



## HME CLOUD

### **OPERATING INSTRUCTIONS**

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## **OVERVIEW**

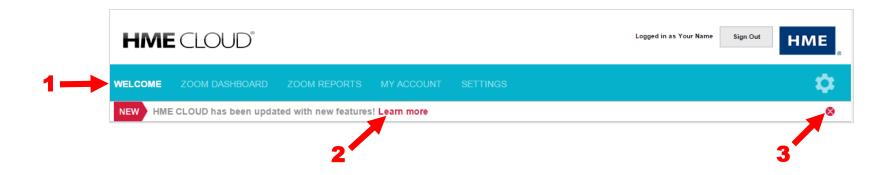
The HME CLOUD™ provides remote access to ZOOM® systems and data for any/all of your stores.

When your ZOOM® systems settings and data have automatically been imported into the HME CLOUD™, you can access the HME CLOUD™ via PC, tablet or smartphone from remote locations.

These instructions provide guidance to understand the HME CLOUD™, and how to manipulate data within it.

## USING THE HME CLOUD TM

The following describes how to navigate and interpret the HME CLOUD™ menus and displays in order to operate your Drive-Thru more effectively. The topics shown on the menu bar: ZOOM DASHBOARD, ZOOM REPORTS, MY ACCOUNT, SETTINGS and the Gear icon (♣) will be explained.

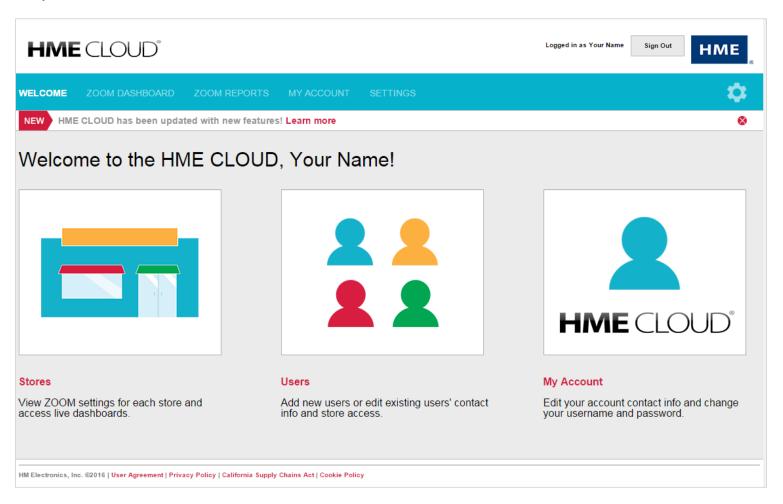


- 1 Click your cursor on any of the menu topics to enter that area. The main page for that topic will open, and the topic will be highlighted on the menu bar.
- 2 Click on the **Learn more** to view a summary of newly updated features.
- **3** When you have reviewed the summary of new features, you can remove it by clicking on the ⋄. Any time new features are added to the HME CLOUD<sup>™</sup>, this new-features update will reappear.

#### **WELCOME**

Each time you log into the HME CLOUD™, you will see the WELCOME page. Note that WELCOME is highlighted on the menu bar.

To continue, click on any of the other topics on the menu bar, or on the boxes shown for Stores, Users or My Account.



#### **DISPLAY SETTINGS / HELP**

On the WELCOME page, click the Gear icon (\*) to access the options for **Display Settings**, **Customize Leaderboard** or **Help**. When you're finished making changes, select **Save Changes**. The **Help** option directs you to the *Frequently Asked Questions* (FAQ) page.

# Display Settings Customize Leaderboard Help

#### **Default Dashboard View**

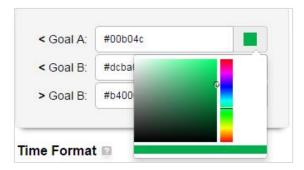
Select a default view for your single-store and multi-store dashboards by selecting either *Daypart*, *Day*, *Week*, *Month* or *Custom*\*. This will be the view displayed anytime the ZOOM Dashboard option is selected from the navigation bar.

