

**Oracle® Hospitality Reporting and Analytics
Advanced**

User Guide

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Getting Started

Oracle Hospitality Reporting and Analytics Advanced is a web-based solution that consolidates food and beverage information in the cloud. Oracle Hospitality Reporting and Analytics Advanced centralizes point-of-sale (POS) data to provide operational and analytical insights into the business, improving efficiency by delivering information to all roles within the business.

Report Types

Report Types

Oracle Hospitality Reporting and Analytics Advanced provides standard reports. A standard report is pre-configured to retrieve data on a specific aspect of business operations.

You can use iQuery and Interactive Reports to build custom reports. iQuery is a Microsoft Excel add-in that enables you to build queries in Microsoft Excel and work with the results in a spreadsheet. Interactive Reports is a tool that enables you to build custom reports and view them in real time. Use custom reports to track data on sales, profit, operating expenses, and other performance measurements. Compare the custom report data with data in other reports such as standard reports to make business decisions for your organization.

Running Reports

Oracle Hospitality Reporting and Analytics Advanced enables you to run standard reports or modify and then run standard reports. When you modify a standard report, you apply filters by defining date ranges, locations, revenue centers, and order types. After you run a report, you can export it to an Adobe PDF, Microsoft Excel, or comma-separated file.

[Running Standard Reports](#)

[Modifying Standard Reports](#)

[Exporting Reports](#)

Running Standard Reports

1. In the side menu on the Reporting and Analytics home page, click **Reports** and then click **More Reports**.
2. In the Reports list, click the report name and then click the specific report.
3. Click **Run Report**.

Related Topics:

[Reporting on Summary Information](#)

Related Topics:

[Reporting on Daily Detail Information](#)

Related Topics:

[Reporting on Current Business Day Information](#)

Related Topics:

[Reporting on Key Performance Indicators](#)

Related Topics:

[Reporting on Employee Information](#)

Modifying Standard Reports

1. In the side menu on the Reporting and Analytics home page, click **Reports** and then click **More Reports**.
2. In the Reports list, click the report name and then click the specific report.
3. On the **Modify Report** tab, modify the report as described in the following table:

Setting	Description
Business Dates	Select the date or date range for the report. To select dates from the calendar view, select Please Select from the drop-down list. Select dates as follows: <ul style="list-style-type: none"> • Click a single day. • Click the month name to select all the days in the month. • Click the day column header to select all those days in the month. • Click the numbered week to select all the days in that week. • Press and hold the Ctrl key to select multiple days.
Locations	Select the locations for which the report returns data.
Revenue Centers	Select the revenue centers for which the report returns data.
Order Types	Select the order types for which the report returns data.

4. On the **Preferences** tab, specify how Reporting and Analytics saves reports as described in the following table:

Option	Description
Save	When you select the report from the Reporting and Analytics home page side menu, the report runs with the settings you selected in step 3.
Restore defaults	Removes previously saved report settings.
Save as	Saves the report with the settings you selected in step 3 as a custom report in the Other Reports portlet.

5. On the **Favorite** tab, specify favorite settings as described in the following table:

Setting	Description
Set as Favorite	Makes the report easier to access. Reporting and Analytics adds a star next to the report name and adds it to the Reports section of the home page side menu.
Set as Home Report	The report opens after you log in to Reporting and Analytics.
Enable Auto Run	Controls if the report runs after you click the report. If you turn off this setting, you have to click Run Report every time you want to run the report.

6. Click Run Report.

Related Topics:

[Reporting on Summary Information](#)

Related Topics:

[Reporting on Daily Detail Information](#)

Related Topics:

[Reporting on Current Business Day Information](#)

Related Topics:

[Reporting on Key Performance Indicators](#)

Related Topics:

[Reporting on Employee Information](#)

Exporting Reports

1. Run a standard report or modify and then run a standard report.
2. Click the export format icon next to the **Favorites** tab.
3. Save the exported file to your computer.

Reporting on Summary Information

The following reports provide consolidated summary views of historical and current operations data:

- [Daily Operations Report](#)
- [Day Part Sales Summary Report](#)
- [Day Part Operations Summary Report](#)
- [Today's Operations Report](#)
- [Revenue Center Details Report](#)

[Daily Operations Report](#)

[Day Part Sales Summary Report](#)

[Day Part Operations Summary Report](#)

[Today's Operations Report](#)

[Revenue Center Details Report](#)

Related Topics:

[Running Standard Reports](#)

[Modifying Standard Reports](#)

Daily Operations Report

The Daily Operations report provides an overview of revenue totals and operating metrics, as described in the following table:

Report Section	Column	Shows	Drill Down Report
Total Revenue	Total Revenue	Total revenue reported for the organization.	
	Net Sales	Net sales for the organization.	Sales Mix Summary Report
	Gross Sales	Gross sales for the organization.	Control Report

Report Section	Column	Shows	Drill Down Report
	Discounts	All discounts that affect net and gross sales for the organization.	Daily Discounts Report
	Service Charges	All service charges that affect the net and gross sales for the organization.	Service Charges Report
	Taxes	All taxes that affect the net and gross sales for the organization.	Taxes Report
Total Operating Cost	Total Operating Cost	Total operating cost for the organization (Cost of Goods Sold + Labor Cost).	
	Cost of Goods Sold	Total cost of goods sold by the organization.	Cost of Goods Sold Summary
	Labor Cost	Total amount paid out to employees for all positions in the organization.	Job Code Summary
Total Operating Margin	Total Operating Margin	Total operating margin for the organization (Total Revenue - Total Operating Cost).	
	Receipts	Total amount on all open and closed checks for all areas of the organization.	Receipts
	Paid In	Total amount paid by guests.	Pay Ins
	Paid Out	Total amount paid by the organization for items like food or labor.	Pay Outs
Operating Metrics	Service		Service Performance Summary
	Guests / Avg Spend	Total number of guests and the average amount spent by each guest.	

Report Section	Column	Shows	Drill Down Report
	Checks / Avg Spend	Total number of checks and the average amount spent by each check.	
	Table Turns / Avg Spend	Total number of table turns and the average amount spent per table turn.	
	Avg Table Turns / Minutes	Average number of table turns and the average dining time in minutes per table turn.	
	Adjustments		Adjustments Detail
	Returns	Total amount of returns and the number of guests affected by a return.	
	Voids	Total amount of voids and the number of guests affected by a void.	
	Error Corrects	Total amount of error corrections and the number of guests affected by a correction.	
	Cancel	Total amount of cancellations and the number of guests affected by a canceled order.	
Labor Stats (the L&E Report does not include this section)	Regular Time	Total amount of regular hours worked and the amount of times regular hours were worked.	
	Overtime	Total amount of overtime hours worked and the amount of times overtime hours were worked	
	Sales Per Labor Hour	Amount of sales per labor hour.	

Report Section	Column	Shows	Drill Down Report
Revenue Center	Avg Hourly Pay	Average amount of pay per hour.	
	Revenue Center	List of all revenue centers.	Service Performance Summary
	Net Sales	Net Sales for the revenue center.	
	Check	Total number of checks for the revenue center.	
	Avg Check	Average check amount for the revenue center.	
	Guest	Total guest count for the revenue center.	
	Avg Guest	Average amount spent by each guest at the revenue center.	

Day Part Sales Summary Report

The Day Part Sales Summary report provides sales information and totals by Day Part, as described in the following table:

Column	Shows	Drill Down Report
Day Part	The day part is a fixed period of time, such as Lunch, Brunch, and Happy Hour.	Day Part Operations Summary Report
Days of the Week	Shows the days of the week that are applicable to the day part.	
Start Time	Shows the start time for the day part.	
End Time	Shows the end time for the day part.	
Net Sales	Shows the net sales of the organization by day part.	
Checks/Transactions	Shows the number of checks or transactions that occurred during the day part.	

Day Part Operations Summary Report

The Day Part Operations Summary report provides an overview of revenue totals and operating metrics for a specific day part, as described in the following table:

Report Section	Column	Shows	Drill Down Report
<i>Day Part Revenue</i> For example, Dinner Revenue Details.	<i>Day Part Revenue</i>	Shows the total revenue for the organization during the day part.	
	Net Sales	Shows the net sales for the organization during the day part.	Day Part Sales Mix Summary
	Gross Sales	Shows the gross sales for the organization during the day part.	
	Discounts	Shows all discounts that affect net and gross sales for the organization during the day part.	Day Part Discounts
	Service Charges	Shows all service charges that affect the organization during the day part.	Day Part Service Charges
Operating Cost	Operating Cost	Shows the total operating cost for the organization during the day part.	
	Cost of Goods Sold	Shows the total cost of goods sold by the organization during the day part.	Day Part Cost of Goods Sold Summary
	Labor Cost	Shows the total labor costs for the organization during the day part.	
Operating Margin	Operating Margin	Shows the total operating margin for the organization during the day part.	
	Receipts	Shows the total amount generated through sales by the organization during the day part.	Day Part Receipts
<i>Day Part Operating Metrics</i>	Service		Day Part Service by Quarter Hour

Report Section	Column	Shows	Drill Down Report
	Guests / Avg Spend	Total number of guests and the average amount spent by each guest.	
	Checks / Avg Spend	Total number of checks and the average amount spent by each check.	
	Table Turns / Avg Spend	Total number of table turns and the average amount spent per table turn.	
	Avg Table Turns / Minutes	Average number of table turns and the average dining time in minutes per table turn.	
	Adjustments		Adjustments Detail
	Returns	Total amount of returns and the number of guests affected by a return.	
	Voids	Total amount of voids and the number of guests affected by a void.	
	Error Corrects	Total amount of error corrections and the number of guests affected by a correction.	
	Cancel	Total amount of cancellations and the number of guests affected by a canceled order.	
Labor Stats (the L&E Report does not include this section)	Regular Time	Total amount of regular hours worked and the amount of times regular hours were worked.	Labor Summary
	Overtime	Total amount of overtime hours worked and the amount of times overtime hours were worked	

Report Section	Column	Shows	Drill Down Report
	Sales Per Labor Hour	Amount of sales per labor hour.	
	Avg Hourly Pay	Average amount of pay per hour.	
Revenue Center	Revenue Center	List of all revenue centers.	Day Part Service Performance Summary
	Net Sales	Net Sales for the revenue center.	
	Check	Total number of checks for the revenue center.	
	Avg Check	Average check amount for the revenue center.	
	Guest	Total guest count for the revenue center.	
	Avg Guest	Average amount spent by each guest at the revenue center.	

Today's Operations Report

The Today's Operations report provides an overview of revenue totals and operating metrics for the current business day, as described in the following table:

Report Section	Column	Shows	Drill Down Report
Total Revenue	Total Revenue	Shows the total revenue for the organization for the current business day.	
	Net Sales	Shows the net sales for the organization for the current business day.	Today's Net Sales Mix Summary
	Gross Sales	Shows the gross sales for the organization for the current business day.	
	Discounts	Shows all discounts that affect net and gross sales for the organization during the current business day.	Day Part Discounts

Report Section	Column	Shows	Drill Down Report
	Service Charges	Shows all service charges that affect the organization during the current business day.	Day Part Service Charges
Operating Costs	Operating Costs	Shows the total operating cost for the organization during the current business day.	
	Cost of Goods Sold	Shows the total cost of goods sold by the organization during the current business day.	Today's Cost of Goods Sold Summary
	Labor Cost	Shows the total labor costs for the organization during the current business day.	
Operating Margin	Operating Margin	Shows the total operating margin for the organization during the current business day.	
	Receipts	Shows the total amount generated through sales by the organization during the current business day.	Receipts
Operating Metrics	Service		Today's Service Performance
	Guests / Avg Spend	Total number of guests and the average amount spent by each guest.	
	Checks / Avg Spend	Total number of checks and the average amount spent by each check.	
	Table Turns / Avg Spend	Total number of table turns and the average amount spent per table turn.	

Report Section	Column	Shows	Drill Down Report
	Avg Table Turns / Minutes	Average number of table turns and the average dining time in minutes per table turn.	
	Adjustments		Adjustments Detail
	Returns	Total amount of returns and the number of guests affected by a return.	
	Voids	Total amount of voids and the number of guests affected by a void.	
	Error Corrects	Total amount of error corrections and the number of guests affected by a correction.	
	Cancel	Total amount of cancellations and the number of guests affected by a canceled order.	
Labor Stats (the L&E Report does not include this section)	Regular Time	Total amount of regular hours worked and the amount of times regular hours were worked.	Labor Summary
	Overtime	Total amount of overtime hours worked and the amount of times overtime hours were worked	
	Sales Per Labor Hour	Amount of sales per labor hour.	
	Avg Hourly Pay	Average amount of pay per hour.	
Revenue Center	Revenue Center	List of all revenue centers.	Service Performance Summary
	Net Sales	Net Sales for the revenue center.	

Report Section	Column	Shows	Drill Down Report
	Check	Total number of checks for the revenue center.	
	Avg Check	Average check amount for the revenue center.	
	Guest	Total guest count for the revenue center.	
	Avg Guest	Average amount spent by each guest at the revenue center.	

Revenue Center Details Report

The Revenue Center Details report provides sales information and totals for specific revenue centers, as described in the following table:

Column	Shows
Revenue Center	Shows a list of revenue centers.
Location	Shows the location for the revenue center.
Net Sales	Shows the net sales for the location and revenue center.
FC%	Shows the food cost percentage by location.
Guest	Shows the number of guests at the location and revenue center.
Per Guest	Shows the average amount spent per guest.
Check	Shows the number of guest checks at the location and revenue center.
Per Check	Shows the average check amount based on location and revenue center.
Tables	Shows the number of tables at the location and revenue center.
Per Tables	Shows the average check amount per table based on location and revenue center.

