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## 1 Auditor Details Modal Documentation

### 1.1 Overview

The Auditor Summary provides a detailed performance view of an individual auditor's productivity, accuracy, and quality metrics across all assigned audits. This summary is accessible by clicking on any auditor row from the "Auditor Performance & Productivity" tab in the audit dashboard.

### 1.2 How to Access

1. Navigate to the **Auditor Performance & Productivity** tab (3rd tab in the dashboard)
2. Locate the auditor in the productivity summary table
3. Click on any row in the auditor table to open the detailed summary modal

### 1.3 On-Screen Summary Components

#### 1.3.1 Header Section

**Auditor Information:** - **Auditor Name:** Display name of the auditor - **Auditor ID:** Unique identifier (e.g., A039) - **Download Report Button:** Dropdown menu with Excel and PDF export options - **Date Range Filters:** - "From" date picker (default: 1 year ago) - "To" date picker (default: today) - Date range cannot exceed 1 year - Validation prevents "From" date being after "To" date

### 1.3.2 Key Performance Metrics (Top Cards)

Three primary KPI cards displaying:

1. **Total Audits**
  - Count of audits the auditor participated in within the selected date range
  - Displayed with a gradient blue background
  - Icon: Clipboard list
2. **Total PIDs**
  - Aggregate count of Product IDs/Batch IDs assigned to the auditor
  - Formatted with Indian number notation (e.g., “36,389” or “1.5 L” for lakhs)
3. **Total SKUs**
  - Total Stock Keeping Units assigned to the auditor
  - Formatted with Indian number notation (e.g., “1.69 L” for 1.69 lakhs)

### 1.3.3 Deviation Summary Section

Displays aggregated deviation metrics across all audits performed by the auditor:

**Appeared Deviations (Blue Border)** - Quantity: Total count of items with appeared deviations found by this auditor - Value: Monetary value of appeared deviations ( )

**Matched Deviations (Green Border)** - Quantity: Items where auditor’s findings were confirmed as correct during re-audit - Value: Monetary value of matched deviations ( ) - **Higher is better** - indicates accurate auditing

**Revised Deviations (Yellow Border)** - Quantity: Items that required correction after auditor’s initial submission - Value: Monetary value of revised deviations ( ) - **Lower is better** - indicates better quality work

### 1.3.4 Audit History Table

Comprehensive table of all audits performed by the auditor, featuring:

**Columns:** - **Audit ID:** Unique audit identifier (clickable for drill-down) - **Store:** Store name where audit was conducted - **Date:** Audit start date (DD/MM/YYYY format) - **Job Type:** Type of audit (Full Audit, Select SKUs, Partial Audit) - **PIDs:** Number of product IDs assigned to this auditor in this audit - **SKUs:** Number of stock keeping units assigned - **QTY:** Quantity of items audited by this auditor - **Audited Value:** Total value audited by this auditor in Indian Rupees ( )

**Table Features:** - **Sorting:** Click column headers to sort (default: most recent first) - **Pagination:** Navigate through multiple pages of audit history - **Row Click:** Click any audit row to open detailed audit-specific summary - **Sticky Header:** Column headers remain visible while scrolling

## 1.4 Download Functionality

### 1.4.1 Accessing Downloads

Click the “**Download Report**” button in the modal header to reveal two export options:

### 1.4.2 Excel Export

**File Name Format:** Auditor\_{AuditorName}\_metrics.xlsx  
(e.g., Auditor\_Srikanth\_Rao\_metrics.xlsx)

**Sheet 1: Summary - Report Metadata:** - Auditor Name and ID - Generated On (timestamp) - Period (date range) - **Performance Metrics:** - Total Audits - Total PIDs - Total SKUs - **Status Breakdown:** - Completed count - In-Progress count - Pending count - Created count - **Deviation Summary** (with Qty and Value): - Appeared - Matched - Revised - In-Progress

**Sheet 2: Audit Details** - Complete list of all audits with: - Audit ID - Store Name - Date (DD/MM/YYYY)  
- Job Type - Allocated PIDs - Allocated SKUs - Quantity - Audited Value ( )

**Excel Features:** - Pre-formatted column widths for optimal readability - Separate sheets for summary and detail views - All numeric values properly formatted with thousand separators

### 1.4.3 PDF Export

**File Name Format:** Auditor\_{AuditorName}\_Report\_{Date}.pdf  
(e.g., Auditor\_Srikanth\_Rao\_Report\_2025-12-18.pdf)

#### Document Structure:

##### 1. Header Section:

- Report title: “Auditor Performance Report”
- Generated timestamp
- Auditor name and ID
- Period covered

##### 2. Performance Metrics Table:

- Total Audits
- Total PIDs (with comma separators)
- Total SKUs (with comma separators)
- Completed Audits count
- In-Progress Audits count
- Striped theme with blue headers

##### 3. Deviation Summary Table:

- Three rows: Appeared, Matched, Revised
- Columns: Deviation Stage, Qty, Value (Rs.)
- All values formatted with Indian number notation
- Grid theme with orange headers

##### 4. Audit Details Table:

- All audits performed by the auditor
- 8 columns: Audit ID, Store, Date, Job Type, PIDs, SKUs, Qty, Audited Value
- Plain theme with smaller font (8pt) to fit more data
- Dark gray headers with white text

