



Getting Started with Aloha Insight

Welcome to Aloha Insight! The system that offers you a user-friendly, intuitive, management tool that helps you control your business needs with minimal effort. You now have access to a feature-rich, enterprise-wide solution. This *Getting Started* guide provides you with useful information to help you get up and running with Aloha Insight and on your way to more effectively managing your stores.

An Overview of Aloha Insight

Aloha Insight is an Application Service Provider (ASP) that provides you with web-based tools to effectively manage multiple restaurants from a central location. Your data is sent from your stores' POS systems to your Aloha Insight web site either once daily or throughout the business day—your choice. This restaurant information is then presented to you in an extremely user-friendly format, via a web browser, allowing you ready access to current and historical sales, and cost of sales information. In addition to its full suite of powerful reports, the system can be intelligent by alerting users automatically to any number of changing management indicators, called "alerts."

How the System Works

The applications needed to generate and transfer POS data to the Aloha Insight website are installed on the back-office computer at each store defined in the Aloha Insight Site Setup application. These applications include:

- **Aloha FTP**—AlohaFTP is an application that defines the polling events (when and what data is sent to the Aloha Insight data center) as well as defines the action(s) that should take place before the polling events—such as what data to generate for polling. Prior to Aloha Insight being installed at the store, the Aloha Insight support team will work with your company's IT staff to define *how often* data should be sent from the POS to the Aloha Insight data center as well as *what data* should be sent. After the data reaches the data center it's available for viewing on your company's Aloha Insight web site. By default, all stores will send data at least once—after the end of day process has occurred on the back-office computer. Some companies perform "current day polling", which allows them to see store data for that particular day of business. For example, a store might send data at 1:00 pm, 5:30 pm, and again at 9:30 pm. In the event data is missing or perhaps corrupt, Aloha Insight is intelligent enough to automatically "re-poll" the data until it's correct.
- **GenPoll.exe** – Genpoll is an application that creates the files that are sent to the Aloha Insight data center. The files are created behind the scenes to the store personnel and take a matter of seconds to produce. During the current day polling process, AlohaFTP calls GenPoll and instructs GenPoll on what polling file(s) to create. During the EOD polling process, a batch file calls GenPoll, instructing it on what file(s) to create. Typical data includes sales history, cost of sales, check level detail, labor information, time and attendance information, etc.

Accessing your Aloha Insight Web Site

Before accessing your Aloha Insight web site, you will need to first obtain a log in, which is comprised of a user name and password. Each log in is unique within Aloha Insight, in that all users are assigned to a “security class”. Security classes identify what users can and cannot see as well as what they can and cannot do within the system. For example, you might set up a security class called “Managers” for your store managers. Within the “Managers” security class are rules that only allow them to access data for their particular store.

