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MIRUS

Restaurant Solutions

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Creating User Workflows

Terri Pham Gonzalez
Emily Duncan Tobar
Mirus Restaurant Solutions

planet hollywood™

About Me

Terri Pham Gonzalez

- With Mirus since 2012
- Crossfit coach in the evenings
- Top Chef on the weekends

Emily Duncan Tobar

- With Mirus since 2012
- Crazy Cat Lady
- Geek girl on the weekends

"Get closer than ever to your customers. So close that you tell them what they need well before they realize it themselves."

Steve Jobs,
Founder and Former CEO, Apple

Overview

1) Why you should help your users consume data more effectively. Why have a user workflow?

2) Provide user workflow examples

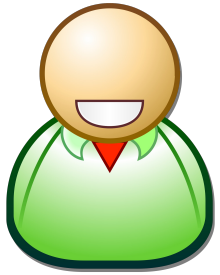
3) Best Practices: Using features to enhance your user workflows

4) Site Administrator tools and appropriate use cases for each

5) Self Evaluation: Questions you should be asking

Why User Workflow?

User Workflow Example: Day to Day Dashboard

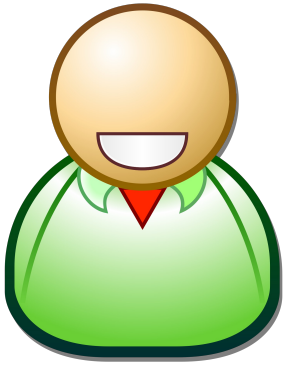


- Area Supervisor : Dale Porter

- Multiple Restaurants, each with Store Managers & Employees

- Dale reports to Zone Director

Recap: Day to Day Dashboard

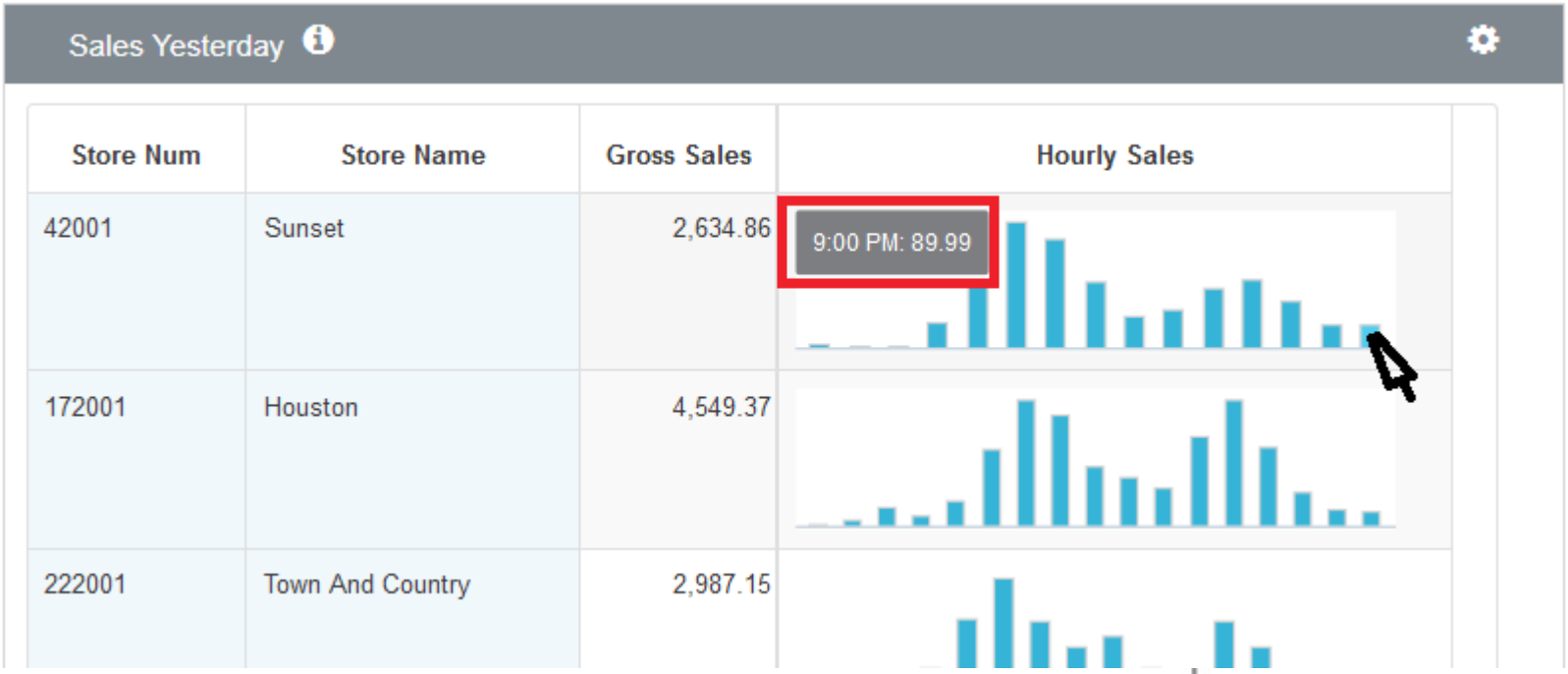


Actions for Area Supervisor : Dale Porter

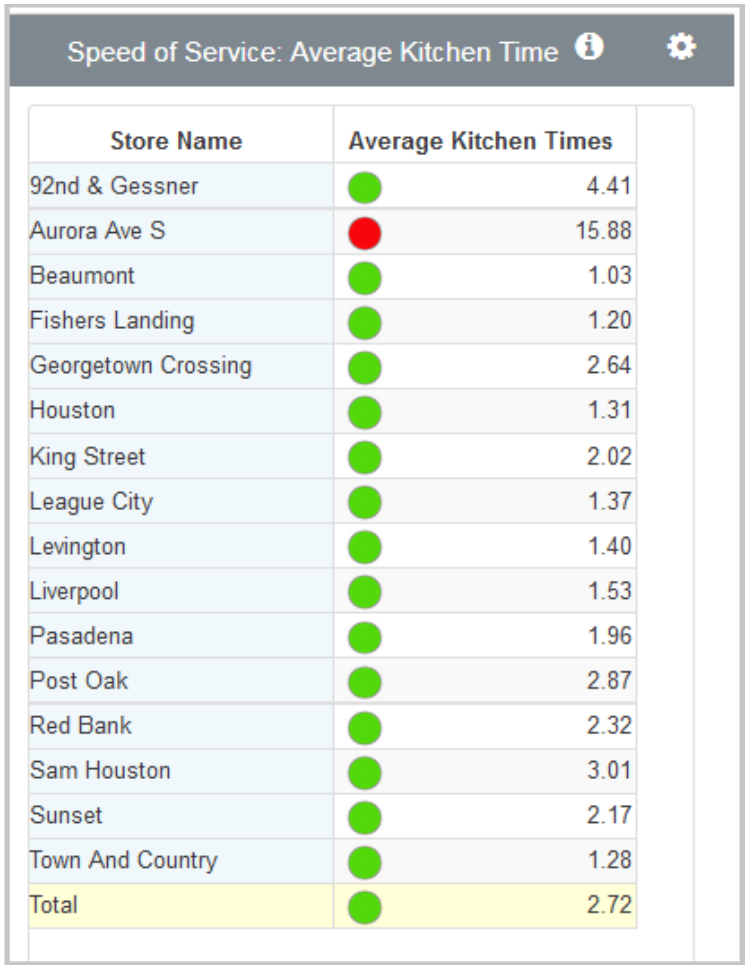
- Visit Sunset:
  - Good Job on $2600
  - Cash Over/Short
- Call Aurora Ave:
  - OT hours. What happened?
  - Kitchen Time = 15 minutes: What happened?
- Call Beaumont:
  - Cash Over/Short
  - Darci with Check less than $98
  - Low Check Average
- Leauge City: Amanda's $88 discount
- Levington: Rick's $119 discount