**PDF Features:** - Professional formatting with color-coded tables - Automatic page breaks for long audit lists - Consistent Indian currency formatting throughout

## 1.5 Performance Indicators

### 1.5.1 Key Metrics Explained

**Average Time per PID (Product ID)** - Measures efficiency: How long it takes to audit each product batch - **Lower is better** - indicates faster processing - Benchmark: <10 minutes is good performance

**Average Time per SKU (Stock Keeping Unit)** - Measures item-level efficiency - **Lower is better** - indicates faster item processing - Benchmark: <5 minutes is good performance

**Match Rate** - Percentage of auditor’s findings that match during re-audit - **Higher is better** - indicates accuracy - Benchmark: 90.5% is acceptable, 91% is excellent

**Edit Rate** - Percentage of entries that required correction - **Lower is better** - indicates higher quality work - Benchmark: 10% is good

## 1.6 Use Cases

### 1.6.1 When to View Auditor Summary

**Performance Reviews:** - Monthly or quarterly auditor evaluations - Identify top performers for recognition  
- Identify underperformers for coaching

**Workload Assessment:** - Check if auditor is over/under-utilized - Verify fair distribution of work - Plan resource allocation

**Quality Monitoring:** - Track match and edit rates over time - Identify patterns in deviation types - Assess training effectiveness

**Capacity Planning:** - Understand auditor throughput - Forecast completion times for new audits - Balance team workload

### 1.6.2 When to Download

**For HR/Management:** - Performance review documentation - Bonus/promotion decisions - Annual reviews

**For Training:** - Identify specific areas needing improvement - Create targeted training programs - Track improvement over time

**For Audit Planning:** - Historical performance data for resource planning - Workload distribution analysis  
- Efficiency benchmarking

**For Compliance:** - Maintain audit trail documentation - Regulatory reporting - Quality assurance records

## 1.7 Data Interpretation

### 1.7.1 Understanding Deviation Patterns

**High Appeared, High Matched:** Auditor is finding legitimate issues - good performance

**High Appeared, Low Matched:** Auditor may be over-reporting issues - needs training

**Low Appeared, High Matched:** Auditor is accurate but may be missing some issues - needs attention

**Low Appeared, Low Matched:** May indicate either very clean stores or under-reporting - investigate

### 1.7.2 Status Indicators

- **Completed:** Audits fully finalized and approved
- **In-Progress:** Currently working on these audits
- **Pending:** Work done, awaiting supervisor review
- **Created:** Assigned but not yet started

## 1.8 Technical Notes

### 1.8.1 Date Filtering Behavior

- **Default Range:** Last 1 year from current date
- **Maximum Range:** 1 year (365 days)
- **Validation:**
  - Warning displayed if invalid range selected
  - “From Date cannot be after To Date”
  - “Interval can’t be more than 1 year”
- **Auto-Revert:** Returns to last valid range after 2 seconds
- **Time Handling:**
  - “From” date: Set to 00:00:00

– “To” date: Set to 23:59:59

### 1.8.2 Data Aggregation

- **Unique Audits:** Counted by distinct audit participation records
- **Sums:** All PIDs, SKUs, quantities, and values are summed across selected date range
- **Averages:** Time metrics are calculated from underlying time tracking data

### 1.8.3 Sorting Options

Default sort in audit history table: - **Primary:** By Audit Start Date (most recent first) - **Alternative:** Click any column header to sort by that column - **Toggle:** Click again to reverse sort direction

## 1.9 Best Practices

### 1.9.1 For Audit Managers

1. **Regular Monitoring:** Review auditor summaries weekly to catch issues early
2. **Comparative Analysis:** Compare multiple auditors to identify best practices
3. **Training Focus:** Use match and edit rates to target training efforts
4. **Recognition:** Download and archive reports for top performers
5. **Fair Assignment:** Use productivity metrics to balance workload

### 1.9.2 For Supervisors

1. **Performance Coaching:** Use metrics to provide specific, data-driven feedback
2. **Quality Checks:** Monitor match rates closely for accuracy issues
3. **Efficiency Goals:** Set realistic time targets based on historical data
4. **Early Intervention:** Address declining performance trends quickly

### 1.9.3 For Auditors (Self-Review)

1. **Track Progress:** Compare your current metrics to previous periods
2. **Quality Focus:** Prioritize accuracy (match rate) over speed
3. **Continuous Improvement:** Identify your weakest areas and improve
4. **Time Management:** Monitor your average time metrics to optimize workflow

## 1.10 Common Questions

**Q: Why doesn't my download include all audits from the table?**

A: The download respects the date filter applied. Adjust the date range to include more audits.

**Q: What does “Audited Value” represent?**

A: The total monetary value of inventory items you audited (based on item prices  $\times$  quantities).

**Q: How is “Match Rate” calculated?**

A:  $(\text{Number of your entries that matched during re-audit}) \div (\text{Total entries re-audited}) \times 100$

**Q: Can I see PID-level details?**

A: Yes, this information is available in the main Auditor Performance tab table (not in this summary modal).

## 1.11 Related Documentation

- See **supervisor-modal.md** for supervisor oversight metrics
- See **audit-modal.md** for individual audit breakdowns
- See **store-modal.md** for store-level details
- See **USER\_GUIDE.md** (Tab 3 section) for complete auditor performance workflows