Store Check

User Guide v0.1

Last Revision: Jan 15, 2014
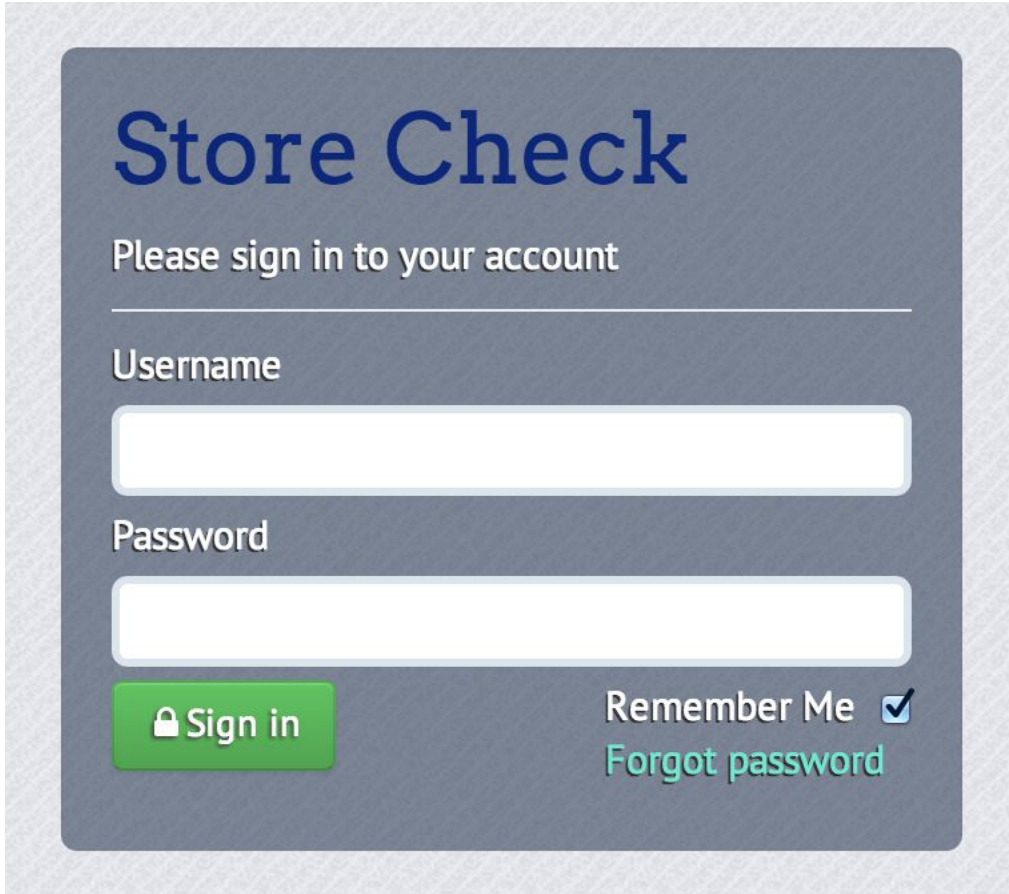
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Access

The Store Check website can currently be found at http://54.235.222.200/.