Reporting on Daily Detail Information

The following reports provide daily information for specific areas of operation:

- [Adjustment Details Report](#)
- [Cash Management Report](#)
- [CC Batch Activity Report](#)
- [CC Batch Report](#)
- [CC Batch Details Report](#)
- [Control Report](#)
- [Cost of Goods Sold Summary Report](#)
- [Cost of Goods Sold by Item Group](#)
- [Daily Discounts Report](#)
- [Job Code Summary Report](#)
- [Job Code Employee Detail Report](#)
- [Labor Analysis Summary Report](#)
- [Labor by Day Part and Hour Report](#)
- [Labor by Quarter Hour Report](#)
- [No Sale Report](#)
- [Sales Mix Summary Report](#)
- [Service Charges Report](#)
- [Service Performance Summary Report](#)
- [Taxes Report](#)
- [Tender Media Report](#)
- [Weather Analysis Report](#)
- [Weather by Location Report](#)

[Adjustment Details Report](#)

[Cash Management Report](#)

- [CC Batch Activity Report](#)
- [CC Batch Report](#)
- [CC Batch Details Report](#)
- [Control Report](#)
- [Cost of Goods Sold Summary Report](#)
- [Cost of Goods Sold by Item Group](#)
- [Daily Discounts Report](#)
- [Job Code Summary Report](#)
- [Job Code Employee Detail Report](#)
- [Labor Analysis Summary Report](#)
- [Labor by Day Part and Hour Report](#)
- [Labor by Quarter Hour Report](#)
- [No Sale Report](#)
- [Sales Mix Summary Report](#)
- [Service Charges Report](#)
- [Service Performance Summary Report](#)
- [Taxes Report](#)
- [Tender Media Report](#)
- [Weather Analysis Report](#)
- [Weather by Location Report](#)

Related Topics:

- [Running Standard Reports](#)
- [Modifying Standard Reports](#)

Adjustment Details Report

The Adjustment Detail report provides details regarding returns, voids, error corrections, and cancelled orders, as described in the following table:

Column	Shows	Drill Down Report
All Adjustments	Shows the total monetary value of all adjustments made to all checks, the total amount of guest checks affected by an adjustment, and the average adjustment amount per check.	

Column	Shows	Drill Down Report
Returns	Shows the total monetary value of all returns, the total amount of guest checks affected by returns, and the average return value per check.	All Checks
Voids	Shows the total monetary value of all voids, the total amount of guest checks affected by voids, and the average void value per check.	All Checks
Manager Voids	Shows the total monetary value of voids performed by managers, the total amount of guest checks affected by manager voids, and the average void value per check.	All Checks
Error Corrects	Shows the total monetary value of error corrections, the total amount of guest checks affected by error corrections, and the average correction value per check.	All Checks
Cancel	Shows the total monetary value of cancellations, the total amount of guest checks affected by cancellations, and the average cancelled value per check.	All Checks

Cash Management Report

The Cash Management report provides transaction information, as described in the following table:

Column	Shows
Location	Shows the location of the transaction.
Date and Time	Shows the date and time of the transaction.
Receptacle Name	Shows the receptacle for the transaction.
Cash Mgmt Item Type	Shows the type of transaction, such as cash, credit card type, and so on.
Starting Amount	Shows the starting amount for the transaction.
Till Transactions	
Total Deposit	

Column	Shows
Over/Short	Shows the amount over or under for the transaction.
Employee	Shows the employee responsible for the transaction.

CC Batch Activity Report

The Cash Management report provides transaction information, as described in the following table:

Column	Shows
Location	Shows the location of the transaction.
Date and Time	Shows the date and time of the transaction.
Receptacle Name	Shows the receptacle for the transaction.
Cash Mgmt Item Type	Shows the type of transaction, such as cash, credit card type, and so on.
Starting Amount	Shows the starting amount for the transaction.
Till Transactions	
Total Deposit	
Over/Short	Shows the amount over or under for the transaction.
Employee	Shows the employee responsible for the transaction.

CC Batch Report

The CC Batch report provides credit card batch details, as described in the following table:

Column	Shows	Drill Down Report
Location and Rvc	Shows the location and a list of revenue centers for the location	CC Batch Details Report
Count	Shows the total number of checks by revenue center and location.	
Payment	Shows the total number of credit card payments by revenue center and location.	

Column	Shows	Drill Down Report
% Revenue	Shows the percentage of all revenue that is accounted for by credit cards.	
Tips	Shows the total monetary value of credit card tips.	
Tips %	Shows the percentage of all tips accounted for by credit card tips.	

CC Batch Details Report

The CC Batch report provides check details for credit card batches, as described in the following table:

Column	Shows
Check	Shows the check number.
Batch	Shows the batch in which the check was processed.
Acct Number	Shows the masked credit card number used to pay the check.
Exp	Shows the expiration date for the credit card.
Employee	Shows the employee that performed the credit card transaction.
Rev Center	Shows the revenue center where the transaction was performed.
Time	Shows the date and time of the transaction.
Tips	Shows the amount of tip left on the credit card payment.
Payment	Shows the total amount on each credit card transaction.

Control Report

The Control report provides revenue, adjustment, and gross change information, as described in the following table:

Report Section	Column	Shows
Control Item	Gross Sales	Gross sales for the organization.

Report Section	Column	Shows
	Discounts	All discounts that affect net and gross sales for the organization.
	Net Sales	Net sales for the organization.
	Taxes	All taxes that affect the net and gross sales for the organization.
	Service Charges	All service charges that affect the net and gross sales for the organization.
	Total	The sum of previous fields. Gross Sales + Discounts + Net Sales + Taxes + Service Charges
	VOIDS	Total amount of voids and the number of checks affected by a void.
	Returns	Total amount of returns and the number of checks affected by a return.
	Credit Total	Total amount of credits.
	Change in Grand Total	Total monetary value of the gross sales, discounts, net sales, taxes, service charges, voids, returns, and credit.
Check Adjustments	Carry Over	Total monetary value and total number of checks carried over.
	Checks Begun	Total monetary value and total number of checks begun.
	Checks Paid	Total monetary value and total number of checks paid.
	Transfers In	Total monetary value and total number of checks transferred in.
	Transfers Out	Total monetary value and total number of checks transferred out.
	Outstanding	Total monetary value and total number of checks with outstanding funds.

Cost of Goods Sold Summary Report

The Cost of Goods Sold Summary report shows the value of goods sold, as described in the following table:

Report Section	Column	Shows	Drill Down Report
Item Group	Item Group	Shows the name of the major group and item groups.	Cost of Goods Sold by Item Group
	COGS	Cost of goods sold based on item group.	
	COGS%	Percentage of goods sold based on item group.	
	Margin Less Item Disc	Margin or profit made minus items discounted at the POS.	
	% Margin	Percentage of profit made with respect to the cost of goods sold.	
Highest Cost Menu Item	Highest Cost Menu Item	Shows menu items with the highest costs.	
	COGS	Cost of goods sold based on item cost.	
	COGS%	Percentage of goods sold based on item cost.	
	Margin Less Item Disc	Margin or profit made minus items discounted at the POS.	
	% Margin	Percentage of profit made with respect to the cost of goods sold.	
	Average Cost	Average item cost of goods with regards to sales for highest cost items.	

Cost of Goods Sold by Item Group

The Cost of Goods Sold Summary report shows detailed information about a selected item group, as described in the following table:

Column	Shows
Item Group	Shows the name of the item family group.
COGS	Cost of goods sold by menu item.
COGS%	Percentage of goods sold by menu item.
Major Group	Shows the name of the major group.
% Family Group	Percentage of cost the family group COGS that can be attributed to the menu item.
QTY Sold	Amount of the menu item sold.
Average Price	Average price by menu item.
Show Price Levels	Link to the COGS Mix by Price Levels Report.

Daily Discounts Report

The Daily Discounts report shows item and check discounts, as described in the following table:

Column	Shows	Drill Down Report
Discount Type	Shows the name of the discount.	All Checks
%	Percentage applied toward the discount.	
Total	Monetary value of the total discount for the current business day.	
% of Total	Total discounted percentage for the day, by discount type.	
Count	Number of checks affected by discounts, by discount type.	
Average	Average monetary value discounted.	
Total Checks	Total number of checks for the organization.	
Checks Discounted	Total number of checks discounted for the organization.	
% of Checks Discounted	Percentage of checks discounted for the organization.	
Avg Check Before Discount	Average check value before applying discounts.	

Column	Shows	Drill Down Report
Avg Depth of Discount	Percentage of the total value of checks discounted.	
Gross Sales	Gross sales for the organization.	
% Discount off Gross Sales	Percentage of gross sales discounted.	

Job Code Summary Report

The Job Code Summary report shows hour and pay information by job code, as described in the following table:

Column	Shows	Drill Down Report
Job Codes	Shows the job codes for all employment positions.	Job Code Employee Detail Report
Total Pay	Total pay by job code.	
Total Hours	Total work hours by job code.	
Average Hourly Pay	Average hourly pay by job code.	
Regular Pay	Monetary value of regular pay by job code.	
Regular Hours	Number of regular work hours by job code.	
Overtime Pay	Monetary value of overtime pay by job code.	
Overtime Hours	Number of overtime work hours by job code.	
Net Sales	Net sales for the organization.	
Total Labor	Total monetary value paid to the job code.	
Total Time	Total number of hours worked by the job code.	
Average Hourly Pay	Average hourly pay of all job codes.	
Labor Cost (% Net Sales)	Percentage of labor spent to accrue net sales.	
Sales Per Labor Hours	Monetary value of sales per labor hour.	

Job Code Employee Detail Report

The Job Code Employee Detail report shows hour and pay details by specific employee, as described in the following table:

Column	Shows	Drill Down Report
Job Codes	Shows a list of employees by job code and location.	Drills into information screen showing employee-specific details such as clock-in and clock-out information and hours worked.
Total Pay	Total pay by employee.	
Total Hours	Total work hours by employee.	
Average Hourly Pay	Average hourly pay by employee.	
Regular Pay	Monetary value of regular pay by employee.	
Regular Hours	Number of regular work hours by employee.	
Overtime Pay	Monetary value of overtime pay by employee.	
Overtime Hours	Number of overtime work hours by employee.	
Net Sales	Net sales for the organization.	
Total Labor	Total monetary value paid to the employee.	
Total Time	Total number of hours worked by the employee.	
Average Hourly Pay	Average hourly pay of all job codes.	
Labor Cost (% Net Sales)	Percentage of labor spent to accrue net sales.	
Sales Per Labor Hours	Monetary value of sales per labor hour.	

Labor Analysis Summary Report

The Labor Analysis Summary report presents an overview of regular pay, overtime, and hours, as described in the following table:

Column	Shows	Drill Down Report
Labor Categories	Shows all labor categories.	Labor by Day Part and Hour
Total Pay	Total monetary value of salaries paid.	
Total Hours	Total amount of hours worked by all employees.	
Theo Hours	Estimated work hours for all employees.	
Avg Hourly Pay	Average hourly pay by labor category.	
Regular Pay	Total monetary value of regular hours paid.	
Regular Hours	Total number of regular hours worked.	
Overtime Pay	Total monetary value of overtime hours paid.	
Overtime Hours	Total number of overtime hours worked.	
Net Sales	Net sales for the organization.	
Labor Cost (% Net Sales)	The amount of labor required to accrue a certain amount of sales.	
Variance to Theo Hrs	Variance with respect to forecasted or theoretical hours.	
Avg Hourly Pay	Average hourly pay for the organization.	
Sales Per Labor Hours	Monetary value of sales per labor hour.	

Labor by Day Part and Hour Report

The Labor by Day Part and Hour report presents labor information organized by day part or hours, as described in the following table:

Report Section	Column	Shows	Drill Down Report
Day Part	Day Part	Shows all day parts.	Labor by Day Part
	Total Pay	Total monetary value of salaries paid for the day part.	

Report Section	Column	Shows	Drill Down Report
	Total Hours	Total amount of hours worked by all employees during the day part.	
	Theo Hours	Estimated work hours for all employees during the day part.	
	Avg Hourly Pay	Average hourly pay per employee for the day part.	
	Regular Pay	Total monetary value of regular hours paid for the day part.	
	Regular Hours	Total number of regular hours worked for the day part.	
	Overtime Pay	Total monetary value of overtime hours paid for the day part.	
	Overtime Hours	Total number of overtime hours worked for the day part.	
Hour	Hour	Shows all labor hours for the organization.	Labor by Hour
	Total Pay	Total monetary value of salaries paid for the labor hour.	
	Total Hours	Total amount of hours worked by all employees during the labor hour..	
	Theo Hours	Estimated work hours for all employees during the labor hour.	
	Avg Hourly Pay	Average hourly pay per employee for the labor hour.	
	Regular Pay	Total monetary value of regular hours paid for the labor hour.	

Report Section	Column	Shows	Drill Down Report
	Regular Hours	Total number of regular hours worked for the labor hour.	
	Overtime Pay	Total monetary value of overtime hours paid for the labor hour.	
	Overtime Hours	Total number of overtime hours worked for the labor hour.	
All Fixed Periods			Labor by Quarter Hour

Labor by Quarter Hour Report

The Labor by Quarter Hour report presents labor information organized by 15-minute intervals, as described in the following table:

Column	Shows	Drill Down Report
Quarterly Hour	Shows a list of quarterly hours for the organization.	Labor by Day Part
Total Pay	Total monetary value of salaries paid for the quarter hour.	
Total Hours	Total amount of hours worked by all employees during the quarter hour.	
Regular Pay	Total monetary value of regular hours paid for the quarter hour.	
Regular Hours	Total number of regular hours worked for the quarter hour.	
Overtime Pay	Total monetary value of overtime hours paid for the quarter hour.	
Overtime Hours	Total number of overtime hours worked for the quarter hour.	

