NorthStar Portal Modules

7/14/2011

Contents

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

Module Type
Standard

Install Type
Default

Usage
Announcements

Sorting Options
N/A

Business Process Dependency
N/A

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

New Announcement Detail fields are:

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

Configuration Instructions

Follow these steps to configure this module:

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.

Contacts

Module Type
Standard

Install Type
Default

Usage
Contact Info

Sorting Options
N/A

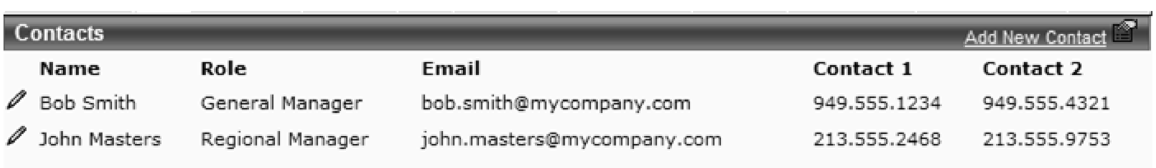
Business Process Dependency
N/A

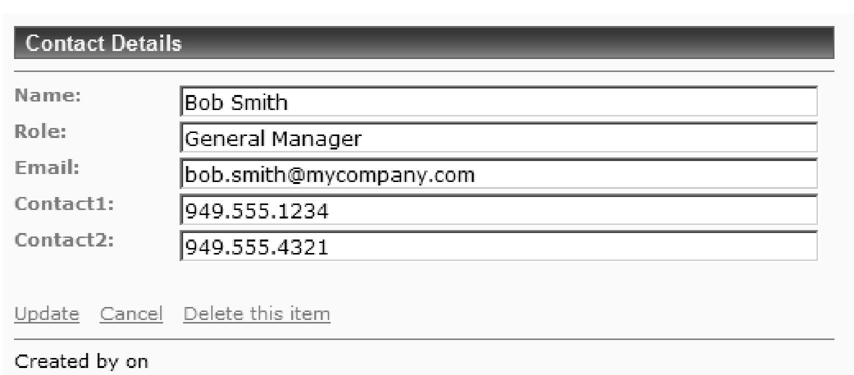
The Contacts Module displays the Name, Role, Email, and Contact Phone Numbers for the added contacts.

Configuration Instructions

Follow these steps to configure this module:

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.





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.

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

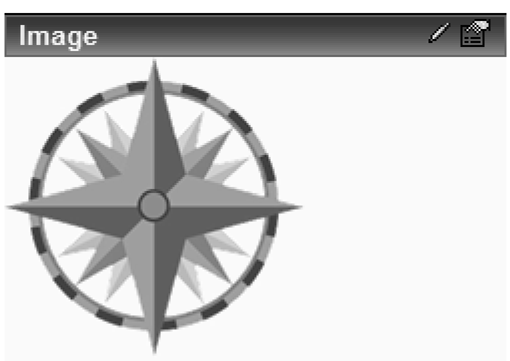
Business Process Dependency
N/A

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.



Links

Module Type
Standard

Install Type
Default

Usage
Internet Links

Sorting Options
View Order #

Business Process Dependency
N/A

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

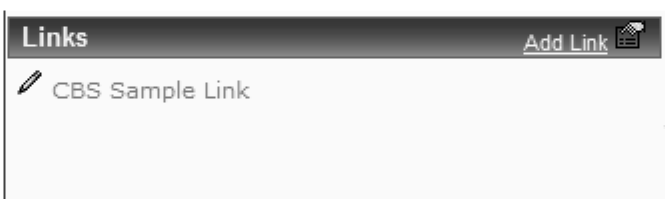
Details are as follows:

- 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.

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.



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.

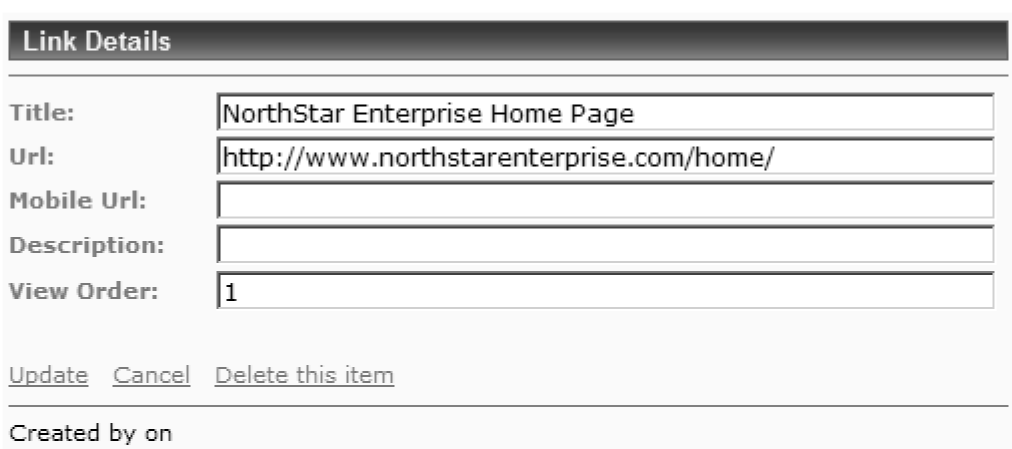
2. Navigate to Quick Links or add to the desired tab.

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.



Documents

Module Type
Standard

Install Type
Default

Usage
Documentation Access

Sorting Options
N/A

Business Process Dependency
N/A

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

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.

Configuration Instructions

Follow these steps to configure this module:

1. Log into the NorthStar Portal.

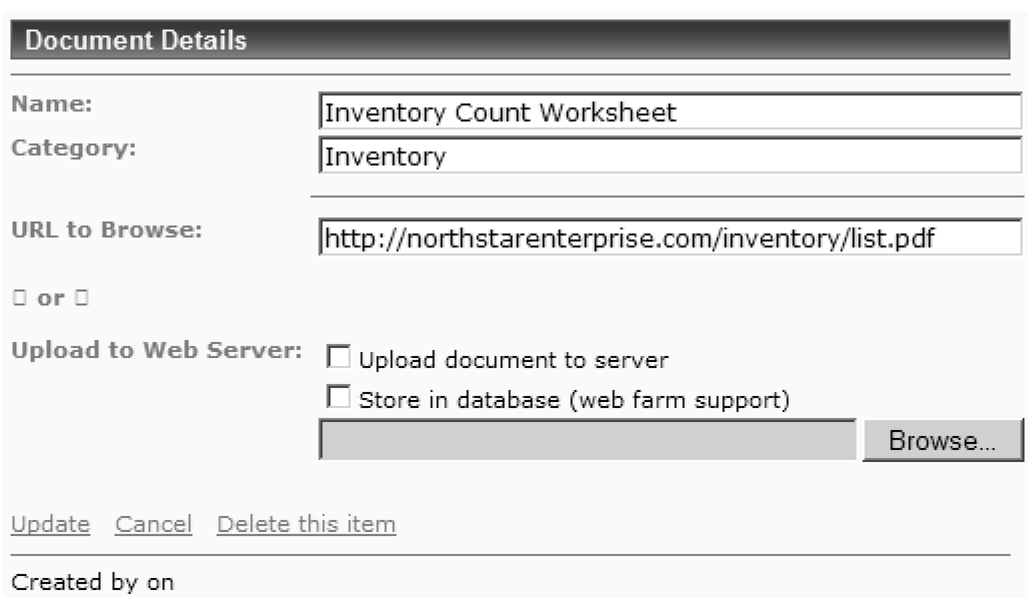
2. Navigate to Documents or add it to the desired tab.

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.



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.

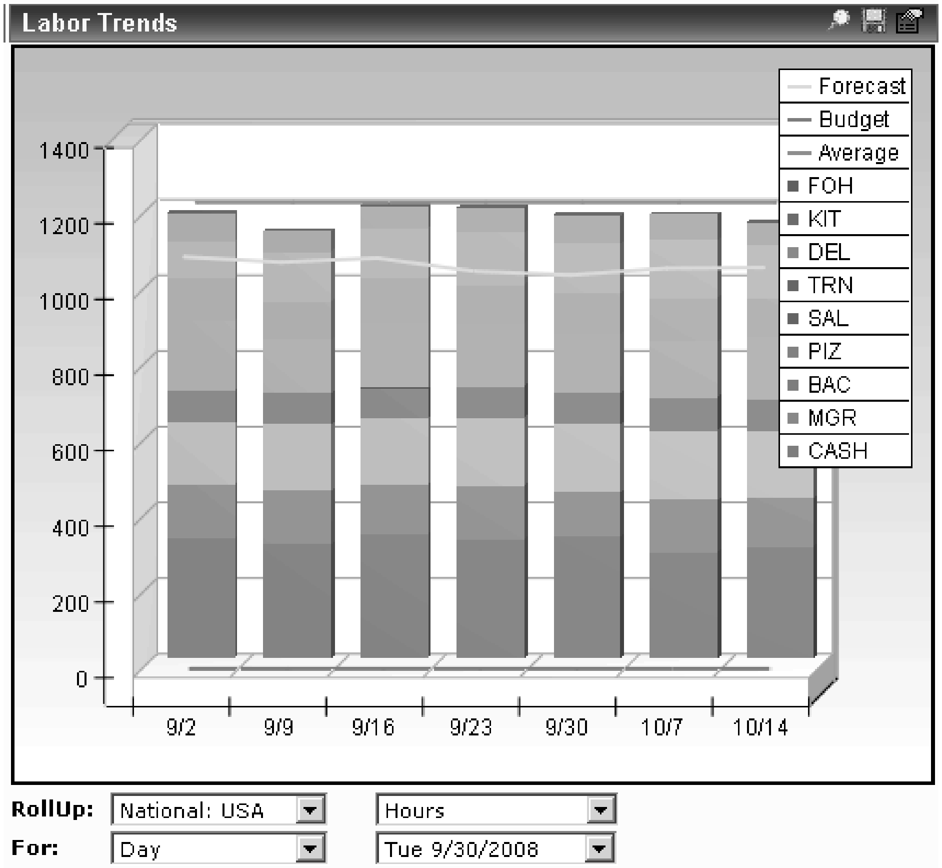
3. Click the properties button in the top-right corner of the module.

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.

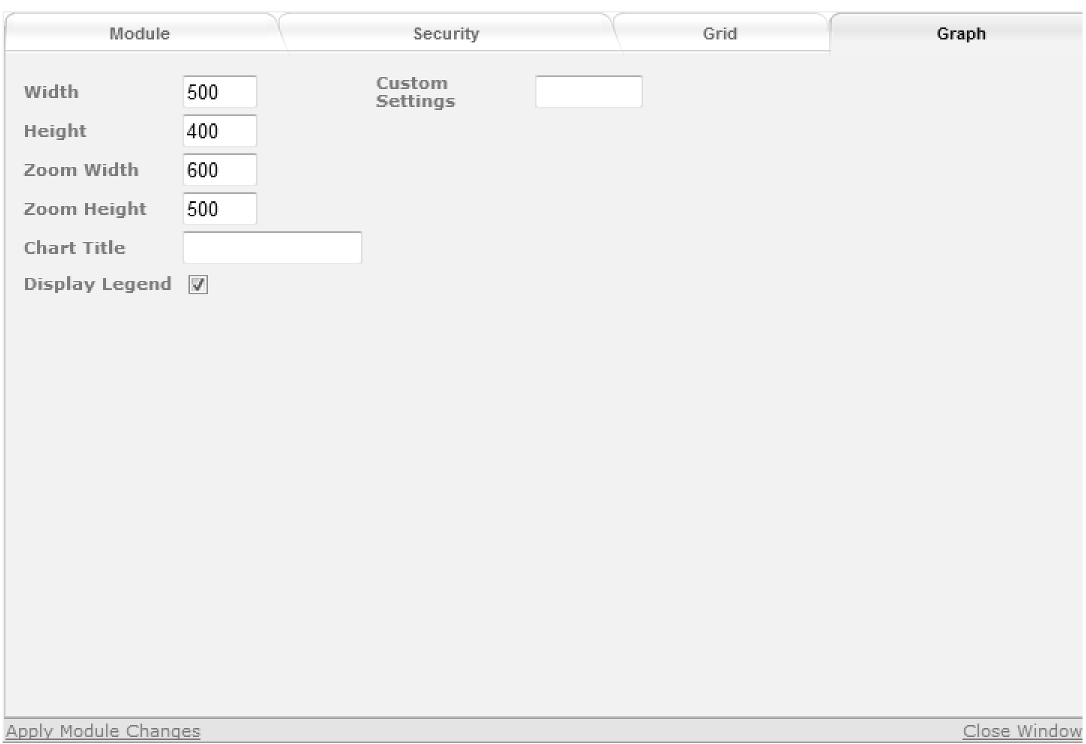
5. Click Apply Module Changes when finished, and then click Close Window.