Current: Day				
Cars	Avg <b>₄</b>	Goal%		
381	91	46		
804	104	54		
448	130	14		
585	153	1		
377	167	65		
339	168	99		
102	185	17		
78	194	8		

Default Dashboard View M Day Daypart Primary Goal Colors M #00b04c < Goal A: < Goal B: #dcba00 #b40000 > Goal B: Time Format M Minutes: Seconds Pull-ins 🔟 Include

<sup>\*</sup>You must first configure a customized dashboard before selecting the custom option as your default view (see <u>Customize Dashboard</u>, pg. 10.

#### **Primary Goal Colors**



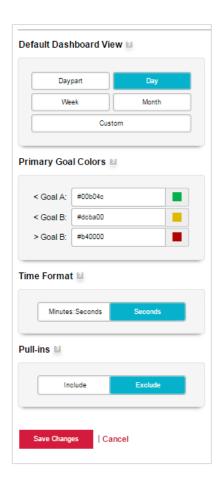
Select a custom goal color for your master A, B and over B goals by using the color pickers\*. These colors will allow you to easily identify the performance metrics for each of your stores.

#### **Time Format**

Select the default time format\*\* that will be shown on your dashboards and reports.

#### **Pull-Ins**

For dashboards and reports, you can choose to either include pull-in\*\*\* data or exclude it.



<sup>\*</sup> You can also manually enter the hexadecimal value of the color if you prefer.

<sup>\*\*</sup> Time format may be shown in minutes: seconds or in seconds.

<sup>\*\*\*</sup> A pull-in is a vehicle that entered the drive-thru lane after the first ON detection point, and exited through the last ON detection point.

#### **ZOOM DASHBOARD**

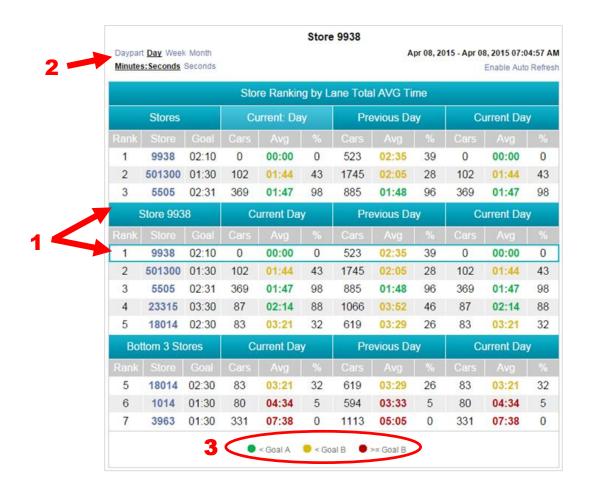
The **ZOOM DASHBOARD** is the main page that displays information about activity in the drive-thru lane. When the page opens, each store's activity for the current day is highlighted in green, yellow, red or the user created custom colors. Green indicates service-time goals are being met; yellow indicates service times are marginal; red indicates poor service times, below established goals.

1 You can select the time window that will be shown in the color-coded columns by clicking on the respective time interval (**Day**, **Week** or **Month**) in the upper-left portion of the Dashboard display. You can also toggle the display between Minutes: Seconds or just Seconds. When you log out, the display settings you selected will return as defaults for your account the next time you log in.

2 You can sort the data for any of the metrics that you want to prioritize on the Dashboard by clicking on the metrics in the gray bar over the data columns.

