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PrimeroEdge

PrimeroEdge – Menu Planning User Manual
Release 3.8

Cybersoft Technologies

4422 FM 1960 W Suite 400

Houston, TX 77068

www.primeroedge.com

http://facebook.com/primeroedge

http://twitter.com/primeroedge

PrimeroEdge Food Service Solutions
PrimeroEdge Menu Planning User Manual

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Software Version: 3.8

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1 Quick View of Menu Planning

This section provides:

- ✓ A brief overview of Menu Planning concepts
- ✓ Order of completion of configuring Menu Planning items
- ✓ Review and use of Menu Planning data sources

Configuration

The end goal of Menu Planning is to create Menu Calendars for use in the timely production of Menu Items. The first step is to complete the process of configuration. The [Menu Planning] module must have certain structures in place before the primary tasks of adding Ingredients, Recipes, Menus, etc., can be started. These structures are set up through functions on the **Configuration** menu.

Some functions can be completed at any time, while others must be set up before other functions can be completed. Your PrimeroEdge Implementation team may set up many of these structures for you.

A Set Up Data Sources and Meal Patterns

Data Sources and Meal Patterns are independent of each other, and therefore do not have a required sequence or order of set up.

Data Sources & Versions

Data Sources are collections of Ingredients and Recipes, such as the Child Nutrition (CN) data source, which are available for use by any district. These recipes and ingredients are ready for immediate use as is.

Custom Data Sources are added with help from PrimeroEdge Support. See page 190 for information on Data Sources and Versions.

Meal Pattern

Five (5) **Meal Patterns** are automatically included when PrimeroEdge [Menu Planning] is initially installed. A Meal Pattern includes the USDA standards set for Nutrients and Food Components required for Lunch and Breakfast Meal Services for groups of patrons (Serving Groups) such as K-5 or 9-12 grades. These Meal Patterns are ready for immediate use as is.

Custom Meal Patterns are added with help from PrimeroEdge Support. Refer to page 185 for details on Meal Patterns.

B Set Up Supporting Menu Details

These five configuration details are independent of each other, and therefore do not have a required sequence or order of set up. However, they must be set up before creating Recipes, and creating or assigning Menus.

HACCP Configuration

Three (s) **Hazard Analysis** processes and seven (7) **Critical Control Points** are automatically provided by PrimeroEdge [Menu Planning]. Custom processes can be set up, if needed. HACCP processes are selected when creating a Recipe. Refer to page 174 for details on HACCP processes.

Holiday Schedule

The **Holiday Schedule** is a calendar where holidays, In-Service days, and other special days are designated on which Meal Service is not provided. Menus should not be assigned to a Menu Calendar.

The Holiday Schedule must be set up before assigning Menus to a Menu Calendar so that the menu planner can indicate if / when Menus are to be assigned to scheduled holidays. See page 181 for the steps to add holidays to the Holiday Schedule.

Menu Item Categories

Menu Item Categories help to organize Menu Items. Menu Item Categories are selected when building Menus along with the number of choices allowed from each category. See page 145 for information on Menu Item Categories.

Site Groups

Site Groups group schools or sites that serve the same menus. Menus can be assigned to a Site Group rather than individual schools, thus saving time for the Menu Planner.

Site Groups are used to create a Menu or Menu Cycle, to assign Menus to a Menu Calendar, and to generate reports for groups of sites. See page 161 for site group creation details.

Menu Lines

Menu Lines support offering separate food “themes”, such as Sandwiches, Pizza, Salads, etc., where Menus are built around a particular theme. Menu Lines are used to narrow menu choices when assigning menus. Menu Lines are also specified when configuring a site. See page 158 for details on Menu Lines.

C Configure Sites

Configuring sites is completed after Meal Types (Meal Patterns), Site Groups, and Menu Lines are set up. See page 170 for details on configuring sites.

Site Configuration

Site Configuration must be completed for each site providing meal services. Configuring a site includes identifying all Meal Types (set up in Meal Patterns) and Menu Lines offered at the site, the Site Group to which the site belongs, and the date that meal services start (Effective Start Date).

D Select Standard Menu Items

Standard Menu Items are selected from available Menu Items. Menu Items are created from Recipes. Therefore setting up Standard Menu Items is completed after Recipes and then Menu Items have been created. Refer to page40 for the steps to create a Menu Item from a Recipe.

Standard Menu Items

Standard Menu Items is a set of Menu Items that are included on all or most Menus. Standard Menu Items are added to a Menu by either a) clicking the **Standard Menu Items** button on the **Menu Info** page or b) automatically by enabling the **Menus – Include Standard Menu Items by Default** system setting. See page 155 for details on creating Standard Menu Items.

E Create Menu Templates

Menu Templates reduce the effort and time required to create individual Menus.

Menu Templates

Items common to all or most menus, such as Meal Pattern and Menu Item Categories are selected for a Menu Template. The template is then used as the basis to add a new Menu which eliminates repetitive Menu creation configuration tasks.

Before this configuration task can be completed, Meal Pattern(s) (which define Meal Types and Serving Groups) , Menu Items, Menu Item Categories, Standard Menu Items, and Site Groups must be set up. See page 148 for the steps to create Menu Templates.

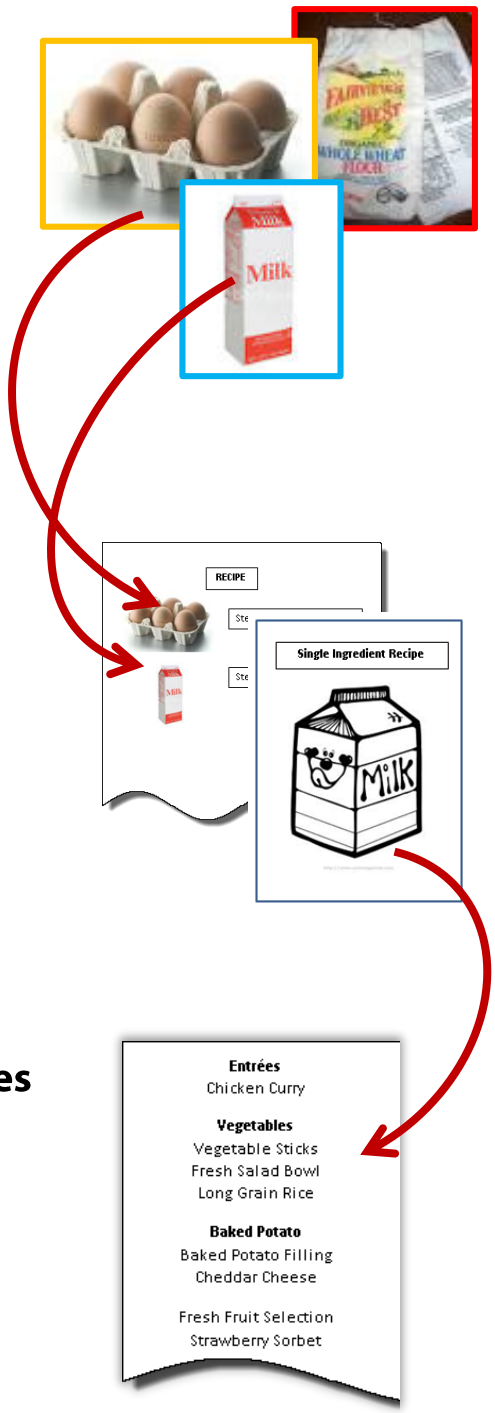
Ingredients, Recipes & Menu Items

After configuration tasks are complete, the second step is to add Ingredients and then build Recipes with the Ingredients.

A Add Ingredients

All Ingredients to be used in the production of Recipes are added. Ingredients can be "raw" products, such as milk, eggs, flour, etc., or a purchased product that is either used as purchased (half pint milk carton) or combined with other purchased products (hamburger buns and meat patties).

Nutrients and allergens are recorded for each Ingredient. Images of nutrition labels or other supporting documentation are uploaded.



B Build Recipes with Ingredients

Recipes are built from a Single Ingredient, such as a half pint of milk, or by selecting Ingredients and entering instruction steps.

C Create Menu Items from Recipes

Menu Items are created with a Recipe by choosing a Menu Item Category and setting food component contributions.

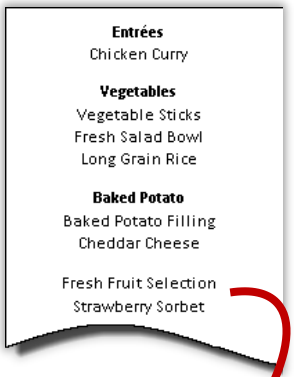
Menus & Menu Cycles

After Ingredients and Recipes are added and Menu Items are created from Recipes, adding and working with Menus is the next step.

A Add Menus

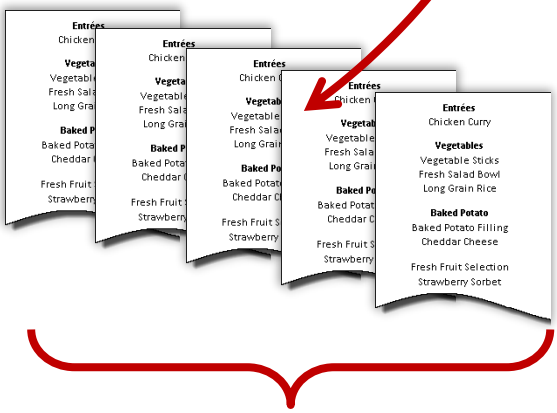
A menu is added by selecting a Meal Pattern, a Meal Type and Site Group. Serving Group(s) are selected and projected meal counts for each are set.

Menu Item Categories, such as Entrees, Milk, Condiments, etc., are selected for the Menu, and the number of allowable choices from the category is set. Menu Items in each category are selected individually, or all Standard Menu Items can be added by simply clicking a single button. Counts are set for each Menu Item.



B Add Menu Cycles

Two or more menus are grouped into a "Menu Cycle". A common Menu Cycle includes five menus, one for each day of the school week. However Menu Cycles can include any number of weeks, such as four to handle an entire month of Menus, and any number of days per week.



C Assign Menu Cycles

Menu Cycles are assigned to dates on a Menu Calendar. One Menu Calendar is created per month for a Site Group, Site, Meal Type, and Menu Line.

Sun	Mon	Tues	Wed	Thurs	Fri	Sat
	Fiesta Menu	German Menu	Italian Menu	Indian Menu	Asian Menu	
	Indian Menu	Asian Menu	German Menu	Italian Menu	Fiesta Menu	
	German Menu	Fiesta Menu	Indian Menu	Asian Menu	Italian Menu	
	Italian Menu	Asian Menu	Fiesta Menu	German Menu	Indian Menu	

Reports

PrimeroEdge Menu Planning provides summary and detailed information for Ingredients, Menu Items, Recipes, Food Components, and more to aid in developing Menus that meet USDA standards.

Food Components

Standard Nutrients footer
- Serving Group tab (expanded view – **Menu** / **Menu Cycle** / **Multi-Line Analysis**
- Nutrition Report – **Menu** / **Menu Cycle** / **Multi-Line Analysis**
- Food Component Report – **Menu Cycle** / **Multi-Line Analysis**
- Nutrition Summary Report – **Menu Cycle**

Reports menu
- Weekly Nutrient Analysis

Nutrients

Standard Nutrients footer
- Serving Group tab (expanded view) – **Menu** / **Menu Cycle** / **Multi-Line Analysis**
- Nutrition Report – **Menu** / **Menu Cycle** / **Multi-Line Analysis**
- Nutrition Summary Report – **Menu Cycle** / **Multi-Line Analysis**

Recipes > Quick Recipe page > Generate Report

Reports menu
- Ingredient List
- Menu Calendar
- Menu Item Nutrients
- Nutrient Standards
- Recipe Nutrition
- Recipe Book
- Weekly Nutrient Analysis

Ingredients

Recipes > Quick Recipe page > Generate Report

Reports menu
- Ingredient List
- Recipe Book

Menu Items

Reports menu
- Acceptability Factor
- Allergen Chart
- Menu Calendar
- Menu Item Nutrients

Recipes

Recipes > Scale tab
- Custom Scale Recipe
- Scale Recipe by Batch

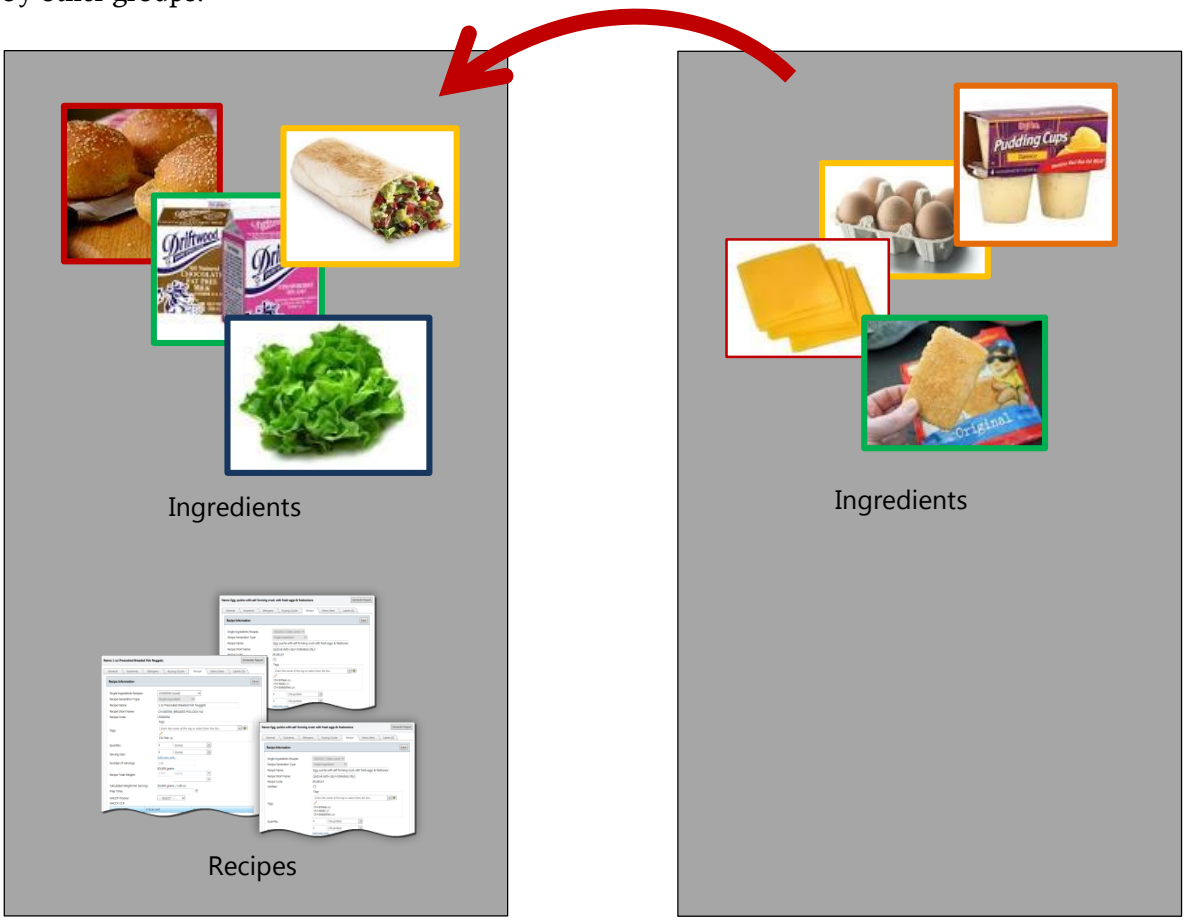
Reports menu
- Recipe Book
- Recipe Costing
- Recipe Nutrition

Data Sources

A Data Source is a container for Ingredients, Recipes, Menus, Menu Cycles, and Menu Templates which are available to and may be changed by appropriate users. When an Ingredient or Recipe is manually entered or created "from scratch," the item is stored in the "Local" Data Source. The Local users' group can use, copy or update the item as needed.

When PrimeroEdge Menu Planning is installed, the Child Nutrition Data Source is uploaded for use. This database includes Ingredients that can be used in Local Recipes. The Ingredients in the CN database are "shared" with Local users and cannot be modified. However, they can be copied to the Local Data Source and the copied items can be modified to suit local requirements.

Sharing resources in this manner saves time because items do not have to be duplicated for use by other groups.



Many pages in the Menu Planning module offer a **Data Source** selection. When you have access to multiple Data Sources, a selection can be made. When you have access only to a single Data Source that Data Source name appears in the selection box and the selection box is disabled.

End of Section

2 Ingredients

This section reviews:

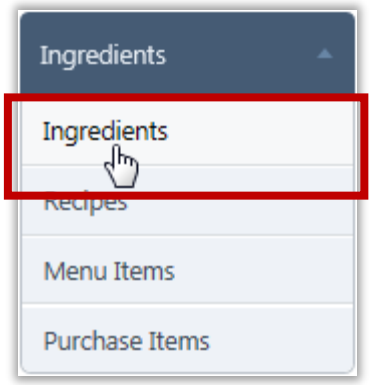
- ✓ Adding a new Ingredient or Recipe.
- ✓ Creating a Single Ingredient Recipe.
- ✓ Adding nutrient, allergen and buying guide information for an Ingredient.
- ✓ Uploading nutrition labels and other documents for an Ingredient.
- ✓ Copying and printing Ingredients and Recipes.
- ✓ Creating a Menu Item.
- ✓ Adding food component contributions for Menu Items.
- ✓ Scaling a Recipe by batch size or number of servings.
- ✓ Creating and maintaining Purchase Items links for Ingredients in the **[Inventory]** module.

Ingredients at a Glance

Menu Function	Description
Ingredients	Add and manage local ingredients with nutrient, allergen, and buying guide information; create menu item with an ingredient; upload nutrition labels and other documents; copy and print ingredient information.
Recipes	Add and manage local Recipes with ingredient, nutrition, and allergen information; scale recipes by batch size or number of servings; find and view USDA and Child Nutrition recipes; add meal pattern food contributions; copy and print recipes.
Menu Items	Find and display Recipes and Ingredients through search of Menu Item details.
Purchase Items	Create links from Ingredients in Menu Planning to items in Inventory for purchasing control.

Note: Menus and functions to which you have access are those appropriate for your role with PrimeroEdge. When you access the **Ingredients** menu, you may see a subset of the functions listed above.

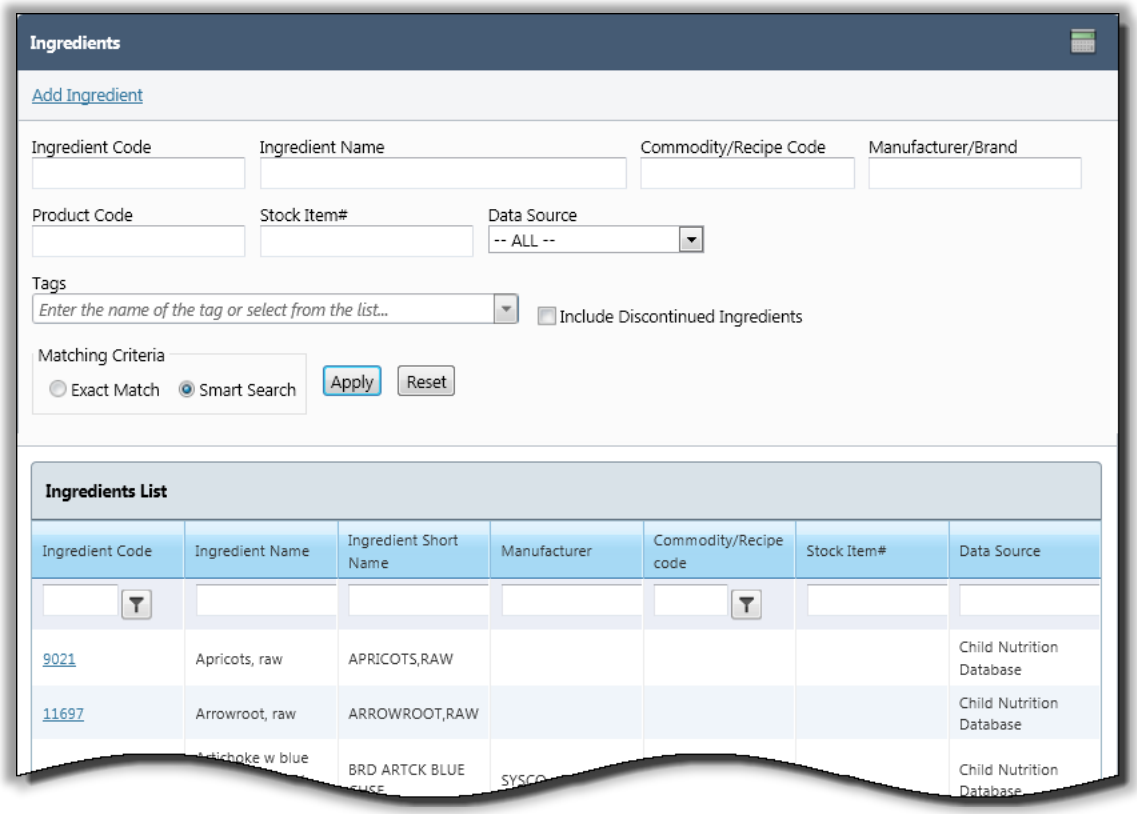
Ingredients



Ingredients allows you to:

- Search for an Ingredient with single or multiple search criteria.
- Add new Ingredients or copy existing Ingredients.
- Maintain Ingredient data.
- Create a Single Ingredient (SI) Recipe.
- Generate an Ingredient List Report for an Ingredient.

Ingredients Page



By default on the initial **Ingredients** page:

- **Data Source** is set to "ALL"**.**
- **Smart Search** is enabled (check mark added) to look for the entered string anywhere in the Ingredient name.
- All remaining search conditions are blank or not enabled.

Page Functions

Button/Link	Description
Add Ingredient	Click to display the **Quick Ingredients** page to enter a name for a new Ingredient.
Apply	Click to display a list of Ingredients that match the selected conditions.
Reset	Click to return all settings in the search condition fields to the default values.

Ingredients List

Column Header	Description
Ingredient Code	Code to identify Ingredient; code may be either automatically assigned by the system, or may be a custom code entered by the user.
Ingredient Name	Complete Ingredient name; name may be either a common name such as "flour", or the manufacturer's name, such as "Angel Wings All Purpose Baking Flour".
Ingredient Short Name	Brief, common name for Ingredient, such as "flour".
Manufacturer	Name of the Ingredient manufacturer.
Commodity/Recipe Code	USDA or manufacturer's code, or similar, to identify the ingredient in the USDA/manufacturer's product offerings.
Stock Item #	Inventory item number.
Data Source	Database in which Ingredient is stored.
Status	Appears only when the **Include Discontinued Ingredients** option is enabled (check mark added); indicates "inactive" for all discontinued Ingredients.

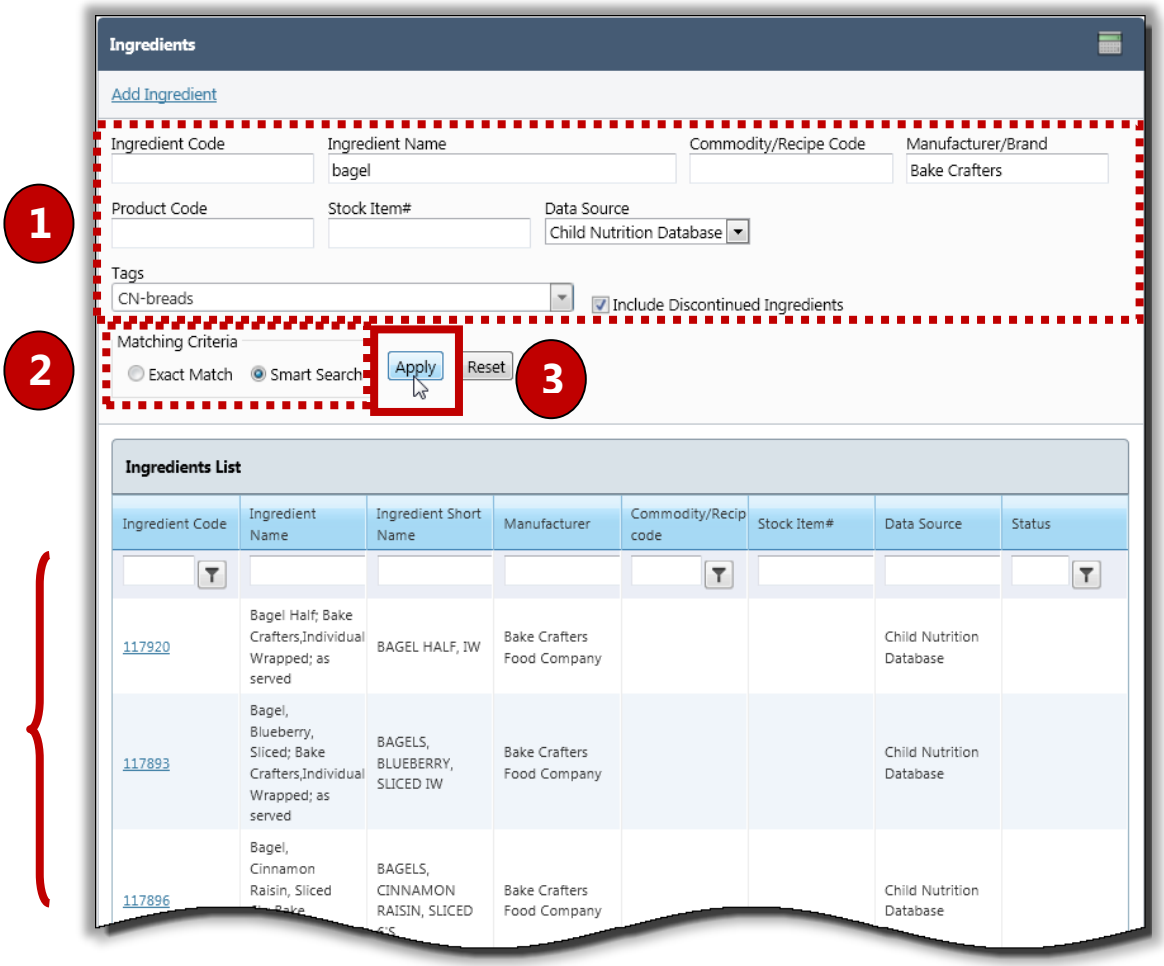
Searching for an Ingredient

Nine separate search conditions can be used to narrow your search for an Ingredient. One of two **Matching Criteria** is selected to tell PrimeroEdge how to use the search conditions in the search:

- **Exact Match** – make only an exact match with the entered text or selected conditions; no variations of text strings will be matched, i.e., applying an Exact Match for "bagel" will not match records with the strings "bagels", "bagel half", "sliced bagel", etc.
- **Smart Search** – make matches with any string that includes the entered string; any variation will be matched, i.e., applying a Smart Search for "bagel" will match records with the strings "bagels", "bagel half", "sliced bagel", etc.

To search for an Ingredient

1. Enter or select one or more search conditions.
2. Choose a **Matching Criteria**.
3. Click Apply .

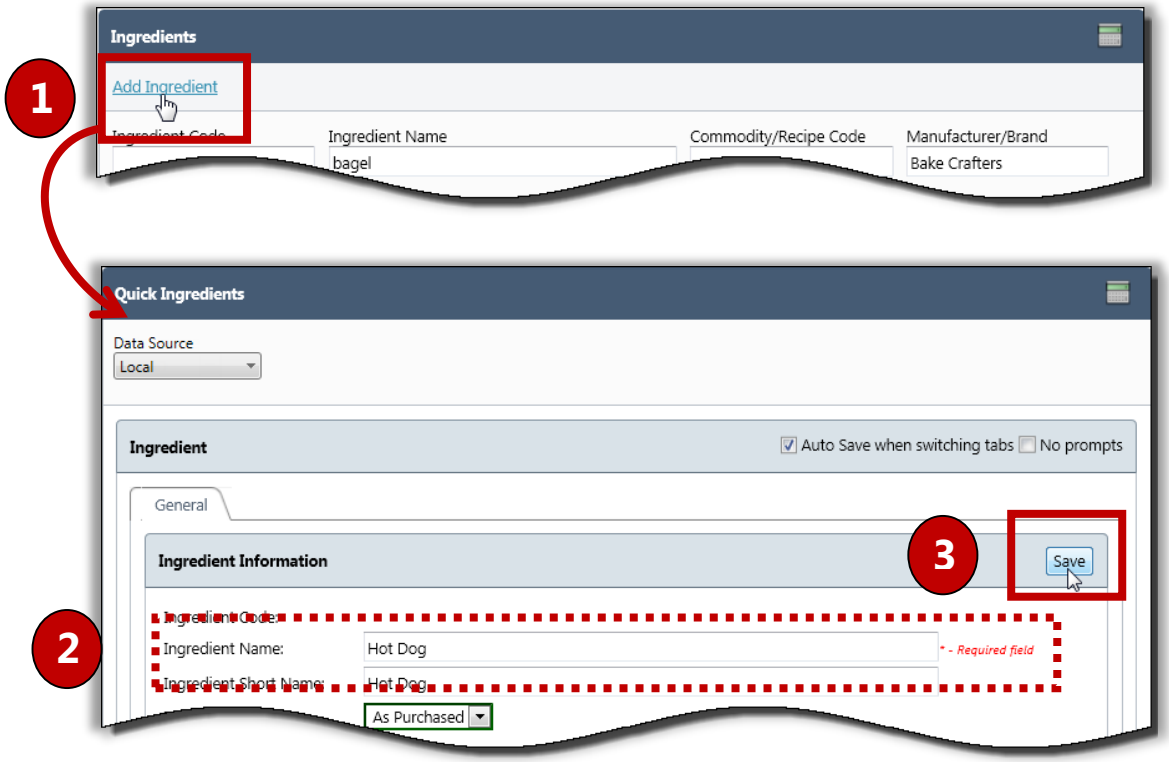


Adding a New Ingredient

To add a new Ingredient, you only need to enter a name for the Ingredient. Clicking Save automatically applies an Ingredient Code and marks the ingredient as "Active". Several new tabs appear on which you will enter data for the new Ingredient.

To add a new ingredient

1. Click the **Add Ingredient** link.
2. Enter the Ingredient name and short name.
3. Click Save .

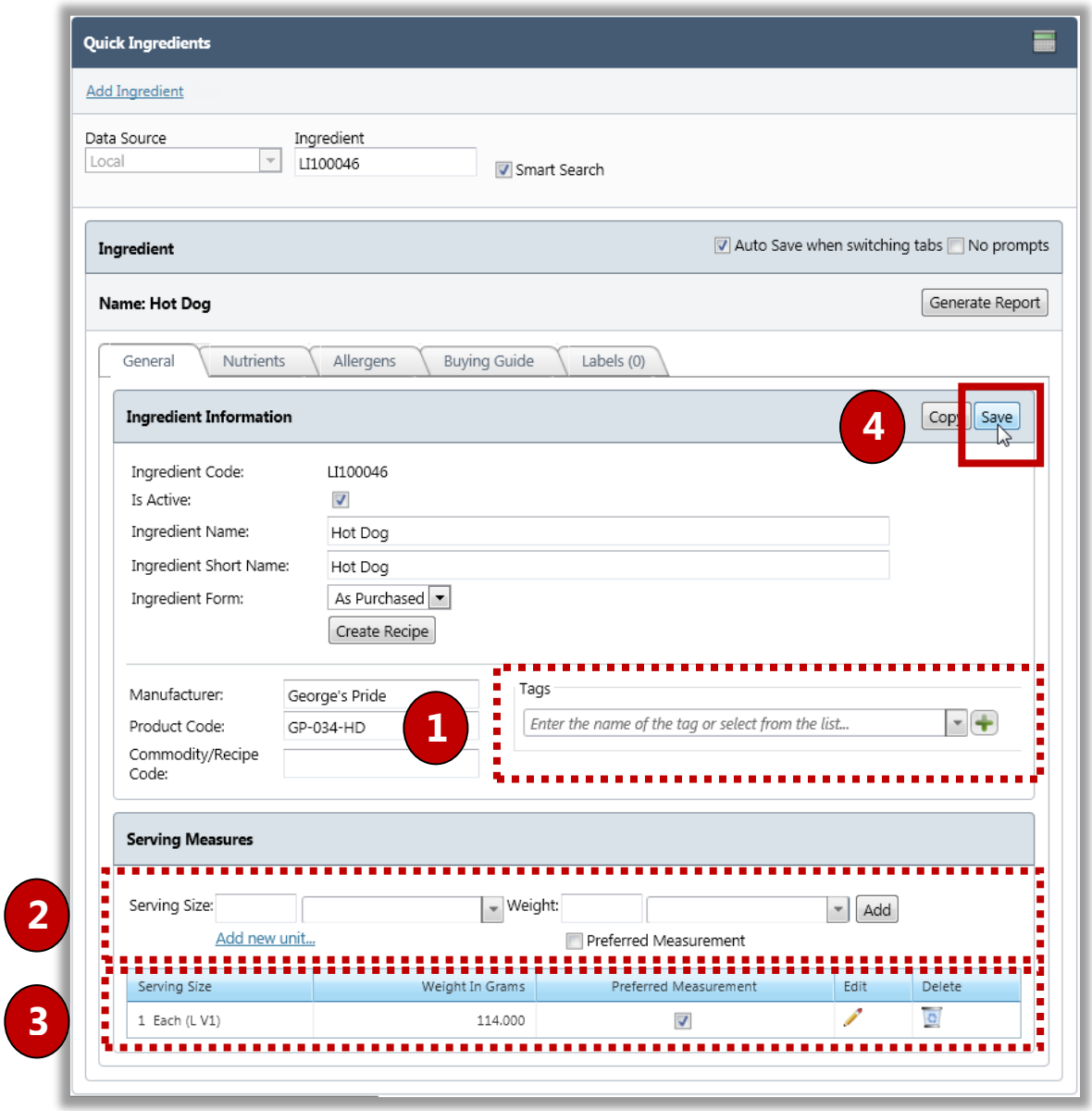


Tab 1: General

The **General** tab includes basic information about the Ingredient, such as the Ingredient Code and Ingredient Name.

To complete the General tab:

1. Create **Tags** to help narrow a search for the ingredient. See Appendix B: Working with PrimeroEdge Tools.
2. Enter **Serving Sizes** for specific Serving Groups.
3. Set the **Preferred Measurement** for the default selection when creating Menu Items.
4. Click Save .

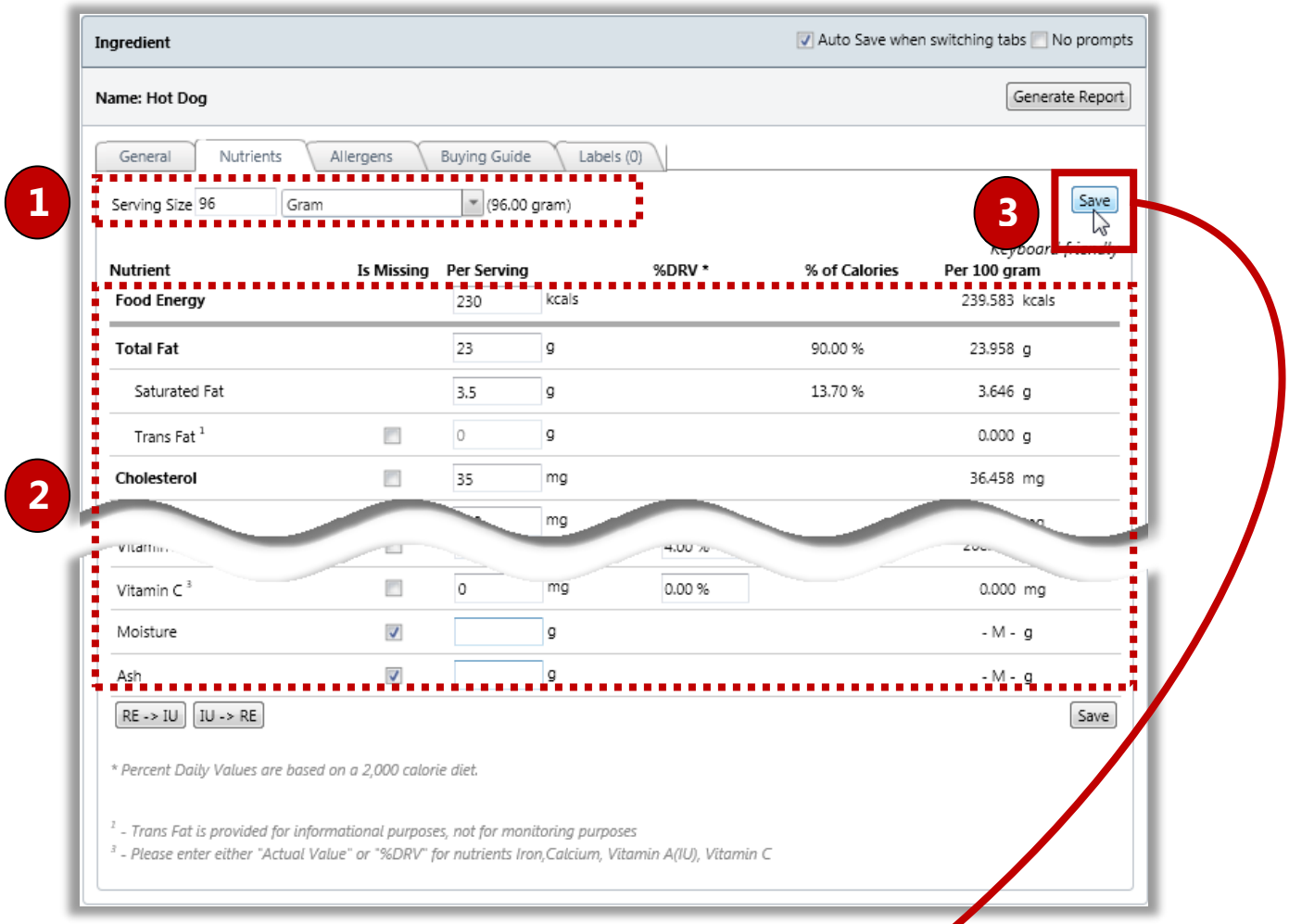


Tab 2: Nutrients

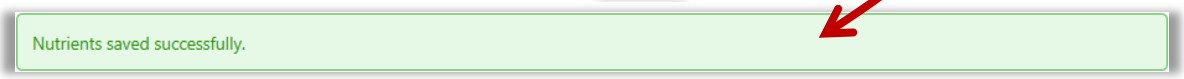
The **Nutrients** tab lists all nutrient values for a set **Serving Size**. These values are used in calculations for various nutritional reports and tools.

To complete the Nutrients tab:

1. Enter a value in **Serving Size.**
2. Enter values in **Per Serving** for each nutrient, selecting **Is Missing** when a value is not provided or available.
3. Click Save .



A save success message appears after clicking Save .

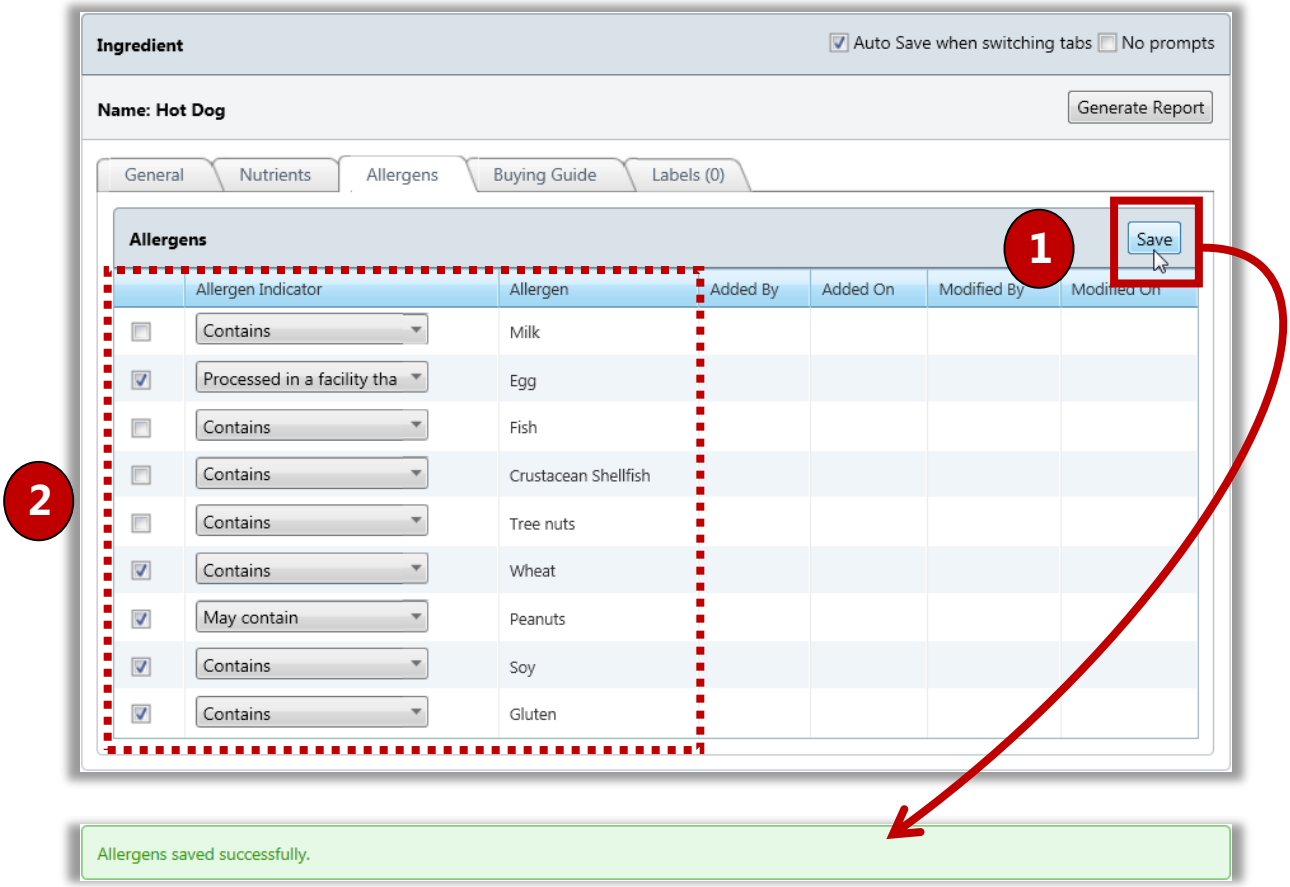


Tab 3: Allergens

The **Allergens** tab lists all allergens along with an allergen indicator that specifies the allergen level in the Ingredient.

