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Navigating and Generating
Reports in the HME CLOUD®
Reporting System
User Guide

CONTENTS

> **NOTE:** *The Drive Off Summary Report is only available for stores using ZOOM® Nitro Vision AI*
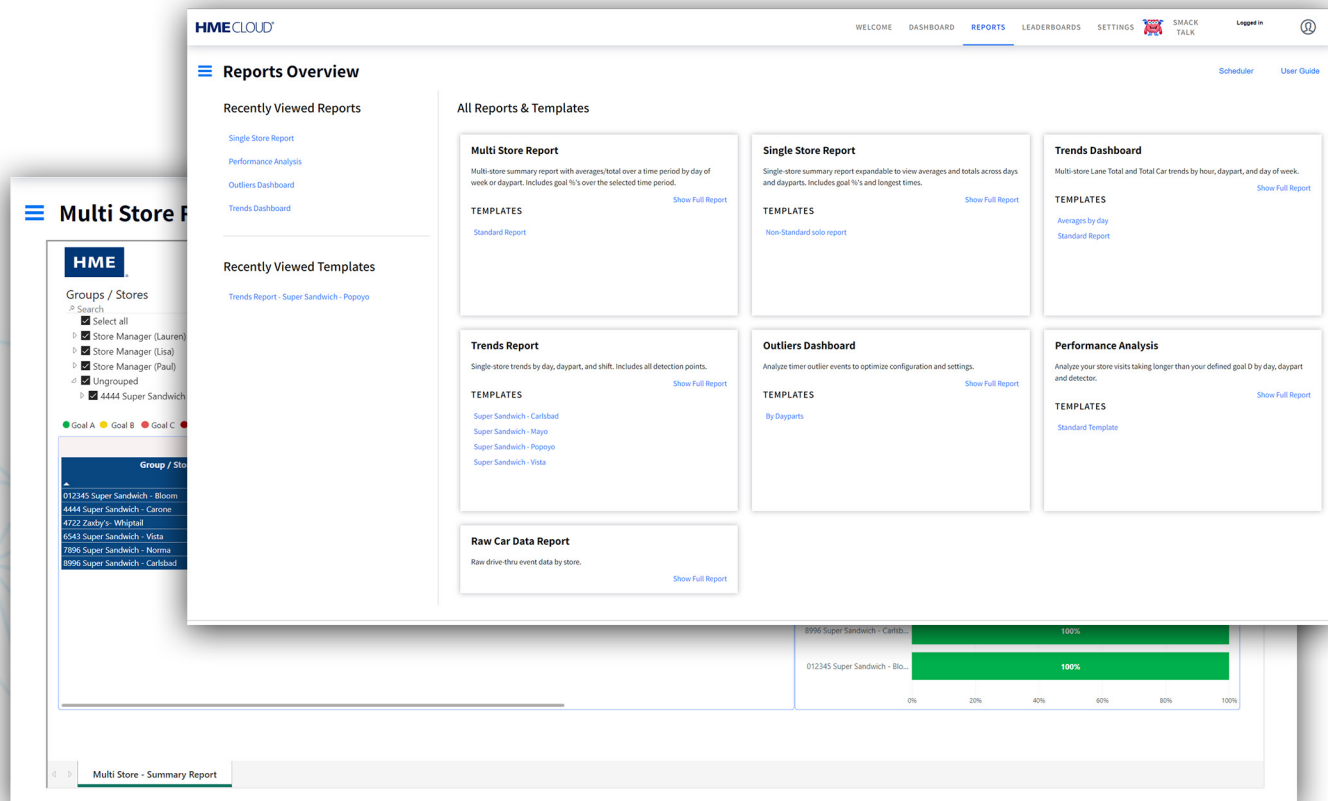
Locating the Reports Page in HME CLOUD

1. Log into your HME CLOUD account.
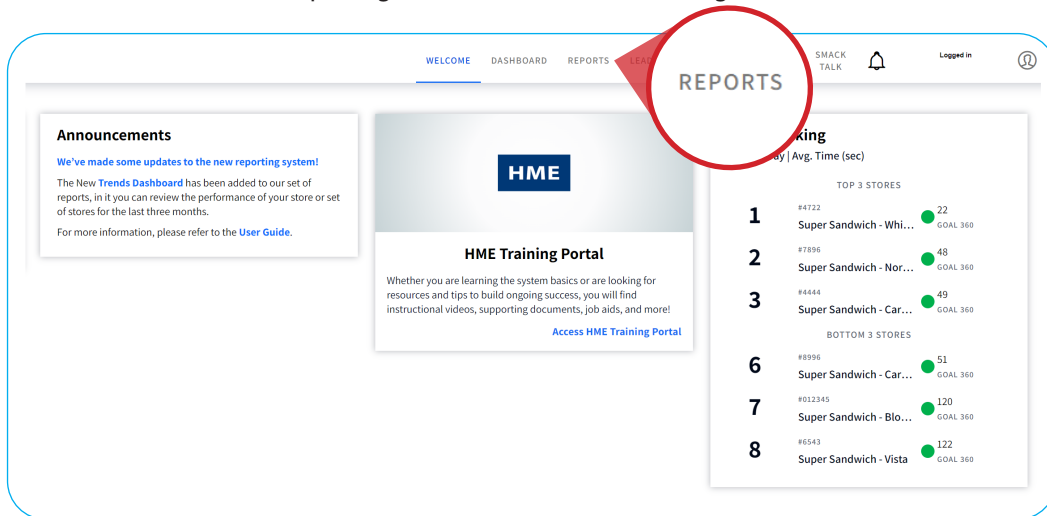2. Click/tap the **REPORTS** tab on the top navigation bar of the **WELCOME** Page.

Fig. 1

Drive Off Summary Report

3. You will be taken to the **Reports Overview** page.

Choose from **All Reports & Templates** for the type of Report you would like to see. You can select: **Multi Store**, **Single Store**, **Trends Dashboard**, **Trends Report**, **Outliers Dashboard**, **Performance Analysis**, or **Raw Car Data**.

Note: The Reports setup page layout is the same for all Report types.
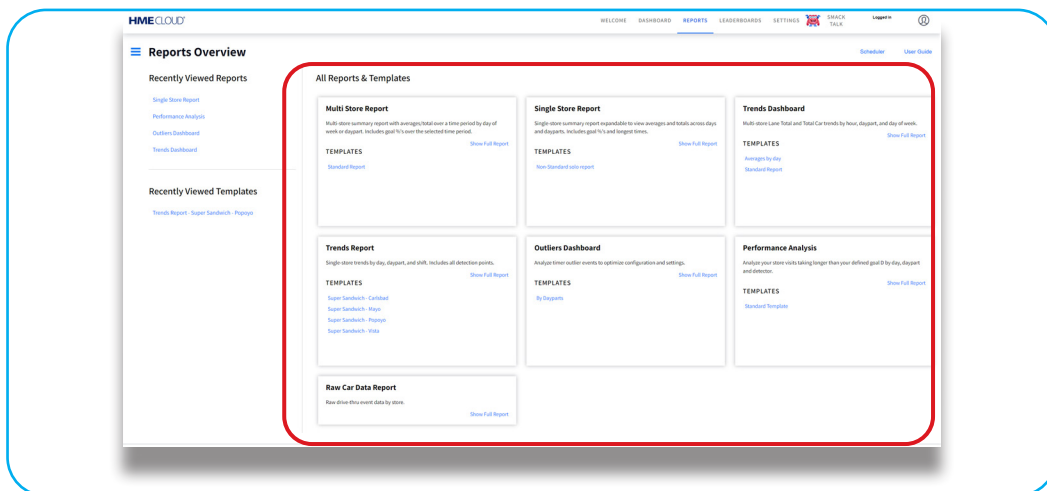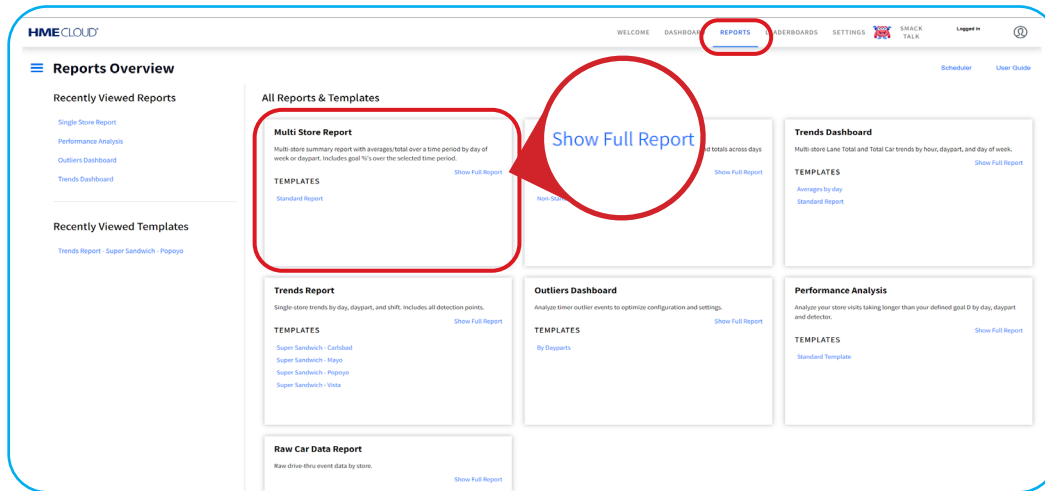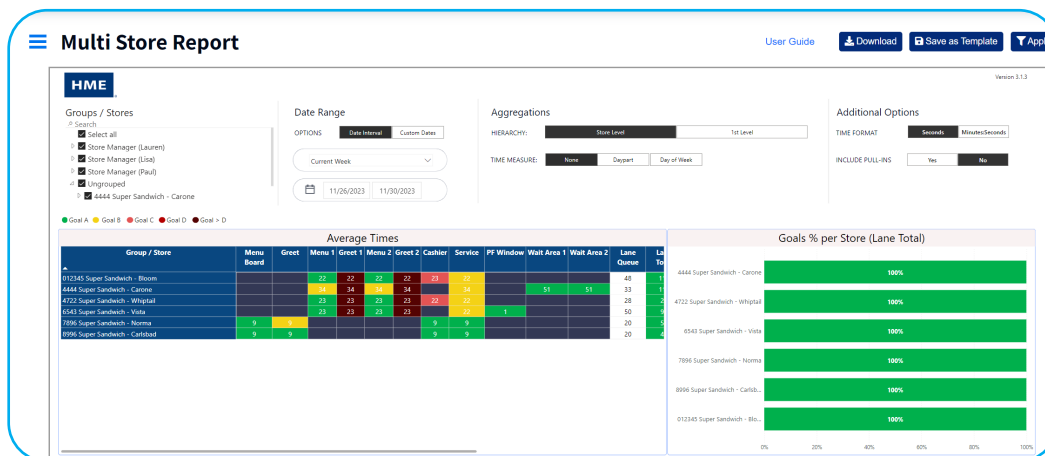

