



NorthStar Portal Modules

7/14/2011

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Standard Portal Modules

This section includes information and examples of the Standard Portal Modules that are part of a Default NorthStar Portal installation.

The following Standard Modules are explained:

[Announcements](#)

[Contacts](#)

[Events](#)

[Html Document](#)

[Image](#)

[Links](#)

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[Documents](#)

[Labor Graph](#)

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[Un-Commit](#)

[RSS Feed](#)

[Media Player](#)

[Forum](#)

[Commit Override](#)

Announcements

Module Type

Standard

The Announcements Module displays information along with a "read more" link, which is accessible until the expiration date.

Install Type

Default

New Announcement Detail fields are:

Usage

Announcements

- Title
- Read More Link (Standard / Mobile)
- Description
- Expires (Date the Announcement has expired)

Sorting Options

N/A

Configuration Instructions

Follow these steps to configure this module:

Business Process

Dependency

N/A

1. Log into the NorthStar Portal.
2. Navigate to Announcements or add it to the desired tab.
3. Click [Add New Announcement](#).
4. Enter Title, Link, Description, & Expires date.
5. Click [Update](#) when finished.
6. Edit a record by clicking the pencil next to the title.

The screenshot shows the top of the Announcements module. It has a dark header bar with the text "Announcements" on the left and "Add New Announcement" with a document icon on the right. Below the header, there is a list item with a pencil icon on the left, the title "Hello World!", and the text "Hello and Welcome to the Announcement Module. read more..."

The screenshot shows the "Announcement Details" form. It has a dark header bar with the text "Announcement Details". The form contains the following fields:

- Title: Hello World!
- Read More Link: http://www.cbs-posi.com
- Read More (Mobile):
- Description: Hello and Welcome to the Announcement Module. (with a scroll bar)
- Expires: 12/31/2013

At the bottom of the form, there are three buttons: "Update", "Cancel", and "Delete this item". Below the buttons, there is a label "Created by on" followed by a blank space.

Contacts

<p>Module Type Standard</p> <p>Install Type Default</p> <p>Usage Contact Info</p> <p>Sorting Options N/A</p> <p>Business Process Dependency N/A</p>	<p>The Contacts Module displays the Name, Role, Email, and Contact Phone Numbers for the added contacts.</p> <p><i>Configuration Instructions</i> Follow these steps to configure this module:</p> <ol style="list-style-type: none"> 1. Log into the NorthStar Portal. 2. Navigate to Contacts or add it to the desired tab. 3. Click Add New Contact. 4. Enter Name, Role, Email, Contact 1 & Contact 2. 5. Click Update when finished. 6. Edit a record by clicking the pencil next to a name.
--	--

Contacts Add New Contact 				
Name	Role	Email	Contact 1	Contact 2
Bob Smith	General Manager	bob.smith@mycompany.com	949.555.1234	949.555.4321
John Masters	Regional Manager	john.masters@mycompany.com	213.555.2468	213.555.9753

Contact Details

Name:

Role:

Email:

Contact1:

Contact2:

[Update](#) [Cancel](#) [Delete this item](#)

Created by on

Events

Module Type
Standard

Install Type
Default

Usage
Event Info

Sorting Options
N/A

Business Process Dependency
N/A

The Events Module displays upcoming event details, which consist of an Event Title, Description, Where/ When sub-heading and the Expires date fields. The event is no longer visible after it has expired.

Configuration Instructions

Follow these steps to configure this module:

1. Log into the NorthStar Portal.
2. Navigate to Events or add it to the desired tab.
3. Click [Add New Event](#).
4. Enter Title, Description, Where/ When & Expires.
5. Click [Update](#) when finished.
6. Edit a record by clicking the pencil next to the title.

The screenshot shows the top of the Events module interface. It features a dark header bar with the word "Events" on the left and a button labeled "Add New Event" with a plus icon on the right. Below the header, there is a list item for an event. The event title is "Site Opening" with a pencil icon to its left. Below the title is the location and date: "Hallelujah Junction, CA / 12/26/2011". The description reads: "There is a new site opening Hallelujah Junction, CA on Deceber 26, 2011. Please have all opener teams ready."

The screenshot shows the "Event Details" form. It has a dark header bar with the text "Event Details". The form contains several fields: "Title:" with the value "Site Opening"; "Description:" with a text area containing "There is a new site opening Hallelujah Junction, CA on Deceber 26, 2011. Please have all opener teams ready."; "Where/When:" with the value "Hallelujah Junction, CA / 12/26/2011"; and "Expires:" with a date field containing "12/31/2013". At the bottom of the form, there are three buttons: "Update", "Cancel", and "Delete this item". Below the form, there is a label "Created by on" followed by a blank space.

HTML Document

Module Type

Standard

Install Type

Default

Usage

Display a Web Page,
Image file or other
HTML document

Sorting Options

N/A

Business Process

Dependency

N/A

The HTML Document Module allows you to display web pages, images and/or HTML directly on a Portal page; this module is commonly used to insert company images or home pages on the Welcome tab.

Configuration Instructions

Follow these steps to configure this module:

1. Log into the NorthStar Portal.
2. Navigate to HTML Document or add to a tab.
3. Click the pencil in the top right corner.
4. Enter HTML in Desktop Html Content.
5. Click [Update](#) when finished.



Image

Module Type

Standard

Install Type

Default

Usage

Image Display

Sorting Options

N/A

Business Process

Dependency

N/A

The Image Module allows you to display an image on your portal, commonly used for company logo images. Image Width and Height is entered as pixels by default and can be entered as percentages by adding a percent sign (%) after the numeric value.

Configuration Instructions

Follow these steps to configure this module:

1. Log into the NorthStar Portal.
2. Navigate to Image or add it to the desired tab.
3. Click the pencil in the top right corner.
4. Enter the Image Src (source) Location, Image Width and Image Height values.
5. Click [Update](#) when finished.



Image Settings

Src Location:	<input type="text" value="../images/nslogo.gif"/>
Image Width:	<input type="text" value="150"/>
Image Height:	<input type="text" value="150"/>

[Update](#) [Cancel](#)

Links

Module Type
Standard

The Links Module lets you create and manage internet Hyperlinks that open up in a new browser window.

Install Type
Default

Details are as follows:

- Title: Displayed link name.
- Url: Internet link address.
- Mobile Url: Link address for mobile portal users.
- Description: Displayed when hovering over link.
- View Order: Numeric order of links.

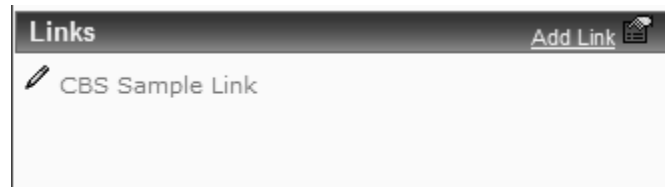
Usage
Internet Links

Sorting Options
View Order #

Configuration Instructions

Follow these steps to configure this module:

1. Log into the NorthStar Portal.
2. Navigate to Links or add it to the desired tab.
3. Click [Add Link](#).
4. Enter Title, Url, Description & View Order.
5. Click [Update](#) when finished.
6. Edit a record by clicking the pencil next to the title.



The screenshot shows the 'Link Details' form. It has a dark header with the text 'Link Details'. Below the header, there are five input fields, each with a label on the left and a text box on the right. The fields are: 'Title' with the value 'CBS Sample Link', 'Url' with the value 'http://www.cbs-posi.com', 'Mobile Url' which is empty, 'Description' with the value 'Custom Business Solutions Home Page', and 'View Order' with the value '0'. At the bottom of the form, there are three buttons: 'Update', 'Cancel', and 'Delete this item'. Below the buttons, there is a label 'Created by on' followed by a blank space.

Quick Links

Module Type

Standard

Install Type

Default

Usage

Internet Links

Sorting Options

View Order #

Business Process

Dependency

N/A

The Quick Links (Quick Launch) Module lets you create and manage internet Hyperlinks that open up in the same browser window.

Details are as follows:

- Title: Displayed link name.
- Url: Internet link address.
- Mobile Url: Link address for mobile portal users.
- Description: (Unused)
- View Order: Numeric order of links.

Configuration Instructions

Follow these steps to configure this module:

1. Log into the NorthStar Portal.
2. Navigate to Quick Links or add to the desired tab.
3. Click [Add Link](#).
4. Enter Title, Url, & View Order.
5. Click [Update](#) when finished.
6. Edit a record by clicking the pencil next to the title.

Quick Launch [Add Link](#)

 CBS Sample Quick Link

 NorthStar Enterprise Home Page

Link Details	
Title:	NorthStar Enterprise Home Page
Url:	http://www.northstarenterprise.com/home/
Mobile Url:	
Description:	
View Order:	1
Update Cancel Delete this item	
Created by on	

Documents

Module Type

Standard

The Documents Module allows you to directly link to or automatically upload documents to your portal.

Install Type

Default

Details are as follows:

- Name: Displayed link name.
- Category: Area of documentation.
- URL to Browse: link to file directly.
- Upload to Web Server: Add file to server.

Usage

Documentation Access

Sorting Options

N/A

Configuration Instructions

Follow these steps to configure this module:

Business Process

Dependency

N/A

1. Log into the NorthStar Portal.
2. Navigate to Documents or add it to the desired tab.
3. Click [Add New Document](#).
4. Enter Name, Category and either type the URL or Browse for a file.
5. Click [Update](#) when finished.
6. Edit a record by clicking the pencil next to the title.

Documents				Add New Document 
Title	Owner	Area	Last Updated	
 Inventory Count Worksheet	jg	Inventory	4/21/2011	

Document Details

Name:

Category:

URL to Browse:

or

Upload to Web Server: Upload document to server
 Store in database (web farm support)

[Update](#) [Cancel](#) [Delete this item](#)

Created by on

Labor Graph

Module Type

Standard

Install Type

Default

Usage

Labor Analysis

Sorting Options

N/A

Business Process**Dependency**

Payroll Commit
Labor Category &
Labor Center setup in
Dimension Setup
Labor Forecast
Labor Budget

The Labor Graph Module displays labor cost totals by labor category, forecast, budget & average labor data in a bar graph, for a selected set of Roll-Up options.