6. Select Roll-Up options for the desired graph output.

Labor Graph



Labor Trends
Forecast
Budget
Average
FOH
KIT
DEL
TRN
SAL
PIZ
BAC
MGR
CASH
1400
1200
1000
800
600
400
200
0
9/2
9/9
9/16
9/23
9/30
10/7
10/14
RollUp:
National: USA
Hours
For:
Day
Tue 9/30/2008



Module
Security
Grid
Graph
Width
500
Height
400
Zoom Width
600
Zoom Height
500
Chart Title
Display Legend
Custom Settings
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:

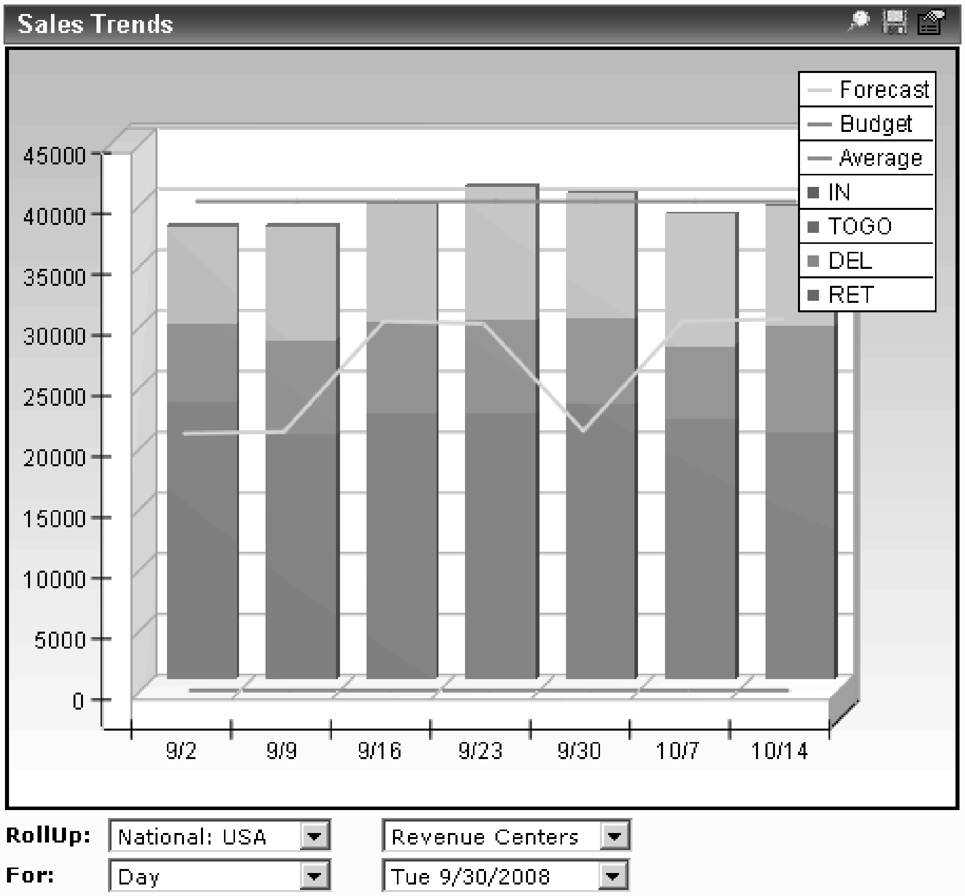
- Report On:
  - National
  - District
  - Region
  - Unit
- Report Type:
  - Revenue Centers
  - Day Parts
  - Sales Categories
- Dates Selection:
  - Period
  - Week
  - Day

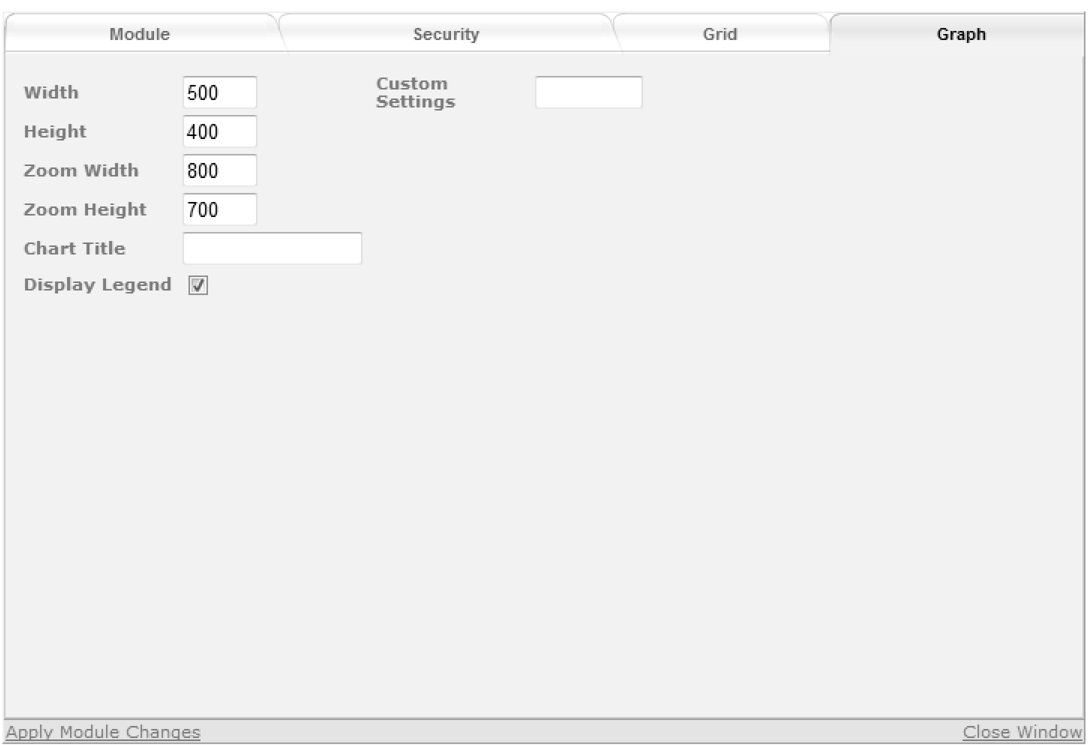
Configuration Instructions

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


Sales Trends
Forecast
Budget
Average
IN
TOGO
DEL
RET
45000
40000
35000
30000
25000
20000
15000
10000
5000
0
9/2
9/9
9/16
9/23
9/30
10/7
10/14
RollUp:
National: USA
Revenue Centers
For:
Day
Tue 9/30/2008


Module
Security
Grid
Graph
Width
500
Height
400
Zoom Width
800
Zoom Height
700
Chart Title
Display Legend
Custom Settings
Apply Module Changes
Close Window

Daily Sales Flash

Module Type
Standard

Install Type
Default

Usage
Sales Summary

Sorting Options
ASC/DESC All Columns

Business Process Dependency
Daily Commit
Mission Control
Aggregate Config

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.

The content of the columns are:

- 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)

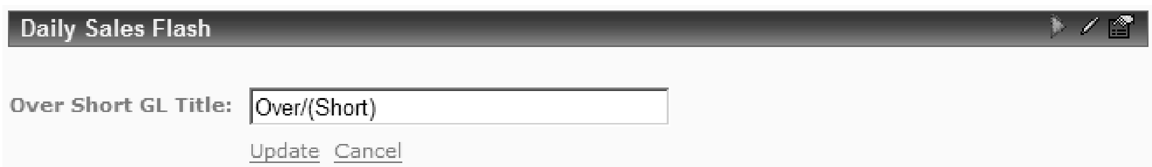
Configuration Instructions

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

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



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.

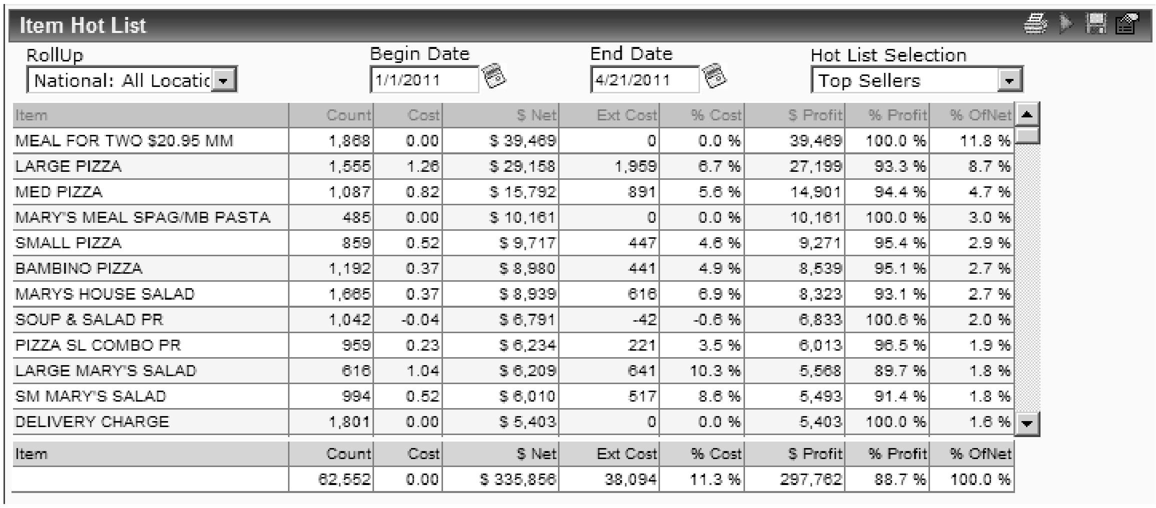
3. Click the Properties button in the top-right corner of the module and go to the Hot Lists tab.

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.