To complete the Allergens tab:

1. Enable each allergen, as needed, and select a corresponding allergen indicator.
2. Click Save .



Tab 4: Buying Guide

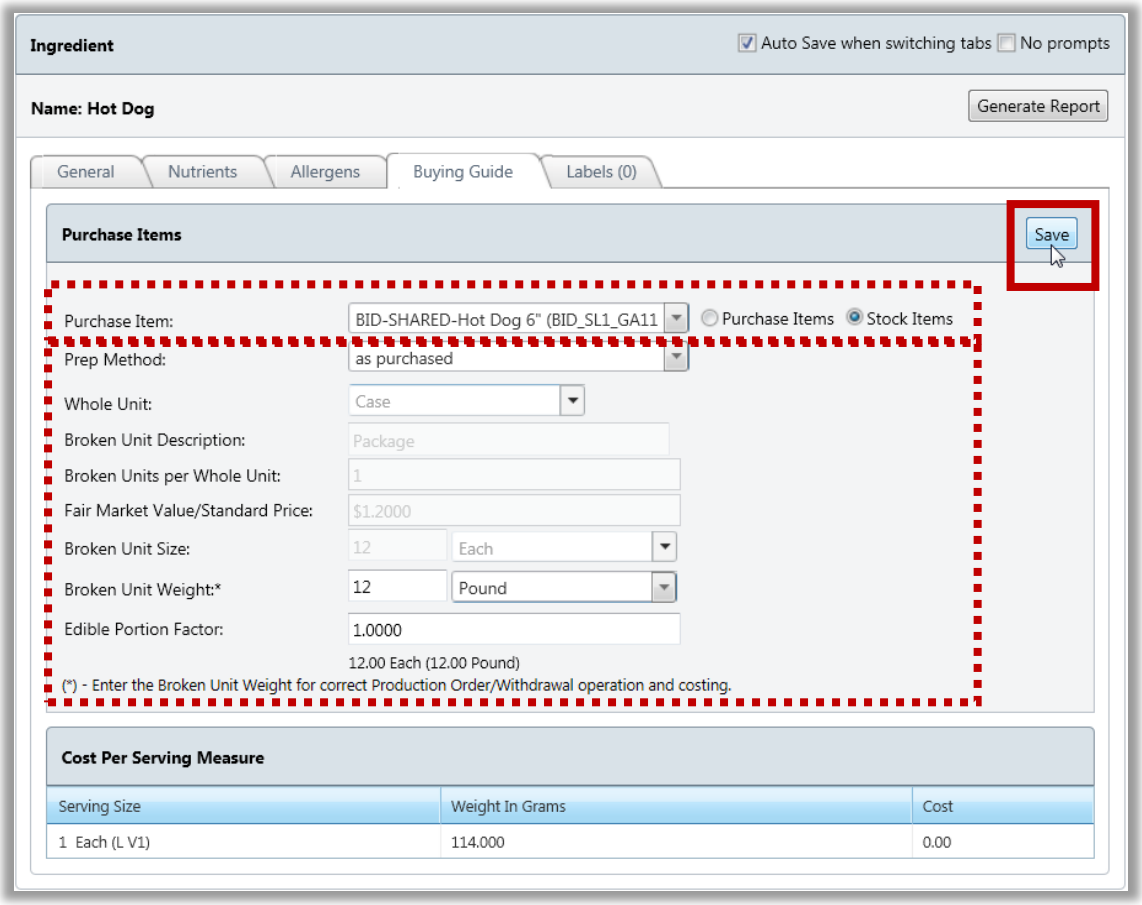
The **Buying Guide** tab provides information on how the ingredient is obtained.

- If your district uses the PrimeroEdge **[Inventory]** module, Ingredients in the **[Menu Planning]** module can be linked to a *stock item* maintained in inventory.
- If your district does not use the PrimeroEdge **[Inventory]** module, *purchase items* are created for each Ingredient.

Note: You must enter either a **Broken Unit Weight** or **Edible Portion** value when using the PrimeroEdge **[Production]** and **[Inventory]** modules with the **[Menu Planning]** module so that correct processing of items occurs.

To complete the Buying Guide tab:

1. Enable either **Purchase Items** or **Stock Items**, and select an item from the drop-down list.
2. For the remaining fields:
   - For **Stock Items**, several fields are completed for you. Select a **Prep Method** and **Broken Unit Weight**, and enter the **Edible Portion Factor**.
   - For **Purchase Items**, select or enter data for each field.
3. Click Save .

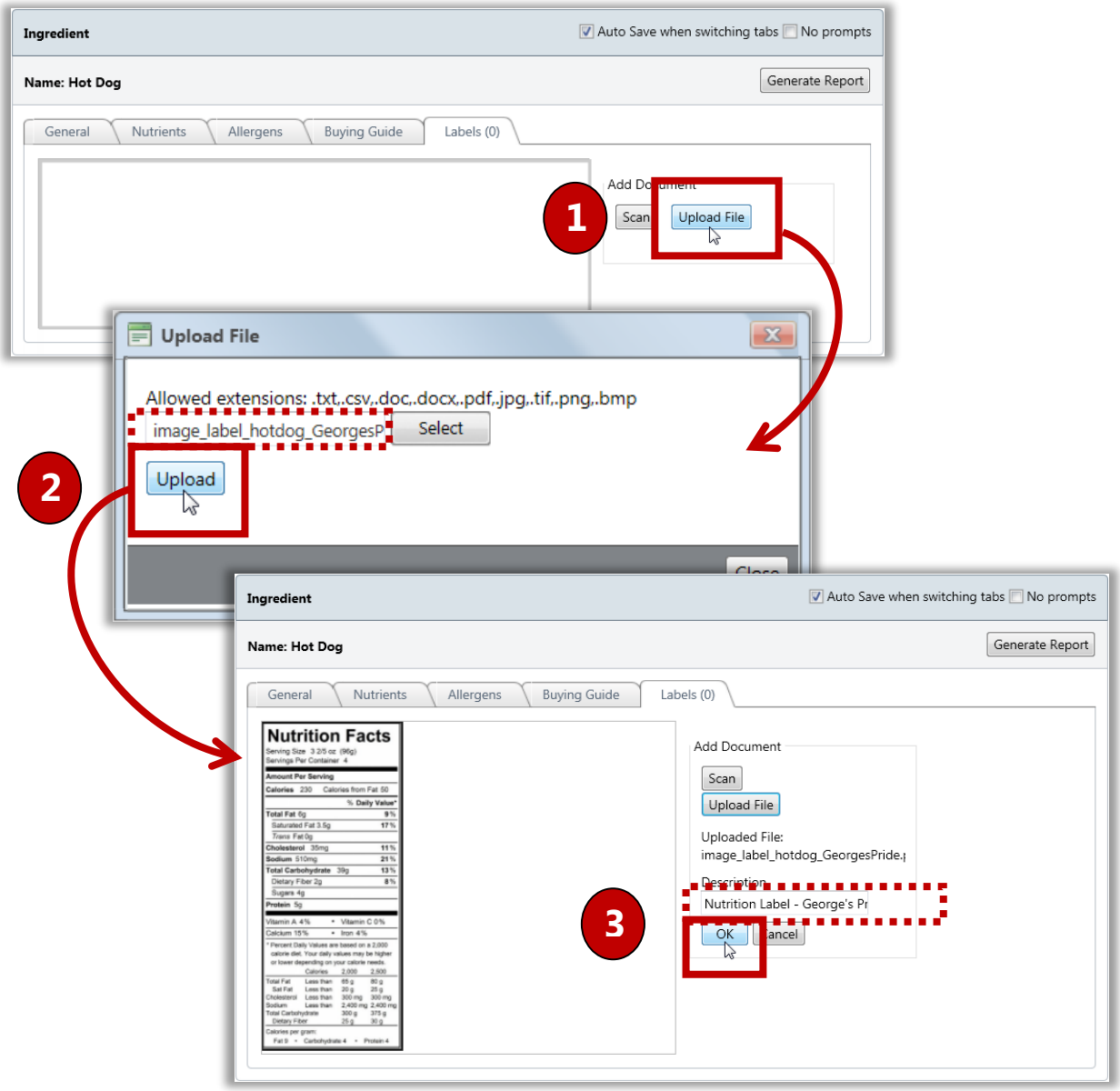


Tab 5: Labels

The **Labels** tab allows you to upload nutrition label images, product images, or other files, such as word processing documents, spreadsheets, and more, to provide supporting documentation.

To add a label

1. Click Upload File and select a file.
2. Click Upload .
3. Enter a name for the file and click OK .

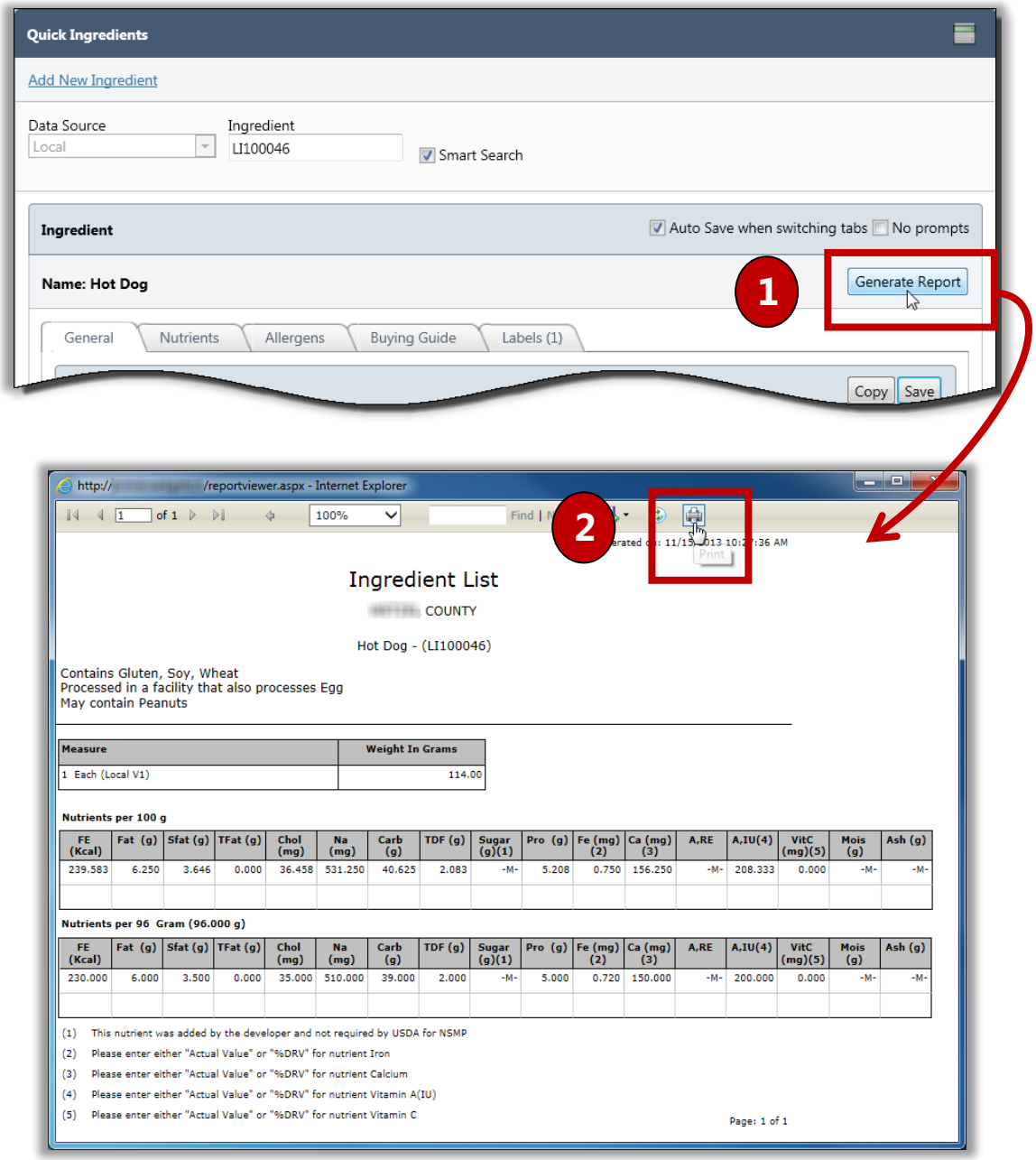


Generating an Ingredient List Report

The Ingredient List report includes the Ingredient Name, Ingredient Code, all serving measurements, and nutrients values per serving and per 100 grams.

To generate an Ingredient List report:

1. Click Generate Report .
2. Click **Print** ( ) on the report viewer toolbar.

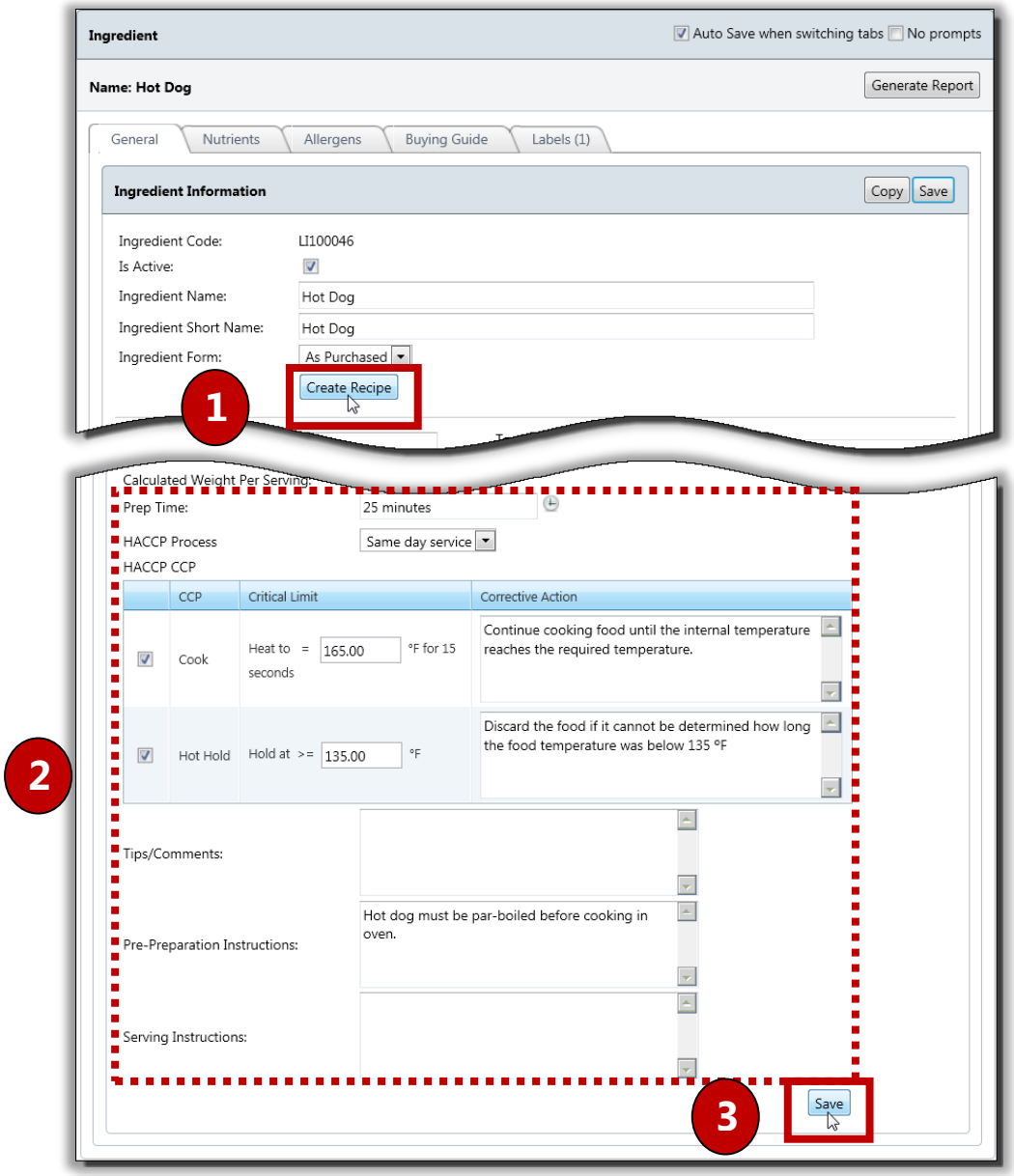


Creating a Recipe from a Single Ingredient

To set up a purchased item as a Menu Item, the purchased item is 1) added as an ingredient, and then, 2) a recipe is created with the Ingredient. Two new tabs appear, **Recipe** and **Menu Item** which allow you to set up the new ingredient/recipe as a Menu Item (see **Section 2: Recipes** for information on these tabs). This type of recipe is called a "Single Ingredient (SI) recipe."

To create a Single Ingredient recipe:

1. Click Create Recipe .
2. Enter recipe information such as **Prep Time**, **HACCP Process**, **Tips**, and instructions.
3. Click Save .

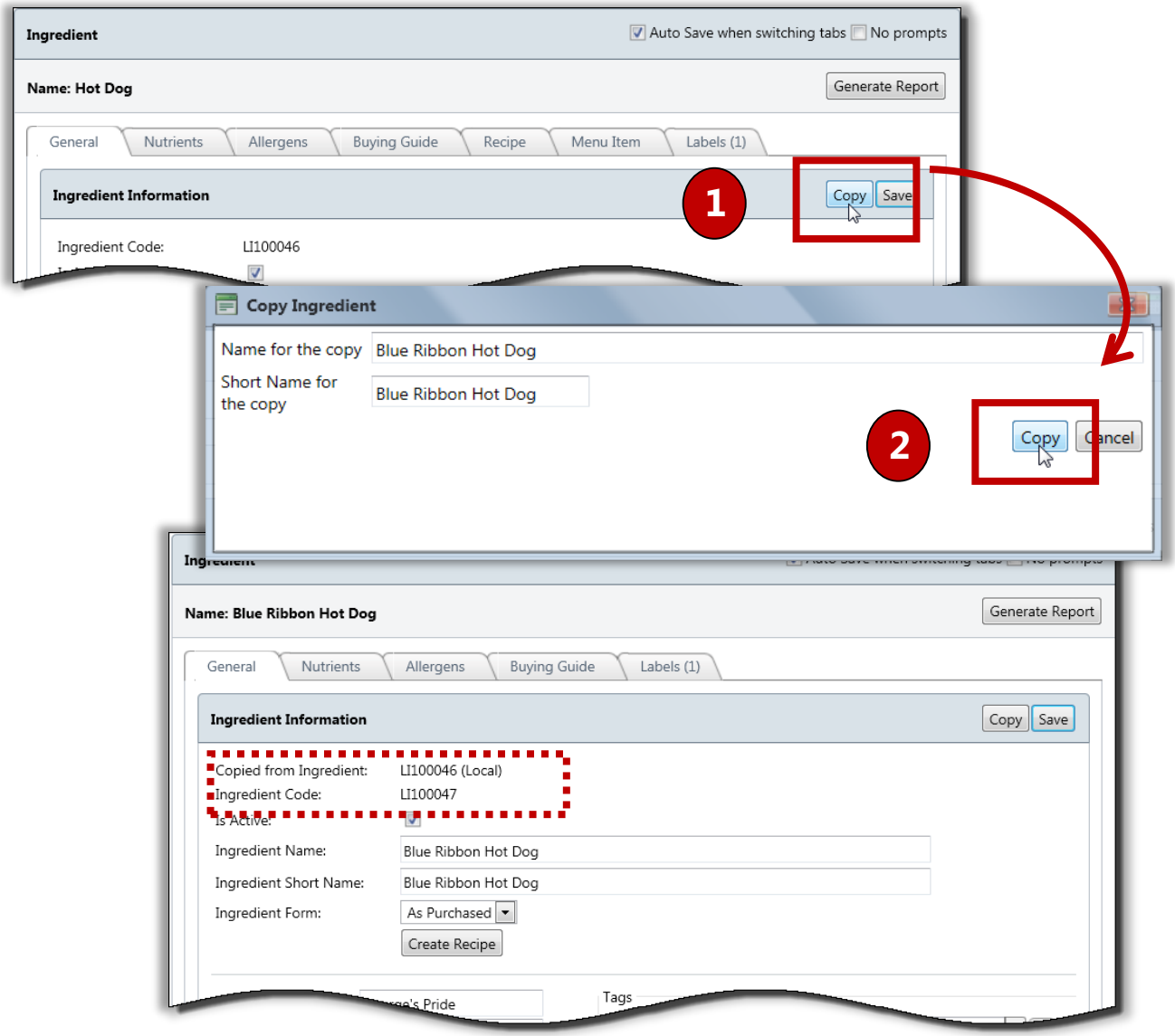


Copying an Ingredient

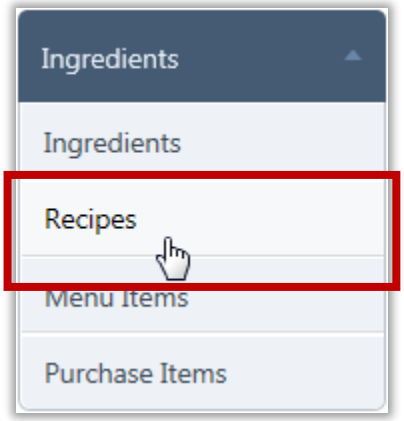
When copying any Ingredient, you will enter a name and a short name for the copied Ingredient. PrimeroEdge automatically creates the Ingredient Code (based on **Recipes – Auto Generate Recipe Codes** system setting). The original Ingredient is listed on the **General** tab above the copied Ingredient code.

To copy an Ingredient:

1. Click Copy .
2. Enter a name for the copy and click Copy .



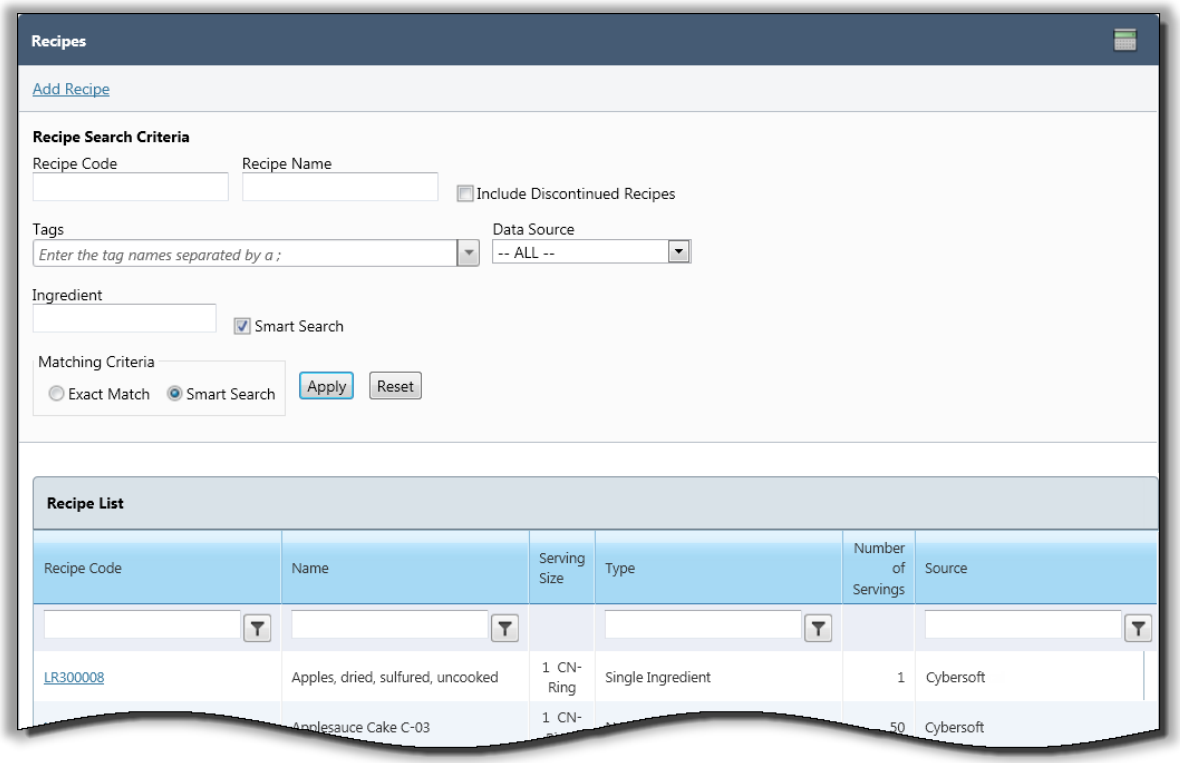
Recipes



Recipes allows you to:

- Search for a Recipe using single or multiple search criteria.
- Add new Recipes or copy existing Recipes.
- Maintain Recipe data.
- Create Menu Items with a Recipe.
- Generate a Nutrition Report (nutrient data) for a Recipe.
- Generate a Recipe Report (all Recipe data).
- Scale a Recipe by batch or by servings.

Recipes Page



By default on the **Recipes** page:

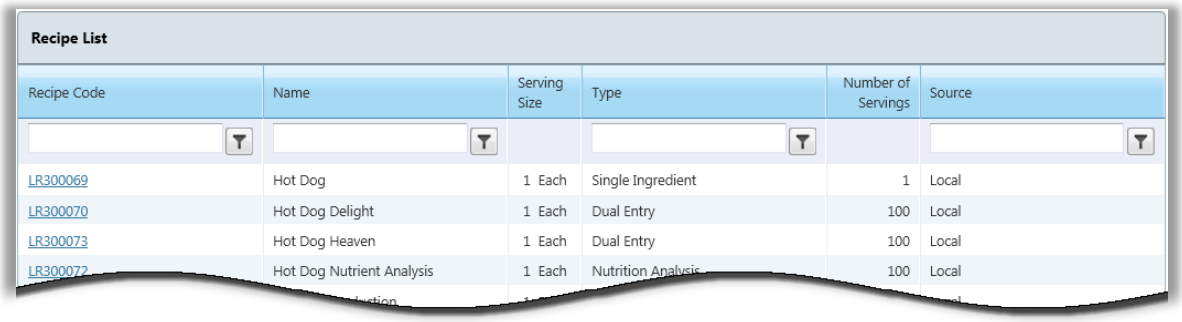
- **Data Source** is set to "ALL".
- **Smart Search** is enabled (check mark added) for **Ingredient**.
- **Matching Criteria** is set to "**Smart Search**"

By default all ***active*** recipes that meet the search criteria are included in the search results. To also include ***inactive*** recipes in the search results, enable the **Include Discontinued Recipes** option (add check mark).

Page Functions

Button/Link	Description
Add Recipe	Click to display the **Quick Recipes** page to enter a name for a new Recipe.
Apply	Click to display all Recipe records in the **Recipe List** that match the set search conditions.
Reset	Click to return all search criteria fields to the default settings.

Recipe List Listings



Recipe List

Recipe Code	Name	Serving Size	Type	Number of Servings	Source
LR300069	Hot Dog	1 Each	Single Ingredient	1	Local
LR300070	Hot Dog Delight	1 Each	Dual Entry	100	Local
LR300073	Hot Dog Heaven	1 Each	Dual Entry	100	Local
LR300072	Hot Dog Nutrient Analysis	1 Each	Nutrition Analysis	100	Local

Column Header	Description
Recipe Code	Code assigned when the Recipe is created
Name	Recipe Name
Serving Size	Preferred serving measurement
Type	Recipe type can be one of the following: ▪ Nutrition Analysis – uses Ingredients set up in **[Menu Planning]** ▪ Production – uses Purchase Items which are Ingredients linked to Inventory items in the **[Inventory]** module ▪ Dual Entry – uses Ingredients and/or Purchase Items ▪ Single Ingredient – includes only one ingredient; this type of recipe is usually created from purchased items that are served as is, such as a "bagel"
Number of Servings	Number of servings made with one iteration of the recipe
Source	Database (Data Source) in which the Recipe is stored

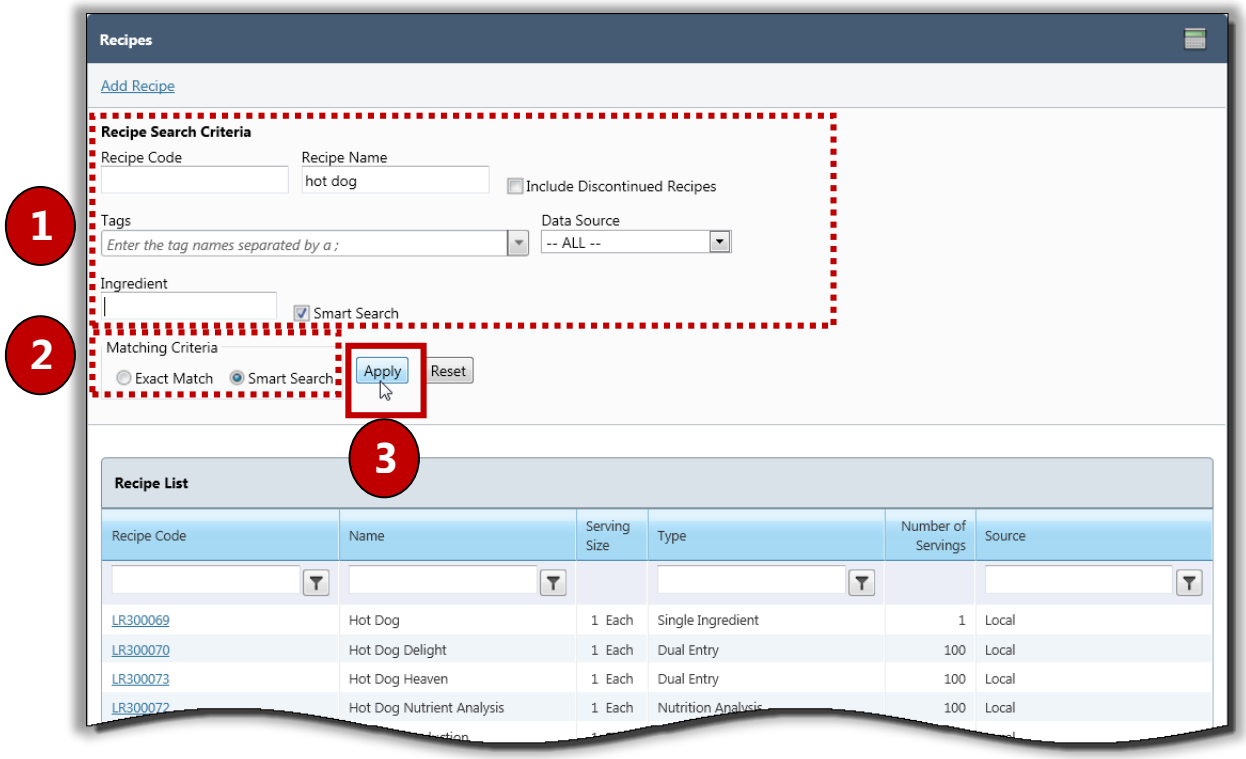
Searching for a Recipe

Seven separate search conditions can be used to narrow your search for a Recipe. One **Matching Criteria** option is selected to tell PrimeroEdge how to use the search conditions in the search:

- **Exact Match** – make only an exact match with the entered text or selected conditions; no variations of text strings will be matched, i.e., applying an Exact Match for "bagel" will not match records with the strings "bagels", "bagel half", "sliced bagel", etc.
- **Smart Search** – make matches with any string that includes the entered string; any variation will be matched, i.e., applying a Smart Search for "bagel" will match records with the strings "bagels", "bagel half", "sliced bagel", etc.

To search for a Recipe

1. Enter or select one or more search conditions.
2. Choose a **Matching Criteria**.
3. Click Apply .



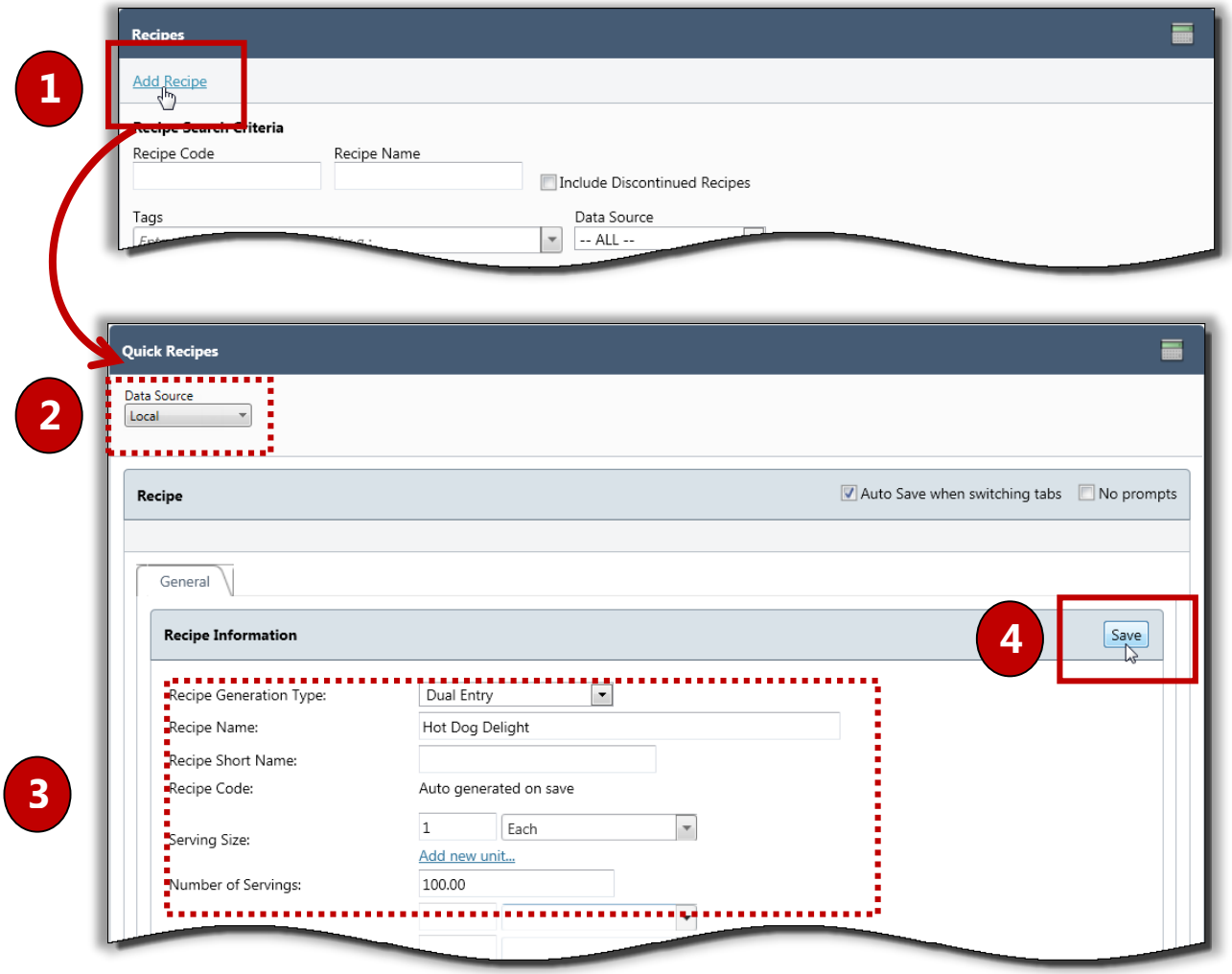
Adding a New Recipe

Three types of recipes can be added:

- Nutrition Analysis – allows for selection of Ingredients set up in the **[Menu Planning]** module.
- Production – allows for selection of Purchase Items set up in the **[Inventory]** module.
- Dual Entry – allows for selection of either a Purchase Item or an Ingredient when adding Ingredients/Steps to the recipe.

To add a new Recipe

1. Click the **Add Recipe** link.
2. Select the **Data Source**, if needed/available.
3. Select the **Recipe Generation Type** and enter the **Recipe Name, Serving Size**, and **Number of Servings** on the **General** tab.
4. Click Save .

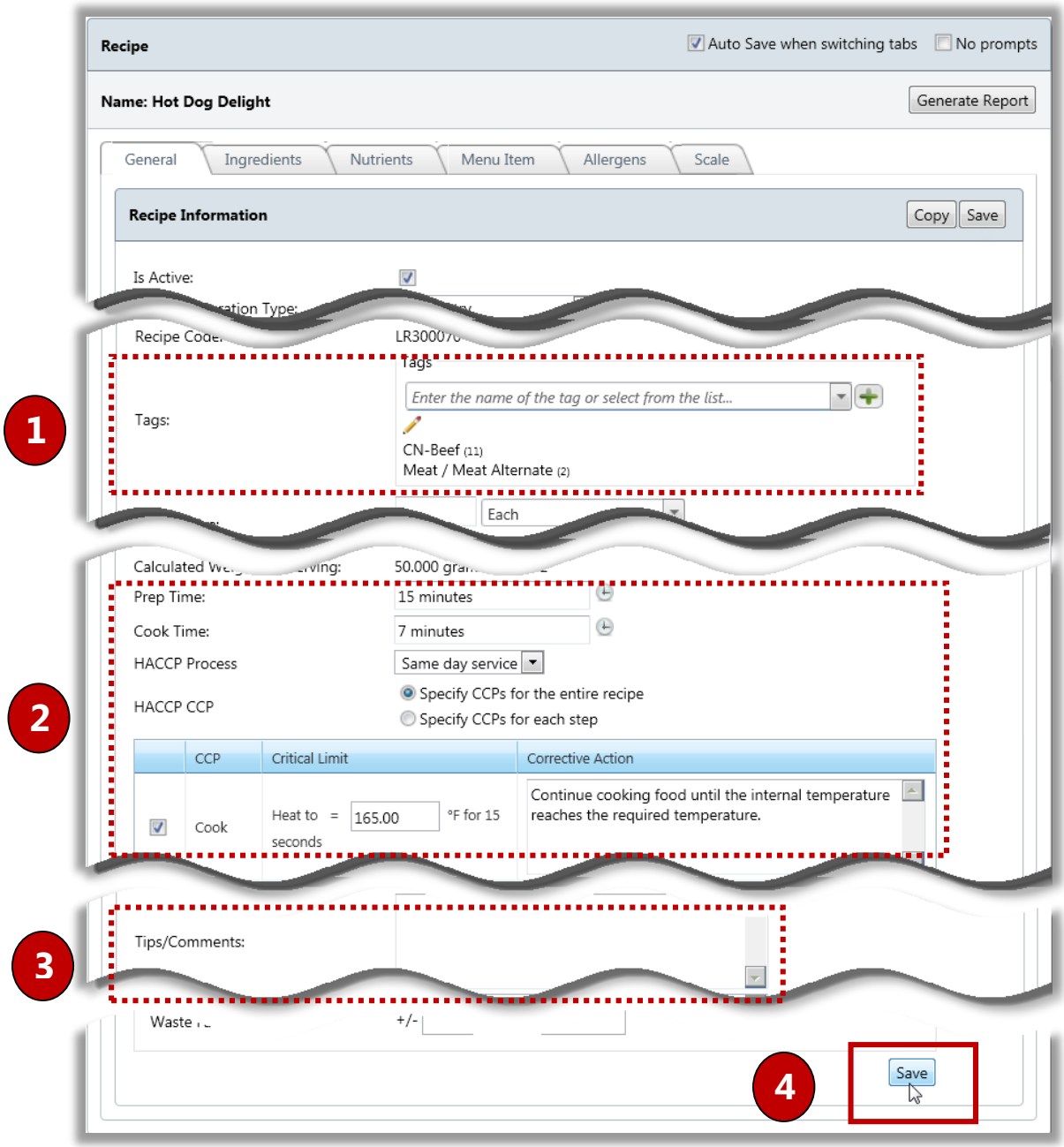


Tab 1: General

Several additional fields appear on the **General** tab after saving to collect general recipe details.

To complete the General tab

1. Set up **Tags**, if needed.
2. Enter **Prep Time** and **Cook Time**, and select a **HACCP Process**.
3. Enter **Tips**, **Comments** or **Special Instructions**, as needed.
4. Click Save .

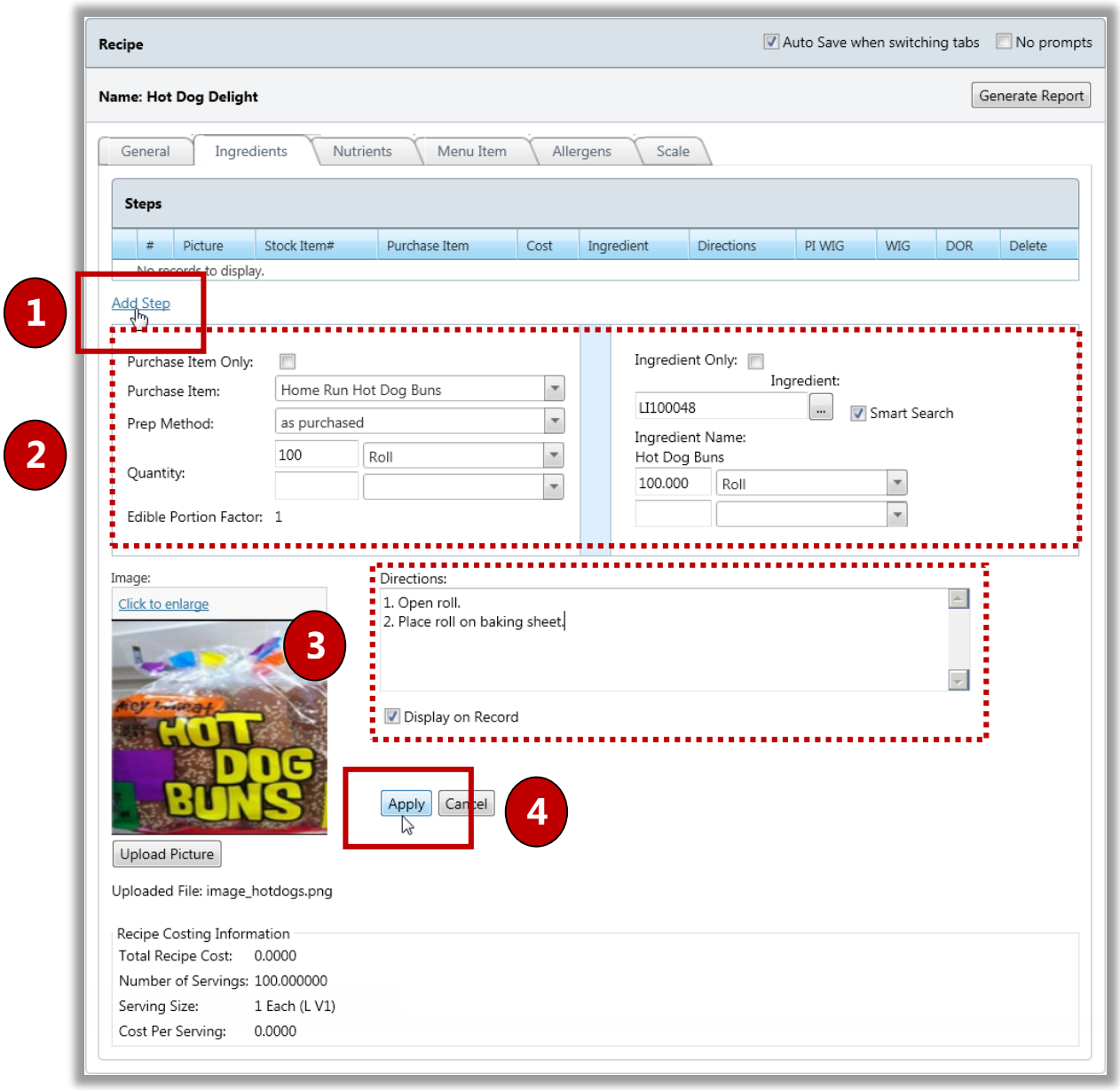


Tab 2: Ingredients

The **Ingredients** tab lists all recipe Ingredients and all steps used in the recipe. An image of the Ingredient can be uploaded and then displayed on the Ingredients tab by setting the [Recipes – Display Pictures in Recipes] system setting.

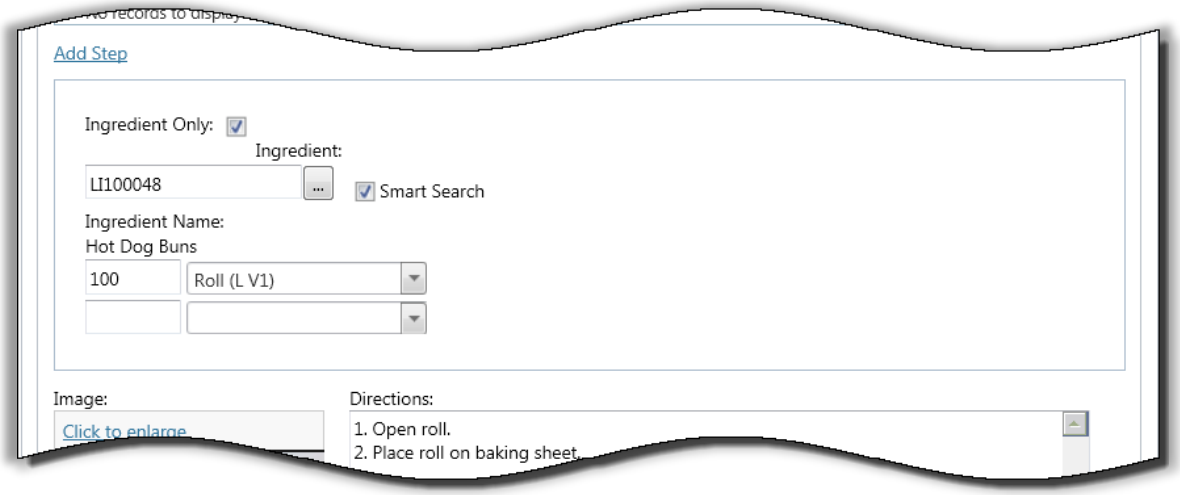
To add an ingredient/step:

1. Click the **Add Step** link.
2. Select a **Purchase Item** or **Ingredient** and enter the **Quantity** needed.
3. Enter **Directions**.
4. Click Apply .