Roll-Up options are as follows:

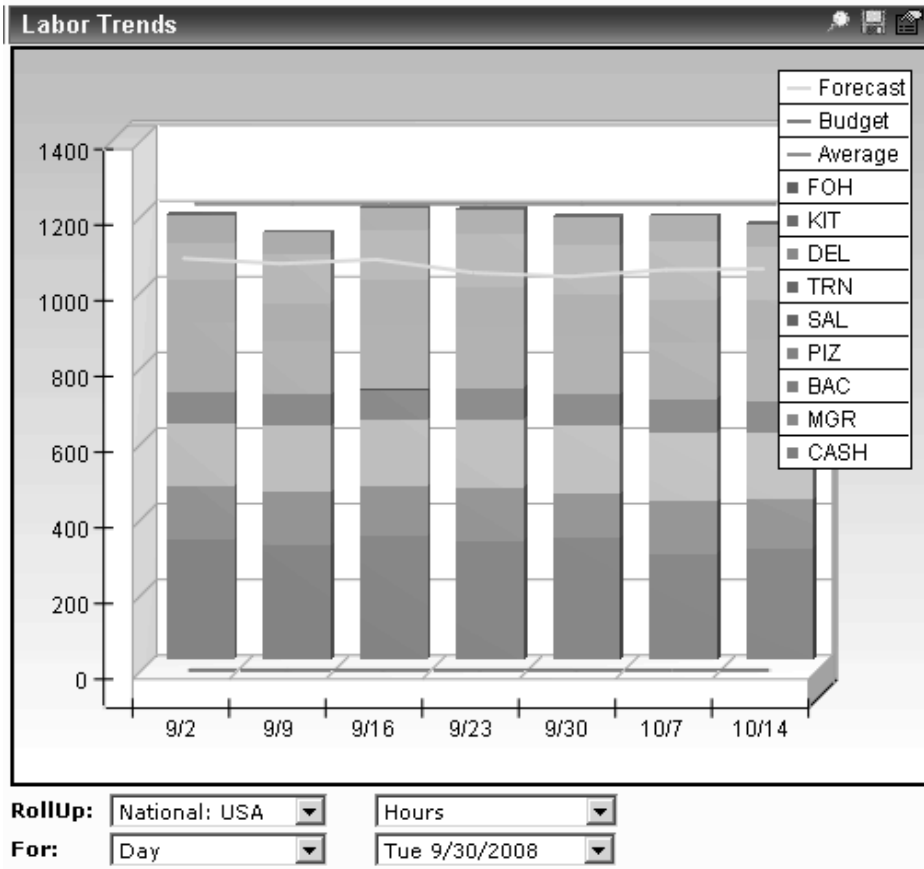
- Organization Selection:
 - National
 - District
 - Region
 - Unit
- Graph Type:
 - Hours
 - Cost
 - Percentage
 - Productivity
- Dates Selection:
 - Period
 - Week
 - Day

Configuration Instructions

Follow these steps to configure this module:

1. Log into the NorthStar Portal.
2. Navigate to Labor Graph or add it to the desired tab.
3. Click the properties button in the top-right corner of the module.
4. On the Graph properties tab, you can specify the graph size & zoom options. You can also choose to display the legend and a chart title.
5. Click [Apply Module Changes](#) when finished, and then click [Close Window](#).
6. Select Roll-Up options for the desired graph output.

Labor Graph



Module	Security	Grid	Graph
Width	500	Custom Settings	
Height	400		
Zoom Width	600		
Zoom Height	500		
Chart Title			
Display Legend	<input checked="" type="checkbox"/>		

Apply Module Changes | Close Window

Sales Graph

Module Type

Standard

Install Type

Default

Usage

Sales Analysis

Sorting Options

N/A

Business Process**Dependency**

Daily Commit
Day Parts, Rev Centers
& Sales Cats setup in
Dimension Setup
Sales Forecast
Sales Budget

The Sales Graph Module displays sales totals by report type, forecast, budget & average sales data in a bar graph, for a selected set of Roll-Up options.

Roll-Up options are as follows:

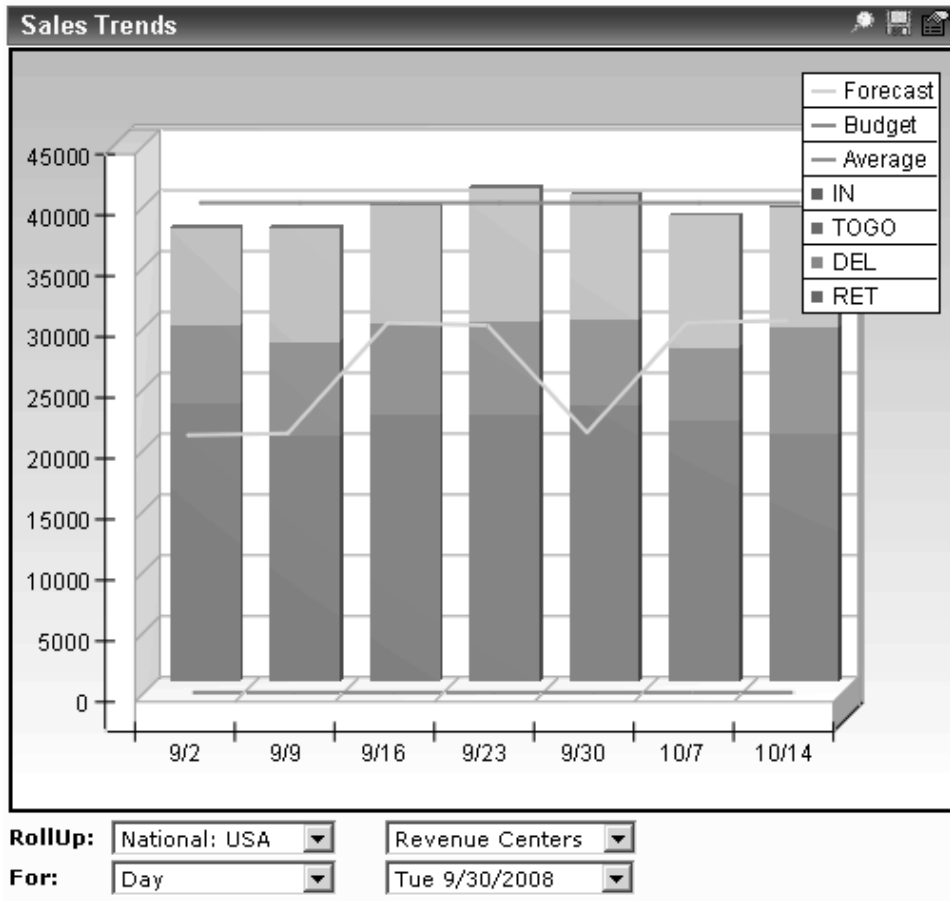
- Report On:
 - National
 - District
 - Region
 - Unit
- Report Type:
 - Revenue Centers
 - Day Parts
 - Sales Categories
- Dates Selection:
 - Period
 - Week
 - Day

Configuration Instructions

Follow these steps to configure this module:

1. Log into the NorthStar Portal.
2. Navigate to Sales Graph or add it to the desired tab.
3. Click the properties button in the top-right corner of the module.
4. On the Graph properties tab, you can specify the graph size & zoom options. You can also choose to display the legend and a chart title.
5. Click [Apply Module Changes](#) when finished, and then click [Close Window](#).
6. Select Roll-Up options for the desired graph output.

Sales Graph



Module	Security	Grid	Graph
Width	500		
Height	400		
Zoom Width	800		
Zoom Height	700		
Chart Title			
Display Legend	<input checked="" type="checkbox"/>		
Custom Settings			
Apply Module Changes		Close Window	

Daily Sales Flash

Module Type

Standard

The Daily Sales Flash Module displays flash sales for a specified day. Configuration requires specification of the exact "Over/ (Short)" title found in GL Setup.

Install Type

Default

The content of the columns are:

Usage

Sales Summary

- Num (Unit Number)
- Name (Unit Short Name)
- Current (Sales on selected date)
- LW (Last Week Sales)
- +/- (Variance)
- LY (Last Year Sales)
- +/- (Variance)
- Lbr % (Labor Percentage of Sales)
- O/S (Over / Short)
- WTD (Week to Date Sales)
- P WTD (Previous Week to Date Sales)
- % +/- (Week Variance percentage)
- LY (Last Year WTD sales)
- % +/- (Last Year WTD Variance percentage)
- Labor % (WTD Labor Percentage of sales)
- O/S (WTD Over/Short)

Sorting Options

ASC/DESC All Columns

Business Process

Dependency

Daily Commit

Mission Control

Aggregate Config

Configuration Instructions

Follow these steps to configure this module:

1. Log into the NorthStar Portal.
2. Navigate to Daily Sales Flash or add it to the desired tab.
3. Click the pencil button in the top-right corner of the module to set the over short title.
4. Enter the Over/Short title as entered in the GL.
5. Click [Update](#) when finished.
6. Select a date from the calendar and then click the green triangle "Go / Run" button.

Daily Sales Flash

Daily Sales Flash																
3/28/2011																
Num	Name	Current	LW	+/-	LY	+/-	Lbr %	O/S	WTD	P WTD	% +/-	LY	% +/-	Labor %	O/S	
001	T1	6,576	5,512	19.3	0.00		20.2	205.35	18,935	19,674	-3.8	\$ 0		23.1	349.38	
Num	Name	Current	LW	+/-	LY	+/-	Lbr %	O/S	WTD	P WTD	% +/-	LY	% +/-	Labor %	O/S	
		6,576	5,512	19.3	0.00	0.0	20.2	205.35	18,935	19,674	-3.8	\$ 0	0	23.1	349.38	

Daily Sales Flash

You need to set your Over Short GL Title
Hit the edit button to set your GL Title

Daily Sales Flash

Over Short GL Title:

[Update](#) [Cancel](#)

Item Hot List

Module Type

Standard

Install Type

Default

Usage

Item Summary

Sorting Options

ASC/DESC All Columns

Business Process**Dependency**

Daily Commit

Mission Control

Aggregate Config

The Item Hot List Module displays item sales summary for a day or date range, by "Hot List Selection" category. Configuration requires creation of hot list selections, found in properties on the Hot Lists tab.