Fig. 2


Multi Store Report

1. Navigate to the **Reports Overview** page.

2. Select **Show Full Report** from the **Multi Store Report** box.

3. You will be taken to the **Multi Store Report** page.

4. The top section contains **Search & Filter** options you can edit to customize your Reports.

5. Select which **Group(s)** or **Store(s)** you would like to include in your Report by clicking on the checkbox next to your desired store, or by typing the name of a store into the **Search bar**.
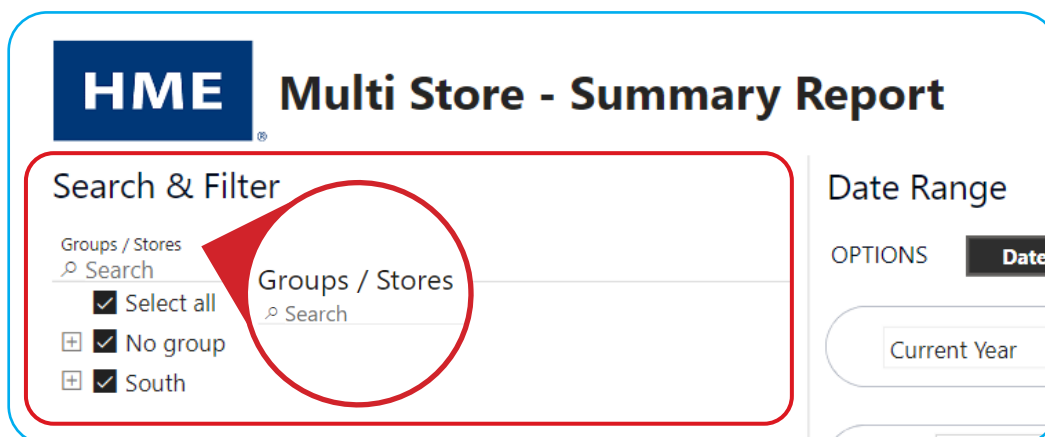
6. Select your desired **Date Range** of your Report by clicking the dropdown arrow under arrow under **Current Week**, any of the other options in the dropdown, or entering your own **Custom Dates**.

7. Under **Aggregations**, select your **HIERARCHY**, **TIME MEASURE**, and **TOGGLE VIEW** options.**Note:** The **HIERARCY Levels** represent your company's orginizational structure and are set using the **SETTINGS** tab of the HME Cloud Welcome page.
    TIME MEASURE changes the first column of the report between **Group / Store, Day of Week**, or **Daypart**.
    TOGGLE VIEW will only appear if you have selected **Daypart o**r **Day of Week** next to **TIME MEASURE.**
    TOGGLE VIEW changes the view of the **Average Times tabl**e to display by **Group / Store, Day of Week,** or **Daypart**.

8. Determine your **Additional Options** by selecting your desired preferences.

9. Your Report will reflect the preferences you selected from the **Aggregations** section.

10. Click the **checkbox** on the left side of the page to display the **Day**(s) or **Daypart**(s) you wish to view.
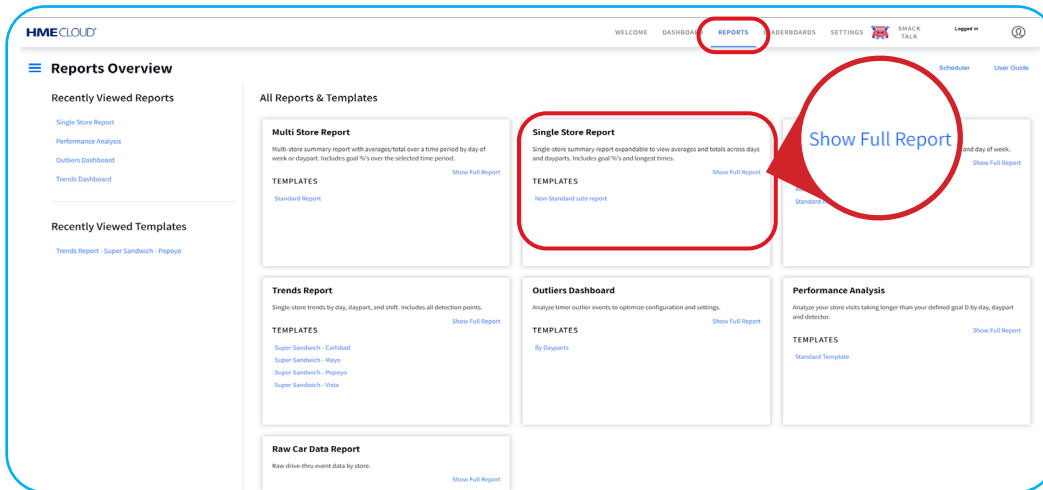

11. The **Goals %** chart to the right of your Report shows how well your store did at meeting its configured goals.**Note:** Hover over **Goals % per Store** graph to view individual goals.

Single Store Report
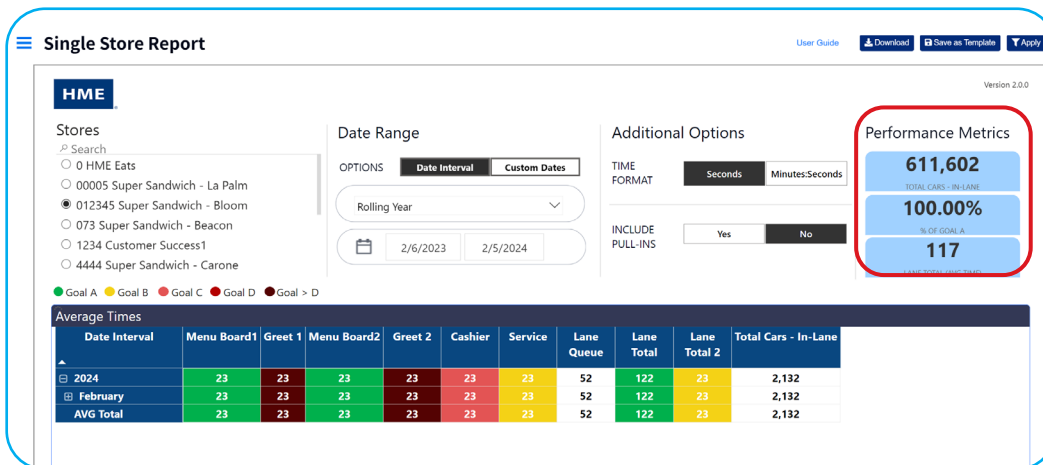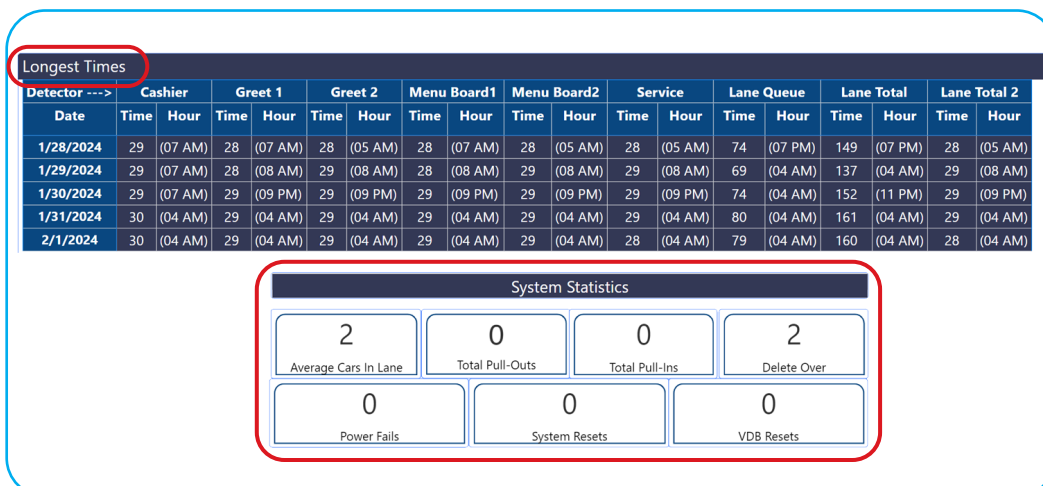
1. Navigate to the **Reports Overview** page.