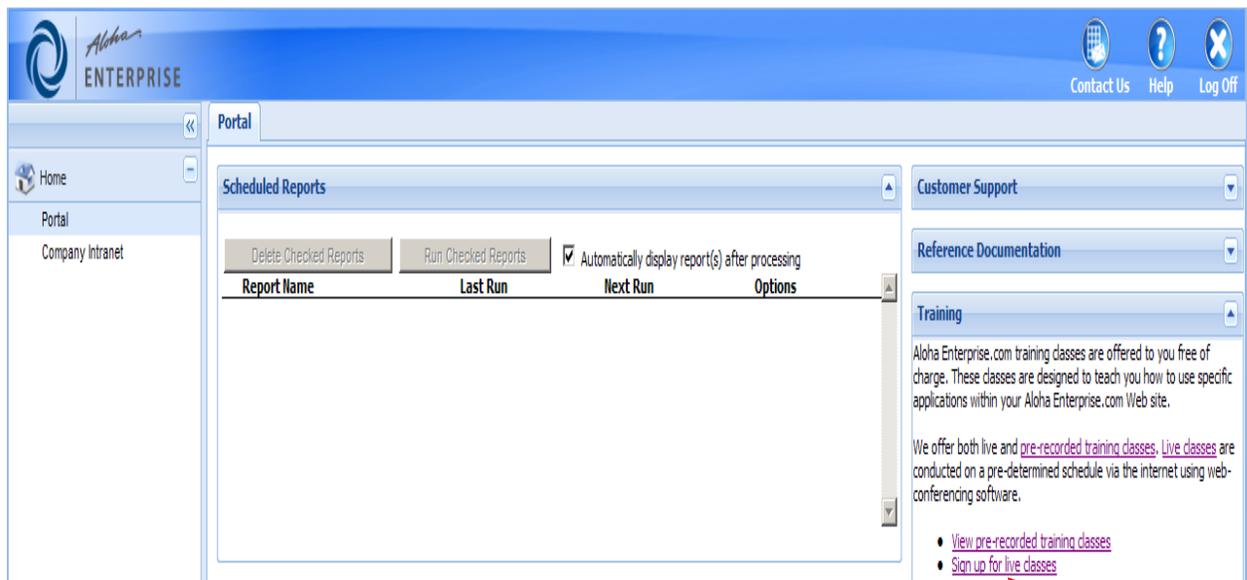
Using the Aloha Insight Applications

After you have successfully logged in to Aloha Insight, you should take the time to familiarize yourself with all the wonderful applications Aloha Insight has to offer you.

The first thing you should do is browse the pre-recorded training classes and register for the Aloha Insight online training sessions, which provide you with instructor-led training for the applications provided with the system. The initial class you should register for is *Aloha Insight Introduction*. If you are unsure of the other classes you should register for, please see the *Applications Overview* section on page 5 for a brief description of each application within Aloha Insight.

How to Register for Aloha Insight Online Training Classes

1. From your Aloha Insight Portal page, click the **Training** drop down window then select **Sign up for live classes** as illustrated in Figure 1.

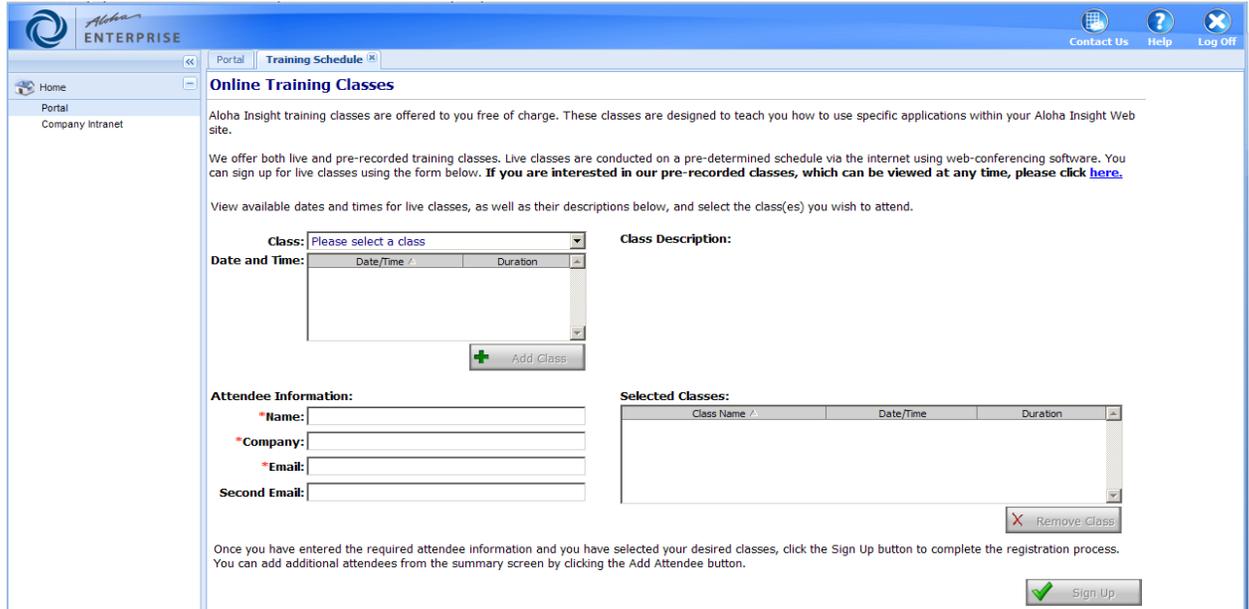


The screenshot shows the Aloha Enterprise web portal interface. The main content area is titled "Scheduled Reports" and contains a table with columns for "Report Name", "Last Run", "Next Run", and "Options". There are buttons for "Delete Checked Reports" and "Run Checked Reports", and a checkbox for "Automatically display report(s) after processing". On the right side, there is a "Customer Support" dropdown menu, a "Reference Documentation" dropdown menu, and a "Training" section. The "Training" section contains text about training classes and two links: "View pre-recorded training classes" and "Sign up for live classes". A red arrow points to the "Sign up for live classes" link.