The content of the columns are:

- Item (Item Description)
- Count (Quantity Sold)
- Cost (Item Cost)
- \$ Net (Net Sales)
- Ext Cost (Extended Cost)
- % Cost (Cost Percentage)
- \$ Profit (Profit Amount)
- % Profit (Profit Percentage)
- %Of Net (Percentage of Net Sales)

The content of the rows are:

- Individual item breakdown
- Totals (footer)

Configuration Instructions

Follow these steps to configure this module:

1. Log into the NorthStar Portal.
2. Navigate to Item Hot List or add it to the desired tab.
3. Click the Properties button in the top-right corner of the module and go to the Hot Lists tab.
4. Click Create Default Lists or manually create them.
5. Click [Apply Module Changes](#) and [Close Window](#) when finished.
6. Select a RollUp option, Begin and End Dates and then click the green triangle "Go / Run" button.

Item Hot List

Item Hot List								
RollUp	Begin Date	End Date	Hot List Selection					
National: All Locatic	1/1/2011	4/21/2011	Top Sellers					
Item	Count	Cost	\$ Net	Ext Cost	% Cost	\$ Profit	% Profit	% OfNet
MEAL FOR TWO \$20.95 MM	1,868	0.00	\$ 39,469	0	0.0 %	39,469	100.0 %	11.8 %
LARGE PIZZA	1,555	1.28	\$ 29,158	1,959	6.7 %	27,199	93.3 %	8.7 %
MED PIZZA	1,087	0.82	\$ 15,792	891	5.6 %	14,901	94.4 %	4.7 %
MARY'S MEAL SPAG/MB PASTA	485	0.00	\$ 10,161	0	0.0 %	10,161	100.0 %	3.0 %
SMALL PIZZA	859	0.52	\$ 9,717	447	4.6 %	9,271	95.4 %	2.9 %
BAMBINO PIZZA	1,192	0.37	\$ 8,980	441	4.9 %	8,539	95.1 %	2.7 %
MARYS HOUSE SALAD	1,665	0.37	\$ 8,939	616	6.9 %	8,323	93.1 %	2.7 %
SOUP & SALAD PR	1,042	-0.04	\$ 6,791	-42	-0.6 %	6,833	100.6 %	2.0 %
PIZZA SL COMBO PR	959	0.23	\$ 6,234	221	3.5 %	6,013	96.5 %	1.9 %
LARGE MARY'S SALAD	616	1.04	\$ 6,209	641	10.3 %	5,568	89.7 %	1.8 %
SM MARY'S SALAD	994	0.52	\$ 6,010	517	8.6 %	5,493	91.4 %	1.8 %
DELIVERY CHARGE	1,801	0.00	\$ 5,403	0	0.0 %	5,403	100.0 %	1.6 %
Item	Count	Cost	\$ Net	Ext Cost	% Cost	\$ Profit	% Profit	% OfNet
	62,552	0.00	\$ 335,856	38,094	11.3 %	297,762	88.7 %	100.0 %

Module
Security
Grid
Hot Lists

Top Sellers
 Bottom Sellers
 High Profit \$
 High Profit %
 Low Profit \$
 Low Profit %

[Delete](#)

[Create Default Lists](#)

Add

Categories **Items**

APPETIZERS
 APPROVED PROMO
 BAKED POTATOES
 BANQUET/DELIVERY
 BANQUETS
 BATCH RECIPES
 BEER
 BEVERAGE
 BEVERAGES
 BREAKFAST
 BULK TO GO
 BURGERS/SANDWICHES
 COMP CARD

HAPPY HOUR
 KIDS
 LIQUOR
 Lunch
 MISC
 Miscellaneous
 Mixed Drinks
 MODIFIERS
 Non Alcoholic
 NON FRANCH
 OPEN FD/ADCS/SIDE
 OUTSIDE SAL
 PASTA

Sort:

[Update](#)

[Apply Module Changes](#)
[Close Window](#)

Message Center

Module Type

Standard

Install Type

Default

Usage

Messaging

Sorting Options

ASC/DESC On
Received From and
Date Columns

Business Process**Dependency**

Organization setup

The Message Center Module allows you to create and manage messages to your organization, including user acknowledgements and responses. Messages are displayed during a date range and are only accessible by the authorized users of the specified organizations.

The content of the columns are:

- Received From (Message Creation User)
- Body (Message Text)
- Date (Message Creation Date)
- Response (Edit, Acknowledge or Response)

The content of the rows are:

- Message Text and Information
- Acknowledgements/ Responses



Configuration Instructions

Follow these steps to configure this module:


1. Log into the NorthStar Portal.
2. Navigate to Message Center or add it to the desired tab.
3. Click the New Message button (Green Arrow on Paper) in the top-right corner of the module.
4. Set acknowledgement options, enter show from and to dates, and then enter your message.
5. On the Recipients tab, add the organizations that have access to the message.
6. Click [Post Message](#) when finished.
7. Users can now see and respond to the message.

Message Center

[Administrator]

Message Center  			
Received From	Body	Date	Response
admin	As of next month, our "Cheddar Biscuits" will no longer be complimentary and will only be offered as an appetizer. Please be prepared for civil unrest.	4/25	Edit Delete

[User]

Message Center 			
Received From	Body	Date	Response
admin	As of next month, our "Cheddar Biscuits" will no longer be complimentary and will only be offered as an appetizer. Please be prepared for civil unrest. Read: jg Resp. jg Protective gear is ready.	4/25	Got It Respond

[Configuration]

Message Recipients

Acknowledge or Reply Required:

Show From:

Show Till:

Message

As of next month, our "Cheddar Biscuits" will no longer be complimentary and will only be offered as an appetizer. Please be prepared for civil unrest.

Message Recipients

Recipients

Type	Name	
Org	Irvine	Delete

Organization

National: USA

Reports Viewer

Module Type

Standard

Install Type

Default

Usage

Reporting

Sorting Options

Varies by Report

Business Process**Dependency**

Reports Viewer setup
Data dependencies
vary by report

The Reports Viewer Module allows you to setup and run NorthStar reports by specified organizational selections and selected date range options. Availability of reporting options varies by NorthStar Report.

Report Viewer options are as follows:

- Report Selection by Name:
 - Configured on the Admin screen
- For (Organization Selection):
 - National
 - Regional
 - District
 - Unit
- By (Date Type Selection):
 - Date Range
 - Day
 - Week Ending
 - Period
 - Quarter
 - Year
- Date Selection:
 - Options Vary by Date Type choice
- Run Report:
 - Launch the Report
- Admin:
 - Setup Reports

Configuration Instructions

Follow these steps to configure this module:

1. Log into the NorthStar Portal.
2. Navigate to Reports Viewer or add it to the desired tab.
3. Click [Admin](#) to access the Report Viewer Editor.
4. Add or edit reports in the Report Viewer Editor.
5. Select a report name, org, date type, date option and click [Run Report](#).
6. Report is generated and shown in its own window.

Reports Viewer

Menu Item Sales ▾ For: National: USA ▾ By: Date Range ▾ Start Date: 2/9/2011 ▾ End Date: 3/9/2011 ▾ Run Report | Admin |

Report Viewer Editor

Reports <ul style="list-style-type: none">Manager ActivityMenu Item SalesHourly Sales AnaCommit DailyCompare SalesCompare Sales MTRACTRAC CommittedP&L Actual vs BuP&L Actual vs EsP&L Actual vs LYLabor Analysis	Add Report <p>Title: <input type="text"/></p> <p>Template: -- Select A Template -- ▾ Add</p>	Quick Help <p>Use this form to configure reports and report permissions.</p> <p>This configuration is for this module implementation only and will not affect other report viewer modules.</p>
	Report Settings <p>Title: <input type="text" value="Manager Activity"/></p> <p>Template: <input style="border: none; border-bottom: 1px solid black;" type="text" value="ManagerActivitySummary"/> ▾</p> <p>Format: <input style="border: none; border-bottom: 1px solid black;" type="text" value="Default"/> ▾</p> <p>Sort Order: <input type="text" value="1"/></p> <p>Permissions: <input style="border: none; border-bottom: 1px solid black;" type="text" value="Admins"/> ▾</p> <div style="border: 1px solid black; padding: 2px;"><p>Admins</p></div> <p style="text-align: right;">Delete Role Add Role</p> <p style="text-align: right;">Delete Update</p>	

Commit Grid

Module Type

Standard

Install Type

Default

Usage

Commit Status

Sorting Options

N/A

Business Process

Dependency

Daily Commit

Payroll Commit

The Commit Grid Module displays the most recent Daily GL and Payroll commit dates by unit (another version also includes Unit Short Name). Dates are highlighted Green (on time), Yellow (late) or Pink (previous day).

Configuration Instructions

Follow these steps to configure this module:

1. Log into the NorthStar Portal.
2. Navigate to Commit Grid or add it to the desired tab.
3. Click the pencil button in the top-right corner of the module to setup Commit Grid Parameters.
4. Enter DSR Days Back, DSR Hr Due In, Payroll Days Back & Payroll Hr Due In values.
5. Click [Update](#) when finished.

Unit	Daily	Payroll
001	04/24/2011	04/17/2011
002	04/24/2011	04/17/2011
003	04/24/2011	04/17/2011
004	04/24/2011	04/17/2011
005	04/24/2011	04/17/2011
006	04/24/2011	04/17/2011

Commit Grid Parameters	
DSR Days Back:	<input type="text" value="1"/>
DSR Hr Due In:	<input type="text" value="9:00 AM"/>
Payroll Days Back:	<input type="text" value="14"/>
Payroll Hr Due In:	<input type="text" value="7:00 AM"/>

[Update](#) [Cancel](#) [Delete this item](#) [Close](#)

Invoice Viewer

Module Type

Standard

Install Type

Default

Usage

Invoice Storage

Sorting Options

N/A

Business Process**Dependency**

Get Files Mission

The Invoice Viewer Module allows you to store and view invoice files that have been saved to a JPG image file. A get files mission will need to be setup on the Landing Pad Mission Control.

