Supervisor Details Modal Documentation

Table of Contents

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.

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

On-Screen Summary Components

Header Section

Supervisor Information: - **Supervisor Name**: Display name of the supervisor (e.g., "Aditya Reddy") - **Supervisor ID**: Unique identifier (e.g., "S001") - **Download Report Button**: Dropdown menu with Excel and PDF export options - **Date Range Filters**: - "From" date picker (default: 1 year ago, e.g., 2024-12-19) - "To" date picker (default: today, e.g., 2025-12-19) - Date range cannot exceed 1 year - Validation prevents "From" date being after "To" date

Key Performance Metrics (Top Cards)

Six primary KPI cards displaying:

1. **Total Audits**
   - Count: 15 (unique audits supervised within the selected date range)
   - Displayed with a gradient blue background
   - Icon: Clipboard list
2. **Auditors Supervised**
   - Count: 27 (number of auditors overseen)
   - Shows supervisor's team size
3. **Days Supervised**
   - Count: 60 (distinct days actively overseeing audits)
   - Calculated from day-wise summary data
4. **Total PIDs**
   - Count: 70,251 (Product IDs/Batch IDs across all supervised audits)
   - Formatted with comma separators
5. **Total SKUs**
   - Count: 3.40 L (Stock Keeping Units supervised)
   - Formatted with Indian number notation (Lakhs)
6. **Total Value**
   - Value: 44.50 Cr (Total audited value in Indian Rupees)
   - Formatted with Indian number notation (Crores)

Deviation Summary Section

Displays aggregated deviation metrics across all supervised audits:

Appeared Deviations (Blue Border) - SKUs: 32,149 - Qty: 5.73 L - Value: 2.13 Cr - Total count of items with appeared deviations

Matched Deviations (Green Border) - SKUs: 29,953 - Qty: 5.34 L - Value: 1.98 Cr - Items where initial deviation was confirmed as correct

Revised Deviations (Yellow Border) - SKUs: 2,196 - Qty: 38,456 - Value: 14.90 L - Items that required correction by supervisor

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

Download Functionality

Accessing Downloads

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

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

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

Use Cases

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

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

Data Interpretation

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.

Status Indicators

- **Completed**: Audits fully finalized
- **In-Progress**: Currently active audits
- **Pending**: Awaiting action or approval
- **Created**: Set up but not yet started

Technical Notes

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)

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"

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)

Best Practices

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

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

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