Notes on Selecting a Purchase Item or Ingredient.

If you create Nutrition Analysis Recipes, the **Ingredients** tab appears similar to the image below. Ingredients for each step are selected from the list of all ingredients set up in PrimeroEdge **[Menu Planning]**.



If you create Production Recipes, the **Ingredients** tab appears similar to the image below. Purchase Items for each Recipe step are selected. Purchase Items are items stored in the PrimeroEdge **[Inventory]** module. Ingredients in the **[Menu Planning]** module are linked to inventory items in the **[Inventory]** module through the **Purchase Items** menu selection. The **Ingredients** tab provides **Recipe Costing Information** based on the item's pricing information stored in the **[Inventory]** module.

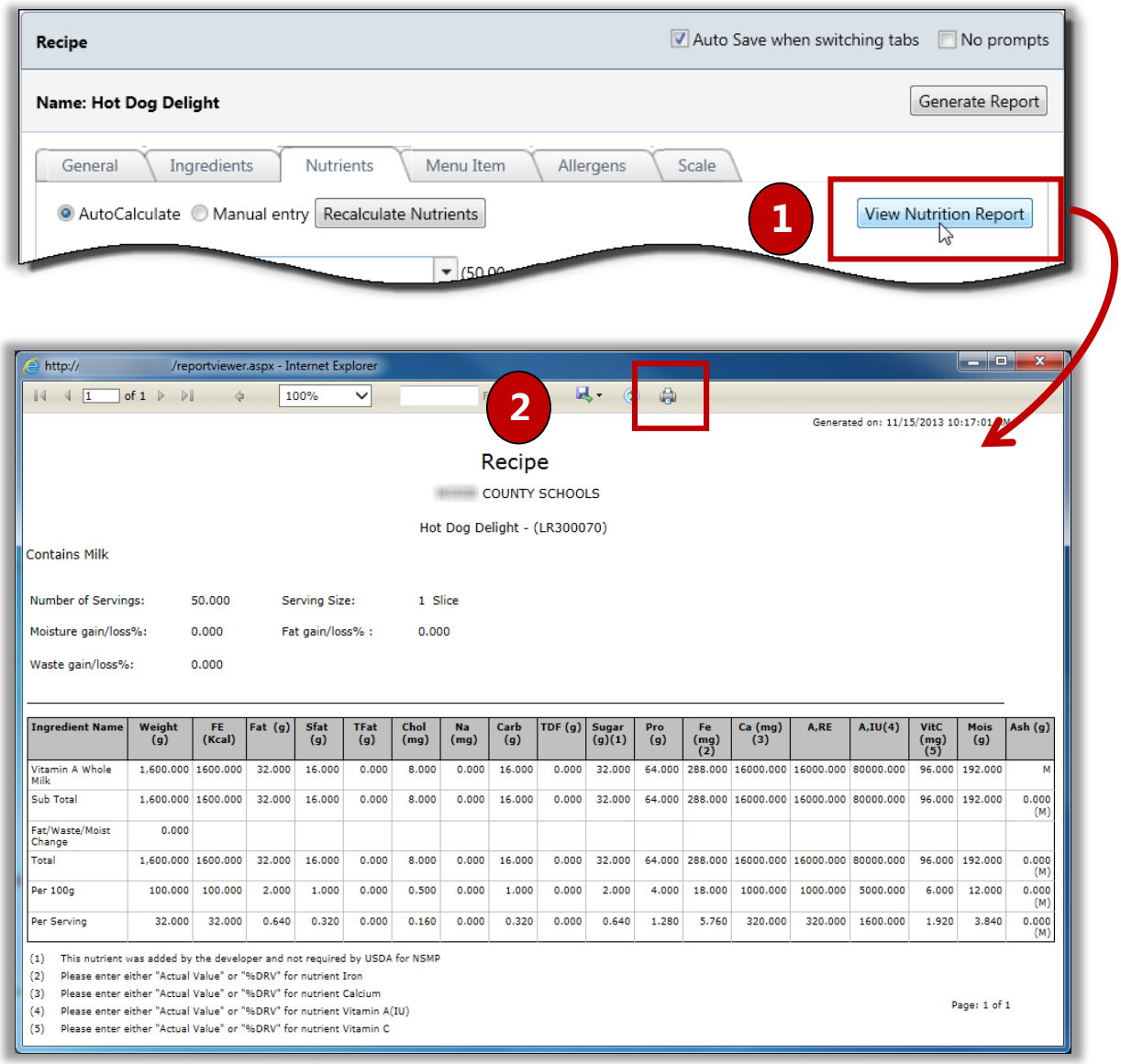
The **Ingredients** tab image shown on the previous page appears when you create a "Dual Entry" recipe type where you can select either a Purchase Item or an Ingredient.

Tab 3: Nutrients

The **Nutrients** tab displays nutrient information totals for all ingredients used in the recipe. By default, calculation of recipe nutrient information is set to "**AutoCalculate**" . Any change to the recipe, such as changing ingredients or serving sizes, automatically triggers an automatic recalculation of total nutrient values.

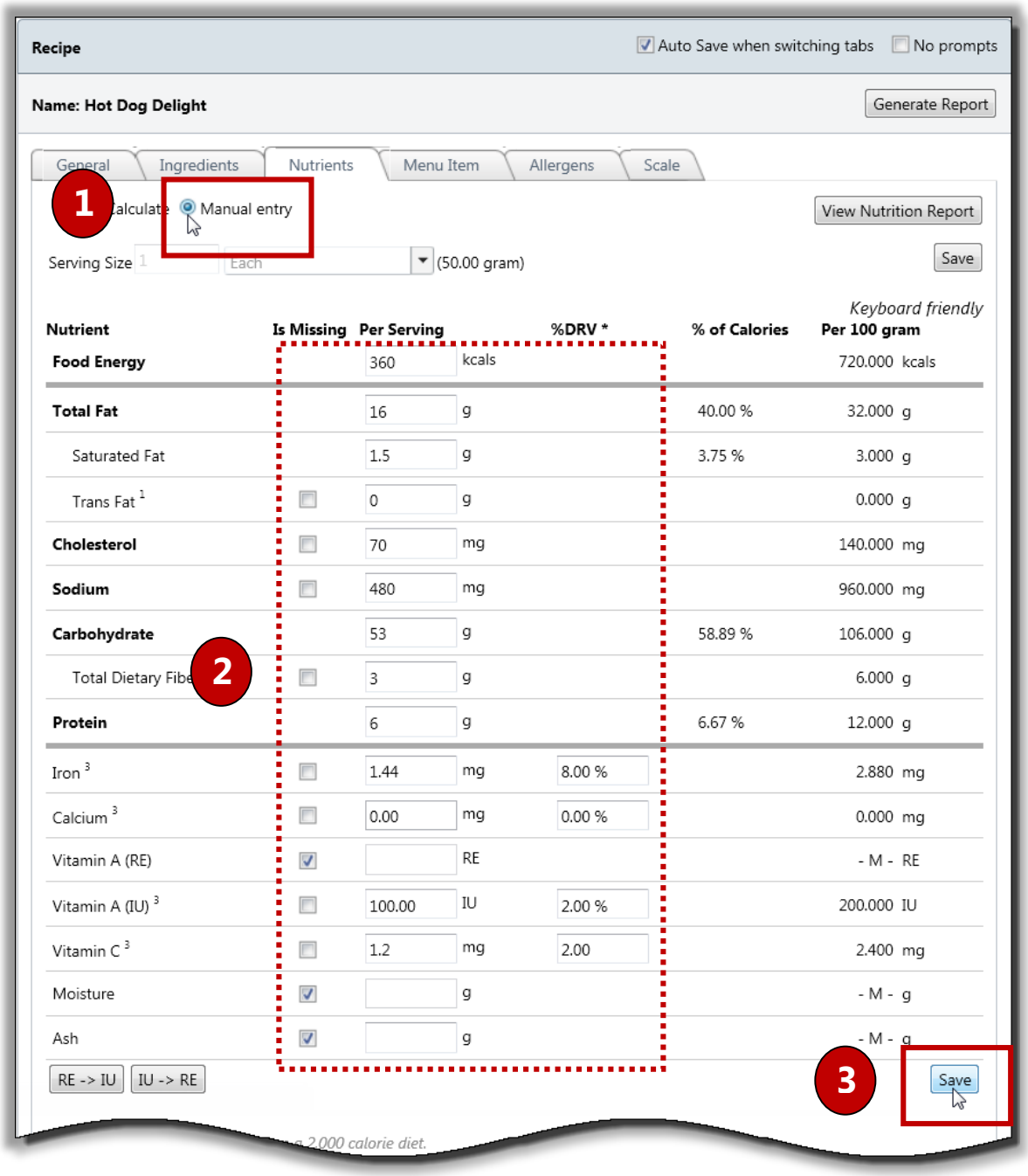
To view and print a recipe Nutrition Report

1. Click View Nutrition Report .
2. Click **Print** ( ) on the window toolbar.



To manually enter nutrient values

1. Click "**Manual entry**".
2. Enter nutrient values in **Per Serving** or select the **Is Missing** option when values are not available.
3. Click Save .

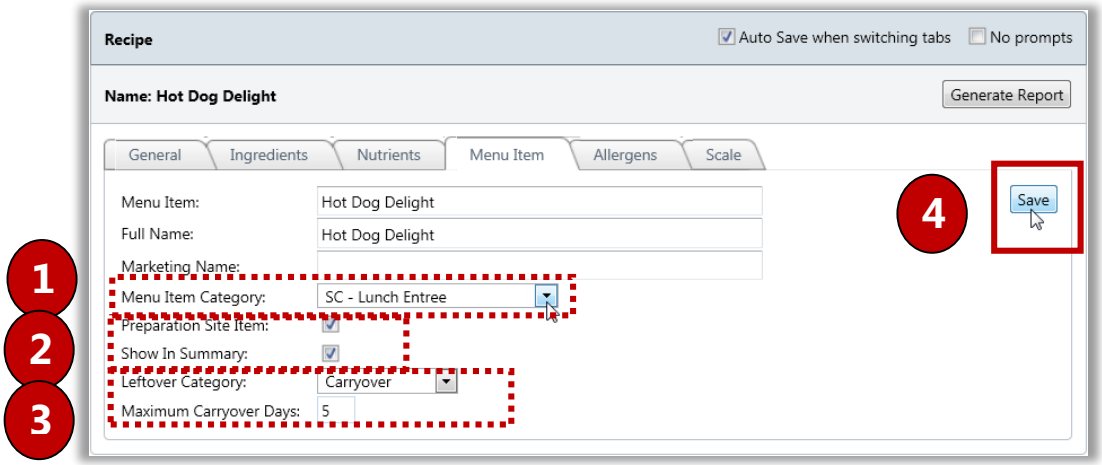


Tab 4: Menu Item

A Menu Item is created from a recipe. One or more Menu Items are placed on Menus.

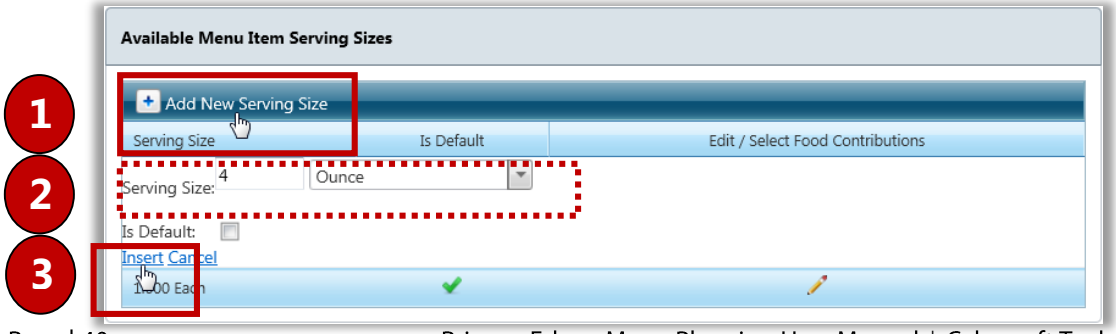
To create a Menu Item

1. Select a **Menu Item Category**.
2. Enable options as needed.
   - **Preparation Site Item** – when the Menu Item is to be produced by a Preparation site.
   - **Show In Summary** – when only the Menu Item name is to be shown on the **Menu Calendar** report when the **Show Summary Items Only** option is selected on the **Menu Calendar** page; also specifies to show the item in the "month" calendar view in ParentOnline – this controls the amount of information shown for large menus.
3. Select a **Leftover Category**; enter the **Maximum Carryover Days** if "Carryover" is selected; a default maximum number of Carryover Days can be set through the [Menu Items – Default Maximum Carryover Days] system setting.
4. Click Save .



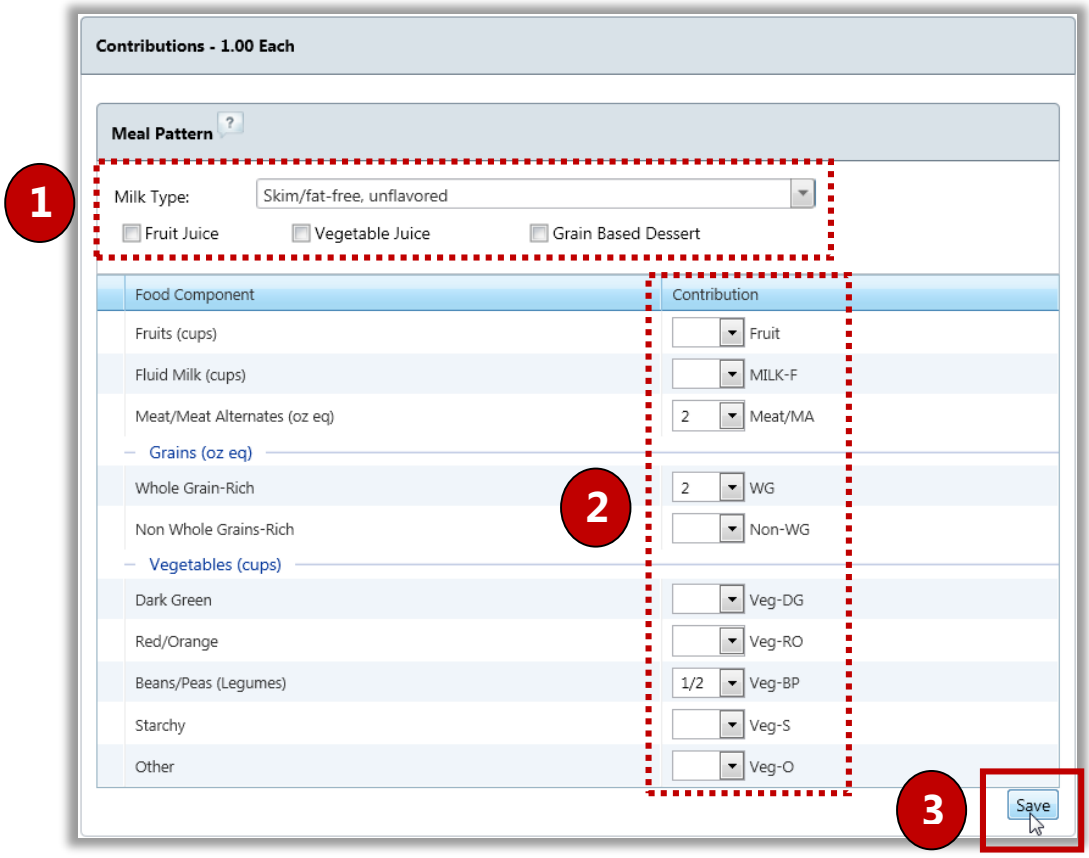
To add an available Menu Item serving size:

1. Click Add New Serving Size .
2. Enter a **Serving Size** and select a serving measurement.
3. Click the [Insert] link.



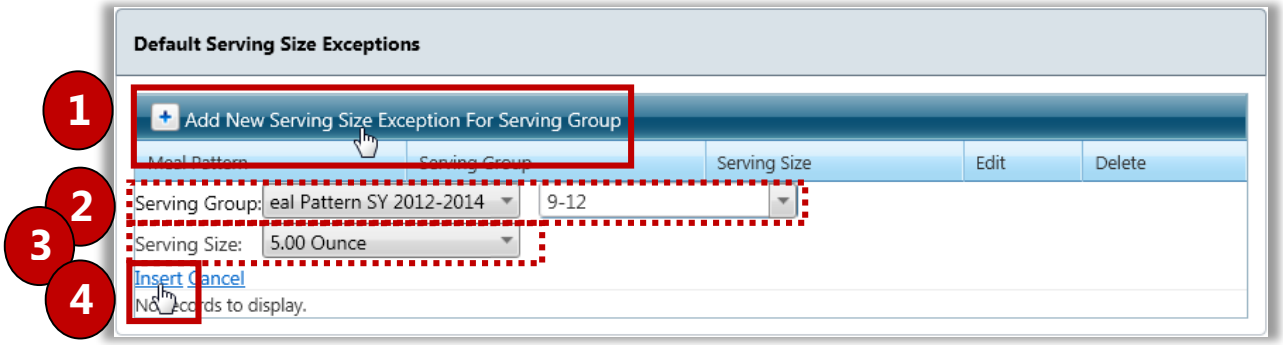
To add food component contributions:

1. Select a **Milk Type**, and enable juice and dessert options if appropriate.
2. Select contribution values for each food component provided by the Menu Item.
3. Click Save .



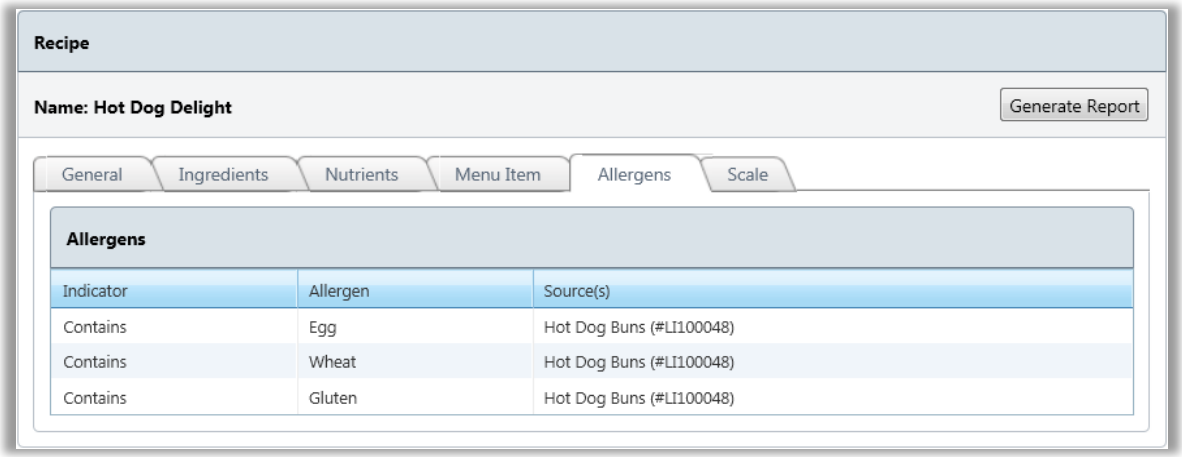
To add a serving size exception:

1. Click Add New Serving Size Exception For Serving Group .
2. Select a **Meal Pattern** and **Group** for **Serving Group**.
3. Select a **Serving Size**.
4. Click the **Insert** link.



Tab 5: Allergens

The **Allergens** tab reflects all allergens listed for each ingredient used in the recipe. This information is read-only. To change allergen information, you must update the **Allergens** tab for individual ingredients.

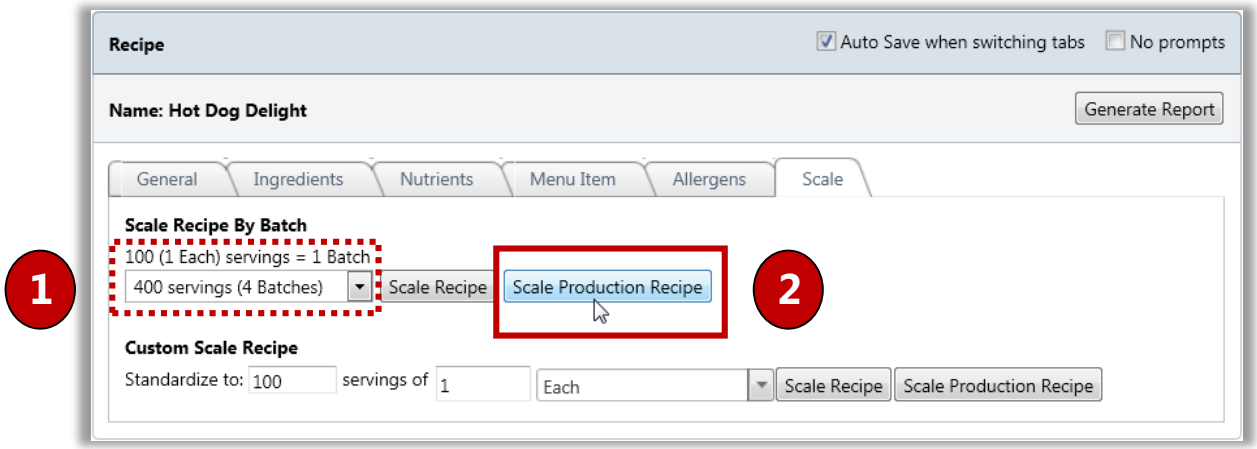


Tab 6: Scale

Recipes can be scaled by number of batches or by servings. The Scale Recipe by Batch report lists recipe details, stock item/ingredient details, instructions, HACCP processes and nutritional information. Scale Recipe by Servings report lists stock item/ingredient details, pre-prep and serving instructions, and HACCP processes.

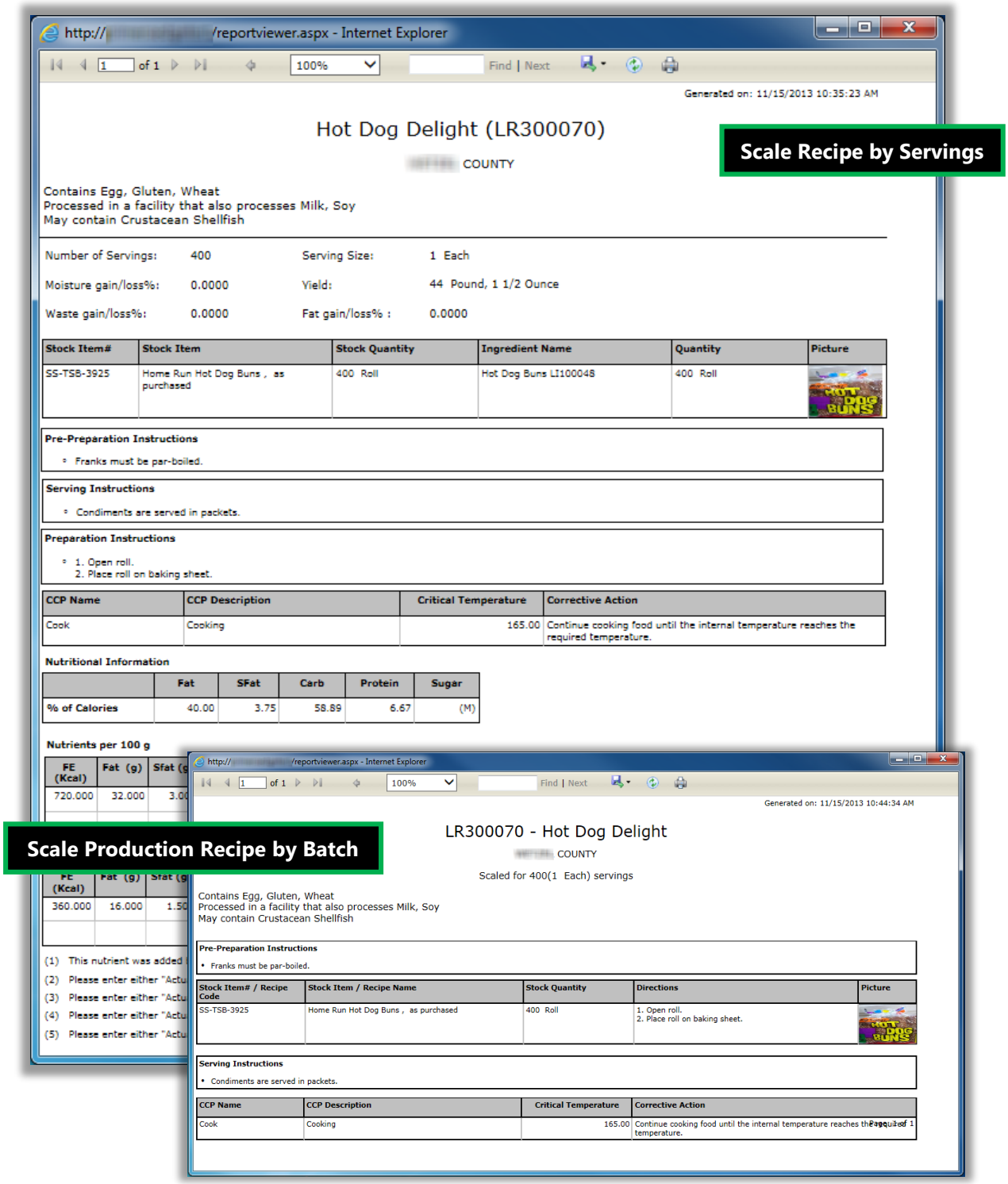
To scale a Production recipe by Batch:

1. Select the number of batches.
2. Click Scale Production Recipe .



To scale a recipe by servings

1. Enter number of servings and select the serving measure in **Standardize to:**
2. Click Scale Recipe .



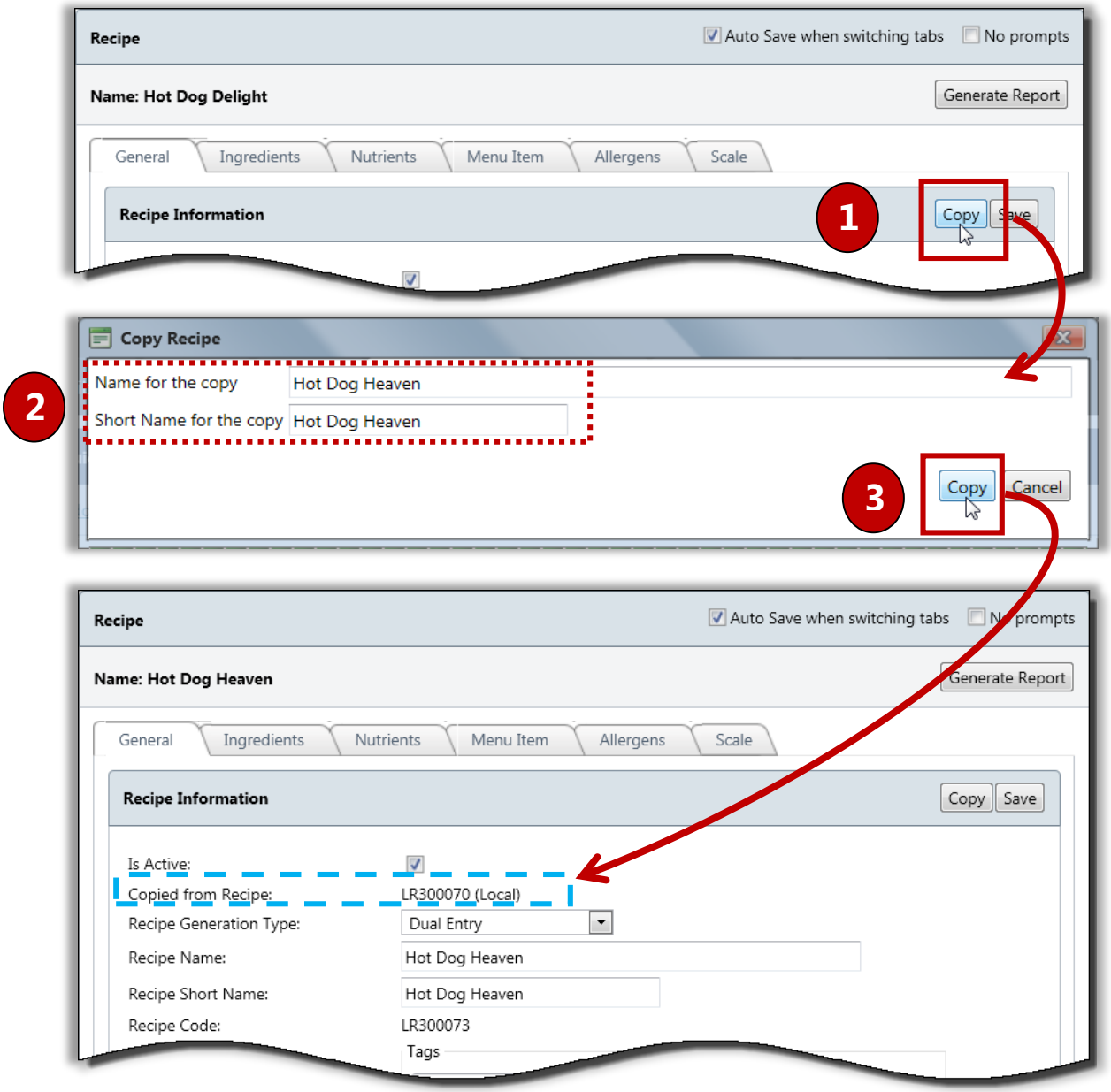
Copying a Recipe

Recipes can be copied as often as needed. This is convenient when you have similar recipes that include "tweaks". Copying the recipe and then making changes where needed is much faster than re-entering the entire recipe.

The copied recipe includes all data from the original recipe ***except*** for the **Menu Item** tab.

To copy a recipe:

1. Display the **General** tab.
2. Click Copy .
3. Enter a name and a short name for the copy and click Copy .

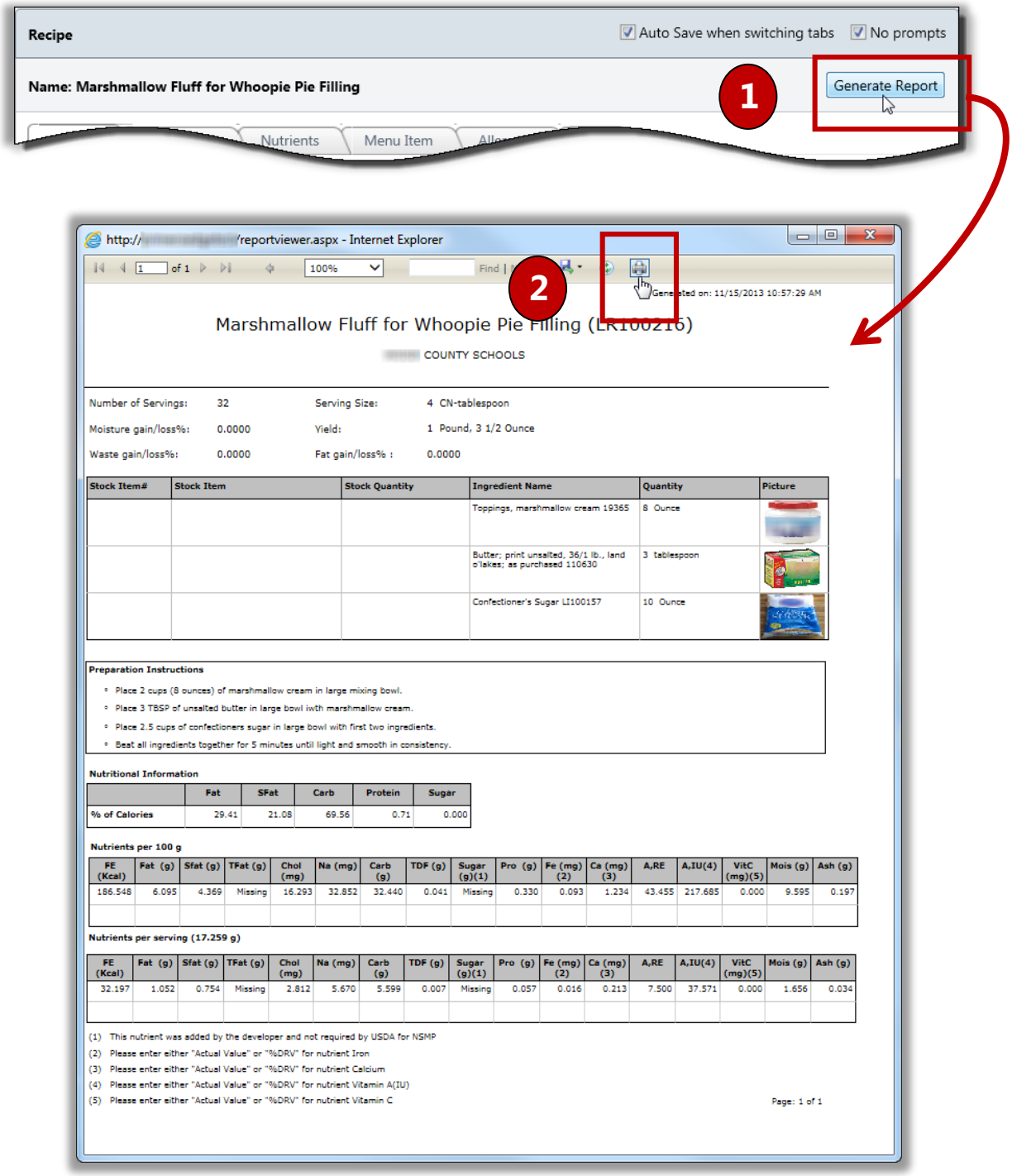


Generating a Recipe Report

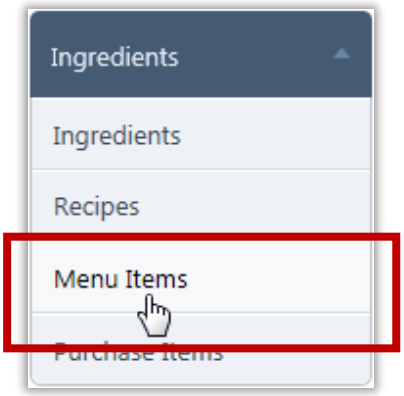
To generate and print a recipe report

1. Click Generate Report in the **Recipe** header.

2. Click **Print** ( ) on the window toolbar.



Menu Items



Menu Items searches for menu items by menu item Name (Full Name and Short Name), Category, Ingredient Code, and/or Recipe Code and tags.

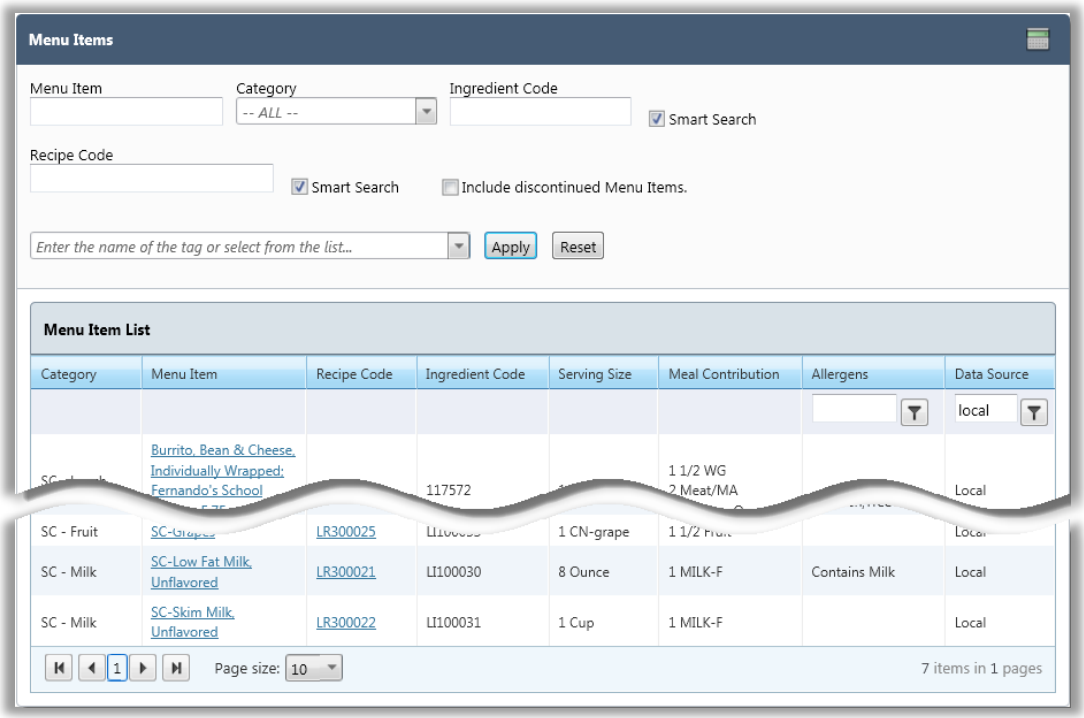
Ingredient Code and Recipe Code searches build a smart list of items that match the search string(s) as you enter them.

When search results are listed, the **General** tab or **Menu Item** tab of the **Recipe** page can be accessed through the links provided from a menu item listing.

Menu Item particulars

- Menu Items can be made inactive (discontinued).
- To include inactive Menu Items in search results, the **Include Discontinued Menu Items** option must be selected.
- An active Menu Item can include inactive Ingredients.
- An inactive Menu Item can be added to a Menu.

Menu Items Page



By default on the **Menu Items** page:

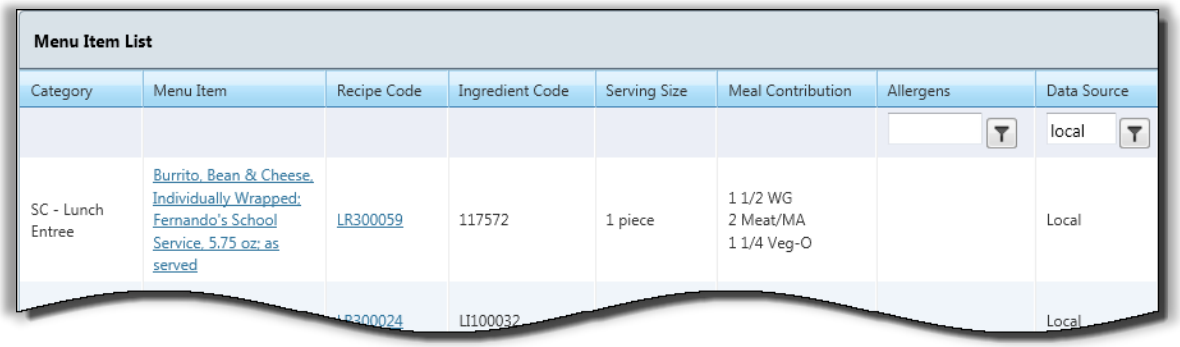
- **Category** is set to "ALL".

- **Menu Item**, **Ingredient Code**, **Recipe Code** and [**Tags**] are blank.
- **Ingredient Code Smart Search** and **Recipe Smart Search** are selected.
- **Include Discontinued Menu Items** is cleared.
- All ***active*** menu items are displayed in the **Menu Item List**.

Page Functions

Button/Link	Description
Apply	Click to display all Menu Item records in the **Menu Item List** that match the set search conditions.
Reset	Click to return all search criteria fields to the default settings.

Menu Item List Listings



Menu Item List

Category	Menu Item	Recipe Code	Ingredient Code	Serving Size	Meal Contribution	Allergens	Data Source
							local
SC - Lunch Entree	Burrito, Bean & Cheese, Individually Wrapped: Fernando's School Service, 5.75 oz; as served	LR300059	117572	1 piece	1 1/2 WG 2 Meat/MA 1 1/4 Veg-O		Local
		LR300024	LI100032				Local

Column Header	Data Type	Description
Category	*View only*	*Sortable;* category to which the menu item is assigned
Menu Item	Clickable link	*Sortable;* click to display the **Menu Item** tab of the recipe that the menu item is associated with
Recipe Code	Clickable link	*Sortable;* click to display the **General** tab of the recipe that the menu item is associated with
Ingredient Code	*View only*	*Sortable;* single-ingredient recipe code
Serving Size	*View only*	Lists the preferred serving size and measurement for the Menu Item
Meal Contributions	*View only*	Lists all food components contributed by the Menu Item to a meal
Allergens	*View only*	*Sortable;* all allergens associated with the menu item
Data Source	*View only*	*Sortable;* data location (database) of recipe associated with the menu item

Searching for a Menu Item

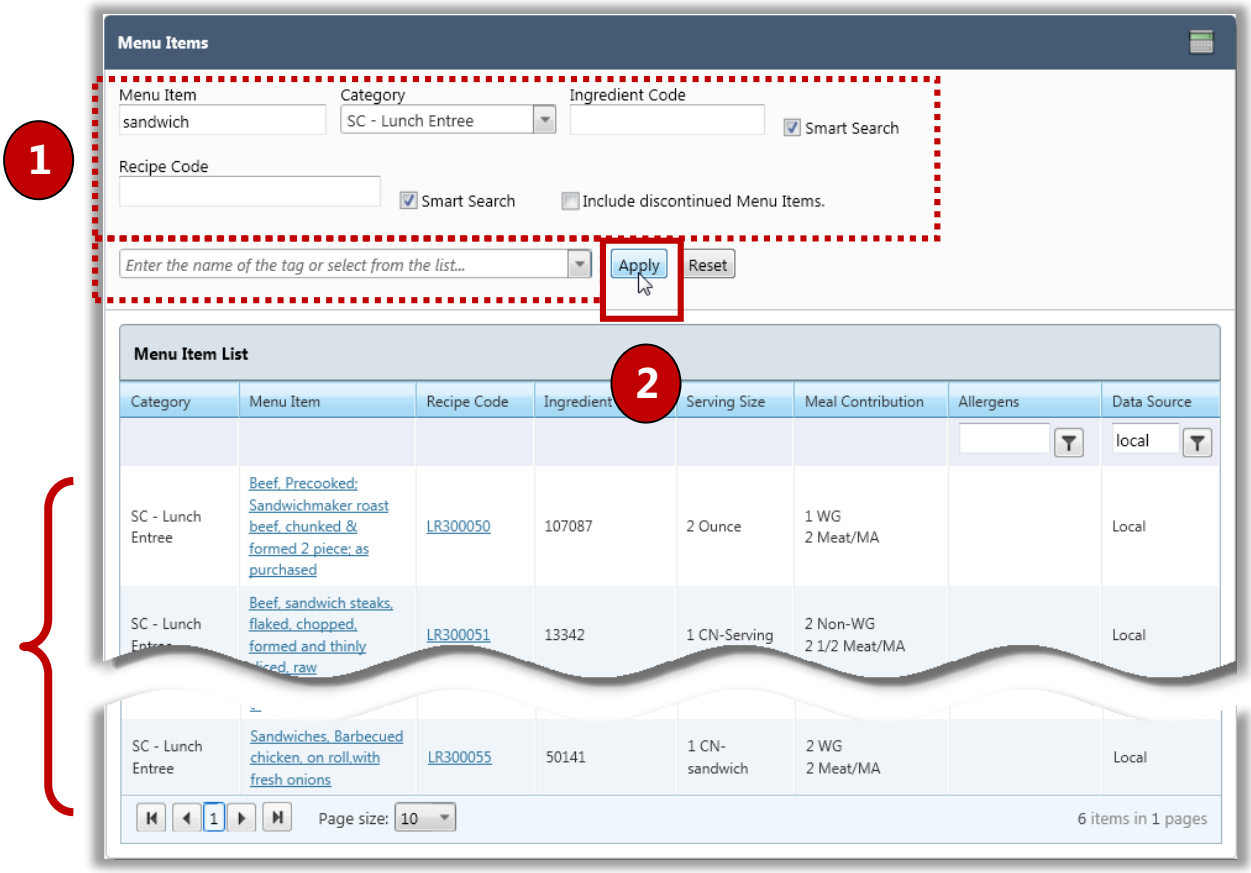
A search for a Menu Item can include five different search criteria. In addition, **Ingredient Code** and **Recipe Code** can be set to use Smart Search or Exact Search methods. Clearing the **Smart Search** option sets the search method to Exact Search.