Invoice Viewer options are as follows:



- Unit Selection
- Date Selection

Configuration Instructions

Follow these steps to configure this module:



1. Log into the NorthStar Portal.
2. Navigate to Invoice Viewer or add it to the desired tab.
3. Click the pencil button in the top-right corner of the module to setup folder options.
4. Enter an invoice root folder and a unit sub-folder.
5. Click [Update](#) and then click [Back](#) when finished.
6. Select a unit and a date.
7. Invoice JPG files are now displayed.

Invoice Viewer

Invoice Viewer  

Unit: Date:

· Invoice001.jpg
· Invoice002.jpg

Invoice Viewer  

Unit: Date:

The InvoiceRootDir has not been set.

Setup Invoice Paths

Invoice Root Folder: (ex: c:\inetpub\ftproot)

Unit Sub-Folder: (ex: docpics)

[Update](#) [Back](#)

Un-Commit

Module Type

Standard

Install Type

Default

Usage

Un-Commit

Sorting Options

N/A

Business Process**Dependency**

Daily Commit

The Un-Commit Module allows an administrator or authenticated user the ability to un-commit the last GL commitment or Payroll commitment by a unit.

Configuration Instructions

Follow these steps to configure this module:

1. Log into the NorthStar Portal.
2. Navigate to Un-Commit or add it to the desired tab.
3. Select a Unit to roll back one commit date.
4. Click [Un-Commit](#) for the GL or Payroll date.
5. Click [OK](#) on the warning message.
6. The site will need to recommit the data.

The screenshot shows a window titled "Roll Back Commits" with a close button. Below the title bar, there is a dropdown menu for "Units:" currently set to "Unit: Irvine". Below this, there are two rows of data. The first row shows "Commitment Date:" as "3/30/2011" with a blue "Un-Commit" link to its right. The second row shows "PayRoll Date:" as "3/27/2011" with a blue "Un-Commit" link to its right.

RSS Feed

Module Type
Standard

Install Type
Default

Usage
RSS Links

Sorting Options
N/A

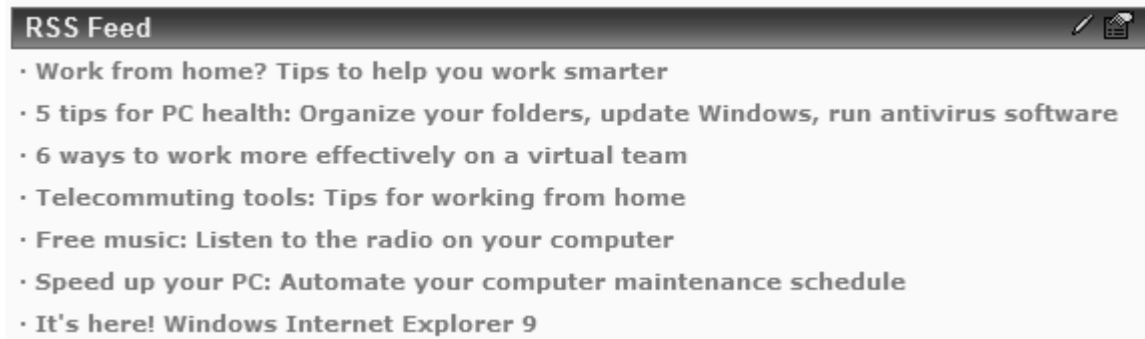
Business Process Dependency
N/A

The RSS Feed Module displays RSS links. RSS (Really Simple Syndication) is used to publish frequently updated works—such as blog entries, news headlines, etc. This example is displaying a Microsoft RSS Feed; however, it is relatively simple to create your own.

Configuration Instructions

Follow these steps to configure this module:

1. Log into the NorthStar Portal.
2. Navigate to RSS Feed or add it to the desired tab.
3. Click the pencil button in the top-right corner of the module to setup the RSS Feed.
4. Enter the URL and select the Feed count.
5. Click [Save](#) when finished.



Media Player

Module Type
Standard

The Media Player Module displays a video file on a portal page.

Install Type
Default

Configuration Instructions

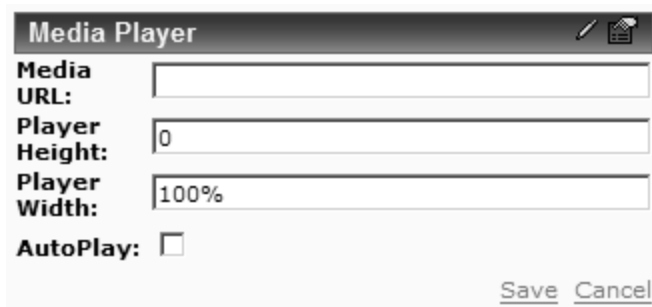
Follow these steps to configure this module:

Usage
Media

1. Log into the NorthStar Portal.
2. Navigate to Media Player or add it to the desired tab.
3. Click the pencil button in the top-right corner of the module to setup the media options.
4. Enter a Media URL, change Height and Width options and set AutoPlay if so desired.
5. Click [Save](#) when finished.

Sorting Options
N/A

Business Process Dependency
N/A

A screenshot of the Media Player configuration dialog box. The window title is "Media Player". It contains the following fields:

- Media URL: [Empty text box]
- Player Height: [0]
- Player Width: [100%]
- AutoPlay:

At the bottom right, there are "Save" and "Cancel" buttons.

Forum

Module Type

Standard

The Forum Module displays a set of discussion or message board threads, by a category or topic.

Install Type

Default

Configuration Instructions

Follow these steps to configure this module:

Usage

Discussion Board

1. Log into the NorthStar Portal.
2. Navigate to Forum or add it to the desired tab.
3. Click the pencil button in the top-right corner of the module to setup the Forum Categories.
4. Enter Title & Sort Order, and then click [Add](#).
5. Click [Done](#) when finished.
6. Click a category name and then click [New Thread](#) to start a forum thread.

Sorting Options

Forum Categories by
Sort Order #

Business Process

Dependency

N/A

Categories	Threads	Posts
Emergencies	2	3
Employees	3	4
Customers	0	0
General	1	3
Misc	0	0

Forum	
Edit Categories	
<div style="border: 1px solid black; padding: 5px;">Emergencies Employees Customers General</div>	<p>Title: <input type="text" value="Misc"/></p> <p>Sort Order: <input type="text" value="4"/></p> <p style="text-align: right;">Add Update Delete Done</p>

Commit Override

Module Type

Standard

Install Type

Default

Usage

Code Generator

Sorting Options

N/A

Business Process**Dependency**

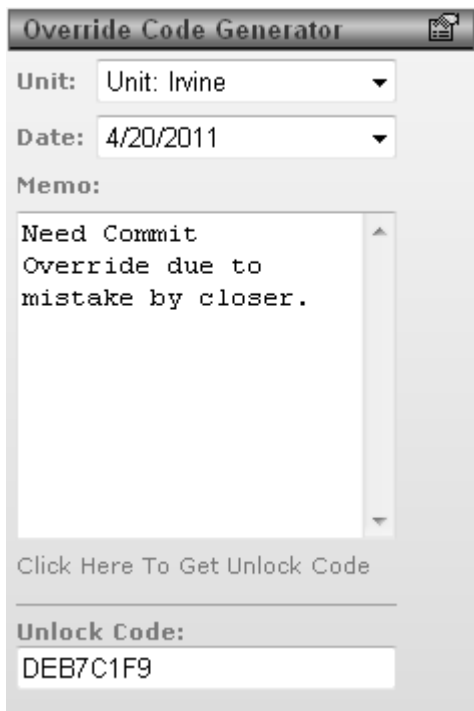
N/A

The Commit Override Module creates an unlock code and logs it in the database. This code is used in NorthStar Desktop when the Alert's feature is enabled, to override a Halt Alert. A report is available to view the commit override logs.

Configuration Instructions

Follow these steps to configure this module:

1. Log into the NorthStar Portal.
2. Navigate to Commit Override or add it to the desired tab.
3. Select a Unit and a Commit Date.
4. Enter a Memo indicating why override is needed.
5. [Click Here to Get Unlock Code](#) to generate a code.
6. Code can be copied and used in NorthStar Desktop.



The screenshot shows a web application window titled "Override Code Generator". It contains the following elements:

- Unit:** A dropdown menu with "Unit: Irvine" selected.
- Date:** A dropdown menu with "4/20/2011" selected.
- Memo:** A text area containing the text: "Need Commit Override due to mistake by closer."
- Action:** A button labeled "Click Here To Get Unlock Code".
- Unlock Code:** A text field displaying the generated code "DEB7C1F9".

Admin Portal Modules

This section includes information and examples of the Admin Portal Modules that are part of a Default NorthStar Portal installation.

The following Admin Modules are explained:

[Report Elements](#)

[Module Types](#)

[Roles](#)

[Site Settings](#)

[Manage Users](#)

[Organization Manager](#)

[Dimension Setup](#)

[Franchise Manager](#)

[Security Defaults](#)

Report Elements

Module Type

Admin

The Report Elements Module allows Portal Admins to change the Element ID (EID) number of the Net Sales GL Category, used for reporting.

Install Type

Default

Configuration Instructions

Follow these steps to configure this module:

Usage

EID Net Sales

1. Log into the NorthStar Portal.

Sorting Options

N/A

2. Navigate to Report Elements or add it to the desired tab.

Business Process

Dependency

N/A

3. Enter the Net Sales EID Number.

4. Click [Apply Changes](#) when finished.

The screenshot shows a web interface titled "Report Elements" with a document icon. Below the title, it states: "The Element ID entered here affects the following reports and/or modules:". A bulleted list follows: "Daily Sales Flash Module", "Labor Cost Analysis Report", "Comparative Sales Report", and "Royalty Projection Report". Below the list, it says "Set to 0 to disable using an EID." There is a label "Net Sales:" followed by a text input field containing the number "0". At the bottom of the form is a button labeled "Apply Changes".