2. Select **Show Full Report** from the **Single Store Report** box.

3. The Single Store Report will look almost identical to your Multi Store Report, but will include a **Summary** above the Report.
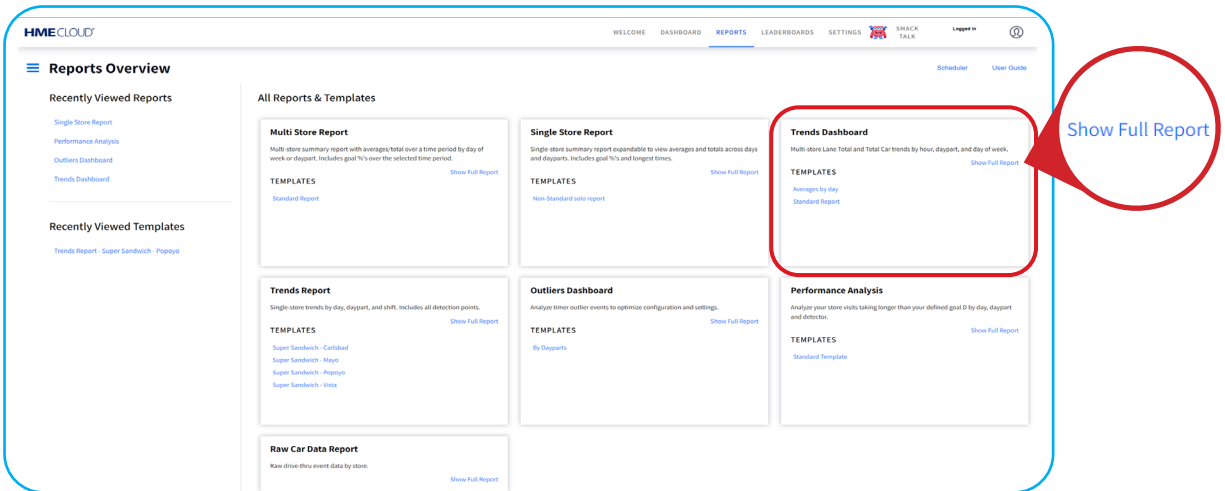

4. At the bottom right of the page, you can view the **Longest Times** your store had at each detection point and **System Statistics** displays an overall view of your Timer's key performance indicators.
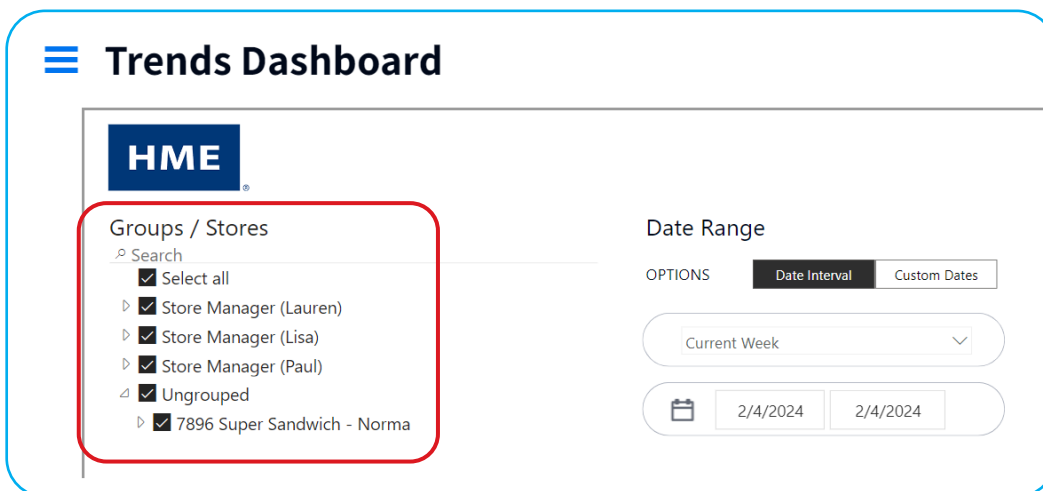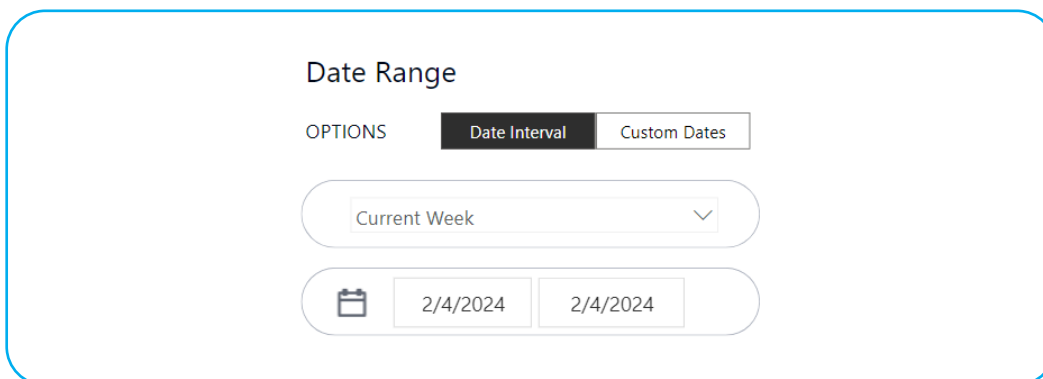
Trends Dashboard

1. Navigate to the **Reports Overview** page.

2. Select **Show Full Report** from the **Trends Dashboard** box.

3. Select which **Group(s)** and **Store(s)** you would like to include in your Report by clicking the appropriate boxes or by typing the name of a store into the **Search bar**.

4. Select your desired **Date Range** by **Date Interval** or **Custom Dates**. Select the date range from the dropdown or enter your custom dates.

5. Under **Aggregations**, select your **HIERARCHY** and criteria for **AVERAGE TIME**.
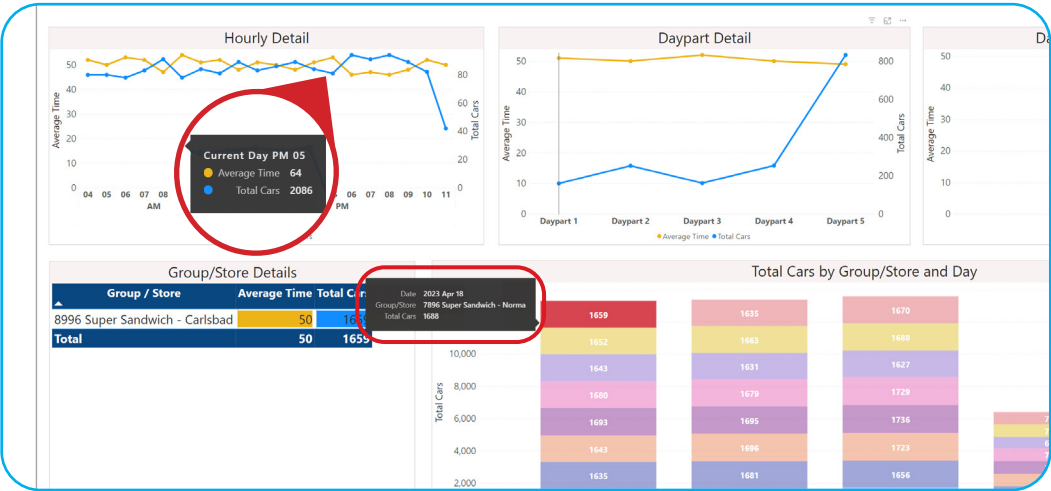

6. Your **Trends Dashboard** will display the number of cars served and average time by the Hour, Daypart, Day of the Week, and Group / Store.


7. Hovering above items in the charts will reveal the details of the column. Clicking on a graph will change the other charts to show the selected information in more detail.

8. **Group/Store Details** displays the average time and total cars in the drive through for the specified date range.


Group/Store Details		
Group / Store	**Average Time**	**Total Cars**
012345 Super Sandwich - Bloom	121	1631
1234 Customer Success1	43	1806
4444 Super Sandwich - Carone	123	1647
4722 Zaxby's- Whiptail	23	1258
6543 Super Sandwich - Vista	97	1678
7896 Super Sandwich - Norma	49	1674
8996 Super Sandwich - Carlsbad	49	1671
Total	**73**	**11365**

9. **Total Cars by Store and Day** shows the number of cars per store within your selected date range.
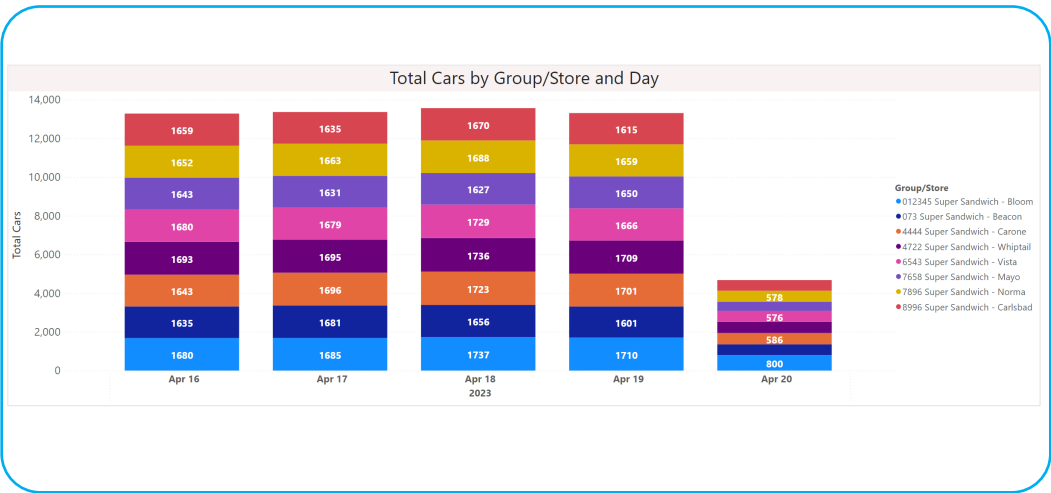
Trends Report

