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1 Supervisor Details Modal Documentation

1.1 Overview

The Supervisor Summary provides a comprehensive view of a supervisor's audit oversight activities, performance metrics, and workload. This summary is accessible by clicking on any supervisor card from the "Supervisor Approvals & Workload" tab in the audit dashboard.

1.2 How to Access

1. Navigate to the **Supervisor Approvals & Workload** tab (4th tab in the dashboard)
2. Locate the supervisor card you want to review
3. Click on the supervisor card to open the detailed summary modal

1.3 On-Screen Summary Components

1.3.1 Header Section

Supervisor Information: - **Supervisor Name:** Display name of the supervisor - **Supervisor ID:** Unique identifier (e.g., SUP001) - **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)

Four primary KPI cards displaying:

1. **Total Audits**
 - Count of unique audits supervised within the selected date range
 - Displayed with a gradient blue background
 - Icon: Clipboard list
2. **Days Supervised**
 - Number of distinct days the supervisor was actively overseeing audits
 - Calculated from day-wise summary data
3. **Total PIDs**
 - Aggregate count of Product IDs/Batch IDs across all supervised audits
 - Formatted with Indian number notation (e.g., “1.5 L” for lakhs, “2.3 Cr” for crores)
4. **Total SKUs**
 - Total Stock Keeping Units supervised
 - Formatted with Indian number notation

1.3.3 Deviation Summary Section

Displays aggregated deviation metrics across all supervised audits:

Appeared Deviations (Blue Border) - Quantity: Total count of items with appeared deviations - Value: Monetary value of appeared deviations ()

Matched Deviations (Green Border) - Quantity: Items where initial deviation was confirmed as correct - Value: Monetary value of matched deviations ()

Revised Deviations (Yellow Border) - Quantity: Items that required correction by supervisor - Value: Monetary value of revised deviations ()

1.3.4 Audit History Table

Comprehensive table of all audits supervised, 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 in the audit - **SKUs:** Number of stock keeping units - **QTY:** Quantity of items audited - **Value:** Total audited value in Indian Rupees ()

Table Features: - **Sorting:** Click column headers to sort ascending/descending - **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: Supervisor_{SupervisorID}_Report.xlsx

Sheet 1: Supervisor Summary - Supervisor Name and ID - Date Range applied - Metrics Summary: - Total Audits - Days Supervised - Total PIDs - Total SKUs - Status Breakdown (Completed, In-Progress, Pending/Created counts) - Deviation Summary with Qty and Value for: - Appeared - Matched - Revised

Sheet 2: Audit History - Complete list of all supervised audits with: - Audit ID - Store Name - Date - Job Type - PIDs - SKUs - Quantity - Value (Rs.)

Excel Features: - Pre-formatted column widths for optimal readability - Separate sheets for easy navigation - All numeric values properly formatted

1.4.3 PDF Export

File Name Format: Supervisor_{SupervisorID}_Report.pdf

Document Structure: 1. **Header Section:** - Report title with supervisor name - Supervisor ID - Date range

2. **Metrics Summary Table:**

- Total Audits
- Days Supervised
- Total PIDs
- Total SKUs
- Completed count
- In-Progress count

3. **Deviation Summary Table:**

- Appeared, Matched, and Revised deviations
- Both Qty and Value columns
- Grid theme with color-coded headers

4. **Audit History Table:**

- All supervised audits
- 8 columns: Audit ID, Store, Date, Type, PIDs, SKUs, Qty, Value
- Striped rows for readability

1.5 Use Cases

1.5.1 When to View Supervisor Summary

Daily Monitoring: - Check supervisor workload and active audits - Identify pending approvals

Performance Review: - Evaluate supervisor efficiency over time periods - Compare multiple supervisors' metrics

Resource Planning: - Assess supervisor capacity - Balance workload distribution

Compliance Tracking: - Verify audit coverage - Track deviation patterns

1.5.2 When to Download

For Sharing: - Send reports to management - Share with finance team for high-value deviations

For Record-Keeping: - Archive monthly supervisor performance - Maintain compliance documentation

For Analysis: - Import into BI tools for deeper analysis - Create custom charts and visualizations

1.6 Data Interpretation

1.6.1 Understanding Deviation Metrics

Appeared Deviations: Initial discrepancies identified during audit. Higher values indicate significant inventory discrepancies that require attention.

Matched Deviations: Deviations that were verified and found to be correct. High match rates indicate accurate initial audits.

Revised Deviations: Items that required supervisor intervention and correction. Lower values indicate better auditor accuracy.

1.6.2 Status Indicators

- **Completed:** Audits fully finalized
- **In-Progress:** Currently active audits

- **Pending:** Awaiting action or approval
- **Created:** Set up but not yet started

1.7 Technical Notes

1.7.1 Date Filtering Behavior

- **Default Range:** Last 1 year from current date
- **Maximum Range:** 1 year (365 days)
- **Validation:** Automatic warning if invalid range selected
- **Auto-Revert:** Returns to last valid range after 2 seconds if invalid selection
- **Time Handling:**
 - “From” date: Set to 00:00:00 (start of day)
 - “To” date: Set to 23:59:59 (end of day)

1.7.2 Data Aggregation

- **Unique Audits:** Counted by distinct AUDIT_ID
- **Sums:** PIDs, SKUs, quantities, and values are aggregated across all matching records
- **Dates:** Day-wise summaries are used to calculate “Days Supervised”

1.7.3 Performance Considerations

- **Large Datasets:** Table pagination helps manage performance
- **Date Filtering:** Apply narrower date ranges for faster loading
- **Export Size:** Excel exports include full dataset (may be large for long time periods)

1.8 Best Practices

1.8.1 For Audit Managers

1. **Regular Reviews:** Check supervisor summaries weekly to identify trends
2. **Balanced Workload:** Use metrics to ensure even distribution of audits
3. **Training Needs:** High revision rates may indicate need for auditor training
4. **Timely Approvals:** Monitor pending/in-progress counts to prevent bottlenecks

1.8.2 For Supervisors

1. **Self-Monitoring:** Review your own summary to track personal performance
2. **Prioritization:** Focus on high-value deviations first
3. **Documentation:** Download reports regularly for personal records
4. **Trend Analysis:** Compare month-over-month metrics to improve efficiency

1.9 Related Documentation

- See **audit-modal.md** for detailed audit breakdowns
- See **auditor-modal.md** for auditor performance metrics
- See **USER_GUIDE.md** (Tab 4 section) for complete supervisor approval workflows