

Navigating and Generating **Scheduled Reports** in the HME CLOUD® Reporting System

Create New Scheduled Report User Guide

1. General Information

REPORT NAME
• Report Name

SUBJECT
• Subject

RECIPIENT EMAIL
• Recipient email

REPORT FORMAT
• XLSX

2. Type & Timing

TYPE
• Summary - Single Store

PULL-INS
Include Exclude

TIME FORMAT
Minutes:Seconds Seconds

TIME MEASURE
• Daypart

TIME ZONE
• (GMT-12:00) International

RECURRENCE
• Monthly

DAY OF MONTH
• Monthly-01

3. Filters & Layout

STORES

- Store Manager (Lauren)
- Store Manager (Lisa)
- Store Manager (Paul)
- 4444-Super Sandwi... HME
- 7658-Super Sandwi... HME
- 7896-Super Sandwi... HME

Select All | Deselect All

DAYPARTS

- Daypart 1
- Daypart 2
- Daypart 3
- Daypart 4

Select All | Deselect All

Cancel Save

HME CLOUD

Reports Overview

Recently Viewed Reports

- Raw Car Data Report
- Performance Analysis
- Outliers Dashboard
- Trends Report

Recently Viewed Templates

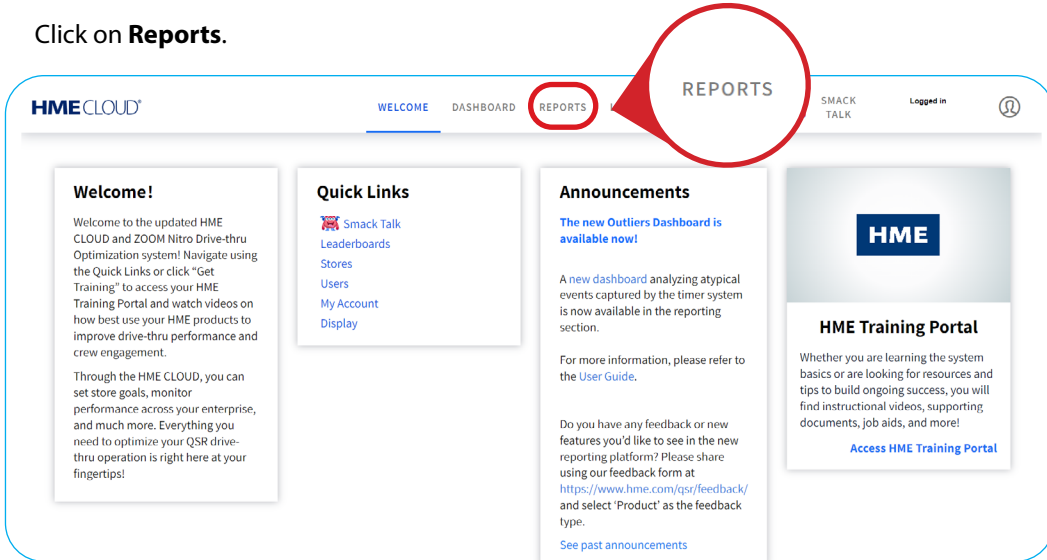
No templates have been visited yet

Super Sandwich - Vista

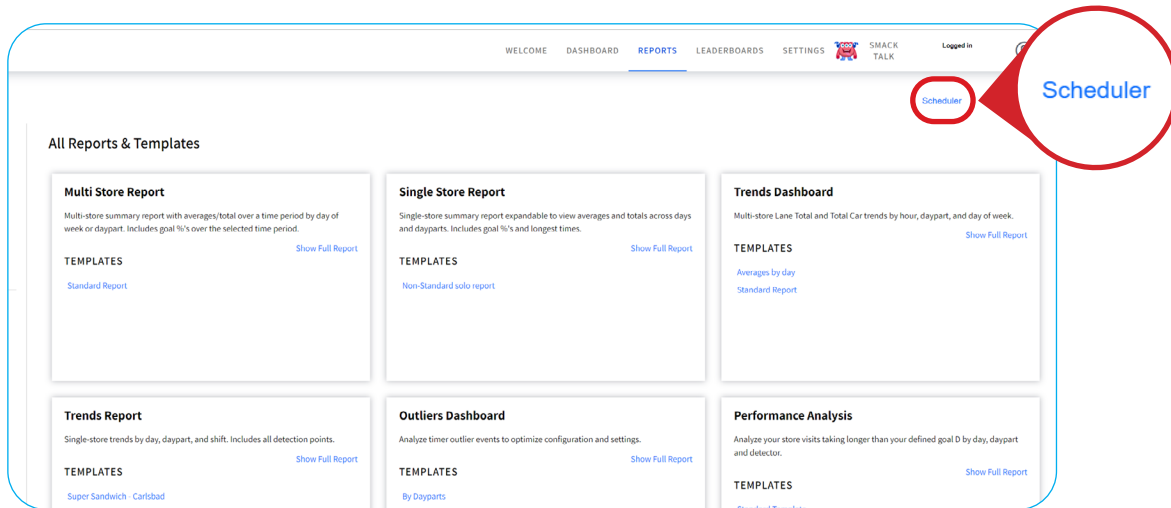
Raw Car Data Report
Raw drive thru event data by store. [Show Full Report](#)