Figure 1 – Online Registration

Click to register for
online training

- Upon selecting the class drop down window, you'll be provided with a listing of classes that are available for you to register. Simply choose the class you wish to enroll in, then select **Add Class**.



Online Training Classes

Aloha Insight training classes are offered to you free of charge. These classes are designed to teach you how to use specific applications within your Aloha Insight Web site.

We offer both live and pre-recorded training classes. Live classes are conducted on a pre-determined schedule via the internet using web-conferencing software. You can sign up for live classes using the form below. **If you are interested in our pre-recorded classes, which can be viewed at any time, please click [here](#).**

View available dates and times for live classes, as well as their descriptions below, and select the class(es) you wish to attend.

Class: Please select a class

Date and Time:

Date/Time	Duration

Class Description:

Attendee Information:

*Name:

*Company:

*Email:

Second Email:

Selected Classes:

Class Name	Date/Time	Duration

Once you have entered the required attendee information and you have selected your desired classes, click the Sign Up button to complete the registration process. You can add additional attendees from the summary screen by clicking the Add Attendee button.

Sign Up

Figure 2 –Training Sign Up Form

- Please be sure to enter your information in *all* of the text boxes and click **Sign Up**.
- After registering for a class, you will receive an e-mail that details the instructions for accessing the class.

Accessing Online Help

In addition to offering you instructor-led training, the system also provides Online Help for each of its applications. We urge you to take some time to go through the Online Help in an effort to familiarize yourself with the applications you will be using.

There are two ways to obtain help from within Aloha Insight. One way is from your Aloha Insight home page, and the other way is from within the application itself.

To Access Online Help

- Click the Help icon on the top right-hand portion of the page, as illustrated in Figure 3.



Figure 3 – Home Page Online Help Selection

Click to access
Online Help



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2. Upon clicking the Help icon, you are presented with a listing of links that invoke help information for each of the applications. Simply select the desired link to learn about the module.

3. In addition to application help, this section also provides you with documentation for the latest release notes, FAQs and customer driven guides.

To Access Online Help from within an Application

1. Each screen provides you with special “hints” that briefly describe how and why to use some of the key components on that screen.

2. When you see a question mark icon (Figure 4), simply click it to access Online Help pertaining to that specific screen.



Figure 4 – Screen-based Online Help

Click to access
 Online Help

Using Online Help

Each of the Help pages is designed to provide you with information about all of the screen elements for each screen as illustrated in figure 5. The left side of the Help page provides you with topic links that cover each screen for that particular application. Simply select the desired topic link to learn about that particular screen.

In addition to information pertaining to all screens, each application’s Help page provides you with a Getting Started section to help you gain a basic understanding concerning the intent of that application. You will also find a listing of frequently asked questions as well as a glossary of terms.

- Aloha Insight Online Help
- Aloha Insight Applications
 - About Alerts Setup
 - Getting Started with Alerts Setup
 - Working with Alerts Setup Wizard**
 - Alerts Setup FAQ
 - Alerts Glossary
 - About Alerts Viewer
 - About Configuring Audit Exceptions
 - About Check Detail Viewer
 - About Current Day Polling
 - About Custom Line Items
 - About Drilldown Viewer
 - About Dynamic Drilldown Viewer
 - About Manager Log Book Configuration
 - About Reports Builder
 - About Reports Viewer
 - Aloha Insight System Setup
 - Aloha Loyalty and Stored Value Online Help
 - Aloha Online Module Online Help

Working with Alerts Setup Wizard

The Welcome to The Alerts Setup wizard screen displays a list of alerts you own. You can sort the alerts by category, when the alert was last run, or the date the alert was last modified. The Created By column displays the original creator and is only visible when you select 'Show All Alerts.'

Alert Name — Identifies the alert.

Category — Displays the category for the line item used in the alert. You can not specify or change the alert category.

Active — Specifies whether you want Aloha Insight to check for the conditions of the alert. To deactivate an alert, clear the 'Active' check box. To view inactive alerts, select the 'Show Inactive Alerts.' You can make an inactive alert active by selecting the 'Active' check box.

