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Introduction

The CounterTools Store Audit Center is a comprehensive, paperless solution for planning and conducting data collection for projects in the retail food environment. It integrates team and project management, mobile data collection, the capture and storage of photos, and data reporting into an easy to use, web-based system.

*There are two roles in the Store Audit Center:*

1. **COORDINATOR**
   - A. Sets up a team
   - B. Enters or imports food outlet information
   - C. Builds a customized audit form
   - D. Assigns food outlets to team members
   - E. Sends audit invites to team members
   - F. Manages audit data and generates reports

2. **TEAM MEMBERS**
   - A. Receive audit invitation emails
   - B. Audit the assigned food outlets either on paper or using an Internet-enabled mobile device
Here are the six basic steps to using the Store Audit Center:

**STEP 1: CREATE A TEAM**
The coordinator gives their team a name and location, and then adds the names and emails for the team members. **Tip:** Make sure team members use email addresses that are easy to access on a mobile device!

**STEP 2: ADD FOOD OUTLETS**
The coordinator enters or imports names and addresses of food outlets to audit. In the system, “Stores” refers to all food outlet types. Once entered, the outlets are conveniently displayed on a Google map.

**STEP 3: BUILD AN AUDIT FORM**
The coordinator builds a customized audit form for the team to use in the field, using premade modules focusing on a variety of aspects of the food outlet environment.

**STEP 4: SET UP A CAMPAIGN**
The coordinator creates a “campaign”, which brings together team members, a particular category of food outlets (stores, restaurants or corner stores), and one of the audit forms (NEMS-S, NEMS-R or NEMS-CS) into a focused data collection effort. Team members can be assigned specific outlets to audit.

**STEP 5: COLLECT DATA**
The coordinator sends out an invitation email to team members, informing them which food outlets they’ve been assigned to audit. A team member can then either download a printable form or perform the audit on a mobile device. Team members complete the audit form at each location and the data is automatically saved by the system when the form is submitted. Photos may also be taken and uploaded using the audit form. **Tip:** It is recommended for members to always carry a paper copy of the audit as a back-up.

**STEP 6: GET A REPORT**
Data from a particular campaign or from all audits done using a given audit form can then be viewed or downloaded by the coordinator as graphical charts or a spreadsheet.
Getting Started

Go to http://audit.countertobacco.org and click Login to enter your assigned username and password. On the Login page, you’ll also see tabs that allow you to request a new password if you’ve forgotten your password or would like to change it.

Dashboard

The Dashboard is your homepage. If you get lost or confused, you can always return to your dashboard and start again from there. Your dashboard provides statistics on the number of campaigns created and audits performed by your team as well as by all Store Audit Center users. It also offers quick links to Common Tasks such as adding a team member or selecting a campaign to view.

On the right side of each page on the Store Audit Center, you’ll see links for changing your password, viewing your account details, and logging out. In addition, you’ll see a font size control, which allows you to make the page text larger or smaller by clicking the A icons.

TIP

For an optimal experience, please use the most recent version of your browser: Internet Explorer 9+, Firefox 15+, Chrome 21+ or Safari 5+

Use the Black Menu Bar to navigate the site.

Counter Tools
Step #1: Create a Team

The first step in using the Store Audit Center (before you can do anything else) is to set up your team. Click on My Team in the black menu bar to get to the My Team page. Enter a team name, city, and state into the Team Information section to set up your team.

Add members to your team by entering their information into the Add A Member section and decide whether you want them to be Active or Inactive – if they’re Inactive, they won’t get emails from the Store Audit Center. You can also use the Email My Team section to contact your entire team at once.

1. Add yourself as a team member to start
2. Use email addresses that can easily be accessed from a mobile device
Step #2: Add Stores

Next, using the black menu bar, go to the Stores page to add the location of the food outlets you want your team to audit. (Note that where it states “Store” on the screen, any food outlet can be entered, not just stores.) They can be added one at a time using the Add a Store section. Simply type the name of the food outlet, the complete address and save it to the list. Or, you can batch upload a list of the food outlets (stores or restaurants).

To upload a list of food outlets:

1. Click the Batch upload stores link in the Store List section.
2. Click the Excel template link on the Import Stores page to download the template.
3. In Excel: Paste your list of food outlet names and addresses into the template; make sure that the pasted information matches the columns in the template and save it as a .xls file.

After entering or uploading your food outlets, they will show up on a Google map. The complete list of food outlets can be downloaded as a spreadsheet by clicking on the Export stores to Excel link at the bottom left corner of the Store List section.
Step #3: Build an Audit Form

Once you’ve added the places to audit, go to the Audit Forms page in the black menu bar where you’ll build your own NEMS audit form with the premade modules. You will find each measure in NEMS-S and NEMS-CS listed separately (e.g. NEMS-S Measure 1: Milk) as well as the NEMS-R saved as different sections in the drop down list. This gives you the option to select all or just some of the NEMS measures you want your team to collect.