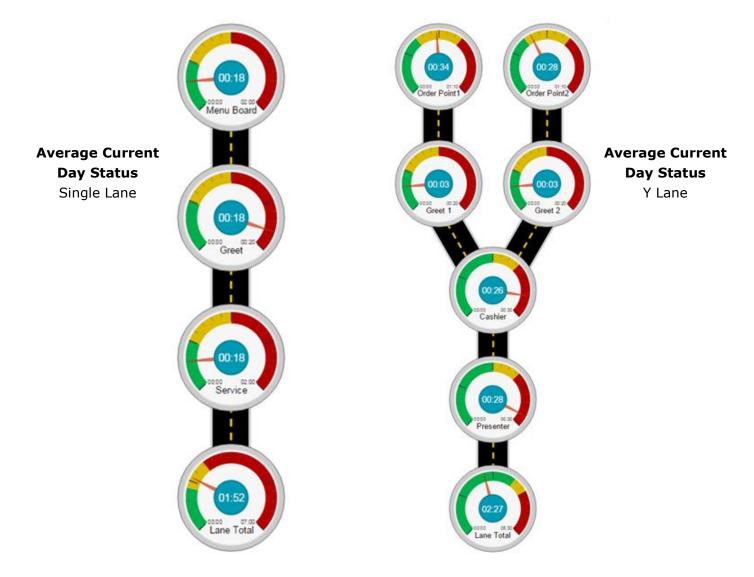


3 If you click on any store number, you will be able to view the following store status displays.

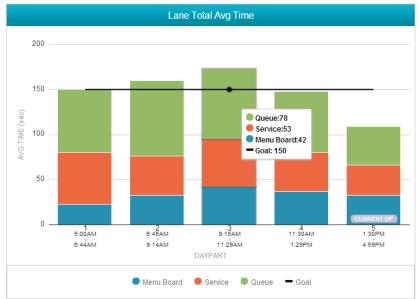


The **Store Ranking** table shows the 3 highest ranking stores at the top, **1** the store you selected in the middle, and the 3 lowest ranking stores at the bottom. **NOTE:** If there are less than 6 stores in your account, you will only see the middle section of this table. **2** You can select the time window that will be shown in the Store Ranking table; Daypart, Day, Week or Month. **3** The colors of the numbers in each of the Avg. columns indicate that the average time is within the desired service goal (green), marginal (yellow) or exceeding the goal (red).

The dial gauges show what degree the performance level is in the green, yellow, or red portion of a measurement. The Lane Total = Menu Board + Service window + lane queue time. Greet is not a component of the Lane Total, as it overlaps with the Menu Board time. In this example, the Single Lane Total is in the yellow performance level, and the Y Lane Total is in the green.



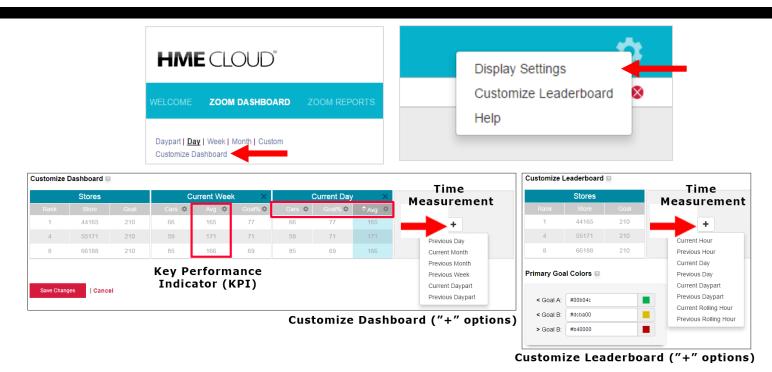




The **Lane Transactions** and **Lane Total Avg Time** charts show the details associated with the Store Ranking table. Hover the mouse over a bar chart to reveal the details associated with a time period. In this example, when the daypart change happened at 6:45AM, the number of Lane Transactions increased and the proportion of cars in the red performance level also increased.

The Lane Total Avg Time went up in daypart two and the queue time grew substantially while the Service time went down and the Menu Board time increased slightly.

#### **Customize Dashboard/Leaderboard**



The process for customizing the *Dashboard* and *Leaderboard* is the same. From the Zoom Dashboard screen, select **Customize Dashboard** to create or modify a custom view on the Dashboard. From the Gear icon (\$\square\$), select **Customize Leaderboard**.

To create a customized dashboard or leaderboard, begin by selecting a *Time Measurement\** using the plus sign (+) in an open column.

There are eight available time measurements:

**Custom Dashboard:** Current Week, Current Day, Previous Day, Current Month, Previous Month, Previous Week, Current Daypart and Previous Daypart.

**Custom Leaderboard:** Current Hour, Previous Hour, Current Day, Previous Day, Current Daypart, Previous Daypart, Current Rolling Hour and Previous Rolling Hour.

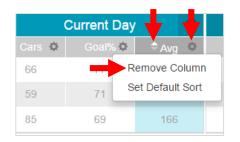
To remove a *Key Performance Indicator* (KPI)\*\* from a time measurement, click on the (\*) icon next to the KPI you'd like to remove, then select **Remove Column**.

To add a new KPI (Cars, AVG, Goal%), use the plus sign (+) exposed after deletion.