Last Run — Displays the last time Aloha Insight checked for the alert condition. The Last Run time displays in date/time format, with an AM/PM notation. The date updates when Aloha Insight generates the alert based on the alert schedule or by running the alert using the 'Run Now' button.

Modified — Displays the last date the alert was modified.

Created By — Displays the original creator of the alert. This is visible only when you select 'Show All Alerts.'

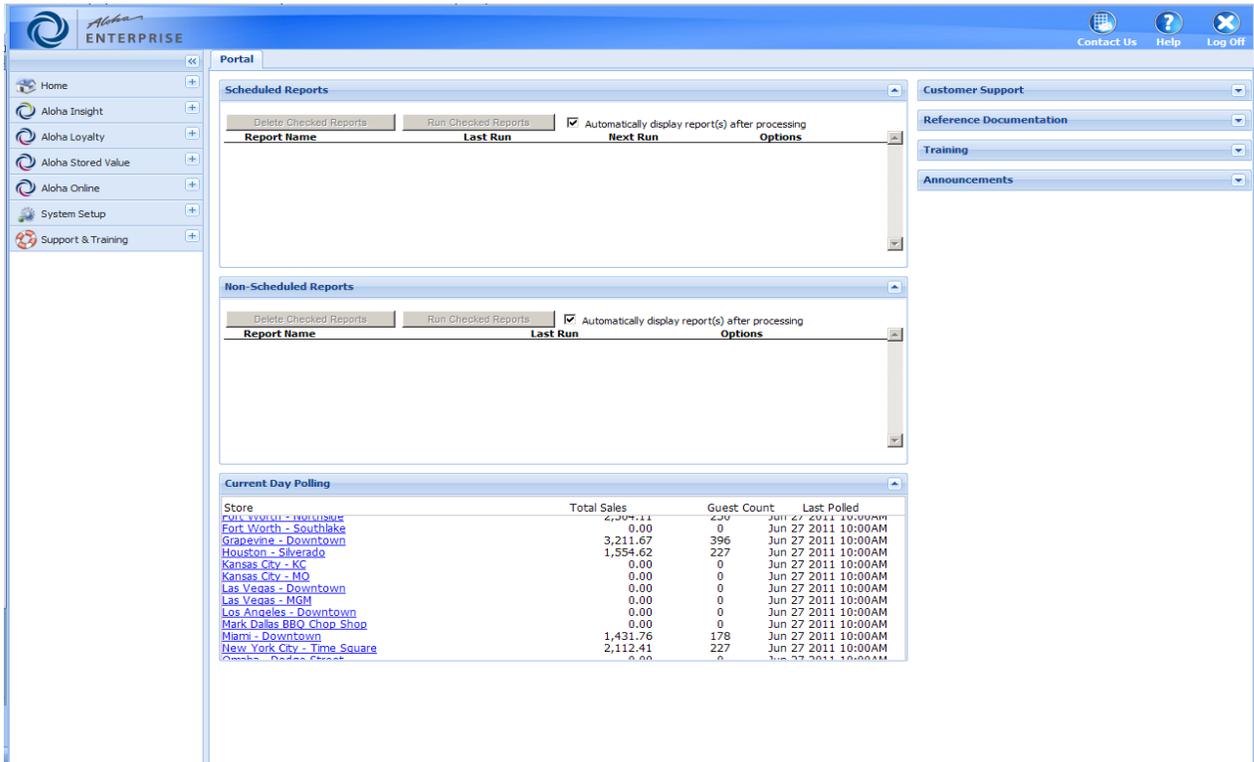
Toggle the alerts in the list by selecting one of the following options:

Show My Alerts — Lists the alerts created by you.

Figure 5 – Online Help

Applications Overview

The following introduces you to each of the applications that are available within Insight. If you are unable to see any of the following applications on your Aloha Insight home page, it signifies that the security class to which you are currently assigned does not grant access to that application.