No Sale Report

The No Sales report shows a log of employees opening a cash register without an associated sale, as described in the following table:

Column	Shows
Location	The location of the non-sale transaction.
Business Date	The date of the non-sale transaction.
Revenue Center	The revenue center of the non-sale transaction.
Terminal	The terminal ID of the non-sale transaction.
Transaction Time	The time of the non-sale transaction.
Employee	The name of the employee responsible for the non-sale transaction.

Sales Mix Summary Report

The Sales Mix Summary report presents sales information for item groups, major groups, and family groups, as described in the following table:

Column	Shows	Drill Down Report
Item Group	Shows the name of the item group.	Sales Mix by Item Group
Major Group	Shows the name of the major group.	Sales Mix by Major Group
Family Group	Shows the name of the family group.	Sales Mix by Family Group
Gross Sales	Gross sales for the group.	
Item Discounts	Total monetary value of all discounts for the group.	
Sales Less Item Disc	Gross sale after excluding discounted items for the group..	
% Sales	Percentage of total item sales accounted for by the group.	
Qty Sold	Total amount of items sold for the group.	
% Qty Sold	Percentage of total item sales quantity accounted for by the group.	
Avg Price	Average price of items in the group.	
Top Selling Items (Net)	Shows top-selling items for the group.	

Service Charges Report

The Service Charges report present information for fees, gratuities, tips, and other service charges, as described in the following table:

Column	Shows	Drill Down Report
Service Charges	Name of the service charge.	All Checks
Total	Total monetary value by each service charge.	
% of Total	Percentage of all service charges that are accounted for by each service charge.	
Count	Total number of checks affected by each service charge.	
Average	Average monetary value of the service charge.	

Service Performance Summary Report

The Service Performance Summary report presents an overview of all guests, checks, and averages by Day Part and Hour, as described in the following table:

Report Section	Column	Shows	Drill Down Report
Day Part	Day Part	Shows all day parts.	Day Part Service by Quarter Hour
	Net Sales	Net sales for the organization.	
	% Sales	Percentage of net sales accounted for by the service charge.	
	Guests	Total number of guests.	
	Sales per Guest	Monetary value of sales per guest.	
	Checks	Total number of checks.	
	Avg Check	Average value of checks.	
	Table Turns	Total number of table turns.	

Report Section	Column	Shows	Drill Down Report
	Avg Minutes	Average time in minutes that checks remain open.	
Hour	Hour	Shows all hours in a business day.	Service by Hour
	Net Sales	Net sales for the hour.	
	% Sales	Percentage of net sales accounted for by the hour.	
	Guests	Total number of guests during the hour.	
	Sales per Guest	Monetary value of sales per guest during the hour.	
	Checks	Total number of checks for the hour.	
	Avg Check	Average value of checks during the hour..	
	Table Turns	Total number of table turns for the hour.	
	Avg Minutes	Average time in minutes that checks remain open during the hour..	
All Fixed Periods		Shows net sales, % Sales, Guests, Sales per Guest, Checks, Avg Check, Table Turns, and Avg Minutes for all fixed periods, typically set to 15-minute intervals.	

Taxes Report

The Taxes report shows details pertaining to taxes collected and paid out, as described in the following table:

Column	Shows
Tax Type	Name of the tax type, such as state, federal, or sales.

Column	Shows
Tax Collected	Total monetary value of the tax applied to sales after rounding. For example, a 4.5% tax on a \$5.00 menu item calculates to a \$0.225 tax, but operations rounds this value to \$0.23. As a result, operations adds \$0.23 to the Tax Collected total instead of \$0.225.
% of Total Taxes	Percentage of all collected taxes accounted for by the tax type.
Taxable Sales	Total monetary value of sales eligible for the tax type.
Tax Exempt Sales	Total monetary value of sales exempt from the tax type.
% of Taxable Sales Collected	Percentage value of the taxes collected based on rounding and by excluding exempt sales. Operations calculates this value using the formula (Tax Collected / Taxable Sales). For example, when operations rounds the 4.5% tax on a \$5.00 menu item to \$0.23, operations calculates 0.23/5.00 and shows 4.6%. You can use this value to identify the cumulative skew resulting from rounding based on tax rates and pricing schemes.

Tender Media Report

The Tender Media report shows how bills were paid and information on loans and pickups, as described in the following table:

Column	Shows	Drill Down Report
Tender Type	Shows the tender or payment type.	All Checks
Total	Total monetary value for each tender or payment type.	
% Total	Percentage of the total monetary value that is accounted for by the tender or payment type.	
Count	Total number of checks for the tender or payment type that have been paid.	
Average	Average amount paid per check for the tender or payment type.	

Weather Analysis Report

The Weather Analysis report shows sales information by weather condition categories, as described in the following table:

Column	Shows	Drill Down Report
Location	Shows the name of the location.	Weather by Location
Weather Condition	Shows the weather conditions for the location.	
# Days	Shows the number of days the location is projected to experience weather condition.	
Guests	Total number of guests counted during the weather condition.	
Checks	Total number of checks created during the weather condition.	
Sales	Total monetary value of sales during the weather condition.	

Weather by Location Report

The Weather by Location report shows sales information by weather condition categories at a specific location, as described in the following table:

Column	Shows
Date	List of applicable dates.
Weather Condition	Shows the weather conditions for the day.
High Temp	Shows the high temperature for the day.
Low Temp	Shows the low temperature for the day.
Guests	Total number of guests counted during the weather condition.
Checks	Total number of checks created during the weather condition.
Sales	Total monetary value of sales during the weather condition.

Reporting on Current Business Day Information

The following reports provide sales and operations information for the current business day:

- [Today's Service Performance Report](#)
- [Today's Tenders Report](#)
- [Today's Tenders Drilldown Reports](#)

[Today's Service Performance Report](#)

[Today's Tenders Report](#)

[Today's Tenders Drilldown Reports](#)

Related Topics:

[Running Standard Reports](#)

[Modifying Standard Reports](#)

Today's Service Performance Report

The Today's Service Performance report provides details regarding sales, guests, checks, and averages for the current business day, as described in the following table:

Report Section	Column	Shows
Day Part	Day Part	Shows all day parts.
	Net Sales	Net sales for the organization and for each day part.
	% Sales	Percentage of net sales accounted for by the service charge.
	Guests	Total number of guests.
	Sales per Guest	Average monetary value of sales per guest.
	Checks	Total number of checks.
	Avg Check	Average value of checks.

Report Section	Column	Shows
Hour	Table Turns	Total number of table turns.
	Avg Minutes	Average time in minutes that checks remain open.
	Hour	Shows all hours in a business day.
	Net Sales	Net sales for the hour.
	% Sales	Percentage of net sales accounted for by the hour.
	Guests	Total number of guests during the hour.
	Sales per Guest	Average monetary value of sales per guest during the hour.
	Checks	Total number of checks for the hour.
	Avg Check	Average value of checks during the hour..
	Table Turns	Total number of table turns for the hour.
All Fixed Periods	Avg Minutes	Average time in minutes that checks remain open during the hour..
		Shows net sales, % Sales, Guests, Sales per Guest, Checks, Avg Check, Table Turns, and Avg Minutes for all fixed periods, typically set to 15-minute intervals.

Today's Tenders Report

The Today's Tenders report provides details regarding payments, loans, and pickups by tender type for the current business day, as described in the following table:

Column	Shows	Drill Down Report
Revenue Center	A list of locations and the revenue centers in each location.	
Cash	Total monetary value of payments with cash.	
Comps	Total monetary value of complimentary items.	Today's Comps

Column	Shows	Drill Down Report
Credit Card	Total monetary value of payments with credit cards.	Today's Credit Card Report
Direct Bill		Today's Direct Bill
Room Charge	Total monetary value of room charges processed.	Today's Room Charges
Other Tenders	Total monetary value of payments through other tenders.	Today's Other Tenders
Paid Out	Total monetary value paid out by the organization.	
Paid In	Total monetary value paid in to the organization.	

Today's Tenders Drilldown Reports

The Today's Tenders report drills down to the following reports:

- Today's Comps
- Today's Credit Card
- Today's Direct Bill
- Today's Room Charges
- Today's Other Tenders

These reports show detailed information about the guest checks applicable to the tender type, as described in the following table:

Column	Shows	Drill Down Report
Location / Check	A list of the locations, tender types, and the applicable guest check IDs.	Check Detail
Date	The date the guest check was created.	
Time	The time the guest check was created.	
Guest Name	The name of the guest.	
Reference Info		
Employee	The employee who created the check.	

Column	Shows	Drill Down Report
<i>Tender</i> For example, the Today's Room Charges report labels this column Service Charges .	The total monetary value of tender type in the guest check.	
Line Total		

Reporting on Key Performance Indicators

The following reports provide information for comparing key performance indicators (KPIs):

- [Store and Date Comparison Report](#)
- [Store Comparison Report](#)
- [Daily Operations Comparison by Location Report](#)
- [Daily Operations Comparison by Dates Report](#)
- [Daily Operations Comparison by Revenue Center Report](#)
- [Sales Comparison by Location Report](#)
- [Today's Store Comparison Report VAT](#)

[Store and Date Comparison Report](#)

[Store Comparison Report](#)

[Daily Operations Comparison by Location Report](#)

[Daily Operations Comparison by Dates Report](#)

[Daily Operations Comparison by Revenue Center Report](#)

[Sales Comparison by Location Report](#)

[Today's Store Comparison Report VAT](#)

Related Topics:

[Running Standard Reports](#)

[Modifying Standard Reports](#)

Store and Date Comparison Report

The Store and Date Comparison Report shows key performance indicators for each store and date, as described in the following table:

Column	Shows
Location	A list of all locations, and then a list of dates for each location.
Net Sales	

Column	Shows
Prep Cost	Total cost of preparation.
Labor Cost	Total cost of labor.
Margin Less Item Disc	Margin or profit made minus items discounted at the POS.
Guests	Total number of guests at the given location and date.
Per Guest	Average amount spent by each guest at the given location and date.
Discounts	Total monetary value of discounts removed from the gross sales at the given location and date.
Overtime	Total amount paid in overtime wages to employees at the given location and date.

Store Comparison Report

The Store Comparison Report shows key performance indicators for each store location, as described in the following table:

Column	Shows
Location	A list of all locations.
Net Sales	
Prep Cost	Total cost of preparation.
Labor Cost	Total cost of labor.
Margin Less Item Disc	Margin or profit made minus items discounted at the POS.
Guests	Total number of guests at the given location.
Per Guest	Average amount spent by each guest at the given location.
Discounts	Total monetary value of discounts removed from the gross sales at the given location.
Overtime	Total amount paid in overtime wages to employees at the given location.

Daily Operations Comparison by Location Report

You can use the location selection filter to configure the Daily Operations Comparison by Location report to perform a side-by-side comparison of two locations. The report shows values for both entered locations as well as the variance between the two locations, as described in the following table:

Report Section	Column	Shows for Each Location
Total Revenue	Net Sales	The total net sales and the percentage accounted for of the total revenue.
	Gross Sales	The gross sales.
	Discounts	The total of all tendered discounts and the percentage accounted for of the total revenue.
	Service Charges	The total of all service charges and the percentage accounted for of the total revenue.
	Taxes	The total of all taxes and the percentage accounted for of the total revenue.
Total Operating Costs	Costs of Goods Sold	The total cost of goods sold and the percentage accounted for of the total operating costs.
	Labor Cost	The total cost of labor and the percentage accounted for of the total operating costs.
Total Operating Margin	Receipts	
	Paid In	The total amount paid in to the location.
	Paid Out	The total amount paid out of the location.
Operating Metrics	Guest / Avg Spend	The total number of guests and the average amount spent by each guest.
	Checks / Avg Spend	The total number of guest checks and the average value of each guest check.
	Table Turns / Avg Spend	The total number of table turns and the average amount spent by each table.
	Avg Table Turns / Minutes	
	Returns	The total cost of returns and the total number of returns.
	Error Corrects	The total cost of error corrections and the total number of error corrections.

Report Section	Column	Shows for Each Location
	Cancels	The total cost of cancelled items and the total number of cancelled items.
	Regular Hours	The total number of regular hours worked.
	Overtime	The total number of overtime hours worked.
	Sales Per Hour	The average value of sales per hours worked.
	Avg Hourly Pay	The average hourly wage for employees.

Daily Operations Comparison by Dates Report

You can use the business date selection filter to configure the Daily Operations Comparison by Dates report to perform a side-by-side comparison of two business dates. The report shows values for both entered dates as well as the variance between the two dates, as described in the following table:

Report Section	Column	Shows for Each Business Date
Total Revenue	Net Sales	The total net sales and the percentage accounted for of the total revenue.
	Gross Sales	The gross sales.
	Discounts	The total of all tendered discounts and the percentage accounted for of the total revenue.
	Service Charges	The total of all service charges and the percentage accounted for of the total revenue.
	Taxes	The total of all taxes and the percentage accounted for of the total revenue.
Total Operating Costs	Costs of Goods Sold	The total cost of goods sold and the percentage accounted for of the total operating costs.
	Labor Cost	The total cost of labor and the percentage accounted for of the total operating costs.
Total Operating Margin	Receipts	

Report Section	Column	Shows for Each Business Date
Operating Metrics	Paid In	The total amount paid in during the business day.
	Paid Out	The total amount paid out during the business day.
	Guest / Avg Spend	The total number of guests and the average amount spent by each guest.
	Checks / Avg Spend	The total number of guest checks and the average value of each guest check.
	Table Turns / Avg Spend	The total number of table turns and the average amount spent by each table.
	Avg Table Turns / Minutes	
	Returns	The total cost of returns and the total number of returns.
	Error Corrects	The total cost of error corrections and the total number of error corrections.
	Cancel	The total cost of cancelled items and the total number of cancelled items.
	Regular Hours	The total number of regular hours worked.
	Overtime	The total number of overtime hours worked.
	Sales Per Hour	The average value of sales per hours worked.
Avg Hourly Pay	The average hourly wage for employees.	