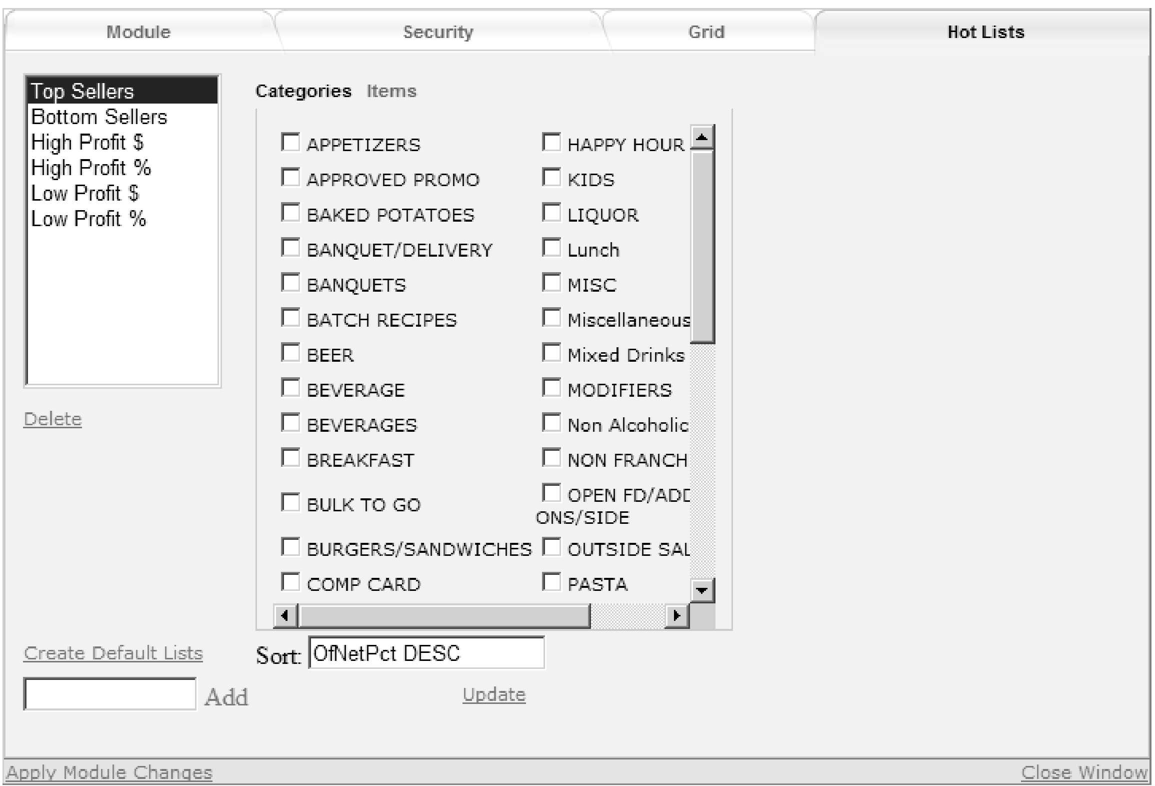
Item Hot List



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	1.26	$ 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 %



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.

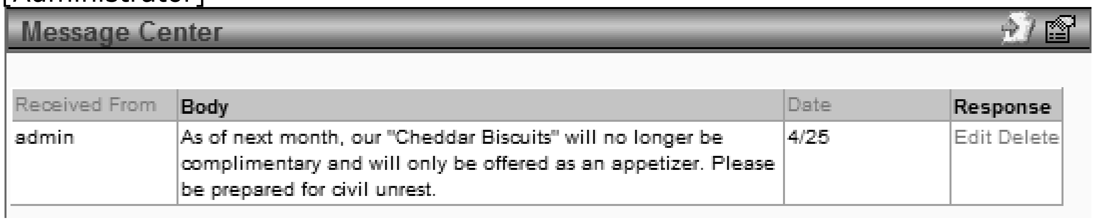
5. On the Recipients tab, add the organizations that have access to the message.

6. Click Post Message when finished.

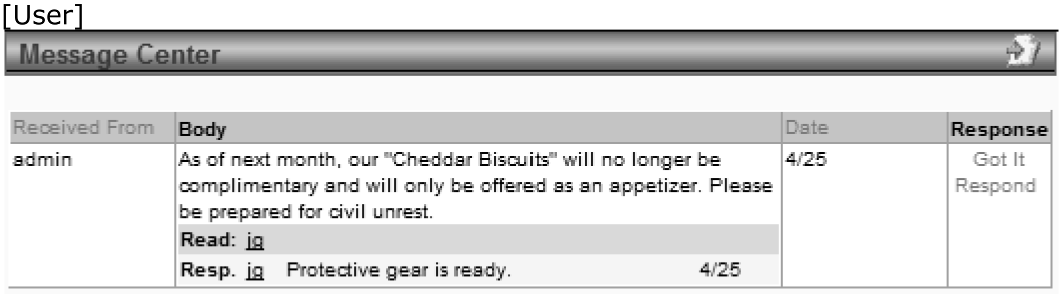
7. Users can now see and respond to the message.

Message Center

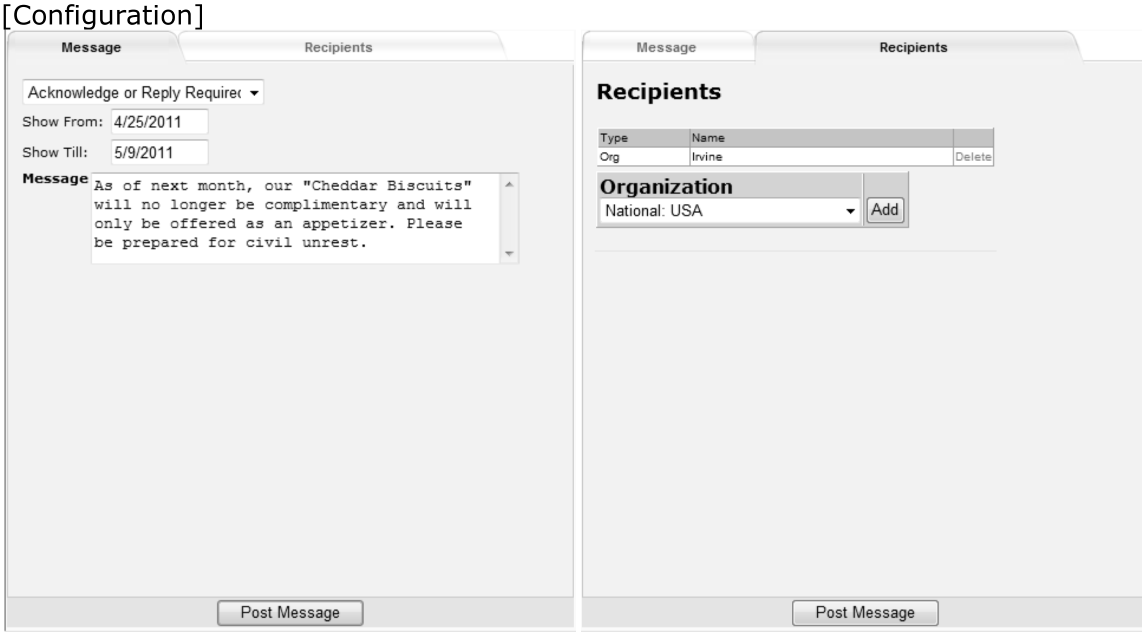
[Administrator]



[User]



[Configuration]



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:

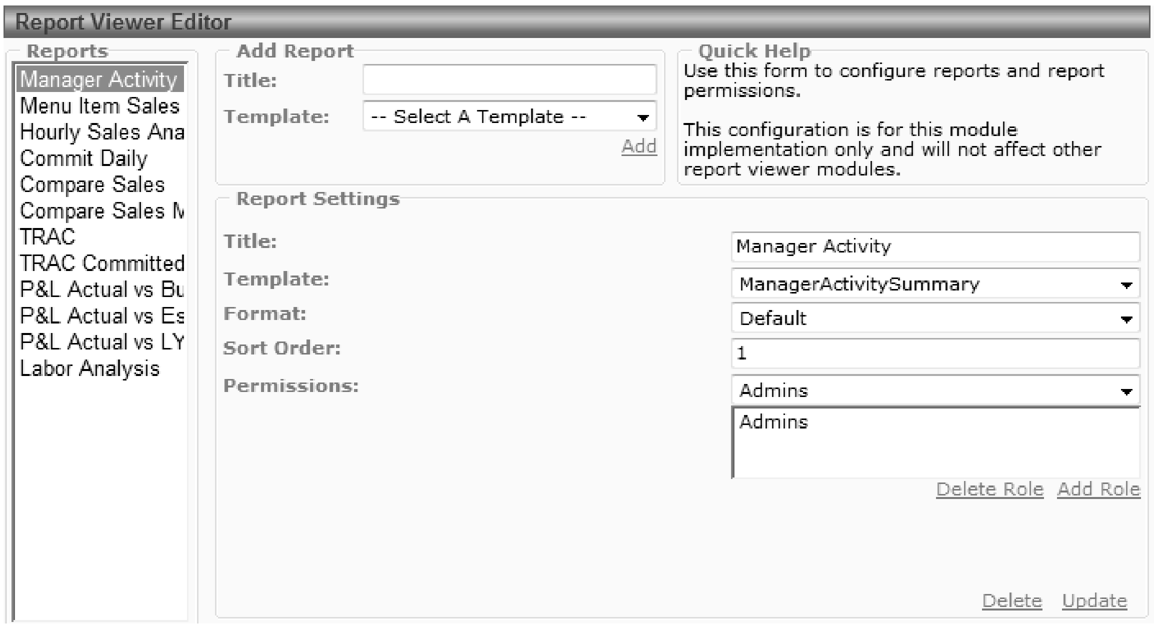
- Report Selection by Name:
  - Configured on the Admin screen
- For (Organization Selection):
  - National
  - Regional
  - District
  - Unit
- By (Date Type Selection):
  - Date Range
  - Day
  - Week Ending
  - Period
  - Quarter
  - Year
- Date Selection:
  - Options Vary by Date Type choice
- Run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



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:

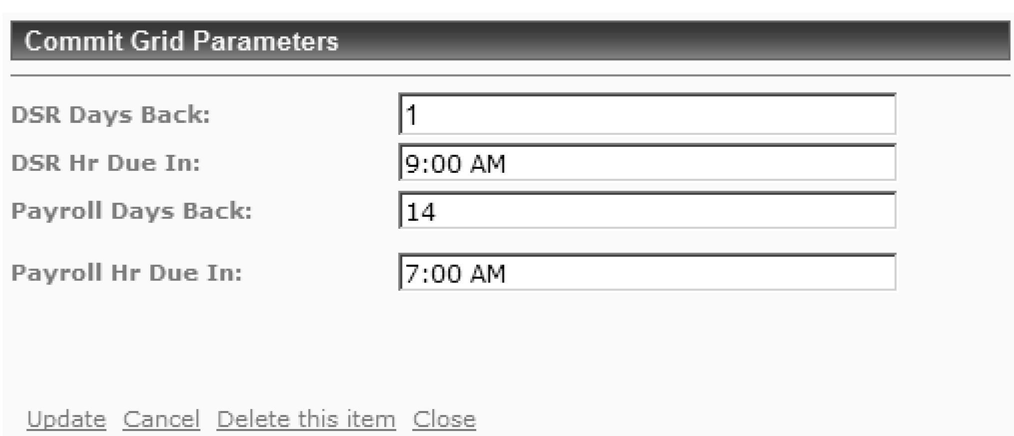
1. Log into the NorthStar Portal.

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.



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:

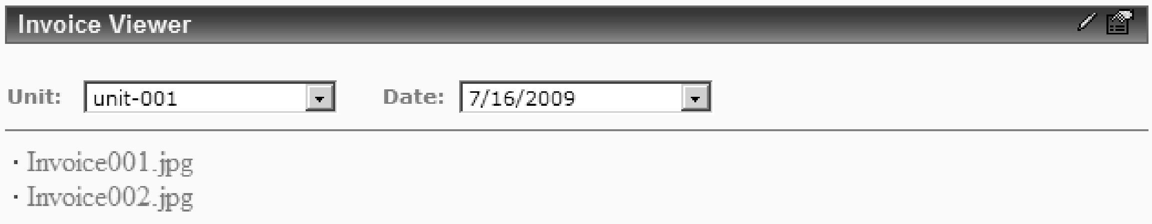
- Unit Selection
- Date Selection

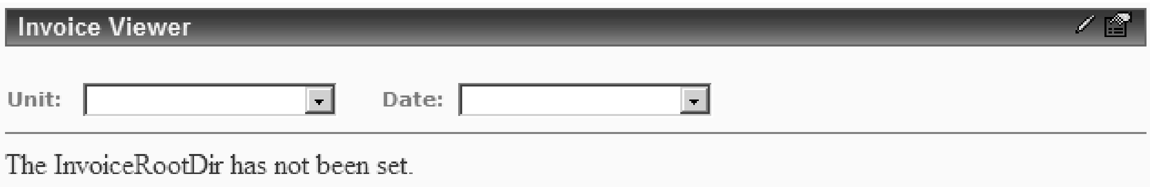
Configuration Instructions

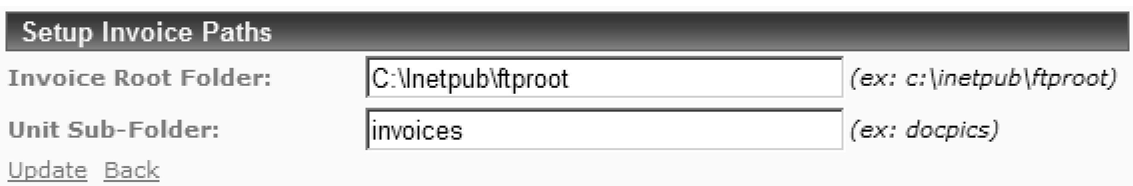
Follow these steps to configure this module:

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







Un-Commit

Module Type
Standard

Install Type
Default

Usage
Un-Commit

Sorting Options
N/A

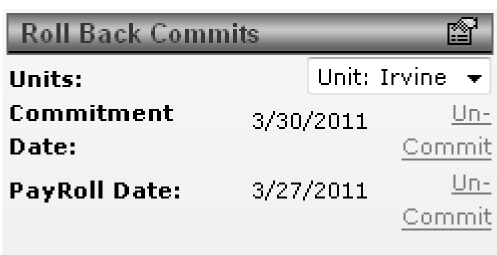
Business Process Dependency
Daily Commit

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.