Features that Enhance User Workflow

- Visualizations: Sparklines & Charts



Features that Enhance User Workflow



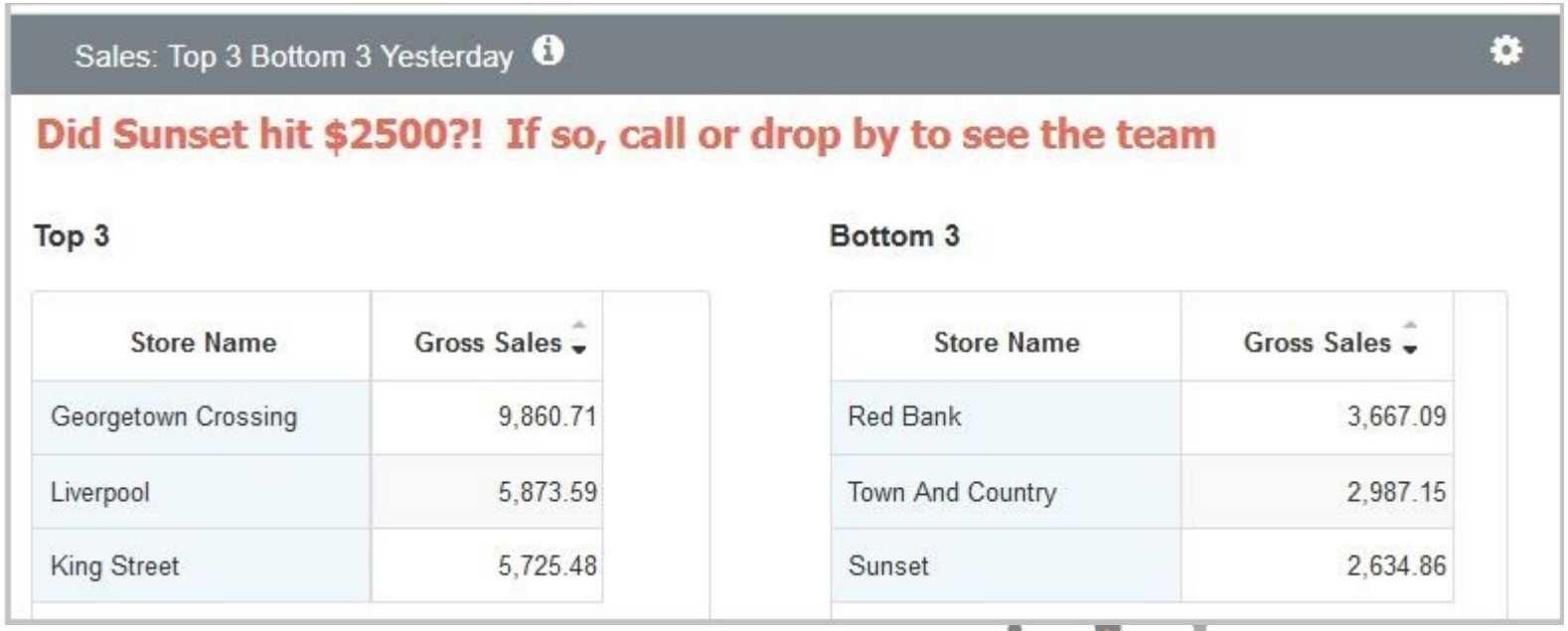
Speed of Service: Average Kitchen Time

Store Name	Average Kitchen Times
92nd & Gessner	4.41
Aurora Ave S	15.88
Beaumont	1.03
Fishers Landing	1.20
Georgetown Crossing	2.64
Houston	1.31
King Street	2.02
League City	1.37
Levington	1.40
Liverpool	1.53
Pasadena	1.96
Post Oak	2.87
Red Bank	2.32
Sam Houston	3.01
Sunset	2.17
Town And Country	1.28
Total	2.72

- Visualizations: KPI
- Key Performance Indicators

Features that Enhance User Workflow

- Top Bottom
- Report Descriptions



Sales: Top 3 Bottom 3 Yesterday

Did Sunset hit $2500?! If so, call or drop by to see the team

Top 3

Store Name	Gross Sales
Georgetown Crossing	9,860.71
Liverpool	5,873.59
King Street	5,725.48

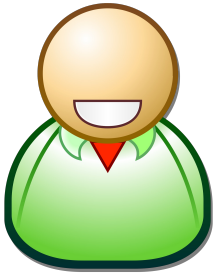
Bottom 3

Store Name	Gross Sales
Red Bank	3,667.09
Town And Country	2,987.15
Sunset	2,634.86

Features that Enhance User Workflow

- Sharing Reports and Dashboards to similar users
- Scheduled Alerts
- Mobile Reports
- Exporting to PDF, XLS, CSV
- Printing

User Workflow Example: Investigation Dashboard for One Store



- Area Supervisor : Dale Porter

- Store Manager Performance Review
- Employee Performance Review

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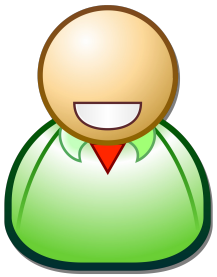
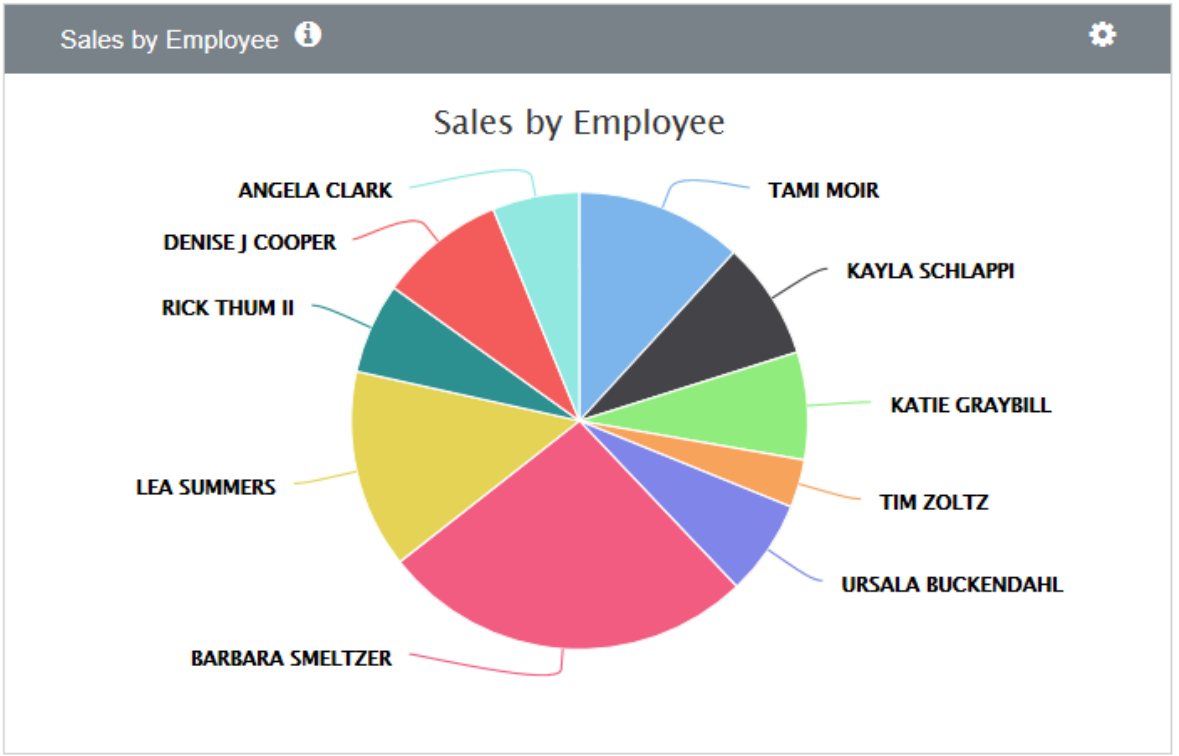