The screenshot shows the Aloha Enterprise web application interface. The top navigation bar includes 'Home', 'Aloha Insight', 'Aloha Loyalty', 'Aloha Stored Value', 'Aloha Online', 'System Setup', and 'Support & Training'. The main content area is divided into several sections:

- Scheduled Reports:** Includes buttons for 'Delete Checked Reports', 'Run Checked Reports', and a checkbox for 'Automatically display report(s) after processing'. Below is a table with columns: Report Name, Last Run, Next Run, and Options.
- Non-Scheduled Reports:** Similar to the Scheduled Reports section, with buttons and a checkbox for automatic display.
- Current Day Polling:** A table showing sales and guest counts for various store locations.

Store	Total Sales	Guest Count	Last Polled
DALLAS - FORT WORTH - TRINITY BLVD	6,304,111	230	JUN 27 2011 10:00AM
Fort Worth - Southlake	0.00	0	Jun 27 2011 10:00AM
Grapevine - Downtown	3,211.67	396	Jun 27 2011 10:00AM
Houston - Silverado	1,554.62	227	Jun 27 2011 10:00AM
Kansas City - KC	0.00	0	Jun 27 2011 10:00AM
Kansas City - MO	0.00	0	Jun 27 2011 10:00AM
Las Vegas - Downtown	0.00	0	Jun 27 2011 10:00AM
Las Vegas - HIGH	0.00	0	Jun 27 2011 10:00AM
Los Angeles - Downtown	0.00	0	Jun 27 2011 10:00AM
Mark Dallas BBO Chop Shop	0.00	0	Jun 27 2011 10:00AM
Miami - Downtown	1,431.76	178	Jun 27 2011 10:00AM
New York City - Time Square	2,112.41	227	Jun 27 2011 10:00AM
Omaha - Dodge Street	0.00	0	Jun 27 2011 10:00AM





Aloha Insight

- **Alerts Setup** – Allows you to set up Alerts that provide proactive information to management when specific criteria are met in the system, such as employees approaching overtime, void counts, sales per hour, etc.
- **Alerts Viewer**- Alerts Viewer is a repository for Alerts that have been generated by the Aloha Insight system. Only alerts that are designated for delivery to the Alerts Viewer will appear in the Alerts Viewer.
- **Audit Exception Configuration**- Allows you to check for abnormal behavior that falls outside of a specified range.
- **Check Detail Viewer**- Enables you to view Point-of-Sale historical check level detail from your Aloha Insight Web site
- **Current Day Polling**- Displays current day net sales information for each store via a “ticker” application. The data that is displayed and updated after each polling event throughout the day.
- **Custom Line Items**- Allows you to create a custom line item (data element) based on existing system/custom line items and numbers in the form of mathematical equations. The custom line items can be used in Aloha Insight custom reports and alerts.
- **Drilldown Viewer** – An interactive, sales-analysis tool that uses a report format in which you can drill-in to specific pieces of data such as category sales, labor, deposits, etc. Where applicable, you can drill-down all the way down to see the details on a specific check.
- **Dynamic Drilldown Viewer**- The Dynamic Drilldown Viewer is the next generation of the Drilldown Viewer. The Dynamic Drilldown Viewer enables users to enjoy a greater interaction with the data on all levels by providing interactive data analysis. You now have more flexibility in selecting, filtering and sorting the information to view as well as the ability to define and customize personalized views of the data.
- **Manager Log Book**-Enables you to communicate with your management staff, your management staff to communicate with each other, and capture important information about your business.
- **Manager Log Book Configuration**- Allows you to define how the data appears on the Manager Log Book screen to fit your operational needs. You determine the following: the sections that appear, the statistics that appear, the tasks for your management staff, daily specials, and reminders you want a manager to see on a daily basis.
- **Projected Sales** – Allows you to generate sales projections for each day of the week, based on the weighted average defined through Company or Site Setup. You can view projected sales information for a store. This information is also used in many Aloha Insight reports.
- **Reports Builder**- Allows you to create custom reports by specifying the format, headings, and extracting data from your company’s data warehouse to be included in the report.
- **Reports Viewer**- Allows you to configure reports using parameters such as the store or stores to be included, report date range(s), report format, etc. In addition you can manually generate the report or schedule a report to automatically generate at a specified interval and be e-mailed to one or more users within your company’s Aloha Insight system.



- **POS Menu Management-** Allows you to make menu item edits and send the changes to one or more stores based on an effective date. Please note that this application is only intended for customers who utilize our Centralized Data Management (CDM) features.

System Setup *Note:* This group of applications is typically used by the resource(s) responsible for the administration of Aloha Insight for your company.