Scheduled Reports

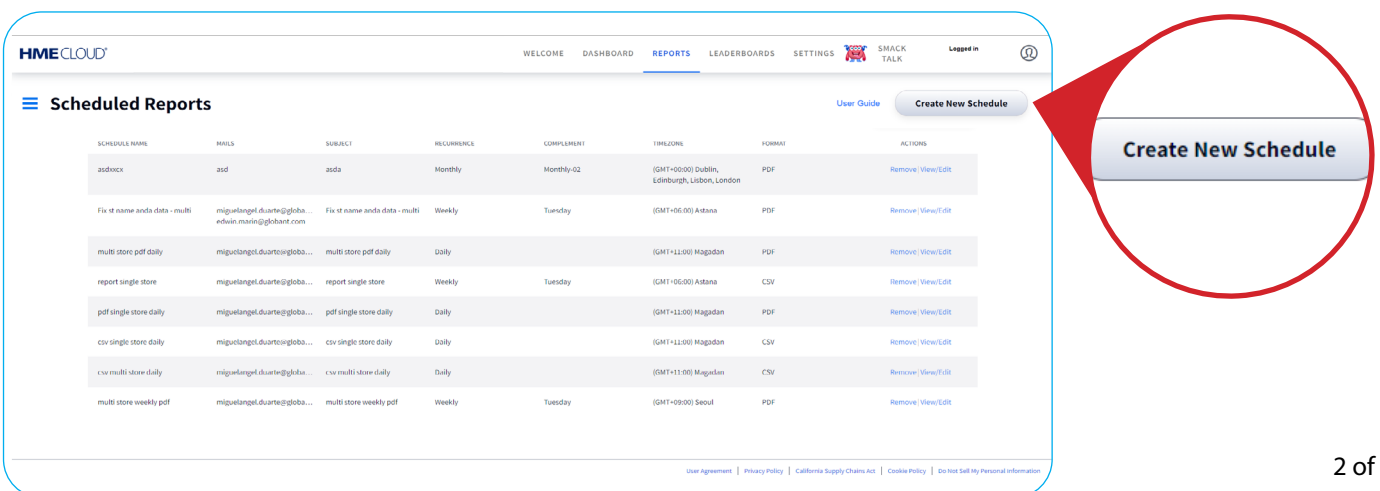
1. Log on to the to your HME CLOUD account.
2. Click on **Reports**.



3. You will be taken to the **Reports Overview** page.
4. Select **Scheduler** near the top-right of the page.



5. Click on **Create New Schedule** to create schedule from scratch.



6. Input the Scheduled Report information under **General Information**, including **REPORT NAME**, **SUBJECT**, **RECIPIENT EMAIL**, and **REPORT FORMAT**.

Note: More than one email address may be added.

The screenshot shows the 'Create New Scheduled Report' form in HME Cloud. The 'General Information' section is highlighted with a red box. It contains the following fields:

- REPORT NAME: Multi Store Weekly
- SUBJECT: Weekly Report
- RECIPIENT EMAIL: admin@supersandwich.com
- REPORT FORMAT: XLSX

Other sections include '2. Type & Timing' and '3. Filters & Layout'.

7. Under **Type & Timing**, click on the **TYPE** dropdown to schedule a **Summary - Single Store**, **Summary - Multi Store**, or **Trends Report**.

The screenshot shows the 'Create New Scheduled Report' form in HME Cloud. The 'Type & Timing' section is highlighted with a red box, showing the 'TYPE' dropdown menu open with the following options:

- Summary - Multi Store
- Summary - Single Store
- Summary - Multi Store
- Trends Report

Other sections include '1. General Information' and '3. Filters & Layout'.

8. a. Choose to **Include** or **Exclude** **PULL-INS** in the report by clicking the corresponding button.
b. Select the **TIME FORMAT** you prefer for the report, either **Minutes: Seconds** or **Seconds** only.
c. Under **TIME MEASURE**, click the dropdown box and select **None**, **Daypart**, **Shift**, or **Hour**

Note: The **TIME MEASURE** section will only appear if you have selected **Summary - Multi Store** as your **TYPE**.