Daily Operations Comparison by Revenue Center Report

You can use the location selection filter to configure the Daily Operations Comparison by Revenue Center report to perform a side-by-side comparison of two revenue centers. The report shows values for both entered revenue centers as well as the variance between the two revenue centers, as described in the following table:

Report Section	Column	Shows for Each Revenue Center
Total Revenue	Net Sales	The total net sales and the percentage accounted for of the total revenue.
	Gross Sales	The gross sales.
	Discounts	The total of all tendered discounts and the percentage accounted for of the total revenue.
	Service Charges	The total of all service charges and the percentage accounted for of the total revenue.
	Taxes	The total of all taxes and the percentage accounted for of the total revenue.
Costs of Goods Sold	Costs of Goods Sold	The total cost of goods sold and the percentage accounted for of the total operating costs.
	Labor Cost	The total cost of labor and the percentage accounted for of the total operating costs.
Total Operating Margin	Receipts	
	Paid In	The total amount paid in to the revenue center.
	Paid Out	The total amount paid out of the revenue center.
Operating Metrics	Guest / Avg Spend	The total number of guests and the average amount spent by each guest.
	Checks / Avg Spend	The total number of guest checks and the average value of each guest check.
	Table Turns / Avg Spend	The total number of table turns and the average amount spent by each table.
	Avg Table Turns / Minutes	
	Returns	The total cost of returns and the total number of returns.
	Error Corrects	The total cost of error corrections and the total number of error corrections.

Report Section	Column	Shows for Each Revenue Center
	Cancels	The total cost of cancelled items and the total number of cancelled items.
	Regular Hours	The total number of regular hours worked.
	Overtime	The total number of overtime hours worked.
	Sales Per Hour	The average value of sales per hours worked.
	Avg Hourly Pay	The average hourly wage for employees.

Sales Comparison by Location Report

The Sales Comparison by Location report provides a one-year sales comparison for each location, as described in the following table:

Column	Shows
Location	A list of locations.
Current Sales	The total monetary value of sales for the current business year.
Last Years Sales	The total monetary value of sales for the previous business year.
Variance	The percentage difference between the current year and the previous year.
Budget	The budget for the current business year.
Variance	The percentage difference between the net sales and the budget.
Forecast	The forecasted amount.
Variance	The percentage difference between the net sales and the forecasted total.

Today's Store Comparison Report VAT

The Today's Store Comparison Report VAT report shows key performance indicators that are affected by value-added taxes (VAT), as described in the following table:

Column	Shows
Location	A list of locations.

Column	Shows
Sales net VAT	The total monetary value of sales that included a VAT.
Checks	The total number of guest checks.
Per Check	The average amount spent per guest check after adjusting for VAT.
Food Cost	The total cost of food.
FC%	
Labor Cost	The total cost of labor.
LC%	
Overtime	The total amount of overtime hours worked.
Gross after Disc	The gross revenue after applying discounts.
Discounts	The total value of discounts applied.

Reporting on Employee Information

The following reports provide information about employee performance, schedules, and time cards:

- [Item Sales Detail by Employee Report](#)
- [Item Sales Summary by Employee](#)
 - [Item Sales Detail by Employee Report](#)
 - [Item Sales Summary by Employee](#)
 - [Employee Control Report](#)
 - [Employee Sales Performance Report](#)
 - [Employees Report](#)
 - [HR Employee Detail Report](#)
 - [Employee Earnings Detail Report](#)
 - [Employee Sales Summary Report](#)
 - [Employee Time Card Detail Report](#)
 - [Manager Control Report](#)
 - [Staff Scheduling Performance](#)
 - [Time Card Summary Report](#)
 - [Employee Time Card Detail Report](#)
 - [Employee Exceptions Report](#)
 - [Employee Productivity Report](#)

Related Topics:

- [Running Standard Reports](#)
- [Modifying Standard Reports](#)

Item Sales Detail by Employee Report

The Item Sales Detail by Employee report shows quantity and gross sales details for each employee and each item sold by the employee, as described in the following table:

Column	Shows
Employee Item Name	A list of employees and the items they sold.
Location	The location at which the employee works.
Qty Sold	The quantity of the selected item sold by the employee.
Gross Sales	The gross sales for the item sold by the employee.
% Sales	The percentage of gross sales accounted for by the employee in total and for the selected item.

Item Sales Summary by Employee

The Item Sales Summary by Employee report shows the quantity and gross sales for each employee, as described in the following table:

Column	Shows
Employee	A list of employees.
Location	The location at which the employee works.
Qty Sold	The quantity of the items sold by the employee.
Gross Sales	The gross sales for the employee.
% Sales	The percentage of gross sales for the organization accounted for by the employee.

Employee Control Report

The Employee Control report shows all discounts, voids, and errors by the employee, as described in the following table:

Column	Shows	Drill Down Report
Employee	A list of employees.	All Checks
Location	The location at which the employee works.	
Net Sales	The net sales for the employee at the location.	
Error Corrects	The total monetary value of error corrects for the employee.	All Checks

Column	Shows	Drill Down Report
% Sales	The percentage of all monetary corrects attributed to the employee.	
Voids	The total monetary value of voids by the employee.	All Checks
% Sales	The percentage of all voids attributed to the employee.	
Mgr Voids	The total monetary value of manager voids for the employee.	All Checks
% Sales	The percentage of all manager voids attributed to the employee.	
Discounts	The total monetary value discounted by the employee.	All Checks
% Sales	The percentage of all discounts attributed to the employee.	

Employee Sales Performance Report

The Employee Sales Performance report shows all discounts, voids, and errors by the employee, as described in the following table:

Column	Shows	Drill Down Report
Employee	A list of employees.	All Checks
Location	The location at which the employee works.	
Net Sales	The net sales for the employee at the location.	
%Sales	The percentage of the net sales for location attributed to the selected employee.	
Checks	The total number of checks created by the employee.	
Avg Checks	The average monetary value of each check created by the employee.	
Guest	The total number of guests served by the employee.	

Column	Shows	Drill Down Report
Avg Dining Time	The average dining time for guests served by the employee.	
Table Turns	Total number of table turns performed by the employee.	
Voids	Total monetary value of voids performed or required by the employee.	
Discounts	Total monetary value of discounts associated with the employee.	
Service Charges	Total monetary value of service charges applied or required by the employee.	

Employees Report

The Employee report shows all employees by location with their human resources and payroll information, as described in the following table:

Column	Shows	Drill Down Report
Employee	A list of all employees.	HR Employee Detail
Location	The location at which the employee works.	
Payroll ID	Any external payroll ID.	
Hired	The hiring date for the employee.	
Terminated	The termination date for the employee.	
Total Pay	The total earnings for the employee.	Employee Earnings Detail
Overtime Pay	The total overtime earnings for the employee.	
Sales	The total monetary value of sales by the employee.	Employee Sales Summary
Tips	The total monetary value of tips claimed by the employee.	Time Card Totals

HR Employee Detail Report

The HR Employee Detail report shows human resources information for each employee, as described in the following table:

Report Section	Field	Shows
<i>Employee Name</i>	Hired	The hiring date.
	Payroll ID	Any external payroll ID.
	Date of Birth	The date of birth.
	Gender	The gender.
	SSN	The social security number.
	Terminated	The termination date.
	Salary Type	The salary type.
	Salary	The salary.
Contact	Address	The street address.
	City	The city of residence.
	County	The county of residence.
	Postal Code	The zip or postal code of residence.
	Country	The country of residence.
	Phone	The primary phone number.
	Fax	The fax number.
	Other Number	Any alternate phone number provided by the employee.
Emergencies	Email	The email address.
	Name	The name of the emergency contact.
	Address	The resident address of the emergency contact.
I9	Phone	The phone number of the emergency contact.
	Resident Status	The residency status.
	I9 Category	The I9 category.
	Doc 1 Type	The document type for document 1.
	Number	The number for document 1.
	Expires	The expiration date for document 1.
	Work Permit Number	The work permit number, if applicable.

Report Section	Field	Shows
	Doc 2 Type	The document type for document 2.
	Number	The number for document 2.
	Expires	The expiration date for document 2.
	Expires	The expiration date for the work permit, if applicable.
Banking	Bank 1	The name of bank 1.
	Routing Code	The routing number for bank 1.
	Account Type	The account type at bank 1.
	Account Number	The account number for bank 1.
	Amount Type	The amount type to be deposited at bank 1.
	Amount	The amount deposited at bank 1 for each pay cycle.
	Bank 2	The name of bank 2.
	Routing Code	The routing number for bank 2.
	Account Type	The account type at bank 2.
	Account Number	The account number for bank 2.
	Amount Type	The amount type to be deposited at bank 2.
	Amount	The amount deposited at bank 2 for each pay cycle.

Employee Earnings Detail Report

The Employee Earnings Detail report shows work hour and payment information for an employee, as described in the following table:

Column	Shows	Drill Down Report
Job	The employee name and the job code(s) associated with the employee.	Employee Job Time Card Detail

Column	Shows	Drill Down Report
Hours/Regular	The total number of regular hours worked by the employee and for each job.	
Hours/Overtime	The total number of overtime hours worked by the employee and for each job.	
Hours/Other	The total number of other hours worked by the employee and for each job.	
Hours/Total	The total number of hours (regular + overtime + other) worked by the employee and for each job.	
Pay/Regular	The total amount of regular pay earned by the employee and for each job.	
Pay/Overtime	The total amount of overtime pay earned by the employee and for each job.	
Pay/Other	The total amount of other pay earned by the employee and for each job.	
Pay/Total	The total amount of pay (regular + overtime + other) earned by the employee and for each job.	

Employee Sales Summary Report

The Employee Earnings Detail report shows work hour and payment information for an employee, as described in the following table:

Column	Shows
Date	The employee name, then a list of days worked by the employee.
Net Sales	The total net sales for the employee, then the net sales for the employee by each day worked.
% Sales	The percentage of the employee's net sales attributed to the selected day.
Checks	The total number of guest checks created by the employee, then the number created by the employee for each day worked.

Column	Shows
Avg Check	The average monetary value of each guest check created by the employee, then the average value of each guest check created by the employee for each day worked.
Guests	The total number of guests served by the employee, then the number served by the employee for each day worked.
Voids	The total monetary value of voids performed or required by the employee, then the value of voids for the employee for each day worked.
Discounts	The total monetary value of discounts associated with the employee, then the value of discounts associated with the employee for each day worked.
Service Charges	The total monetary value of service charges applied or required by the employee, then the value of service charges for the employee for each day worked.

Employee Time Card Detail Report

Manager Control Report

The Manager Control report shows information for all transactions that were performed by someone other than the check owner that involved discounts, voids, and adjustments, as described in the following table:

Column	Shows	Drill Down Report
Location	The name of the location.	
Revenue Center	The name of the revenue center in the location.	
Check	The check number.	Check Detail
Type	The transaction type.	
Item Name	The name of the item in the transaction.	
Transaction Time	The date and time of the transaction.	
Check Employee	The name of the employee who entered the check.	
Transaction/Authorizing Emp	The name of the employee who authorized the transaction.	

Column	Shows	Drill Down Report
Line Total	The line total.	

Staff Scheduling Performance

The Staff Scheduling Performance report provides detailed information comparing forecasted staffing, scheduled staffing, and actual staffing, as described in the following table:

Column	Shows	Drill Down Report
Location	A list of the locations followed by a list of business dates.	
Business Date		
Sched Hours	The number of staffing hours scheduled.	
Theo Hours	The number of staffing hours forecasted.	
Actual Hours	The number of staffing hours worked.	
Var to Actual Hours Sched	The variances between the actual hours and the scheduled hours.	
Var to Actual Hours Theo	The variances between the actual hours and the forecasted hours.	
Sched Pay	The amount of payment scheduled.	
Theo Pay	The amount of payment forecasted.	
Actual Pay	The amount paid out to employees.	
Var to Actual Pay Sched	The variances between the actual amount paid out and the scheduled amount.	
Var to Actual Pay Theo	The variances between the actual amount paid out and the forecasted amount.	

Time Card Summary Report

The Time Card Summary report shows time card information by job code and by employee, as described in the following table:

Column	Shows	Drill Down Report
Job Code Number	A list of job code numbers followed by the ID numbers of employees that worked under the selected job code.	
Employee Number		
Job Code Name	A list of job code names followed by the names of employees that worked under the selected job code.	Employee Time Card Detail

Column	Shows	Drill Down Report
Payroll ID	Any external payroll ID.	
Hours/Regular	The total number of regular hours worked by all employees for the job code, then the regular hours worked by the selected employee.	
Hours/Overtime	The total number of overtime hours worked by all employees for the job code, then the overtime hours worked by the selected employee.	
Hours/Total	The total number of hours (regular + overtime) worked by all employees for the job code, then the total hours (regular + overtime) worked by the selected employee.	
Pay/Regular	The total amount of regular pay for all employees for the job code, then the regular pay for the selected employee.	
Pay/Overtime	The total amount of overtime pay for all employees for the job code, then the overtime pay for the selected employee.	
Pay/Total	The total amount of pay (regular + overtime) for all employees for the job code, then the total pay (regular + overtime) for the selected employee.	

Employee Time Card Detail Report

The Employee Time Card Detail report provides hour and pay information for each payroll entry for a selected employee, as described in the following table:

Column	Shows
Employee Name	The name of the employee.
Payroll ID	Any external payroll ID.
Job	A list of job code names worked by the employee.