Module Types

Module Type

Admin

The Module Types Module displays all modules installed on the Portal. Module definitions can be added, removed or edited, including the name and source locations.

Install Type

Default

Configuration Instructions

Follow these steps to configure this module:

Usage

Module Management

1. Log into the NorthStar Portal.
2. Navigate to Module Types or add it to the desired tab.
3. Click the pencil button next to the module name to update definitions or delete the module.
4. If changes are made, click [Update](#) when finished.
5. To remove a module, click [Delete this module type](#).


Sorting Options

N/A

Business Process







Dependency

N/A

Module Definitions 

This feature is for advanced users only. Improperly modifying these definitions could cause data loss and configuration errors on your Portal.

Please refer to the documentation.

-  (Admin) Dimension Setup
-  (Admin) Franchise Manager
-  (Admin) Labor Cost Analysis Setup
-  (Admin) Manage Users
-  (Admin) Module Types
-  (Admin) Organization Manager

Module Type Definition

Friendly Name:	<input type="text" value="(Admin) Module Types"/>
Desktop Source:	<input type="text" value="Admin/ModuleDefs.ascx"/>
Mobile Source:	<input type="text"/>

[Update](#) [Cancel](#) [Delete this module type](#)

Roles

Module Type

Admin

The Roles Module lets you create and manage the available roles that are assigned to Portal users.

Install Type

Default

Configuration Instructions

Follow these steps to configure this module:

Usage

User Access Types

1. Log into the NorthStar Portal.

2. Navigate to Roles or add it to the desired tab.

Sorting Options

N/A

3. Click [Add New Role](#) to create a role.

Business Process

Dependency

N/A

4. Click the pencil button next to a role to change the name or change role members.

5. Click [Change Role Members](#), and select the user to add to the role and then [Add existing user to role](#).

6. [Save Role Changes](#) when finished.

Role Management

All module and tab security is configured via Roles. Users are assigned to Roles. Add a user to a Role to allow them access to a Tab or Module.

You must have a role "admins" for the administration of the Portal. **DO NOT DELETE THE "Admins" ROLE**

- X Admins
- X Accounting
- X Users

[Apply](#) [Change Role Members](#)

[Add New Role](#)

Role Membership: Accounting

[Add existing user to role](#)

X Acct

[Save Role Changes](#)

Site Settings

Module Type

Admin

The Site Settings Module allows an admin user to easily update the Portal's Site Title and the Site Logo.

Install Type

Default

Configuration Instructions

Follow these steps to configure this module:

Usage

General Options

1. Log into the NorthStar Portal.
2. Navigate to Site Settings or add it to the desired tab.
3. Change the Site Title to the desired title or name.
4. Change the Site Logo file location.
5. Click [Apply Changes](#) when finished.

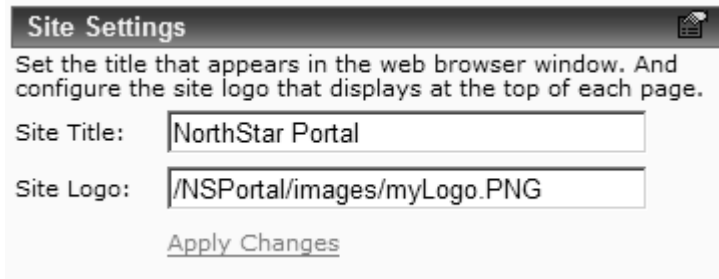
Sorting Options

N/A

Business Process

Dependency

N/A



The screenshot shows a window titled "Site Settings" with a close button in the top right corner. Below the title bar, there is a descriptive text: "Set the title that appears in the web browser window. And configure the site logo that displays at the top of each page." There are two input fields: "Site Title:" with the value "NorthStar Portal" and "Site Logo:" with the value "/NSPortal/images/myLogo.PNG". At the bottom of the form, there is a button labeled "Apply Changes".

Manage Users

Module Type

Admin

The Manage Users Module is where administrators can add and edit users and user options.

Install Type

Default

Configuration Instructions

Follow these steps to configure this module:

Usage

User Administration

1. Log into the NorthStar Portal.
2. Navigate to Manage Users or add it to the desired tab.
3. Click [Add New User](#), change name and password, click [Apply Name and Password Changes](#).
4. Select a role and click [Add user to this role](#) then [Save User Changes](#).


Sorting Options

N/A



Business Process

Dependency

N/A

Manage Users 

This section permits Administrators to manage users and their security roles directly.

Registered Users:   [Add New User](#)

Manage User: admin

User Name:



Name:

Password:

Confirm Password:

[Apply Name and Password Changes](#)


Task List Alternate User/Password Setup:


Type:  

User Name:

Password:

[Apply Alternate UserName and Password Changes](#)

 [Add user to this role](#)

 Admins

[Save User Changes](#) [Cancel Changes](#)

Organization Manager

Module Type

Admin

Install Type

Default

Usage

Organizational
Structure

Sorting Options

N/A

**Business Process
Dependency**

N/A

The Organization Manager Module is an administrative utility that is used to configure the company's Portal organizational structure. Admin users have access to setup the Organization Types; National, Regional, District & Unit, the Roles and Organizations for each Type, the hierarchal structure of the organizations and the Members of each Organization. Members represent Portal user accounts and their level of organizational access, which also determines reporting accessibility. Member access can be limited only to specific units, to entire districts or regions, and can given full, national access. The Active Rights for Organization Types and the selection of Roles with a Right is also configured in this module.

Configuration Instructions

Follow these steps to configure this module:

1. Log into the NorthStar Portal.
2. Navigate to Organization Manager or add it to the desired tab.
3. Select an Organization Type and a Role.
4. Click [Add Organization](#) to add an org to the selected org type.
5. Click [Add Member](#) to assign users to an org type.
6. Advanced configuration may require professional assistance, training and/or documentation.

Organization Manager

Hierarchy | Edit Organization Type | Edit Rights | Edit Role | Edit Organization / Associate Members

Organization Types	Roles	Organizations	Members
4-Unit 3-District (operational) 2-Regional (operational) 1-National (operational)	ALL Portal Admin	USA	admin (Admin)

[Add Organization Type](#) [Add Role](#) [Add Organization](#) [Add Member](#) [Remove Member](#)

Hierarchy | Edit Organization Type | Edit Rights | Edit Role | Edit Organization / Associate Members

Irvine

General | Member Organizations | Other Organizations

Name: Irvine

Code: 001

Description: Irvine

Abbreviation: T1

Comp Date:

Close Date:

Company Code: 2

[Update](#) [Delete](#)

Hierarchy | Edit Organization Type | Edit Rights | Edit Role | Edit Organization / Associate Members

Active Rights for Selected Organization Type:

- Message - Ack
- Message - Create
- Message - Reply
- Message - View
- Review Labor
- Review Unit Sales

Name: Review Unit Sales

Code: review sales (unit)

Desc: May review sales on a unit level

Inferrable

[Update Right](#) [Delete](#) [Update](#)

[Add New Right](#)

Roles with this Right

- General Manager

Roles in parent organizations with this Right

- District Manager [3-District (operational)]
- Regional Manager [2-Regional (operational)]
- Portal Admin [1-National (operational)]
- ALL [1-National (operational)]

[Update](#)

Dimension Setup

Module Type

Admin

Install Type

Default

Usage

Integration

Sorting Options

Sort Order #

Business Process**Dependency**

N/A

The Dimension Setup Module is an administrative utility that is used to configure several categorical dimensions that are used in Portal Reporting. The Dimensions that are configured in this module are Day Parts, Sales Cats, Rev Centers, Labor Groups and Labor Cats. The dimension groups need to be setup in concordance with the settings in NorthStar Desktop.

Dimension tab name / NorthStar Desktop counterpart:

- Day Parts / Day Parts
- Sales Cats / Sales Categories
- Rev Centers / Revenue (Cost) Centers
- Labor Groups / Labor Groups
- Labor Centers / Labor Departments
- Labor Cats / Jobs

Configuration Instructions

Follow these steps to configure this module:

1. Log into the NorthStar Portal.
2. Navigate to Dimension Setup or add it to the desired tab.
3. Select a Dimension tab to setup.
4. Enter values for the given dimension.
5. Click [Add](#) to add the dimension entry to the tab.
6. Continue adding dimension values until finished and then proceed to the next tab.

Dimension Setup


Dimension Setup 

Day Parts | Sales Cats | Rev Centers | Labor Groups | Labor Centers | Labor Cats

Day Part Setup

Lunch	Day Part ID:	1
Afternoon	Title:	Lunch
Dinner	Shift Number:	1
Evening	Abbreviation:	Lunch
	Sort Order:	1

[Add](#) [Update](#) [Delete](#)

Dimension Setup 

Day Parts | Sales Cats | Rev Centers | Labor Groups | Labor Centers | **Labor Cats**

Labor Categories Setup

Server	Labor Cat ID:	7
Kit Mgr	Title:	Server
Cook	Labor Center:	Front of House
GM	Relative Sales Cat:	All Categories
Driver	Alt Job Code:	1000
Training		
Del Dispatch		
Salad		
Asst. Mgr		
Shift Leader		
Office		

[Add](#) [Update](#) [Delete](#)

Franchise Manager

Module Type

Admin

The Franchise Manager Module is an administrative utility that encapsulates all of the franchise management into a single module to setup and maintain the associated reports for franchises.

Install Type

Default

Usage

Integration

Configuration Instructions

Follow these steps to configure this module:

Sorting Options

N/A

1. Log into the NorthStar Portal.
2. Navigate to Franchise Manager or add it to the desired tab.
3. Enter Royalty Percent Description and Base % on the Global Settings tab.
4. Enter Base % for units that are different than the default on the Unit Settings tab.
5. Add Scheduled Closed Days and Standard Business Days on the Unit Calendar tab.
6. Click [Apply Changes](#) to post changes made on any tab.