- **Company Setup** – Company Setup allows you to define company-wide information and how it relates to Aloha Insight. For example, you can define your Fiscal Periods, default reporting
- **Category Setup** – Allows you to define new Aloha Insight-specific sales and reporting categories. The categories defined here do not affect the POS categories. They are solely used for Aloha Insight reporting.
- **My Settings-** Allows users with access to manage their user account. Users will be able to set their login type, change their password for logging on to the Aloha Insight system, update their email address, and set various defaults.
- **Security Class Setup-** Allows you to define each user’s role within the system, ensuring that the system’s intent is not jeopardized, and more importantly can be used by all resources within your company.
- **Site Setup** – Site Setup allows you to add stores to the Aloha Insight system as well as define store-specific information.
- **Subscriber Group Setup-** Enables the security class of the subscriber to determine the report the subscriber receives and the stores included in the report.
- **User Account Setup-** Enables you to establish and edit the users that can access Aloha Insight. For example, you can activate or inactivate user accounts, establish account and password settings for users, assign security classes to users, assign home areas, regions, stores, and store groups to users and create email addresses for users.

Support & Training

- **Online Help-** Allows you to access all of the information pertaining to each application.
- **Training Schedule-** Allows you to sign up for both live and pre-recorded training classes, which are designed to teach you how to use specific applications within your Aloha Insight Web site.

What are Line Items?

As you learn Aloha Insight, you’ll often read and hear the term “line items”. Line items are an integral component within the Reports Builder, Custom Line Items, and Alerts Setup applications. They allow you to tap in to specific data elements within your data warehouse so that you can filter specific information. For example, if you wanted to know how many voids you had in your bar during your dinner day part, you would use the “Void Counts by Day Part by Revenue Center” line item.

What Else is Available?

In addition to Aloha Insight, we also provide the following services. For information on any of the following, please contact your Sales Representative.



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- **Data replication** – Aloha Insight can replicate data (via Standard SQL replication) from your company's data warehouse in the Aloha Enterprise data center to a SQL server database of your choice.
- **General Ledger/Payroll Integration** – Aloha Insight includes integration into some of the world's largest general ledger and payroll processing accounting systems such as ADP, QuickBooks, Great Plains, MAS 90, and many more! For more information on integrating Aloha Insight with your accounting system, please contact support.
- **Aloha Stored Value Gift Card** – A web-based, centrally hosted Gift Card system that allows your restaurants to sell and redeem gift cards.
- **Aloha HR Bridge** – An application that allows you to send newly hired employee information from either your HR system into your Aloha POS systems or from your Aloha POS systems into your HR system. Aloha HR Bridge also provides you with the ability to make employee changes (such as job code, pay rate changes) in the HR system and have the changes automatically sent to the POS systems.
- **Aloha Loyalty** – Aloha Loyalty is a Web-based loyalty application that allows your organization to quickly design, roll out and manage effective restaurant loyalty programs that will not only attract new customers, but also turn your existing customer base into "ideal customers" who have the purchasing habits that will drive topline growth for your restaurant.
- **Aloha Restaurant Guard**- Is the tightest loss prevention tool in the industry, providing you with the highest level of transaction intelligence allowing you will gain visibility into potential theft occurring at your restaurants along with the necessary support data to put a stop to it.
- **Aloha Online Ordering**- Aloha Online Ordering provides a secure and reliable solution to enable your customers to place online orders. The Aloha online ordering system integrates seamlessly with your website and your Aloha system.
- **Radiant Security Services**- Offers a layered defense solution to help restaurant and retail operators secure their networks, detect security risks and threats, and prevent security compromises with Site Shield, Secure Access and Threat Defender.
- **Aloha Command Center**- Is a dynamic support tool that enables unbeatable levels of service for your site systems. Aloha Command Center monitors the status of each server and terminal in real-time. Proactive alerts allow many issues to be resolved before they impact your operations.
- **Aloha Configuration Center**- Is a centralized database management application that manages Aloha Point-of-Sale configuration settings for multi-store restaurant organizations.

Contacting Aloha Insight support

To contact Aloha Insight regarding a support incident, an enhancement request, or with a general comment, simply click the **Contact Us** icon on the Aloha Insight home page.



Figure 6 – Contact Us

Click contact
Aloha Insight



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