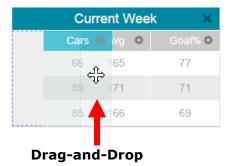
**Cars** are the total number of cars that have been counted for a respective time measurement; **Avg** is the average total 1 time for a respective time measurement; and **Goal%** is the percentage of cars that have come in underneath their *Goal A* times for a respective time measurement.

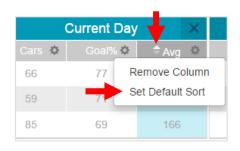
To switch a *Time Measurement* position with another time measurement or switch a KPI with another KPI, simply click on the column heading or KPI you want to move and drag-and-drop it to a new location.

Click on a column's Gear Icon ( $\textcircled{\bullet}$ ) to access the **Set Default Sort** option, and adjust it using the  $\blacktriangle$  or  $\blacktriangledown$  arrows next to the category name [sort to Ascending ( $\blacktriangle$ ) or Descending order ( $\blacktriangledown$ )]. The default sort establishes the KPI by which all of your stores are ranked.





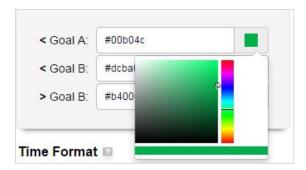




<sup>\*</sup> Some Time Measurements for Custom Dashboard and Custom Leaderboard differ.

<sup>\*\*</sup> Valid Key Performance Indicators (KPI) are Cars, Avg and Goal%.

#### **Primary Goal Colors (Custom Leaderboard)**



Select a custom goal color for your master A, B and over B goals by using the color pickers\*. These colors will allow you to easily identify the performance metrics for each of your stores.

#### **Time Format**

Select the default time format\*\* that will be shown on your dashboards and reports.

#### **Pull-Ins**

For dashboards and reports, you can choose to either include pull-in\*\*\* data or exclude it.



<sup>\*</sup> You can also manually enter the hexadecimal value of the color if you prefer.

<sup>\*\*</sup> Time format may be shown in minutes: seconds or in seconds.

<sup>\*\*\*</sup> A pull-in is a vehicle that entered the drive-thru lane after the first ON detection point, and exited through the last ON detection point.

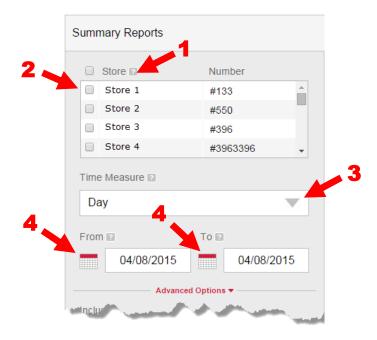
#### **ZOOM REPORTS**

The **ZOOM REPORTS** page allows you to select and view summary reports from ZOOM® system data for various time periods. You can then email csv or pdf versions of the reports.

WELCOME ZOOM DASHBOARD ZOOM REPORTS MY ACCOUNT SETTINGS

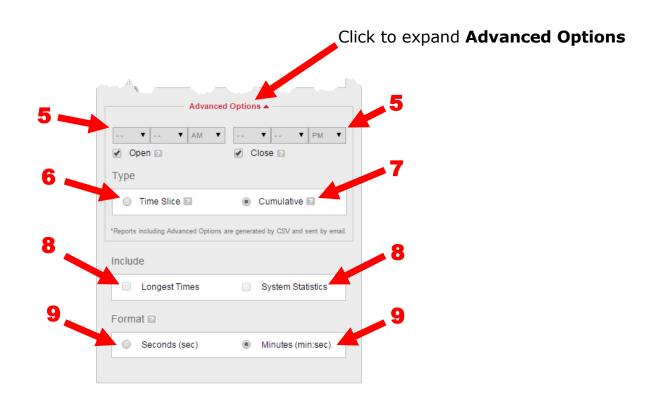
On the **Summary Reports** page, place your cursor over the question mark next to any topic for an explanation of its function.

- **2** Click on the box next to each store you would like to have shown on the report, or click on the **Store** box at the top to select all stores on the list. If there are more than four stores listed, use the scroll bar on the right to scroll down the list.
- 3 Click on the arrow to select how you want the data displayed: Day, Daypart, Week, or Raw Data.
- 4 Click on the **From** and **To** calendar icons to select the desired start and end dates for the report.