Adding a new form:

1. Under Add a Form, give the form a descriptive name.
2. Select a module from the drop-down menu. (Note that all of Countertools clients’ forms are listed.)
3. Click Add Another Item to add another module. If you add a module by mistake, check the delete box.
4. Click Save when you are finished creating your audit form.

You can reorder the modules by clicking the cross icon next to a module and dragging it to a different location.

TIP

Spreadsheets and reports generated from the Audit Forms page will display aggregated data collected by every Store Audit Center user who utilized that audit form in a campaign.
NEMS Tips for Building an Audit Form

The Store Audit Center houses all of the forms of Counter Tobacco clients. When you click on the down arrow to build your own form, you will see some modules that are not relevant to NEMS. The NEMS forms are all clearly labelled. Listed below are some items to keep in mind, specific to the NEMS tools.

1. NEMS-R, S, and CS are broken down based on the main headers from the original tools. You can see the list in the dropdown box on the right. The exceptions to this would be the few extra modules not part of the original tools: the photos modules and the “customize your own measure” in a NEMS-like format. You can choose whichever modules you want to include in your form, mixing any of the three. **Tip:** When selecting the modules for a store audit, make sure to select or order the modules in a way that reflects a typical store layout or raters will be walking back and forth a lot!

2. If you would like raters to be able to upload photos, add the NEMS photo module. We recommend placing this module last in the audit form. Raters can take the photos at any time.

3. If you opt to not include the photos module but would like the end screen to not show the last measure completed, add “Base Module” to the audit form. You can see in the box to the right, how the audit will end if you do select “Base Module”. Otherwise, warn raters ahead of time that after hitting “Save and Submit” for the final module, a blue bar will appear at the top with Great News! Your audit has been successfully submitted.” Right below it is the last module that was just submitted which confuses some raters initially.
Step #4: Set Up a Campaign

The fourth step in coordinating audits is creating a specific Campaign. Go to the **Campaigns** page using the black menu bar. Here you will create a “campaign”, which brings together team members, food outlets, and an audit form into a focused data collection effort. Campaigns are often organized around a particular geographic area (e.g., county or city) or data collection period with a specific NEMS audit form. Only one audit form can be linked to a specific campaign so name it carefully. For example, if you wanted to collect NEMS-S and NEMS-R data in the same area, you would need to create two separate campaigns.

*Creating a Campaign:*

1. Select a name for your campaign under the **Add a Campaign** section.
2. Enter a start date if you have one.
3. Choose the audit form you want to use for the campaign.
4. Choose whether or not team members may add stores or see all stores on map.
   a. **Team Members may add stores** lets you decide whether team members can add and audit new places while in the field.
   b. **Team Members see all stores on map** controls whether team members can see only the places they’ve been assigned to audit, or all of the stores or restaurants in the campaign.
5. Enter instructions for your team members if desired – these will show up at the top of the form every time a team member performs an audit. Some may have a specific script for the team members to use as an introduction.
6. Click **Save** when you are finished.

TIP: If you have multiple campaigns, be strategic about your campaign naming convention; it will make it easier to manage them later.
Assigning Stores to Team Members:

1. Click on the name of the campaign in the My Campaigns section; this will take you to the Store Assignments page.
2. Go to the Create New Store Assignments section.
3. Add one or more food outlets from the Stores sub-section.
   a. You can click on the Add button to the right, or the Add All button.
4. Add one or more team members in the Team Members sub-section.
   a. You can click on the Add button to the right, or the Add All button.
5. The stores and team members you’ve added will move down into a You have selected area; Verify your selections before creating the assignments.
6. Click Make Assignments to add selections to Current Store Assignments.
   If you have a large number of food outlets and/or team members, you can narrow the list using the filter fields at the top of each column. If you enter text there, only those stores matching the text you entered will be displayed in the list. You can clear filters by deleting the text from the field or clicking the Clear Filter button. The list can also be sorted by clicking on any of the column names.
The **Current Store Assignments** section displays the current assignments for the campaign. You can sort the assignments by clicking on any of the column headings. To delete an assignment(s), check the box to the left of it and then click the **Delete Selected** button.

**How to Invite** team members to collect data and **Do Audits** will be covered in the next section.

**Export** an Excel spreadsheet of all the data collected in the campaign.

**Get a PDF version of the audit form** to **Print**.

**View, edit or delete individual audits**.

**Get a graphical Report of the data**.
Step #5: Collect Data

There are two ways to collect data using the Store Audit Center: on a mobile device in the field or on a paper audit form to be entered into the system at a later time. In order for a team member to begin collecting data, they must first be invited.