Area Supervisor : Dale Porter

- Server Ranking
- Pie Charts
- Time Switch Headers
- Store Filters



Site Admin Tools that Enhance User Workflows

Use Case for User Group

- User Groups can be created in Site Admin.
- User Groups allows you to quickly group people together to set permissions.
- Quick way to share reports, dashboards, and schedule alerts to multiple users.

Use Case for Security Set

- Security Set is a Site Admin permission function where you can limit a user to only see a certain store, market, area, or specific dimension on their reports, alerts, and dashboards.
- This is useful if you have users that should not be allowed to see other stores.

Use Case for Filter Set

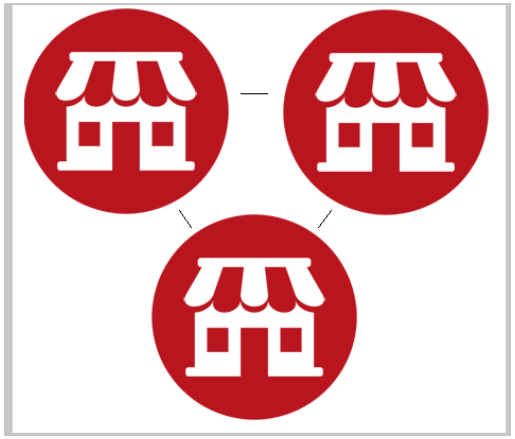
- Site Admin function that defines filters based on the user's permissions.
- Allows for more control with different types of report

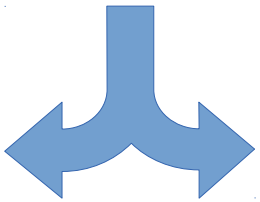
  (Company reports versus store reports)
- A user can have multiple Filter Sets

  *For Security Sets: only ONE Security set

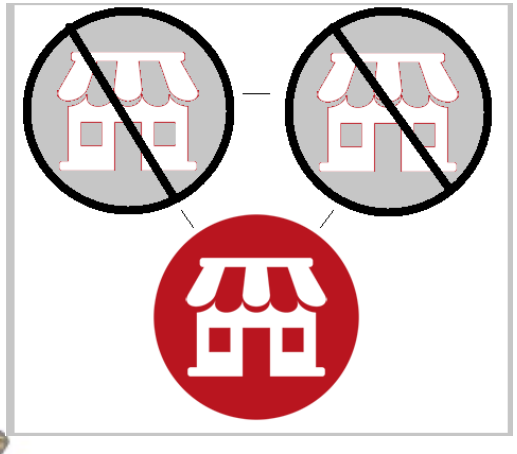
Use Case for Filter Set

Filter Set #1
(All Stores)

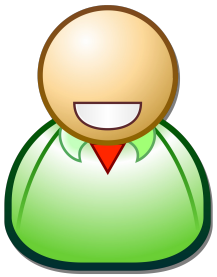




Filter Set #2
(Just ONE Store)



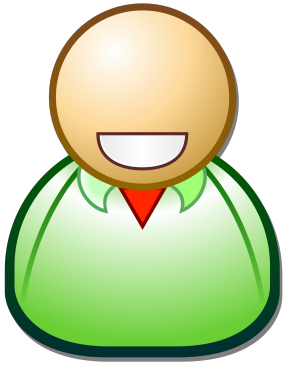
User Workflow Example: Trends Dashboard



Area Supervisor : Dale Porter

- Compare multiple restaurants
- Analyze Trends
- Monitor New Marketing Campaigns

Recap: Dashboard User Workflow



Area Supervisor : Dale Porter

- 3 Dashboards:
  - Day to Day
  - Investigation for one store
  - Trend
- Concise Reporting
- Action Driven

Self Evaluation of Your Own User Workflows

Self Evaluation of Your User Workflows:

1) Does your report or dashboard drive an action?

2) Can the user determine their action quickly?

a) Is the report concise?

b) Does the user have to spend more than 5 minutes to read the report?

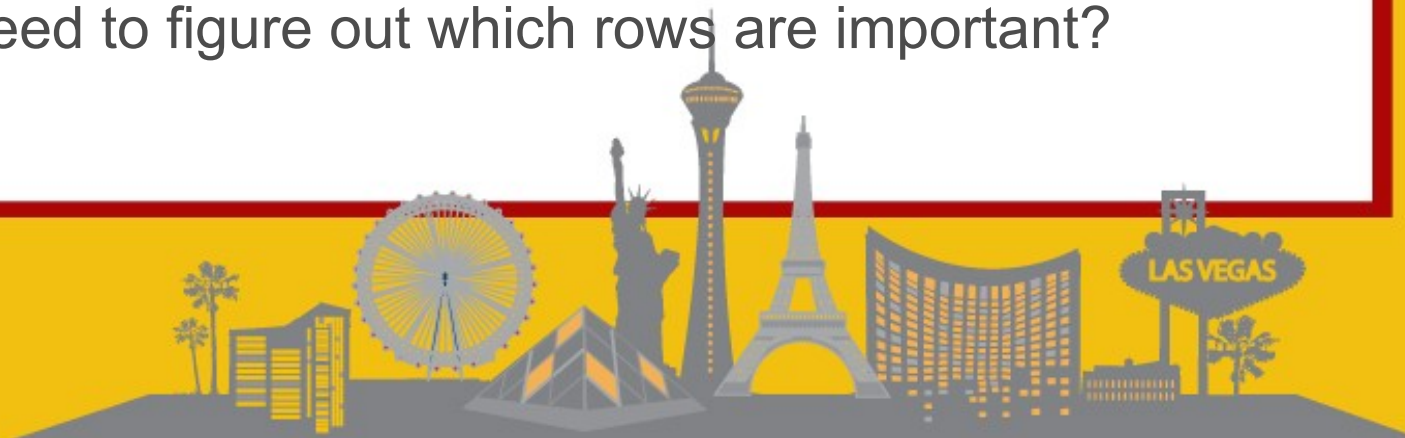
c) Is the report too complicated and cluttered?

3) Are you asking your user to do all the work?

a) Is the user doing the math?

b) Does the user need a calculator to read your report?

c) Does the user need to figure out which rows are important?



Self Evaluation of Your User Workflows:

4) Is the format and layout appropriate for the purpose of the report?

a) For a Mobile App report: Is it Mobile friendly?
Or is it 15 columns?

b) Do you use Visualization features:
Charting, KPIs, and/or sparklines?