Column	Shows
Clock In	The date and time the employee clocked in for the selected job.
Clock Out	The date and time the employee clocked out for the selected job.
Hours/Regular	The amount of regular hours the employee worked for the selected job.
Hours/Overtime	The amount of overtime hours the employee worked for the selected job.
Pay/Regular	The amount of regular pay for the employee for the selected job.
Pay/Overtime	The amount of overtime pay for the employee for the selected job.
Sales	The amount of gross sales for the employee for the selected job.
Tips	The amount of tip claimed by the employee for the selected job.
Adj	

Employee Exceptions Report

The Employee Exceptions report shows employee transactions and adjustments, as described in the following table:

Column	Shows
Employee	A list of employees.
Location	The location at which the employee works.
Net Sales	The total net sales for the employee.
Discount %	The percentage deducted from the employee net sales due to discounts.
Error Correct %	The percentage deducted from the employee net sales due to error corrections.
Void %	The percentage deducted from the employee net sales due to menu item voids.

You can then configure the columns to show the following information:

Column	Shows	Drill Down Report
Discount \$	The monetary value deducted from the employee net sales due to discounts.	All Checks

Column	Shows	Drill Down Report
Error Correct \$	The monetary value deducted from the employee net sales due to error corrections.	All Checks
Void \$	The monetary value deducted from the employee net sales due to manager-authorized voids.	All Checks
Mgr Void %	The percentage deducted from the employee net sales due to manager-authorized voids.	All Checks
Mgr Void \$	The monetary value deducted from the employee net sales due to manager-authorized voids.	All Checks
Return Void %	The percentage deducted from the employee net sales due to returns.	
Return Void \$	The monetary value deducted from the employee net sales due to returns.	All Checks
Trans Cxl %	The percentage deducted from the employee net sales due to cancelled transactions.	
Trans Cxl \$	The monetary value deducted from the employee net sales due to cancelled transactions.	All Transactions
No Sale #	The total number of times the employee activated No Sales .	All Transactions
All Tips %	The percentage of all tips claimed by the employee.	
All Tips \$	The monetary value of all tips claimed by the employee.	
Charge Tip %	The percentage of charged tips for the employee relative to the employee net sales.	
Charge Tip \$	The monetary value of charged tips for the employee.	All Checks

Employee Productivity Report

The Employee Productivity report shows key performance indicators for employees as well as information about lost sales opportunities, as described in the following table:

Column	Shows
Employee	A list of employees.
Location	The location at which the employee works.
Net Sales	The total net sales for the employee.
# Checks	The total number of guest checks created by the employee.
# Cover	The total guest cover count for the employee.

You can then configure the columns to show the following information:

Column	Shows	Drill Down Report
Diff from Avg		
Lost Sales Opp		
Avg % Tip	The average monetary value of tips earned by the employee.	
Lost Tip Opp		
Tips	The total monetary value of tips earned by the employee.	
Srvc Chrg	The total monetary value of service charges applied or required by the employee.	All Checks
Discounts	The total monetary value of discounts associated with the employee.	All Checks
COGS%	The percentage of goods sold by the employee.	Employee Cost of Goods Sold
Table Turns	The total number of times the employee turned a table.	
Avg Dine Time	The average dining time for tables served by the employee.	Daily Server Dining Times by Party Size
Avg Check	The average amount spent by checks created by the employee.	
Avg Cover	The average amount spent by guests served by the employee.	

Column	Shows	Drill Down Report
Per Cov Hr.	The average number of guests served the employee per hour.	

Reporting on Kitchen Display System Performance

The following reports provide information on Kitchen Display System (KDS) stations in a restaurant:

- [KDS Summary Report](#)
- [Today's KDS Summary Report](#)
- [KDS Orders by Prep Time Report](#)
- [KDS Orders by Station Report](#)
- [Speed of Service Report](#)

[KDS Summary Report](#)

[KDS Orders by Prep Time Report](#)

[KDS Orders by Station Report](#)

[Speed of Service Report](#)

[Today's KDS Summary Report](#)

KDS Summary Report

The KDS Summary report shows accumulated data for KDS station preparation times for KDS across several business days, as described in the following table:

Column	Shows	Drill Down Report
Order Prep Time	A list of preparation times.	Orders by Prep Time
Count of Orders	The total number of orders processed for the selected prep time range over the time period being evaluated.	
% Total Orders	The percentage of all orders that required the selected prep time range.	
Station	The station that prepared the order.	KDS Orders by Station

KDS Orders by Prep Time Report

The KDS Orders by Prep Time report shows details about orders that required the selected preparation time range, as described in the following table:

Column	Shows	Drill Down Report
Check	The check ID.	Check Detail
Table	The table number for the guests, if applicable.	
Transaction Round	The number of times the order was added to the check, or the number of times an employee accessed the check.	
Station	The name of the station that prepared the menu item.	
Check Opened	The date and time the check was created.	
Prep Time	The time in took the station to prepare the menu item, in seconds.	

KDS Orders by Station Report

The KDS Orders by Station report shows details about orders that were prepared at the selected KDS station, as described in the following table:

Column	Shows	Drill Down Report
Check	The check ID.	Check Detail
Table	The table number for the guests, if applicable.	
Transaction Round	The number of times the order was added to the check, or the number of times an employee accessed the check.	
Station	The name of the station that prepared the menu item.	
Check Opened	The date and time the check was created.	
Prep Time	The time in took the station to prepare the menu item, in seconds.	

Speed of Service Report

The Speed of Service report shows details about the quickness at which guests received service or attention, as described in the following table:

Column	Shows
Location Order Type	A list of locations, then a list of order types for each location.
Net Sales	The net sales for the location and order type.
Transactions	The number of transactions for the location and order type.
Avg SOS Time	The average speed of service for the location and order type.
Avg Prep Time	The average preparation time for the location and order type.
Parked Cars	The number of parked cars. Optional.

Today's KDS Summary Report

The Today's KDS Summary report shows information about KDS station preparation times for the current business days, as described in the following table:

Column	Shows	Drill Down Report
Order Prep Time	A list of preparation times.	Orders by Prep Time
Count of Orders	The total number of orders processed for the selected prep time range over the time period being evaluated.	
% Total Orders	The percentage of all orders that required the selected prep time range.	
Station	The station that prepared the order.	KDS Orders by Station

Reporting on Menus

The following reports provide sales and cost information about menu items:

- [Combo Items Summary Report](#)
- [Menu Engineering by Major and Family Group Report](#)
- [Major Group Menu Engineering Report](#)
- [Family Group Menu Engineering Report](#)
- [Item Groups Average Pricing Report](#)
- [Pricing Detail by Major Group Report](#)
- [Pricing Detail by Family Group Report](#)
- [Menu Item Average Pricing Report](#)
- [Menu Item Affinity Sales Report](#)

[Combo Items Summary Report](#)

[Menu Engineering by Major and Family Group Report](#)

[Major Group Menu Engineering Report](#)

[Family Group Menu Engineering Report](#)

[Item Groups Average Pricing Report](#)

[Pricing Detail by Major Group Report](#)

[Pricing Detail by Family Group Report](#)

[Menu Item Average Pricing Report](#)

[Menu Item Affinity Sales Report](#)

Combo Items Summary Report

The Combo Items Summary report shows sales and quantity information for menu items as well as components in a combo meal.

The Menu Item section shows information about menu items, as described in the following table:

Column	Shows
Menu Item	The menu item name of the combo.

Column	Shows
Net Sales	The net sales for the combo.
% Net Sales	The percentage of all combo menu item net sales attributed to the selected combo.
Qty Sold	The total number of the combo sold.
% Qty Sold	The percentage of the quantity of all combo sales attributed to the selected combo.
Sales as Combo	The total number of sales generated by the combo.
% Net Sales	The percentage of all combo sales attributed to the selected combo.
Qty as Combo	The quantity of the menu item sold as a combo.
Qty A La Carte	The quantity of the menu item sold a la carte.
% Qty as Combo	The percentage of the menu item sales where it was sold as a combo.

The Combo Item section shows information about the combo meals and details for each component, as described in the following table:

Column	Shows
Combo Meal Component	The menu item name of the combo.
Combo Sales	The total monetary value of sales created by the combo.
% Net Sales	The percentage of the net sales attributed to the combo.
Combos Sold	The total number of combo sales.
Menu Items Sold	The total number of menu items sold.
% Items Sold	The percentage of combo sales relative to all menu items.
% Combo Component	The percentage all menu item sales in which the menu item is a combo component.

Menu Engineering by Major and Family Group Report

The Menu Engineering by Major and Family Group report shows individual item revenues and contribution margins as organized by major and family menu item groups, as described in the following table:

Column	Shows	Drill Down Report
Item Group	The name of the item group.	Major Group Menu Engineering or Family Group Menu Engineering
Qty Sold	The total number of items in the item group that were sold.	
Gross Sales after Disc	The gross sales after applying discounts.	
Prep Cost	The total expenditure for preparing menu items belonging to the group.	
Cost %		
Margin Less Item Disc	The net sales after applying discounts.	
% Qty		
%Margin		

You can also click **Sales Detail by Menu Item** to view the more detailed **Sales Detail by Menu Item** report, or click a listed day part to view information specific to the day part on the **Day Part Menu Engineering by Menu Item** report.

Major Group Menu Engineering Report

The Major Group Menu Engineering report shows individual menu item revenues and contribution margins for a specific major item group, as described in the following table:

Column	Shows
Menu Item Name	A list of the menu items that belong to the major group.
Qty Sold	The total number of items sold.
Gross Sales after Disc	The gross sales after applying discounts.
Prep Cost	The total expenditure for preparing the menu item.
Cost %	
Margin Less Item Disc	The net sales after applying discounts.
% Qty	
%Margin	

Family Group Menu Engineering Report

The Family Group Menu Engineering report shows individual menu item revenues and contribution margins for a specific family item group, as described in the following table:

Column	Shows
Menu Item Name	A list of the menu items that belong to the family group.
Qty Sold	The total number of items sold.
Gross Sales after Disc	The gross sales after applying discounts.
Prep Cost	The total expenditure for preparing the menu item.
Cost %	
Margin Less Item Disc	The net sales after applying discounts.
% Qty	
%Margin	

Item Groups Average Pricing Report

The Item Groups Average Pricing report shows the average prices for groups of stores, as described in the following table:

Column	Shows	Drill Down Report
Major Group Family Group	A list of major groups, and a list of the family groups that belong to each major group.	Pricing Detail by Major Group Pricing Detail by Family Group Report
Avg Price	The average price of items in the selected group.	Menu Item Average Pricing Report
Avg Cost	The average cost of items in the selected group.	
Avg FC%	The average food cost percentage in the selected group.	
Avg Margin	The average margin earned by the selected group.	

Pricing Detail by Major Group Report

The Pricing Detail by Major Group report shows price and cost information for menu items sorted by major groups, as described in the following table:

Column	Shows
Menu Item	A list of major groups, then a list of menu items that belong to the major group.
POS Number	The POS reference number.
Location	The location selling the menu item.
Revenue Center	The revenue centers at the location that sell the menu item.
Level Name	The menu level of the menu item.
Price Level	The price level of the menu item.
Price	The price of the menu item.
Cost	The cost of the menu item.

Pricing Detail by Family Group Report

The Pricing Detail by Family Group report shows price and cost information for menu items sorted by family groups, as described in the following table:

Column	Shows
Menu Item	A list of family groups, then a list of menu items that belong to the family group.
POS Number	The ID number of the point of sales terminal.
Location	The location selling the menu item.
Revenue Center	The revenue centers at the location that sell the menu item.
Level Name	The menu level of the menu item.
Price Level	The price level of the menu item.
Price	The price of the menu item.
Cost	The cost of the menu item.

Menu Item Average Pricing Report

The Menu Item Averaging Pricing report shows average price and cost information for menu items.

The Family Group section shows information about family groups at various locations, as described in the following table:

Column	Shows	Drill Down Report
Family Group Avg By Location	A list of family groups, then a list locations selling items in that family group.	Pricing Detail by Family Group
Avg Price	The average price of menu items belonging to the family group at the selected location.	
Avg Cost	The average cost of menu items belonging to the family group at the selected location.	
Avg FC%		
Avg Margin	The average amount earned for each menu item sold that belongs to the family group at the selected location.	

The Menu Item section shows information about each menu item, as described in the following table:

Column	Shows	Drill Down Report
Menu Item	A list of menu items.	Pricing Detail by Menu Item
Avg Price	The average price of menu items belonging to the family group at the selected location.	
Avg Cost	The average cost of menu items belonging to the family group at the selected location.	
Avg FC%		
Avg Margin	The average amount earned for each menu item sold that belongs to the family group at the selected location.	

Menu Item Affinity Sales Report

The Menu Item Affinity Sales report shows the frequency at which items are sold together, as described in the following table:

Column	Shows
Parent Item - All Checks Affinity Items	A list of menu items, then a list of menu items with which the first menu item was sold.

Column	Shows
POS Ref	The POS reference number for the selected menu item.
Num Chks	The total number of checks that contained the menu item.
% Chks	The percentage of checks that contained the menu item.
Qty Sold	The total number of the menu item sold.
Qty/Chk %Qty	The ratio of the items sold relative to the number of checks that contained the item. (Qty Sold / Num Chks)
Net Sales	The net sales for the menu item.
Sls/Chk %Sales	The ratio of net sales relative to the number of checks that contained the item. (Net Sales / Num Chks)
Margin	The profit earned per sale of the menu item.
Margin/Chk %Margin	The ratio of the margin relative to the number of checks that contained the item. (Margin / Num Chks)

Reporting on Menu Item Alignment

The following reports provide information on menu item alignment:

- [Definitions Alignment Report](#)
- [Major and Family Group Alignment Report](#)
- [Menu Item Alignment Major Group Masters Report](#)
- [Menu Item Alignment Family Group Masters Report](#)
- [Menu Item Alignment Report](#)
- [Unaligned Definitions Report](#)
- [Unaligned Item Groups Report](#)
- [Unaligned Menu Items Report](#)

[Definitions Alignment Report](#)

[Major and Family Group Alignment Report](#)

[Menu Item Alignment Major Group Masters Report](#)

[Menu Item Alignment Family Group Masters Report](#)

[Menu Item Alignment Report](#)

[Unaligned Definitions Report](#)

[Unaligned Item Groups Report](#)

[Unaligned Menu Items Report](#)

Definitions Alignment Report

You can create definitions, or specific instances, of the following item types in Reporting and Analytics:

- Revenue Centers
- Order Types
- Discounts
- Service Charges
- Taxes
- Tenders

- Labor Categories
- Job Codes
- Activities

You can then align a definition to inherit the properties of a master item. For example, if you create a master revenue center named *Restaurant*. You can then create a definition, or instance, of a restaurant revenue center in multiple locations. The report then shows all revenue center definitions under the master *Restaurant* revenue center.