The screenshot shows the 'Create New Scheduled Report' form in HME Cloud. The 'Type & Timing' section is highlighted with a red box, showing the following options:

- PULL-INS: Include (selected), Exclude
- TIME FORMAT: Minutes:Seconds (selected), Seconds
- TIME MEASURE: Daypart (selected)

Other sections include '1. General Information' and '3. Filters & Layout'.

9. Select your desired options under **TIME ZONE**, **RECURRENCE**, and **DAY OF WEEK** dropdowns.

Note: When selecting **Weekly** from the **RECURRENCE** drop-down menu, the **DAY OF WEEK** section determines the period over which the data will be summarized, e.g., if you select Wednesday, the data will be summarized Wednesday-Tuesday.

Note: When selecting **Monthly** from the **RECURRENCE** drop-down menu, the **DAY OF MONTH** section determines the beginning date of the report, e.g. if you choose **Monthly-03** will run on the 3rd day of every month.

The screenshot shows a form with three main sections:

- 1. General Information:** Includes fields for REPORT NAME (Multi Store Weekly), SUBJECT (Weekly Report), RECIPIENT EMAIL (admini@supersandwich.com), and REPORT FORMAT (XLSX).
- 2. Type & Timing:** This section is highlighted with a red box. It contains:
 - TYPE: Summary - Single Store
 - PULL-INS: Include/Exclude buttons
 - TIME FORMAT: Minutes:Seconds/Seconds buttons
 - TIME MEASURE: Daypart
 - TIME ZONE: Select
 - RECURRENCE: Weekly
 - DAY OF WEEK: Select
- 3. Filters & Layout:** Includes STORES (Store Manager (Lauren), Store Manager (Lisa), Store Manager (Paul), 4444-Super Sandwi..., 7658-Super Sandwi..., 7896-Super Sandwi...) and DAYPARTS (Daypart 1, Daypart 2, Daypart 3, Daypart 4).

10. Under **Filters**, click on the **STORE HIERARCHY** arrows to select the desired stores and the **DAYPARTS** you wish to view.

Note: The **DAYPARTS** box will only display when **Daypart** is selected from the **TIME MEASURE** dropdown menu.

The screenshot shows the 'Create New Scheduled Report' form in the HMECLOUD interface. The 'Filters & Layout' section is highlighted with a red box. It contains:

- STORES:** A list of stores with expandable arrows: Store Manager (Lauren), Store Manager (Lisa), Store Manager (Paul), 4444-Super Sandwi..., 7658-Super Sandwi..., and 7896-Super Sandwi... There are 'Select All' and 'Deselect All' buttons.
- DAYPARTS:** A list of dayparts: Daypart 1, Daypart 2, Daypart 3, and Daypart 4.

At the bottom of the form, there are 'Cancel' and 'Save' buttons.

11. Under the Report Layout box, you will find **STORE HIERARCHY GROUP** dropdown. If you would like to group available Stores by level, select a Hierarchy Level from the dropdown options.

Note: The **STORE HIERARCHY LEVEL** section will only appear if you have selected **Summary - Multi Store** as your **TYPE**.

12. Click **Save**.

Create New Scheduled Report

1. General Information

REPORT NAME: Multi Store Weekly

SUBJECT: Weekly report

RECIPIENT EMAIL: admin@supersandwich.com

REPORT FORMAT: XLSX

2. Type & Timing

TYPE: Summary - Multi Store

PULL-INS: Include / Exclude

TIME FORMAT: Minutes:Seconds / Seconds

TIME MEASURE: Daypart

TIME ZONE: (GMT-08:00) Pacific Ti...

3. Filters

STORE HIERARCHY

- NEWTERE
 - 8010-Best Burger #43
 - Regional T
 - shopping_center 1
 - 557799-EDWIN01

DAYPARTS: Select All | Deselect All

4. Report Layout

STORE HIERARCHY GROUP: 1st Level

All
1st Level
2nd Level
3rd Level
4th Level

Cancel Save

13. On the Scheduled Reports page, click **Remove** or **View/Edit** under ACTIONS to Remove, View, or Edit a pre-existing Scheduled Report.

WELCOME DASHBOARD **REPORTS** LEADERBOARDS SETTINGS SMACK TALK Logged in

User Guide Create New Schedule

REPORT NAME	COMPLEMENT	TIMEZONE	FORMAT	ACTIONS
ly	Monthly-02	(GMT+00:00) Dublin, Edinburgh, Lisbon, London	PDF	Remove View/Edit
y	Tuesday	(GMT+06:00) Astana	PDF	Remove View/Edit
		(GMT+11:00) Magadan	PDF	Remove View/Edit

For help, call 800.848.4468 (options 1,2, and 3) or email: support@hme.com

5 of 5

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