1. Navigate to the **Reports Overview** page.

2. Select **Show Full Report** from the **Trends Report** box.
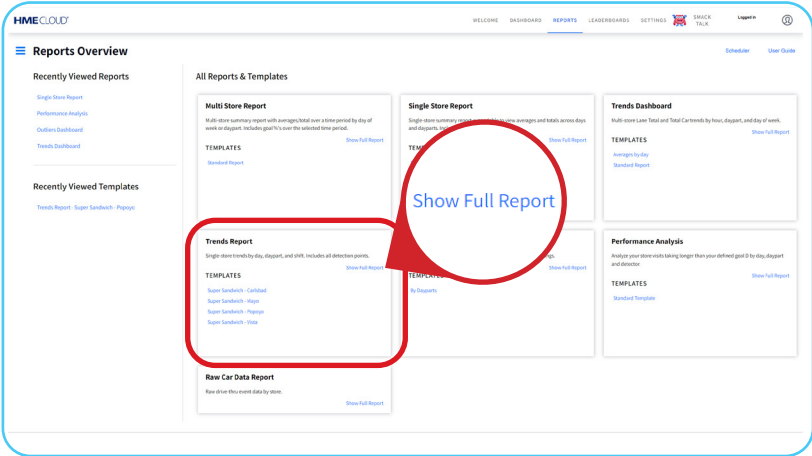
3. The Single Day Trend Analysis Report will look almost identical to your Single & Multi Store Reports, but will include additional options regarding the selected time intervals, such as **Daypart** and **Shift**.

4. Your Single Day Trend Analysis Report will now reflect the preferences you selected.

5. To view your Multi Day Trend Analysis Report, select **Multi Day** under the **Set Options** section.

6. The Multi Day Trend Analysis Report will look almost identical to your Single Day Trend Analysis Report, but will include additional options regarding the selected time intervals, such as **Report Date Range**.

7. Your Multi Day Trend Analysis Report will now reflect the preferences you selected.

Outliers Dashboard

1. Navigate to the **Reports Overview** page.

2. Select **Show Full Report** from the **Outliers Dashboard box**

Note: Outliers are irregular events captured by the timer system.

The **Outliers** tracked for reporting are:

- Pull-ins
- Pull-Outs
- Max Over Delete
- Discards
- Manual Deletes
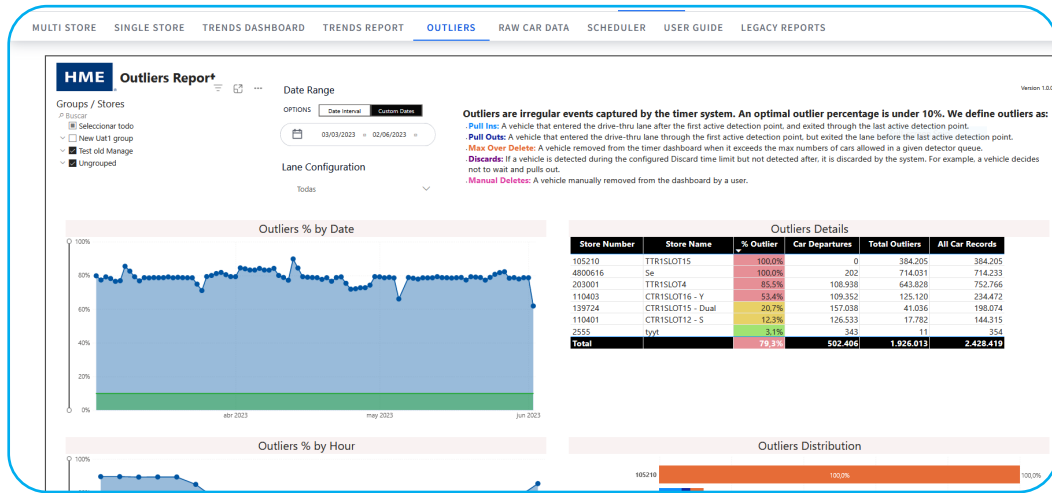
3. Select the **Groups / Stores** and **Date Range** the for the report.

   Note: Hover over data points for detailed information.
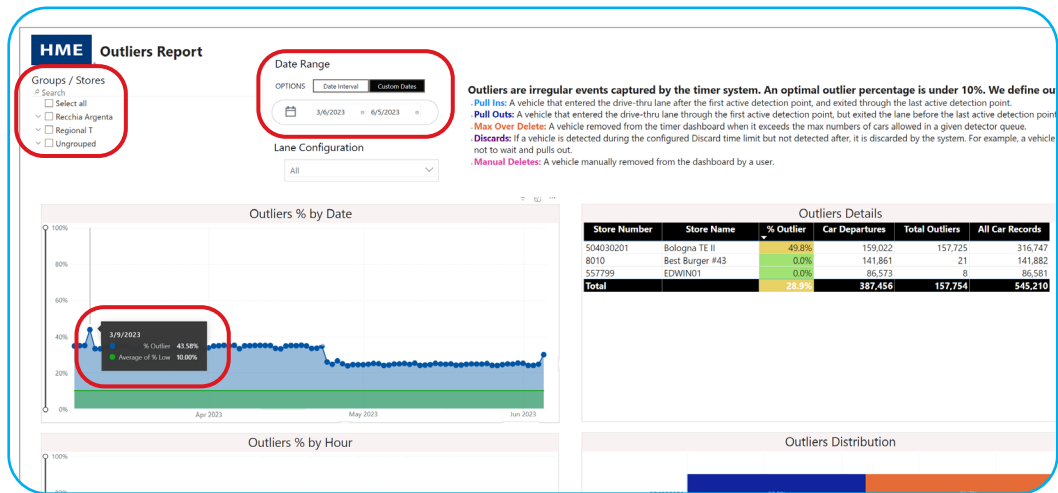
4. Four windows will display information about the store's outliers.

- Outliers Percentage by date
- Outliers Details
- Outliers Percentage per hour
- Outliers Distribution

Note: The green line at the bottom of the Percentages windows represents 10%, which is considered the acceptable threshold for Outliers.

Performance Analysis

1. Log on to the to your HME CLOUD account.

2. Click on **Reports**.

3. Select **Show Full Report** from the **Performance Analysis** box.

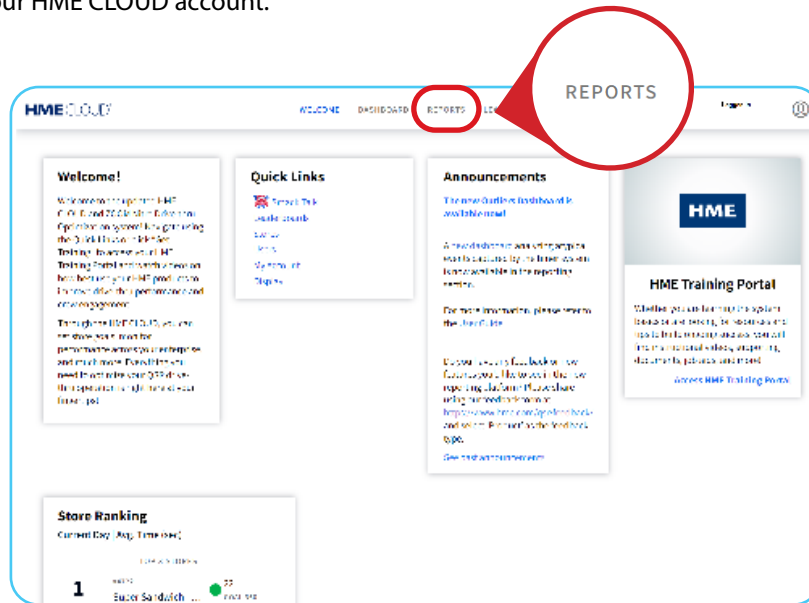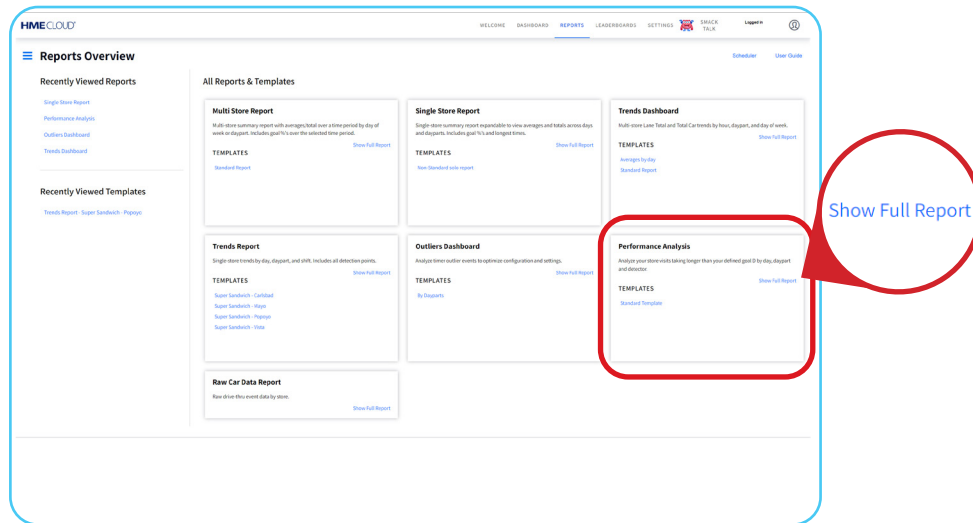Show Full Report

4. Select the store(s) to add to the report from the **Groups / Stores** box in the upper-left corner of the screen.
    Note: Stores may be selected individually or as a group. Selecting multiple stores will display data based on the store with the highest threshold.