Business Process**Dependency**

N/A

Franchise Manager

Franchise Manager

Global Settings | Unit Settings | Unit Calendar

Set Global Defaults

Royalty Percent Description	Base %
Royalties - General	6.0000
	0.0000
	0.0000
	0.0000
	0.0000

[Apply Changes](#)

Franchise Manager

Global Settings | Unit Settings | Unit Calendar

Unit List

- Fudd-006
- Test_001
- Test_002
- Test_003
- xyz
- zdooxxx
- zGootch
- ztest
- ztest1

Quick Help
Enter a Date Opened and Comp Date for each unit.
Optional: Enter a base percentage for each unit that is different than the default.

Dates
Date Opened:
Comp. Date:

Royalty Percent Settings

Royalty Percent Description	Unit %	Base %	Code
Royalties - General		6.0000	
		0.0000	
		0.0000	
		0.0000	
		0.0000	

[Apply Changes](#)

Security Defaults

Module Type

Admin

The Security Defaults Module allows Admins to set the default privileges for the Portal tabs and modules.

Install Type

Default

Configuration Instructions

Follow these steps to configure this module:

Usage

Default Access Rights

1. Log into the NorthStar Portal.
2. Navigate to Security Defaults or add it to the desired tab.
3. Click the checkbox of the Role to grant default tab authorization or module edit rights.
4. Click [Change](#) to update Access Rights by org type.
5. To save your changes, click [Save Defaults](#).

Sorting Options

N/A

Business Process

Dependency

N/A

Setup Default Security

Portal Default Privileges

Use the settings below to set the default privileges for the NorthStar Portal. These settings are applied when you add new tabs, or add new modules to tabs. For example, under the Module Edit Roles section if you check Admins, then every time you add a module to a tab, Admins will have the edit privilege for that tab.

Tab Authorized Roles

All Users Accounting Users
 Admins

Module Edit Roles

All Users Accounting Users
 Admins

Tab and Module Access Rights

Org Type	Organization	Right	Del
Authenticated	Any	Any	X

[Change](#)

[Save Defaults](#)

Advanced Portal Modules

This section includes information and examples of the Advanced Portal Modules that are part of a Default NorthStar Portal installation.

The following Advanced Modules are explained:

[Ad-Hoc Query](#)
[XML/XSL](#)

Ad-Hoc Query

Module Type

Advanced

Install Type

Default

Usage

Database Lookup

Sorting Options

N/A

Business Process

Dependency

N/A

The Ad-Hoc Query Module gives advanced users the option to run any SQL script against the database, for data lookup or editing. By default, it displays the unit number, region and district for all units. Use of this module should only be attempted by a professional.

Configuration Instructions

Follow these steps to configure this module:

1. Log into the NorthStar Portal.
2. Navigate to Ad-Hoc Query or add it to the desired tab.
3. Click the pencil in the top-right corner of the module to change the SQL statement.
4. Enter a SQL statement, click [Update](#) when finished.
5. The query results are now displayed. To reset it back to default, delete the SQL statement.
6. If data is changed or deleted, it is not reversible.

Unit #.....	Unit Region.....	Unit District.....
001	R2	D3
002	R2	D3
003	R2	D3

TRANS_NO	CHECK_NO	SEQ_MAIN	INV_NUMBER	REALPRICE
366	267	1	927	1
221	172	3	927	1
166	128	4	927	1
189	152	5	927	1

Ad-Hoc Query Editor

This module is for advanced users only. Improper use can cause irreparable damage to your system.

SQL Statement:

```
Select TRANS_NO, CHECK_NO, SEQ_MAIN, INV_NUMBER, REALPRICE
from tblTranMainItem
where unitnum = '001'
and SalesDate = '3/3/2011'
and REALPRICE BETWEEN 0.01 AND 1.01
Order By REALPRICE DESC
```

[Update](#) [Back](#)

XML/XSL

Module Type

Advanced

The XML/XSL Module is an advanced module that allows a user to view the output of an XML file, formatted by the XSL (xslt) transform file.

Install Type

Default

Configuration Instructions

Follow these steps to configure this module:

Usage

XML Formatting

1. Log into the NorthStar Portal.

Sorting Options

N/A

2. Navigate to XML\XSL or add it to the desired tab.

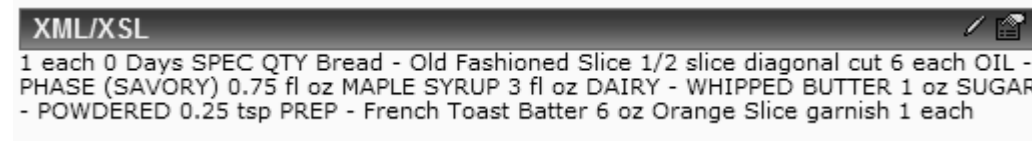
3. Click the pencil button in the top-right corner to edit the XML Settings.

Business Process**Dependency**

N/A

4. Enter the URL location of the XML Data File and the XSL/T Transform File.

5. Click [Update](#) when finished.



The screenshot shows the XML Settings dialog box. It has two input fields: XML Data File: ~/Uploads/FrenchToast.xml and XSL/T Transform File: ~/Uploads/Transform.xslt. At the bottom, there are buttons for Update and Cancel.

Optional Portal Modules

This section includes information and examples of the Optional Portal Modules that are not part of a Default NorthStar Portal installation, and must be installed via the Portal Config Module Installer. Both Portal and Portal Config need to be updated to the current version.

The following Optional Modules are explained:

[Dynamic Grid](#)

[Extended Commit Grid](#)

[Comp Sales](#)

[Financial Estimator](#)

[Item Group Manager](#)

[Labor Cost Analysis Setup](#)

Dynamic Grid

Module Type

Optional

Install Type

Portal Config Module
Installer

Usage

Interactive Report
Data Filter/Sort

Sorting Options

ASC/DESC All Columns
Column Head Grouping

Business Process

Dependency

N/A for Module
Varies By Report

Available Reports

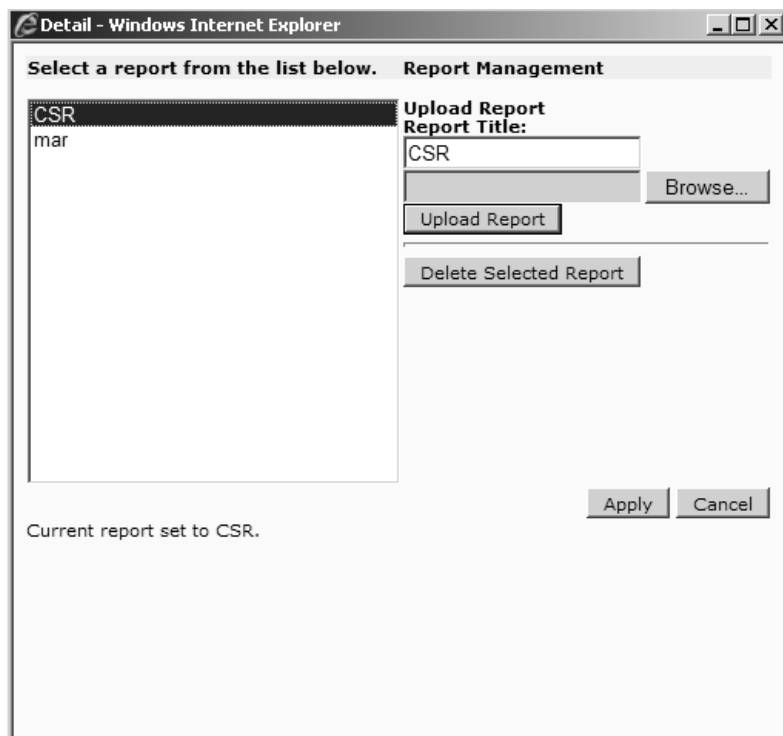
Check Search
Manager Activity
Payroll Punch Detail

The Dynamic Grid Module is an interactive reporting tool that gives the user advanced sorting and filtering options. Dynamic grid reports can be filtered and sorted dynamically from a full report to a single row. Report data can be exported to a CSV file for the currently displayed page or for all pages.

Configuration Instructions

Follow these steps to configure this module:

1. Log into the NorthStar Portal.
2. Navigate to Dynamic Grid or add it to the desired tab.
3. Click [Edit](#) in the top-right corner to add a report.
4. Enter a Title and [Browse](#) for the report (xml) file.
5. Click [Upload Report](#), then select the report in the list and click [Apply](#) to select a report to run in the Dynamic Grid.
6. Close the window, select the Report Parameters and click the [Go](#) button.



Dynamic Grid

Dynamic Grid

Report Parameters: National: All Locations Start: 4/1/2011 End: 4/20/2011 Find Items: ... GO Export CSV: Full Page

Date

Unit #	Open	Close	Check #	Table #	Server #	Amount	Tax	Total	Cost Cents	Server	# Par	Discount	Disc.5	Payment Types
SalesDate: 4/1/2011 12:00:00 AM (Displaying 10 of 101 records - This group is continued on the next page)														
001	1848	200828	202	14	51	\$83.30	\$7.71	\$91.01	DINE IN	Emp# 51	3	NONE	0	CASH
001	1151	130122	20	10	53	\$78.35	\$7.25	\$85.60	DINE IN	Emp# 53	10	NONE	0	CASH
001	1200	130302	25	20	79	\$72.15	\$6.67	\$78.82	DINE IN	Emp# 79	5		3	M/C, M/C, CASH
001	1305	132451	52	996	1	\$57.20	\$5.29	\$62.49	TAKE OUT	Emp# 1	1	NONE	0	CASH
001	1932	202802	248	17	23	\$53.75	\$4.97	\$58.72	DINE IN	Emp# 23	5	NONE	0	CASH
001	1752	183055	159	994	145	\$47.15	\$4.36	\$51.51	GAME ROO	Emp# 145	1	NONE	0	CASH
001	1136	122125	15	995	195	\$43.25	\$4.00	\$47.25	GAME ROO	Emp# 195	1	NONE	0	CASH
001	1912	191249	220	997	1	\$39.85	\$3.69	\$43.54	TAKE OUT	Emp# 1	1	NONE	0	CASH
001	1449	155216	81	10	53	\$39.65	\$3.67	\$43.32	DINE IN	Emp# 53	3	NONE	0	CASH
001	1903	200257	218	1	18	\$39.40	\$3.64	\$43.04	DINE IN	Emp# 18	4	NONE	0	CASH

