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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 × quantities).

Q: How is “Match Rate” calculated?

A: (Number of your entries that matched during re-audit) ÷ (Total entries re-audited) × 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