5. Select the **Lane Configuration**(s).
6. Select the **Daypart**(s).
7. Select the date range for the report you'd like to create or select an existing range from the drop-down menu in the
    Date Range section.
    Note: To save your selection for future use, click on Save as Template in the upper-right corner.
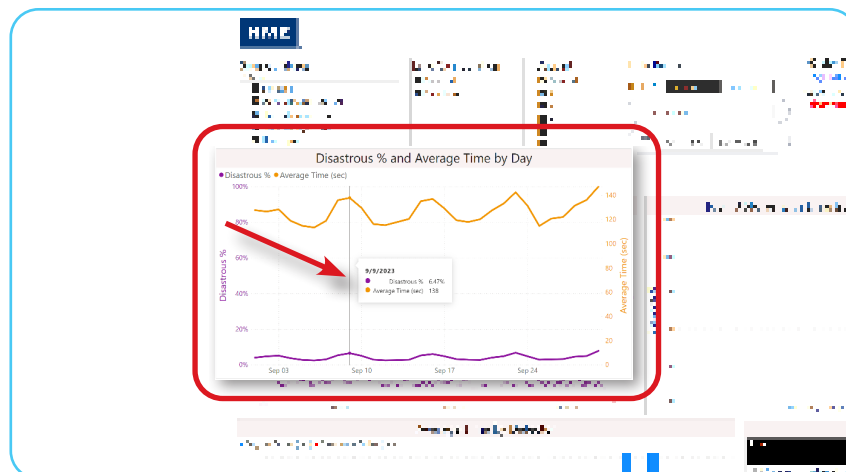   Enter a name for the template and then click Save.
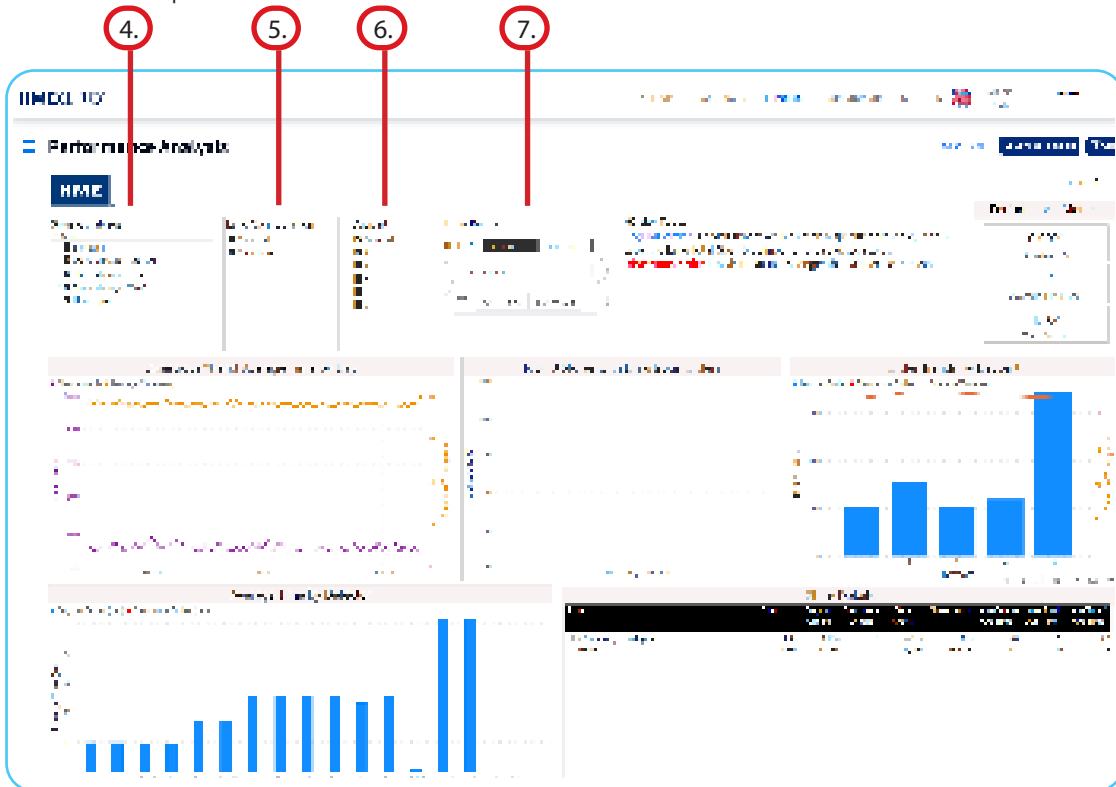
- To set the threshold for determining Disasterous Orders...

- The average of all stores is displayed on the graphs below unless only one store is selected. This report is responsive and will change the data displayed, based on the specific areas that you are interested in.

- Whenever you want to drill down on the information displayed, click on the data in the chart. For example, if you want to know more detail, click on the data displayed, and the report will reorganize the data based on your interaction.
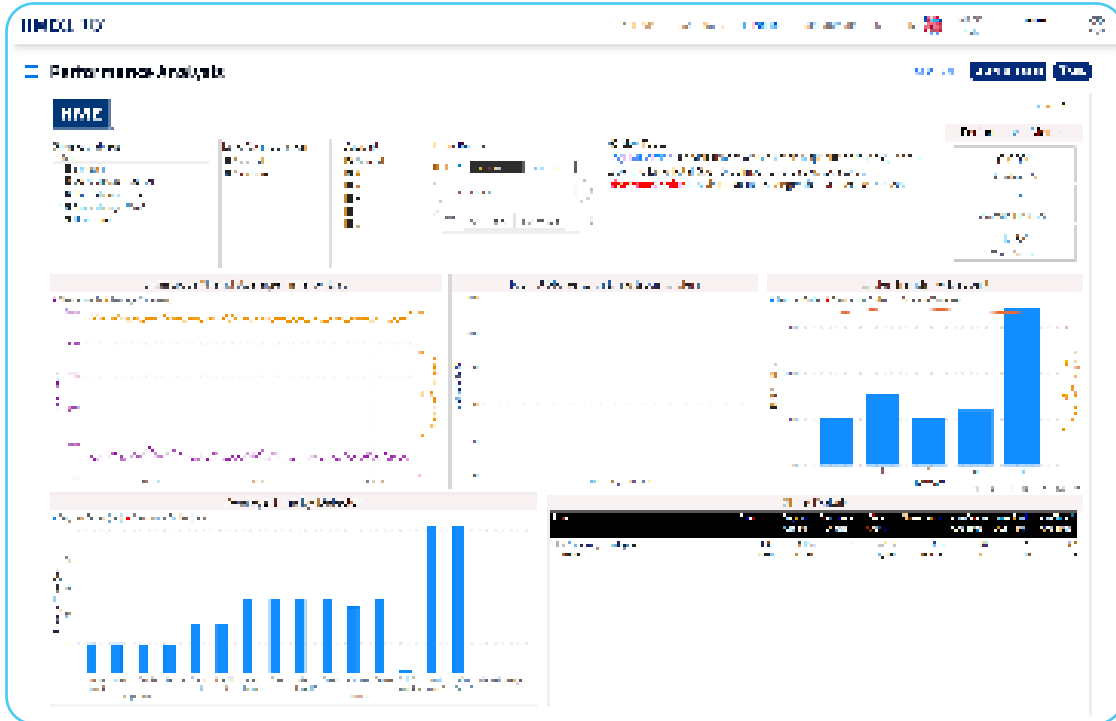

- The **Disastrous % and Average Time by Day** line graph shows the trends of both the average and the disastrous order times for comparison. The purple line shows how your average disastrous order times compare to the average time of regular orders shown here by the yellow line.

> **Note:** Hovering over any point in the graph will reveal the precise metrics and correlation for individual days. Clicking on a day's pop-up will change the other graphs on the page to reflect the information for that day.

- The 10 Stores with the higest disastrous orders graph shows you which stores in your group need to focus their attention on the disastrous orders.
 **Note:** To spot where an individual store is experiencing the most Disastrous Orders click on the bar for the store in the Top 10 Stores with Disastrous Orders bar graph. If your organization has more than 10 restaurants on your HME CLOUD account, only the 10 stores with the highest Disastrous Order time in your group will be displayed on the report.
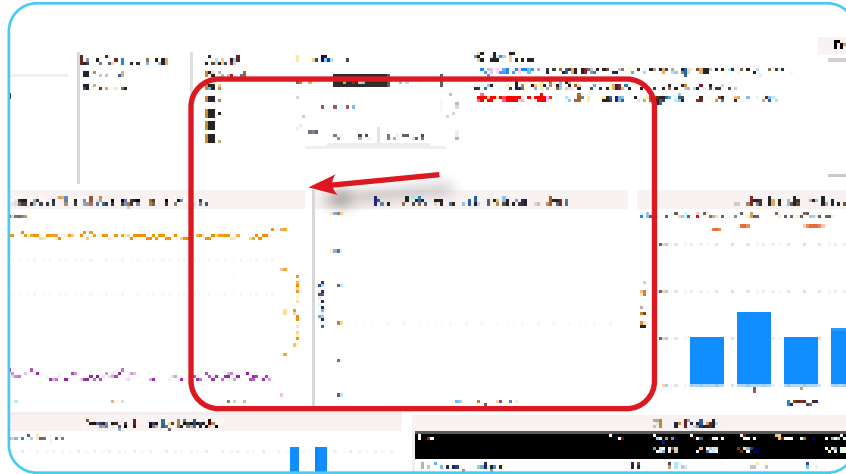
- The **Order Trends by Daypart** window displays the ratio of regular to disastrous orders separated by daypart in both a bar chart and trend line. This allows users to see exactly when slowdowns occur.