Records per page: 10 Apply Filter | Hide Filter | Remove Filter - Records: 1 - 10 of 841 - Pages: 1 | 2 | 3 | 4 | 5

Filter Items: Unit 001

All Items

- (194) 5OZ CAESAR DRESSING
- (328) S INHS CAESAR DRESSING
- (375) L INHS CAESAR DRESSING
- (394) LARGE CAESAR SALAD
- (395) HALF CAESAR SALAD
- (395) ONLY LG CAESAR
- (403) 3OZ CAESAR DRESSING
- (452) HALF CAESAR
- (489) NO LG CAESAR SALAD
- (501) WITH LG CAESAR SALAD
- (670) EXTRA LG CAESAR SALAD
- (719) SM CAESAR SALAD
- (719) LARGE CAESAR SALAD
- (1113) PINT CAESAR DRESSING
- (1271) PTY CAESAR
- (1272) CAESAR SALAD TRAY
- (1492) ONLY CAESAR
- (1493) NO CAESAR
- (1494) WITH CAESAR

Caesar Search

Filter Items

- (395) HALF CAESAR SALAD

OK Cancel

Detail - Windows Internet Explorer

http://insportaltemplate.northstarenterprise.com/NorthStar.DynamicGrid/DynamicGridPopUp.aspx?ctrl=

Check #1 Detail

Unit: 001, 3/27/2011

Check #: 1 Table #: 11

Check Date: 3/27/2011 Guests: 2

Open Time: 11:04 AM Opened By: MELISSA NELSON

Close Time: 12:30 PM Closed By: MELISSA NELSON

Item #	Description	Comp User	Sent	Gross	Discount	Net
322	S INHS 1000 ISLAND		12:00 AM	\$0.00	\$0.00	\$0.00
43	SOUP CUP		11:04 AM	\$3.00	\$0.00	\$3.00
767	COFFEE		11:04 AM	\$2.50	\$0.00	\$2.50
43	SOUP CUP		11:04 AM	\$3.00	\$0.00	\$3.00
395	HALF CAESAR SALAD		11:04 AM	\$4.95	\$0.00	\$4.95
388	MARYS HOUSE SALAD		11:04 AM	\$5.25	\$0.00	\$5.25
Total: \$18.70						

Tax Code	Amount
1	\$1.73

Payment Type	Pay Memo	Amount	Tip	Change	Total
AMEX	565448,xxxxxxxxxxxx1007,xx/xx, 20.43	\$20.43	\$3.00	\$0.00	\$23.43

Done Internet | Protected Mode: On 100%

Extended Commit Grid

Module Type

Optional

Install Type

Portal Config Module
Installer

Usage

Commit Details

Sorting Options

ASC/DESC All Columns

Business Process

Dependency

Great Plains eConnect
Daily, Inventory, AP,
Bank Reconciliation &
Payroll Commit

The Extended Commit Grid Module displays the latest Commit Date/Time and the Business Date or Period-End Date for the following commits: Daily, Payroll, Inventory Variance, AP, & Bank Reconciliation. Each commit record has a status color indicating that the commit is on time (green), late (yellow) or old (red).

Configuration Instructions



Follow these steps to configure this module:

1. Log into the NorthStar Portal.
2. Navigate to Extended Commit Grid or add it to the desired tab.
3. Click [Edit](#) in the top-right corner to setup the Commit Grid Parameters.
4. Click [Update](#) then [Close](#) after parameters are set.
5. Great Plains eConnect has to be setup in Desktop and the data committed for the grid to populate.

Commit Grid Parameters	
DSR Days Back:	<input type="text" value="1"/>
DSR Hr Due In:	<input type="text" value="10:00 AM"/>
Purchases Days Late:	<input type="text" value="2"/>
Purchases Days Overdue:	<input type="text" value="4"/>
Payroll Days Back:	<input type="text" value="7"/>
Payroll Hr Due In:	<input type="text" value="11:00 AM"/>
Inv. Var Day of Week:	<input type="text" value="Monday"/>
Inv. Var Hr Due In:	<input type="text" value="2:00 PM"/>
Bank Rec Days Back:	<input type="text" value="1"/>
Bank Rec Hr Due In:	<input type="text" value="11:00 AM"/>

[Update](#) [Cancel](#) [Close](#)

Extended Commit Grid

Extended Commit Grid Edit 																
Select Organization To View:													National: National 			
Unit Num	Daily		Payroll		Inv. Var		AP		Bank Rec		Integration			Bank Rec		
	BusDate	Commit	PeriodEnd	Commit	PeriodEnd	Commit	BusDate	Commit	BusDate	Commit	POS	Daily	Daily Inv.		LAB	Var
02	11/11/2010	11/11 10:28 PM	10/31/2010	11/01 08:50 AM	11/7/2010	11/08 12:25 PM						<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
03	11/11/2010	11/12 12:45 AM	10/31/2010	11/01 01:47 PM	11/7/2010	11/08 12:05 PM						<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
05	11/11/2010	11/12 07:02 AM	10/31/2010	11/01 12:38 AM	11/7/2010	11/07 11:39 PM						<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
06	11/11/2010	11/11 10:33 PM	10/31/2010	10/31 11:10 PM	11/7/2010	11/08 01:36 PM						<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
08	11/11/2010	11/12 12:09 AM	10/31/2010	11/01 07:45 AM	11/7/2010	11/08 07:26 AM						<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10	11/11/2010	11/11 10:23 PM	10/31/2010	11/01 09:34 AM	11/7/2010	11/08 09:54 AM						<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
11	11/11/2010	11/11 10:34 PM	10/31/2010	11/01 08:12 AM	11/7/2010	11/08 01:23 PM						<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
12	11/11/2010	11/11 10:16 PM	10/31/2010	11/01 09:11 AM	11/7/2010	11/08 04:18 PM						<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
13	11/11/2010	11/11 10:51 PM	10/31/2010	11/01 07:22 AM	11/7/2010	11/08 02:35 PM						<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
21	11/11/2010	11/11 10:29 PM	10/31/2010	11/01 03:53 PM	11/7/2010	11/08 11:47 AM						<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
22	11/11/2010	11/11 10:55 PM	10/31/2010	11/01 10:20 AM	11/8/2010	11/08 09:09 AM						<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
23	11/11/2010	11/11 10:39 PM	10/31/2010	11/01 04:03 PM	11/7/2010	11/08 12:23 PM						<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
24	11/11/2010	11/11 10:28 PM	10/31/2010	11/01 08:58 AM	11/7/2010	11/07 10:11 PM						<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
25	11/11/2010	11/11 10:47 PM	10/31/2010	11/01 02:46 PM	11/7/2010	11/08 10:14 AM						<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
26	11/11/2010	11/11 11:09 PM	10/31/2010	11/01 04:00 AM	11/7/2010	11/08 01:04 AM						<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
41	11/11/2010	11/11 10:58 PM	10/31/2010	11/01 12:50 AM	11/7/2010	11/08 08:36 AM						<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
42	11/11/2010	11/12 07:21 AM	10/31/2010	11/01 11:28 AM	11/7/2010	11/08 11:59 AM						<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Comp Sales

Module Type

Optional

Install Type

Portal Config Module
Installer

Usage

Comparative Reporting

Sorting Options

ASC/DESC All Columns

Business Process

Dependency

Daily Commit
Comp Report Creation
via Portal Config
Aggregate Config
Desktop EID Setup
Unit Comp Date must
be after "1/1/1900"

The Comp Sales Module allows the user to display a Comparative Sales statistic report by defining Variance Types to Element ID values, created in Portal Config. Unit Exclusions are used to exclude a units comparable status for a given day and explanation and are shown separately, in a report below. Variance Types are: % Variance, # Difference, \$ Difference & % Difference.

The content of the columns are:

- Status (Comparable Unit Status)
 - Comp (Comparable and Committed)
 - AS (Comparable and Auto-Sent)
 - Non-C (Non-Comparable Unit)
 - Excluded (Unit Exclusion)
- Num (Unit Number)
- Name (Unit Name)
- Organization (Region : District)
- Explanation (Exclusion Explanation)
- Day (Current Day's value by type)
- Day LY (Last Year Day value by type)
- Var (Variance value by type)
- WTD (Week to Date value by type)
- WTD LY (Last Year Week to Date value by type)
- PTD (Period to Date value by type)
- PTD LY (Last Year Period to Date value by type)
- YTD (Year to Date value by type)
- YTD LY (Last Year-Year to Date value by type)

Configuration Instructions

Follow these steps to configure this module:

1. In Portal Config, click on [Comp Report Admin](#).
2. Select [Comp Sales](#) (*under Modules*) and enter a Report Title.
3. Select an Element ID and a Variance Type.
4. Click [Add](#) and wait for the aggregate to finish.
5. Log into Portal, navigate to Comp Sales or add it to the desired tab.
6. Choose a date, organization and report selection.
7. Click [Run Report](#).