- **Exact Match** – make only an exact match with the entered text or selected conditions; no variations of text strings will be matched, i.e., applying an Exact Match for "bagel" will not match records with the strings "bagels", "bagel half", "sliced bagel", etc.
- **Smart Search** – make matches with any string that includes the entered string; any variation will be matched, i.e., applying a Smart Search for "bagel" will match records with the strings "bagels", "bagel half", "sliced bagel", etc.

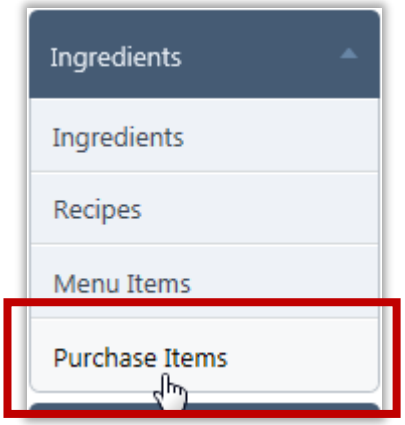
By default, all ***active*** Menu Items that meet the search criteria are listed in the search results. To include inactive Menu Items, enable the **Include discontinued Menu Items** option (add check mark).

To search for a Menu Item:

1. Enter one or more search criteria.
2. Click Apply .



Purchase Items

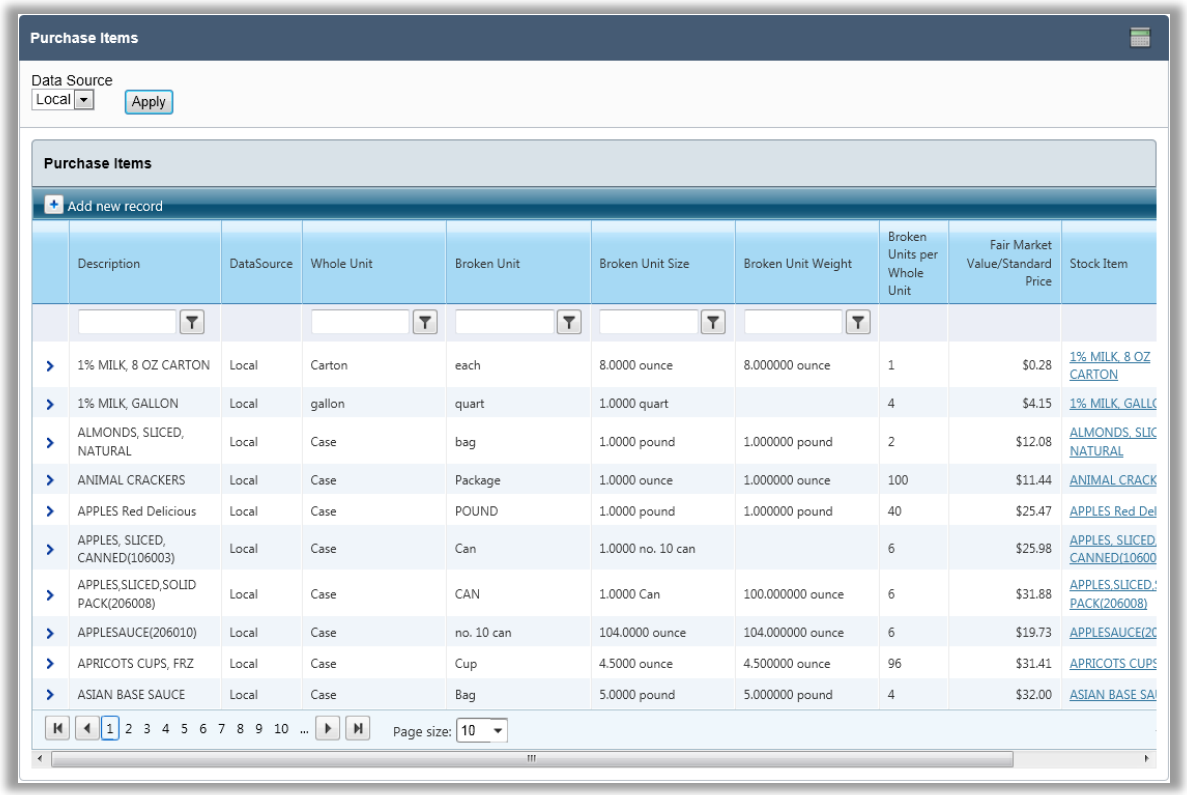


Purchase Items are automatically populated with Inventory items, if your district is using the **[Inventory]** module.

When the **[Inventory]** module is used in conjunction with the **[Menu Planning]** module, a Purchase Item can be linked to an Inventory item to support ordering of Recipe ingredients through a common purchasing system.

When the **[Inventory]** module is not used, Purchase Items are added manually and provide recipe costing information through input of "Fair Market Value/Standard Price" for each item.

Purchase Items Page



Description	DataSource	Whole Unit	Broken Unit	Broken Unit Size	Broken Unit Weight	Broken Units per Whole Unit	Fair Market Value/Standard Price	Stock Item
1% MILK, 8 OZ CARTON	Local	Carton	each	8.0000 ounce	8.000000 ounce	1	$0.28	1% MILK, 8 OZ CARTON
1% MILK, GALLON	Local	gallon	quart	1.0000 quart		4	$4.15	1% MILK, GALL(
ALMONDS, SLICED, NATURAL	Local	Case	bag	1.0000 pound	1.000000 pound	2	$12.08	ALMONDS, SLIC NATURAL
ANIMAL CRACKERS	Local	Case	Package	1.0000 ounce	1.000000 ounce	100	$11.44	ANIMAL CRACK
APPLES Red Delicious	Local	Case	POUND	1.0000 pound	1.000000 pound	40	$25.47	APPLES Red Del
APPLES, SLICED, CANNED(106003)	Local	Case	Can	1.0000 no. 10 can		6	$25.98	APPLES, SLICED, CANNED(10600
APPLES,SLICED,SOLID PACK(206008)	Local	Case	CAN	1.0000 Can	100.000000 ounce	6	$31.88	APPLES,SLICED,: PACK(206008)
APPLESAUCE(206010)	Local	Case	no. 10 can	104.0000 ounce	104.000000 ounce	6	$19.73	APPLESAUCE(2(
APRICOTS CUPS, FRZ	Local	Case	Cup	4.5000 ounce	4.500000 ounce	96	$31.41	APRICOTS CUPS
ASIAN BASE SAUCE	Local	Case	Bag	5.0000 pound	5.000000 pound	4	$32.00	ASIAN BASE SA(

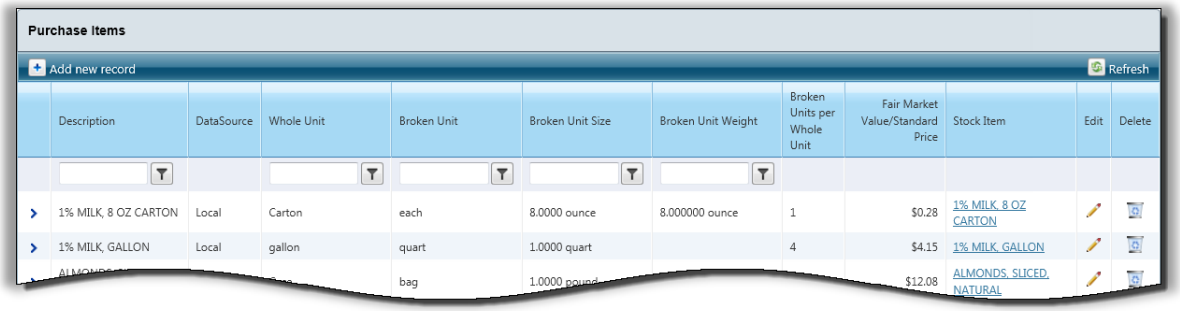
By default on the **Purchase Items** page:

- **Data Source** is set to "local".

Page Functions

Button/Link	Description
Apply	Click to display all recipe records in the **Recipe List** that match the set search conditions.

Purchase Items Listings



Header Name	Data Type	Description
Description	View only	*Sortable*; ingredient short description
Data Source	View only	Data location (database) of purchase item
Whole Unit	View only	Description of a purchasable unit sold as "one"
Broken Unit	View only	Description of the individual units that make up a whole unit
Broken Unit Size	View only	Quantity of an individual unit
Broken Unit Weight	View ony	Weight of an individual unit
Broken Units per Whole Unit	View only	Total number of individual units that make up a whole unit
Fair Market Value/ Standard Price	View only	Price of one whole unit of the purchase item that an interested buyer would be willing to pay
Stock Item	Clickable link	Click to either link the purchase item to a stock item in inventory or to change the linked stock item.
Edit	Clickable icon ( )	Click to change the purchase item details. **Note**: Icon is available only for ***local*** items.
Delete	Clickable link ( )	Click to remove the purchase item listing. **Note:** Icon is available only for ***local*** items.

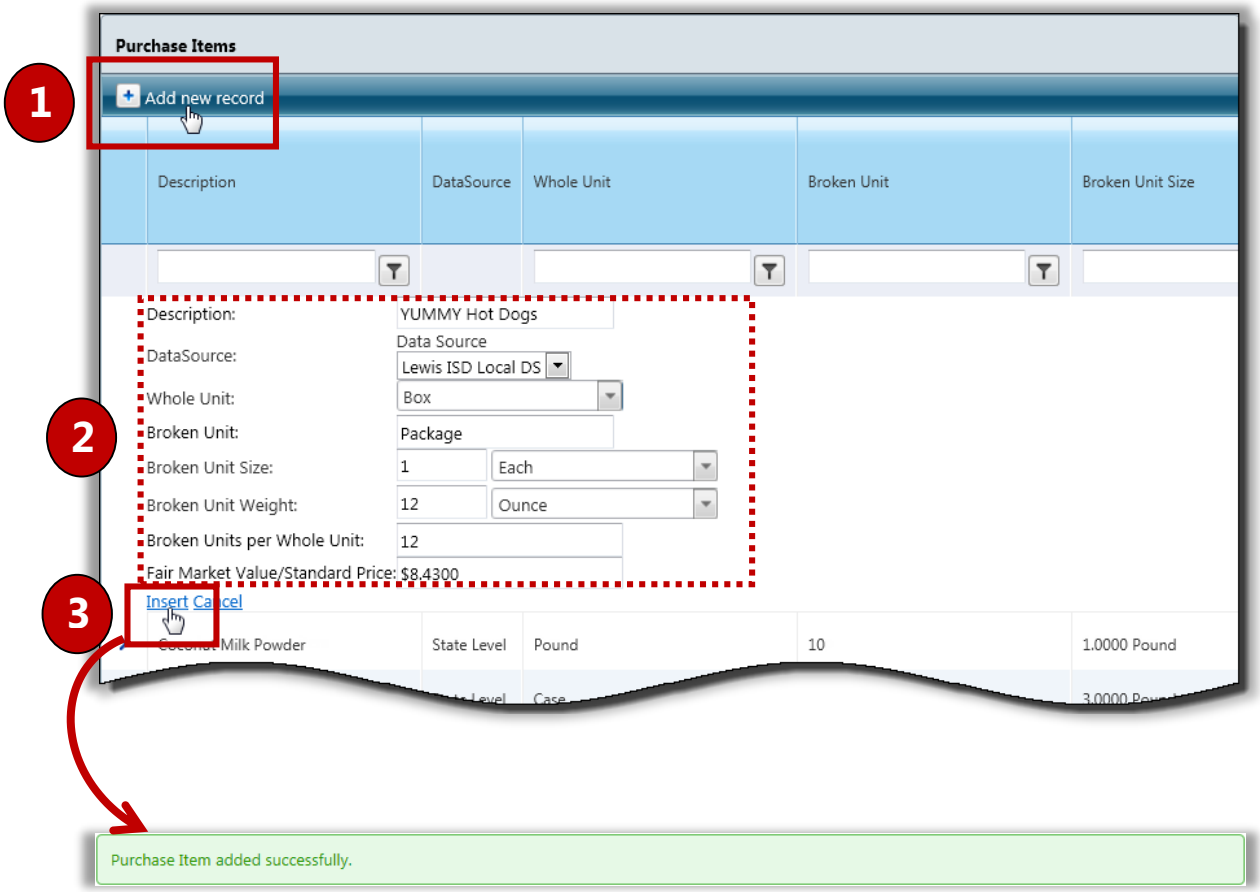
Adding a New Purchase Item

Purchase Items are added manually in installations that do not use the PrimeroEdge **[Inventory]** module.

To add a new Purchase Item:

1. Click

.
2. Enter Purchase Item details.
3. Click the **Insert** link.

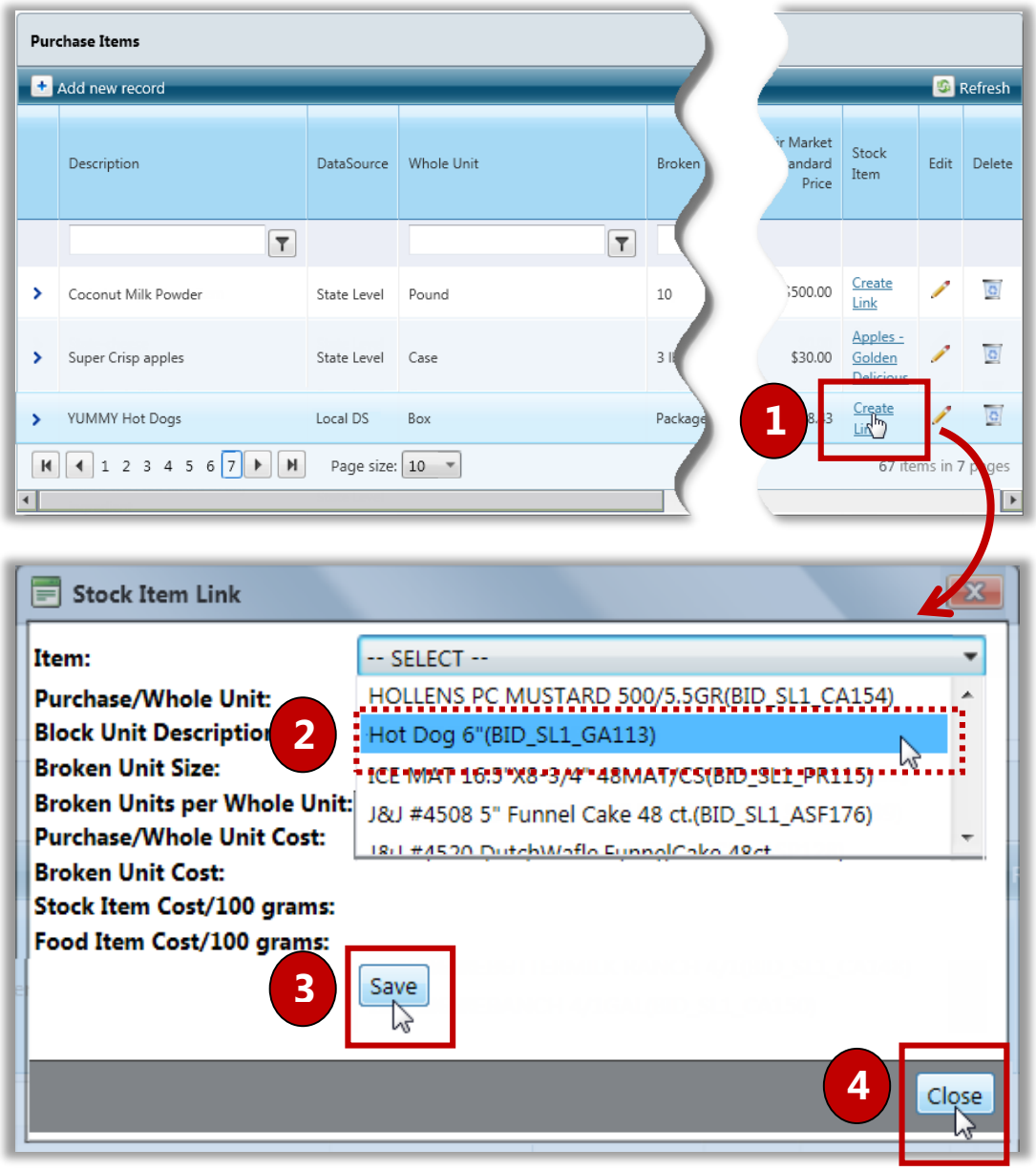


Creating a Link to a Stock Item

If your district uses the PrimeroEdge **[Inventory]** module, you will link a Purchase Item to an Inventory stock item. The linked stock item name then appears in the **Stock Item** column.

To create a Purchase Item link:

1. Click the **Create Link** link in the **Purchase Items** listing.
2. Select the stock item.
3. Click Save .
4. Click Close .



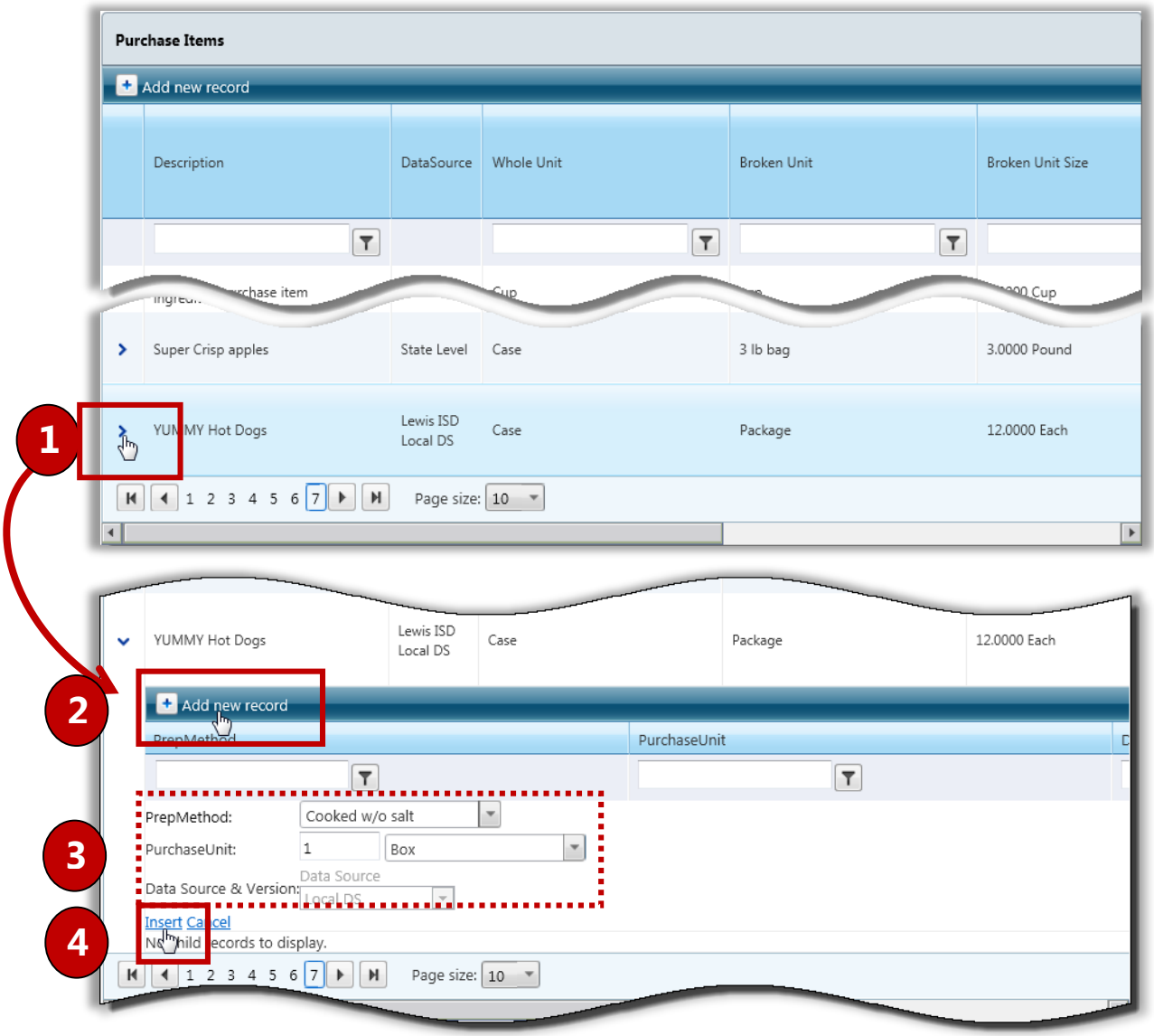
Adding an Ingredient Form to a Purchase Item

The same ingredient may be purchased in different forms (preparation methods). Multiple Ingredient forms can be included in a Purchase Item record.

To add an Ingredient form to a Purchase Item:

1. Expand a purchase item listing.
2. Click

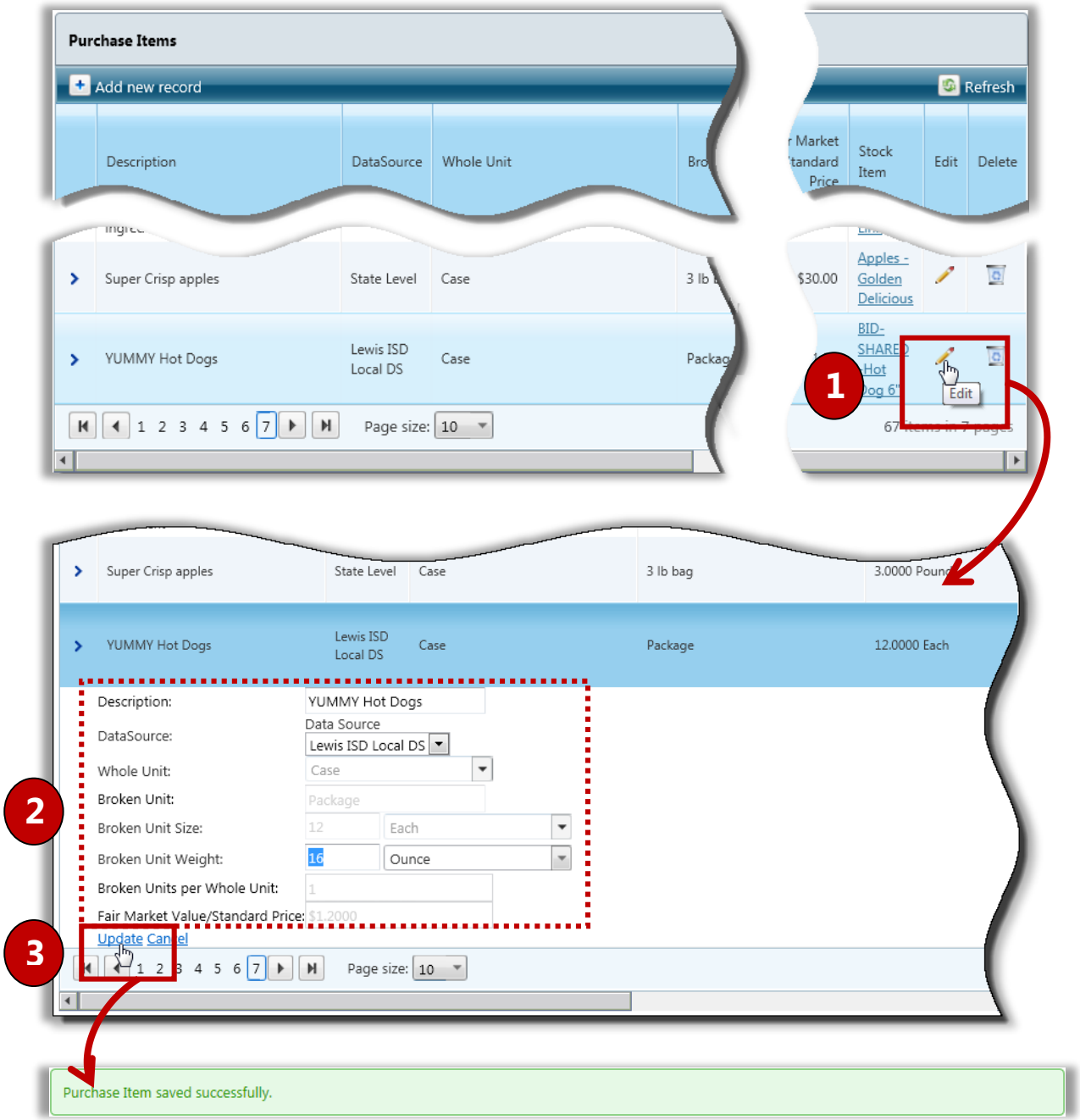
.
3. Select form details.
4. Click the **Insert** link.



Updating Purchase Item Details

To update Purchase Item details:

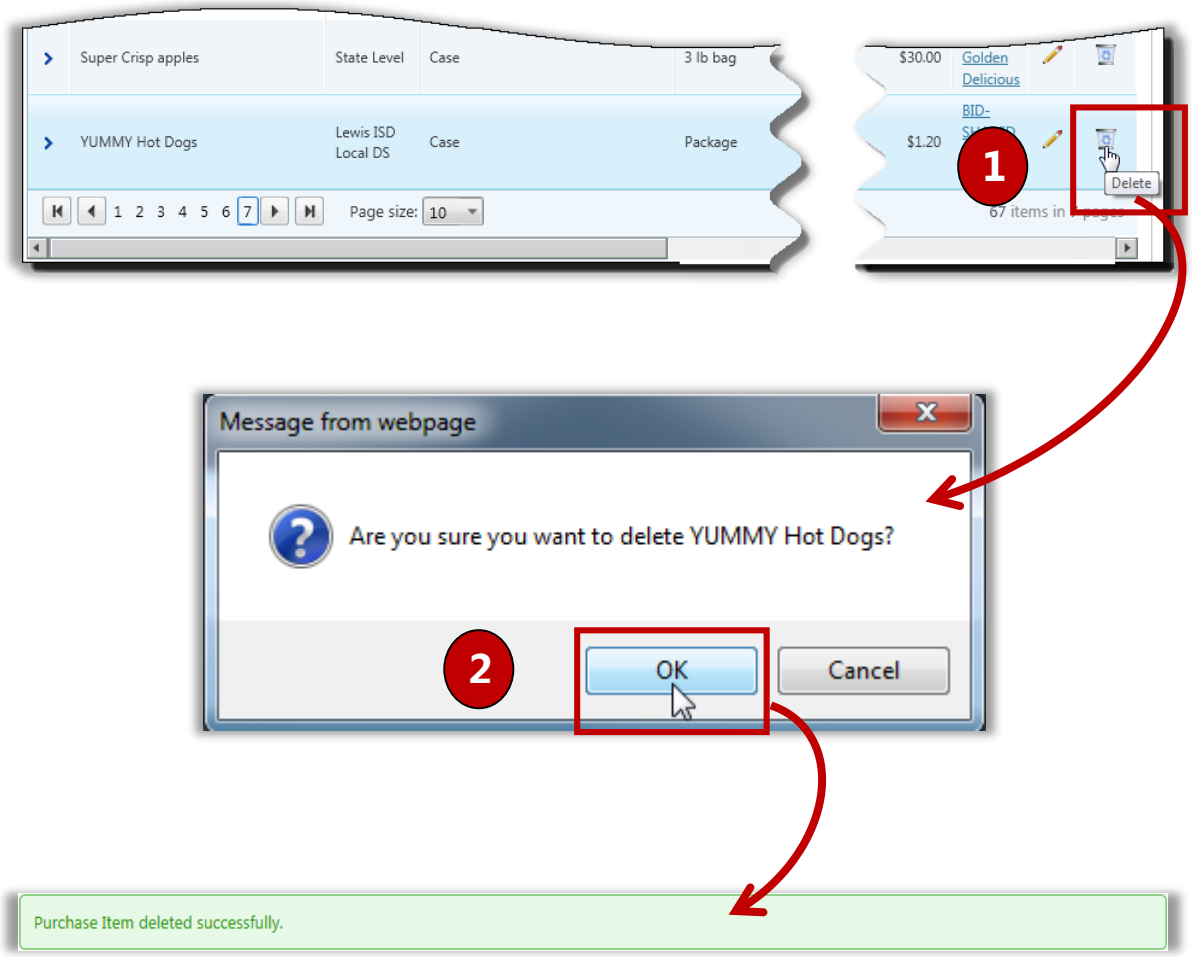
1. Click **Edit** ( ) in a Purchase Item listing.
2. Change Purchase Item details, as needed.
3. Click the **Update** link.



Deleting a Purchase Item

To delete a Purchase Item

1. Click **Delete** ( ) in a Purchase Item listing.
2. Click OK in the confirmation message.



End of Section

3 Menus

In this chapter you will learn:

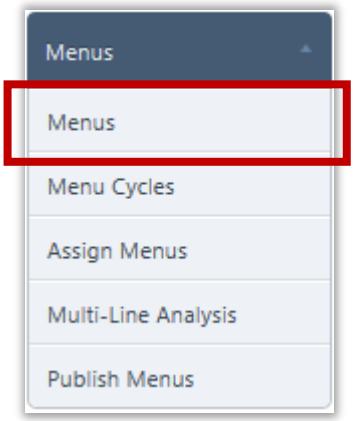
- ✓ Add a Menu.
- ✓ Add or remove Menu Items on a Menu.
- ✓ Change Menu information and details.
- ✓ View Menu nutrients and nutrition facts.
- ✓ Create a Menu Cycle.
- ✓ Change Menus in a Menu Cycle.
- ✓ Change Menu Cycle information and details.
- ✓ Assign a Menu or a Menu Cycle to a calendar date or range of dates.
- ✓ Change or remove Menus or Menu Cycles assigned to a calendar date or date range.

Menus at a Glance

Menu Function	Description
Menus	Create and change menus and menu contents.
Menu Cycles	Create and maintain a set of menus selected for a specified number of days and weeks (cycle).
Assign Menus	Assign and change menus assigned to a calendar date or range of dates for selected schools.
Multi-Line Analysis	Analyze Menu Lines in Menu Cycles to determine if required Nutrient and Food Component values have been met.
Publish Menus	Publish menus to the ParentOnline web site for review by ParentOnline patrons.

Note: Menus and functions to which you have access are those that are appropriate for your role within PrimeroEdge. When you access the **Menus** menu, you may see a subset of the functions listed above.

Menus



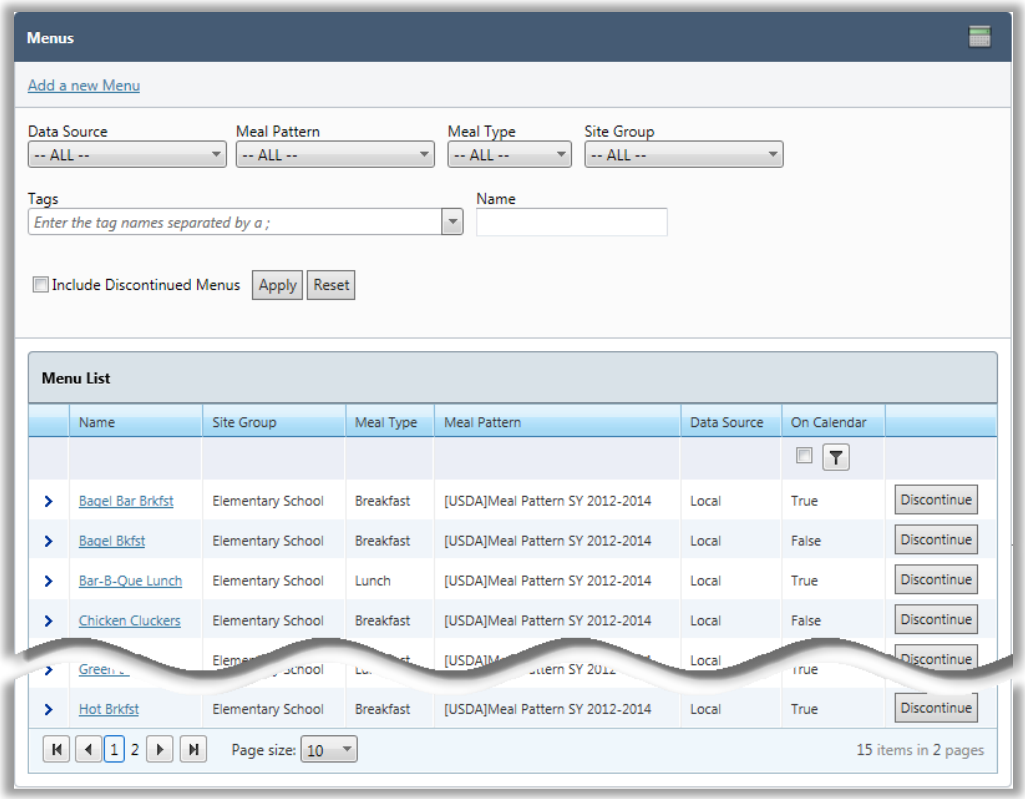
Menus allows you to create menus and menu templates with one or more menu items. Nutrients and nutrition facts can be displayed for a menu.

Menu selections can be updated as needed by choosing different menu item categories, analysis method and USDA groups.

Menu particulars

- Menus can be made inactive (discontinued).
- Menus can include Menu Items with inactive ingredients.
- Inactive Menu Items cannot be added to a Menu.
- An inactive Menu can be copied; copy is active by default.
- To include inactive Menus in search results, the **Include Discontinued Menus** option must be selected.

Menus Page



By default on the **Menus** page:

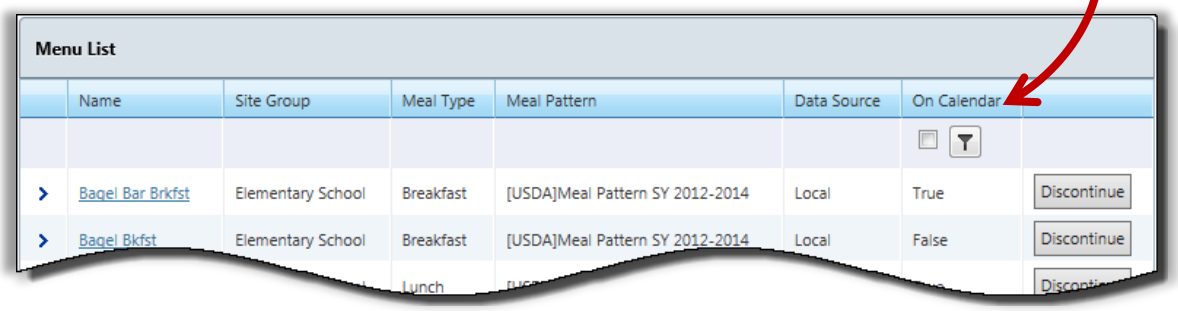
- **Data Source**, **Meal Pattern**, **Meal Type**, and **Site Group** are set to "ALL".
- **Tags** and **Name** are blank.
- **Include Discontinued Menus** option is cleared.

Page Functions

Button/Link	Description
Apply	Click to display all recipe records in the **Recipe List** that match the set search conditions.
Reset	Click to return all search criteria fields to the default settings.

Menu List Listings

Click to display only those menus that appear on a menu calendar (True)



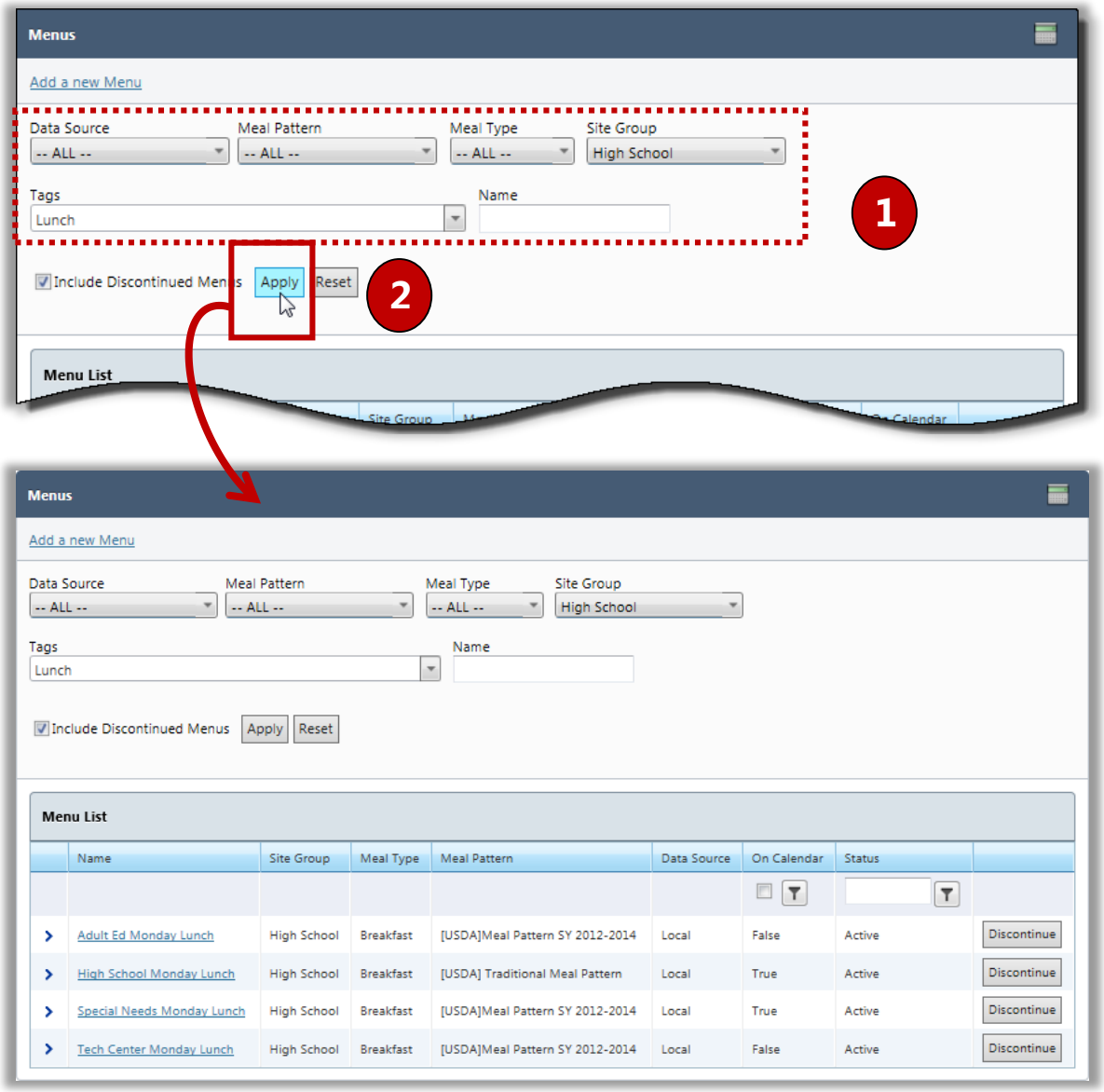
Header Name	Data Type	Description
Name	View only	Menu name
Site Group	View only	*Sortable*; Site Group to which the menu is assigned
Meal Type	View only	*Sortable*; Meal Type on which the menu is based
Meal Pattern	View only	*Sortable*; Meal Pattern on which the menu is based
Data Source	View only	*Sortable*; Collection of which the Menu in a member
On Calendar	View only	*Sortable*; Indicates if Menu appears on a menu calendar
(Active/ Inactive)	Clickable button	Click Discontinue to make menu inactive. Click Activate to make menu active.

Searching for a Menu

Six separate search conditions can be used to narrow your search for a Menu or group of menus. By default, active Menus are listed. To include discontinued (inactive) Menus, select the **Include Discontinued Menus** option.

To search for a Menu

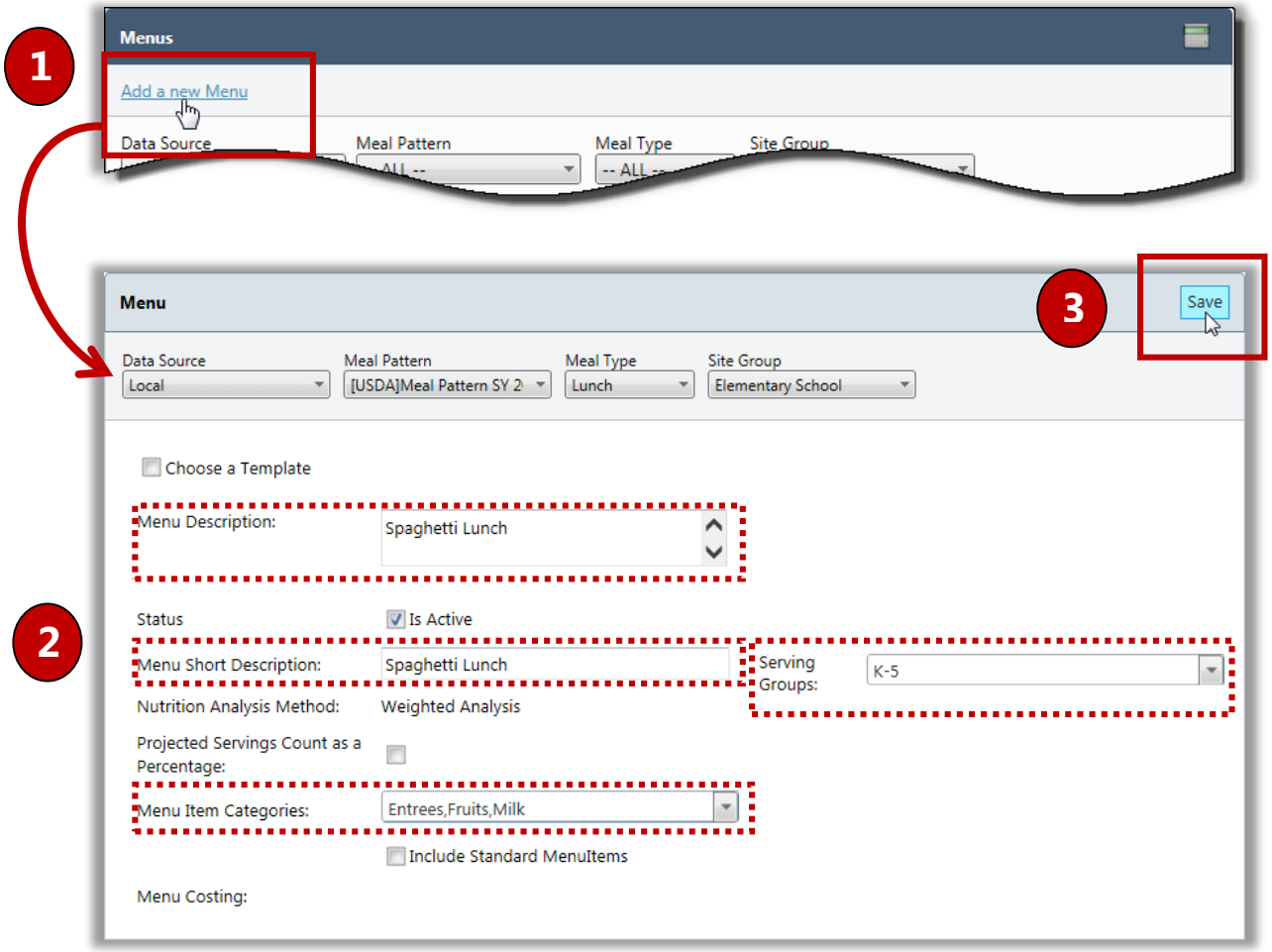
1. Select or enter one or more search conditions.
2. Click Apply .