RSS Feed

Module Type
Standard

Install Type
Default

Usage
RSS Links

Sorting Options
N/A

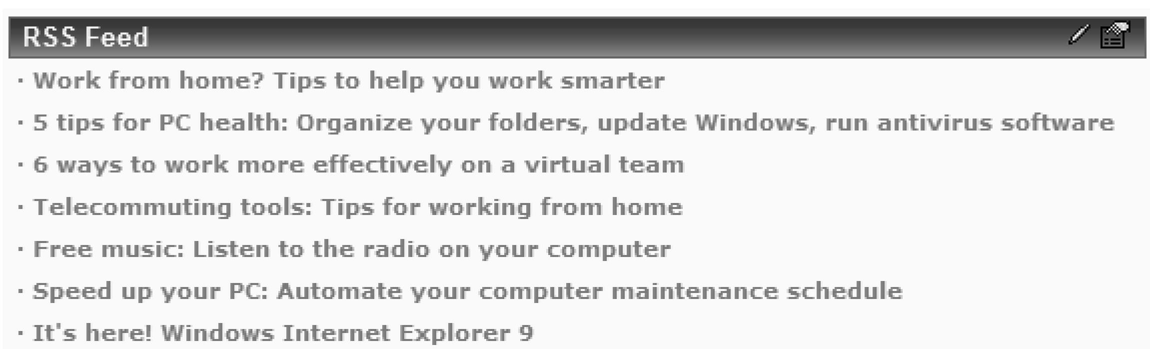
Business Process Dependency
N/A

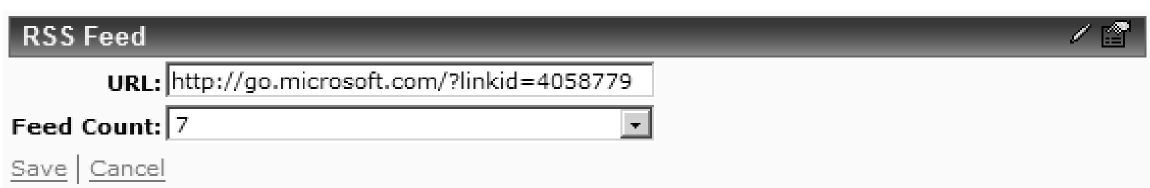
The RSS Feed Module displays RSS links. RSS (Really Simple Syndication) is used to publish frequently updated works—such as blog entries, news headlines, etc. This example is displaying a Microsoft RSS Feed; however, it is relatively simple to create your own.

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

Install Type
Default

Usage
Media

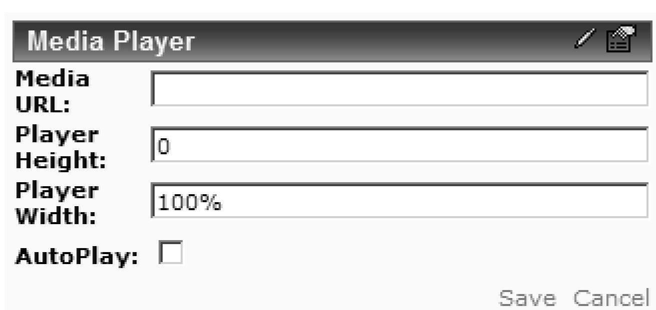
Sorting Options
N/A

Business Process Dependency
N/A

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

Configuration Instructions
Follow these steps to configure this module:

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.



Forum

Module Type
Standard

Install Type
Default

Usage
Discussion Board

Sorting Options
Forum Categories by Sort Order #

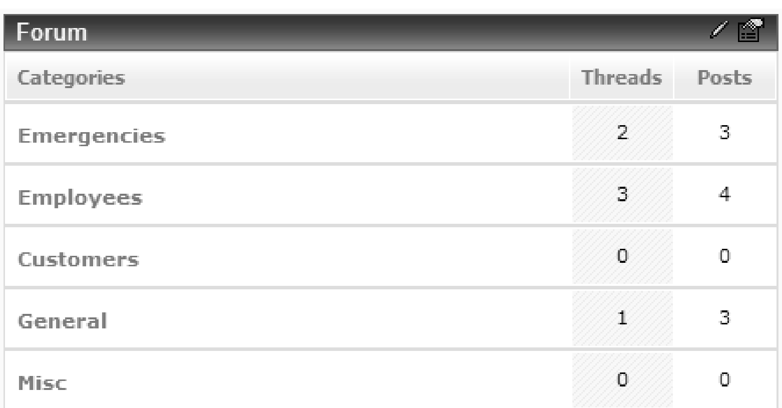
Business Process Dependency
N/A

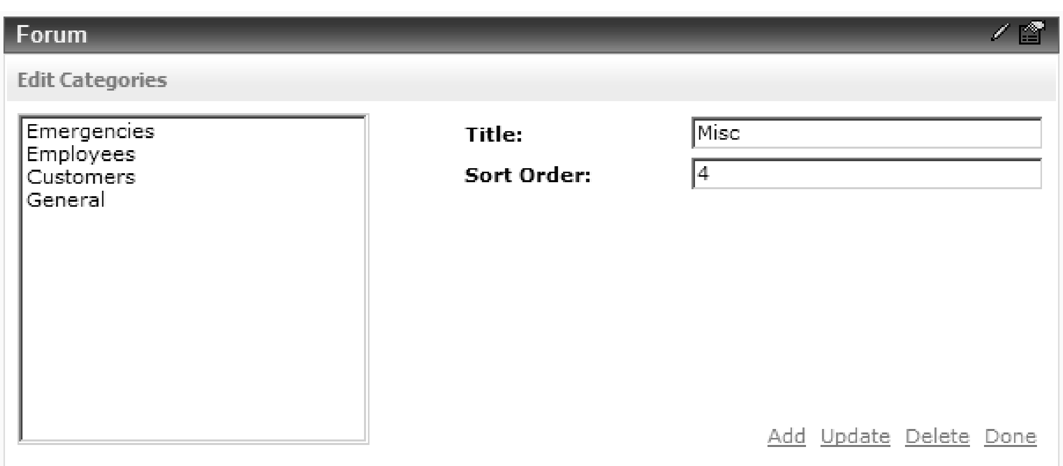
The Forum Module displays a set of discussion or message board threads, by a category or topic.

Configuration Instructions

Follow these steps to configure this module:

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.





Commit Override

Module Type
Standard

Install Type
Default

Usage
Code Generator

Sorting Options
N/A

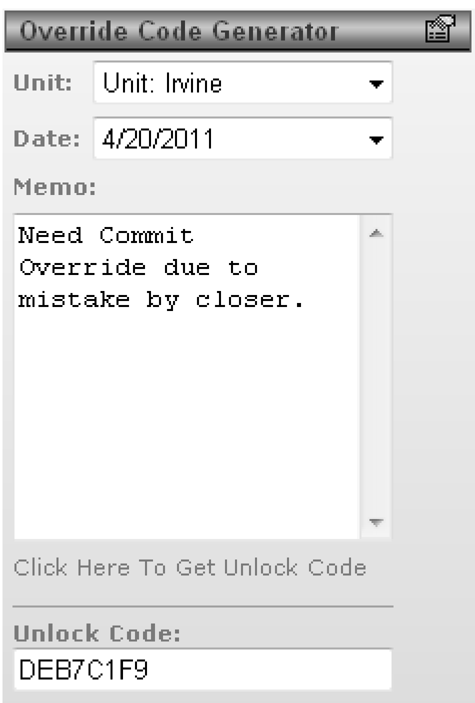
Business Process Dependency
N/A

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.



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 Type
Admin

Install Type
Default

Usage
EID Net Sales

Sorting Options
N/A

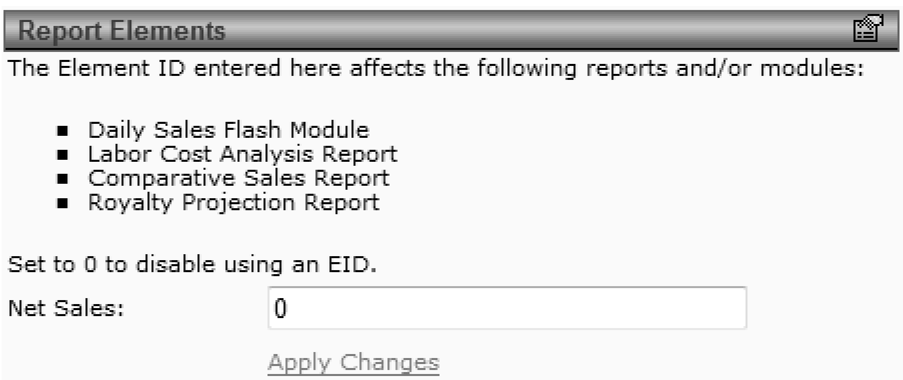
Business Process Dependency
N/A

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

Configuration Instructions

Follow these steps to configure this module:

1. Log into the NorthStar Portal.
2. Navigate to Report Elements or add it to the desired tab.
3. Enter the Net Sales EID Number.
4. Click Apply Changes when finished.



Module Types

Module Type
Admin

Install Type
Default

Usage
Module Management

Sorting Options
N/A

Business Process Dependency
N/A

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.

Configuration Instructions

Follow these steps to configure this module:

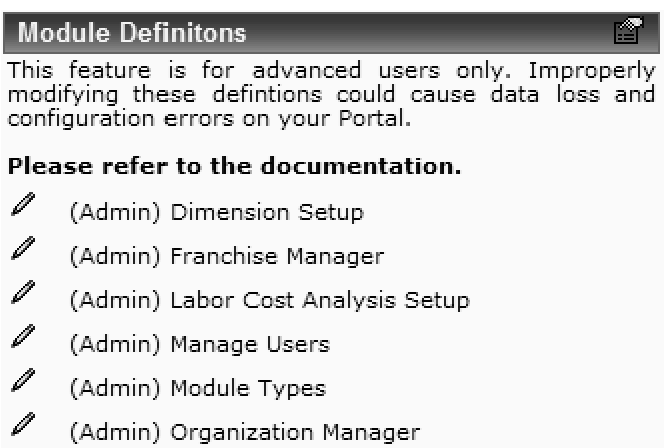
1. Log into the NorthStar Portal.

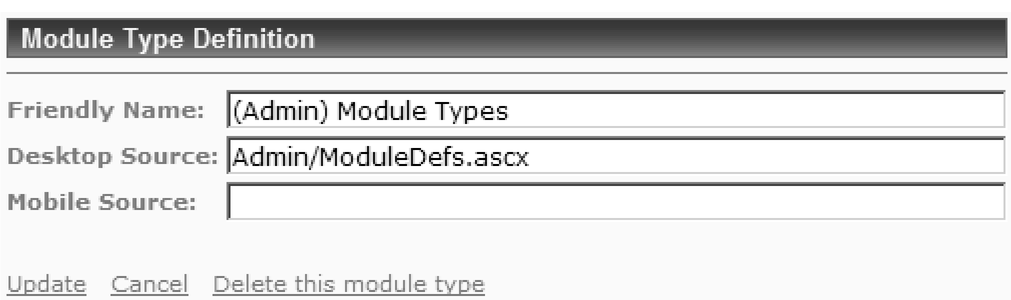
2. Navigate to Module Types or add it to the desired tab.

