



SmartAudit™ Insight Main Tabs

Content

DTIQ's customizable **SmartAudit™** consists of 10 questions that reveal how to improve your business operations. To use this feature, you must have an active 360iQ subscription. Contact **DTIQ Support** at support@dtiq.com or your **Customer Success Manager** at csr@dtiq.com to learn more.

Note: You can easily navigate throughout the audit by clicking on a specific question or incident.

In this guide, we will cover the following topics:

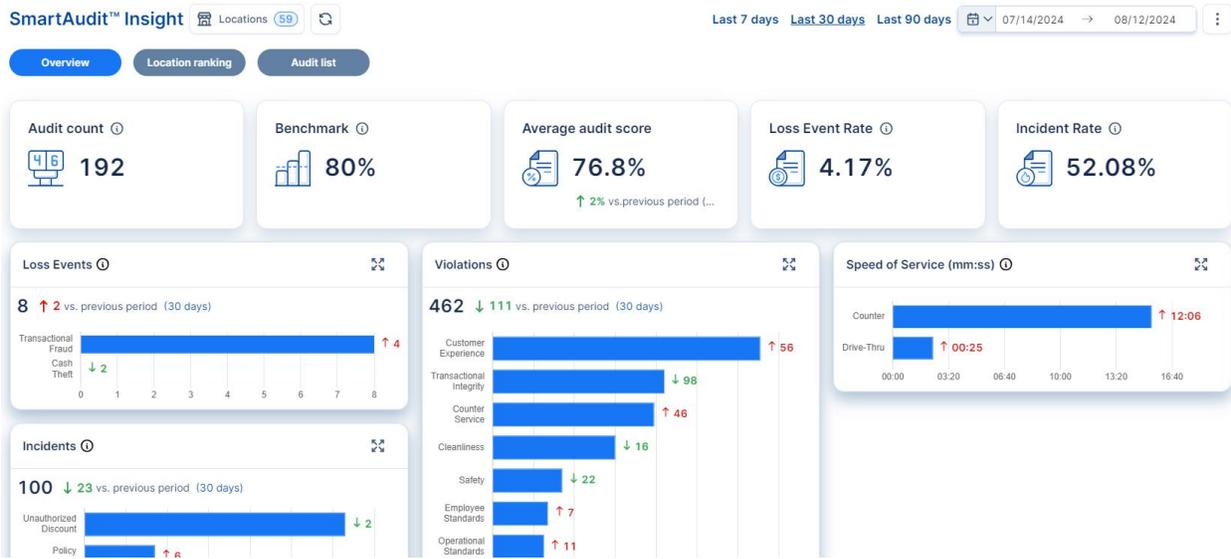
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To learn the basics of SmartAudit™ Insight, see our guide on the SmartAudit™ Insight Dashboard.

There are 3 main tabs for the **SmartAudit™ Insight** dashboard that you can select at the top of the dashboard: **Overview**, **Location ranking**, and **Audit list**.

1. Overview

The **Overview** provides insight into your overall audit question performance.



At the top of the **Overview** page, you can view the following information:

- **Audit count**—the total number of audits conducted in a given timeframe.
- **Benchmark**—percentage considered as a passing score.
- **Average Audit Score** for your locations and compare it to the previous period as well as your company benchmark (the default benchmark setting is 80% and can be changed by contacting your CSM).
- **Loss Event Rate**—any event where DTiQ has identified a potential financial loss.
- **Incident Rate**—any event where DTiQ has identified a coaching opportunity to improve performance.

Analyzing and reviewing this data helps you identify areas for improvement. For example, you can view the **Average audit score** for your locations and compare it to the previous period, as well as your company **Benchmark**.