Adding a Menu

To add a new Menu

1. Click the **Add a new Menu** link.
2. Enter and select menu details; when a menu template is not used, select Serving Groups with Projected Meal Counts and Menu Item Categories with number of Choices specified.
3. Click Save .



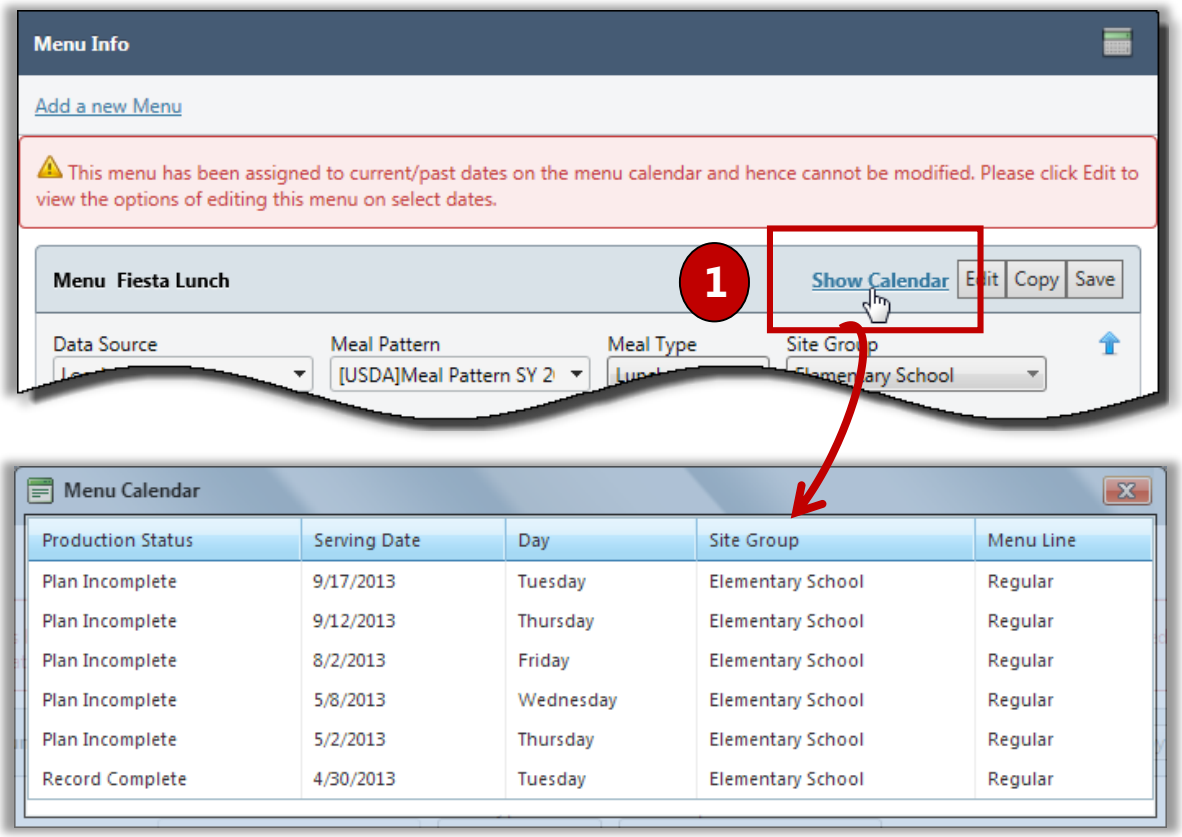
Editing a Menu

Completed Menus are assigned to dates on a Menu Calendar. Menus assigned to past dates cannot be changed. Therefore, if you choose to edit a Menu that is assigned to past dates and also to future dates, a copy of the Menu is made as part of the editing process and you will choose the future dates to which the copied Menu is to be applied.

Before editing a Menu, you can display a list of all dates to which the Menu has been or is currently assigned.

To display a list of Menu Calendar assignments for a Menu

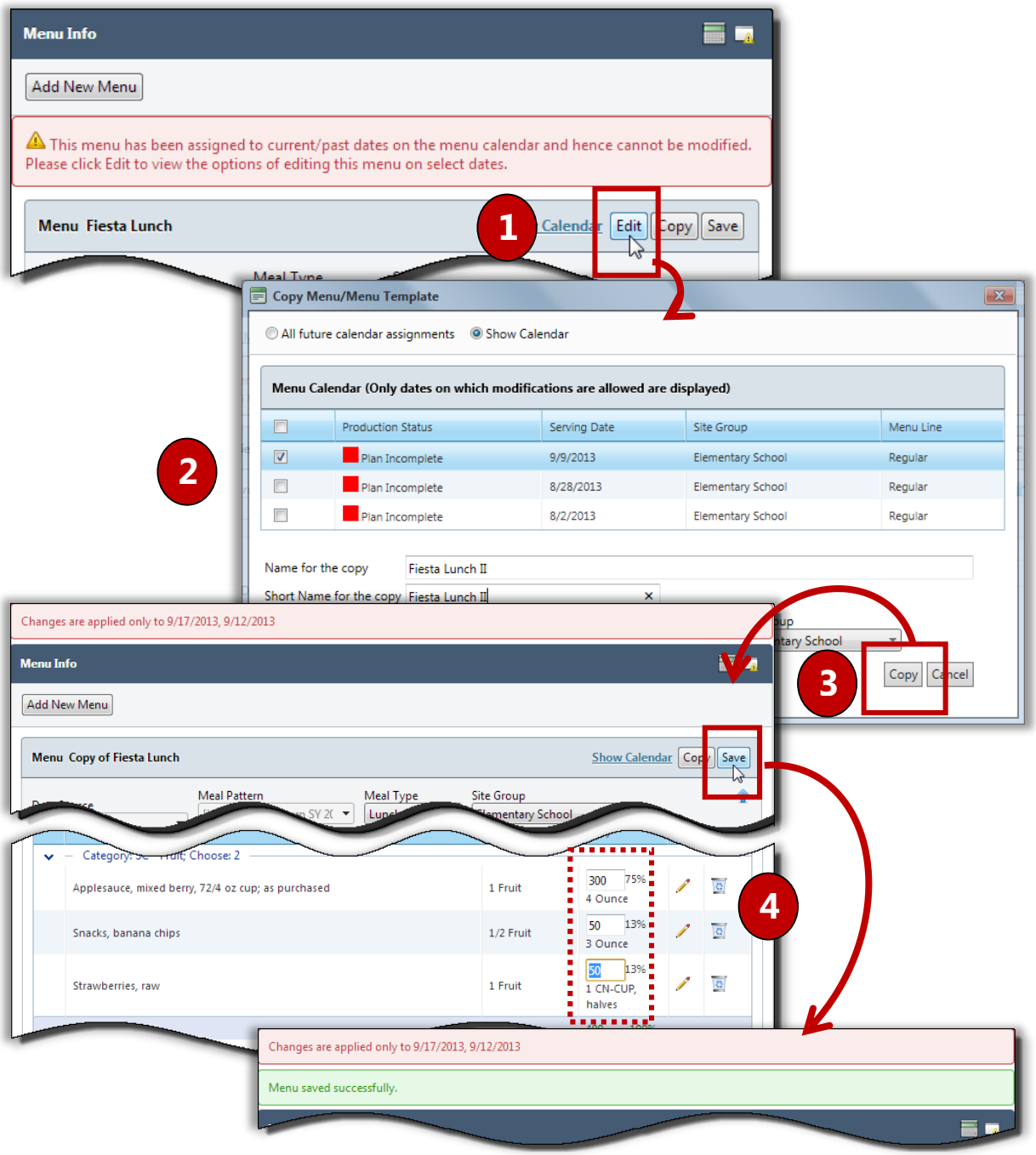
- Display a menu and click the **Show Calendar** link.



If today is July 22, 2013 (7/22/2013), you see that three of the six listed dates are in the future, i.e., can be changed. The three menus listed for April and May could not be modified.

To edit a Menu with Menu Calendar assignments

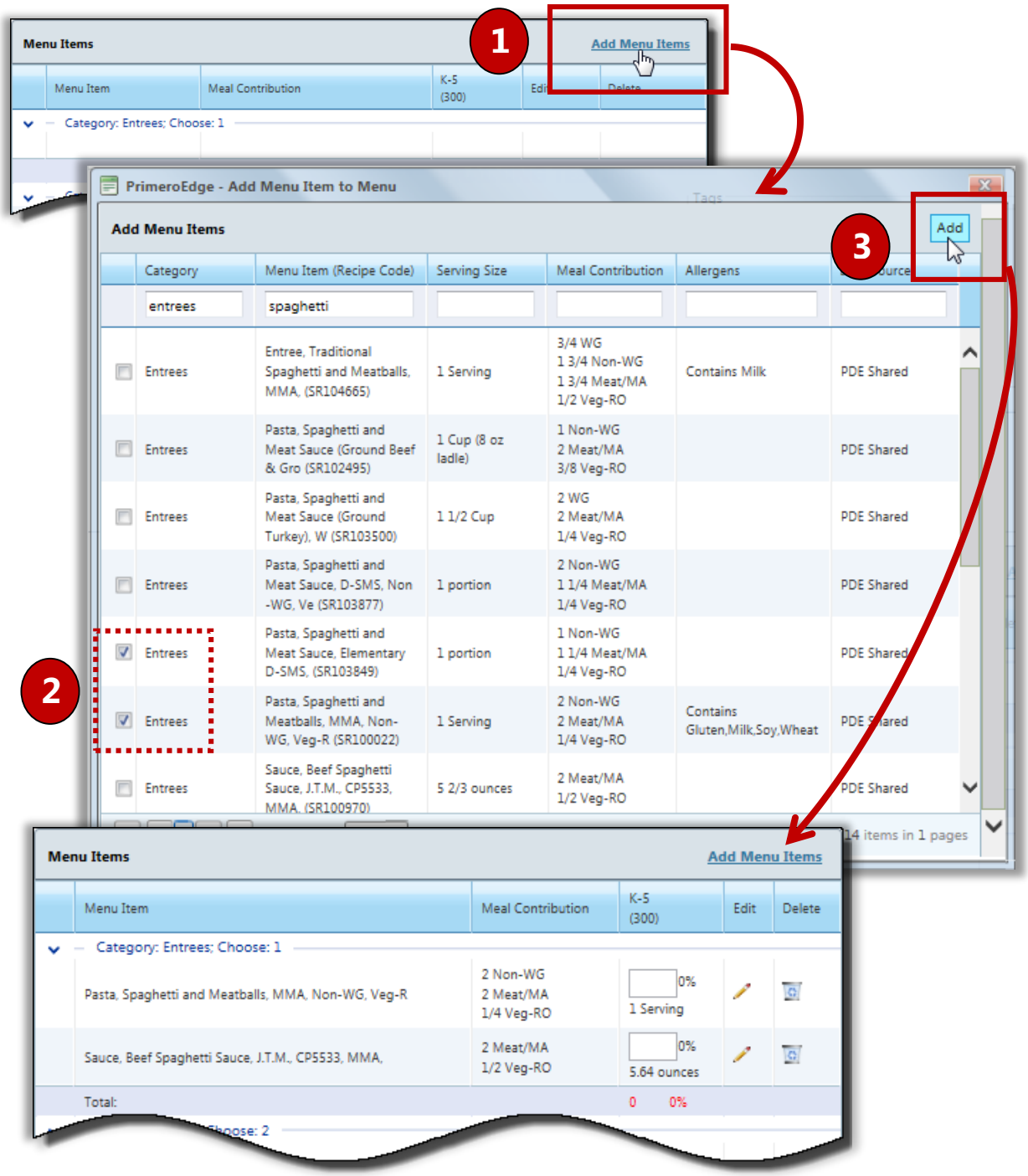
1. Display a Menu and click Edit .
2. Select the dates to modify on the Menu Calendar.
3. Click Copy .
4. Make changes to the Menu and click Save .



Adding a Menu Item to a Menu

To add a Menu Item

1. Click the **Add Menu Items** link on the Menu Info page.
2. Select one or more menu items.
3. Click Add .

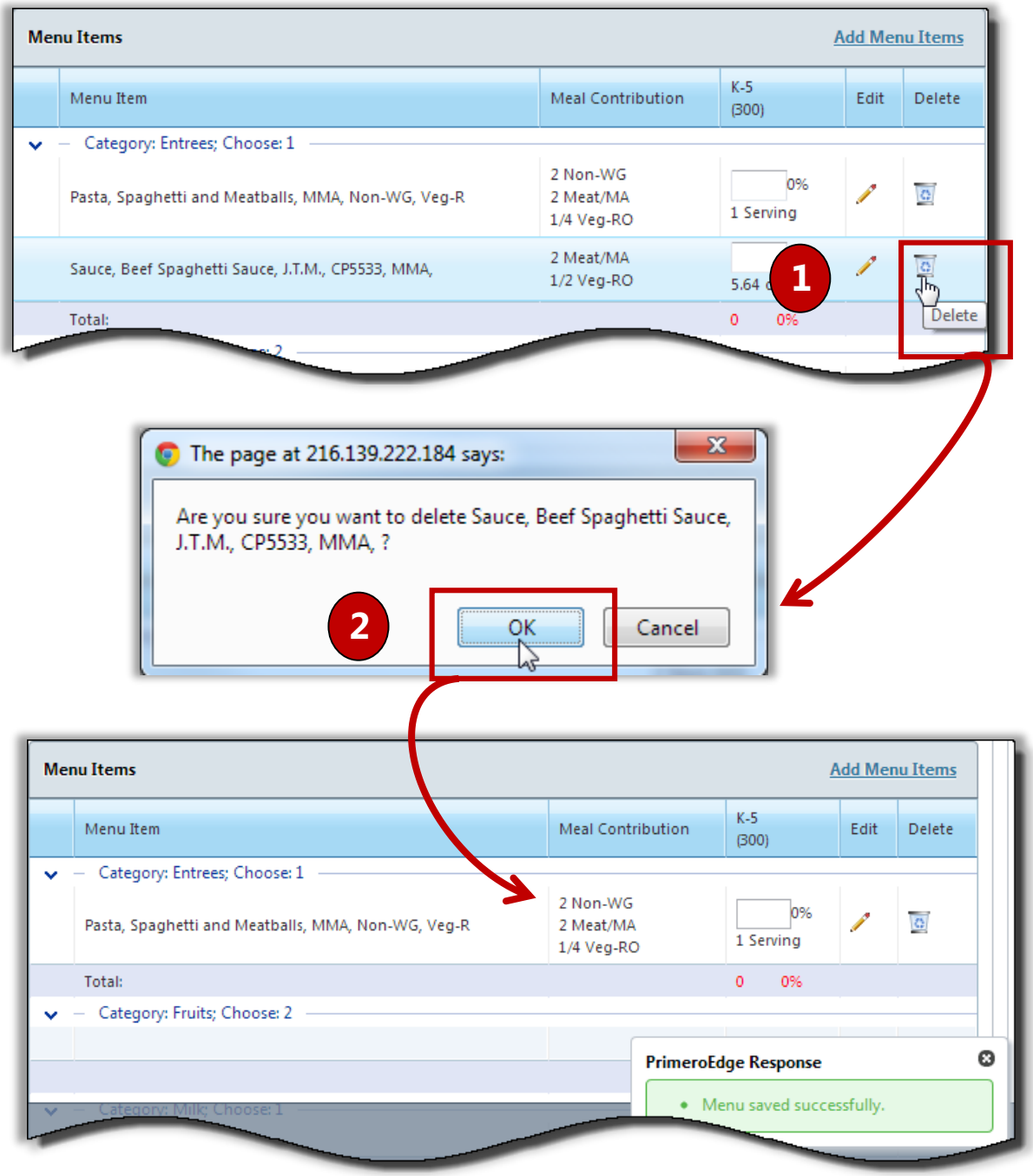


Deleting a Menu Item from a Menu

To delete a Menu Item

1. Click **Delete** ( ) in the menu item listing on the Menu Info page.

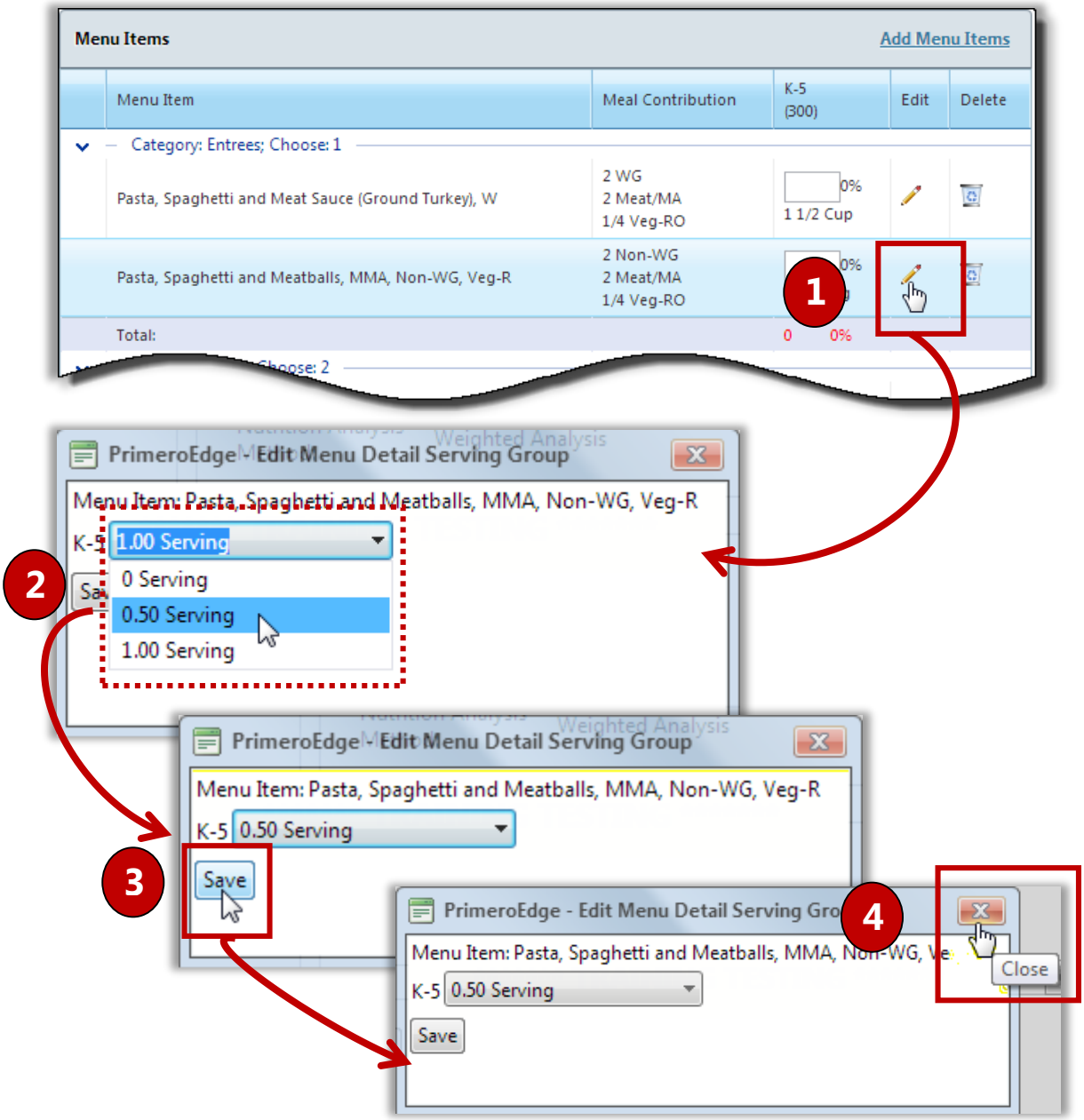
2. Click OK in the confirmation message.



Changing Menu Item Serving Size

To update Menu Item details

1. Click **Edit** ( ) in a menu item listing on the Menu Info page.
2. Select a new serving size.
3. Click Save .
4. Click **Close ( ).**

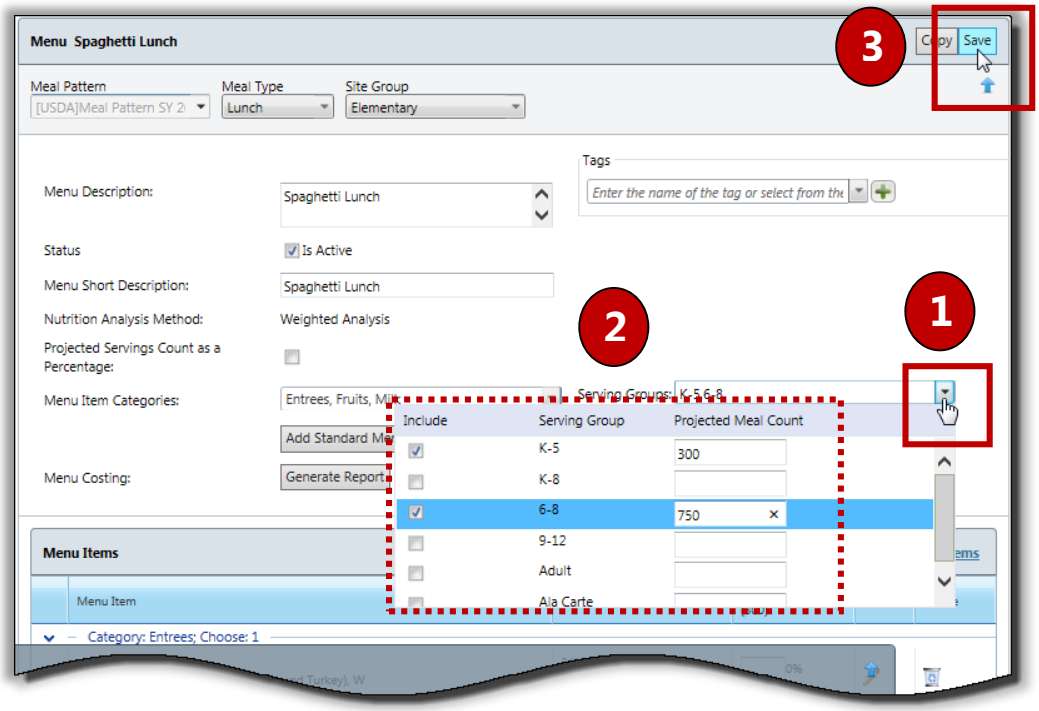


Changing Serving Groups for a Menu

Serving groups can be added or removed from a menu as well as the projected meal counts can be updated for each group when needed.

To update menu Serving Groups

1. Display a menu and click the **Serving Groups** button.
2. Select a new serving group to include and enter a projected meal count, or clear a group selection, or enter new projected meal counts for an existing serving group.
3. Click Save .

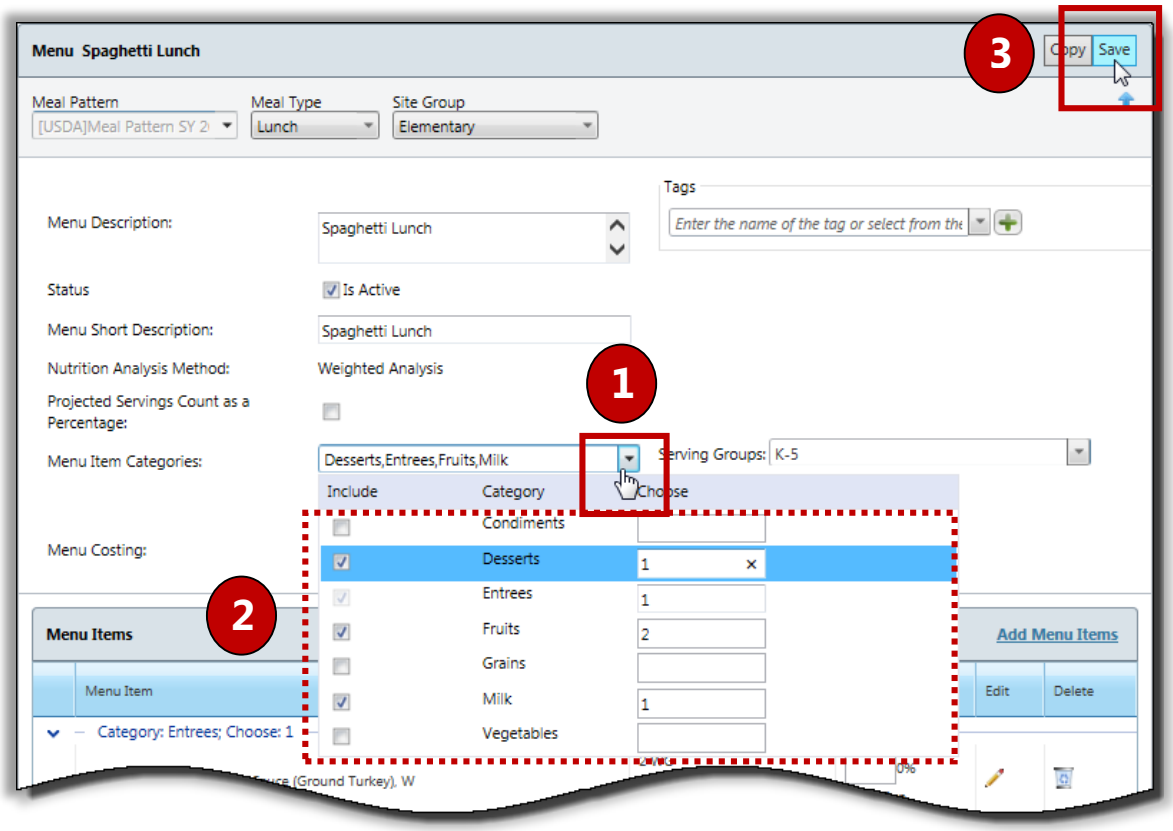


Changing Menu Item Category Assignments for a Menu

Menu Item Categories can be added or removed from a menu; choice counts can be updated for each category when needed.

To update menu Serving Groups

1. Display a menu and click the **Menu Item Categories** button.
2. Select a new category to include and enter the number of items the patron can choose from the category, or clear a category selection, or enter new choice counts for an existing category, when necessary.
3. Click Save .



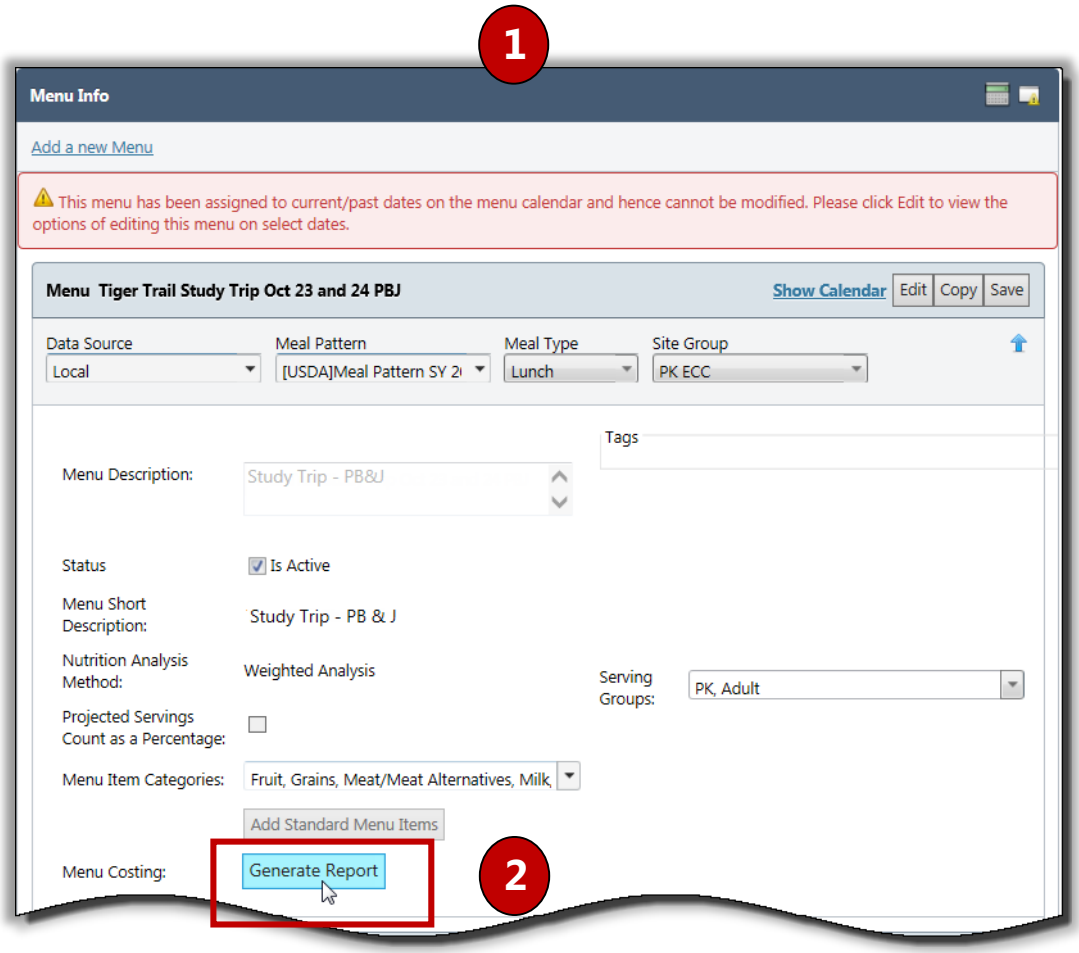
Generating a Menu Costing Report

The Menu Costing Report provides the cost of the materials to produce Menu Items on a Menu.

To generate a Menu Costing Report

1. Display a menu on the *Menu Info* page.

2. Click Generate Report to the right of the **Menu Costing** label.



http://freeandreduced.springbranchisd.com/Primero/reportviewer.aspx - Internet Explorer

1 of 1 Find | Next

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Study Trip PBJ

[USDA]Meal Pattern SY 2012-2014--PK ECC

Meal Type: Lunch

Total Meals: 200

Recipe Code	Description	Serving Size	Planned Qty	Unit Cost	Total Cost
Fruit					
LR-1378	Apples, All Varieties 2013	1 ea.	200	0.2210	44.20
Food Cost / Meal:				**0.22**	
Meat/Meat Alternatives					
LR14225	Peanut Butter & Jelly Sandwich 2013	1 ea.	200	0.3724	74.48
Food Cost / Meal:				**0.37**	
Milk					
LR-1367	Milk, 1% White, Paper 2013	1 ea.	10	0.2690	2.69
LR-1370	Milk, Nonfat, White Paper 2013	1 ea.	10	0.2690	2.69
LR-1365	Milk, Nonfat, Chocolate Paper 2013	1 ea.	160	0.2710	43.36
LR-1372	Milk, Whole, CC	1 ea.	20	0.2720	5.44
Food Cost / Meal:				**0.27**	
Other/Condiment					
LR-1290	Condiment, Ranch Dressing, PC	1 ea.	200	0.0478	9.55
Food Cost / Meal:				**0.05**	
Vegetables					
LR-1188	Baby Carrot Snack Pack 2013	3 oz.	10	0.1600	1.60
LR-1032	Sliced Cucumbers 2013	1/4 c.	5	0.0481	0.24
LR-1032	Sliced Cucumbers 2013	1/2 c.	5	0.0963	0.48
Food Cost / Meal:				**0.01**	
Grand Totals:				**0.92**	**184.73**

Page: 1 of 1

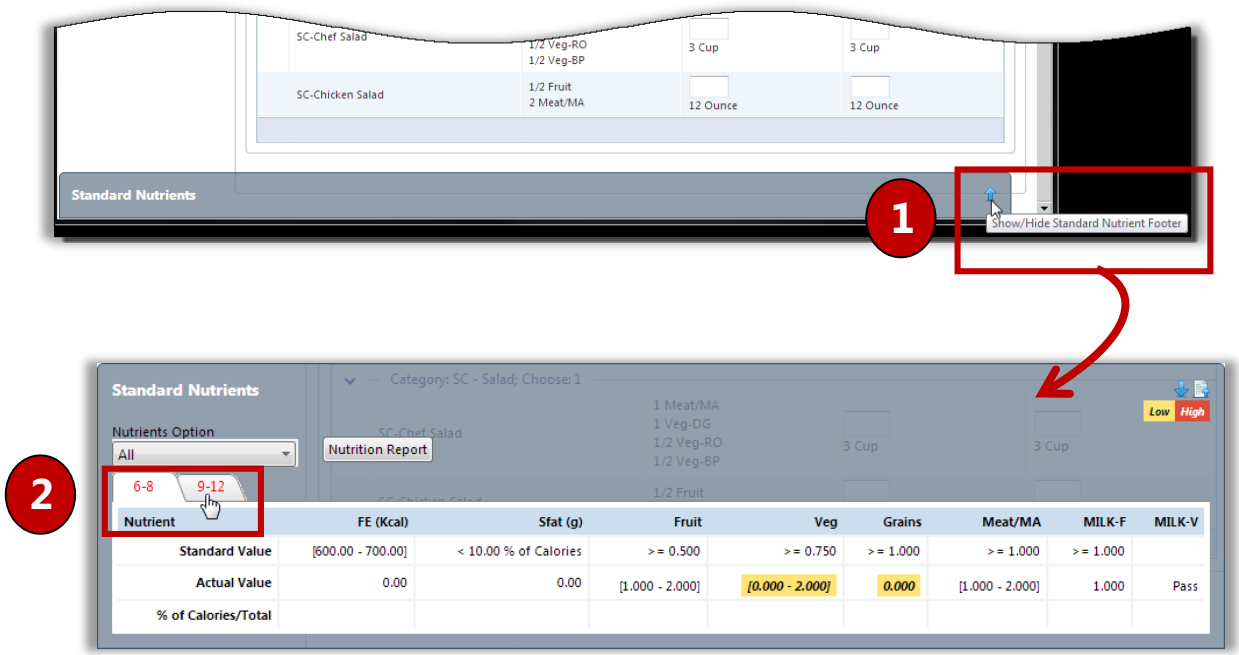
Viewing Menu Nutrients and Food Components

Each menu display includes a Standard Nutrients footer. This footer provides one tab of nutrition information for each serving group.

- Nutrient values that fall *below* the requirements for a food component are highlighted in **yellow**.
- Nutrient values that fall *above* the maximum nutritional requirements are highlighted in **red**.
- Fail message in the **Milk-V** column indicates that the requirement for providing at least two choices (a "variety" of milks) in a meal service has not been met.

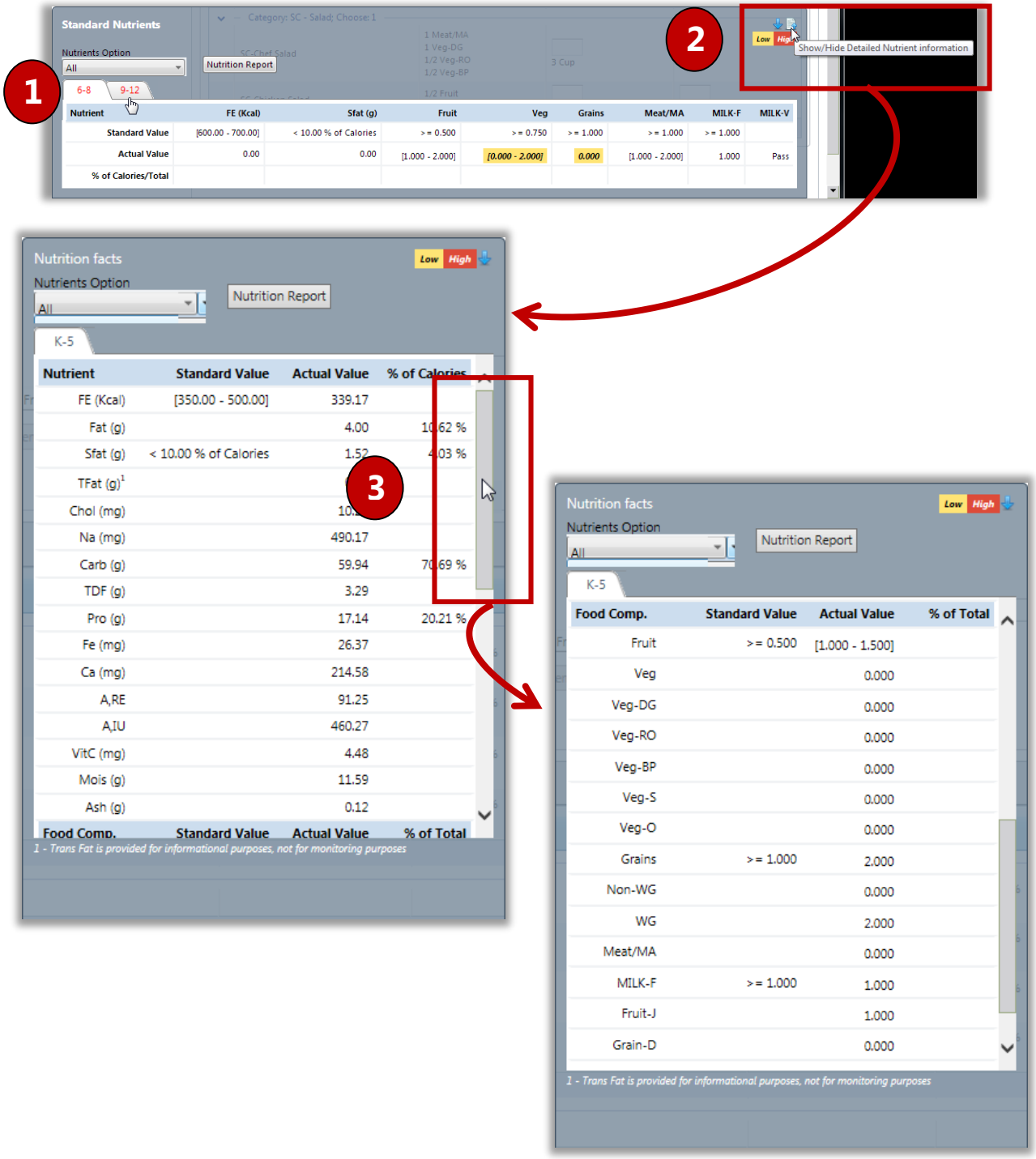
To view Standard Nutrients for a Serving Group

1. Display a menu and click **Show/Hide Standard Nutrients Footer** ( ).
2. Click a tab to view nutrients for a different serving group.



To view Standard Nutrients details for a Serving Group

1. Display a menu and click a tab to view nutrients for a serving group.
2. Click **Show/Hide Detailed Nutrient Information** ( ).
3. Scroll to view Food Component details.



Generating the Menu Nutrient Analysis Report

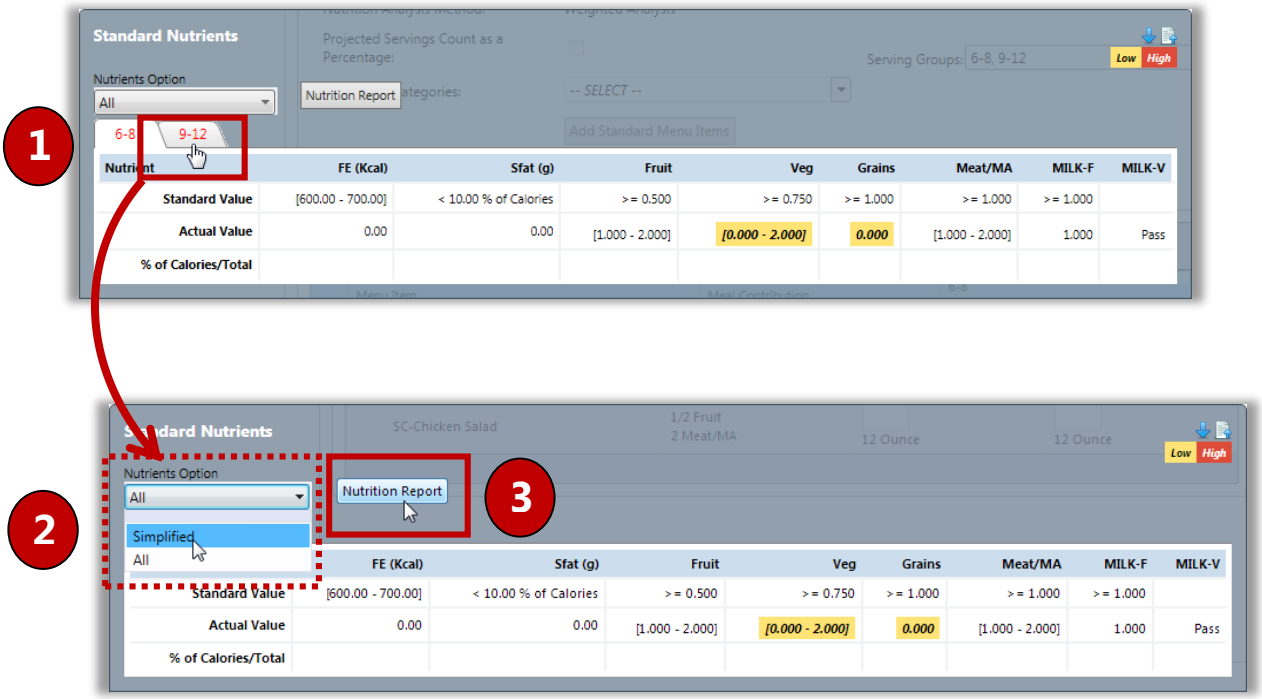
The Menu Nutrient Analysis Report displays either detailed nutrition information for all nutrients or "simplified" information that includes:

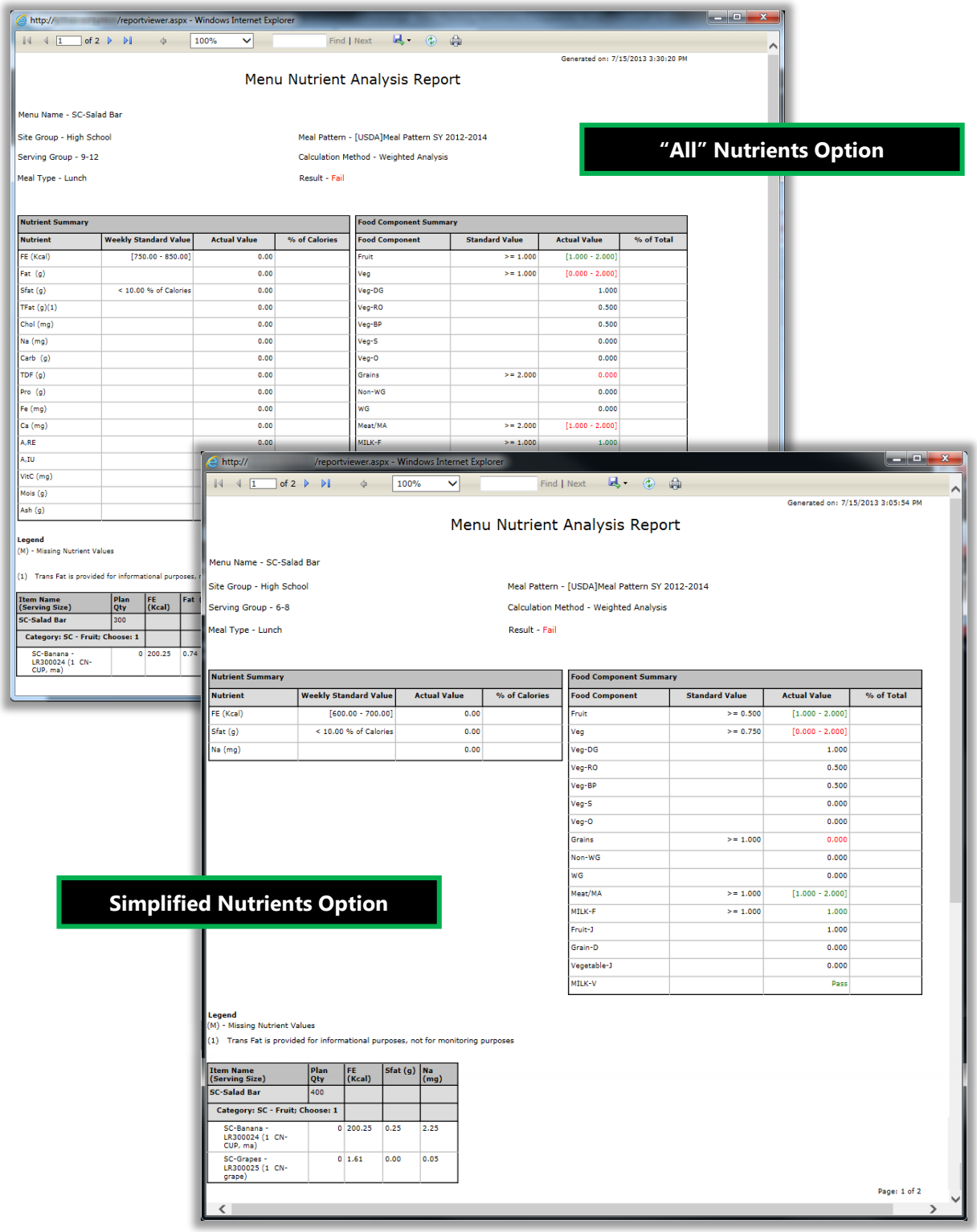
- Calories
- Saturated Fat
- Calcium

The default selection is "All" which is set through the Default Nutrients Option system setting.