5) Feedback from your Users

a) How often do you get feedback from your users?

b) Do you solicit their feedback?

c) What feedback have they told you before?

Q & A

Thank you for your time

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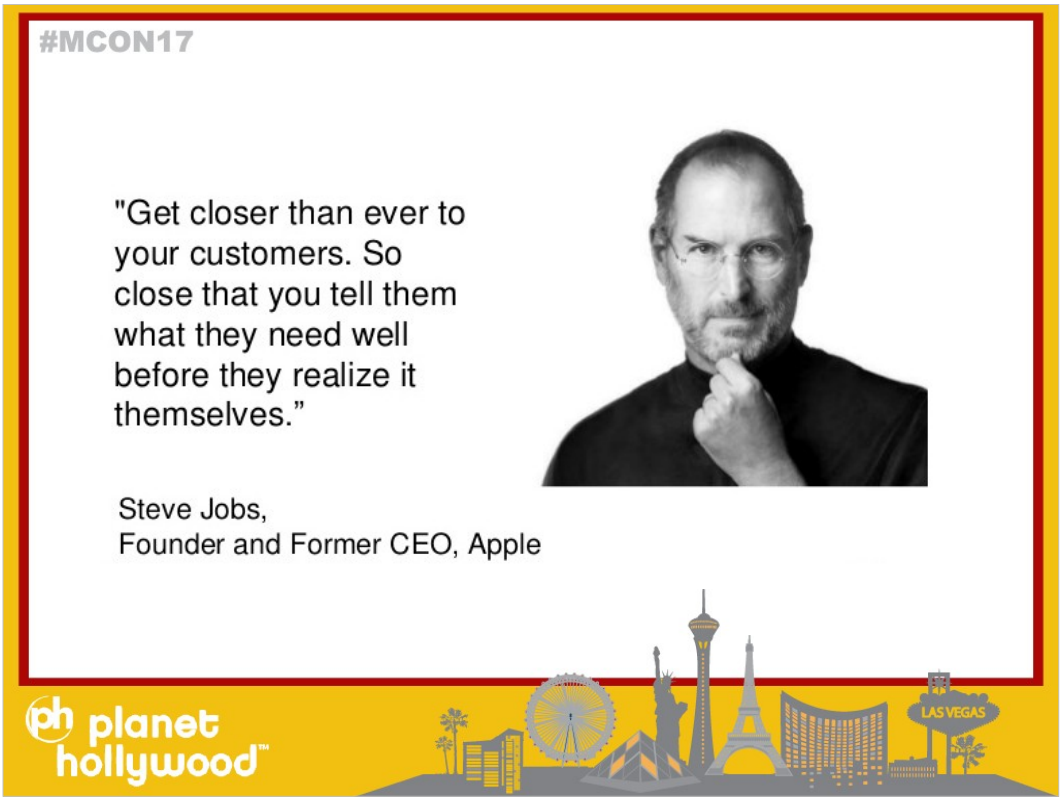
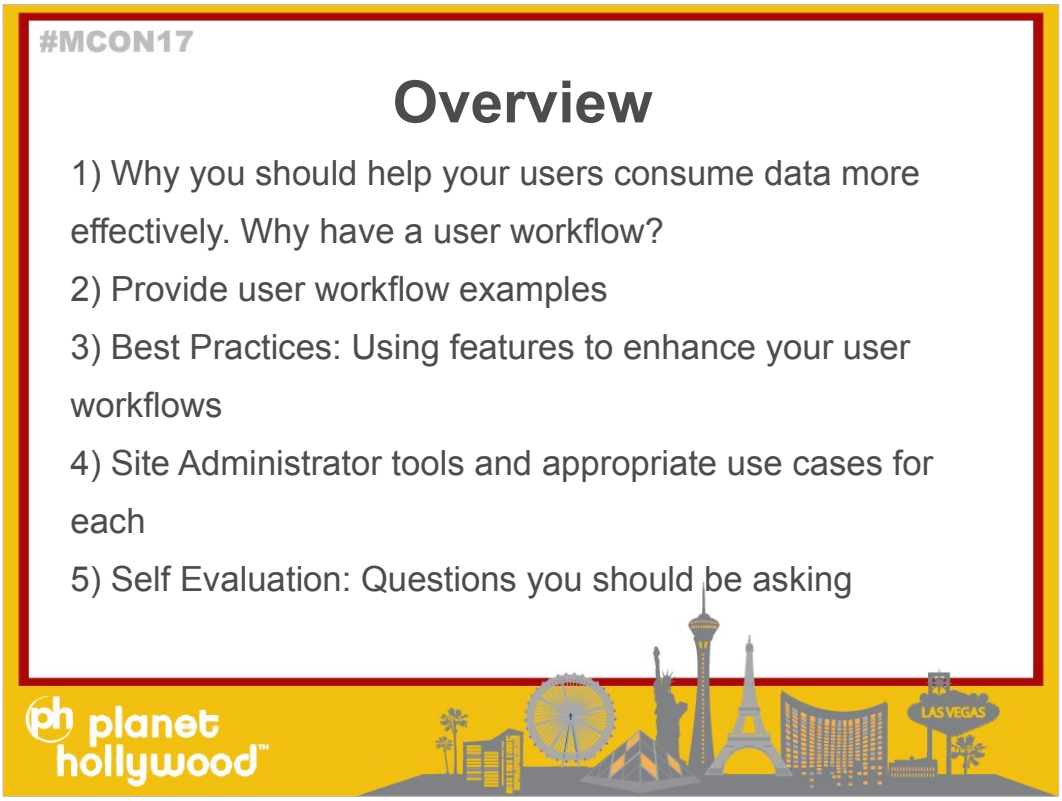


I have been with Mirus for over 5 years now so I have seen many examples of how companies manage data consumption among hundreds of users.

We came up with this training idea because we have noticed a huge trend with certain users that want to use Mirus to just recreate spreadsheets.

- I believe that is NOT what users truly want. Users want a workflow, they want structure and clear boundaries They just don't know how to ask for it.

- It's like the phone. Before, someone said, I NEED to have buttons to make a call. I NEED BUTTONS! Then Apple challenged that and said what if you had a phone that you can touch that could make the call for you. Or better yet, store the number or