A username and password is required for entry. The site has a fairly typical login interface:
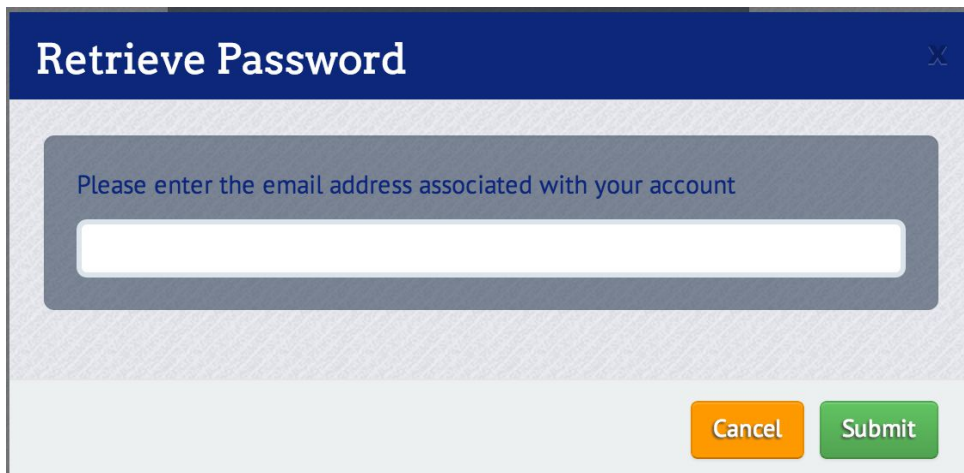
The site also offers forgotten password retrieval, which is accessible directly on the login screen by clicking the "Forgot password" link:
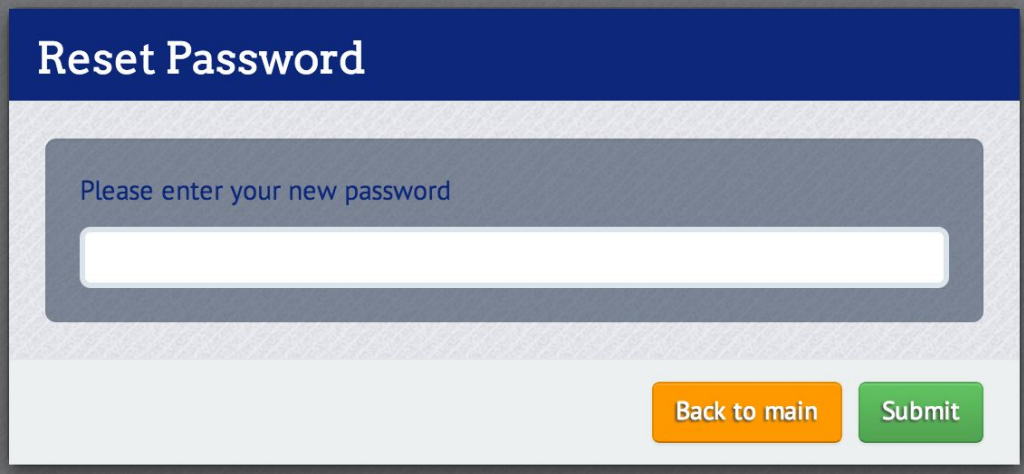
You should receive an email in the inbox of the specified email address. If it does not appear, check for it in the spam folder. It should be from storecheck.users@gmail.com. Click the link in the email to return to the Store Check application. You will be presented with a dialog that enables you to select a new password:

Reset Password

Please enter your new password

Back to main   Submit

Auditor

Nav-Bar

At the top of each auditor page, there is a navbar to allow for easy navigation.

Clicking on the icon that looks like a person (or on the auditor name and organization that is next to it) will go to the edit user page. Each other page will be discussed in detail in the following sections.

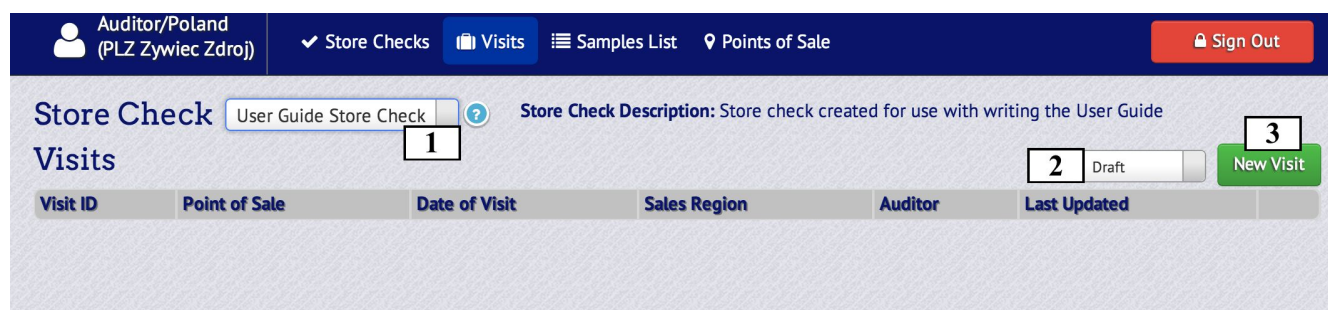## Visits View (Landing Page)

The landing page for auditors is the Visits view.