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.





Roles

Module Type
Admin

Install Type
Default

Usage
User Access Types

Sorting Options
N/A

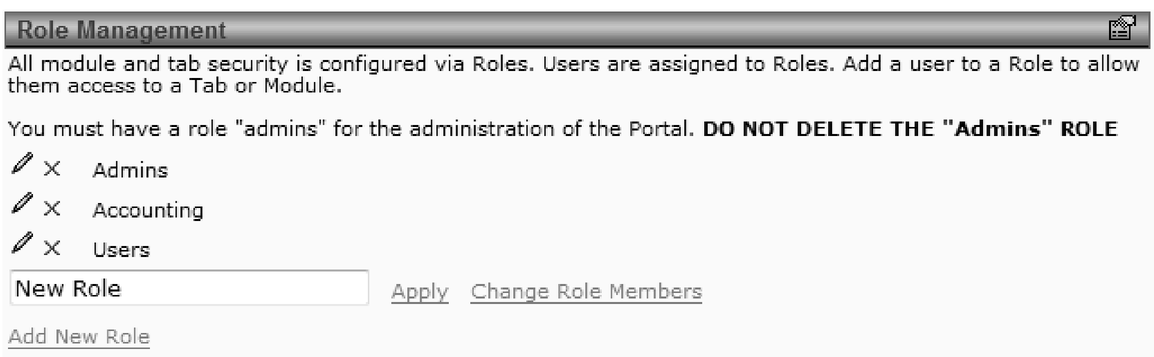
Business Process Dependency
N/A

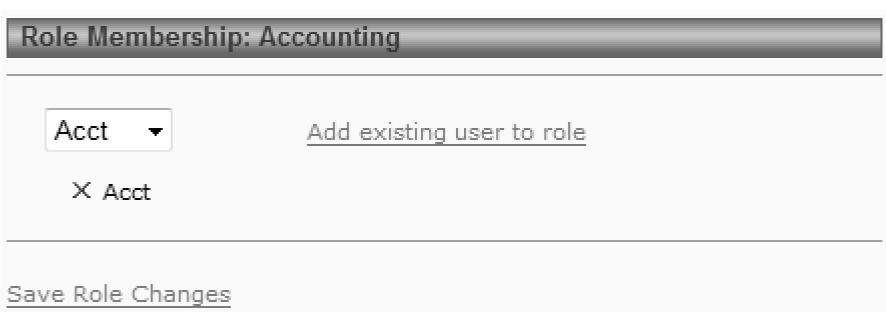
The Roles Module lets you create and manage the available roles that are assigned to Portal users.

Configuration Instructions

Follow these steps to configure this module:

1. Log into the NorthStar Portal.
2. Navigate to Roles or add it to the desired tab.
3. Click Add New Role to create a role.
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.





Site Settings

Module Type
Admin

Install Type
Default

Usage
General Options

Sorting Options
N/A

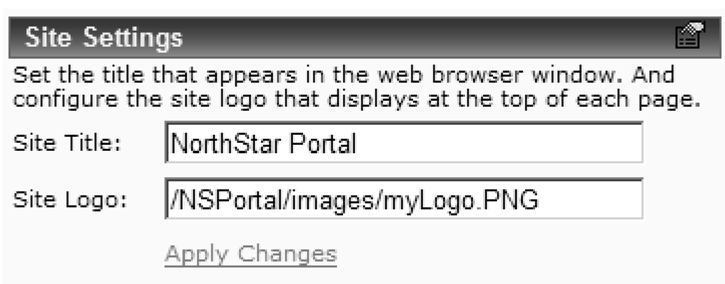
Business Process Dependency
N/A

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

Configuration Instructions

Follow these steps to configure this module:

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.



Manage Users

Module Type
Admin

Install Type
Default

Usage
User Administration

Sorting Options
N/A

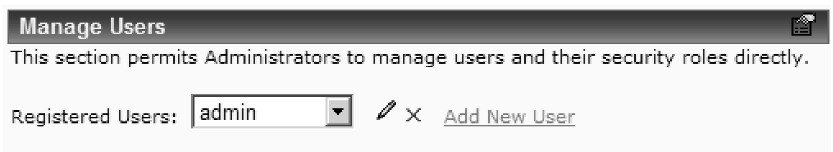
Business Process Dependency
N/A

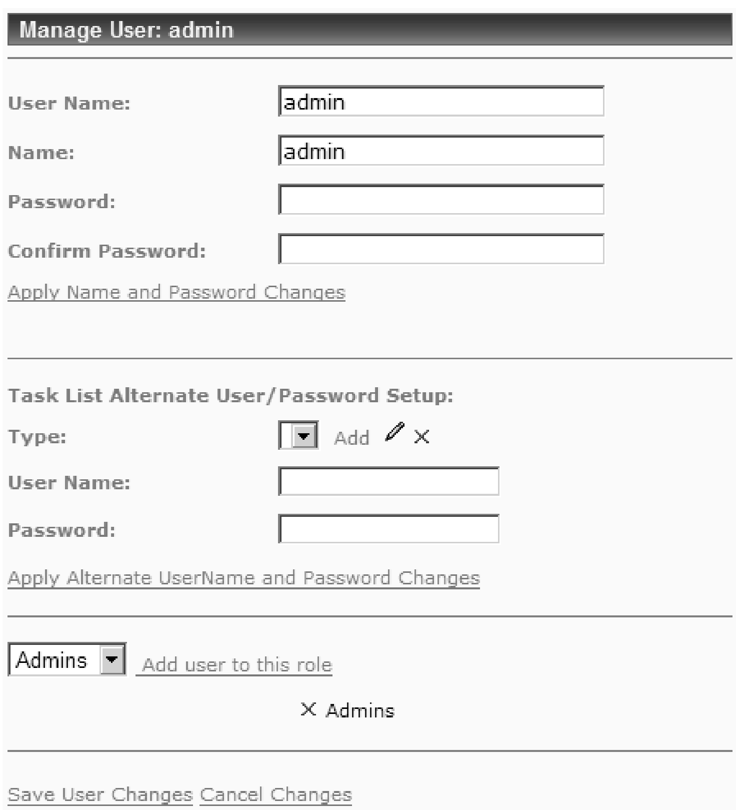
The Manage Users Module is where administrators can add and edit users and user options.

Configuration Instructions

Follow these steps to configure this module:

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.





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.

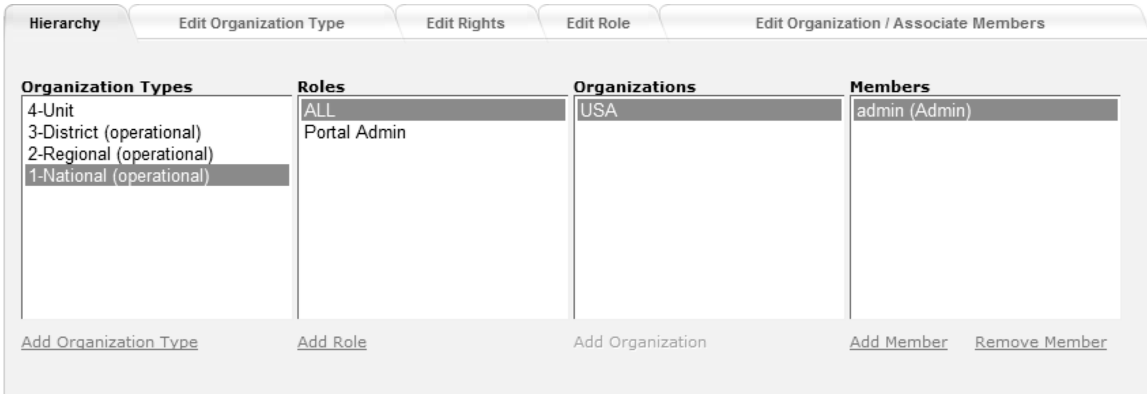
3. Select an Organization Type and a Role.

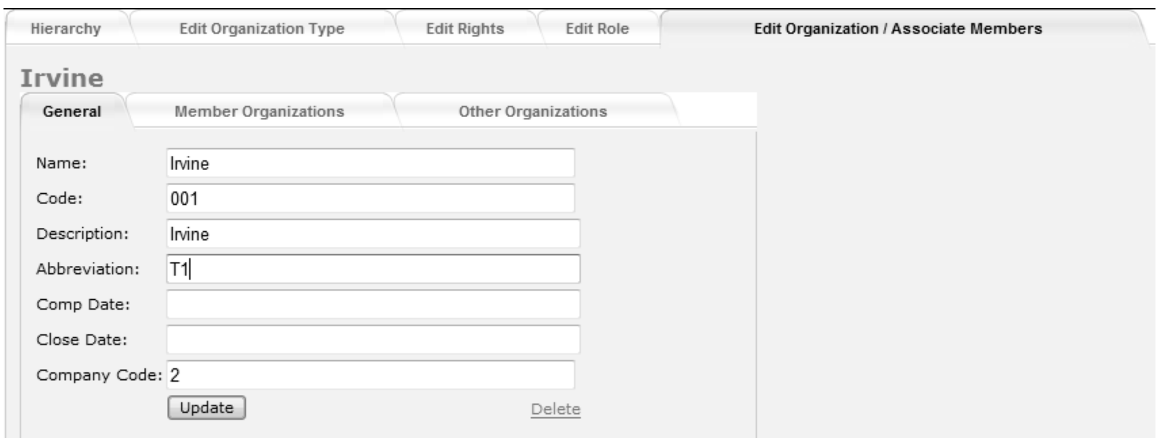
4. Click Add Organization to add an org to the selected org type.

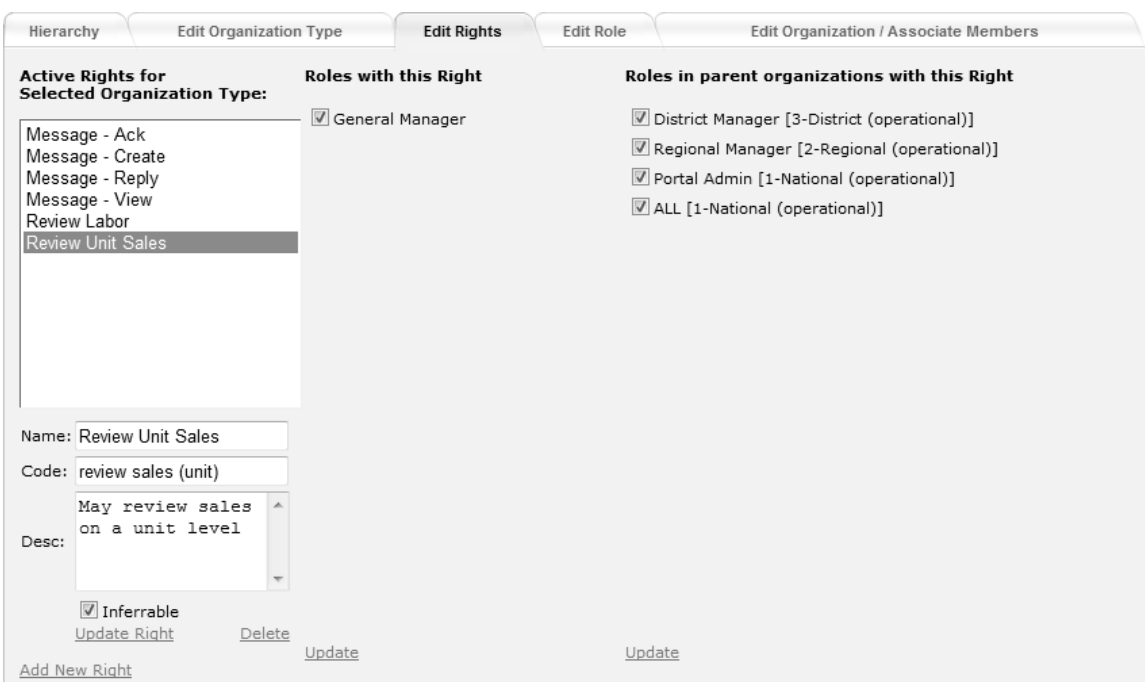
5. Click Add Member to assign users to an org type.