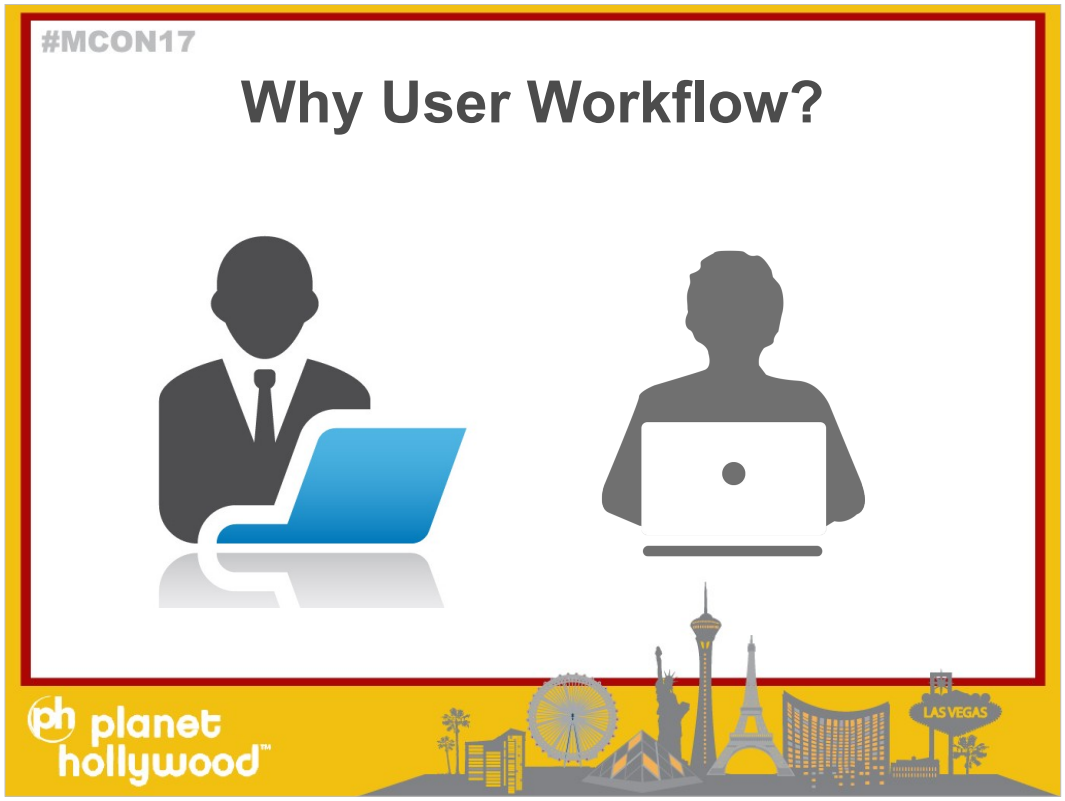


Most Mirus trainings are “How “ based
Click here to add a filter.
Click here to do this.

This training is more “why” based.

We will not be in the Edit pages.

Instead this is “Big Picture” training where I will put together the pieces for you to show you WHY user workflows is what your user really want.

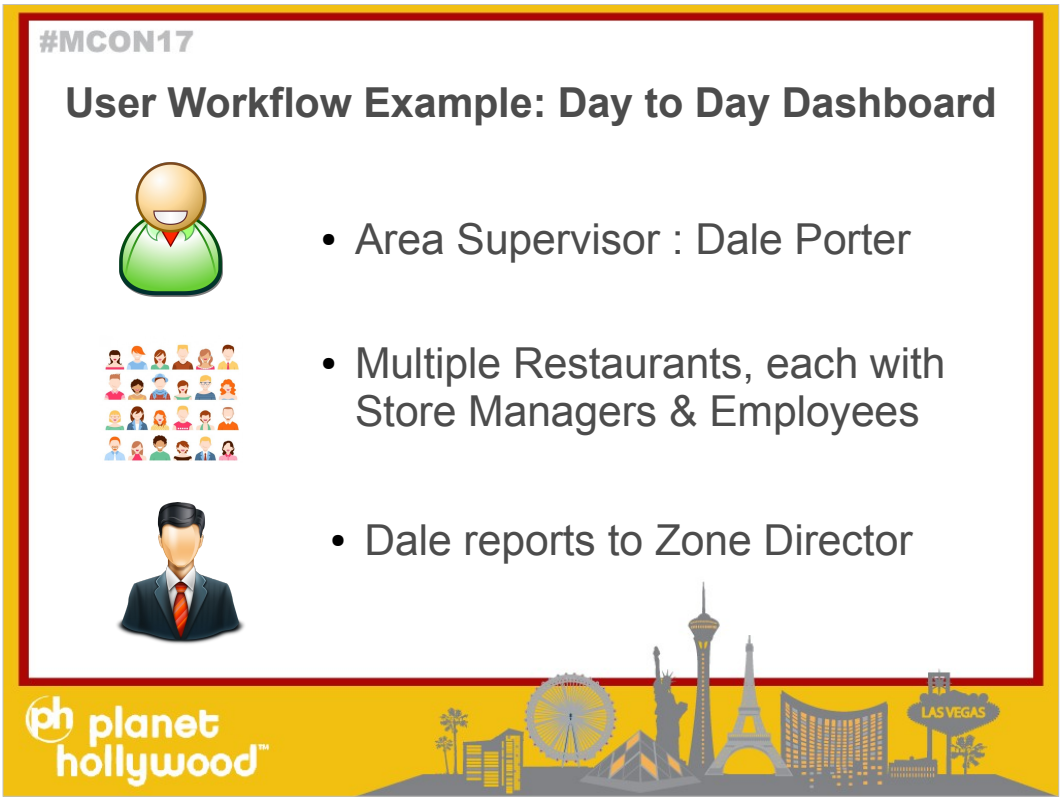


There are different users
- Some are comfortable with data analytics: these are the users who want EVERYTHING in one report so THEY can determine what is important
- then you have some users who need guidance with data

What is a User workflow?

- Generally speaking, a Workflow is a set of steps to reach the goal.
- Each workflow is different and is based on their position, their purpose, what is important to their department, and their confidence in technology

Even though you have different users: they really are the same in what they want.
→ both are limited in time.
→ Both can benefit from concise workflows.

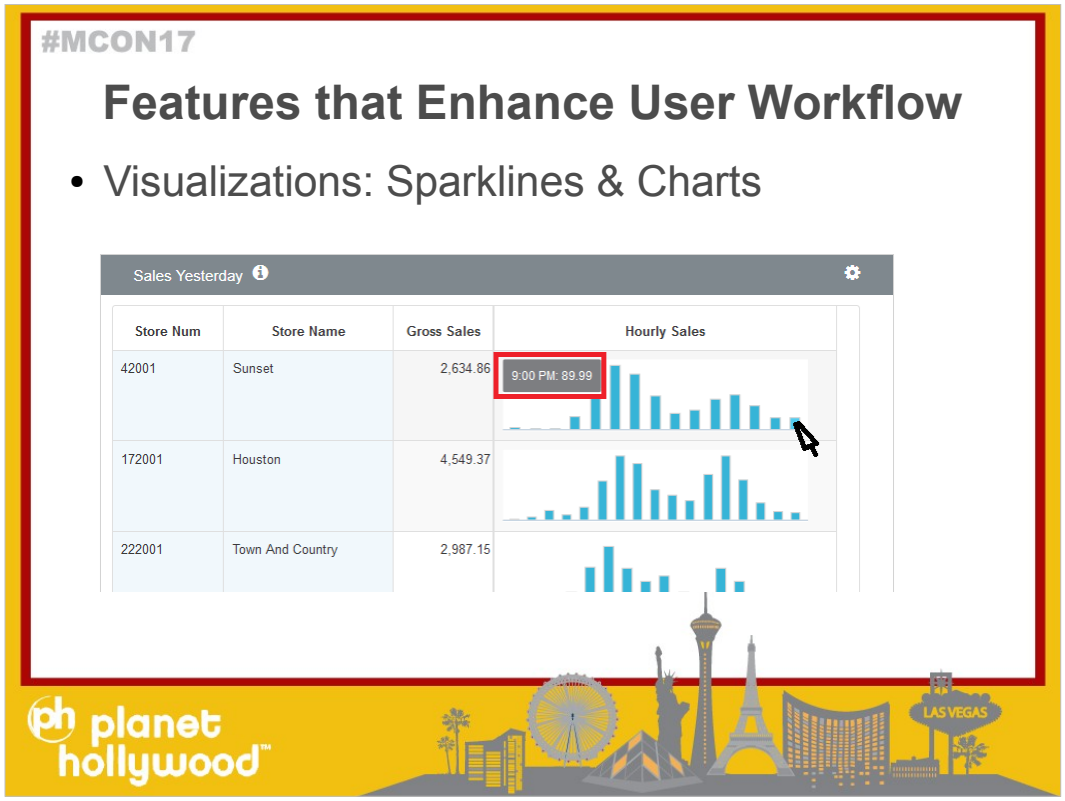


- There will be 3 Dashboard for dashboard user work flow
- 1) Day to day dashboard (everyday 10 -15 minutes)