- The **Average Time by Detector** graph pinpoints the bottlenecks in your drive-thru process step-by-step. This helps identify the location in your drive-thru where the most delays occur.
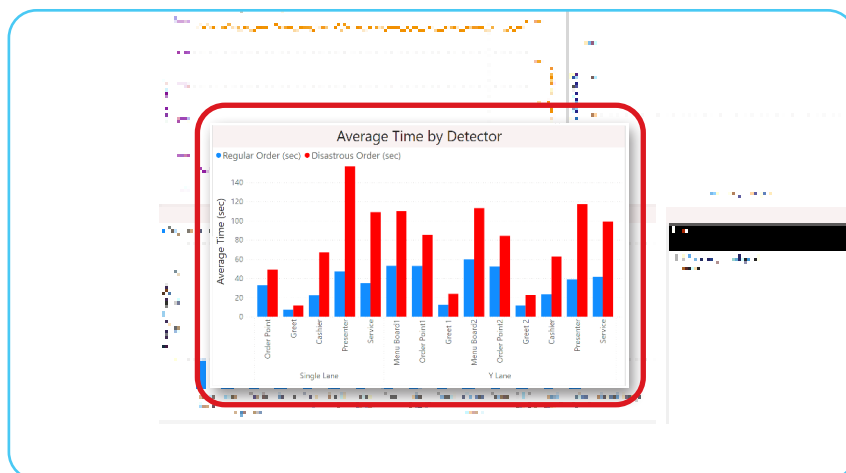
- The **Store Details page** offers a deep dive into the current store(s) data by date or daypart.   Key information is organized into Regular Orders, Disastrous Orders, Total Orders, the percentage of   Disastrous Orders, and average time per order.
  Note: Data from each table of the page may be exported individually as an Excel or CSV file or viewed individually as a table by clicking on the ellipsis in the top right corner of the box.

Saving a Report Template

1. Once you have input your Report preferences for **Multi Store**, **Single Store**, or **Trends Reports**, you may click **Save as Template** to name and save the Report Template.

2. To access and existing template, click **Apply** and select your desired Report Template.

3. New and previously created templates will also be available on the Reports Overview page.

Raw Car Data Report

1. Navigate to the **Reports Overview** page.

2. Select **Show Full Report** from the **Raw Car Data Report** box.
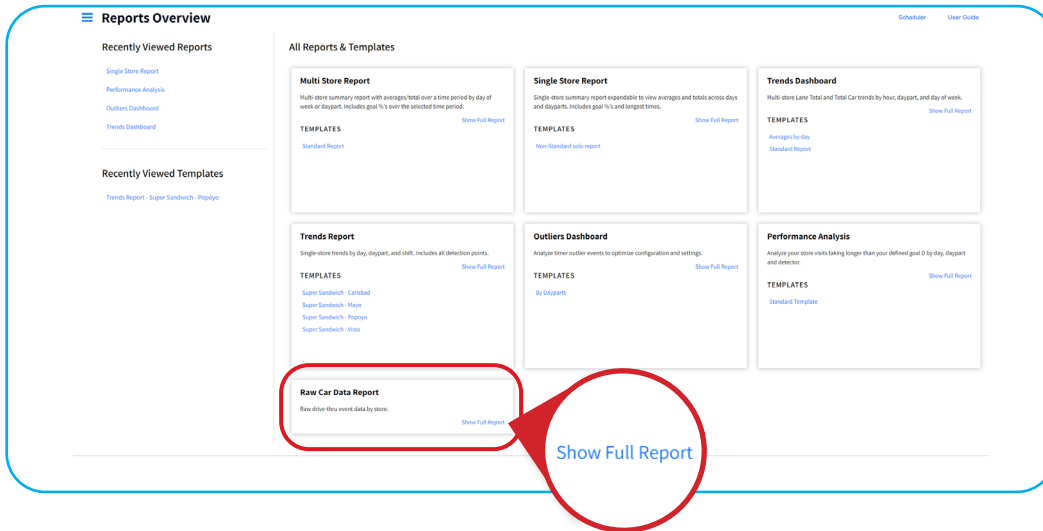
3. Select the desired preferences of your Report by typing data into each box, or clicking the dropdown arrows to the right of each box.
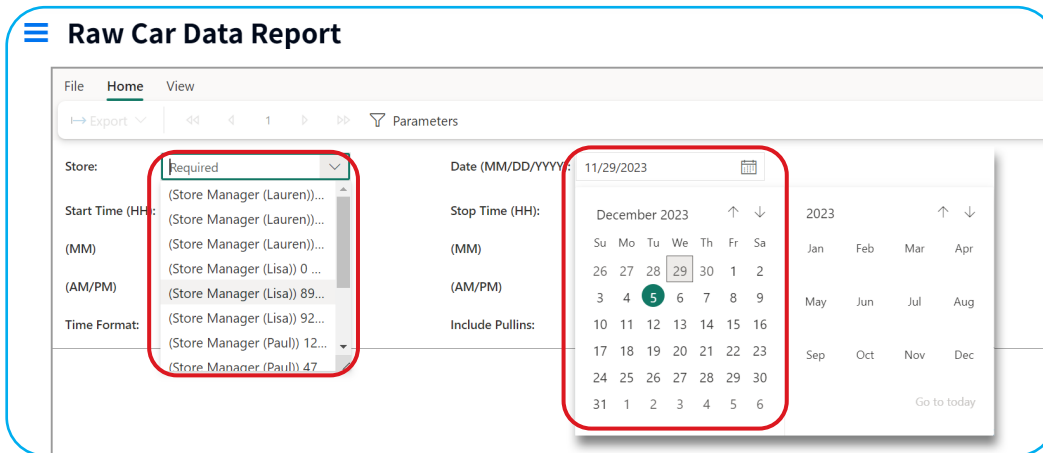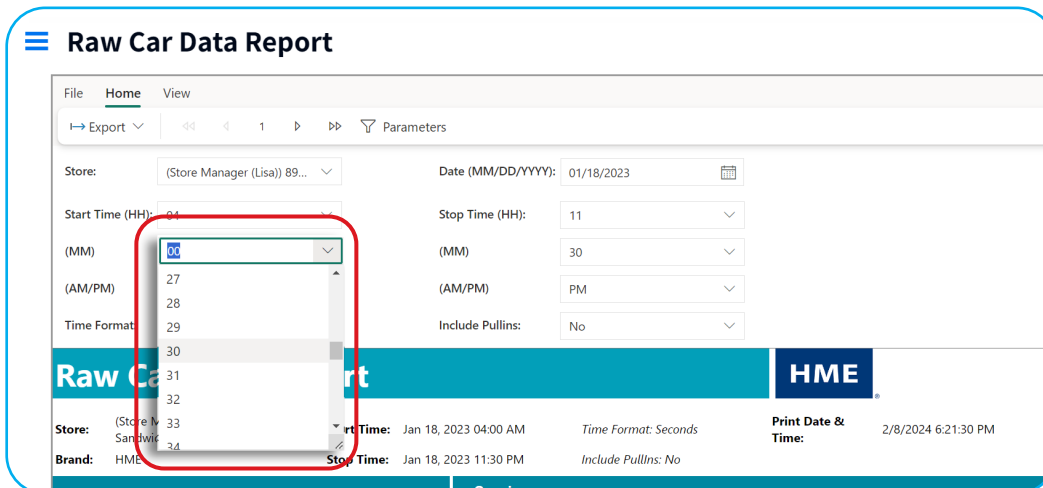

4. Select the **Start Time** and **Stop Time** of the report, using the hour **(HH)** and minute **(MM)** drop-downs.

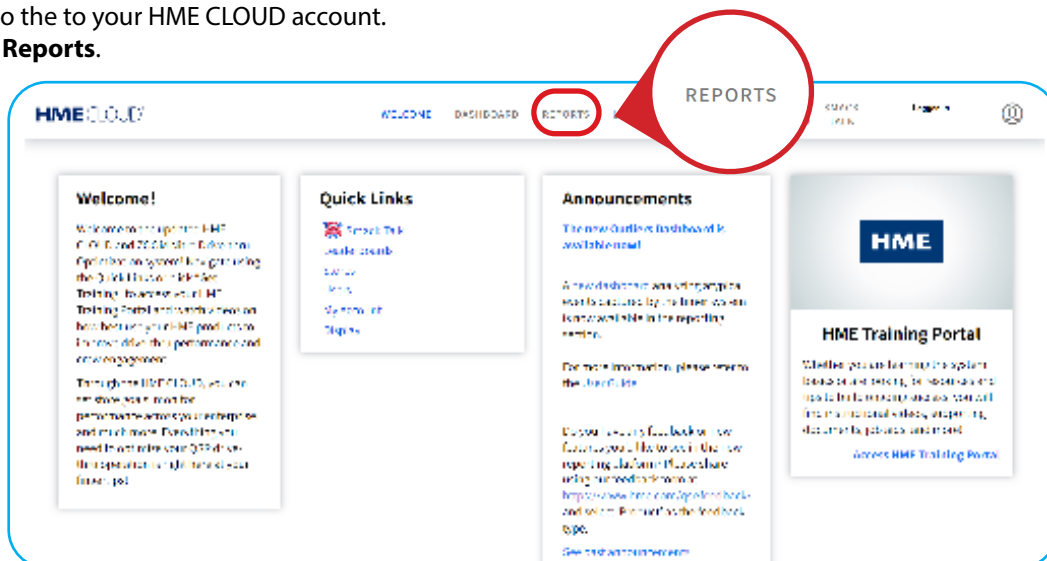5. When you are done, click **View report** at the far right of the page.