6. Advanced configuration may require professional assistance, training and/or documentation.

Organization Manager







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.

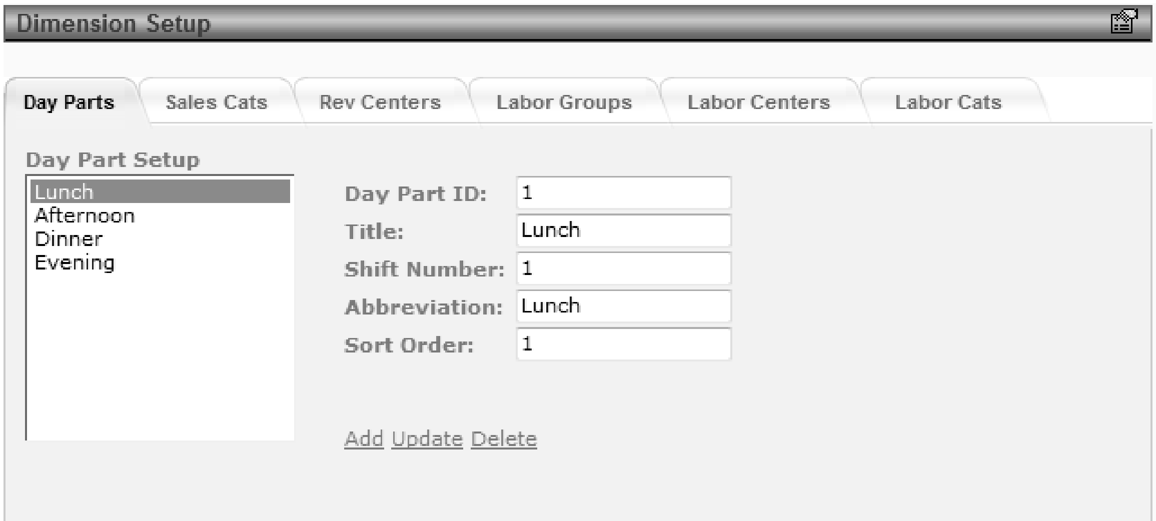
3. Select a Dimension tab to setup.

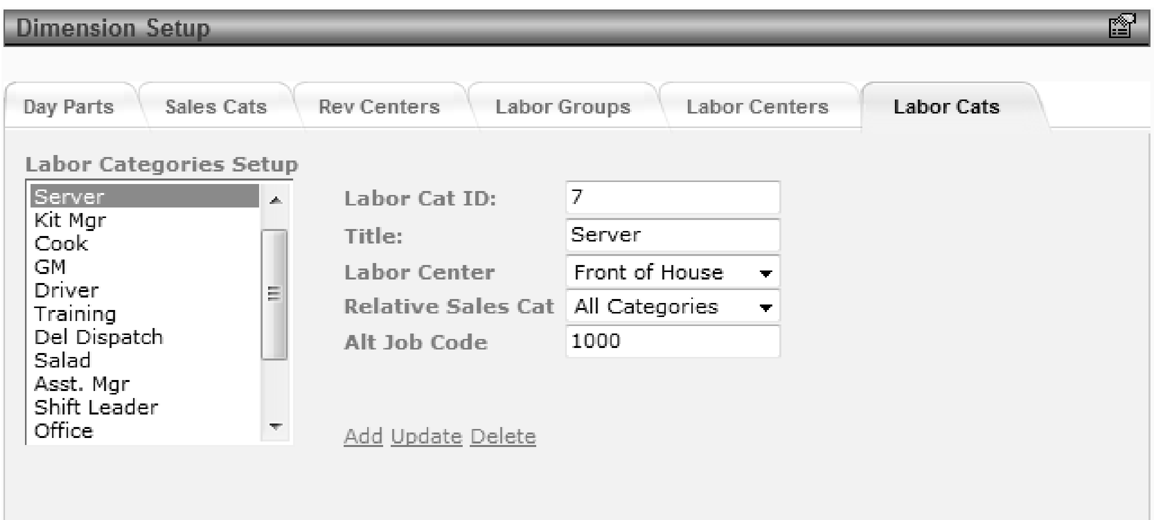
4. Enter values for the given dimension.

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





Franchise Manager

Module Type
Admin

Install Type
Default

Usage
Integration

Sorting Options
N/A

Business Process Dependency
N/A

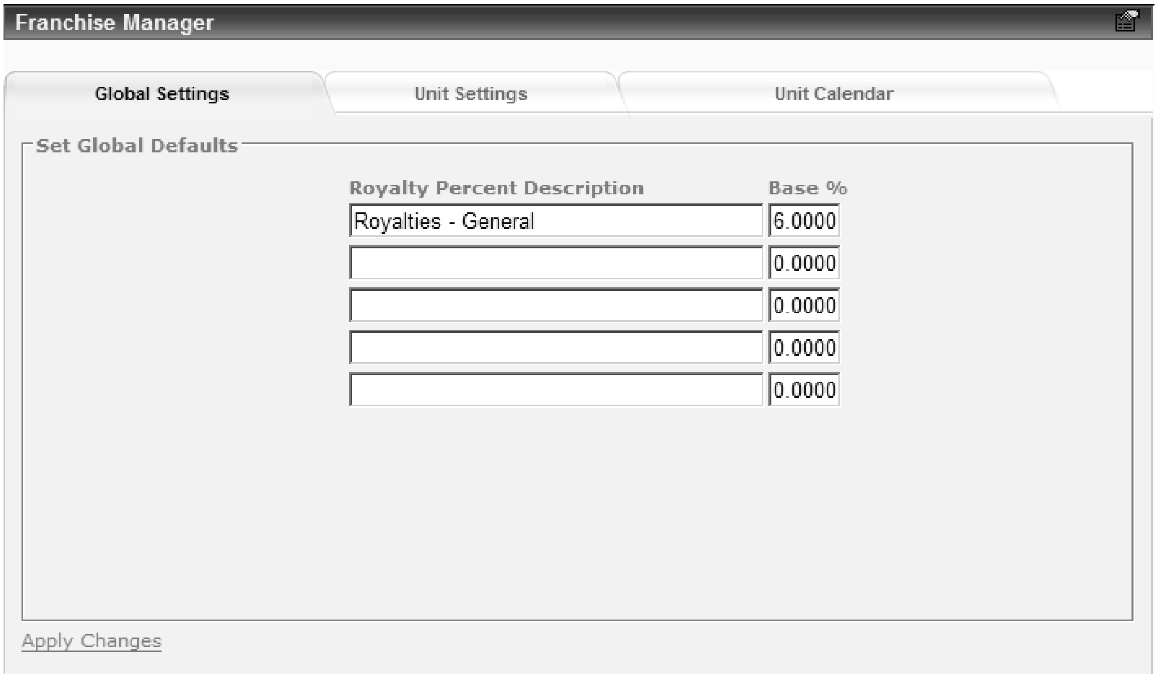
The Franchise Manager Module is an administrative utility that encapsulates all of the franchise management into a single module to setup and maintain the associated reports for franchises.

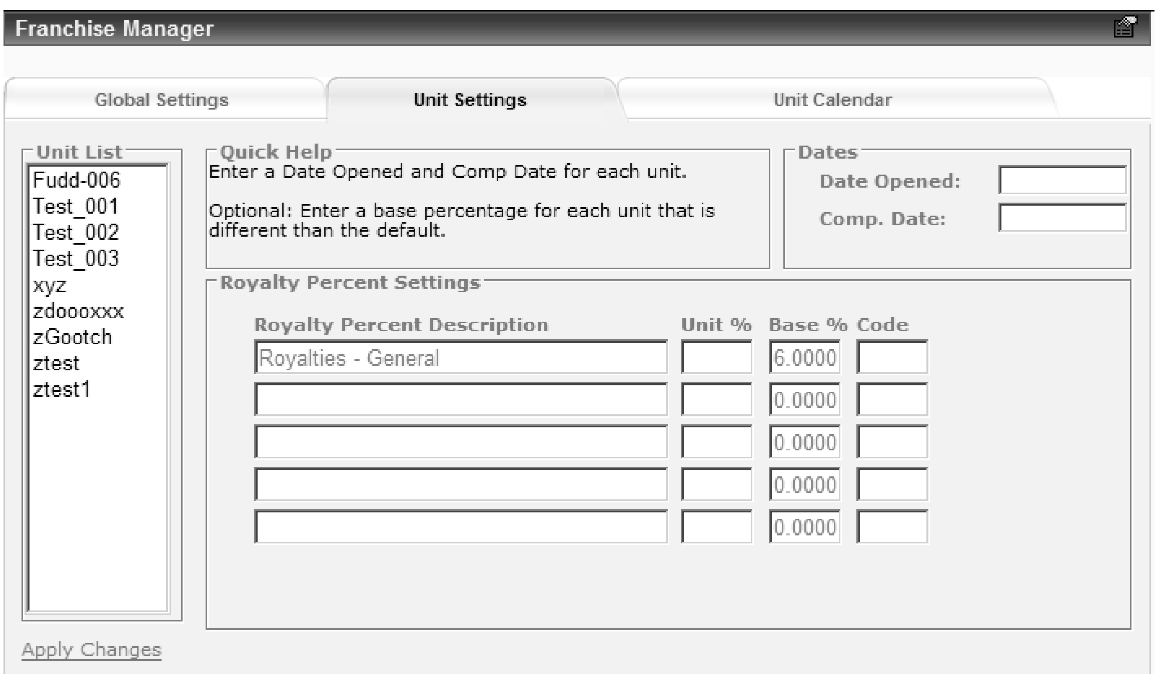
Configuration Instructions

Follow these steps to configure this module:

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.

Franchise Manager





Security Defaults

Module Type
Admin

Install Type
Default

Usage
Default Access Rights

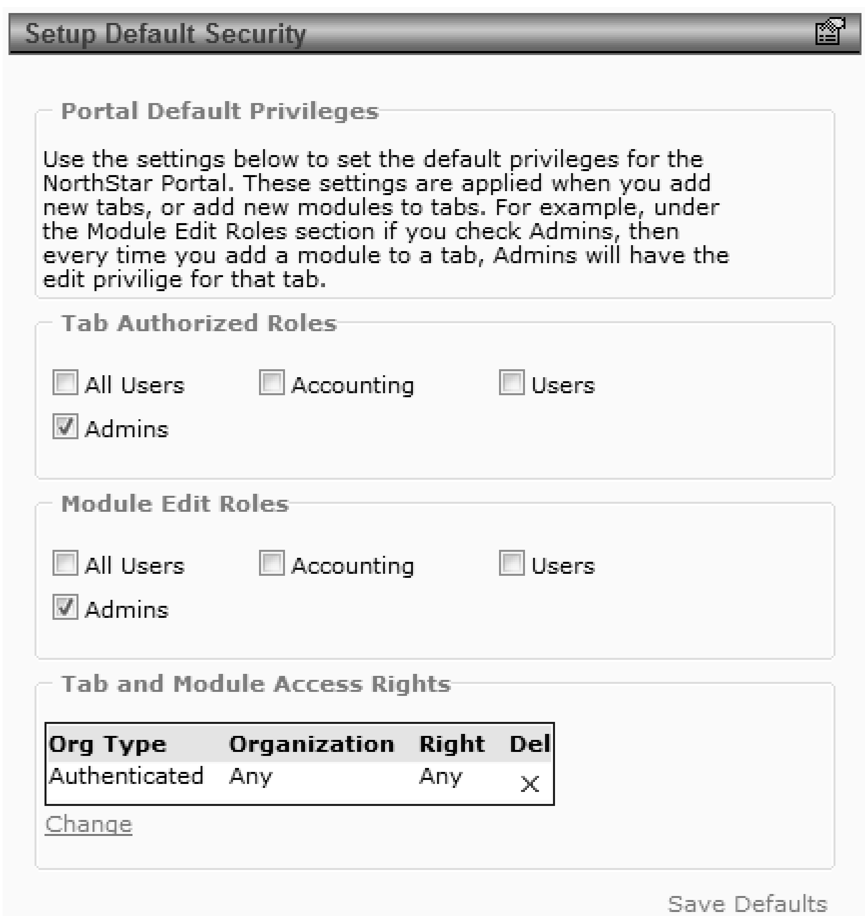
Sorting Options
N/A

Business Process Dependency
N/A

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

Configuration Instructions
Follow these steps to configure this module:

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.