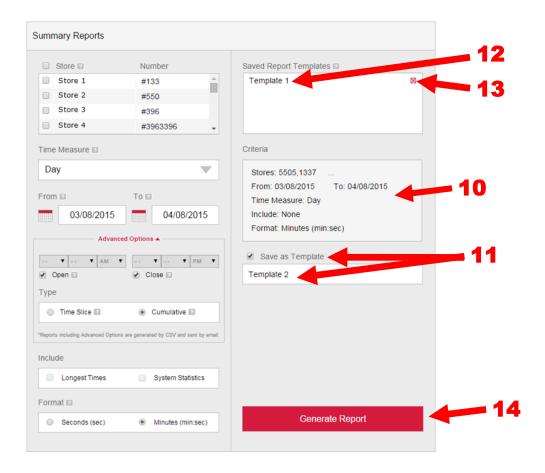


- **5** Either leave **Open** and **Close** checked for the report to show data for the store hours configured in ZOOM®, or deselect **Open/Close**, and click on the arrows to select the desired start and end times.
- 6 Select **Time Slice** if you want the report to show only the data between the times chosen in #5, during each day of the time period chosen in #4.
- **7** Select **Cumulative** if you want the report to show all data beginning with the **From** date and time chosen in #4 and #5, and ending with the **To** date and time chosen in #4 and #5.
- 8 Select **Longest Times** and/or **System Statistics** if you want to include them in the report (only available for single-store reports).
- 9 Select the report format to be in **Seconds** or **Minutes/Seconds**.

**Note:** Reports that include Advanced Options are generated by CSV and sent to the user email address entered during login.



- **10** A summary of your chosen report criteria is displayed. "**Select a Store**" is displayed next to "Stores" if there are no stores selected.
- 11 To generate reports quickly, your search criteria can be saved as a Report Template. Click the box next to **Save as Template** to add a check. Enter a name for your template. Once the report is generated, the template will be saved.
- 12 Saved Report Templates are displayed here. Click a saved report, then click on the Generate Report button to generate the report. You can save up to 10 templates. 13 Click the red box to delete a saved report template.
- 14 Click on the red Generate Report button to generate the report.



#### **SUMMARIZED REPORTS**

When a report for a single store is generated, the rows are broken down into Days, and the color-coated columns are broken into the average time for the metered events of the drive-thru.

- 1 While reviewing summarized reports, click **Pages** to expand the screen to include all pages, or you can click < or > to view each page.
- 2 Click on an individual day to Open or Close the displayed graph broken into Dayparts.
- 3 Click the Email Report drop-down to have a summarized report emailed as a PDF or CSV file.

Note: Emailed reports are sent to the user email address entered during login.



Once you open a specific day in the report, that day will be displayed in Dayparts.

1 The rows on the graph are broken down into shifts, and the color-coated columns display the average time for the metered events of the drive-thru. The shift time is displayed beneath each Daypart.



#### **GOAL STATISTICS**

Below Day and Daypart Summarized Reports are the Goal Statistics for the day or daypart. Displayed are the average performance per event, based on the criteria chosen to generate the report.

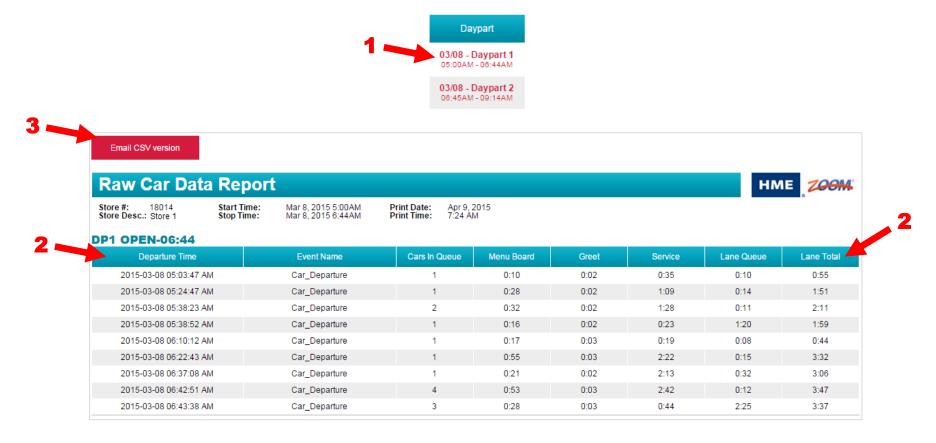
_	AVERAGE PERFORMANCE PER EVENT				
	Menu Board	Greet	Service	Lane Queue *	Lane Total
oal A (min:sec)	1:00	0:05	1:00	0:30	2:30
Cars	3651	3402	2511	727	1471
%	85%	79%	58%	17%	34%
oal B (min:sec)	1:30	0:10	1:30	0:30	3:30
Cars	457	744	746	0	1005
%	11%	17%	17%	0%	23%
oal C (min:sec)	2:30	0:15	2:30	0:00	5:00
Cars	181	102	677	0	1026
%	4%	2%	16%	0%	24%
oal D (min:sec)	3:00	0:20	3:00	1:00	7:00
Cars	12	26	130	958	597
%	0%	1%	3%	22%	14%
al D (min:sec)	3:00	0:20	3:00	1:00	7:00
Cars	7	34	244	2623	209
%	0%	1%	6%	61%	5%