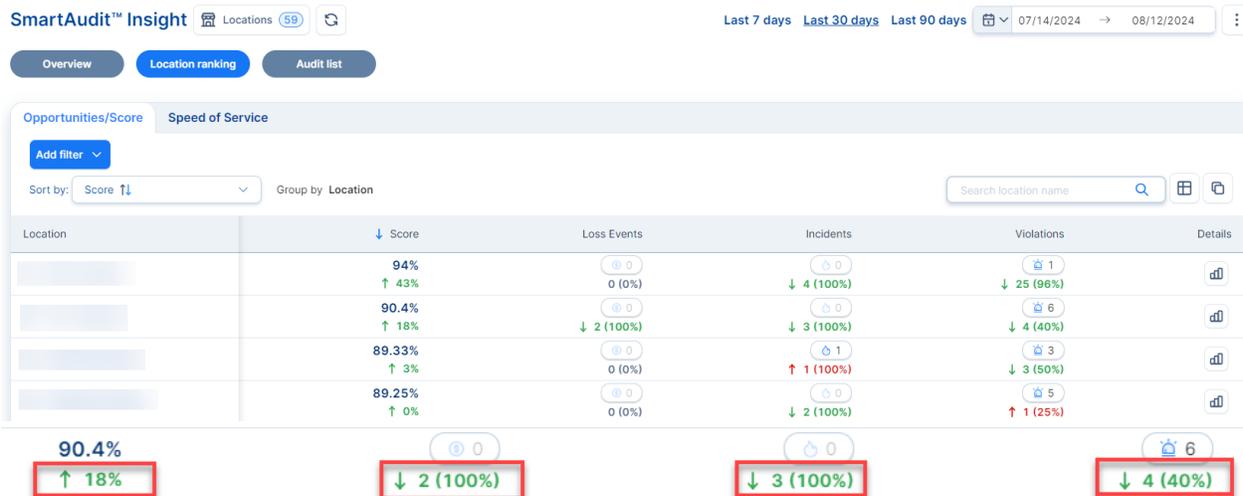
Note: The default benchmark setting is 80% and can be changed by contacting your [CSM](#).

Right below are charts of the number of times that **Loss Events**, **Violations**, and **Incidents** were found in a SmartAudit™ along with a graph of **Speed of Service** measurements. Click on a single bar in any of the charts to go to the **Location ranking** tab.

2. Location ranking

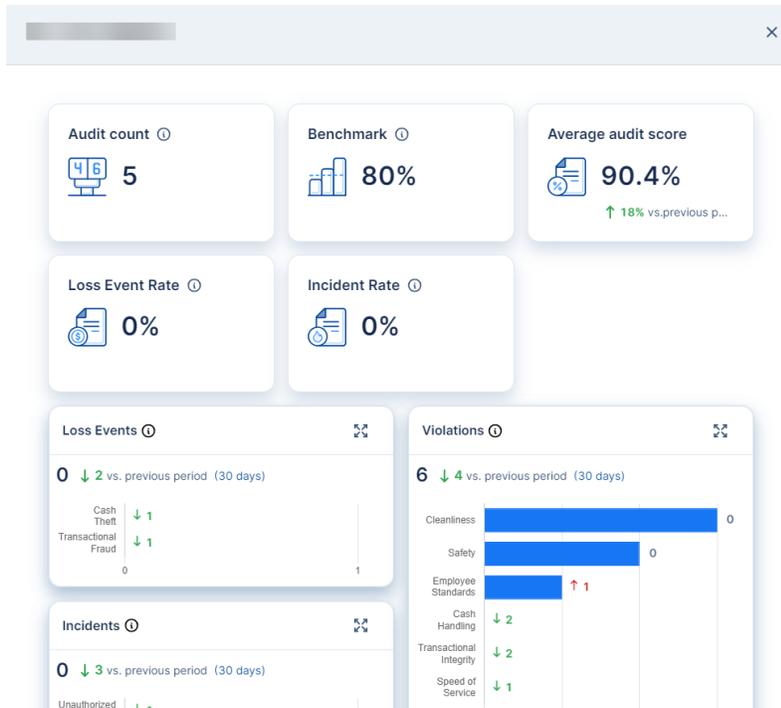
The **Location Ranking** is a list of locations that are sorted by SmartAudit™ scores by default.

The **Opportunities/Score** tab focuses on the SmartAudit™ **Score** and the counts for **Loss Events**, **Incidents**, and **Violations**. By clicking on a single row in the table, you can view the **Audit list** tab for more audit details for the chosen location.

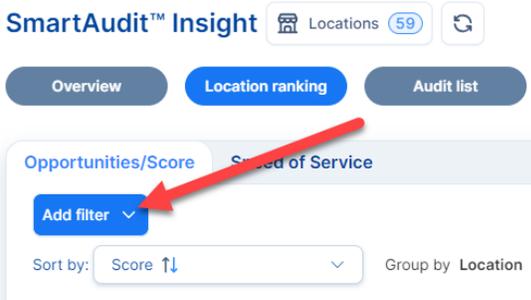


Here, you can also compare every metric with a previous period. By default, this period covers the **last 30 days**, but you can also adjust the time period in the top right to **last 7 days** or last **90 days**.

Click the chart  icon to see the details of a location's audit score and details regarding **Loss Events**, **Incidents**, and **Violations**.