Store Checks are not to be created by the auditor. Rather, they are to be set up in advance by another type of user. Select the store check to which a visit will be made from the list box marked "1" in the above picture. It will populate the Visits table with all of the appropriate visits for the selected Store Check.

The visits will be those that belong to the selected Store Check, but also pass the filter provided by the listbox marked "2" in the above picture. This mechanism is designed to keep only active or soon-to-be-active Store Checks in the list. The list can be sorted by clicking on the table headers for the field by which the data is to be sorted. Sorting can be done on multiple columns by holding the shift key and clicking additional table headers. All tables on the site will behave this way.

To add a visit to the selected Store Check, press the "New Visit" button marked above as "3."

New Visit

The New Visit page allows the auditor to enter basic information about the visit.

The Date of Visit is entered in the field marked "1" in the above image. Clicking on the calendar or the text-area of the box will present a graphical date picker.

Clicking on the header of any date picker on the Store Check site will let you more quickly select a date that is further away from the current date. For example, if you are viewing a month on the date picker, clicking the header (which says something like "January 2014" as it appears in the above picture) will let you choose which month of 2014 you would like. Selecting the header while in the year view will let you choose which year you wish to select.

The Auditor Name field (marked above as "2") is free-text entry, with no restrictions.

The Point of Sale selection (marked above as "3") is a searchable list box that will allow you to select a point of sale. The search begins after at least 2 of the letters from the name of the point of sale are entered.

Optionally, a new Point of Sale can be created (with the button marked above as "4").

When all fields are entered, the new visit will be created after selecting the button marked above as "5"). After created, auditors will be redirected to the Edit Visit view.

Edit Visit

The Edit Visit page allows the auditor to easily add samples for a given product, as well as change any relevant details about the visit. To add a sample, click the green "+" symbol next to the relevant product.

Clicking on the blue icons on the right-hand side of each product entry will take you to lists or grids that show only the samples for that product. The symbol on the left will go to the list page, and the symbol on the right will go to the grid page.

This page also provides a quick way to submit all of the samples associated with this visit.

Sample Grid

The sample grid page provides a way to enter audit results for multiple samples at a time.

On the left side of the page is a hierarchy that allows for easy navigation across all result categories. The button indicated above as "1" will expand all categories, while the button indicated as "2" will collapse all categories. The button marked "3" will collapse any categories that aren't marked as "alert." Finally, the button marked "4" will collapse any categories that aren't marked as "defect."

At the top-right of the page (marked "5") is a control that allows for cycling through the questions in the order they appear in the audit grid. The green buttons marked "Prev" and "Next" will allow cycling through items. The "Save & Stay" button will cause the samples to be saved, but will reload the page and come back to the current item on the audit grid. Changes are not saved on this page unless one of these three buttons is pressed. If the visit is clicked, it will show the visit for the given samples. If the product link is clicked, it will show all samples for the specified product for this visit. In the event the samples do not share a visit, these links will not be visible. The label marked as "6" shows the current item number and the total number of items in the audit grid, separated by a slash.

For each sample, there are some controls to specify details of the current audit grid item. The button marked "7" will allow the sample's note to be modified. The button marked "8" will allow a picture to be uploaded for the current item of the specified sample. If an image is currently uploaded, button "9" will be visible, and will allow the image to be deleted. The button specified by "10" will cause the description of the current item for the specified sample to be copied to the other visible samples.

