



Store Audit Center Frequently Asked Questions

<http://assess.countertools.org>

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ACCESS

How do I access the Store Audit Center (SAC)?

If you're a team member, look for the link in your invitation email that says "To perform your audit online, you may do so here". If you're a coordinator, navigate to <http://assess.countertools.org/>.

Do my team members need a login and password to access the Store Audit Center and do assessments?

No, only the coordinator has a login and password to access the Store Audit Center. A team member receives invitations to assess one or more stores via their email.

How do I get a username and password?

Contact your Project Director at Counter Tools. And if you're unsure of who your Project Director is, contact help@countertools.org



SET-UP

Can I have only one team?

Yes, each coordinator has one team. Within the team, you can have as many team members as you would like.

Can I have more than one module in an audit form?

Yes, you may have multiple modules. A module is a group of questions, and you will see modules that pertain to your project in your drop down list on the **Audit Forms** tab.

How can I send instructions to my data collectors?

When you create a campaign, there is a text box for instructions that you can fill in. If you've already created your campaign, you can use the **Edit** link from the **Campaigns** page to re-open the text box for editing. These instructions will appear in the email invitations to your team members.

What is a campaign?

A campaign is like a bucket for your data. You may have one or several campaigns. To make a campaign, you choose a specific audit form, some or all of your team members, and some or all of your stores. Once you've chosen who is involved, you will assign team members to assess specific stores.

What is the difference between an audit form and a campaign?

An audit form is part of a campaign. An audit form is the set of questions that team members complete for each store. A campaign contains all the team members assigned to particular stores with a particular audit form.

How can I print my audit form?

If you're a team member, there's a link to a printable form in the invitation email you received. If you're a coordinator, you can use the **Print (PDF)** link on either the **Audit Forms** page or the **Campaigns** page to access a printable form.

How do I make store assignments?

From the **Campaigns** page, click on the name of the campaign in which you want to make assignments. This will take you to a page where you can select team members and stores. Don't forget to click the button that says **Make Assignments** after you've selected the team member and stores.



Can I assign multiple people to one store?

Yes. You can assign multiple people to one store and that's not a problem at all. The SAC will keep the data for both of the assessments associated with that store.

I created store assignments, but now how do I let my team members know that they can go collect data?

From the **Campaigns** page, click the **Invite** link to the right of the campaign name. This will take you to a page where you can send an invitation to an individual team member or to the whole campaign with instructions and store assignments.



CAMPAIGN MANAGEMENT

Some of my data collectors made mistakes on their audit forms. Can they go back and edit their submitted data?

No. Only coordinators can edit submitted data. If a team member makes a mistake on a form, they should make a note of it in the notes section of the form (if they get a chance) and/or email the coordinator to notify them of the question number and correct answer.

Will I receive an alert when one of my volunteers completes an assessment?

No, you won't receive an alert when an assessment has been submitted, but you can go to your **Campaigns** page within the Store Audit Center site and click **View Audits** to see how many audits have been submitted for a campaign. The total number of completed audits is also displayed in the **# Audits** column on the **Campaigns** page.

How do I view or edit a completed assessment?

If you are a team member, contact your coordinator/manager. If you are a coordinator (you have username and password for the Store Audit Center), you can edit an assessment by following these instructions: On the **Campaigns** page, click on the **View Audits** link to the right of your campaign. You will see a list of your completed audits. Use the links to the right of a particular audit to either edit or delete the submission.



STRATEGY

Can I have more than one module in an audit form?

Yes, you may have multiple modules. A module is a group of questions, and you will see modules that pertain to your project in your drop down list on the **Audit Forms** page.

Should my team members be able to add a store in the field?

The right answer depends on your situation. Please find sample situations below.

Yes - Adding stores in the field can provide the most up-to-date data set, accounting for stores that have closed, reopened, or moved. This option is best if you feel comfortable empowering your team members to make this additional decision in the field, or if your campaign is more open-ended in nature. If you are also using the Store Mapper, be sure to fill out the Retailer Update Form as well.

No - Adding stores in the field can complicate the data collection process for team members and coordinators. Making this decision before beginning the campaign creates clear assignments for all team members and a clear end-point for data collection. Usually, we (Counter Tools) will provide a list of stores that have been randomly selected in order to produce a representative sample. This sample list takes into account any changes in store openings/closings/relocations.

When/why would I make new/separate campaigns?

You might want a new/separate campaign if you are managing different geographic areas (like multiple counties); if you are using different audit forms; or if you are collecting data over multiple years.

Can I assign multiple people to one store?

Yes. You can assign multiple people to one store, and that's not a problem at all. The SAC will keep the data for both of the assessments associated with that store.

What's the difference between an active team member and an inactive team member?

An active team member is someone who is authorized to collect data. An inactive team member is someone who is not currently helping with data collection efforts. You might make a team member inactive if they are taking a leave of absence, for example. By setting a team member to inactive, they will not receive emails sent to all team members, and you will not be able to create store assignments for them.



DATA ANALYSIS

How do I download data from the SAC?

To download an Excel spreadsheet showing all audit data for a particular audit form, click the "Export" link to the right of your audit form, on the Audit Forms tab. This will show you data for each campaign that used that audit form.



ERRORS/TROUBLESHOOTING

My team members aren't receiving emails.

First, try changing the team member's associated email account to a personal email (if it was a state email). Next, the team member should check their spam folder to see if the email got caught there. Next, have the team member add your (the Coordinator) email to email contacts.

The store list from the Mapper won't upload to the SAC/I get errors when I upload my store list to the SAC.

The store list from the Mapper is in a different format than the one the SAC requires. Be sure to save the excel doc as .xls instead of .xlsx. To ensure that your store list is in the right format, click the batch upload stores button on the Stores tab, then download the excel template and paste your store list into that template.

There are duplicates of retailers listed in the Stores tab.

Sometimes this happens if you accidentally click on the upload link twice. If you haven't already started assessing retailers, delete all of your stores, and re-upload the excel document. Be patient, as sometimes it takes a couple of minutes to complete. Remember to avoid clicking the upload button twice, as this may cause the list to upload twice.

I uploaded my stores, the website "thought" for a while, and then it timed out. What now?

Batch upload sometimes takes a while and the connection can time out, making you think nothing happened, when your stores actually did upload! Check your store list to confirm. You may need to refresh the page.