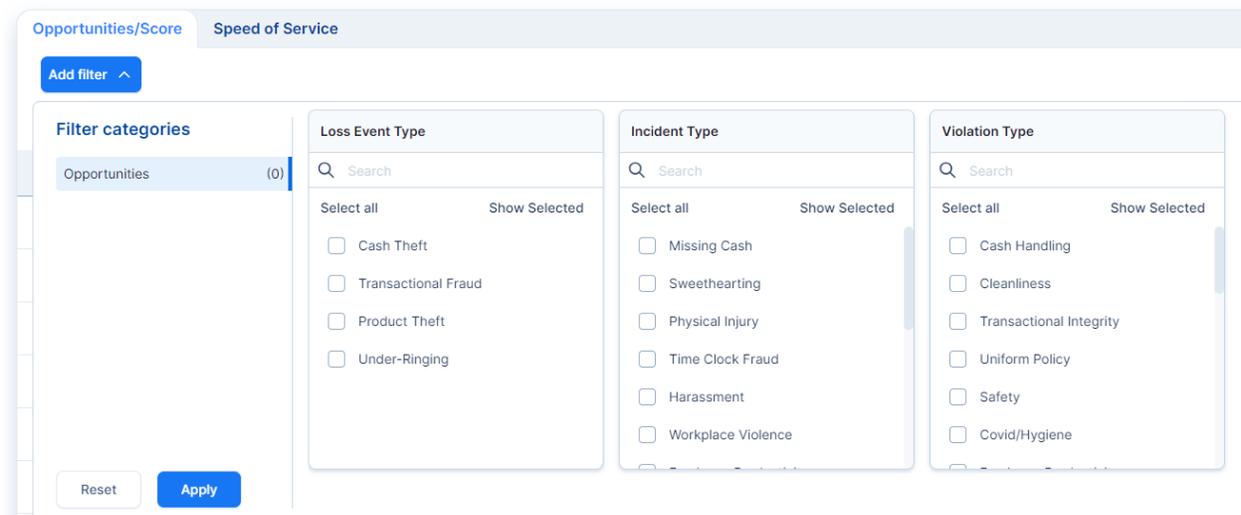


In the **Location** ranking tab, click the **Add filter** button to filter the table.

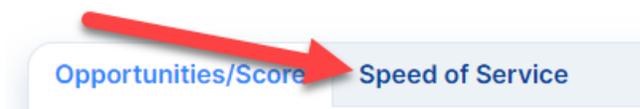


Select the items of interest from the **Loss Event Type**, **Incident Type**, and **Violation Type** menus. Click the **Apply** button to apply the selected filters. To close the panel without any changes, click the **Add filter** button again.

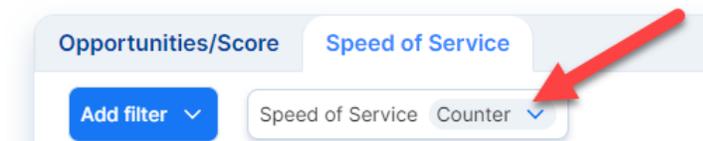
You can reset all filters by clicking the **Reset** button.



Click the **Speed of Service** tab to view information about the average and longest Speed of Service for a given location.



The Speed of Service type is set to **Counter** by default. You can change the type via the **drop-down menu**.



3. Audit List

The **Audit list** lets you explore the full list of audits performed for a given time range for all your locations, including information about the number of **Loss Events**, **Incidents**, and **Violations**, along with Speed of Service times and audit score.

Add filter

Sort by: Loss Events ↑

Search location name

Location	Audit Date	Created Date	Loss Events	Incidents	Violations	Speed of Service	Score	Actions
<input type="checkbox"/>	08/08/2024 01:29:52 PM	08/09/2024 10:20:11 AM	2	1	3	Drive-... 02:54	66%	Link Download Preview
<input type="checkbox"/>	08/03/2024 01:01:37 AM	08/09/2024 08:41:10 AM	1	1	2	Drive-... 03:57	72%	Link Download Preview
<input type="checkbox"/>	07/29/2024 05:15:33 PM	08/02/2024 11:14:46 AM	1	0	3	Counter 06:05	66%	Link Download Preview
<input type="checkbox"/>	07/28/2024 01:53:40 PM	08/02/2024 07:21:28 AM	1	0	2	Counter 02:43	78%	Link Download Preview
<input type="checkbox"/>	07/27/2024 09:00:48 PM	07/29/2024 06:07:29 AM	1	0	5	Counter 04:57	50%	Link Download Preview
<input type="checkbox"/>	07/21/2024 11:08:25 PM	07/24/2024 08:37:18 AM	1	0	4	Counter 05:44	53%	Link Download Preview
<input type="checkbox"/>	07/17/2024 12:43:08 AM	07/18/2024 11:34:03 AM	1	0	4	Counter 05:09	56%	Link Download Preview

To see more details, click the icons with counts.