The Definitions Alignment report shows the alignment information for definitions as described in the following table:

Column	Shows
<i>Item Type</i>	The name of the item type. For example, <i>Service Charges</i> .
Master Name	A list of master items defined for the item type. For example, <i>Charge Tip</i> and <i>GC Sale</i> .
Master POS Number	The POS reference number for the master item.
<i>Item Type Name</i>	The master item name for the location. For example, if an Alabama location uses the <i>Charge Tip Service Charge</i> , this column value is <i>Charge Tip</i> and the entry is listed under the <i>Charge Tip</i> master item.
POS Number	The POS reference number for the location. This field typically aligns with the Master POS Number for the master item that matches with the <i>Item Type Name</i> column.
Location	The name of the location.

Major and Family Group Alignment Report

The Major and Family Group Alignment report shows the alignment information for definitions of menu items sorted by major and family groups, as described in the following table:

Column	Shows
<i>Item Type</i>	The name of the item type. For example, <i>Service Charges</i> .
Master Name	A list of master items defined for the item type. For example, <i>Charge Tip</i> and <i>GC Sale</i> .
Master POS Number	The POS reference number for the master item.

Column	Shows
<i>Item Type Name</i>	The master item name for the location. For example, if an Alabama location uses the Charge Tip Service Charge, this column value is Charge Tip and the entry is listed under the Charge Tip master item.
POS Number	The POS reference number for the location. This field typically aligns with the Master POS Number for the master item that matches with the <i>Item Type Name</i> column.
Location	The name of the location.

Menu Item Alignment Major Group Masters Report

The Menu Item Alignment Major Group Masters report lists the major groups and their POS reference, as described in the following table:

Column	Shows
Major Group	A list of major groups.
POS Number	The POS reference number.

Menu Item Alignment Family Group Masters Report

The Menu Item Alignment Family Group Masters report lists the family groups and their POS reference, as described in the following table:

Column	Shows
Family Group	A list of family groups.
POS Number	The POS reference number.

Menu Item Alignment Report

The Menu Item Alignment Major Group Masters report lists the menu items that have been aligned under a master item, as described in the following table:

Column	Shows
Master Name Local Name	A list of master items, then a list of the names used at locations for the master item.
Master Number Local Number	The master POS reference number for the alignment.
Master Major Group Local Major Group	The master major group, then a list of the major groups at the locations.

Column	Shows
Master Family Group Local Family Group	The master family group, then a list of the family groups at the locations.
Level Name	The level name.
Location	The locations at which the alignments take effect.

Unaligned Definitions Report

The Unaligned Definitions report shows definitions that are not aligned with master item, as described in the following table:

Column	Shows
<i>Item Type</i>	The name of the item type. For example, Service Charges.
Master Name	A list of master items defined for the item type. For example, Charge Tip and GC Sale.
Master POS Number	The POS reference number for the master item.
<i>Item Type Name</i>	The master item name for the location.
POS Number	The POS reference number for the location.
Location	The name of the location.

Unaligned Item Groups Report

The Unaligned Item Groups report lists the major and family groups that are not aligned, as described in the following table:

Column	Shows
Major Group Name Family Group Name	A list of major groups or family groups depending on the section of the report. All items are listed as temporary because the major and family groups have not been identified.
Master Name	The name of the master item. Master names are listed as temporary because they have not been identified.
POS Number	The POS reference number.
Location	The location of the group.

Unaligned Menu Items Report

The Unaligned Menu Items report lists the menu items that are not aligned, as described in the following table:

Column	Shows
Menu Item Name	A list of menu items.
Master Name	The name of the master item.
POS Number	The POS reference number.
Location	The location of the group.

Reporting on System Administration

The following reports provide information for Enterprise Back Office administrators:

- [Daily Checklist Report](#)
- [Revenue Center Sales Comparison: Transactions vs. Daily Report](#)
- [Employee Sales Comparison: Transaction vs. Daily Report](#)
- [Menu Item Sales Comparison: Transaction vs. Daily Report](#)
- [Daily Exceptions List Report](#)
- The Download Report does not work due to security requirements.
- [EMS Batch Status Report](#)
- [Posting Exceptions Report](#)
- [Labor Runtime Error Log Report](#)
- [Last Posting Report](#)
- [Portal Log-on Report](#)
- [Portal Log-on Report Detail Report](#)
- [Portal Server Runtime Errors Report](#)
- [Posting Server Runtime Errors Report](#)
- [Posting Report](#)
- [Posting Date Detail Report](#)
- [Business Date Posting Detail Report](#)
- [VAT Comparison Report](#)
- [VAT Report Menu Item Report](#)
- [VAT Report MenuItem FixedPeriods Report](#)
- [VAT Report Tax Report](#)

[Daily Checklist Report](#)

[Revenue Center Sales Comparison: Transactions vs. Daily Report](#)

[Employee Sales Comparison: Transaction vs. Daily Report](#)

[Menu Item Sales Comparison: Transaction vs. Daily Report](#)

[Daily Exceptions List Report](#)

[EMS Batch Status Report](#)

[Posting Exceptions Report](#)

[Labor Runtime Error Log Report](#)

[Last Posting Report](#)

[Portal Log-on Report](#)

[Portal Log-on Report Detail Report](#)

[Portal Server Runtime Errors Report](#)

[Posting Server Runtime Errors Report](#)

[Posting Report](#)

[Posting Date Detail Report](#)

[Business Date Posting Detail Report](#)

[VAT Comparison Report](#)

[VAT Report Menu Item Report](#)

[VAT Report MenuItem FixedPeriods Report](#)

[VAT Report Tax Report](#)

Daily Checklist Report

The Daily Checklist report shows sales and checks from various tables.

The Daily Sales Checklist shows all sales information organized by store, as described in the following table:

Column	Shows	Drill Down Report
Location	The name of the location.	
Dly Sales	The monetary value of daily sales.	
FP Sales	The monetary value of all fixed period sales.	Revenue Center Sales Comparison Transactions vs. Daily
Emp Sales	The monetary value of all employee sales.	Employee Sales Comparison Transaction vs. Daily
MI Sales	The monetary value of all menu item sales.	Menu Item Sales Comparison Transaction vs. Daily
FP Sales Var	The variances between daily sales and fixed period sales. The report does not normally show a value in this field.	

Column	Shows	Drill Down Report
Emp Var	The variances between daily sales and employee sales. The report does not normally show a value in this field.	
MI Sls Var	The variances between daily sales and menu item sales. The report does not normally show a value in this field.	
Sbttl Disc	The subtotal value of all discounts.	
Comp Disc	The monetary value of all comp discounts.	
Item Disc	The monetary value of all item discounts.	
Dly Chks	The total number of guest checks in one business day.	
FP Chks	The total number of guest checks in a fixed period.	
Open Chks	The total number of open guest checks.	

The Daily Labor Checklist shows all labor information organized by location, as described in the following table:

Column	Shows
Location	The name of the location.
TimeCard RegularHrs	The amount of regular hours worked by employees at the location.
TimeCard RegularPay	The amount of regular wages paid out to employees at the location.
TimeCard OverTimeHrs	The amount of overtime hours worked by employees at the location.
TimeCard OverTimePay	The amount of overtime wages paid out to employees at the location.
JobCode RegularHrs	The amount of regular job code hours worked at the location.
JobCode RegularPay	The amount of regular job code wages paid out at the location.
JobCode OverTimeHrs	The amount of overtime job code hours worked at the location.

Column	Shows
Job Code OverTimePay	The amount of overtime job code wages paid out at the location.

Revenue Center Sales Comparison: Transactions vs. Daily Report

The Revenue Center Sales Comparison: Transactions vs. Daily report compares transactions and daily revenue center sales, as described in the following table:

Column	Shows
Location Rev Cntr	A list of locations, then a list of revenue centers for each location.
FP Net Sales	The monetary value of all fixed period sales.
Daily Net Sales	The monetary value of daily sales.
Sales Variance	The variances between daily sales and fixed period sales.
FP Checks	The total number of guest checks in a fixed period.
Daily Checks	The total number of guest checks in one business day.
Check Variance	The difference between the number of fixed period checks and the number of daily checks.
FP Voids	The total number of voids in a fixed period.
Daily Voids	The total number of voids in one business day.
Void Variance	The difference between the fixed period voids and the number of daily voids.

Employee Sales Comparison: Transaction vs. Daily Report

The Employee Sales Comparison: Transactions vs. Daily report compares transactions and daily employee sales, as described in the following table:

Column	Shows
Location Employee	A list of locations, then a list of employees that work at each location.
Trans Net Sales	The net sales of all transactions.
Emp Dly Net Sales	The net sales for the employee.
Variance	The variances between transaction net sales and employee daily net sales.

Column	Shows
Trans Checks	The total number of all guest checks.
Emp Dly Checks	The total number of guest checks for the selected employee.
Var	The difference between the number of all checks and the number of checks for the employee.
Guests	The total number of guests for the employee.
Voids	The monetary value of voids for the employee.
Disc	The monetary value of discounts applied by the employee.
Srvc	The monetary value of service charges for the employee.

Menu Item Sales Comparison: Transaction vs. Daily Report

The Menu Item Sales Comparison: Transactions vs. Daily report compares transactions and menu item sales, as described in the following table:

Column	Shows
Location Menu Item	A list of locations, then a list of menu items sold at each location.
Transaction Sales	The monetary value of all transactions in a fixed period.
MI Daily Sales	The net sales of the menu item for the selected day.
Variance	The difference between all transaction sales and the menu item sales.
Item Discounts	The monetary value of discounts applied to the menu item.
Trans Count	The total number of transactions involving the menu item.
MI Daily Count	The total number of times the menu item as ordered on the selected day.
Variance	The difference between the number of all transactions and the number of transactions involving the menu item.
Return Count	The number of returns involving the menu item.

Daily Exceptions List Report

The Daily Exceptions List report shows the errors and exceptions that occurred at an organization, as described in the following table:

Column	Shows
Location	The location at which the exception occurred.
Business Date	The business day on which the exception occurred.
Dly sales	The daily sales for the business day.
FP Sales	The fixed period sales for the location.
FP Sls Var	The variance between the fixed period sales and the daily sales at the location.
Dly Chks	The daily checks at the location.
FP Chks	The fixed period checks at the location.

EMS Batch Status Report

The EMS Batch Status report shows the processing status of Enterprise Management System (EMS) batch reports, as described in the following table:

Shows	Column
The batch creation date.	Created Date
The batch processing status.	Status
The batch name.	Name
The batch publishing date.	Published Date
The batch owner.	Owner
The remote message to be displayed for the batch.	Remote Message

Posting Exceptions Report

The Posting Exceptions report shows the following data posting exceptions and error messages for the portal:

- SEV_WARNING
- SEV_DATAINCONSISTENT
- SEV_MISSINGRESULTSET
- SEV_ROWNOTFOUND
- SEV_ERROR

- SEV_FATAL

The report shows the exceptions counts per location, as described in the following table:

Column	Shows
Severity	A list of locations, then a list of posting exceptions generated for the location.
Exceptions Count	The number of exceptions or error messages that exist of the selected type for the location.

Labor Runtime Error Log Report

The Labor Runtime Error Log report shows errors that occurred when processing labor-related information, as described in the following table:

Column	Shows
Date and Time	The date and time of the labor runtime error.
Misc	The corresponding numeric assignment for the error message.
Message	The error message.

Last Posting Report

The Last Posting report shows the date and time of the last posting for each store location. The report also shows a list of jobs that have been queued and are ready for posting under **Current Posting Performance**.

The last posting information is shown as described in the following table:

Column	Shows
Location	A list of locations. This report segments posting information by the following times: <ul style="list-style-type: none"> • In the last 15 minutes • In the last 30 minutes • In the last hour • In the last 6 hours • In the last 12 hours • In the last 24 hours
Posting Time	The date and time the location last posted a job.
Job Name	The job or action that was performed.
Source	The source or origin of the job.
Version	The version used at the location.
Business Date	The business date the job was posted.

Column	Shows
Msg size (k)	The size of the message in kilobytes.
Result size (k)	The size of the result set in kilobytes.

Portal Log-on Report

The Portal Log-on report provides a log of all user logins, as described in the following table:

Column	Shows
Name	The user name that logged into the web application.
Last Logon	The date and time the user logged into the web application.

Portal Log-on Report Detail Report

The Portal Log-on Report Detail report provides a log of user actions within the web application as well as browser and internet settings, as described in the following table:

Column	Shows
Name	The user name being logged.
Date and Time	The date and time the user performed an action.
Log Info 1	The portlet accessed by the user.
Log Info 2	The actions performed by the user within the portlet.
Log Info 3	The user's browser and internet settings.

Portal Server Runtime Errors Report

The Portal Server Runtime Errors report shows all runtime errors that occurred in the web application, as described in the following table:

Column	Shows
Log Time	The date and time the error occurred.
Applet ID	The Java applet ID.
Message	The error message.
Misc	Any additional information that accompanies the error message.