6. Your Raw Car Data Report will now reflect the preferences you selected. **Note:** Only 30 events are listed per page of the report. To view the enitre time period, click the arrows in the top-left area of the report to navigate all pages of the 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.
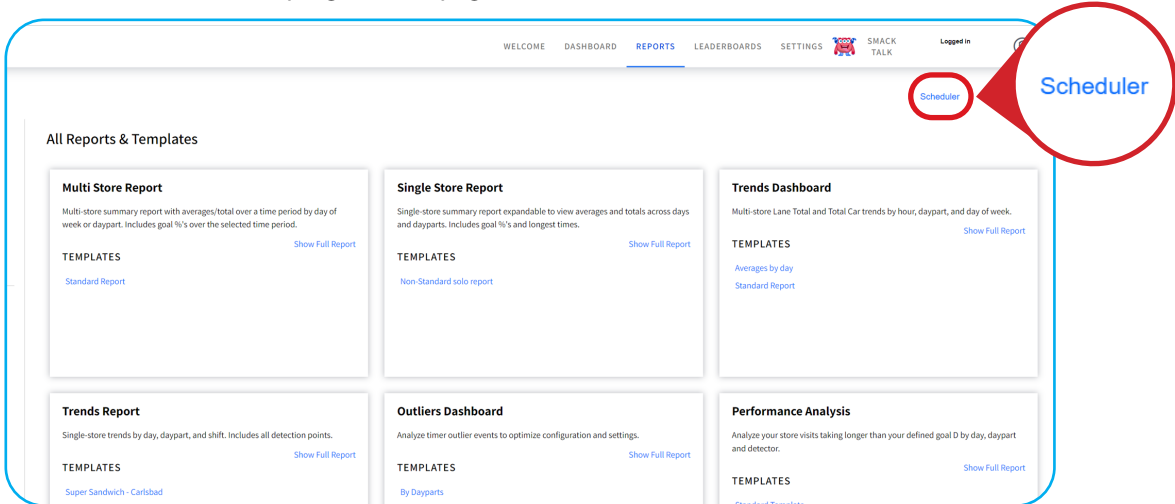
5. Click on **Create New Schedule** to create schedule from scratch.
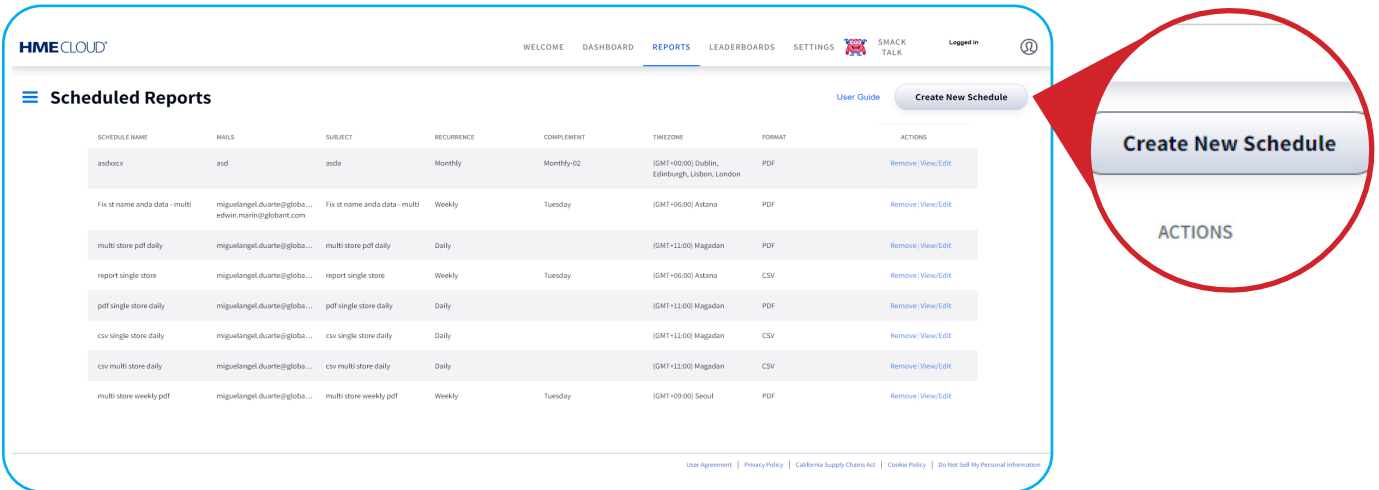
6. Input the Scheduled Report information under **General Information**, including **REPORT NAME**, **SUBJECT**, **RE-CIPIENT EMAIL**, and **REPORT FORMAT**. **Note:** More than one emaill address may be added.

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

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**.

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.

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.

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**.

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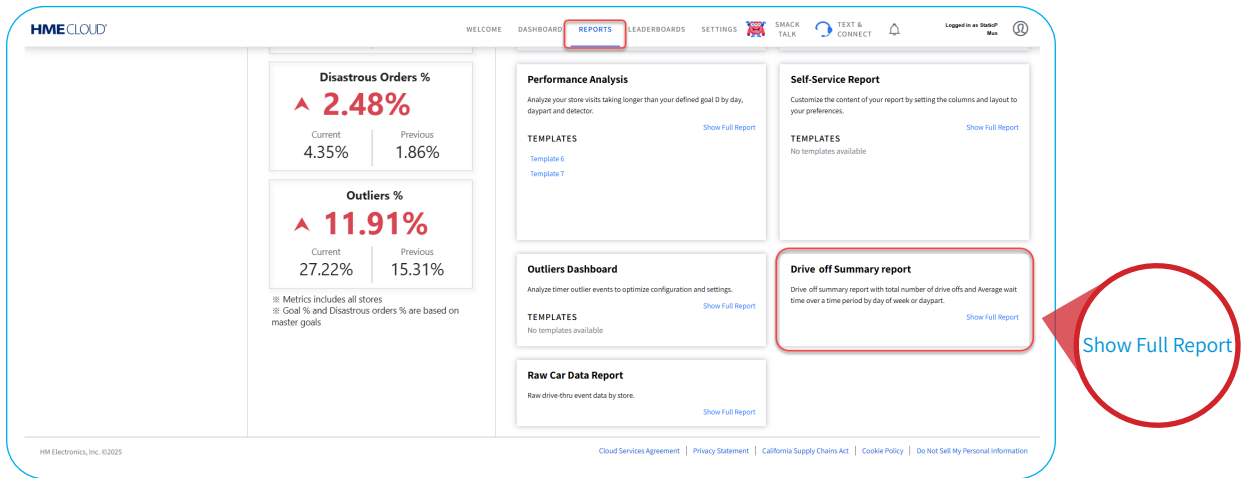
Drive Off Summary Report

1. The Drive Off Summary Report appears at the lower-right side of the page. In this pane, click/tap on "Show Full Report" to expand this option.

2. This opens a page with three panes.
   - **Average Drive offs:** The top-left graph shows the number of Drive Offs per store.
   - **Average menu stack Queue Lenght at time of Drive off:** The top-right graph uses the total number of cars in the menu stack at the time of a drive off and calculates an average based on that count.
   - **Average wait time prior to Drive off by Store:** The bottom-left table shows the average time cars spent waiting in the menu stack before driving off.