Comp Sales

Comp Sales

4/27/2011 For: District: California Report Selection: Gross Sales Run Report

Status	Num	Name	Organization	Day	Day LY	Var	WTD	WTD LY	Var	PTD	PTD LY	Var	YTD	YTD LY	Var
Comp	001	Test_001	PacCA	7,161.47	5,701.02	1,460.45	19,431.75	13,823.19	5,608.56	19,431.75	13,823.19	5,608.56	80,621.78	937,911.18	857,289.40
AS	002	Test_002	PacCA	3,292.07	2,216.66	1,075.41	9,346.65	8,167.24	1,179.41	9,346.65	8,167.24	1,179.41	293,437.22	605,878.40	313,441.18
AS	003	Test_003	PacCA	2,191.54	2,361.37	-169.83	6,862.49	5,746.82	1,115.67	6,862.49	5,746.82	1,115.67	34,374.08	343,295.95	308,921.87
Comparable Totals (0 of 3)				12,635.08	10,279.05	2,356.03	35,640.89	27,737.25	7,903.64	35,640.89	27,737.25	7,903.64	408,433.08	1,888,085.53	1,479,662.45
Non-Comp and Excluded Totals				0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Grand Total (0 of 3 Units Reporting)				12,635.08	10,279.05	2,356.03	35,640.89	27,737.25	7,903.64	35,640.89	27,737.25	7,903.64	408,433.08	1,888,085.53	1,479,662.45

NorthStar Portal Configuration

File Tools Help

Portal Config

- Home
- Licensing

Date Time Setup

- Fiscal Calendar
- Day Parts

Server Tools

- Report Management
- Module Installer
- Comp Report Admin
- Query Tool

Support

Configure Comp Reports By Module

Modules: Comp Sales

Reports: Food DR % Var, Gross Sales

Report Title: Food DR % Var

Element ID: Element ID 10: Food:Dining Room

Variance Type: % Variance

Buttons: Move Up, Move Down, Delete, Add, Update

Manage Unit Exclusions

Unit 001: Test_001

Unit 002: Test_002

Unit 003: Test_003

Start Date: Saturday, December 25, 2010

End Date: Saturday, December 25, 2010

Explanation: Closed for Christmas

StartDate	EndDate	Explanation
12/25/2010	12/25/2010	Closed for Christmas

Buttons: Add, Update, Delete

Idle

Financial Estimator

Module Type

Optional

Install Type

Portal Config Module
Installer

Usage

P&L Report Config

Sorting Options

N/A

Business Process

Dependency

GL Accounts setup in
NorthStar P&L
Configuration Manager
Daily Commit

The Financial Estimator Module is used in conjunction with the NorthStar P&L Configuration Manager application to setup GL Accounts for entering financial estimates that are used by P&L financial reports.

The content of the columns are:

- GLAcctNum (GL Account Number)
- Description (GL Account Description)
- Amount (Estimate Amount)
- Explanation (Estimate Explained)

Configuration Instructions

Follow these steps to configure this module:

1. Start NorthStar P&L Configuration Manager.
2. Click the [Manage GL Accounts](#) button.
3. Enter the Number, Description and select an Estimate Line Type for each GL Account.
4. Log into Portal, navigate to Financial Estimator or add it to the desired tab.
5. Select a Unit, Period and Week Ending Date.
6. Select a GL Account from the Description list.
7. Enter an Estimate in the Amount field.
8. Enter an Explanation for the Account estimate.
9. Click the [Add](#) link.
10. To edit an entry, click on the [Amount](#).

Financial Estimator

Financial Estimator

Unit: Period: Week Ending:

GLAcctNum	Description	Amount	Explanation
<i>Add new Estimate</i>	<input type="text" value="Retail"/>	\$ <input type="text"/>	<input type="text"/>
4000	Food	\$1,000.00	Explanation
4001	Beverages	\$500.00	Explanation
Totals:		Amount	

Next

NorthStar P&L Configuration Manager - [Available GL Account Maintenance]

GL Account Number	GL Account Description	Estimate Line Type
4000	Food	Estimates Only In Open Periods, Closed Period Spread Actuals Across Weeks
4001	Beverages	Financial Data + Estimates In Open Periods, Financial Data Only in Closed Periods
4002	Discounts	Financial Data Only, No Estimates Allowed
4003	Retail	Use Budgets Across Weeks In Open Periods Until Actuals Post, Spread Actuals Across Weeks

Record: 5 of 5

Form View NUM

NorthStar P&L Configuration Manager - [NorthStar P&L Manager]

NorthStar P&L Configuration Manager

Configuration Management

- Manage GL Accounts
- Manage P&L Reporting Rows
- Manage P&L Report Configuration
- Manage P&L Closed Periods

Reports

- GL Account Details
- Reporting Row Details
- P&L Report Structure
- P&L Report Line Details

Utilities

- Database Connectivity
- AccPac Financial System Translation Management
- Exit

Form View NUM

Item Group Manager

Module Type

Optional

Install Type

Portal Config Module
Installer

Usage

Item Grouping

Sorting Options

N/A

Business Process

Dependency

Daily Commit

The Item Group Manager Module allows you to create item groups and to associate those item groups to specific units. To associate an item group to an entire district or region, drag-and-drop the item group to a region or district folder.

The content of the columns are:

- Units (by organizational structure)
 - Region
 - District
 - Unit
- Item Groups
- Items

Configuration Instructions

Follow these steps to configure this module:

1. Log into NorthStar Portal.
2. Navigate to Item Group Manager or add it to the desired tab.
3. Create Item Groups by entering a group name and then clicking the [Add List Group](#) button.
4. Add items to the groups by selecting from the drop down and clicking the [Arrow](#) button.
5. Drag the Item Group to the desired unit, district or region.

Item group Manager

Item Group Manager

This module allows you to create item groups and to associate those item groups to specific units. To associate an item group to an entire district or region, drag-and-drop the item group to a region or district folder.

Units	Item Groups	Items												
<p>Organization</p> <ul style="list-style-type: none">R2<ul style="list-style-type: none">D3<ul style="list-style-type: none">Test_001<ul style="list-style-type: none">Group 1Test_002<ul style="list-style-type: none">Group 2Test_003<ul style="list-style-type: none">Group 3	<input type="text"/> Item Groups <ul style="list-style-type: none">Group 1Group 2Group 3	<p>Add Item (744) HARD SALAMI SAND IN</p> <table border="1"><thead><tr><th>Item #</th><th>Description</th><th></th><th></th></tr></thead><tbody><tr><td>4071</td><td>SWEDISH MEATBALLS</td><td>x</td><td></td></tr><tr><td>744</td><td>HARD SALAMI SAND IN</td><td>x</td><td></td></tr></tbody></table>	Item #	Description			4071	SWEDISH MEATBALLS	x		744	HARD SALAMI SAND IN	x	
Item #	Description													
4071	SWEDISH MEATBALLS	x												
744	HARD SALAMI SAND IN	x												

Labor Cost Analysis Setup

Module Type

Optional

Install Type

Portal Config Module
Installer

Usage

Labor Cost Analysis
Report Config

The Labor Cost Analysis Setup Module is an advanced configuration tool for the Labor Cost Analysis report, which gives users the visibility, on a per week basis, key data points, including weekly average, budget and actual sales, budgeted and actual labor cost and hours, cost percentages and variances. Revenue Groups are defined by combining Labor Departments, Cost Centers and Sales Categories. Each group is assigned sales and labor thresholds and daily budget amounts by week ending date.

Sorting Options

N/A

The tabs and main function are:

- Create Revenue Groups
 - Grouping of Labor Departments
- Configure Revenue Groups
 - Assign Sales Categories by Cost Center
- Budget Groups
 - Enter daily budgets by week ending date
- Threshold Values
 - Define Sales \$ and Labor % Thresholds

Business Process

Dependency

Daily/Payroll Commit

Configuration Instructions

Follow these steps to configure this module:

1. Log into NorthStar Portal, navigate to Labor Cost Analysis Setup or add it to the desired tab.
2. Create Revenue Groups tab; select Unit # and click the [Create New](#) button.
3. Change the group name from New Group to a name that will easily define it.
4. Select Labor Departments (a labor dept. can only be assigned to one group, while a group can have multiple labor depts.). Click [Update](#) when finished.
5. Configure Revenue Groups tab; select Unit #, Sales Categories to assign to the Cost Centers of the Revenue Group and click the [Save](#) button.
6. Budget Groups tab; select Unit # and week ending date, click [Edit](#), enter budget amounts and [Update](#).
7. Threshold Values tab; select Unit #, click [Edit](#), enter sales (\$) and labor (%) threshold amounts and [Update](#).
8. Run the Labor Cost Analysis report.

Labor Cost Analysis Setup

Labor Cost Analysis Setup

Unit # Revenue Group Name Labor Departments

KITCHEN
 WAIT
 FLOOR
 COUNTER
 BENEFITS
 DELIVERY
 PAINTING

Revenue Groups: Kitchen, **FOH**, Delivery

Labor Cost Analysis Setup

Unit # Revenue Groups: Kitchen, **FOH**, Delivery

Cost Centers: **DINING ROOM**, COUNTER, CATERING, TRAINING, DELIVERY

Sales Categories: BEVERAGE, FOOD

Labor Cost Analysis Setup

Unit # Week Ending Date: April 2011

		Rev #	Rev Group	3/27/2011	3/28/2011	3/29/2011	3/30/2011	3/31/2011	4/1/2011	4/2/2011
27	28	29	30	31	1	2				
3	4	5	6	7	8	9				
10	11	12	13	14	15	16				
17	18	19	20	21	22	23				
24	25	26	27	28	29	30				
1	2	3	4	5	6	7				
Edit	1	Kitchen		1234.00	1234.00	1234.00	1234.00	1234.00	1345.00	1400.00
Edit	2	FOH		1050.00	1050.00	1050.00	1050.00	1050.00	1175.00	1200.00
Edit	3	Delivery		200.00	200.00	200.00	200.00	200.00	250.00	275.00

Labor Cost Analysis Setup

Unit #

Revenue Group	Less Than (Bad)	Up To (Good)	Over (Super)	Edit
Kitchen	\$16,000.00	\$18,000.00	\$18,000.00	Edit
FOH	\$12,000.00	\$15,000.00	\$15,000.00	Edit
Delivery	\$12,000.00	\$15,000.00	\$15,000.00	Edit

Labor Department	Revenue Group	Less Than (Bad)	Up To (Good)	Over (Super)	Edit
KITCHEN	Kitchen	1.20%	1.30%	1.40%	Edit
WAIT	FOH	1.10%	1.15%	1.20%	Edit
FLOOR	FOH	1.10%	1.15%	1.20%	Edit
COUNTER	FOH	0.91%	0.95%	0.99%	Edit
DELIVERY	Delivery	1.50%	1.60%	1.70%	Edit
Overall		5.81%	6.15%	6.49%	