	AVERAGE PERFORMANCE PER EVENT				
	Menu Board	Greet	Service	Lane Queue *	Lane Total
ioal A (min:sec)	1:00	0:05	1:00	0:30	2:30
Cars	363	397	234	127	155
%	79%	87%	51%	28%	34%
ioal B (min:sec)	1:30	0:10	1:30	0:30	3:30
Cars	65	52	81	0	95
%	14%	11%	18%	0%	21%
ioal C (min:sec)	2:30	0:15	2:30	0:00	5:00
Cars	26	8	85	0	120
%	6%	2%	19%	0%	26%
oal D (min:sec)	3:00	0:20	3:00	1:00	7:00
Cars	3	1	17	93	65
%	1%	0%	4%	20%	14%
oal D (min:sec)	3:00	0:20	3:00	1:00	7:00
Cars	1	0	41	238	23
%	0%	0%	9%	52%	5%

#### **RAW CAR DATA REPORT**

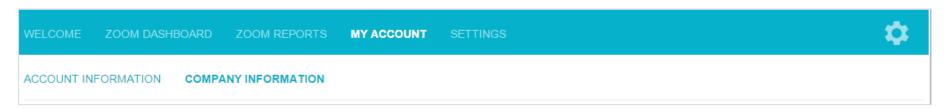
- 1 When you click on a daypart listed from a Summarized Report, a Raw Car Data Report for that daypart is generated.
- **2** Lane event times are broken down for each car that passed through the drive-thru, including the Lane Total time and Departure Time.
- 3 Click the Email CSV version button to have a summarized report emailed as a CSV file.

Note: Emailed reports are sent to the user email address entered during login.



#### **MY ACCOUNT**

When you select **MY ACCOUNT**, the **ACCOUNT INFORMATION** page appears, showing your basic account information. To view your company information, click on **COMPANY INFORMATION**.

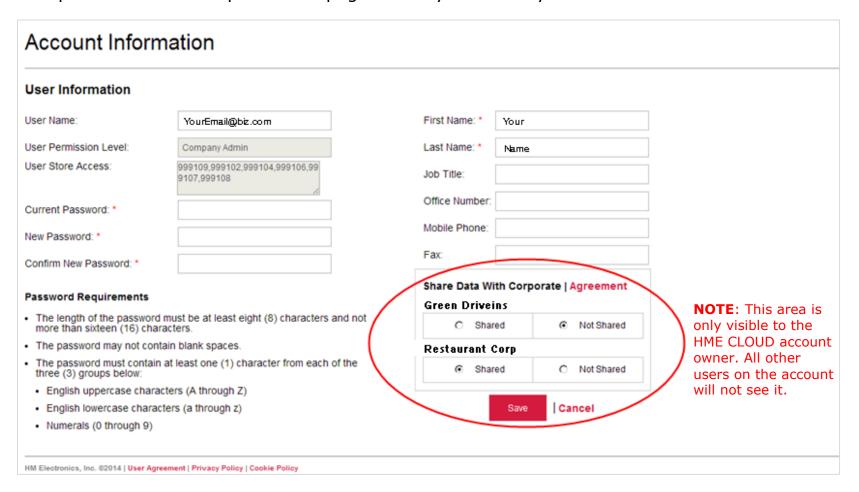


Explanations and examples of ACCOUNT and COMPANY INFORMATION are on the following pages.