- Example of the Day to Day Dashboard

- I will walk you through a pre-recorded video.
- ALT + TAB
- **To 6:38**

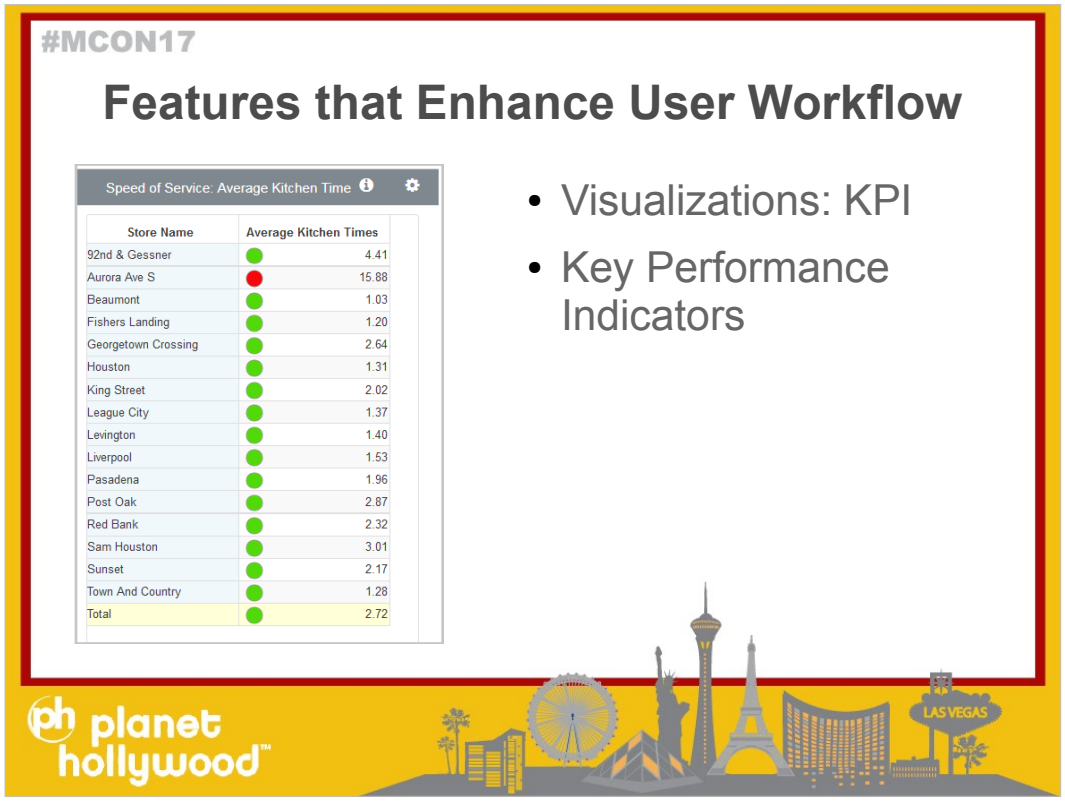
- Example of the Day to Day Dashboard
- Here are the actions that Dale will have to take



Sparklines offer a quick visual for the user.

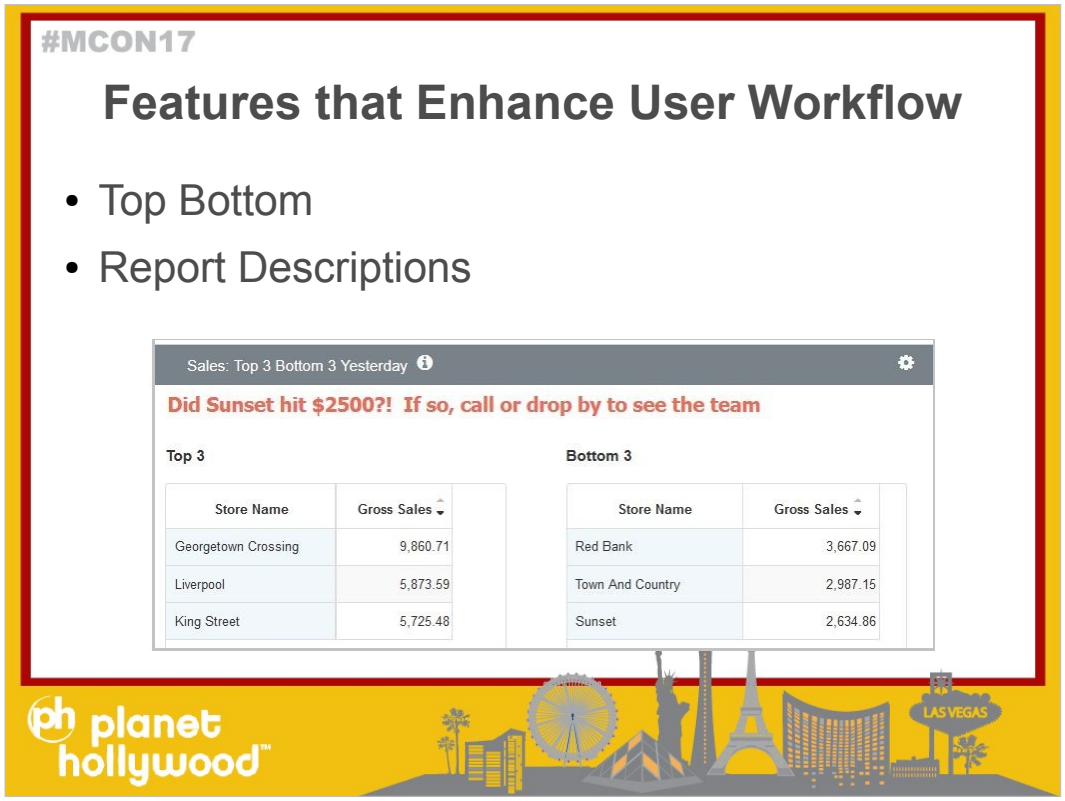
This Sparkline : Sales by hour, can help when evaluating operating hours.

If you are spending the money on labor, let's say $50 dollars, and at 9PM you are still making $90, Is it worth it to stay open for another hour or even 30 minutes?