To view Standard Nutrients details for a Serving Group

1. Display the Standard Nutrients footer for a menu and select a serving group.
2. Select a Nutrient Option.
3. Click Nutrition Report .





Menu Nutrient Analysis Report

Menu Name - SC-Salad Bar

Site Group - High School

Serving Group - 9-12

Meal Type - Lunch

Meal Pattern - [USDA]Meal Pattern SY 2012-2014

Calculation Method - Weighted Analysis

Result - Fail

Nutrient Summary			
Nutrient	Weekly Standard Value	Actual Value	% of Calories
FE (Kcal)	[750.00 - 850.00]	0.00	
Fat (g)		0.00	
Sfat (g)	< 10.00 % of Calories	0.00	
TFat (g)(1)		0.00	
Chol (mg)		0.00	
Na (mg)		0.00	
Carb (g)		0.00	
TDF (g)		0.00	
Pro (g)		0.00	
Fe (mg)		0.00	
Ca (mg)		0.00	
A,RE		0.00	
A,IU			
VitC (mg)			
Mois (g)			
Ash (g)			

Food Component Summary			
Food Component	Standard Value	Actual Value	% of Total
Fruit	>= 1.000	[1.000 - 2.000]	
Veg	>= 1.000	[0.000 - 2.000]	
Veg-DG		1.000	
Veg-RO		0.500	
Veg-BP		0.500	
Veg-S		0.000	
Veg-O		0.000	
Grains	>= 2.000	0.000	
Non-WG		0.000	
WG		0.000	
Meat/MA	>= 2.000	[1.000 - 2.000]	
MILK-F	>= 1.000	1.000	

Legend
(M) - Missing Nutrient Values
(1) Trans Fat is provided for informational purposes, not for monitoring purposes

Item Name (Serving Size)	Plan Qty	FE (Kcal)	Sfat (g)	Na (mg)
SC-Salad Bar	400			
Category: SC - Fruit; Choose: 1				
SC-Banana - LR300024 (1 CN-CUP, ma)	0	200.25	0.25	2.25
SC-Grapes - LR300025 (1 CN-grape)	0	1.61	0.00	0.05

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Page: 1 of 2

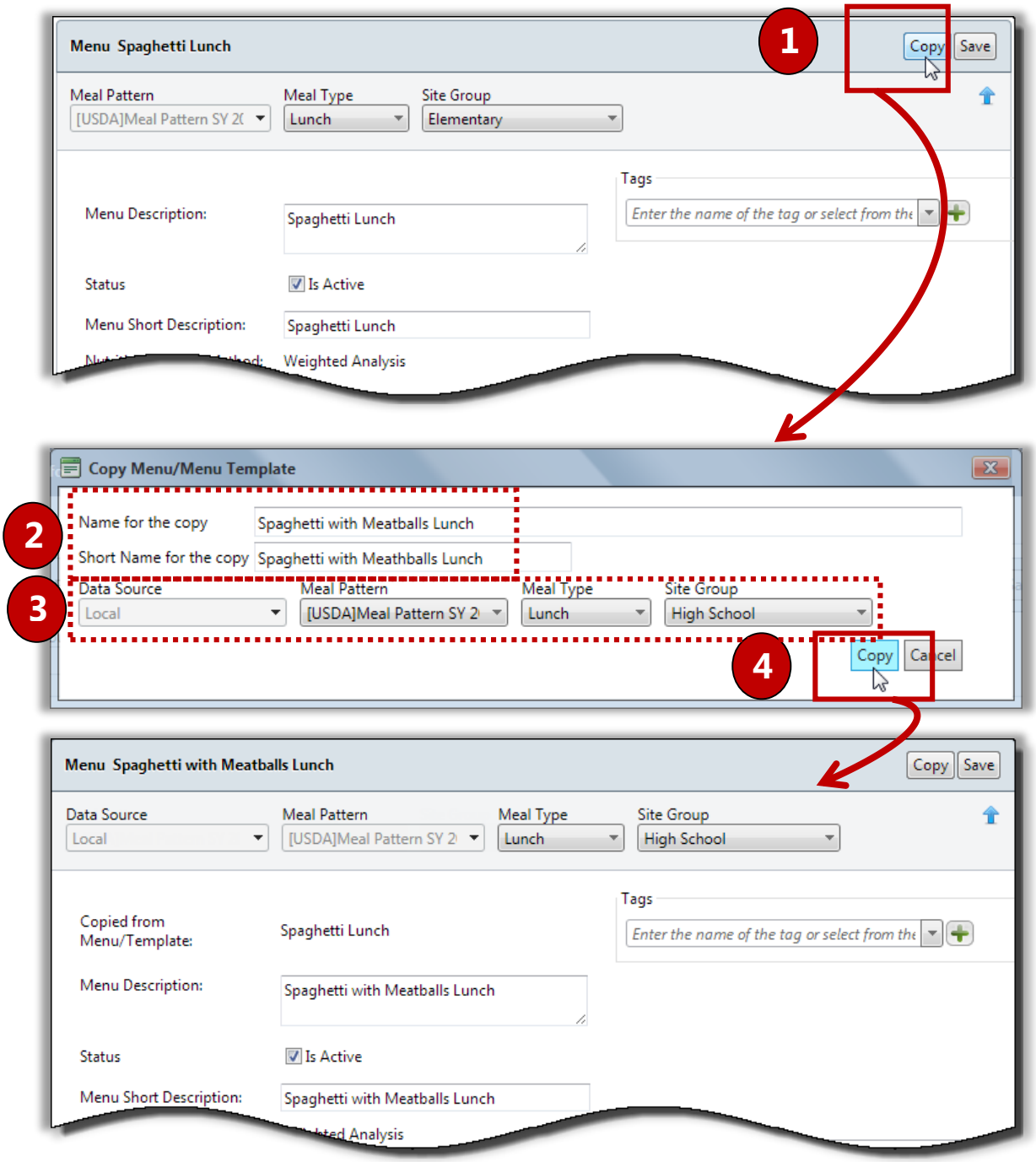
TIP

Click **Print** ( ) in the window toolbar to print the report.

Copying a Menu

To copy a Menu

1. Display a Menu and click Copy .
2. Enter a **Name for the menu copy** and a **Short Name for the menu copy**.
3. Select a new **Data Source, Meal Pattern**, **Meal Type**, and **Site Group**, if needed.
4. Click Copy .

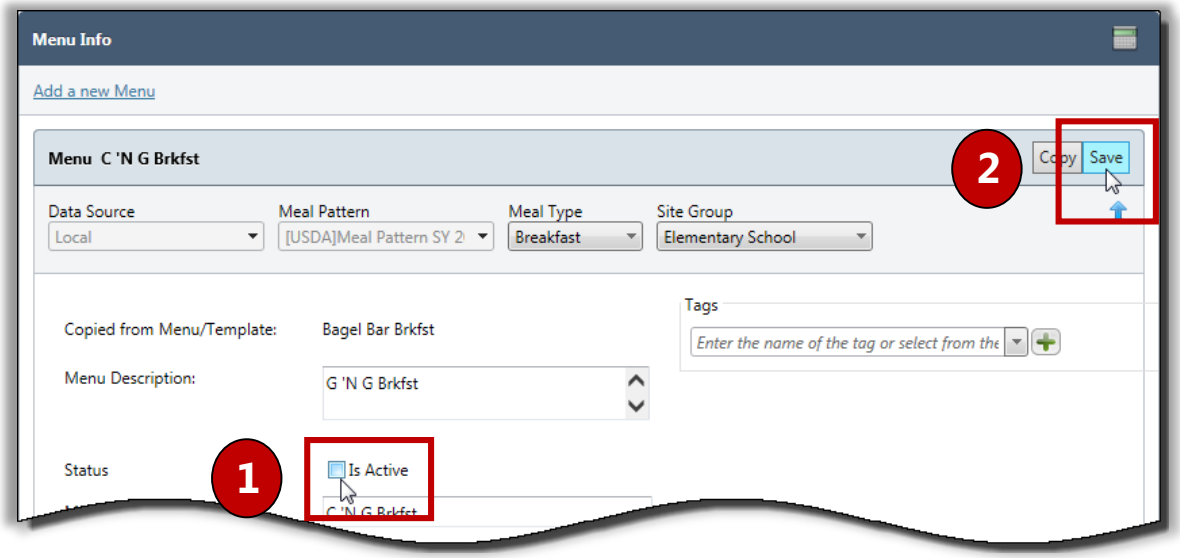


Discontinuing a Menu

Menus are never removed or deleted but they can be "discontinued" (made inactive) such that they do not appear in lists unless specifically specified to do so.

To discontinue a Menu

1. Display the Menu and clear **Is Active**.
2. Click Save .



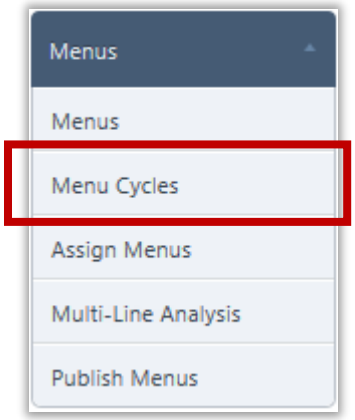
TIP

To include discontinued menus in lists, select **Include discontinued menus** in the search conditions.

To reactivate a Menu

1. Display the Menu and select **Is Active** to reapply the check mark.
2. Click Save .

Menu Cycles



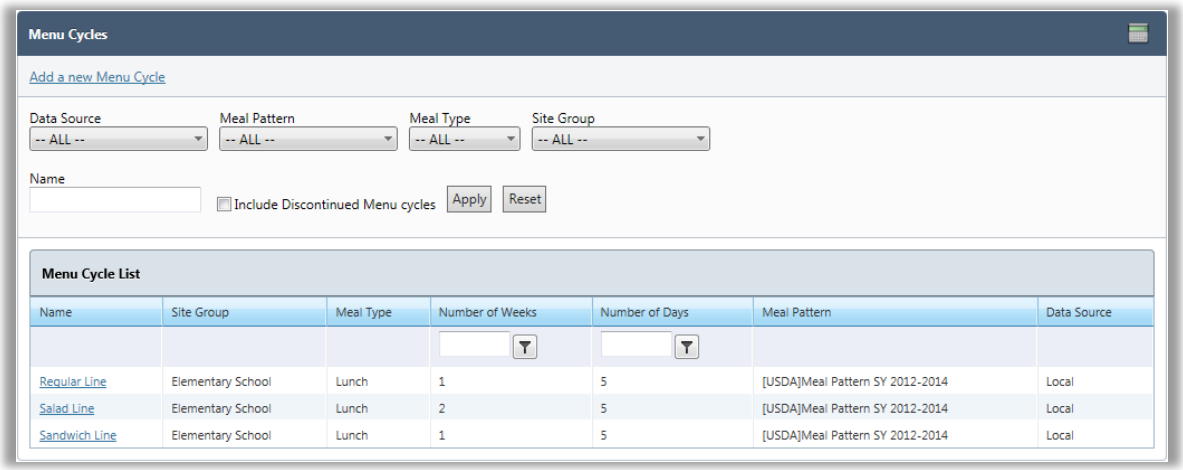
Menu Cycles adds and maintains cycles (sets) of menus that are used to quickly assign menus for a selected period of time. Cycle Menus are planned for a set period of time and repeated on a regular basis

Menus in a Menu Cycle are assigned by day and can be removed or added as needed. Menu Cycle details can be changed as needed.

Menu Cycle Particulars

- Menu Cycles can be made inactive (discontinued).
- Menu Cycles can include Menus that were made inactive after they were added to the Menu Cycle.
- Inactive Menus can be added to Menu Cycles.
- An inactive Menu Cycle can be copied; copy is active by default.
- To list inactive Menu Cycles in a search results, the **Include Discontinued Menu Cycles** option must be selected.

Menu Cycles Page



By default on the **Menu Cycles** page:

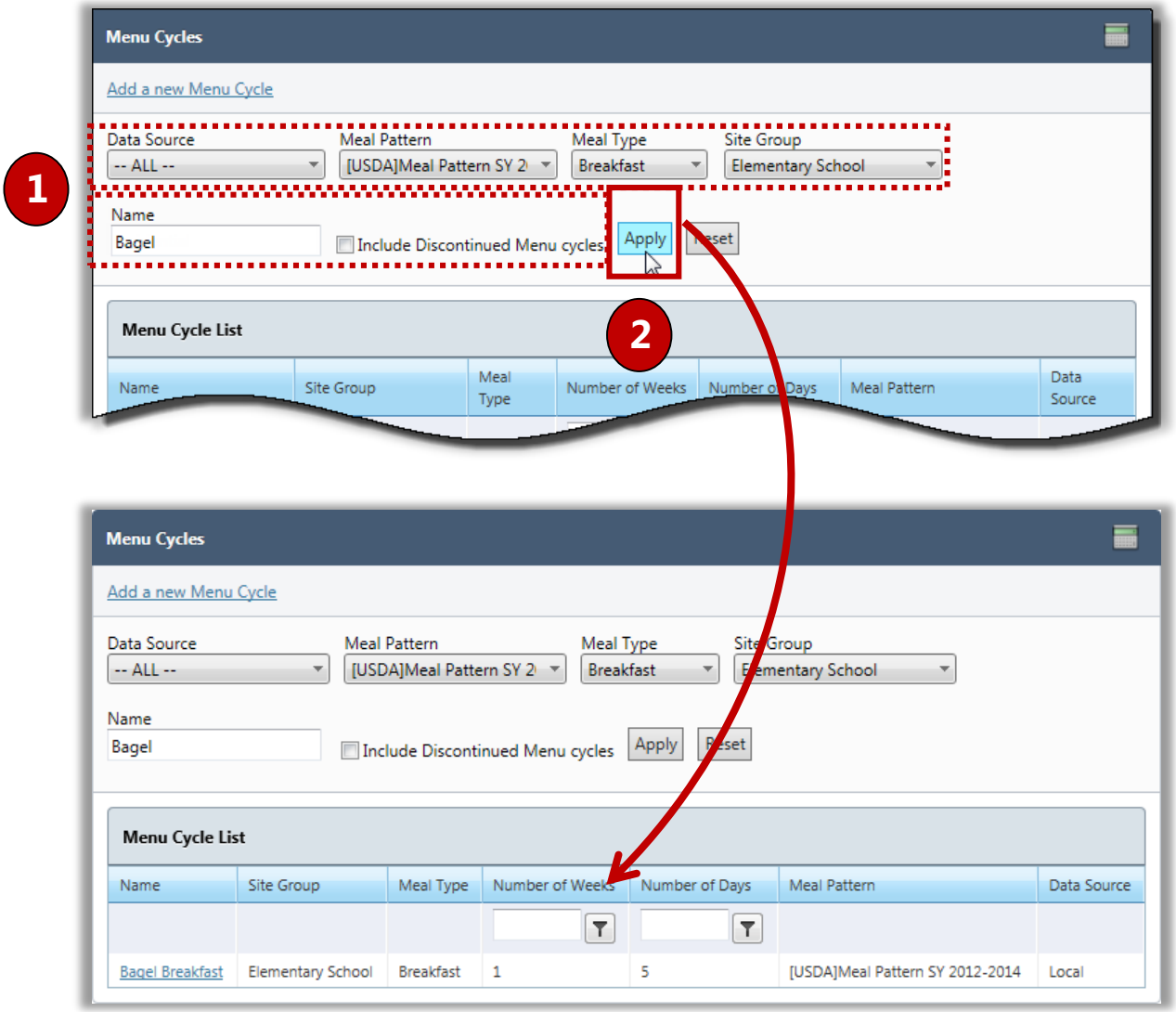
- **Data Source, Meal Pattern**, **Meal Type**, and **Site Group** are set to "ALL".
- **Name** is blank.
- **Include Discontinued Menu cycles** is cleared.

Searching for a Menu Cycle

Five separate search conditions can be used to narrow your search for a Menu Cycle or group of menu cycles. By default, active Menu Cycles are listed in the search results. To include inactive Menu Cycles, select the **Include Discontinued Menu Cycles** option.

To search for a Menu Cycle

3. Select or enter one or more search conditions.
4. Click Apply .

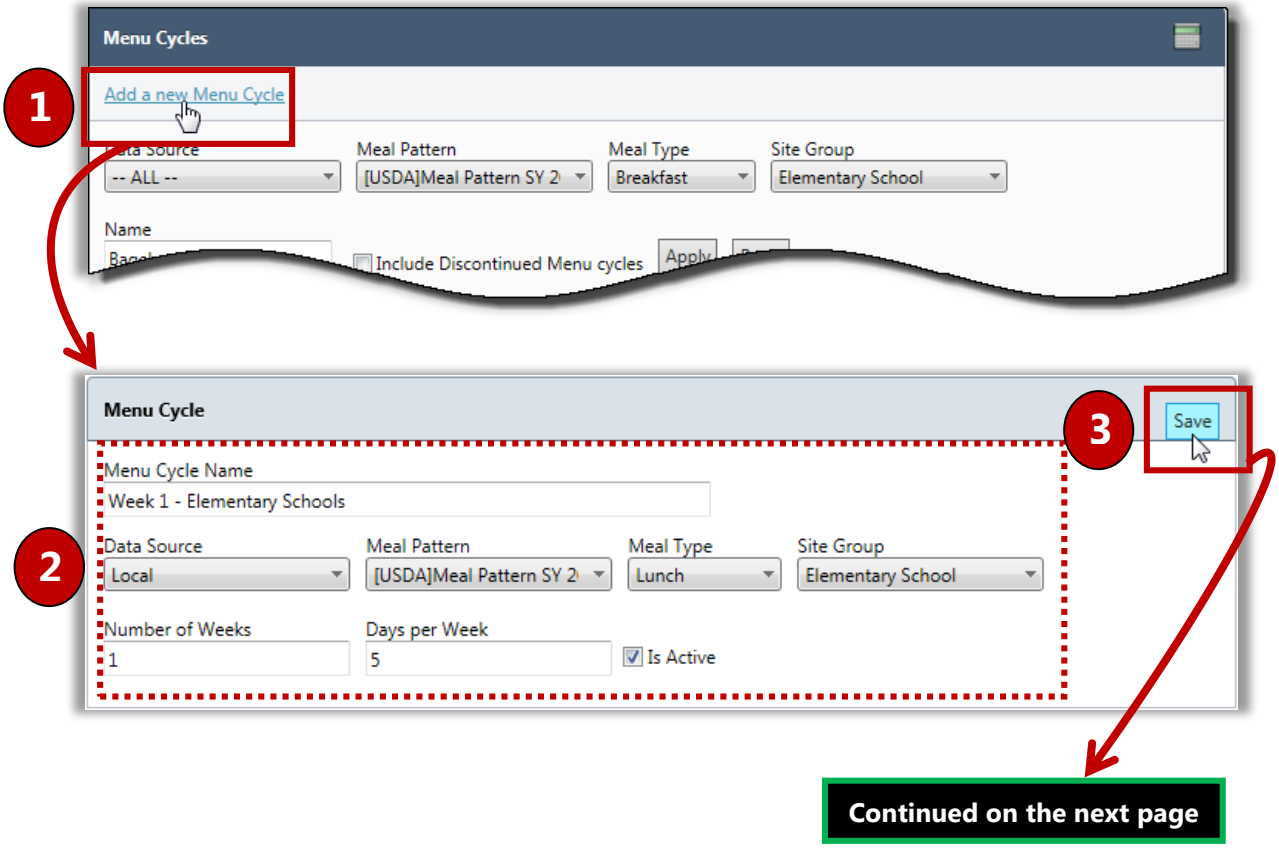


Adding a Menu Cycle

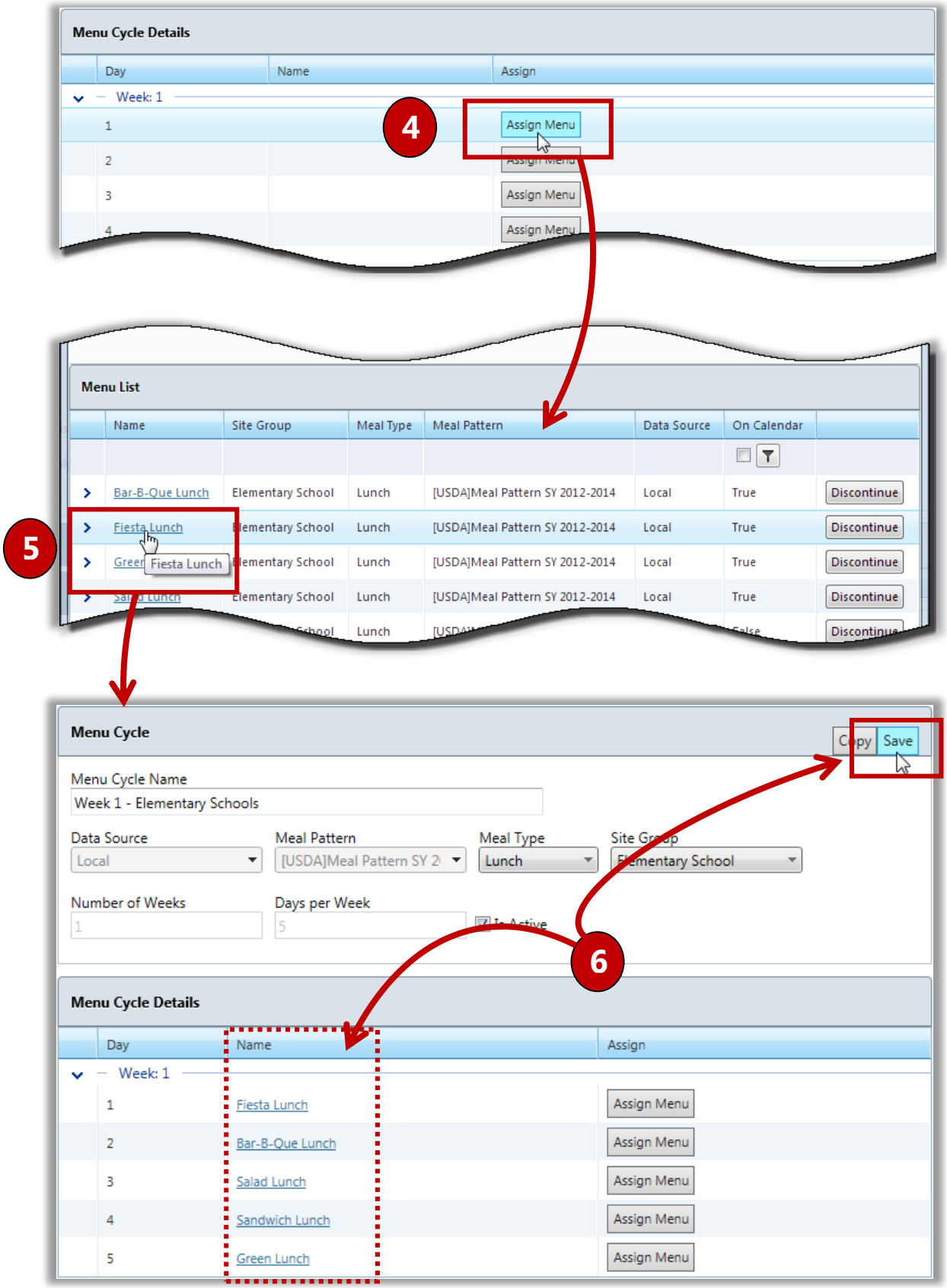
After your menus are created, you are ready to create a Menu Cycle. The number of days in a Menu Cycle is set through the **Menu Cycle – Maximum Days per Cycle** system setting.

To add a Menu Cycle

1. Click the **Add a new Menu Cycle** link.
2. Select or enter the Menu Cycle details for **Name**, **Data Source**, **Meal Pattern**, **Meal Type**, **Site Group**, **Number of Weeks** and **Days per Week**
3. Click Save .
4. Click Assign Menu in the first day listing of the first week in the Menu Cycle.
5. Click a Menu name in the list of available menus; Menu name appears in Menu Cycle list.
6. Repeat step 5 for each Menu to add to the Menu Cycle; when all menus have been added for each day and week of the Menu Cycle, click Save .



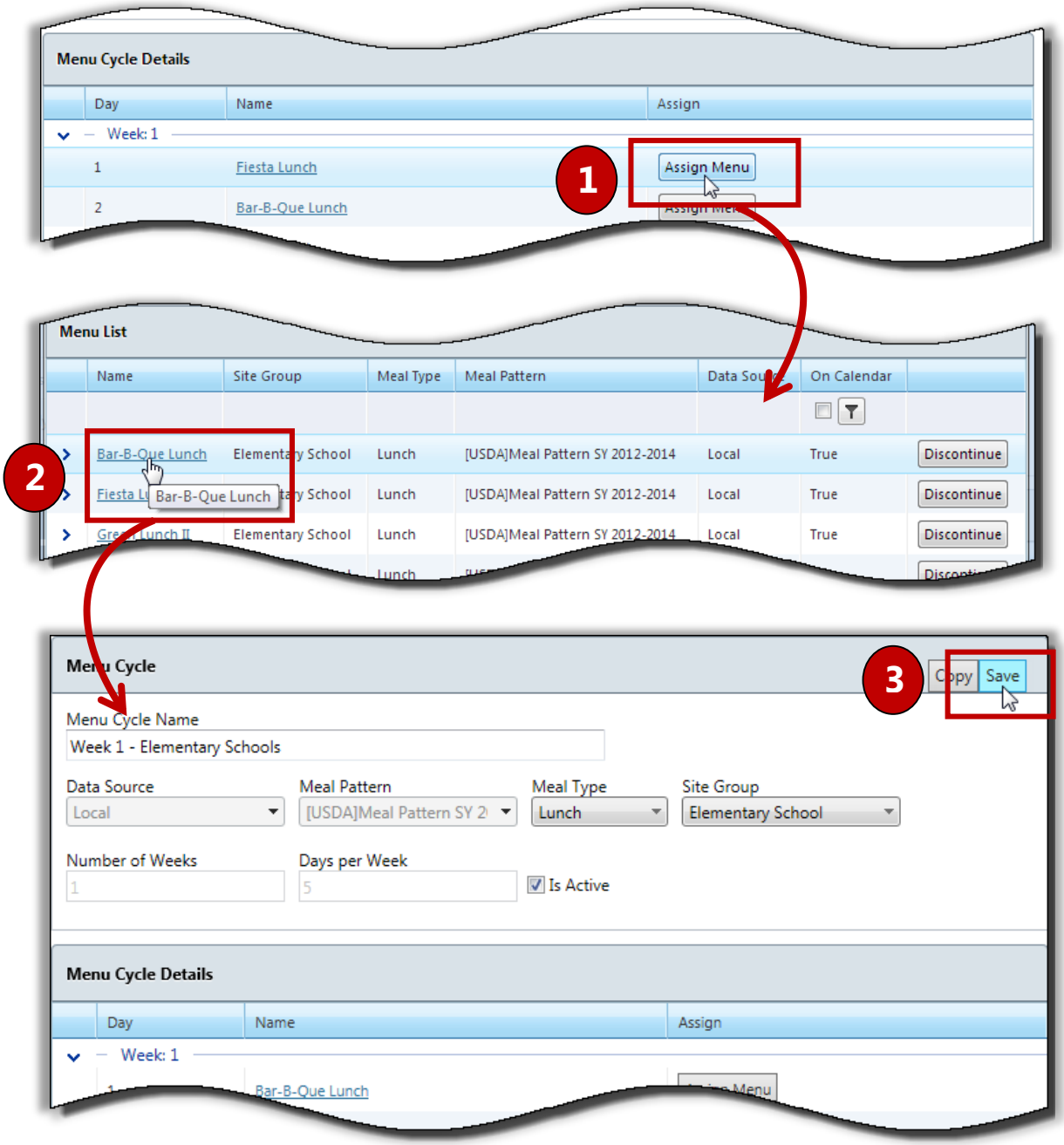
Continued on the next page


Menu Cycle Details
Day
Name
Assign
Week: 1
1
2
3
4
Assign Menu
4
Menu List
Name
Site Group
Meal Type
Meal Pattern
Data Source
On Calendar
Bar-B-Que Lunch
Elementary School
Lunch
[USDA]Meal Pattern SY 2012-2014
Local
True
Discontinue
Fiesta Lunch
5
Menu Cycle
Copy
Save
Menu Cycle Name
Week 1 - Elementary Schools
Data Source
Local
Meal Pattern
Meal Type
Lunch
Site Group
Number of Weeks
1
Days per Week
5
6
Menu Cycle Details
Fiesta Lunch
Bar-B-Que Lunch
Salad Lunch
Sandwich Lunch
Green Lunch

Replacing a Menu in a Menu Cycle

To replace a Menu in a Menu Cycle

1. Display a Menu Cycle and click Assign Menu in the menu listing to be replaced.
2. Click a Menu name in the list of available menus.
3. Click Save .

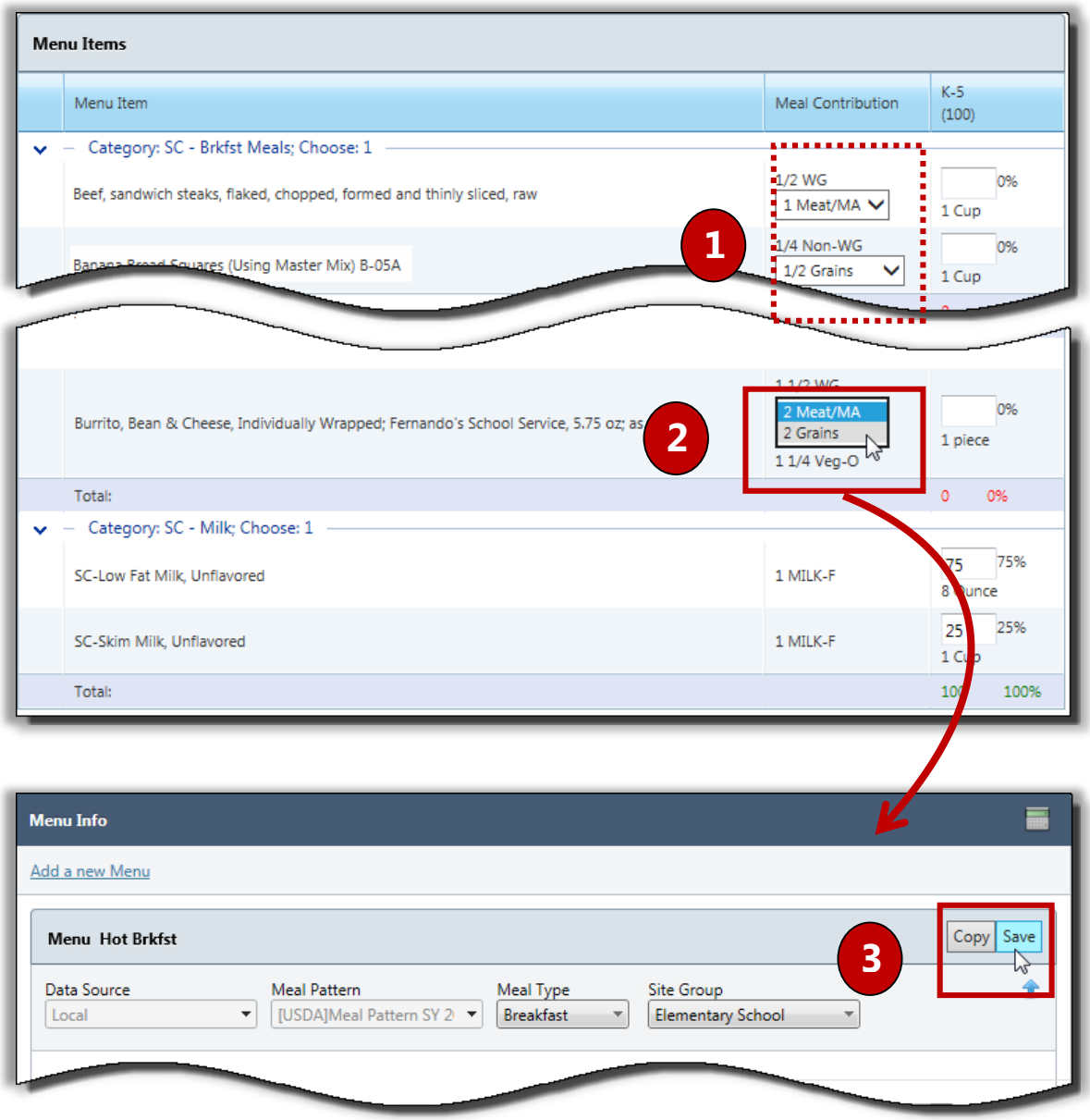


Meat/Meat Alternate Grain Substitution

Grain contributions can be substituted for Meat/MA meal contributions for a **Breakfast** Menu Item.

To substitute a Grain contribution for a Meat/MA contribution

1. Display Menu Items for a Breakfast Menu; Menu Items that provide Meat/MA or Grains contributions will show an available drop-down list.
2. Select a substitution.
3. Click Save .



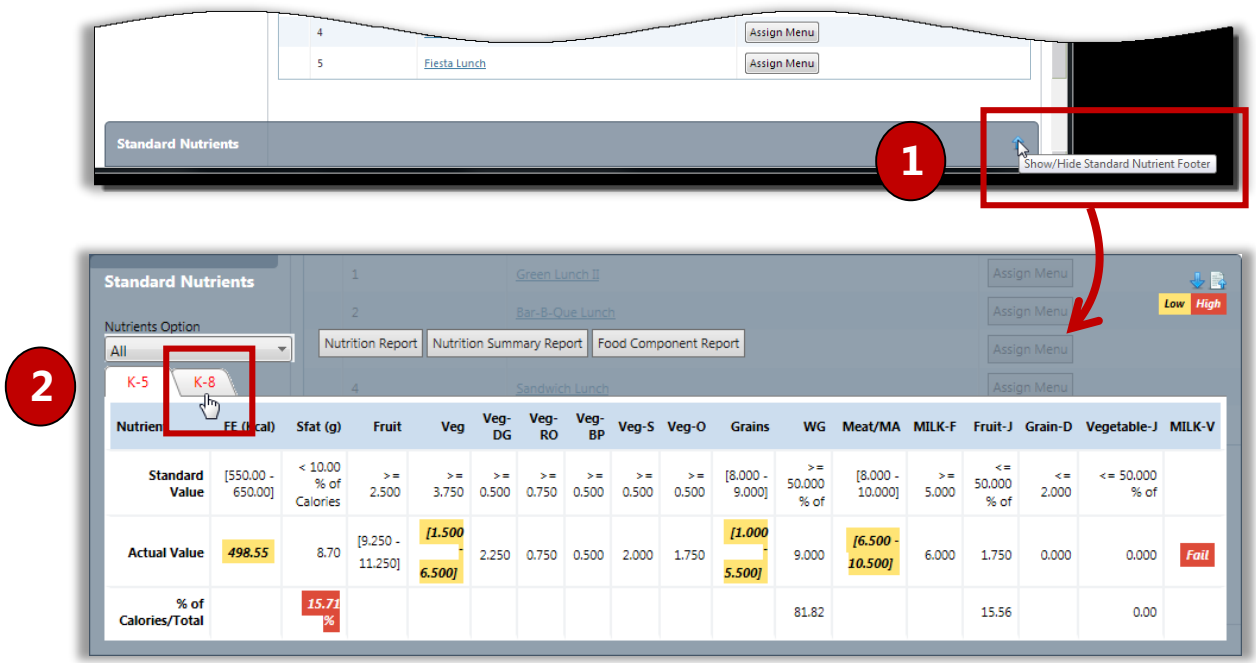
Viewing Menu Cycle Nutrients and Food Components

Each menu cycle display includes a Standard Nutrients footer. This footer provides one tab of menu cycle nutrition information for each serving group.

- Nutrient values that fall *below* the requirements for a food component are highlighted in **yellow**.
- Nutrient values that fall *above* the maximum nutritional requirements are highlighted in **red**.
- Fail message in the **Milk-V** column indicates that the requirement for providing at least two choices (a "variety" of milks) in each meal service has not been met.

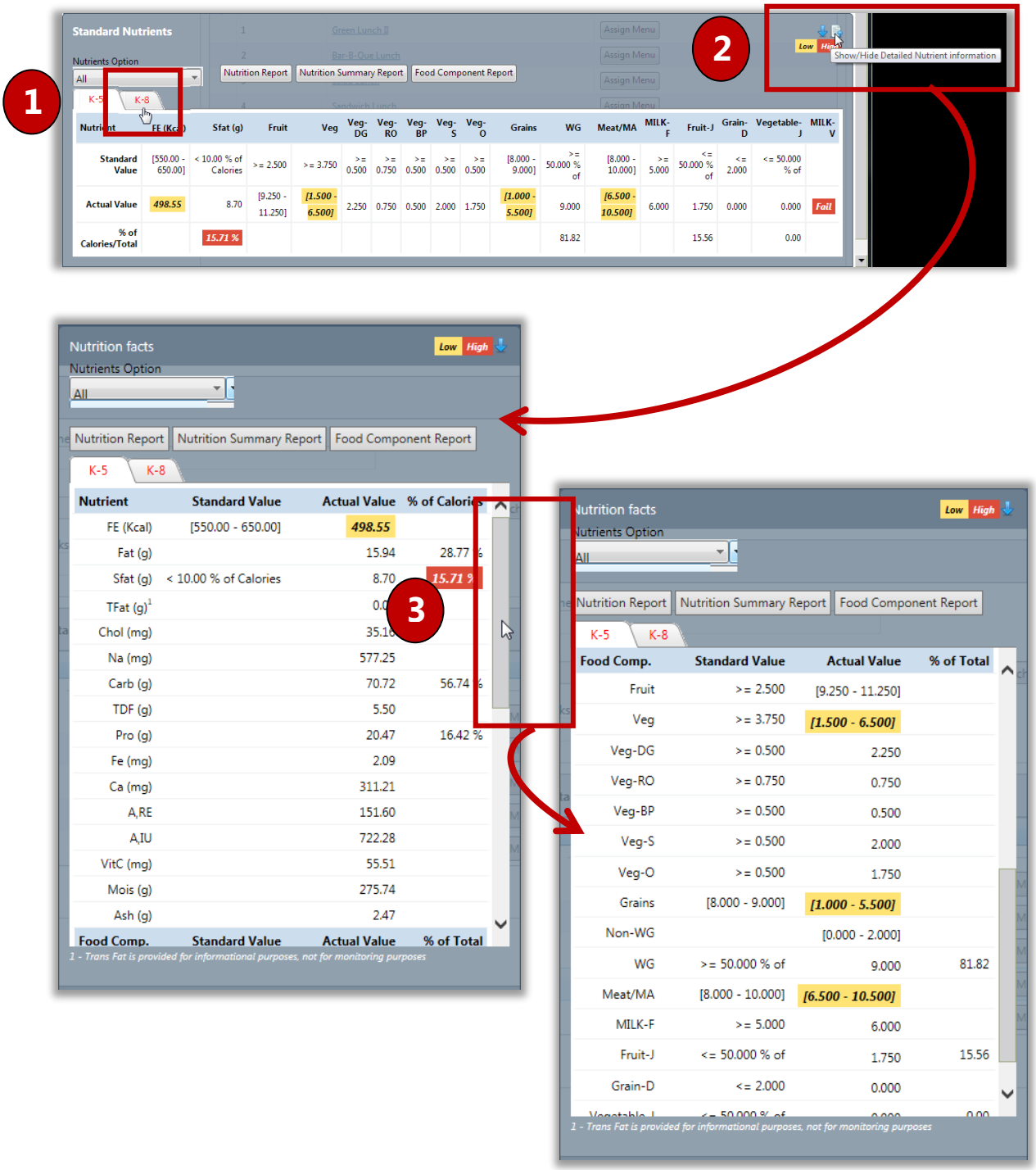
To view Standard Nutrients for a Serving Group

1. Display a menu and click **Show/Hide Standard Nutrients Footer** ( ).
2. Click a Serving Group tab to view nutrients, if needed.



To view Standard Nutrients details for a Serving Group

1. Display a menu and click a Serving Group tab to view nutrients.
2. Click **Show / Hide Detailed Nutrients Information** ( ).
3. Scroll to view Food Component details.