Sample List

View Samples ⓘ   `Import Samples`

	Visit Date ▲	Store Check	ID	POS	Product	Auditor	Best Before	Batch	Factory	Images	Defects	Note	Status	
		▲▼			▲▼					▲▼	▲▼		▲▼	
☐	15-Jan-2014	User Guide Store Check	1	Carrefour Bydgoszcz	Dobrowianka Still 1,5L	Your Name Here				no	1❌		submitted	✏️
☐	15-Jan-2014	User Guide Store Check	2	Carrefour Bydgoszcz	Dobrowianka Still 1,5L	Your Name Here				no			draft	✏️

|◀ ◀◀   1 to 2 of 2 rows   ▶| ▶| 15 ▼ per page

The sample list provides a way to view the relevant samples that are visible to the auditor's current audit team(s). Most columns provide a widget beneath their headers that allow users to filter the value represented by that column.

When samples are selected, buttons will appear that represent actions that can be taken on the set of samples that are selected.

`Import Samples`   `Submit Selected`   `Mark Selected As Draft`   `View Selected On Grid`   `Export Selected`   `Delete Selected`

The "export selected" button will export the selected buttons into an editable xlsx file. The "import samples" button will request an xlsx file in the format that is exported by the "export selected" button. In the exported file, only the first worksheet in the file is to be edited.

The "submit selected" button will submit the samples that are selected for supervisor review. Submitted samples will not be editable unless the supervisor marks them as "to-be-corrected," or the "mark selected as draft" button is pressed by the auditor. Only samples marked "submitted" may be marked as drafts.

The "view selected on grid" button will simply redirect the user to the sample grid page, which will show only the selected items.

Finally, the "delete selected" button will delete any of the selected samples, and remove them from the visits to which they were applied.

Clicking on the visit date, or the pencil icon on the right-hand side of each row, will redirect the user to the edit sample page for the selected sample.

Edit Sample

The edit sample page provides a method of entering extra details about a sample, as well as entering some observations. In the area marked above as "1," the user can enter various fields attached to the sample.
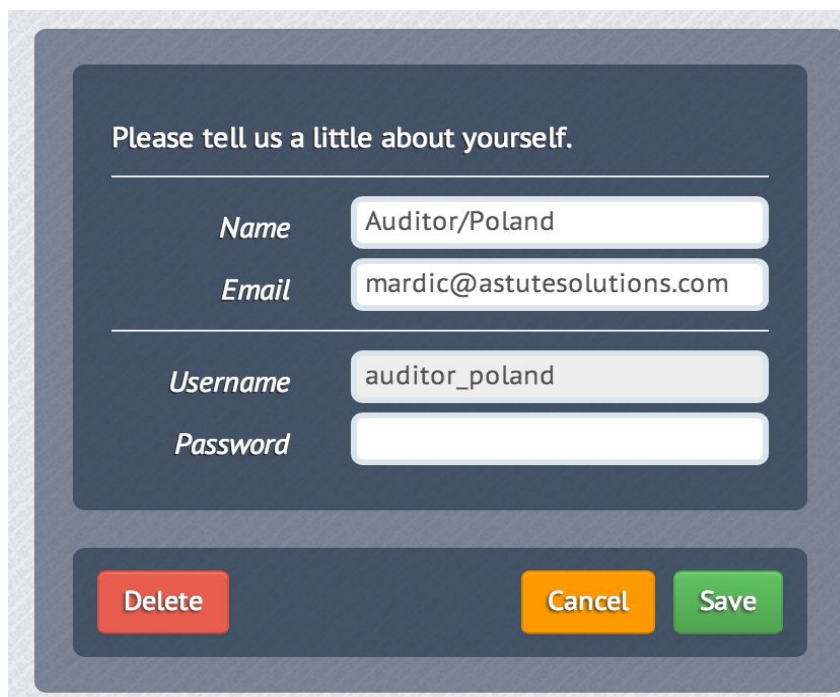
At the bottom of section "1" is a sub-section marked "samples," which represents the samples that are also associated with the same visit. The button marked "list" will redirect to the samples list view, with these samples in the list. The "grid" button will redirect to the samples grid view, with these samples in the list. The "add" button will add another sample, and copy the attributes of the current sample. It will attempt to increment the sample number (if the default naming scheme for samples is used), then redirect to view the newly-created sample. This is particularly useful for assessing products with similar attributes.