The filter button in the upper right lets you customize your Report by filtering or editing the data you want to see on the page.
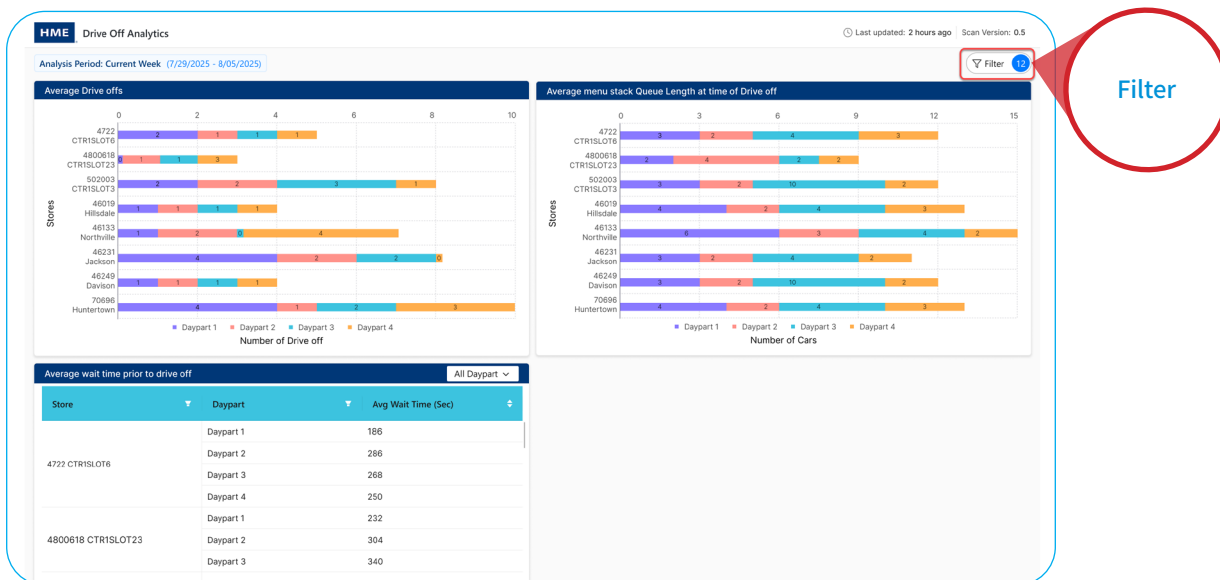
3. Select which **Groups** / **Stores** you would like to include in your Report by clicking/tapping on the checkbox next to your desired store, or by typing the name of a store into the **Search** field.
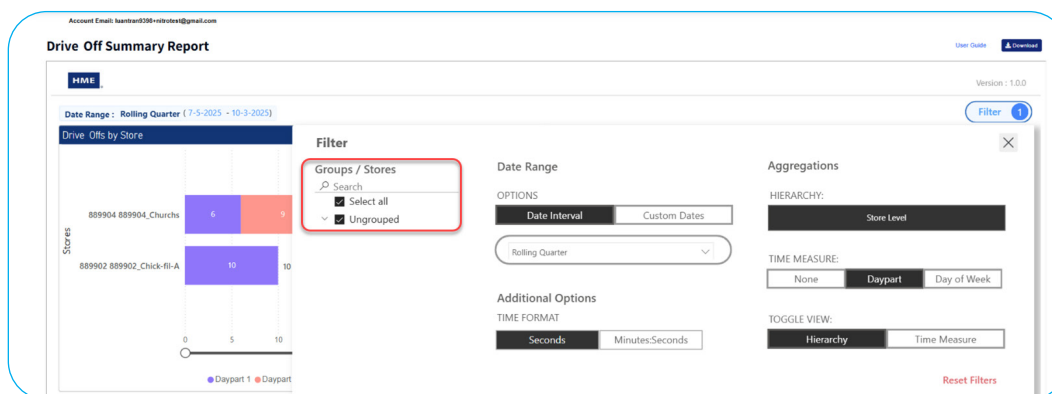
4. Select your desired Date Range of your Report by clicking the dropdown arrow under **Rolling Quarter**, any of the other options in the dropdown list, or by entering your own Custom Dates.
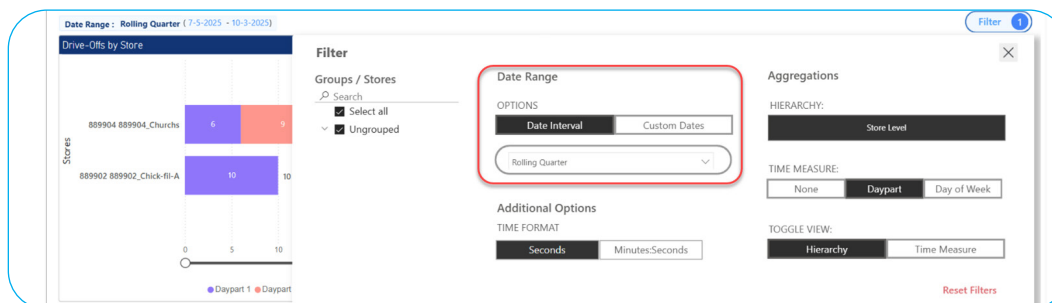
5. Under **Aggregations**, select your **HIERARCHY**, **TIME MEASURE**, and **TOGGLE VIEW** options.
   - **HIERARCHY:** These are levels that represent your company's organizational structure and are set under the **SET-TINGS** tab of the **WELCOME** page (the landing page after you log in to the HME CLOUD).
   - **TIME MEASURE:** This changes the first column of the Report to **Group / Store**, **Day of Week**, or **Daypart**.
   - **TOGGLE VIEW:** This changes the view of the **Average Times** table to display by **Group / Store**, **Day of Week**, or **Daypart** (This view is only visible if you have selected **Day of Week** or **Daypart** under **TIME MEASURE**).
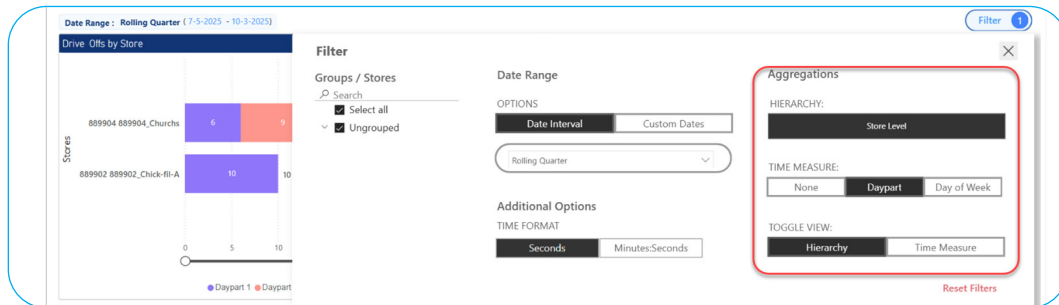

6. **Additional Options:** Allows you to select your preferred options.
   - Time Format: The default is Seconds, but click/tap on Minutes:Seconds to switch to this format.
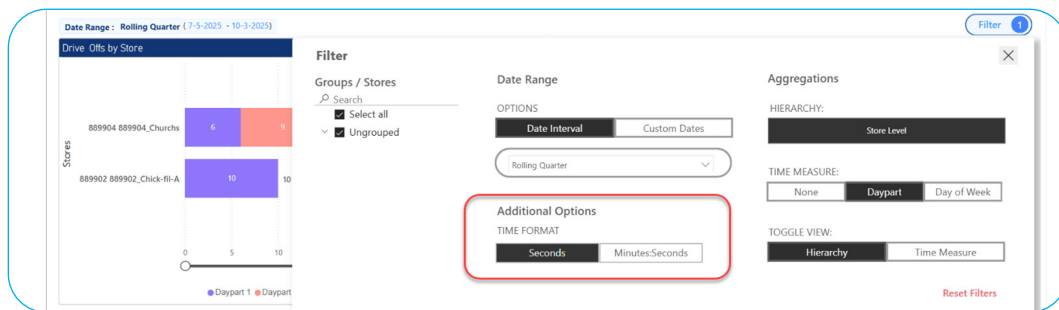
7. Your Report will reflect the preferences you configured in the Filter dialog.
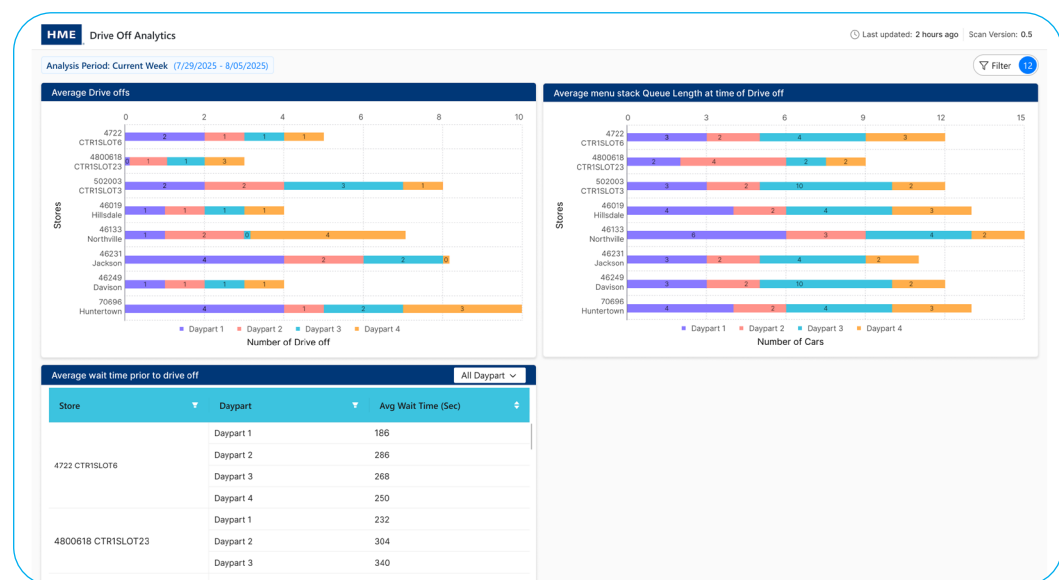
8. Click/tap the **Reset Filters** text (Fig. 10) to clear your preferences and restore the filter to its default settings.

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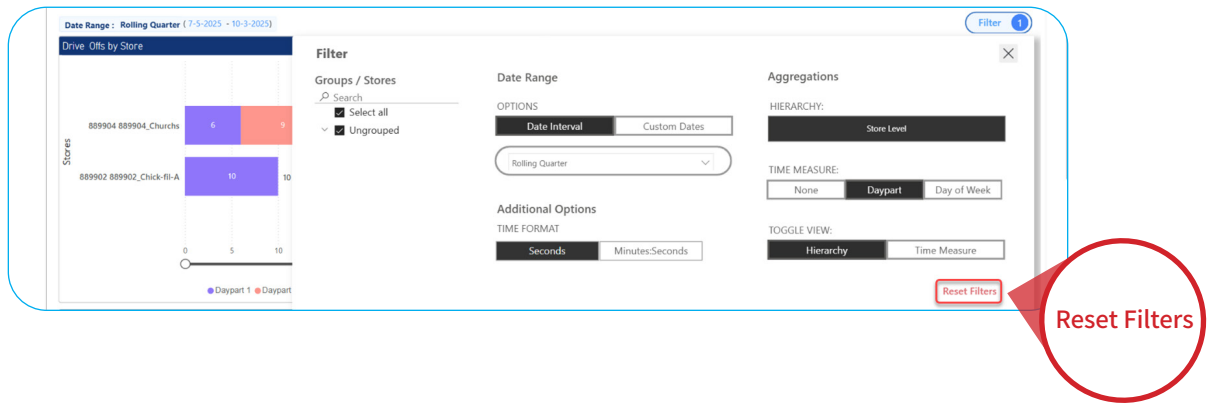
For help, call 800.848.4468 (options 1,2, and 3) or email: support@hme.com

For more information
visit the **HME User Manuals page** at:
https://www.hme.com/qsr/support/drive-thru-user-manuals/

Also, visit the **HME Training Portal** at:
https://www.hme.com/training