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

Module Type
Advanced

Install Type
Default

Usage
Database Lookup

Sorting Options
N/A

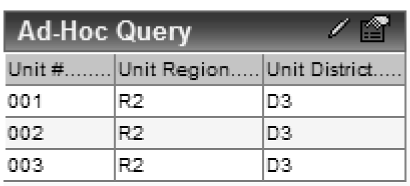
Business Process Dependency
N/A

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.

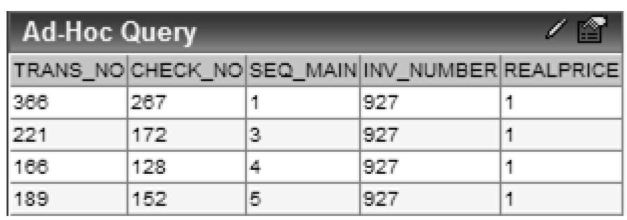
Configuration Instructions

Follow these steps to configure this module:

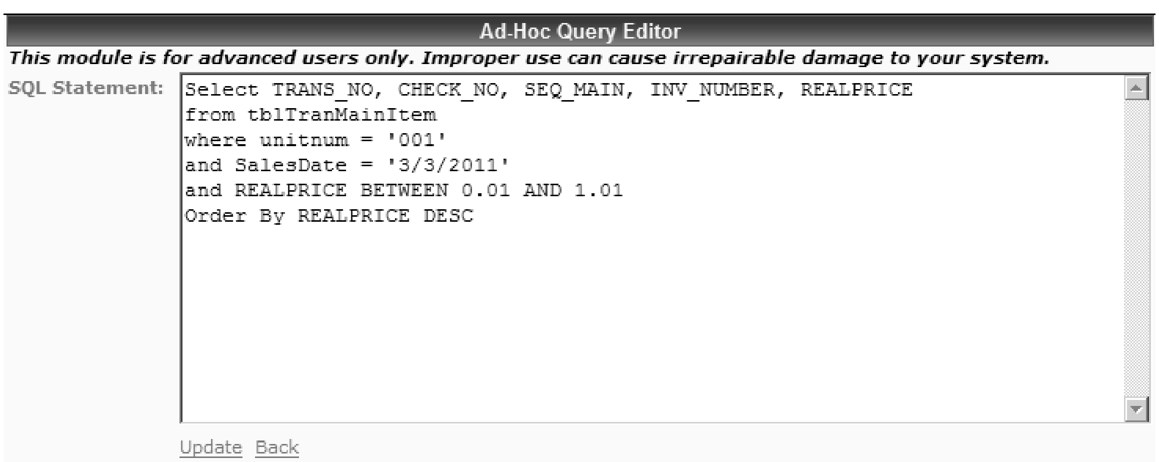
1. Log into the NorthStar Portal.
2. Navigate to Ad-Hoc Query or add it to the desired tab.
3. Click the pencil in the top-right corner of the module to change the SQL statement.
4. Enter a SQL statement, click Update when finished.
5. The query results are now displayed. To reset it back to default, 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



XML/XSL

Module Type
Advanced

Install Type
Default

Usage
XML Formatting

Sorting Options
N/A

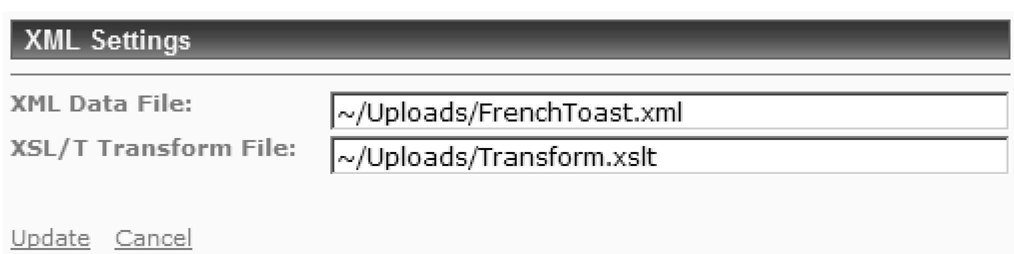
Business Process Dependency
N/A

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.

Configuration Instructions

Follow these steps to configure this module:

1. Log into the NorthStar Portal.
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.
4. Enter the URL location of the XML Data File and the XSL/T Transform File.
5. Click Update when finished.



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

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

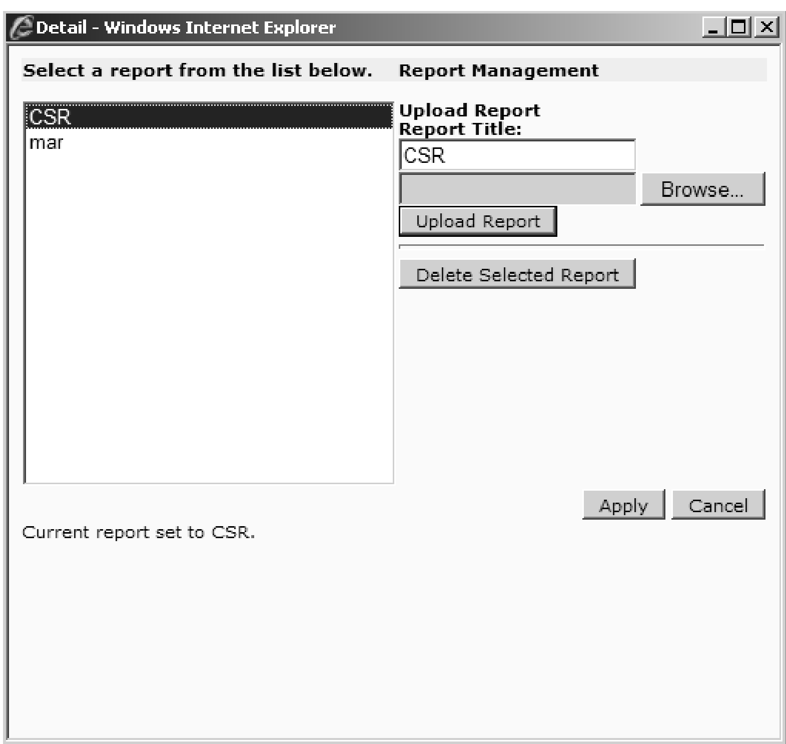
Available Reports
Check Search
Manager Activity
Payroll Punch Detail

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.

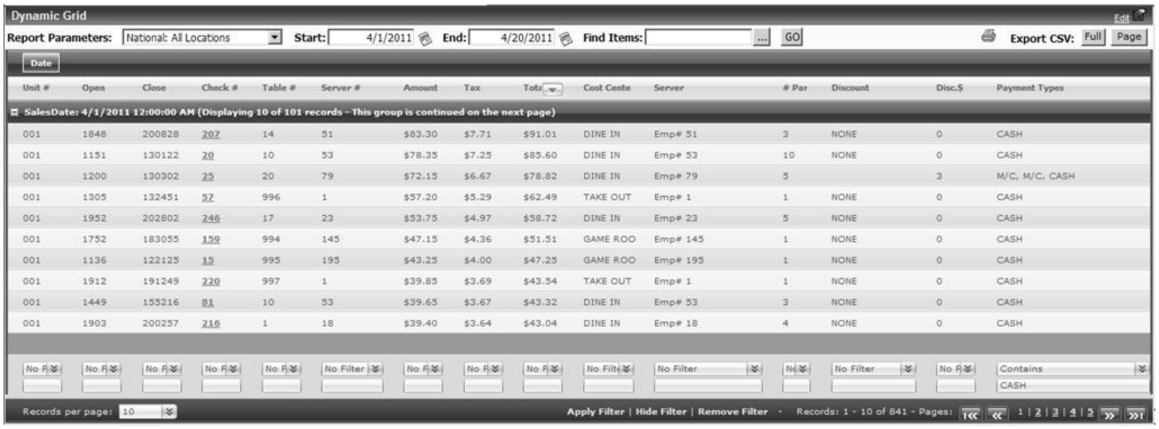
Configuration Instructions

Follow these steps to configure this module:

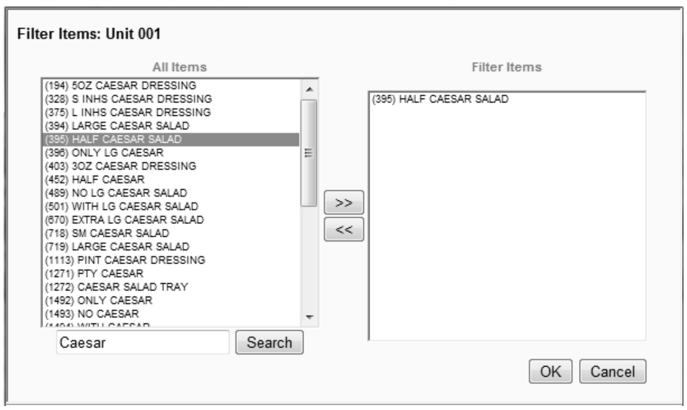
1. Log into the NorthStar Portal.
2. Navigate to Dynamic Grid or add it to the desired tab.
3. Click Edit in the top-right corner to add a report.
4. Enter a Title and Browse for the report (xml) file.
5. Click Upload Report, then select the report in the list and click Apply to select a report to run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



Dynamic Grid



Unit #	Open	Close	Check #	Table #	Server #	Amount	Tax	Tota	Cost Cente	Server	# Par	Discount	Disc.$	Payment Types
001	1848	200828	207	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	57	996	1	$57.20	$5.29	$62.49	TAKE OUT	Emp# 1	1	NONE	0	CASH
001	1952	202802	246	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	216	1	18	$39.40	$3.64	$43.04	DINE IN	Emp# 18	4	NONE	0	CASH



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

Tax Code	Amount
1	$1.73

Payment Type	Pay Memo	Amount	Tip	Change	Total
AMEX	565448,xxxxxxxxxxx1007,xx/xx, 20.43	$20.43	$3.00	$0.00	$23.43

Extended Commit Grid

Module Type
Optional

Install Type
Portal Config Module Installer

Usage
Commit Details

Sorting Options
ASC/DESC All Columns

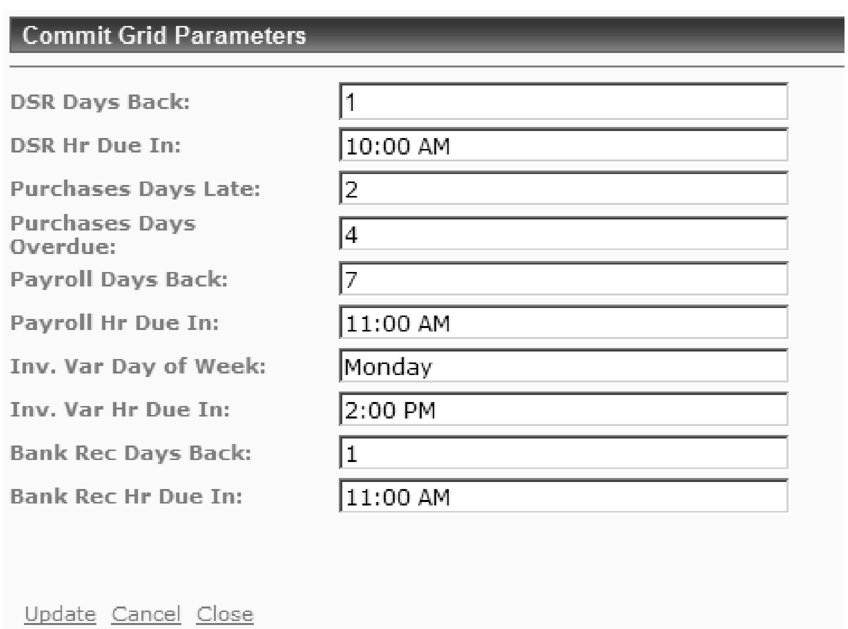
Business Process Dependency
Great Plains eConnect Daily, Inventory, AP, Bank Reconciliation & Payroll Commit

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.



