desired filters.





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



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

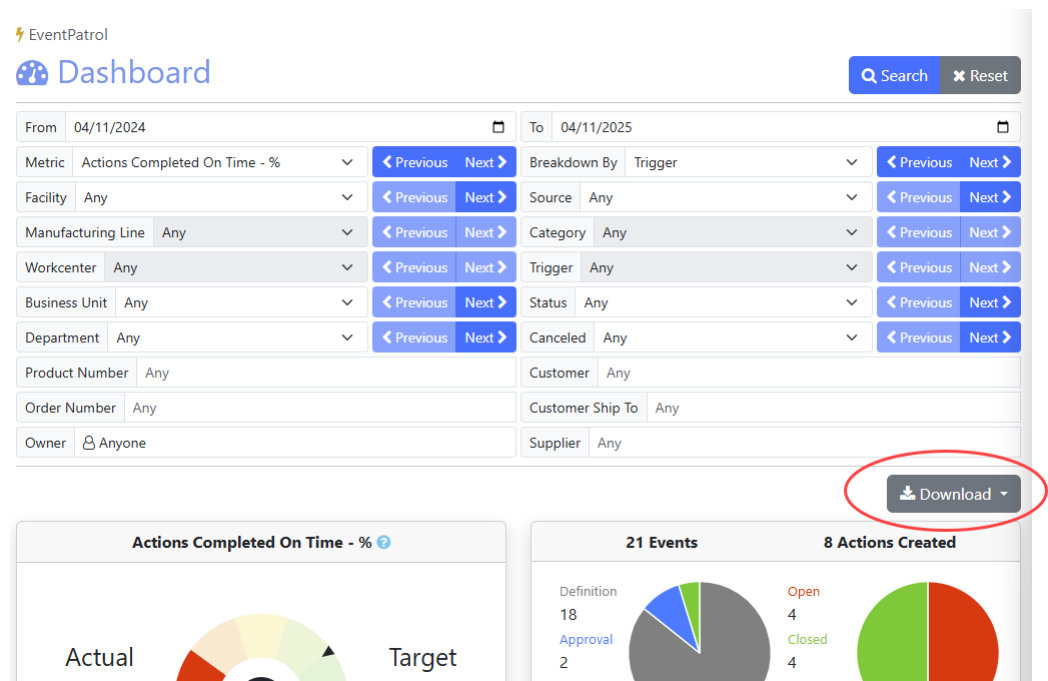




Exhibit A: Event Workflow