To invite your team members to start an audit:

1. Go to the Campaigns page in the black menu bar.
2. Click the Invites link in the My Campaigns section.
3. On the Send an Invitation page, using the Team Members drop-down menu, choose if you want to send invitation emails to all team members who have stores assigned to them or choose one team member to send an invitation to.
4. You will need to customize the subject and text of the email in the Message section; the message is already set to automatically fill in the names and campaign details.

The team member(s) will receive an email with a list of stores with clickable links that will open in the mobile device’s maps application. Additionally, the email will contain customized links that allow them to access the Store Audit Center to perform their audits, or get a printable audit form.
**Mobile Data Collection**

1. Click on the link in the email to perform audits online.

2. View a map with the food outlets to be audited and click on the individual map pins. Or, click **View List** link above the map to display the places to be audited as a list, which can be helpful on mobile devices.

3. Below the address of each food outlet that’s been assigned to a team member—and hasn’t yet been audited—is a link with a team member’s name; Click this link and start the audit for that place.

Each module in the audit form will be listed at the top; the **Save** button will be at the bottom of each module.
If you selected the **Team Members may add stores** option when you set up the campaign (p. 7), the team member will see the **Add and Audit a Store** section at the bottom of the page. This allows the team member to input the information for a new store or restaurant and select himself or herself as the auditor in the **Acting as Team Member** drop-down menu. By entering the food outlet information and clicking **Save and Audit**, the team member will be taken straight to the audit form for the new store or restaurant, and it will be added to the list in your account.

After entering data for the food outlet, the team member will be taken back to the audit selection page where they can choose or add a new location to audit if desired. After completing the audit, the link to enter the audit as that team member will disappear from the list and be replaced by the date and time it was audited.

**Paper Data Collection**

To collect data using paper forms, team members can click on the email link to print the form. This will generate a PDF file of the campaign’s audit form with the campaign name, start date and instructions, as well as blanks for entering the team member’s name, the date and time of collection, and the name of the store or restaurant being audited. The data can be collected on paper using this form and then entered by the team member on a computer using the directions from the mobile data collection section above. Alternatively, the Coordinator can go to My Campaigns, print the forms and follow the steps below when entering the data:

1. Go to the **Campaigns** page in the black menu bar.
2. Click on the **Do Audit** link to the right of the name of your campaign.
3. Enter an audit by clicking the link with the assigned team member’s name.
   a. Use either the map or the list view.
4. Enter data from the paper audit form for that particular outlet in the web-based form.
5. After completing the audit, the link to enter the audit as that team member will then disappear from the list and be replaced by the date and time it was audited.

If the paper data you’re entering is from a store or restaurant that isn’t already in your campaign, click the **Do Audit** link as above and enter its name and address into the **Add and Audit a Store** section at the bottom of the page. Choose the team member who completed the audit from the **Acting as Team Member** drop-down menu, and click the **Save and Audit** button to enter the audit.
Uploading Photos

If your audit form module contains fields for uploading photos, the interface for uploading will depend on the device you’re using.

If you’re using an iOS device, like an iPhone or iPad:

1. Tap the Choose File button.
2. Choose either to take a new photo or choose one from your photo library.

If you’re on a PC or Mac:

1. Click the Choose File button to browse for the image file you want to upload.

Managing Your Team’s Data Collection

Editing a completed audit:

1. Go to the Campaigns page using the black menu bar.
2. Click the View Audits link to the right of the campaign containing the audit.
3. On the Completed Audits page, click the Edit link to the right of the audit you want to edit.
4. Edit any data.
5. Click Save and Next to move through the modules.
6. Click Save and Done when you get to the end; When you’ve submitted the changes, you’ll see a confirmation message on the Completed Audits page.

Deleting a completed audit:

1. Go to the Campaigns page.
2. Click the View Audits link to the right of the campaign containing the audit.
3. On the Completed Audits page, click the Delete link to the right of the audit you want to delete.
4. You’ll get a message asking you to confirm that you want to delete the audit; Click Delete. You’ll see a confirmation message on the Completed Audits page.
Step #6: Get a Report

To get a report on a campaign:

To get a graphical data report for one of your campaigns, go to the Campaigns page. Using the black menu bar, click the Report link farthest to the right of the campaign. This will give you a web-based version of the report that's great for viewing on screen and will allow you to save chart images for presentations or other uses (right-click on the chart and save image). There will be a Generate PDF link at the top of the report that will give you a PDF version that's great for printing or sharing.

To download an Excel spreadsheet showing all audit data for a particular campaign, click the Export link to the right of the campaign.

To get a report on an audit form:

To get a graphical report for a particular audit form—which will display data for all audits completed by Store Audit Center users using that audit form—go to the Audit Forms page in the black menu bar and click the Report link farthest to the right of the audit form. Similar to a campaign report, this will give you a web-based version of the report that's great for viewing on screen and will allow you to save chart images for presentations or other uses. There will be a Generate PDF link at the top of the report that will give you a PDF version that's great for printing or sharing.