Generating a Menu Cycle Week Nutrient Analysis Report

The Menu Nutrient Analysis Report displays either detailed nutrition information for "All" nutrients or "simplified" information that only includes:

Calories Saturated Fat Calcium

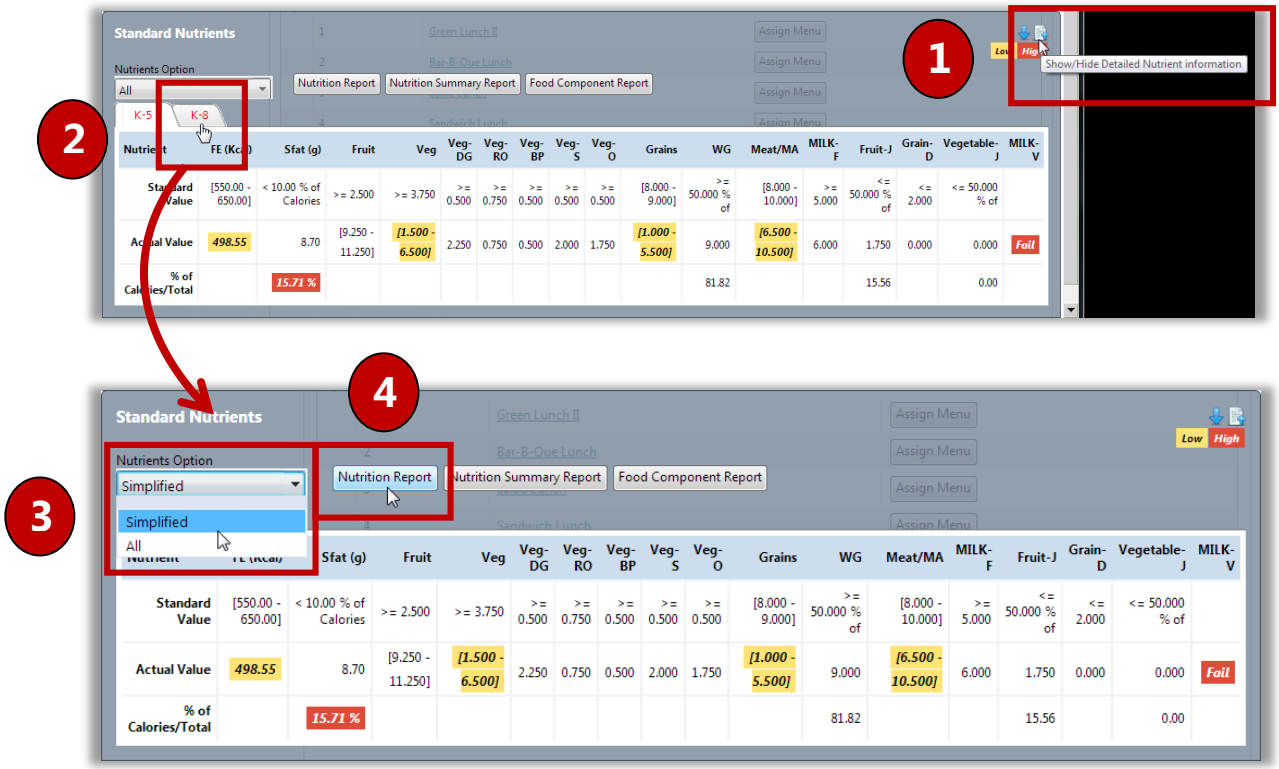
Highlighted report values include

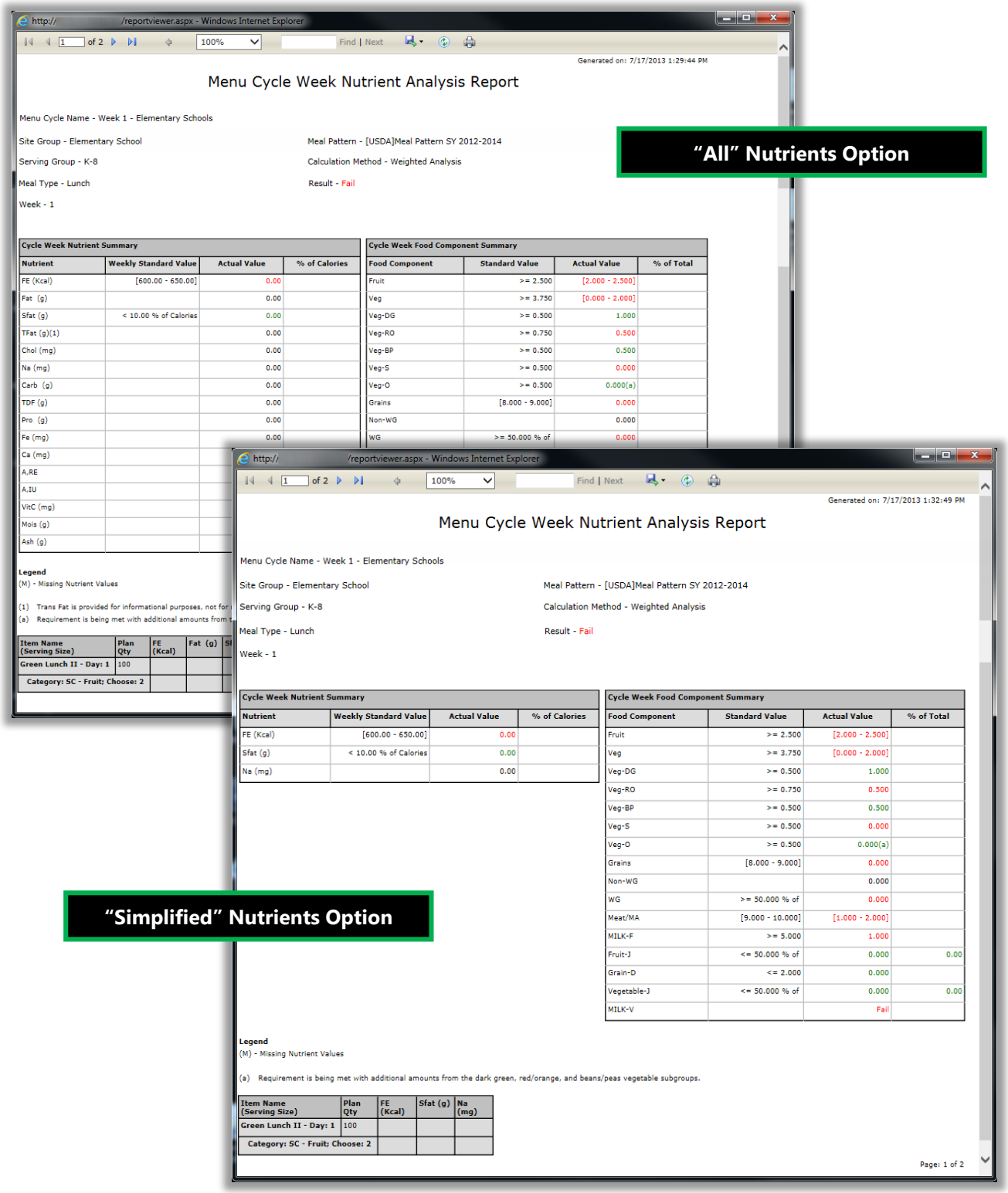
- Nutrient values that fall *within* the requirements ***for the week*** are shown in green in the **Actual Value** column;
- Nutrient values that fall *outside* (above or below) the requirements ***for the week*** are shown in ***red*** in the **Actual Value** column.

The default **Nutrient Option** selection is "All"; the default value for this selection is set through the Default Nutrients Option system setting.

To view Standard Nutrients analysis for a Serving Group

1. Show the Standard Nutrients footer for a menu.
2. Select a Serving Group, if needed.
3. Select a Nutrients Option, if needed.
4. Click Nutrition Report .





TIP

Click **Print** ( ) on the window toolbar to print the report.

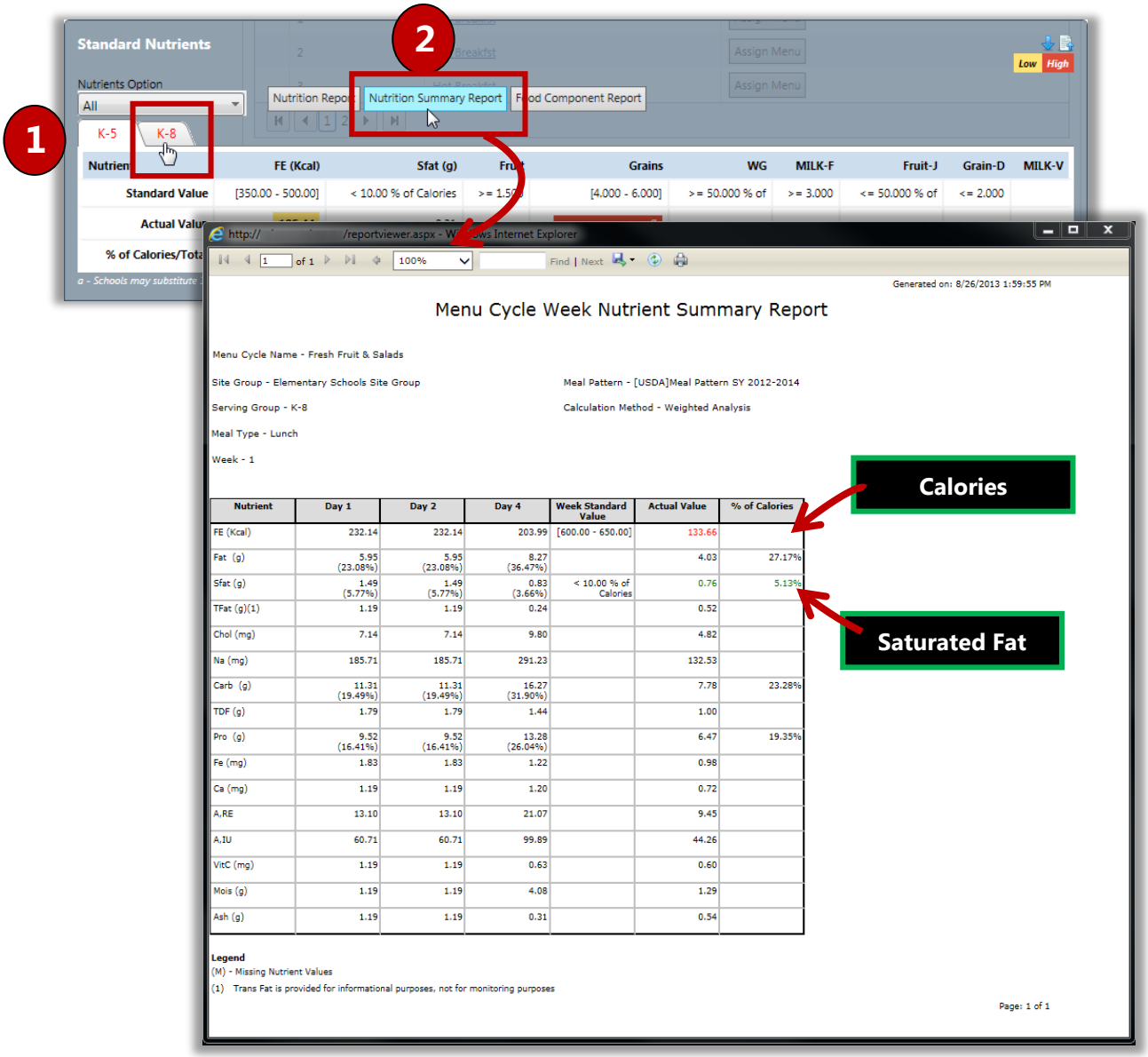
Generating a Menu Cycle Week Nutrient Summary Report

The Menu Cycle Week Nutrient Summary Report displays the daily totals, the average daily value (Actual Value), and the percentage of total weekly calories for each nutrient.

- Weekly calorie values that fall *outside* (above or below) the weekly requirements are shown in **red** in **Actual Value**.
- Saturated Fat values that fall *below* the weekly requirements are shown in ***green*** in **Actual Value** and **% of Calories**.

To view the Menu Cycle Week Nutrient Summary Report for a Serving Group

1. Display the Standard Nutrients footer for a menu and select a Serving Group, if needed.
2. Click Nutrition Summary Report .



Nutrient	Day 1	Day 2	Day 4	Week Standard Value	Actual Value	% of Calories
FE (Kcal)	232.14	232.14	203.99	[600.00 - 650.00]	133.66	
Fat (g)	5.95 (23.08%)	5.95 (23.08%)	8.27 (36.47%)		4.03	27.17%
Sfat (g)	1.49 (5.77%)	1.49 (5.77%)	0.83 (3.66%)	< 10.00 % of Calories	0.76	5.13%
TFat (g)(1)	1.19	1.19	0.24		0.52	
Chol (mg)	7.14	7.14	9.80		4.82	
Na (mg)	185.71	185.71	291.23		132.53	
Carb (g)	11.31 (19.49%)	11.31 (19.49%)	16.27 (31.90%)		7.78	23.28%
TDF (g)	1.79	1.79	1.44		1.00	
Pro (g)	9.52 (16.41%)	9.52 (16.41%)	13.28 (26.04%)		6.47	19.35%
Fe (mg)	1.83	1.83	1.22		0.98	
Ca (mg)	1.19	1.19	1.20		0.72	
A,RE	13.10	13.10	21.07		9.45	
A,IU	60.71	60.71	99.89		44.26	
VitC (mg)	1.19	1.19	0.63		0.60	
Mois (g)	1.19	1.19	4.08		1.29	
Ash (g)	1.19	1.19	0.31		0.54	

Generating a Weekly Food Component Report

The Weekly Food Component Report displays daily values and weekly totals for each required food component along with a Pass / Fail weekly check for component requirements. Details of component sub-categories appear below the component summary information, such as Dark Green, Red/Orange, etc., for the Vegetables component.

Highlighted report values include

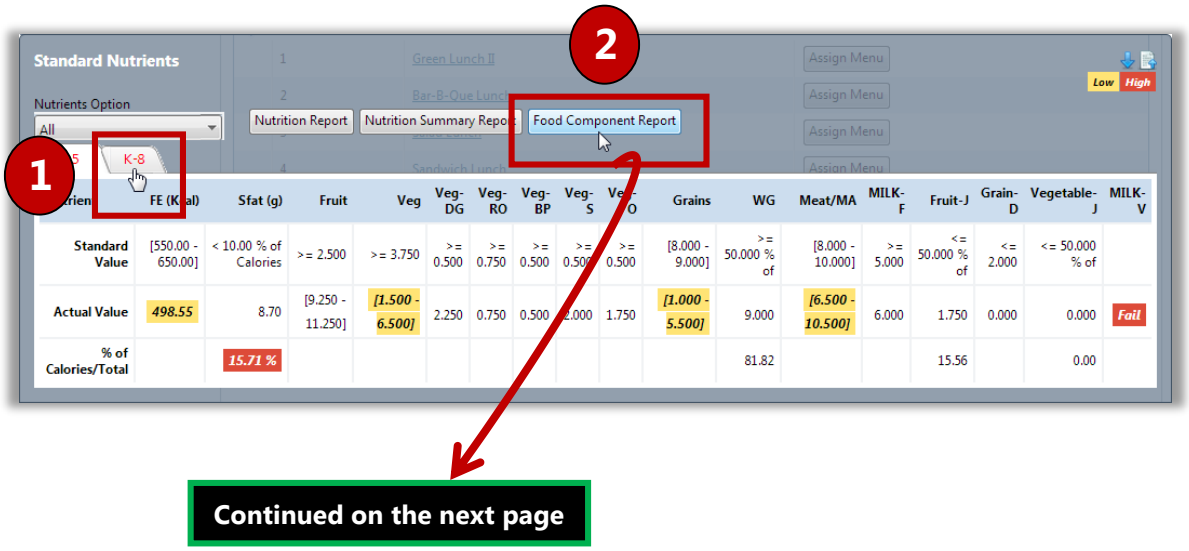
- Nutrient values for a food component that fall *within* the requirements ***for the day*** are shown in ***green***;
- Nutrient values for a food component that fall *within* the requirements ***for the week*** display "**Pass**" in the **Weekly Requirement Check** column;
- Nutrient values for a food component that fall *outside* (above or below) the requirements ***for the day*** are highlighted in ***red***.
- Nutrient values for a food component that fall *outside* (above or below) the requirements ***for the week*** display "**Fail**" in the **Weekly Requirement Check** column.

If Grains have been substituted for Meat/Meat Alternate components, the Weekly Food Component Report includes two extra lines of information in the Grains group:

- Actual Grains – actual grain amounts (Grains not acting as M/MA)
- M/MA acting as Grains – substitution amounts

To view the Weekly Food Component Report for a Serving Group

1. Display the Standard Nutrients footer for a menu and select a Serving Group, if needed.
2. Click Food Component Report .



http:// reportviewer.aspx - Windows Internet Explorer

1 of 1 100% Find | Next

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Weekly Food Component Report

Menu Cycle Name - Breakfast Grill

Site Group - Elementary School

Serving Group - K-5

Week - 1

Meal Pattern - [USDA]Meal Pattern SY 2012-2014

Meal Type - Breakfast

Fruit (cups)	Day 1	Day 2	Day 3	Weekly Total	Weekly Requirement	Weekly Requirement Check
Minimum Fruits (cups)	2.500 (Pass)	2.500 (Pass)	2.500 (Pass)	7.500	≥ 1.500	Pass

Weekly Fruit Juice Limit Requirement	Total Weekly Fruit	Total Weekly Fruit Juice	Percent of Total Weekly Fruit that is Juice	Weekly Requirement Check
≤ 50.000 % of	7.500	3.000	40.000%	Pass

Vegetables (cups)	Day 1	Day 2	Day 3	Weekly Total	Weekly Requirement	Weekly Requirement Check
Vegetables (cups)	1.500	1.500	1.500	4.500	≥ 0.00	Pass
Dark Green	0.250	0.250	0.250	0.750	≥ 0.00	Pass
Red/Orange	0.000	0.000	0.000	0.000	≥ 0.00	Pass
Beans/Peas (Legumes)	0.000	0.000	0.000	0.000	≥ 0.00	Pass
Starchy	0.000	0.000	0.000	0.000	≥ 0.00	Pass
Other	1.250	1.250	1.250	3.750	≥ 0.00	Pass

Weekly Vegetable Juice Limit Requirement	Total Weekly Vegetables	Total Weekly Vegetable Juice	Percent of Total Weekly Vegetables that is Juice	Weekly Requirement Check
≥ 0.00 %	4.500	0.000	0.00%	Pass

Meat / Meat Alternate (oz eq.)	Day 1	Day 2	Day 3	Weekly Total	Weekly Requirement	Weekly Requirement Check
Meat/Meat Alternates (oz eq.)	0.000	0.000	0.000	0.000	≥ 0.00	Pass

Grains (oz eq.)	Day 1	Day 2	Day 3	Weekly Total	Weekly Requirement	Weekly Requirement Check
Grains (oz eq.)	[4.250 - 5.000] (Pass) (a)	[4.250 - 5.000] (Pass) (a)	[4.250 - 5.000] (Pass) (a)	[12.750 - 15.000] (a)	[4.000 - 6.000]	Fail (a)
Actual Grains	[1.750 - 2.000]	[1.750 - 2.000]	[1.750 - 2.000]			
M/MA acting as Grains	[2.500 - 3.000]	[2.500 - 3.000]	[2.500 - 3.000]			

Substitutions

Weekly Whole Grain Rich	Weekly Grains Total	Weekly Whole Grain Rich Total	Percent of Whole Grain Rich	At Least Half Whole Grain Rich	Grain Based Dessert Total for All Weekly Meals	No More Than 2oz eq. of Grain Based Desserts
≥ 50.000 % of	6.750	6.000	88.889%	Pass	0.000	Pass

(a) Schools may substitute 1 oz. M/MA for Grains after the minimum daily Grains requirement is met.

Milk (cups)	Day 1	Day 2	Day 3	Weekly Total	Weekly Requirement	Weekly Requirement Check
Minimum Fluid Milk (cups)	2.000 (Pass)	2.000 (Pass)	2.000 (Pass)	6.000	≥ 3.000	Pass
Skim/fat-free, unflavored; Skim/fat-free, flavored; Low-fat (1% or less), unflavored	Pass	Pass	Pass			
Low-fat (1% or less), flavored						
Reduced fat (2% fat) or whole, unflavored and flavored						

*USDA is offering flexibility for SY 2012-2013 and SY 2013-2014 by allowing SFAs to exceed the maximum amount of grains and meat/meat meal alternates as long as the daily and weekly minimums for these components are met and the calories are within the required range. If you exceed the weekly maximum for grain and/or meat/meat alternates, your report will say that you fail for those categories, but that is acceptable at this time.

Page: 1 of 1

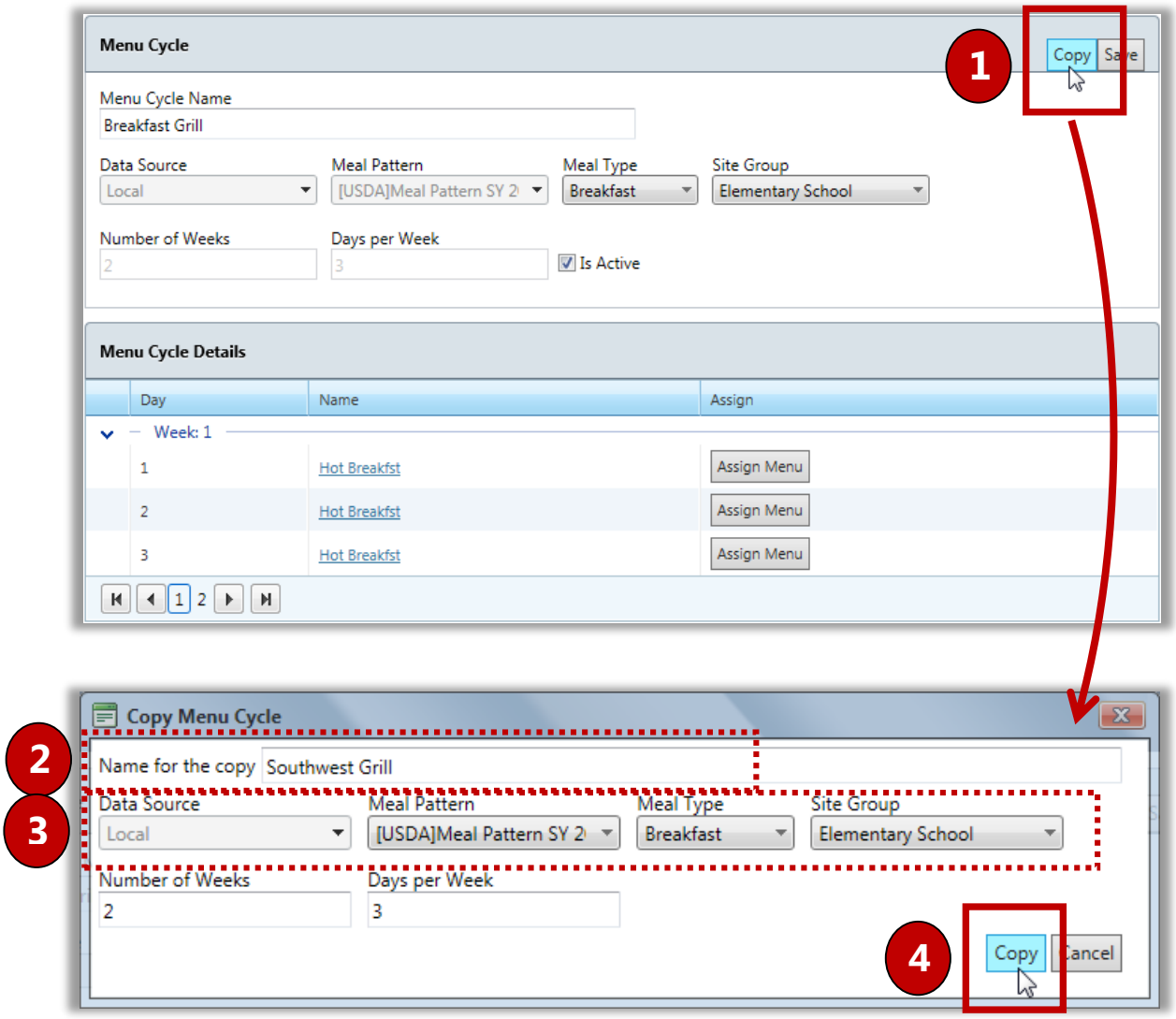
TIP

- Click **Print** ( ) in the window toolbar to print the report.

Copying a Menu Cycle

To copy a Menu Cycle

1. Display a Menu Cycle and click Copy .
2. Enter a **Name for the copy**.
3. Make changes to **Data Source, Meal Pattern**, **Meal Type**, **Site Group**, **Number of Weeks**, and **Days per Week**.
4. Click Copy .

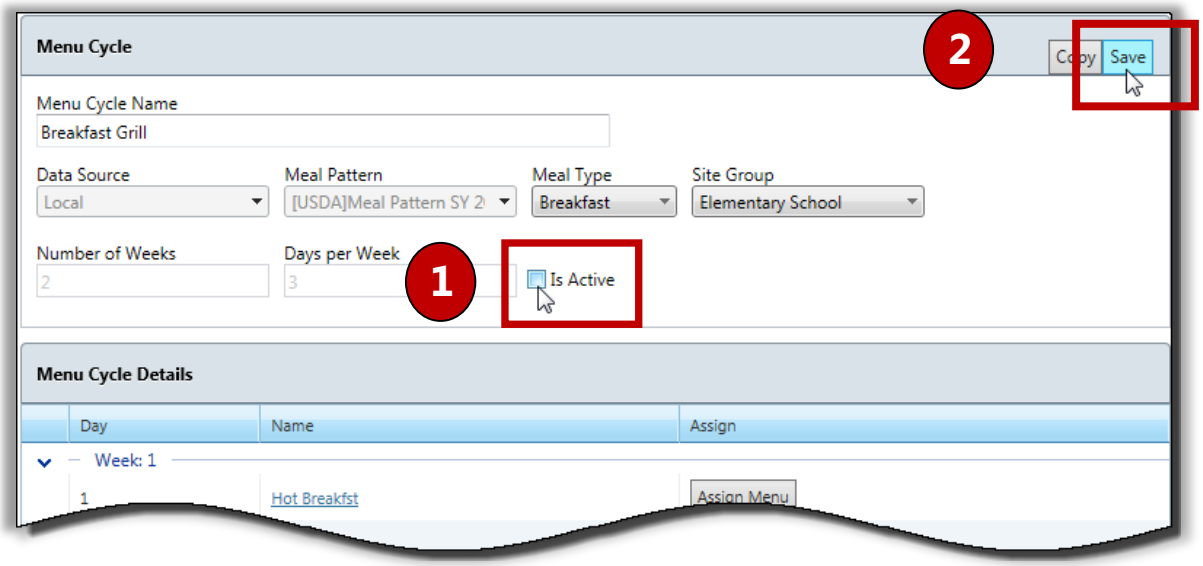


Discontinuing a Menu Cycle

Menu Cycles are never removed or deleted but they can be "discontinued" (made inactive) such that they do not appear in lists unless specifically specified to do so.

To discontinue a Menu Cycle

1. Display a Menu Cycle and clear **Is Active**.
2. Click Save .



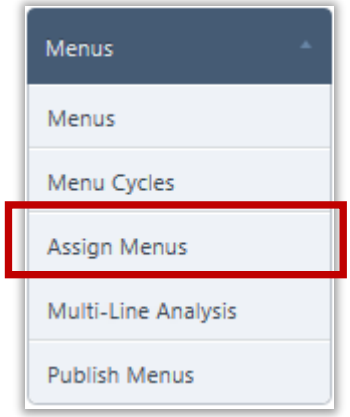
TIP

To include discontinued menu cycles in lists, select the **Include Discontinued Menu cycles** option in the search conditions on the **Menu Cycles** page.

To reactivate a Menu Cycle

1. Display the Menu Cycle and select **Is Active** to reapply the check mark.
2. Click Save .

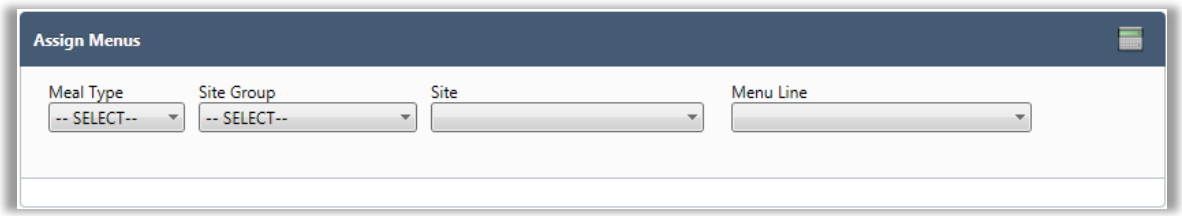
Assign Menus



Assign Menus allows you to assign a menu or menu cycle to a calendar date.

Menus / menu cycles can be replaced, or they can be completely removed from a calendar date.

Assign Menus Page



By default on the **Assign Menus** page:

- **Meal Type** and **Site Group** are set to "Select".
- **Site** and **Menu Line** are blank.

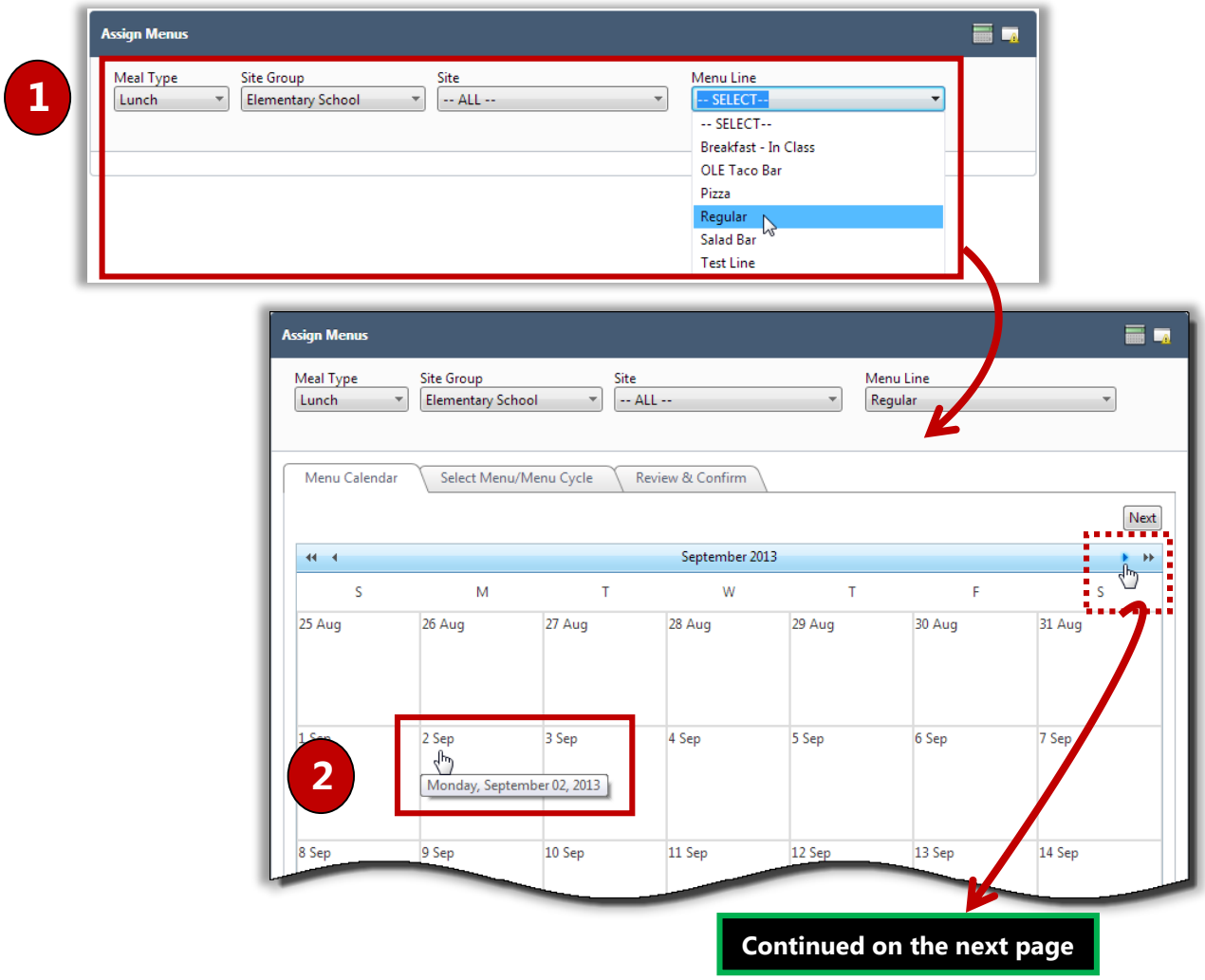
Assigning a Menu Cycle

When Menus and Menu Cycles are complete, they are assigned to a Menu Calendar. Menu calendars are automatically set up by Meal Type, Site Group, Site, and Menu Line. These conditions are selected to then display a menu calendar. By default, the Menu Calendar for the current month is shown. To move to a different calendar month, use these calendar controls:

- Move back one month
- Move forward one month
- Move to the *last viewed* future month.
- Move to the *last viewed* past month.

To assign a Menu Cycle to a Menu Calendar

1. Select a **Meal Type** and **Site Group**, and **Menu Line**; select a **Site**, if needed.
2. Move to a different calendar month, if needed, and click a calendar date.
3. Select a Menu Cycle in the **Menu Cycles** list and click Next .
4. Review the Serving Dates on which the menus will be assigned and click Assign .



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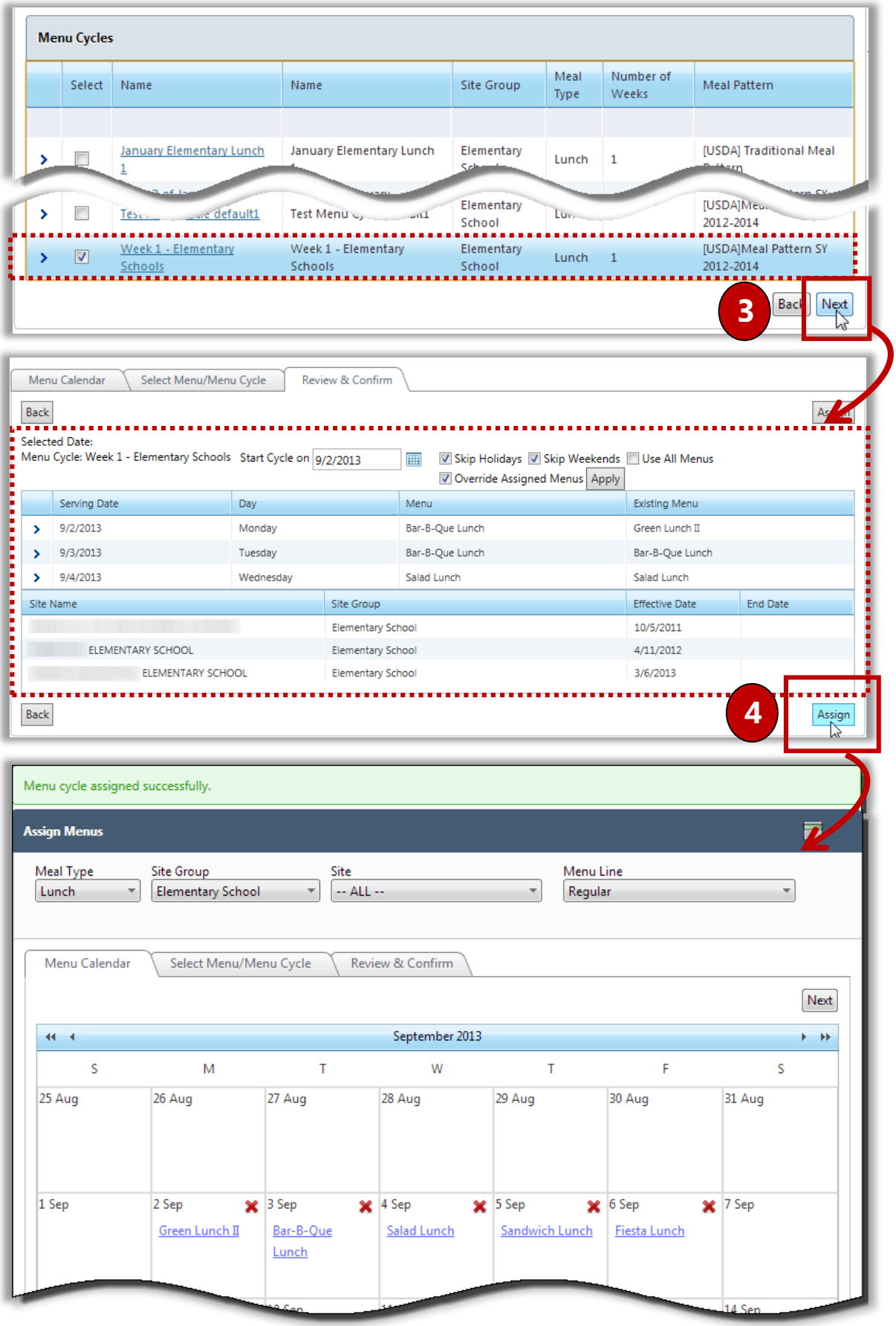

Menu Cycles
Select
Name
Name
Site Group
Meal Type
Number of Weeks
Meal Pattern
January Elementary Lunch 1
January Elementary Lunch
Elementary School
Lunch
1
[USDA] Traditional Meal Pattern
Test Menu Cycle default1
Test Menu Cycle default1
Elementary School
[USDA]Meal Pattern SY 2012-2014
Week 1 - Elementary Schools
Week 1 - Elementary Schools
Elementary School
Lunch
1
[USDA]Meal Pattern SY 2012-2014
3
Back
Next
Menu Calendar
Select Menu/Menu Cycle
Review & Confirm
Back
Assign
Selected Date:
Menu Cycle: Week 1 - Elementary Schools
Start Cycle on 9/2/2013
Skip Holidays
Skip Weekends
Use All Menus
Override Assigned Menus
Apply
Serving Date
Day
Menu
Existing Menu
9/2/2013
Monday
Bar-B-Que Lunch
Green Lunch II
9/3/2013
Tuesday
Bar-B-Que Lunch
Bar-B-Que Lunch
9/4/2013
Wednesday
Salad Lunch
Salad Lunch
Site Name
Site Group
Effective Date
End Date
Elementary School
10/5/2011
ELEMENTARY SCHOOL
Elementary School
4/11/2012
ELEMENTARY SCHOOL
Elementary School
3/6/2013
Back
4
Assign
Menu cycle assigned successfully.
Assign Menus
Meal Type
Lunch
Site Group
Elementary School
Site
-- ALL --
Menu Line
Regular
Menu Calendar
Select Menu/Menu Cycle
Review & Confirm
Next
September 2013
S
M
T
W
T
F
S
25 Aug
26 Aug
27 Aug
28 Aug
29 Aug
30 Aug
31 Aug
1 Sep
2 Sep
Green Lunch II
3 Sep
Bar-B-Que Lunch
4 Sep
Salad Lunch
5 Sep
Sandwich Lunch
6 Sep
Fiesta Lunch
7 Sep

Three options are available on the **Review & Confirm** tab to specify how to assign the menus in the menu cycle to accommodate Holidays and Weekend Days:

- **Skip Weekends** – when selected:
  - * Menus are not assigned to weekend days (Saturday and Sunday).
  - * Unassigned ("leftover") menu(s) from the Menu Cycle are assigned to the next available date(s)
  - * *Option is selected by default*.

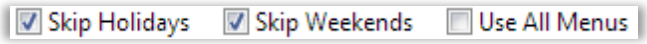
  For example

  1. If you assign Menu Cycle X which includes five (5) menus:

  2. To this week starting on Tuesday the 3rd:

Sun 1	Mon 2	**Tues 3**	Wed 4	Thurs 5	Fri 6	Sat 7
Sun 8	Mon 9	Tues 10	Wed 11	Thurs 12	Fri 13	Sat 14

  3. With these options selected:



This is how the assigned Menu Cycle X appears on the Menu Calendar:

Sun 1	Mon 2	**Tues 3** **Menu A**	Wed 4 **Menu B**	Thurs 5 **Menu C**	Fri 6 **Menu D**	Sat 7
Sun 8	Mon 9 **Menu E**	Tues 10	Wed 11	Thurs 12	Fri 13	Sat 14

Notice that **Menu E** is assigned to the next available date.

- **Skip Holidays** – when selected
  - * Menus are not assigned to days designated as holidays; holidays are set up through **Configuration > Holiday Schedule**
  - * Unassigned Menus are discarded (not assigned to the next available date)
  - * *Option is selected by default*.

For example

1. If you assign Menu Cycle X which includes five (5) menus:

2. To this calendar starting on Tuesday the 3rd:

Sun 1	Mon 2	**Tues 3**	Wed 4	Thurs 5 **Holiday**	Fri 6 **Holiday**	Sat 7
Sun 8	Mon 9	Tues 10	Wed 11	Thurs 12	Fri 13	Sat 14

3. With these options selected:

This is how the assigned Menu Cycle X appears on the Menu Calendar:

Sun 1	Mon 2	**Tues 3** **Menu A**	Wed 4 **Menu B**	Thurs 5 **Holiday**	Fri 6 **Holiday**	Sat 7
Sun 8	Mon 9 **Menu E**	Tues 10	Wed 11	Thurs 12	Fri 13	Sat 14

Menu C and **Menu D** are not assigned to any day of the selected week or any other week, i.e., they are *discarded*.

Menu E is assigned to the next available day on the Menu Calendar.

- **Use All Menus** – when selected

  * Any unassigned Menus are assigned to the next available day

  * *Option is not selected by default*.

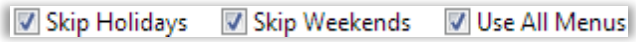
  For example

  1. If you assign Menu Cycle X which includes five (5) menus:

  2. To this calendar starting on Tuesday the 3rd :

Sun 1	Mon 2	**Tues 3**	Wed 4	Thurs 5 **Holiday**	Fri 6 **Holiday**	Sat 7
Sun 8	Mon 9	Tues 10	Wed 11	Thurs 12	Fri 13	Sat 14

  3. With these options selected:



This is how the assigned Menu Cycle X appears on the Menu Calendar:

Sun 1	Mon 2	**Tues 3** **Menu A**	Wed 4 **Menu B**	Thurs 5 **Holiday**	Fri 6 **Holiday**	Sat 7
Sun 8	Mon 9 **Menu C**	Tues 10 **Menu D**	Wed 11 **Menu E**	Thurs 12	Fri 13	Sat 14

All Menus in Menu Cycle X are assigned to a date. Compare this calendar with the calendar on the previous page to see how selecting **Use All Menus** changes the menu assignment.

- **Override Assigned Menus**—this option only appears when an existing menu will be overridden with a new menu assignment; when selected
  - * Menus currently assigned to the Menu Calendar will be replaced with new menus from the Menu Cycle being assigned.
  - * *Option is selected by default*.