In the section marked "5," a hierarchical view of observation types is presented for easy navigation. Section "6" will be a series of sample observations that can be set, as they were on the sample grid (except the observations will be those of a single sample). Section "7" represents the image controls that were also available on the sample grid.

The button marked "8" will allow the user to submit the current sample for supervisor review, while the button marked "9" will delete the sample and disassociate it from the visit.

The buttons in the section marked "10" will save the changes made on this screen, or cancel them. It should be noted that clicking buttons 2-4 should also cause the sample to save before redirecting. Unlike the sample grid, answers to the observations on the edit sample page will not be saved until the "save" button (in section "10") is pressed, or buttons 2-4 are pressed.

Edit User Account

From the edit user account page, you can delete your account, or change your name, email, or password.

Points of Sale

Points of Sale

Customer	Company	Address	City	Admin Area	Distribution Channel	
						+ Add New
PLZ Auchan	Auchan		Warsaw		Modern Trade	🔍
PLZ Auchan	Auchan Poznan	uL Glogowska 432	Poznan		Modern Trade	🔍
PLZ Auchan	Auchan Szczecin	Ustowo 45	Szczecin		Modern Trade	🔍
PLZ Carrefour	Carrefour Szczecin	uL Mieszka I 73	Szczecin		Modern Trade	🔍
PLZ Carrefour	Carrefour Bydgoszcz	uL Skarzynskiego 2	Bydgoszcz		Modern Trade	🔍
PLZ Carrefour	Carrefour Katowice	AL Rozdzienskiego 200	Katowice		Modern Trade	🔍
PLZ Carrefour	Carrefour Warszawa	Targówek	Warszawa		Modern Trade	🔍
PLZ Carrefour	Carrefour Wroclaw	uL Graniczna 2A	Wroclaw		Modern Trade	🔍
PLZ Modern Trade	Alimentacion Y Bazar C/ Monasterio Del E				Modern Trade	🔍
PLZ Real	Real Wroclaw	uL Boleslawa Krzywoustego 126	Wroclaw		Modern Trade	🔍
PLZ Real	Real Bydgoszcz	uL Kruszwicka 1	Bydgoszcz		Modern Trade	🔍
PLZ Real	Real Rzeszow	al. Wincentego Witosa 21	Rzeszow		Modern Trade	🔍
PLZ Real	Real Warszawa	Ursynów,uL Pulawska 427	Warszawa		Modern Trade	🔍
PLZ Tesco	Tesco Bydgoszcz	uL Torunska 101	Bydgoszcz		Modern Trade	🔍
PLZ Tesco	Tesco Katowice	uL Chorzowska 107	Katowice		Modern Trade	🔍

|◀ ◀ 1 to 15 of 18 rows ▶▶ ▶▶| 15 ⇕ per page

The Points of Sale page is accessible from the nav-bar. It shows the points of sale that are available for visits. A new point of sale can be added by clicking the "Add New" button at the top-right of the page.

Store Checks

Store Checks   [Active]

Name	Report Date	Assigned	Type	
2013-01-13-A	13-Jan-2014	✔	external	🔍
2013-01-15	15-Jan-2014	✔	external	🔍
2013-Dec-11	20-Dec-2013	✔	external	🔍
2013-Dec-16	16-Dec-2013	✔	internal	🔍
Blank Storecheck		✔	external	🔍
Date test	31-Dec-2013	✔	external	🔍
New SC RT	11-Dec-2013	✔	external	🔍
New SC RT2		✔	external	🔍
New SC_MD	19-Dec-2013	✔	external	🔍
PLZ SC1	30-Nov-2013	✔	internal	🔍
RT MARK 4		✔	external	🔍
RT MARK 5		✔	external	🔍
RT MARK Dec 30	30-Dec-2013	✔	external	🔍
TEST SC SAT	12-Jan-2014	✔	external	🔍
User Guide Store Check	31-Jan-2014	✔	external	🔍

The Store Checks page can also be accessed from the nav-bar. It shows the store checks that are associated with the auditor's team(s). The listbox at the upper-right of the page can filter closed

or active store checks from the list.