#### **ACCOUNT INFORMATION**

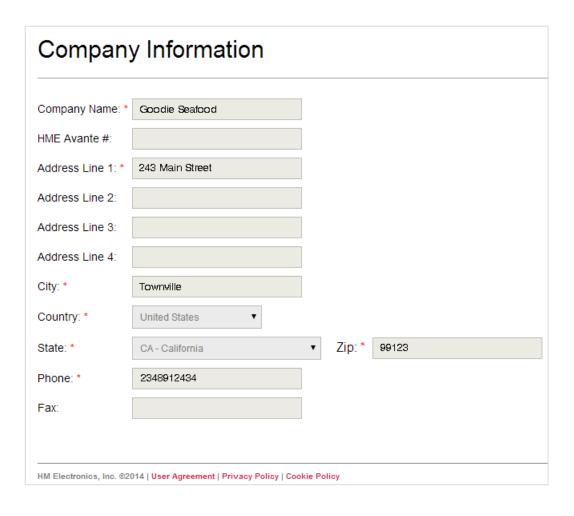
The **ACCOUNT INFORMATION** page allows you to view/edit your HME CLOUD™ account information, and to change your password. Click on the desired field to enter or change any information. If you change the password, a confirmation email will be sent to your email address.

At the lower-right of the page, account owners can elect whether or not to share their store data with their corporate office. This part of the page will only be seen by account owners.



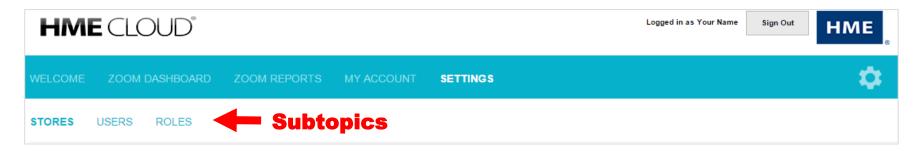
#### **COMPANY INFORMATION**

The **COMPANY INFORMATION** page allows account owners to view/edit information about their company. Other users can view, but cannot edit the information.



#### **SETTINGS**

The **SETTINGS** page provides subtopics pertaining to the stores and users under your control. Click on a subtopic to view or change any pertinent information.



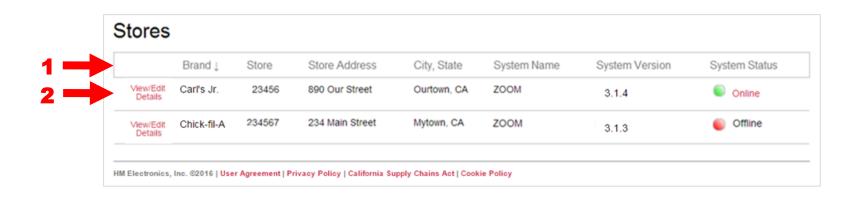
Explanations and examples of these subtopics are on the following pages.

#### **STORES**

The **STORES** page allows you to view a list all of your stores, including their  $ZOOM^{\otimes}$  software version, and whether or not they are currently online with the HME CLOUD<sup>TM</sup>.

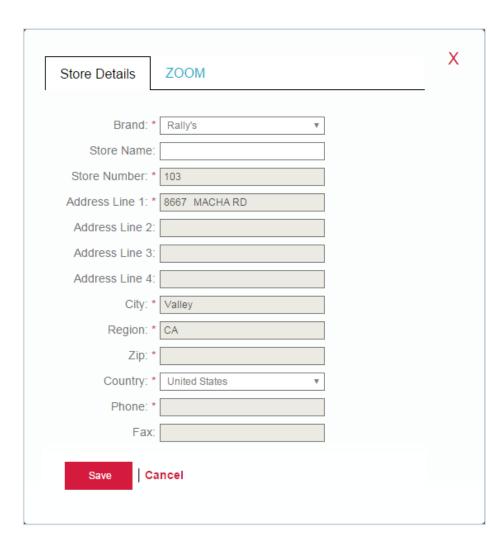
When a new ZOOM® timer system is installed and configured with the correct email address, it will automatically appear in Stores.

- 1 You can sort data on the list by clicking on any of the gray headings above the data columns, and reverse the order of the column by clicking again on its heading.
- **2** Any user with the respective permissions, can view and edit the store name for any store on the list by clicking on **View/Edit Details** to the left of the store entry, and then adding/changing data (<u>next page</u>). See <u>ROLES</u>, pg. 25, to learn about setting permissions.