Posting Server Runtime Errors Report

The Posting Server Runtime Errors report shows all runtime errors that occurred when posting information to reports, as described in the following table:

Column	Shows
Log Time	The date and time the error occurred.
Applet ID	The Java applet ID.
Message	The error message.
Misc	Any additional information that accompanies the error message.

Posting Report

The Posting report shows information regarding all data postings and compression of messages.

The Posting Date section shows aggregate posting information by date, as described in the following table:

Column	Shows	Drill Down Report
Posting Date	A list of business days in which posting occurred.	Posting Date Detail
Posting Start	The starting date and time range for the information posted on the report.	
Posting End	The ending date and time range for the information posted on the report.	
Count of Msg	The number of messages posted.	
Msg Size (k)	The size of the messages in kilobytes.	
Result Size (k)	The size of the result set in kilobytes.	
Compress %	The percentage of the size compressed.	

The Business Date section shows posting information organized by location and date, as described in the following table:

Column	Shows	Drill Down Report
Business Date	A list of locations, then a list of business days in which posting occurred.	Business Date Posting Detail
Posting Start	The starting date and time range for the information posted on the report.	
Posting End	The ending date and time range for the information posted on the report.	
Count of Msg	The number of messages posted.	
Msg Size (k)	The size of the messages in kilobytes.	
Result Size (k)	The size of the result set in kilobytes.	
Compress %	The percentage of the size compressed.	

Posting Date Detail Report

The Posting Date Detail report shows posting job details for each location, as described in the following table:

Column	Shows
Location	A list of locations.
Posting Time	The date and time for the posted transaction.
Job Name	The name of the job.
Source	The source or origin of the job.
Version	The version being used at the location.
Msg Size (k)	The size of the messages in kilobytes.
Result Size (k)	The size of the result set in kilobytes.
Compress %	The percentage of the size compressed.

Business Date Posting Detail Report

The Business Date Posting Detail report shows posting job details for one location and one business day, as described in the following table:

Column	Shows
Location	The selected location.
Posting Time	The selected business day, and the times with a posted transaction.
Job Name	The name of the job.
Source	The source or origin of the job.
Version	The version being used at the location.
Msg Size (k)	The size of the messages in kilobytes.
Result Size (k)	The size of the result set in kilobytes.
Compress %	The percentage of the size compressed.

VAT Comparison Report

The VAT Comparison report compares Value Added Tax (VAT) information for locations and for the organization.

The Tax Summed section shows aggregate VAT information by tax and menu items, as described in the following table:

Column	Shows
Tax Total	The tax total for all taxes, then the tax total for each tax type.
Tax Name	A list of taxes.
Taxable Sales	The total of all taxable sales, then the taxable sales for each tax type.
Taxexemption Sales	The total of all tax-exempt sales, then the tax-exempt sales for each tax type.
SalesNetVat	All sales after including VAT, then all sales after including VAT for each tax type.
Menu Item FP Summed	The Menu Item FP Summed row shows totals for menu item sales in a fixed period.
Menu Item Daily Total Summed	The Menu Item daily Total Summed row shows totals for menu item sales in a business day.
Item VAT + Disc VAT	The sum of the Item VAT and the Discount VAT.
Item VAT	The total value of menu item VAT.
Disc VAT	The total value of discounts affected by VAT.
Discount Total	The total value of discounts.

Column	Shows
Gross b4 Disc	The gross amount before being adjusted by discounts.
SalesNetVat	The total amount of sales affected by VAT.

The By Location section shows VAT information for each location, as described in the following table:

Column	Shows
Location	A row for the organization, then a list of locations, then a segmentation of the location for each tax type.
Tax Total	The tax total for each location.
Tax Name	A list of taxes.
Taxable Sales	The total of all taxable sales, then the taxable sales for each tax type.
Taxexemption Sales	The total of all tax-exempt sales, then the tax-exempt sales for each tax type.
SalesNetVat	The total amount of sales affected by VAT.

VAT Report Menu Item Report

The VAT Report Menu Item report shows the Value Added Taxes (VAT) total for menu items, as described in the following table:

Column	Shows
VAT Total	A list of VAT Totals for menu items.

VAT Report MenuItem FixedPeriods Report

The VAT Report MenuItem FixedPeriods report shows the Value Added Taxes (VAT) total for menu items in a fixed period, as described in the following table:

Column	Shows
VAT Total	A list of VAT Totals for menu items in a fixed period.

VAT Report Tax Report

The VAT Report Tax report shows Value Added Tax (VAT) information for each tax type, as described in the following table:

Column	Shows
Tax Name	A list of tax types.
Tax Total	The total tax collected for each type.
Taxable Sales	The total value of taxable sales for each type.
Tax Exemption Sales	The total value of sales exempt from the tax type.

Reporting on Import and Export

The following report provides information on imports and exports established by the organization:

- [Import Export Log Report](#)
[Import Export Log Report](#)

Import Export Log Report

The Import Export Log report shows information regarding import and export transactions, as described in the following table:

Column	Shows
Location	The location executing the transaction.
Bus Date	The business date of the transaction.
Name	The name of the transaction.
Exec Date	The execution date of the transaction.
Type	The transaction type.
Stat	The transaction status.
Description	A status description.
Man. Init	Whether the transaction was started manually or automatically: <ul style="list-style-type: none">• Yes: manual start• No: automatic start
FileName	The name of the transaction file.
Destination	The e-mail address for the transaction.

Reporting on Cash Management

The following reports provide information on the location, flow, and activity of cash in the restaurant:

- [Safes Report](#)
- [Till Report](#)
- [Bank Deposit Report](#)
- [Count Adjustments Report](#)
- [Starting Amount Adjustments Report](#)
- [Over/Short Report](#)
- [Paid-In/Paid-Out Report](#)
- [Server Bank Report](#)
- [Bank Deposit Adjustments Report](#)
- [Petty Cash Report](#)
- [Cash Management Activity Report](#)

[Safes Report](#)

[Till Report](#)

[Bank Deposit Report](#)

[Count Adjustments Report](#)

[Starting Amount Adjustments Report](#)

[Over/Short Report](#)

[Paid-In/Paid-Out Report](#)

[Server Bank Report](#)

[Bank Deposit Adjustments Report](#)

[Petty Cash Report](#)

[Cash Management Activity Report](#)

Safes Report

The Safes Report shows an overview of the safe receptacles and their activities for the business date that you select. You can use this report to determine the current cash value of any money regardless of the defined currency within the safe.

Column	Shows	Drill Down Report
Location	The location name.	
Revenue Center	The revenue center name.	
Safe Name	The names of the safe receptacles belonging to the revenue center.	
Session	The session ID.	Cash Management Activity Report
Status	The session status: <ul style="list-style-type: none"> • Open • Closed 	
Currency	The currency type.	
Deposited	The total amount deposited.	Deposit Activity Report
Balance	The total amount remaining in the safe at the end of the business day.	

Till Report

The Till Report shows an overview of the till sessions and their activities for the business date that you select. You can use this report to determine the value of any activity that took place within the till session regardless of the defined currency.

Column	Shows	Drill Down Report
Location	The location name.	Cash Management Activity Report
Revenue Center	The revenue center name.	Cash Management Activity Report
Till Name	The names of the tills belonging to the revenue center.	Cash Management Activity Report
Status	The session status: <ul style="list-style-type: none"> • Open • Closed 	Cash Management Activity Report
Session	The session ID.	
Workstation/Drawer	The workstation and drawer IDs, then the date, open time, and close time of the till session.	

Column	Shows	Drill Down Report
Currency	The currency type.	
Starting Amount	The total amount in the receptacle at the start of the business day. A list of employees that counted and verified the starting amount, and the employee who performed the last count.	
Balance	The expected amount in the receptacle based on the transaction activities.	
Pulled	The total amount withdrawn from the receptacle.	
Counted	The total amount remaining in the receptacle at the end of the day.	
Variance	The difference between the expected amount and the counted amount in the receptacle. (Counted - Balance)	
Deposited	The total amount deposited.	Deposit Activity Report

Bank Deposit Report

The Bank Deposit Report an overview of the active bank deposits for the business date that you select and their activities.

Column	Shows	Drill Down Report
Location	The location name.	Cash Management Activity Report
Revenue Center	The revenue center name.	Cash Management Activity Report
Bank Name	The bank names, then a list of deposit session IDs.	Cash Management Activity Report
Status	The session status: <ul style="list-style-type: none"> • Open • Closed 	
Reference	The open and close date and times for the session, then the employee responsible for opening and closing the session.	

Column	Shows	Drill Down Report
Currency	The currency type.	
Deposit Amount	The total amount deposited.	

Count Adjustments Report

The Count Adjustments Report shows an overview of count adjustments for the business date that you select. You can use this report to determine the value of any adjustment activity that took place on a receptacle. The accepted receptacles are till, safe, server bank, and petty cash.

Column	Shows	Drill Down Report
Location	The location name.	
Revenue Center	The revenue center name.	
Receptacle	The names of the receptacles.	
Type	The receptacle type: <ul style="list-style-type: none">• Till• Safe• Bank• Petty cash	
Class	The cash management class.	
Session	The session ID.	Cash Management Activity Report
Currency	The currency type.	
Adjustment	The difference between the original count and the new count.	
Reference	The count reference.	
Reason	The reason for making the adjustment.	

Starting Amount Adjustments Report

The Starting Amount Adjustments Report shows an overview of starting amount adjustments for the business date that you select. You can use this report to determine the value of any starting amount adjustment activity that took place on a receptacle. The accepted receptacles are till and server bank.

Column	Shows	Drill Down Report
Location	The location name.	
Revenue Center	The revenue center name.	

Column	Shows	Drill Down Report
Receptacle	The names of the receptacles.	
Type	The receptacle type: <ul style="list-style-type: none"> • Till • Safe • Bank • Petty cash Then the session ID.	Cash Management Activity Report
Org. Starting Amount	The original amount in the receptacle at the start of the business day, then the reason for adjustment.	
Starting Amount	The revised amount in the receptacle at the start of the business day.	
Adjustment	The difference between the original count and the new count. (Starting Amount - Org. Starting Amount)	

Over/Short Report

The Over/Short Report shows an overview of the counts that are greater or less than the value predicted for the business date that you select based on transaction activities. You can use this report to determine the value of any over or short activity reported for a receptacle.

Column	Shows	Drill Down Report
Location	The location name.	
Revenue Center	The revenue center name.	
Receptacle	The names of the receptacles.	
Counted By	The employee that counted and verified the amount in the receptacle.	
Type	The receptacle type: <ul style="list-style-type: none"> • Till • Safe • Bank • Petty cash Then the session ID.	
Session ID	The session ID.	Cash Management Activity Report

Column	Shows	Drill Down Report
Workstation/Drawer	The workstation and drawer IDs.	
Currency	The currency type.	
Over/Short	The amount over or short of the predicted amount in the receptacle.	
Reason	The reason for the variance in amount.	

Paid-In/Paid-Out Report

The Paid-In/Paid-Out Report shows paid-in and paid-out transactions for the date that you select. You can use this report to see transaction information for paid-in and paid-out activities reported for a receptacle. The accepted receptacles are safe, till, server bank, and petty cash.

Column	Shows	Drill Down Report
Location	The location name.	
Revenue Center	The revenue center name.	
Receptacle	The names of the receptacles.	
Employee	The employee that performed the transaction as well as the following details: <ul style="list-style-type: none"> Account/Vendor: The general ledger accounting information associated with the transaction and the vendor to whom money is paid in or paid out. Acct/Vndr Code: The account number and the vendor reference code. Invoice Num/Date: The invoice number and date of the transaction. Notes: Any additional notes for the transaction. 	
Type	The receptacle type: <ul style="list-style-type: none"> Till Safe Bank Petty cash Then the session ID.	
Session	The session ID.	Cash Management Activity Report

Column	Shows	Drill Down Report
Reference	The count reference.	Cash Management Activity Report
Currency	The currency type.	
Reason	The reason for the transaction.	
Total Amount	The total amount withdrawn from or deposited to the receptacle.	

Server Bank Report

The Server Bank Report shows an overview of server bank sessions for the employees that logged into the workstation for the business date that you select. You can use this report to determine the value of any activity that took place within the server bank session regardless of the defined currency.

Column	Shows	Drill Down Report
Location	The location name.	
Revenue Center	The revenue center name.	
Employee	The employee name.	
Session	The session ID.	Cash Management Activity Report
Status	The session status: <ul style="list-style-type: none"> • Open • Closed 	Cash Management Activity Report
Reference	The count reference.	
Currency	The currency type.	
Starting Amount	The amount in the receptacle at the start of the business day.	
Balance	The total amount remaining in the safe at the end of the business day.	
Counted	The total amount remaining in the receptacle at the end of the day.	
Variance	The difference between the expected amount and the counted amount in the receptacle. (Counted - Balance)	

Column	Shows	Drill Down Report
Deposited	The total amount deposited.	Deposit Activity Report

Bank Deposit Adjustments Report

The Bank Deposit Adjustments Report shows an overview of item adjustments for the business date that you select. You can use this report to determine the values of any adjustment activity that took place on a bank deposit receptacle.

Column	Shows	Drill Down Report
Location	The location name.	Cash Management Activity Report
Revenue Center	The revenue center name.	Cash Management Activity Report
Bank Name	The bank name and session ID.	Cash Management Activity Report
Type	The receptacle type: <ul style="list-style-type: none">• Till• Safe• Bank• Petty cash	
Class	The cash management class.	
Org. Amount	The original amount in the receptacle.	
Amount	The amount in the receptacle after the adjustment.	
Adjustment	The difference between the original amount and the new amount. (Amount - Org. Amount)	
Reason	The reason for making the adjustment.	