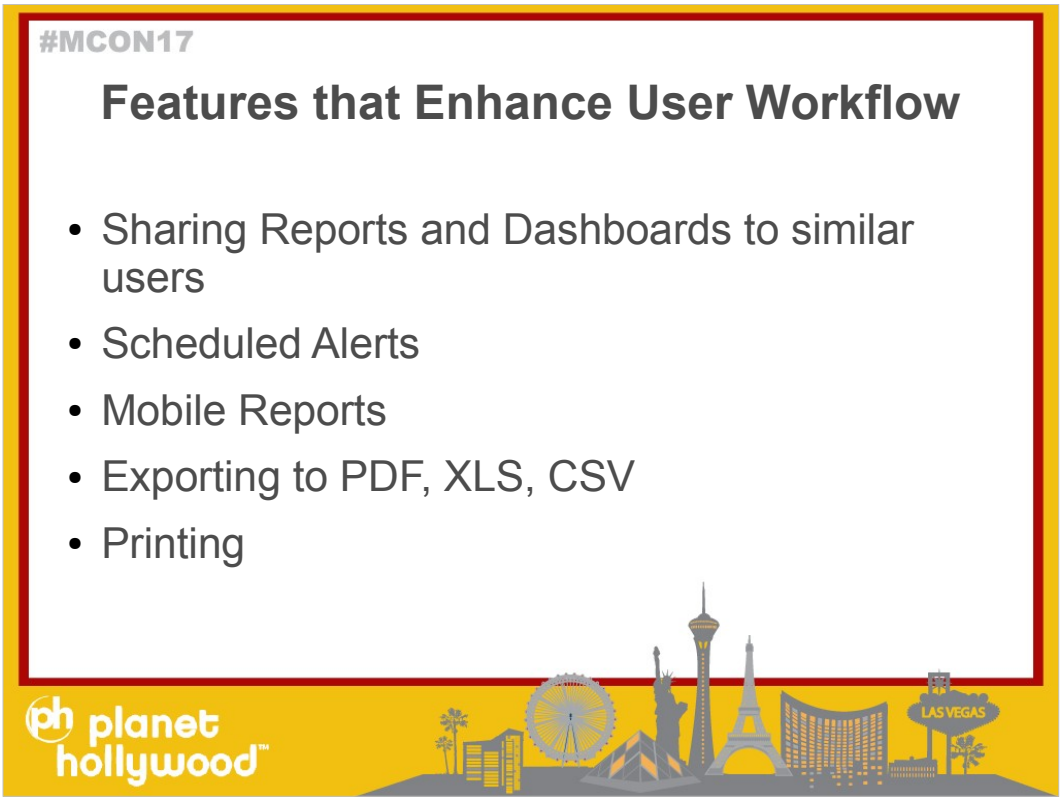
KPI (Key Performance Indicators) offer a quick way for users to see which row is important

Mirus is good at math, Let Mirus do the work

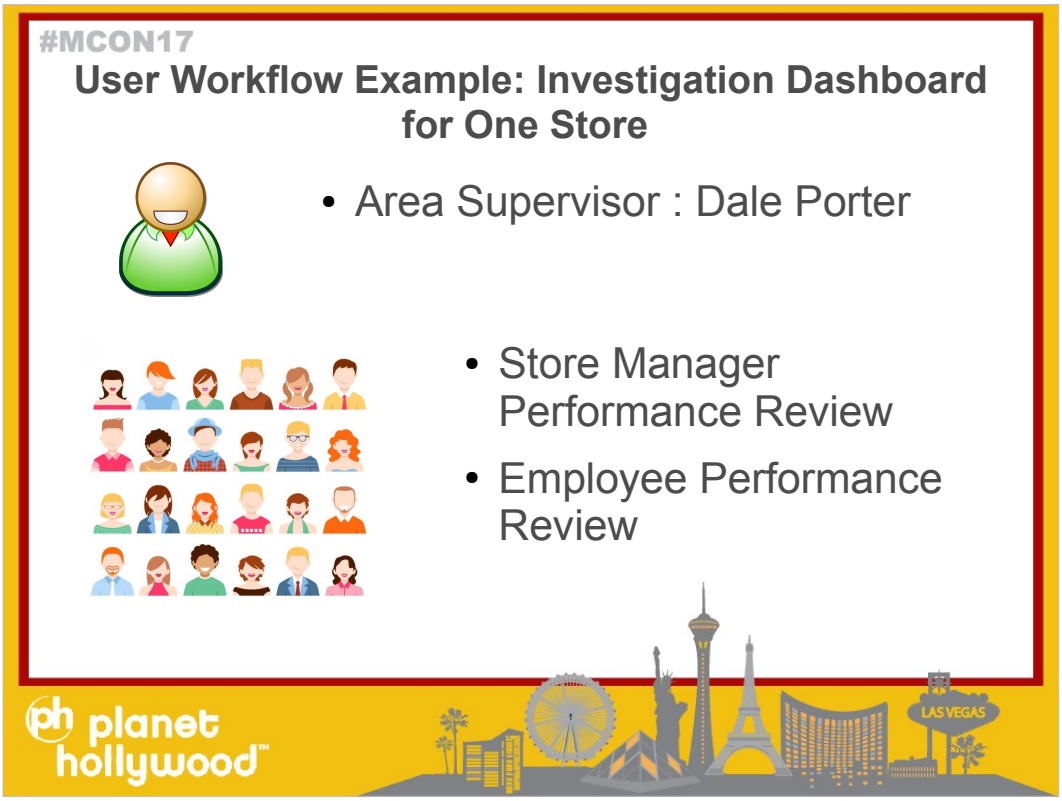


Top Bottom: quickly breaks out the Top and/or bottom

Report Description is another way to communicate Actions to the user on a report

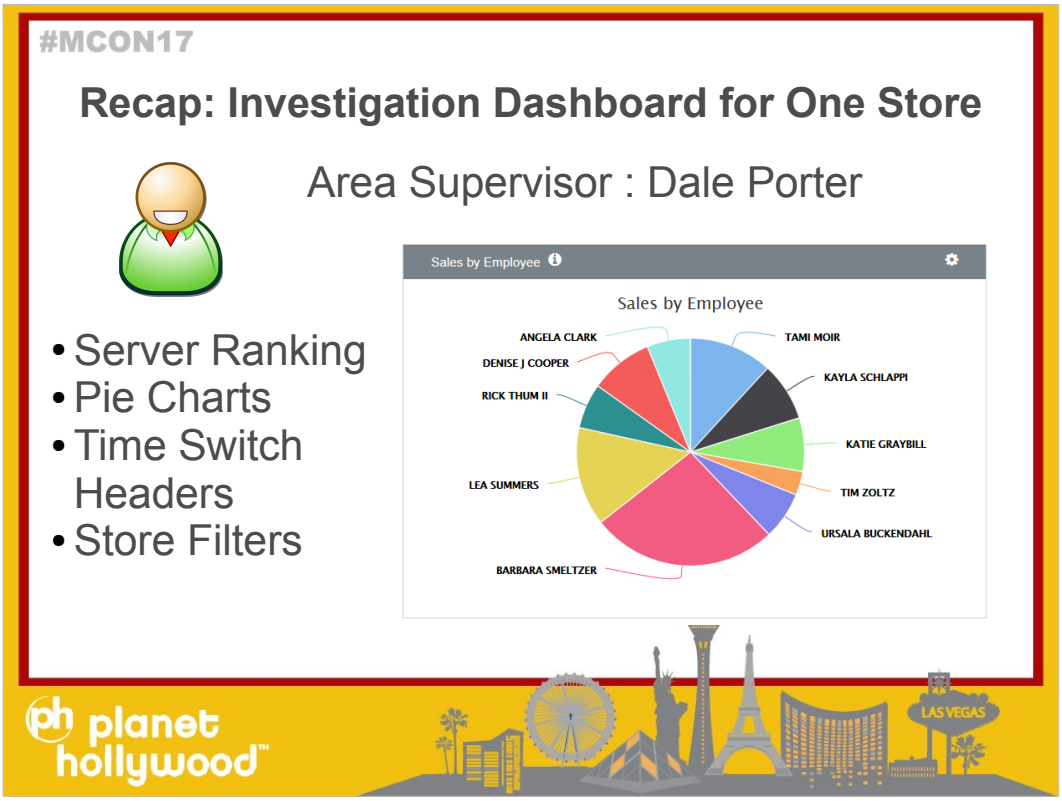


There are some features that were not shown on this specific example



- Let me show you the next dashboard workflow.
- This next dashboard is for
- investigation or digging deeper into one specific store
- This dashboard would be used if you have 20 minutes, can be done ad hoc or 2 times a week)

- Example of the Dashboard for One store
- ALT + TAB



- Recap of the Dashboard for one store:
- Levington

- Ranking: for Servers
- Visualization: Pie charts

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Site Admin Tools that Enhance User Workflows

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Use Case for User Group

- User Groups can be created in Site Admin.
- User Groups allows you to quickly group people together to set permissions.
- Quick way to share reports, dashboards, and schedule alerts to multiple users.