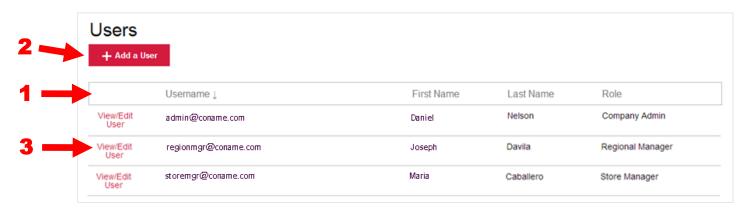
#### **View/Edit Details**

View and/or edit the details for a listed store. An entered *Store Name* will display that store name on *Summary Reports*, *Generated Reports* as well as the *Leaderboard*. Select **Save** when you've updated store details. The **ZOOM** tab displays the ZOOM registration information.



#### **USERS**

The **USERS** page allows all users to view a list of all personnel with access to their HME CLOUD™ account, and 1 rearrange data on the list by clicking on any of the gray headings above the data columns. Users with permission can add, edit or remove users as follows. Users with permission: 2 can add users to their list by clicking on **Add a User**; 3 can view/edit information for any user on the list by clicking on **View/Edit User** to the left of the Username, and then add/change data on the **User Details** display; 4 can remove existing users from access to the HME CLOUD™ account by clicking on **Remove User**; 5 when adding a user, can choose the appropriate role for that user; 6 can select the store(s) data to which this user will have access by clicking on the appropriate boxes; 7 can save their entries by selecting **Save**, or select **Cancel** to exit without saving.

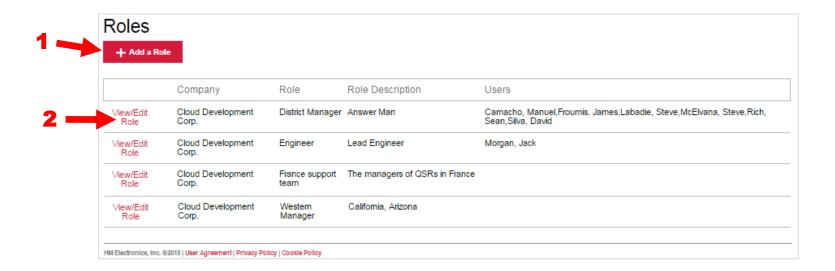




#### **ROLES**

Users with permission can add, edit or delete Roles as follows.

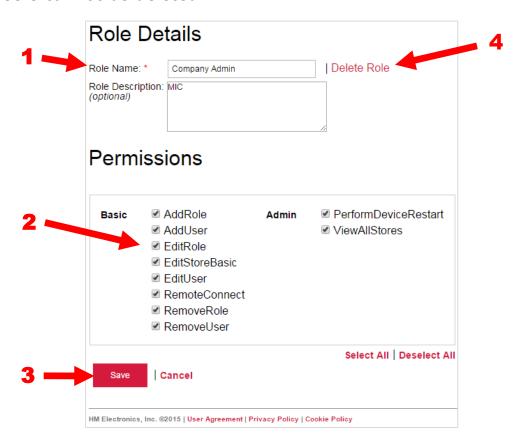
1 To add a new Role, click on **Add a Role**. 2 To view or edit an existing Role, click on **View/Edit Role** to the left of the desired Role. On the page that appears, you will be able to edit the selected Role and add/delete permissions for that Role.



If you selected **Add a Role** or **View/Edit Role**, the following page will appear.

- 1 Enter any desired name for the new Role. An optional description of the Role can be entered below the Role Name.
- **2** Check the box for each permission you would like to assign the new Role. At least one box must be checked.
- 3 Click on **Save** to save the new Role as entered.
- 4 Permanently delete a Role.

**Note:** Before you can delete a role, you must first reassign users to another role. Roles that still contain associated users cannot be deleted.



#### **HELP**

Click on the Gear icon (\*\*), then click **HELP** on the menu bar. A list of Frequently Asked Questions will appear. If none of the advice provided answers your question, contact your HME® dealer/distributor, or the HME Technical Support department as follows:

Phone: 800.848.4468 • Fax: 858.552.0172 • Email: cloudsupport@hme.com • Web: www.hme.com