Petty Cash Report

The Petty Cash Report shows an overview of petty cash receptacles and their activities for the business date that you select. You can use this report to determine the current cash value of any money, regardless of the defined currency within the petty cash receptacles.

Column	Shows	Drill Down Report
Location	The location name.	
Revenue Center	The revenue center name.	

Column	Shows	Drill Down Report
Petty Cash	The names of the petty cash receptacles belonging to the revenue center.	
Session	The session ID.	Cash Management Activity Report
Status	The session status: <ul style="list-style-type: none"> • Open • Closed 	
Currency	The currency type.	
Balance	The total amount remaining in the petty cash receptacle at the end of the business day.	

Cash Management Activity Report

The Cash Management Activity Report provides a chronological list of transactions on a receptacle session for the business date that you select. You can use this report to track the flow of cash in and out of the receptacle.

Column	Shows	Drill Down Report
Location	The location name.	
Revenue Center	The revenue center name.	
Receptacle	The names of the safe receptacles belonging to the revenue center.	
Activity Type	The type of activity, such as: <ul style="list-style-type: none"> • Open • Closed • Adjustment • Transfer 	
Time	The time of the transaction.	
Type	The receptacle type.	
Employee	The employee that performed the transaction.	
Session ID	The session ID.	Session ID Activity Report
Audit Ref	A list of source of target session IDs.	Session ID Activity Report
Class	The cash management class.	
Amount	The value of the transaction.	

Column	Shows	Drill Down Report
Activity Details	Any additional details regarding the transaction.	
Balance	The total amount remaining in the receptacle.	

Building Custom Reports in Microsoft Excel

iQuery is an add-in that enables you to build custom queries in Microsoft Excel. When you build a query, you select data that appears in a Microsoft Excel spreadsheet after you run the query.

You can save the queries in Microsoft Excel or you can save them as reports. When you save a query as a report, users assigned to the custom reports role can run the reports from the Reporting and Analytics web application.

[Installing iQuery](#)

[Building a Query](#)

Installing iQuery

1. Close Microsoft Excel if it is open.
2. Go to the Reporting and Analytics home page, click **LINKS**, and then click **iQuery**.
3. Click **Install MICROS iQuery - Office 2007+** and then save `iQuerySetup.exe` to a temporary location on your computer.
4. Double-click the `iQuerySetup.exe` file and then follow the prompts to install the software.
5. Validate the installation:
 - a. Open Microsoft Excel.
 - b. Locate the iQuery plug-in, and then open iQuery.

The location varies depending on the version of Microsoft Excel. For example, in Microsoft Excel 2013, access iQuery from the **ADD-INS** ribbon.

- c. Log in to iQuery.

Building a Query

1. Select a query subject.
2. Select the column data that you want to appear in the spreadsheet after you run the query.

For numerical data marked with an asterisk, you can apply mathematical calculations by selecting an operation. For example, you select **Operations Daily Total** as the subject and then you select the **Check Closed Total** column. To add all the values in the spreadsheet column when you run the query, select **Sum** from the **Operation** drop-down list.

Use the up and down arrows to adjust the order of the columns in the spreadsheet. For example, if you move a column to the top of the list, that column is the first column in the spreadsheet.

3. In the **Filters** node on the dialog box window, select a filter and then select options to further refine query results.

The filters that appear depend on the subject that you select. For example, for most menu item subjects, you can filter by category groups and family group.

4. In the **Sort Orders** node, define the order in which iQuery sorts the data.
5. Click **Preview** to verify the query returns expected results.

Change query settings and preview the query again to fine-tune the query results.

6. Click **Run** to show the results in a Microsoft Excel spreadsheet.
7. Save the query.

To save the query on your computer so you can run it at a later time from Microsoft Excel, click **Query**.

To save the query as a report, click **Report**. Users assigned to the custom reports role can run the report from the Reporting and Analytics web application.

Building Interactive Reports

Interactive Reports enable you to build custom reports and view them in real time. The report updates as you drag and drop data fields onto the canvas. You can save and publish Interactive Reports and you can configure Reporting and Analytics to send them in report emails.

[Creating Interactive Reports](#)

[Modifying and Deleting Interactive Reports](#)

[Publishing Interactive Reports](#)

Creating Interactive Reports

1. In the side menu on the Reporting and Analytics home page, click **Interactive Report**.

Your system administrator configures the link to appear in the **Reports** section or **LINKS** section.

2. Click **Create New Interactive Report**, and then click the report type.
3. Double-click **Untitled** and then type a report name.
4. Drag data fields to the canvas.

To add a data field as a column header, drag the field to the column bar. A vertical line appears to indicate you are creating a column header.

To add a data field as a group header, drag the field above the column bar. A horizontal line appears to indicate you are creating a group header.

To reorganize fields, drag them to their new location on the canvas or click  and then drag them to their new location in the **Columns** field.

To rename a field, double-click it on the canvas and then type the new name.

To remove a data field, click it and then drag it to the trash can.

5. To format data fields, click the **Formatting** tab and then specify format settings.

The options that appear vary by field type. Press and hold the **Ctrl** key to select and format multiple fields.

6. To change general preferences such as the report template and page setup, click the **General** tab and then specify the settings.

7. To define filters that limit data in the report:
 - a. Click the filter icon () on the tool bar, and then drag a field from the canvas to the **Filters** box.
 - b. Specify filter conditions and parameters.
 - c. Click **OK**.

To remove a filter, click the filter icon, and then click .

To edit a filter, click the filter icon, and then click .
8. To sort report data:
 - For group headers, under **Group Sorting** on the Data tab, click the drop-down list for that header, and then select **Ascending** or **Descending**.
 - For column headers, right-click on a column, select **Sort**, and then select **Ascending**, **Descending**, or **None**. Selecting **None** removes the previous sort option.
9. Click **Save**, enter the report name, and then click **OK**.
10. To generate the report, click the **Export** icon () on the tool bar, and then select the output type.

Modifying and Deleting Interactive Reports

1. Click **Reports**, and then select **Interactive Reporting**.
2. Select **Modify/Delete Interactive Reports**.
3. To find a report:
 - Click **Find All** to show all saved Interactive Reports.
 - Enter the search criteria for a specific report, and then click **Find**.
4. Click **Next** and **Previous** to navigate through the search results, if applicable.
5. Click the report.
6. To modify a report, click **Edit**. See [Creating Interactive Reports](#) for details on modifying the report's data fields.
7. To delete a report, click **Delete**, and then click **OK** twice.

Publishing Interactive Reports

1. Click **Reports**, and then select **Interactive Reporting**.
2. Click **Publish Interactive Reports**.
3. To find a report:
 - Click **Find All** to show all saved Interactive Reports.
 - Enter the search criteria for a specific report, and then click **Find**.
4. Click **Next** and **Previous** to navigate the search results, if applicable.
5. Click the report.
6. To view the list of roles and users assigned to the report, click **Publish To**.
7. Click **Publish** at the top of the screen.
8. Enter a new **Name** for the report, if applicable.
9. Enter a **Description** for the report.
10. Click **By Role** or **By User**.
11. Select the role or user, and then click >> to move the selection to the panel.
12. Click **Save**, and then click **OK**.

Retrieving Guest Check Information

Oracle Hospitality Reporting and Analytics Advanced enables you to retrieve high-level guest check information and transaction-level information from the system.

To retrieve high-level information, use Check Query to retrieve basic check information. For example, you can search for check totals less than \$10.00 for a date range from a specific location.

To retrieve transaction-level information, use Audit & Analysis to query the system. Audit & Analysis enables you to build custom queries by applying filters. You can use the query results to identify trends that require research, such as a high number of error corrections or voided transactions. The following table describes the Audit & Analysis queries you can create. Your role or user type determines the queries you can create.

Type	Description
Transaction Detail	Retrieves transaction-level data. For example, you can query transactions for specific menu item purchases at a location.
Transaction Summary	Retrieves summary-level data. For example, you can query transactions for a tender media type such as credit card purchases for a customer.
Non-Check Transaction	Retrieves data for non-check transactions. For example, you can query training transactions for workstations at a location.
Authorization	Retrieves data for transactions that require authorization. For example, you can query voided service charges from a round for a revenue center.

[Retrieving Information with Check Query](#)

[Retrieving Transaction Information with Audit & Analysis](#)

[Exporting Audit & Analysis Queries](#)

Retrieving Information with Check Query

1. On the Oracle Hospitality Reporting and Analytics home page, click **Check Query**.
2. Specify the search criteria.

3. Click **Search**.

Retrieving Transaction Information with Audit & Analysis

1. In the **Reports** section, click **Audit & Analysis**.
2. In the **Create New Queries** section, click the query type.

For example, click **Transaction Detail** to build a query based on specific transaction details such as menu items. Your role and user type determines the queries you can create.
3. Click **Locations** at the top of the page and then select the location.
4. Click **Business Dates** and then select dates:
 - a. To use a fiscal calendar, select **Financial**. Contact your system administrator to verify your organization uses a fiscal calendar.
 - b. To use a pre-defined date or date range, select it from the **Quick Select** drop-down list.
 - c. Select the year.
 - d. To select dates from the calendar grid:
 - Click a single day.
 - Click the month name to select all the days in the month.
 - Click the day column header to select all those days in the month.
 - Click the numbered week to select all the days in that week.
 - Press and hold the **Ctrl** key to select multiple days.
5. Click **Filters** and then specify criteria to limit the query to a useful set of results, as described in the following table:

Filter	Description
Item Types	Filters by discounts, menu items (Transaction Detail only), service charges (Transaction Detail only), and tender media associated with the check.
General	Filters by general transaction information. The query type determines the general criteria you can define.
Workstation (Transaction Detail only)	Filters results by checks generated from workstations at locations.

Filter	Description
Day Parts	Filters by checks generated during parts of a day configured for your organization. Examples of day parts include breakfast, lunch, dinner, and late night. You can also select 15-minute intervals within an hour.
Order Types	Filters by order types configured for your organization.
Revenue Centers	Filters by revenue center. For example, you can filter on guest check transactions from the bar or restaurant.
Customer (Transaction Summary only)	Filters by customer information associated with transactions. For example, you can filter by the name on the credit card a customer used for the transaction.
Employee	Filters by employee information associated with transactions. For example, you can filter by all transactions for check employee Brian Smith.
Tax (Transaction Summary only)	Filter by tax information associated with transactions.

6. Click **Format** and define query output settings:

- a. Select the output type.
- b. To show location-specific names of menu items, tender and media, discounts, and service charges in the query, select **Use location names rather than master names**.

Clearing this option shows the names from the master definition table.

- c. Select the columns that appear in the query and then define how the column data appears in the query.

For example, you can group data by revenue center in ascending order. To apply a mathematical operation, select the operation from the **Function** column.

7. Click **Run** to run the query.

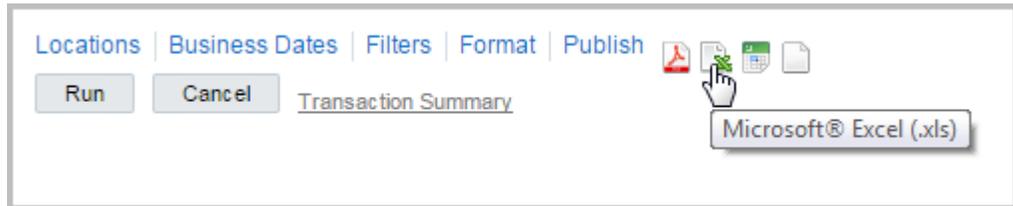
8. Click **Publish** to save the query and make it available to other users:

- a. Type a name and description for the query.
- b. On the **Publish To** tab, specify if the members of a role or specific users can run the query.
- c. On the **Prompted Filters** tab, select the filters that other users can set when running the published query.
- d. Click **Save**.

The query appears in the **Public Queries** section on the Audit & Analysis page.

Exporting Audit & Analysis Queries

1. Build and run an Audit & Analysis query or run a published query.
2. Click the export format icon as shown in the following example:



Scheduling Reports for Email Distribution

Oracle Hospitality Reporting and Analytics Advanced enables you to define schedules for sending reports by email to members of a role or specific users. You can configure Reporting and Analytics to send standard reports, Audit & Analysis reports, iQuery reports, and interactive reports.

[Creating Report Emails](#)

Creating Report Emails

1. In the side menu on the Reporting and Analytics home page, click **LINKS** and then click **Report Mail**.
2. On the **Report Mail Administration Menu** page, click **Report Mail**.
3. Click **Add**.
4. On the **Content** tab, specify email content as described in the following table:

Setting	Description
Type	Select the report type.
Report Selection	Select the report. For long lists of reports, specify search criteria to locate the report.
Preferences	Specify delivery preferences. The report type you select determines the preferences that appear. If you select multiple locations, Reporting and Analytics sends one report for each location. If you select Consolidated , Reporting and Analytics sends aggregate report data for all locations in one email. Reporting and Analytics sends each report in a separate email. If you select Zip multiple files , Reporting and Analytics sends one mail with a ZIP file containing the report files.

5. On the **Name** tab, specify email settings as described in the following table:

Setting	Description
Name	Type the name of the report email. The name identifies the report email in the Reporting and Analytics web application.
Description	Type a description of the report email. The description appears in the Reporting and Analytics web application.
Subject	Type a subject for the report email. The value appears in the subject line of the email sent to recipients.
Active	Clear the option to deactivate the report email. Reporting and Analytics saves the report email settings but does not send report emails.
Email When Error	Select to notify the system administrator of report email errors.

6. On the **Recipients** tab, select the email recipients.

If you select a specific user, and you want to send the email to more users, select **Additional recipient(s) emails** and then type the email addresses.

7. On the **Frequency** tab, specify the intervals Reporting and Analytics uses to send report emails.

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