Loss Events
Incidents
Violations
Speed of Service

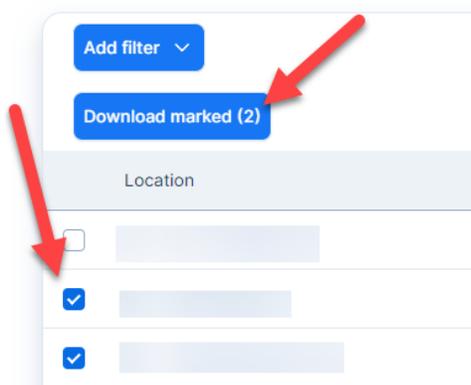
2
1
3
Drive-... 02:54

In the **Actions** column, you will see the following symbols:



1. **Link**—copy a link to the SmartAudit™ report.
2. **Download**—download a PDF version of the SmartAudit™ report.
3. **Preview**—view the SmartAudit™ report in your web browser.

To download multiple SmartAudit™ reports, mark checkboxes on the left side. Then, click the **Download marked** button right above the table.



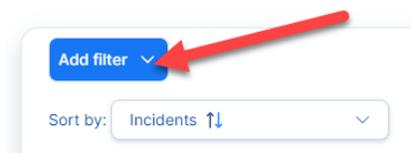
As you enter the **Audit list** page, audits are sorted by **Audit date**. To change this sorting, use the **Sort by** drop-down or the **arrow icons** in the table headers.

Sort by: Audit Date ↑↓

Loss Events ↓ Incidents Violations

Filter panel

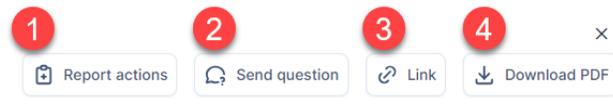
To filter the table, click the **Add filter** button.



Select one of the **Filter categories** on the left side of the screen. Next, select the specific items of interest in the menu(s) next to **Filter categories**. To apply the selected filters, click **Apply**.

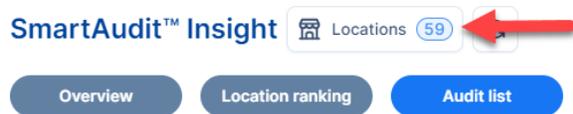
When you open a report, 4 buttons are displayed:

1. **Report actions**—log actions you have taken based on the SmartAudit™ report.
2. **Send question**—send any question(s) directly to auditors.
3. **Link**—copy the report link to the clipboard.
4. **Download PDF**—download the report as a PDF file.

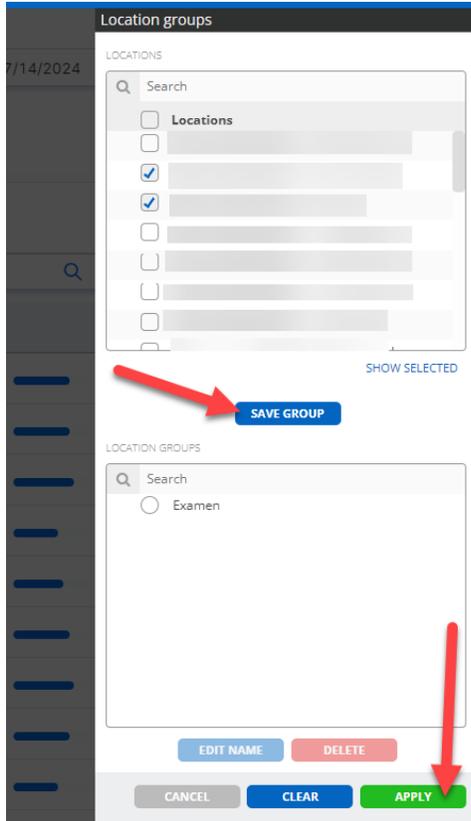


Manage Locations

To set global filters for the dashboard, click the **Locations** button at the top of the screen. A menu will pop up.



From here, you can choose locations, create a location group with the selected filters, and click **Apply** to save your changes.



For additional information or questions please contact [DTiQ Support](mailto:support@dtiq.com) at support@dtiq.com or your [Customer Experience Team](mailto:csr@dtiq.com) at csr@dtiq.com.



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