Extended Commit Grid

Extended Commit Grid

Select Organization To View: National: National

Unit Num	Daily		Payroll		Inv. Var		AP		Bank Rec		Integration				
	BusDate	Commit	PeriodEnd	Commit	PeriodEnd	Commit	BusDate	Commit	BusDate	Commit	Daily POS	Daily LAB	Inv. Var	AP	Bank Rec
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					●	●	○	●	●
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					●	●	○	●	●
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					●	●	○	●	●
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					●	●	○	●	●
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					●	●	○	●	●
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					●	●	○	●	●
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					●	●	○	●	●
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					●	●	○	●	●
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					●	●	○	●	●
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					●	●	○	●	●
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					●	●	○	●	●
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					●	●	○	●	●
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					●	●	○	●	●
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					●	●	○	●	●
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					●	●	○	●	●
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					●	●	○	●	●
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					●	●	○	●	●

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.

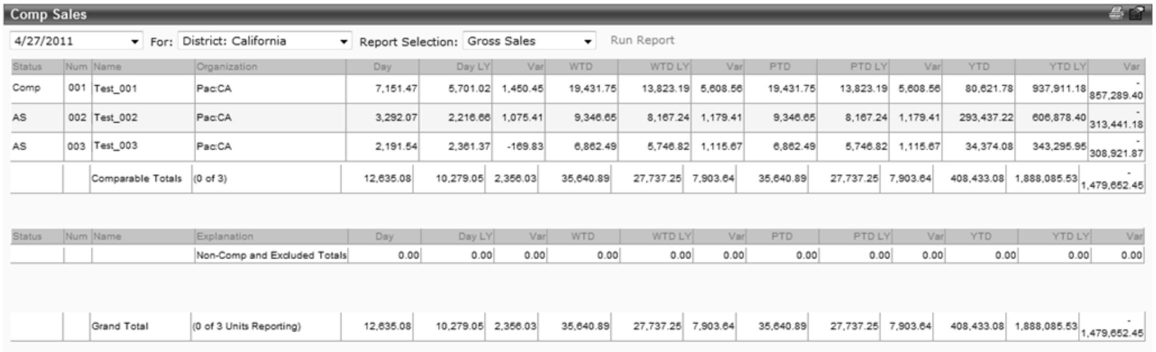
4. Click Add and wait for the aggregate to finish.

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

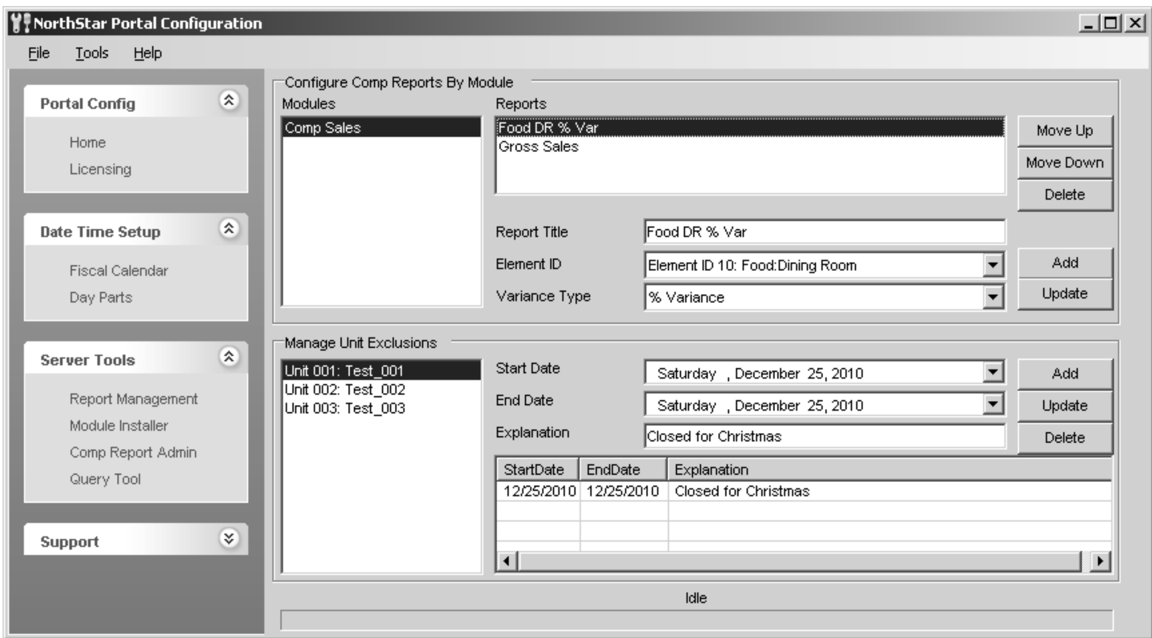


Comp Sales

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	Pac:CA	7,151.47	5,701.02	1,450.45	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	Pac:CA	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	606,878.40	-313,441.18
AS	003	Test_003	Pac:CA	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	-1,479,652.45

Status	Num	Name	Explanation	Day	Day LY	Var	WTD	WTD LY	Var	PTD	PTD LY	Var	YTD	YTD LY	Var
			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	-1,479,652.45



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:

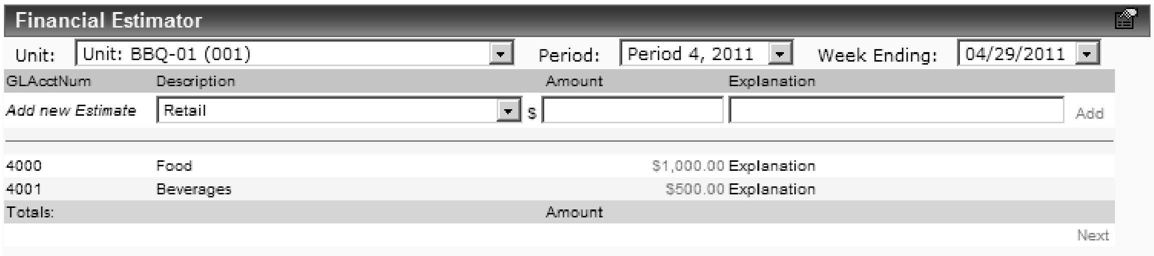
- GLAcctNum (GL Account Number)
- Description (GL Account Description)
- Amount (Estimate Amount)
- Explanation (Estimate Explained)

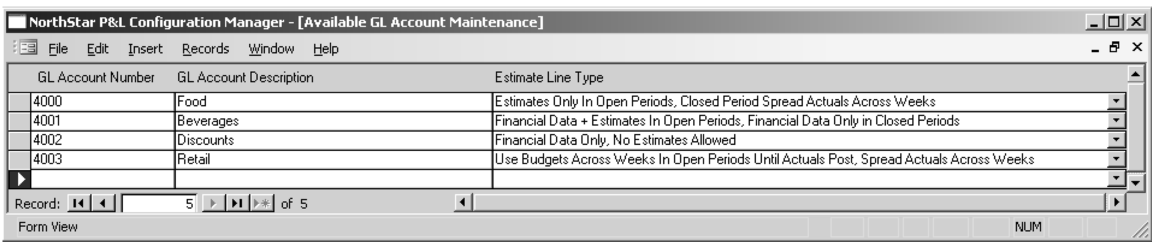
Configuration Instructions

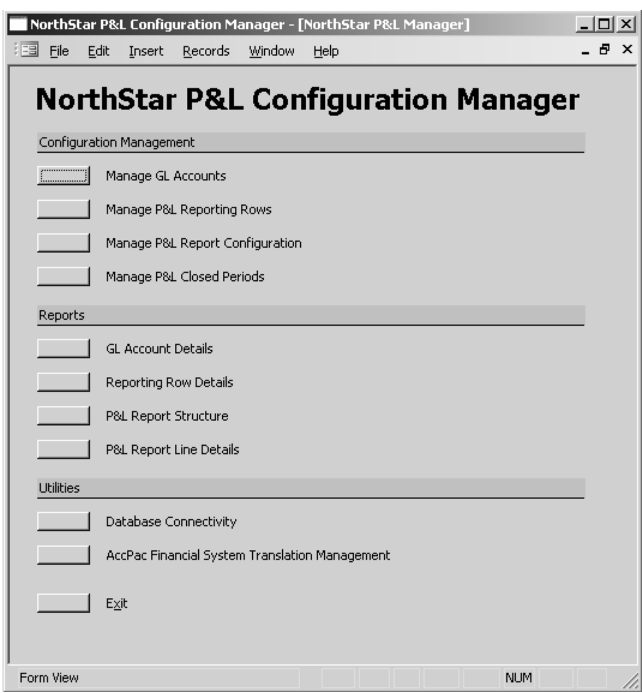
Follow these steps to configure this module:

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







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.

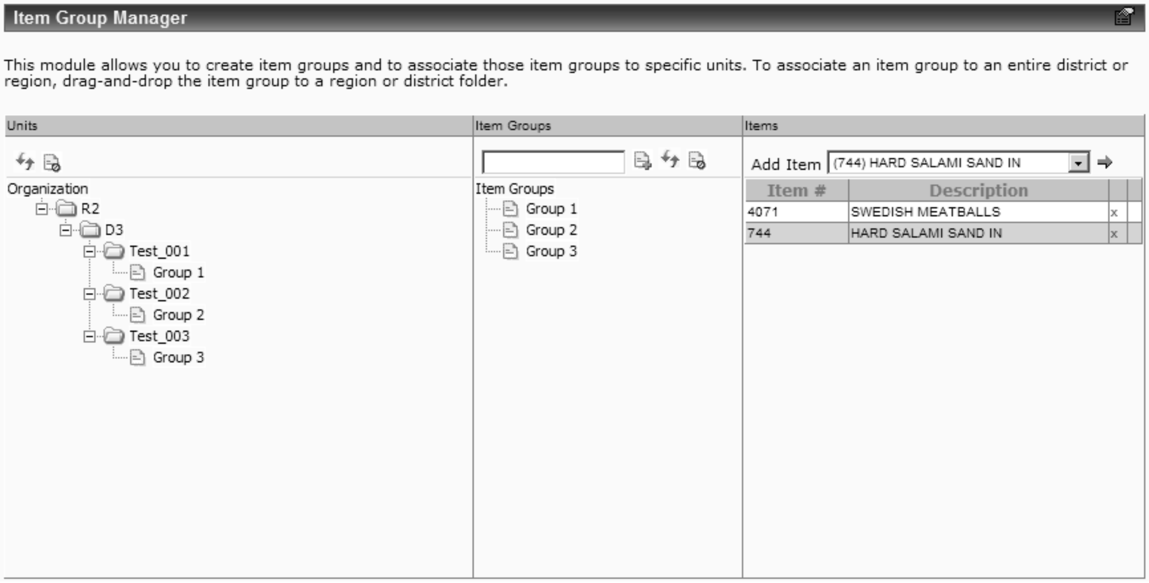
2. Navigate to Item Group Manager or add it to the desired tab.

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



Labor Cost Analysis Setup

Module Type
Optional

Install Type
Portal Config Module Installer

Usage
Labor Cost Analysis Report Config

Sorting Options
N/A

Business Process Dependency
Daily/Payroll Commit

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.

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

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