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- Example:
  - Mobile reports: Share a Mobile enabled report to the Mobile User Group. All users can now access the report on the Moble App.
  - New Hire in Marketing. Add their user to the Marketing User Group to have the same Reports & Dashboards as everyone else on the team.

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- This is useful if you have users that should not be allowed to see other stores.

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- Example:
  - An Area Manager should only see data for the stores and employees in their Area

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- Example

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Use Case for Filter Set
Filter Set #1
(All Stores)
Filter Set #2
(Just ONE Store)
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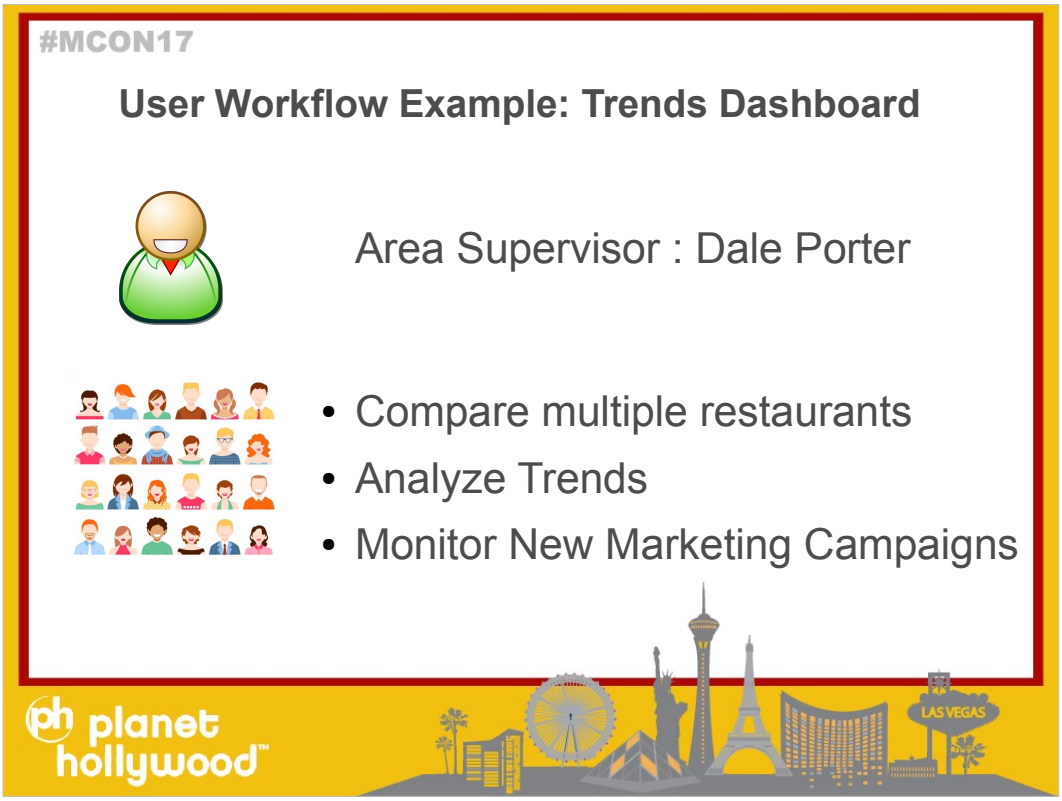
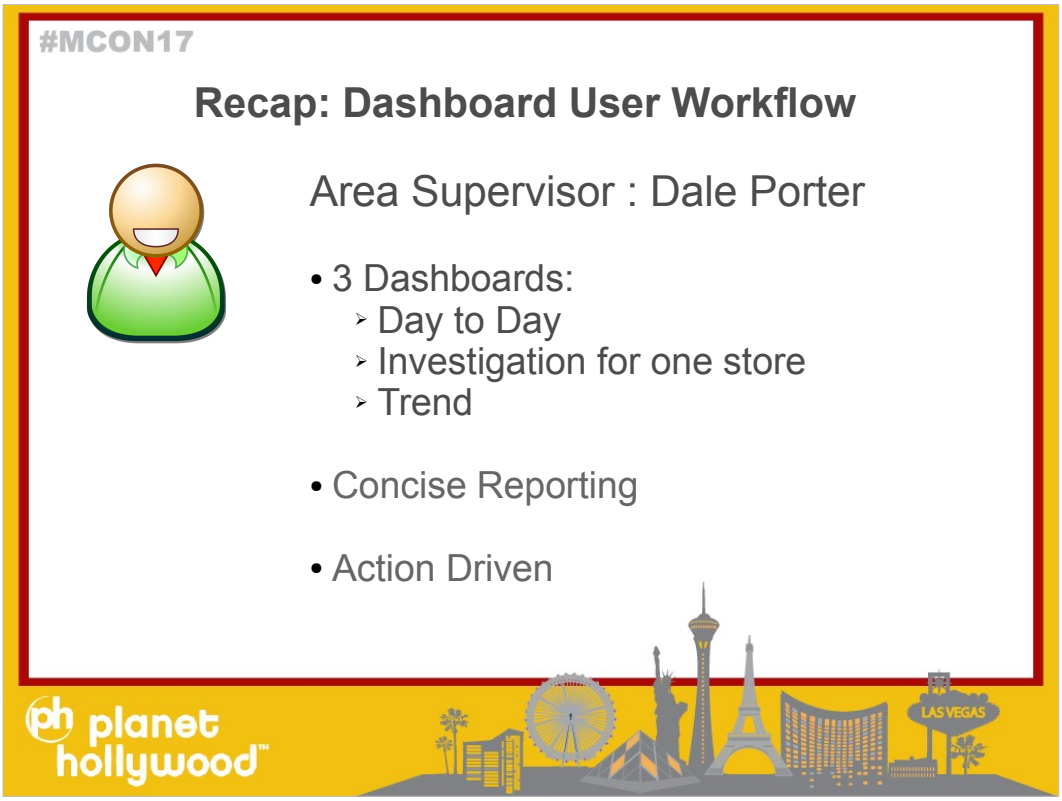
LAS VEGAS

- Example



- 3) Monitoring the health of all restaurant in the area over time
- ALT + TAB
-



- Concise Reports/Dashboards mean:
  - User understands their action in less than 3 minutes
  - Each Report and Dashboard serves one or two purposes
  - Reports are not trying to provide everything all at once
  - User has different workflows depending on their purpose/task

  - The main Challenge is investing the time up front to think about what is most important and creating the reports & dashboard to support the workflow
  - As a best practice, have a test group give you feedback before you roll out to all users.

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