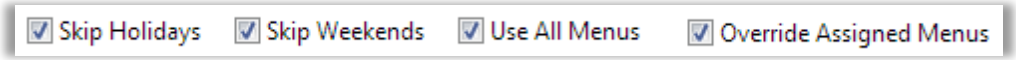
For example,

1. If you assign Menu Cycle X which includes five (5) menus:

2. To this calendar starting on Tuesday the 3rd where Menus are currently assigned to Monday the 9th through Friday the 13th:

Sun 1	Mon 2	**Tues 3**	Wed 4	Thurs 5 **Holiday**	Fri 6 **Holiday**	Sat 7
Sun 8	Mon 9 **Menu 1**	Tues 10 **Menu 2**	Wed 11 **Menu 3**	Thurs 12 **Menu 4**	Fri 13 **Menu 5**	Sat 14

3. With these options selected:



This is how the assigned week appears in the Menu Calendar:

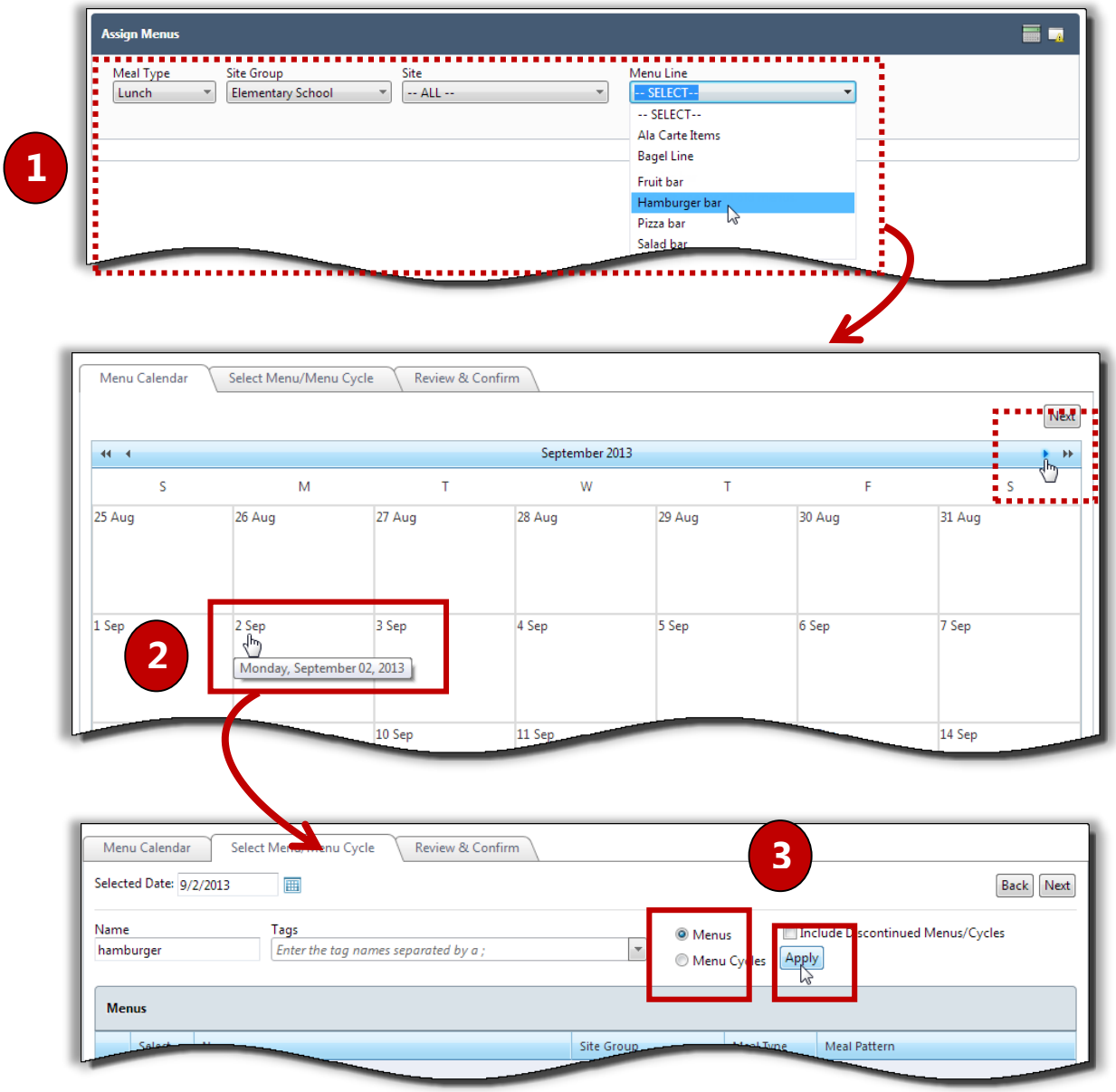
Sun 1	Mon 2	**Tues 3** **Menu A**	Wed 4 **Menu B**	Thurs 5 **Holiday**	Fri 6 **Holiday**	Sat 7
Sun 8	Mon 9 **Menu C**	Tues 10 **Menu D**	Wed 11 **Menu E**	Thurs 12 **Menu 4**	Fri 13 **Menu 5**	Sat 14

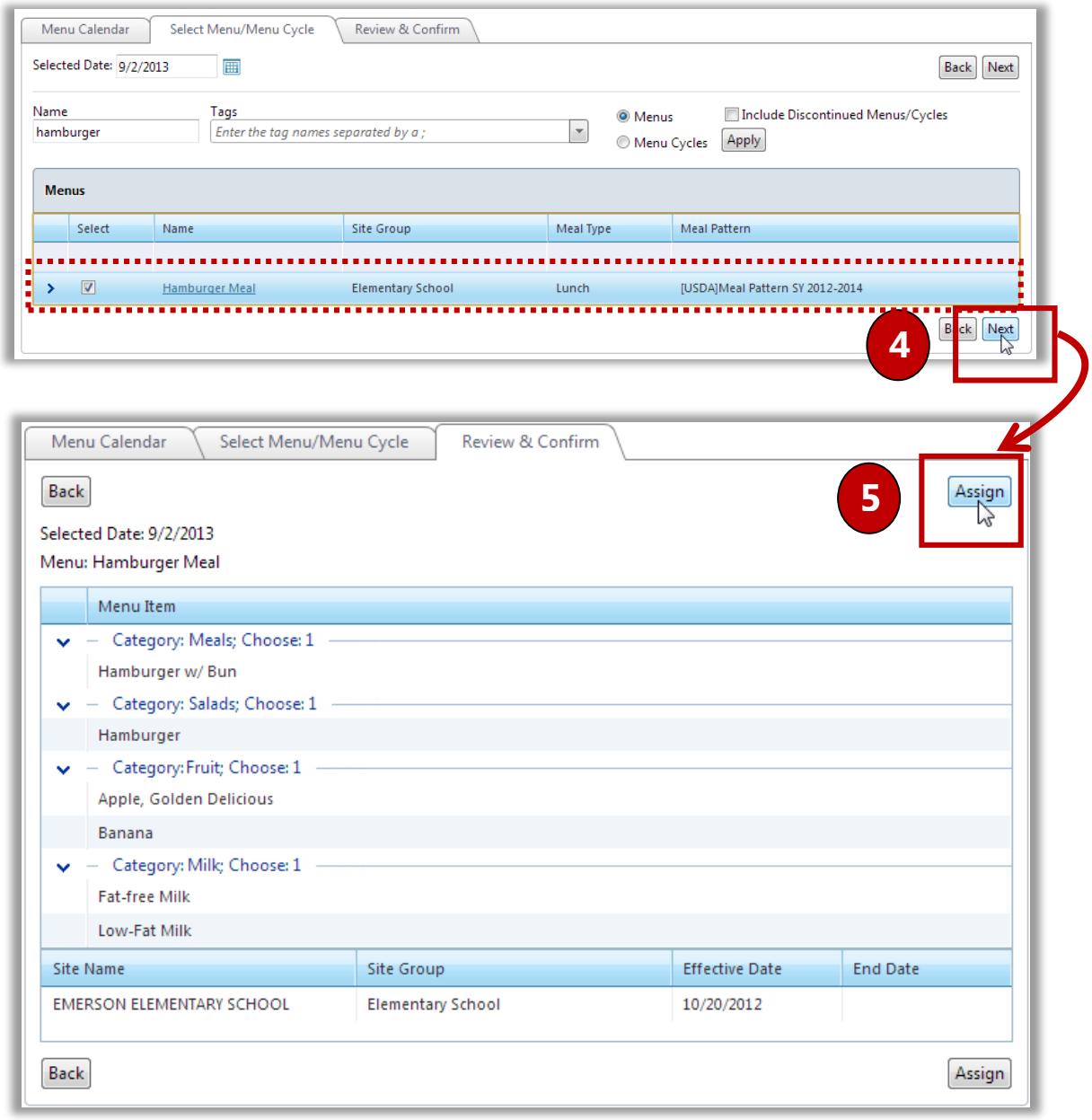
All Menus in Menu Cycle X are assigned to a date where **Menu C**, **Menu D** and **Menu E** override **Menu 1**, **Menu 2**, and **Menu 3**. Notice that **Menu 4** and **Menu 5** remain from the original assignment. Compare this calendar with the calendar on the previous page to see how selecting **Override Assigned Menus** changes the menu assignment.

Assigning a Menu

To assign a Menu

1. Select a **Meal Type** and **Site Group**, and **Menu Line**; select a **Site**, if needed.
2. Move to a different calendar month if needed and click a calendar date.
3. Click **Menus** and click Apply .
4. Select a Menu in the Menus list and click Next .
5. Review the Serving Dates on which the menus will be assigned and click Assign .



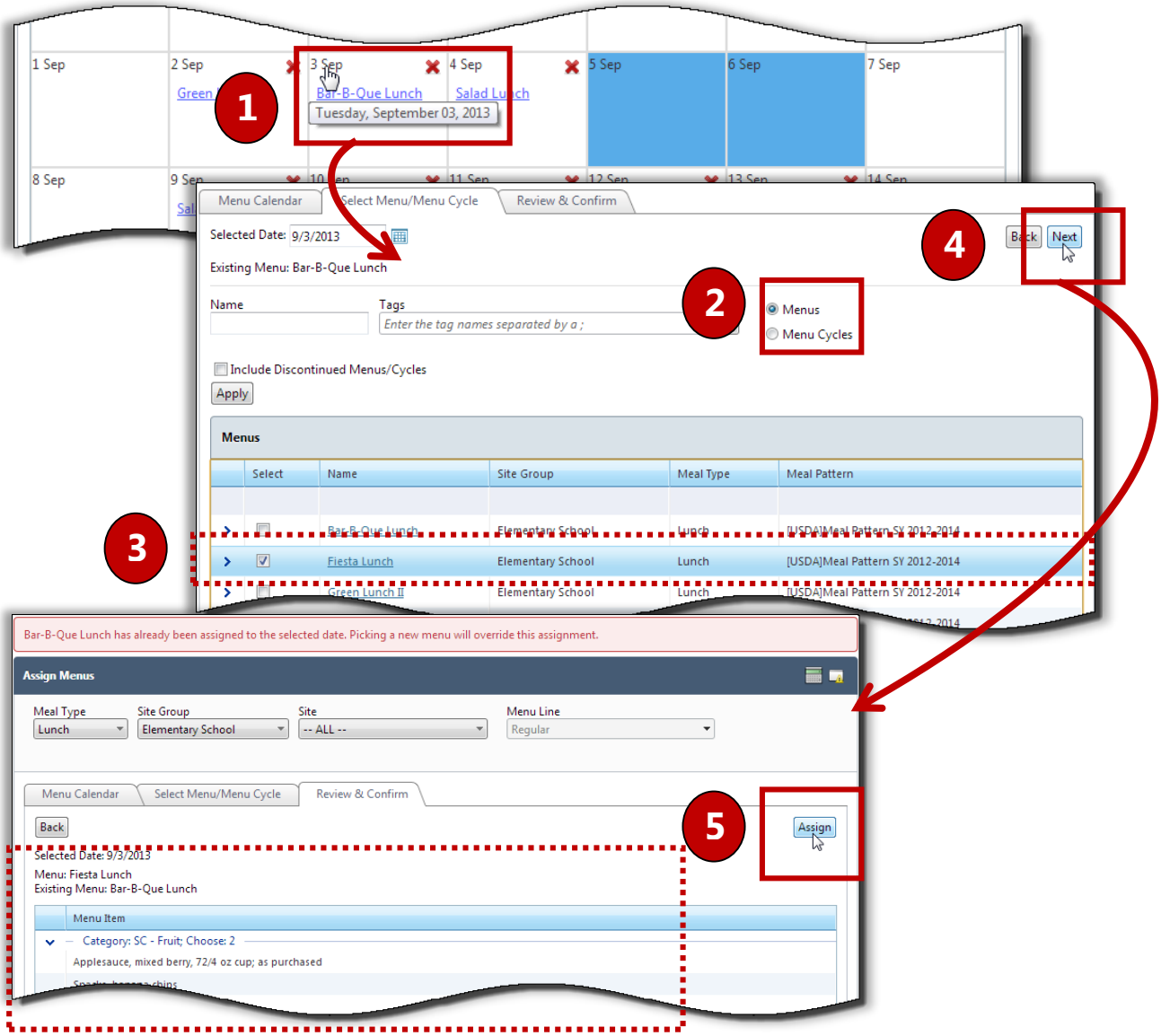

Menu Calendar
Select Menu/Menu Cycle
Review & Confirm
Selected Date: 9/2/2013
Back
Next
Name
hamburger
Tags
Enter the tag names separated by a ;
Menus
Menu Cycles
Apply
Include Discontinued Menus/Cycles
Menus
Select
Name
Site Group
Meal Type
Meal Pattern
Hamburger Meal
Elementary School
Lunch
[USDA]Meal Pattern SY 2012-2014
4
Menu Calendar
Select Menu/Menu Cycle
Review & Confirm
Back
5
Assign
Selected Date: 9/2/2013
Menu: Hamburger Meal
Menu Item
Category: Meals; Choose: 1
Hamburger w/ Bun
Category: Salads; Choose: 1
Hamburger
Category: Fruit; Choose: 1
Apple, Golden Delicious
Banana
Category: Milk; Choose: 1
Fat-free Milk
Low-Fat Milk
Site Name
Site Group
Effective Date
End Date
EMERSON ELEMENTARY SCHOOL
Elementary School
10/20/2012
Back
Assign

Replacing an Assigned Menu

Occasionally you will need to replace a menu that is currently assigned to the Menu Calendar to take advantage of new product offerings, meet new menu requirements from the USDA, or simply just to offer something new to keep your patrons interested.

To replace an assigned Menu

1. Display a menu calendar and click on the calendar date.
2. Click **Menus**.
3. Select a Menu.
4. Click Next .
5. Review the Serving Dates on which the menus will be assigned and click Assign .

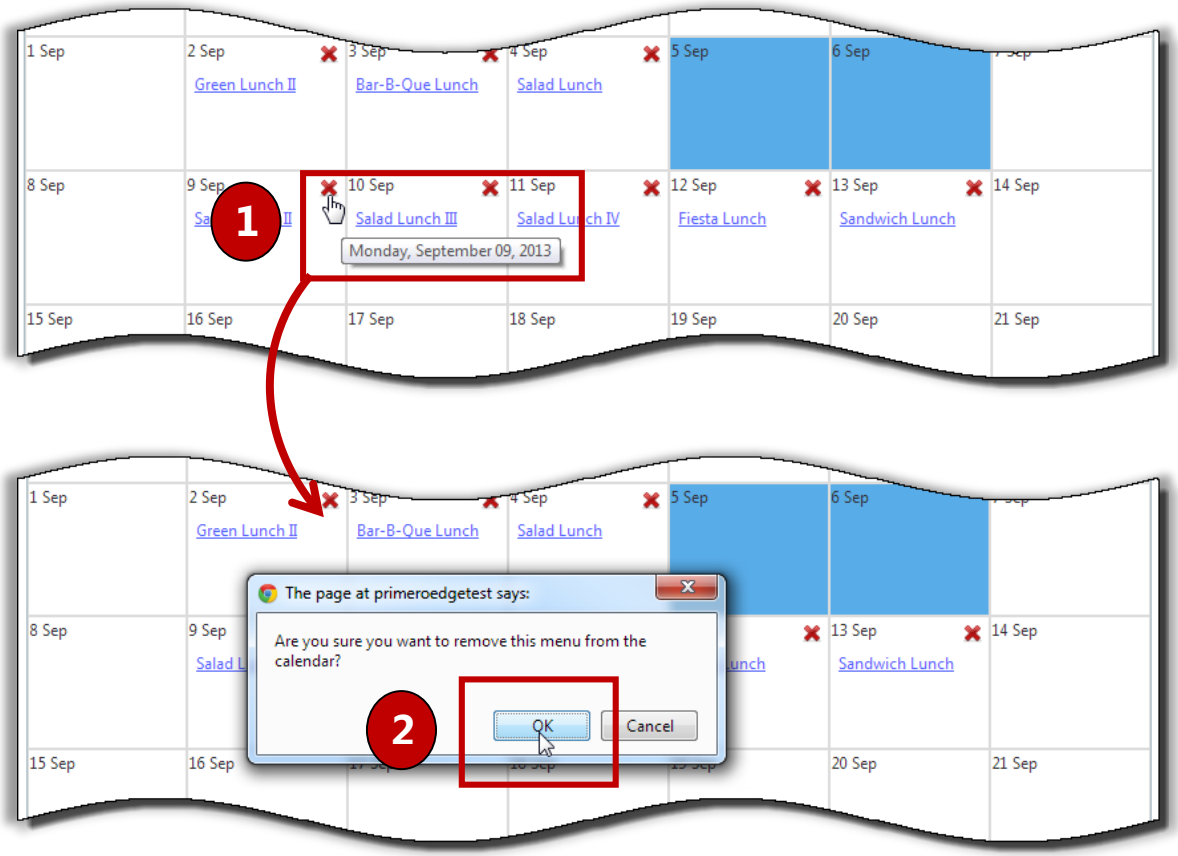


Removing an Assigned Menu

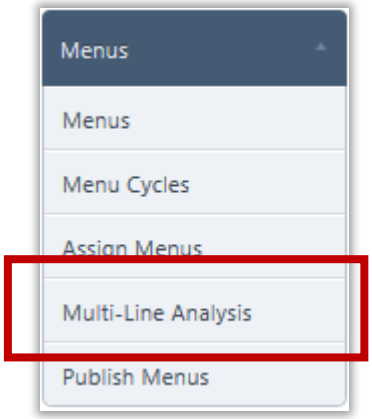
Occasionally, you will need to remove a Menu from the Menu Calendar, such as when a special event that doesn't require meal service is scheduled after the Menu Calendar has been assigned menus.

To remove an assigned Menu

1. Display a Menu Calendar and click **Delete** ( ) on the calendar day with the Menu to be removed.
2. Click OK .



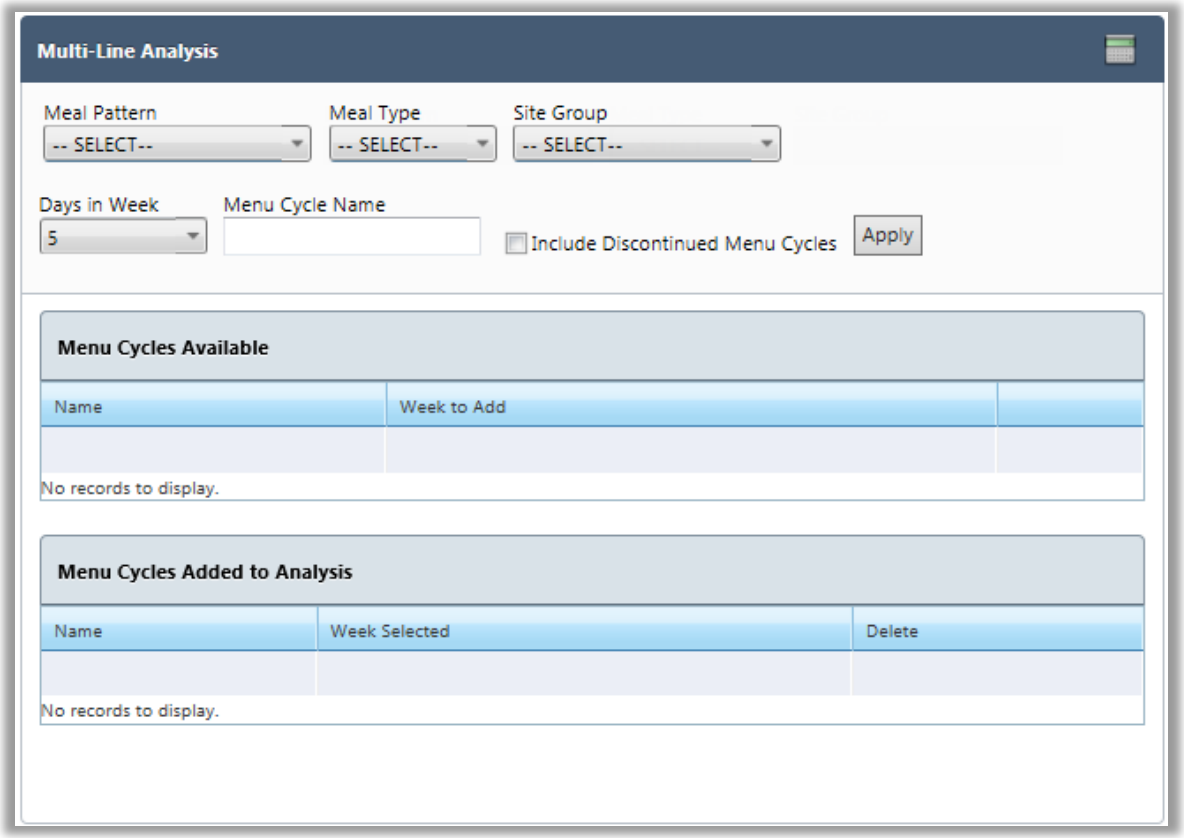
Multi-Line Analysis



In some feeding sites, multiple Production records are used/required for a single Meal Service when multiple Menu Lines are offered, such as a Lunch Meal Service that offers a Pizza Line, a Sandwich Line, a Salad Line, etc.

A patron may cross Menu Lines and make choices from more than one Menu Line. Therefore some feeding sites are required to verify that USDA ***weekly*** guidelines are met when patrons have the opportunity to make choices from multiple Menu Lines. Multi-Line Analysis performs that analysis with selected Menu Cycles.

Multi-Line Analysis Page



By default on the **Multi-Line Analysis** page:

- **Days in Week** is set to "5" (five)
- All other criteria are set to "SELECT" or are blank.

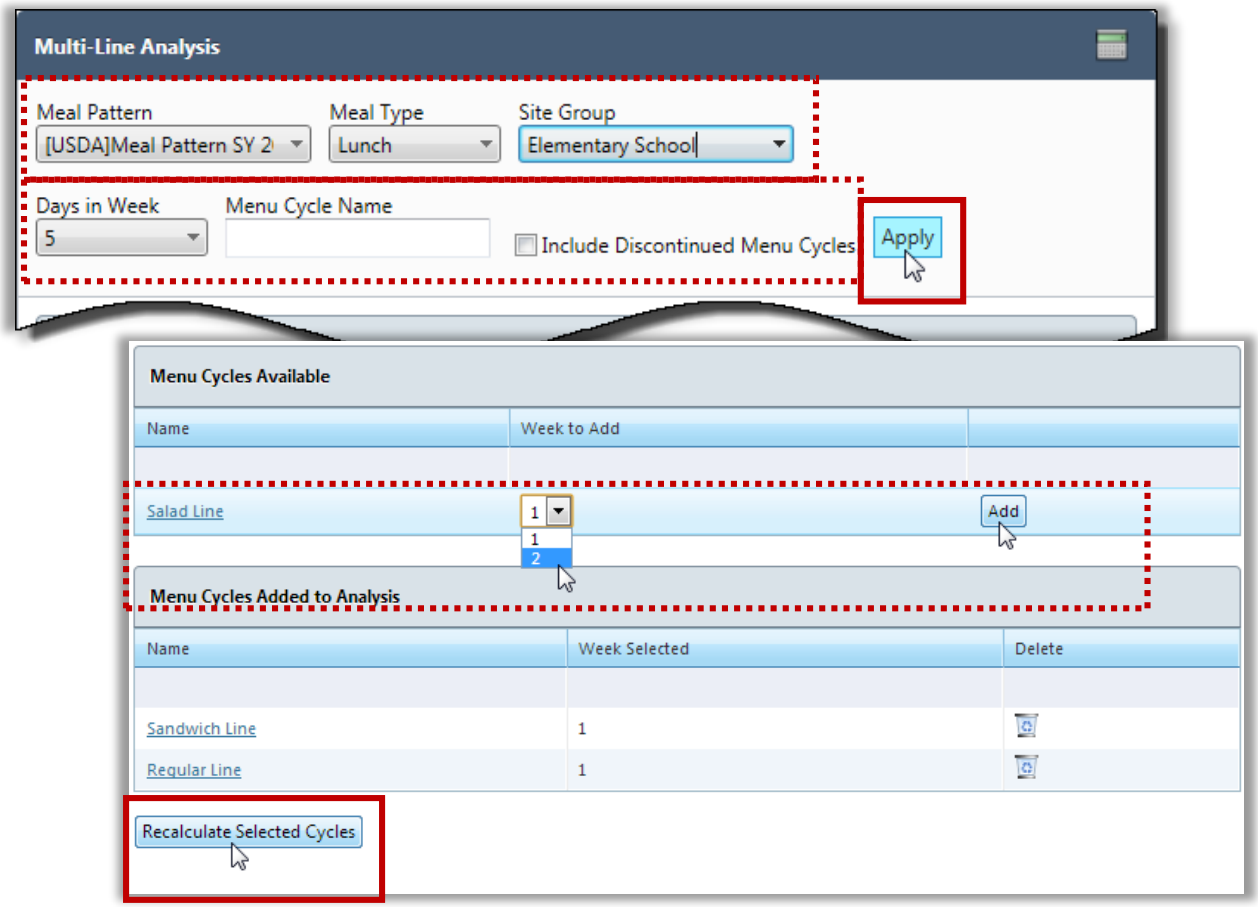
Page Functions

Button/Link	Description
Apply	Click to display all Menu Cycles in the **Available Menu Cycles** list that match the selected search conditions.

Generating a Multi-Line Analysis

To perform a Multi-Line analysis

1. Select **Meal Pattern**, **Meal Type**, and **Site Group**.
2. Change the **Days in Week**, enter a **Menu Cycle Name**, and select **Include Discontinued Menu Cycles**, if needed.
3. Click Apply
4. Click Add in each Menu Cycle listing to include in the analysis; select Menu Cycle weeks, if needed.
5. Click Recalculate Selected Cycles .



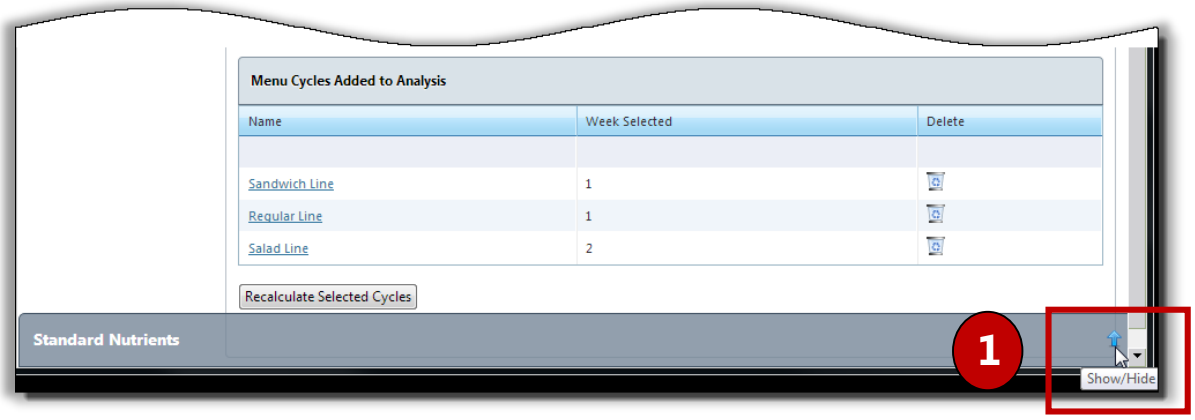
Viewing Nutrients and Food Components for a Multi-Line Analysis

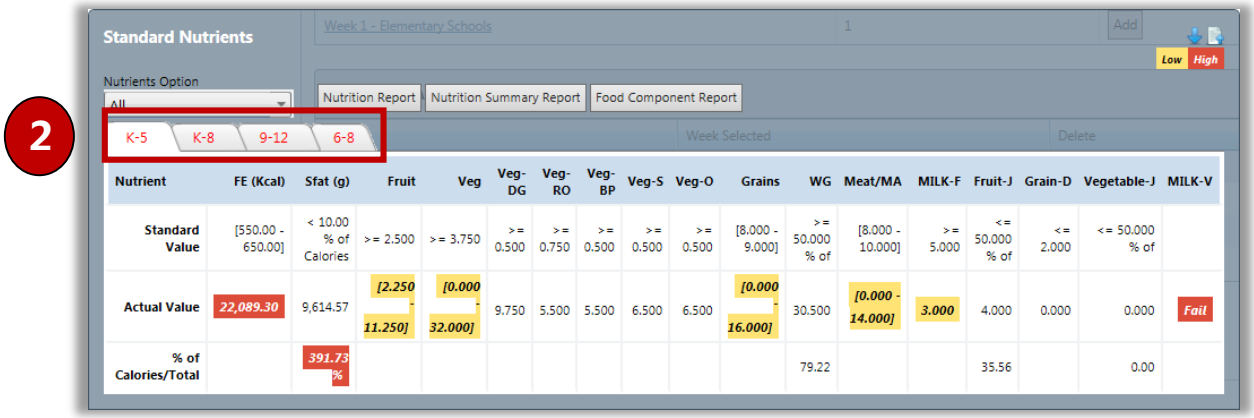
The Multi-Line Analysis display includes a Standard Nutrients footer. This footer provides one tab of nutrition information for each serving group.

- Nutrient values that fall *below* the requirements for a food component are highlighted in **yellow**.
- Nutrient values that fall *above* the maximum nutritional requirements are highlighted in **red**.
- Fail message in the **Milk-V** column indicates that the requirement for providing at least two choices (a "variety" of milks) in a meal service has not been met.

To view Standard Nutrients for a Serving Group

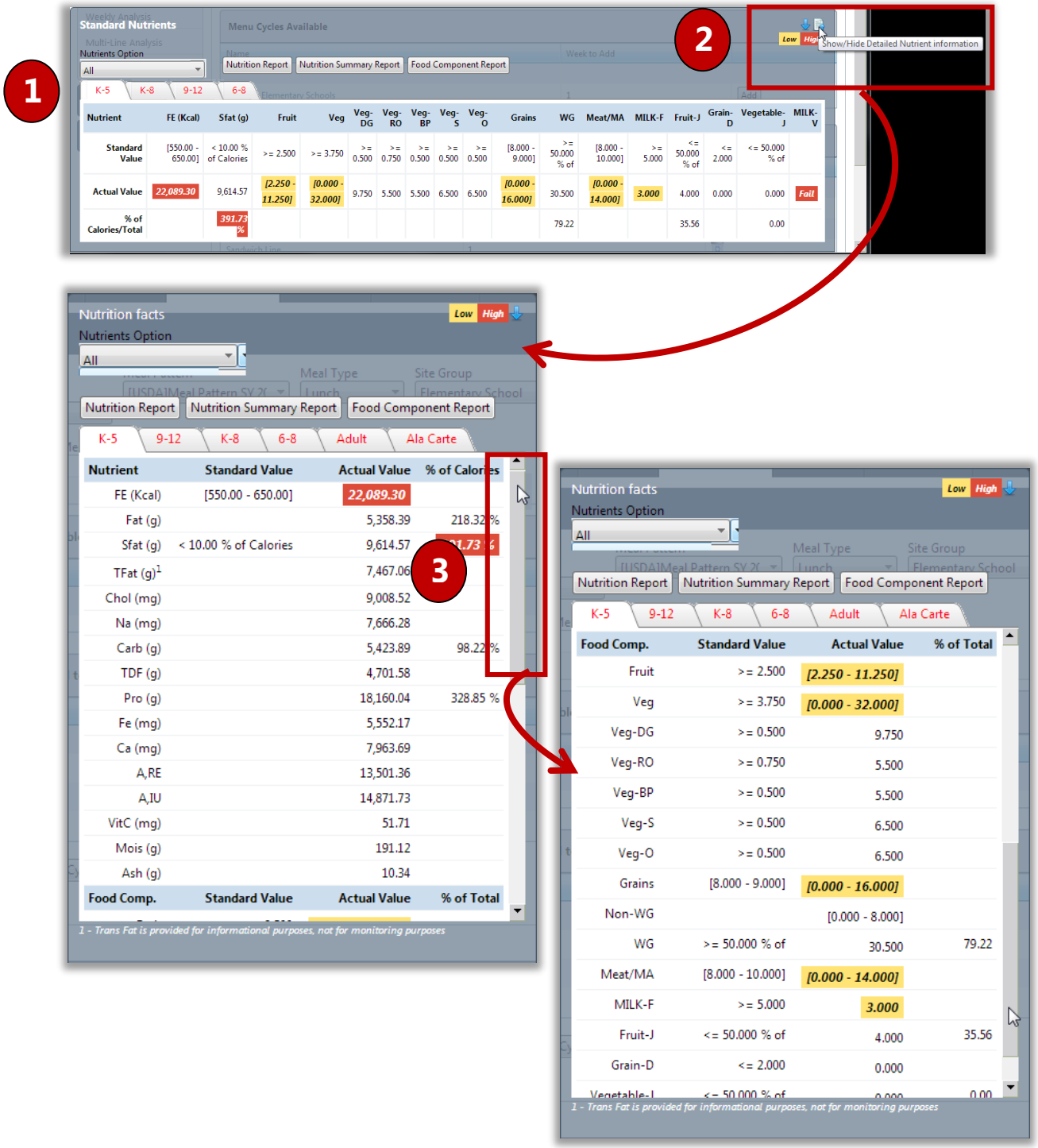
1. Click **Show/Hide Standard Nutrients Footer** ( ).
2. Click a tab to view nutrients for a different serving group.





To view Standard Nutrients details for a Serving Group

1. Display a menu and click a tab to view nutrients for a serving group.
2. Click **Show/Hide Detailed Nutrient Information** ( ).
3. Scroll to view Food Component details.



Generating a Nutrient Analysis Report with a Multi-Line Analysis

The Menu Nutrient Analysis Report displays either detailed nutrition information for all nutrients or "simplified" information that includes:

Calories Saturated Fat Calcium

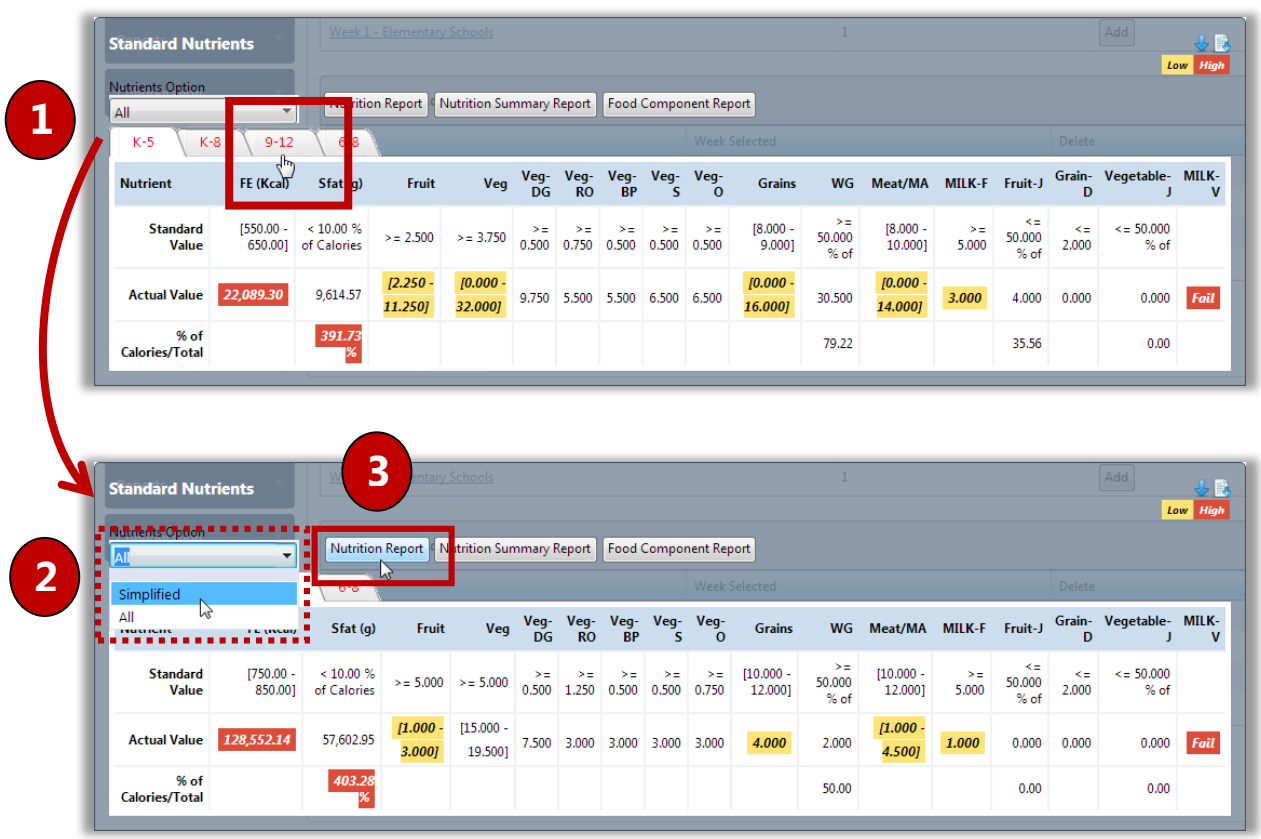
The default selection is "All" which is set through the **Default Nutrients Option** system setting.

Highlighted report values include

- Nutrient values that fall *below* the requirements for a food component are highlighted in **yellow**.
- Nutrient values that fall *above* the maximum nutritional requirements are highlighted in **red**.
- Fail message in the **Milk-V** column indicates that the requirement for providing at least two choices (a "variety" of milks) in each meal service has not been met.

To view Standard Nutrient details for a Serving Group

1. Display the Standard Nutrients footer for a menu and select a serving group.
2. Select a Nutrient Option.
3. Click Nutrition Report .



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1 of 2 100% Find | Next

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Menu Cycle Week Nutrient Analysis Report

Simplified Nutrients Option

Menu Cycle Name - Regular Line - Week 1, Salad Line - Week 2, Sandwich Line - Week 1

Site Group - Middle School

Serving Group - K-8

Meal Type - Lunch

Meal Pattern - [USDA]Meal Pattern SY 2012-2014

Calculation Method - Weighted Analysis

Result - Fail

Cycle Week Nutrient Summary

Nutrient	Weekly Standard Value	Actual Value	% of Calories
FE (Kcal)	[600.00 - 650.00]	128,115.63	
Sfat (g)	< 10.00 % of Calories	57,601.52	404.65
Na (mg)		41,152.86	

Cycle Week Food Component Summary

Food Component	Standard Value	Actual Value	% of Total
Fruit	>= 2.500	[2.000 - 4.500]	
Veg	>= 3.750	[0.000 - 6.500]	
Veg-DG	>= 0.500	5.500	
Veg-RO	>= 0.750	0.500	
Veg-BP	>= 0.500	0.500	
Veg-S	>= 0.500	0.000	
Veg-O	>= 0.500	0.000	
Grains	[8.000 - 9.000]	0.000	
Non-WG		0.000	
WG	>= 50.000 % of	0.000	
Meat/MA	[9.000 - 10.000]	[1.000 - 5.500]	
MILK-F	>= 5.000	1.000	
Fruit-J	<= 50.000 % of	0.000	0.00
Grain-D	<= 2.000	0.000	
Vegetable-J	<= 50.000 % of	0.000	0.00
MILK-V		Fail	

Legend

(M) - Missing Nutrient Values

Item Name (Serving Size)	Plan Qty	FE (Kcal)	Sfat (g)	Na (mg)
Green Lunch II - Day: 1	100			
Category: SC - Fruit; Choose: 2				
Applesauce, mixed berry, 72/4 oz cup; as purchased - LR300063 (4 oz.)	0	89.99	-M-	
Strawberries, raw - LR300062 (1 CN-CUP, ha)	0	48.64	0.02	1
Category: SC - Milk; Choose: 1				

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1 of 2 100% Find | Next

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Menu Cycle Week Nutrient Analysis Report

"All" Nutrients Option

Menu Cycle Name - Regular Line - Week 1, Salad Line - Week 2, Sandwich Line - Week 1

Site Group - Middle School

Serving Group - K-8

Meal Type - Lunch

Meal Pattern - [USDA]Meal Pattern SY 2012-2014

Calculation Method - Weighted Analysis

Result - Fail

Cycle Week Nutrient Summary

Nutrient	Weekly Standard Value	Actual Value	% of Calories
FE (Kcal)	[600.00 - 650.00]	128,115.63	
Fat (g)		32,003.07	224.82
Sfat (g)	< 10.00 % of Calories	57,601.52	404.65
TFat (g)(1)		44,800.03	
Chol (mg)		53,765.11	
Na (mg)		41,152.86	
Carb (g)		32,015.87	99.96
TDF (g)		28,161.88	
		108,803.15	339.70
		33,283.76	
		46,176.43	
A,RE		79,489.16	
A,IU		81,291.98	
VitC (mg)		8.70	
Mois (g)		5.66	
Ash (g)		2.31	

Cycle Week Food Component Summary

Food Component	Standard Value	Actual Value	% of Total
Fruit	>= 2.500	[2.000 - 4.500]	
Veg	>= 3.750	[0.000 - 6.500]	
Veg-DG	>= 0.500	5.500	
Veg-RO	>= 0.750	0.500	
Veg-BP	>= 0.500	0.500	
Veg-S	>= 0.500	0.000	
Veg-O	>= 0.500	0.000	
Grains	[8.000 - 9.000]	0.000	
Non-WG		0.000	
WG	>= 50.000 % of	0.000	
Meat/MA	[9.000 - 10.000]	[1.000 - 5.500]	
MILK-F	>= 5.000	1.000	
Fruit-J	<= 50.000 % of	0.000	0.00
Grain-D	<= 2.000	0.000	
Vegetable-J	<= 50.000 % of	0.000	0.00
MILK-V		Fail	

Legend

(M) - Missing Nutrient Values

1 Trans Fat is provided for informational purposes, not for monitoring purposes

Item Name (Serving Size)	Plan Qty	FE (Kcal)	Fat (g)	Sfat (g)	TFat (g)	Chol (mg)	Na (mg)	Carb (g)	TDF (g)	Sugar (g)	Pro (g)	Fe (mg)	Ca (mg)	A,RE	A,IU	VitC (mg)	Mois (g)	Ash (g)
Green Lunch II - Day: 1	100																	
Category: SC - Fruit; Choose: 2																		
Applesauce, mixed berry, 72/4 oz cup; as purchased - LR300063 (4 oz.)	0	89.99	-M-	-M-	-M-	-M-	-M-	21.99	0.99	-M-	-M-	-M-	20.00	-M-	-M-	1.20	89.99	0.60
Strawberries, raw - LR300062 (1 CN-CUP, ha)	0	48.64	0.46	0.02	-M-	-M-	1.52	11.67	3.04	-M-	1.02	0.62	24.32	4.56	18.24	89.38	138.24	0.61

Page: 1 of 2

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1 of 6 100% Find | Next

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Menu Cycle Week Nutrient Analysis Report

[redacted] COUNTY

Menu Cycle Name - Regular Line - Week 1, Sandwich Line - Week 1, Salad Line - Week 2

Site Group - Middle School

Meal Pattern - [USDA]Meal Pattern SY 2012-2014

Serving Group - K-5

Calculation Method - Weighted Analysis

Meal Type - Lunch

Result - Fail

Cycle Week Nutrient Summary

Nutrient	Weekly Standard Value	Actual Value	% of Calories
FE (Kcal)	[550.00 - 650.00]	69,021.99	
Fat (g)		17,091.71	222.86
Sfat (g)	< 10.00 % of Calories	30,734.57	400.76
Na (mg)		22,684.61	
Carb (g)		17,157.20	99.43
Pro (g)		58,053.35	336.43

Cycle Week Food Component Summary

Food Component	Standard Value	Actual Value	% of Total
Fruit	>= 2.500	[2.250 - 12.250]	
Veg	>= 3.750	[0.000 - 32.000]	
Veg-DG	>= 0.500	9.750	
Veg-RO	>= 0.750	5.500	
Veg-BP	>= 0.500	5.500	
Veg-S	>= 0.500	6.500	
Veg-O	>= 0.500	6.500	
Grains	[8.000 - 9.000]	[0.000 - 16.000]	
Non-WG		[0.000 - 8.000]	
WG	>= 50.000 % of	31.500	79.75
Meat/MA	[8.000 - 10.000]	[0.000 - 14.000]	
MILK-F	>= 5.000	3.000	
Fruit-J	<= 50.000 % of	4.000	32.65
Grain-D	<= 2.000	0.000	
Vegetable-J	<= 50.000 % of	0.000	0.00
MILK-V		Fail	

Legend

(M) - Missing Nutrient Values

Item Name (Serving Size)	Plan Qty	FE (Kcal)	Fat (g)	Sfat (g)	Na (mg)	Carb (g)	Pro (g)
Copy1 of 11 th Demo menu2 - Day: 1	5						
Category: WOOD -Meals; Choose: 1							
3.6 oz Precooked Breaded Fish Portions - LR100210 (3 5/8 oz.)	0	193.80	8.16	0.51	316.20	17.34	14.28
Artesian Water - LR100100 (1)	0	-M-	-M-	-M-	-M-	-M-	-M-
FC-Dual entry form of curry pu - LR100195 (3 ea.)	0	236.13	5.70	1.07	288.06	10.83	4.51

"Expanded" Nutrients Option

Page: 1 of 6

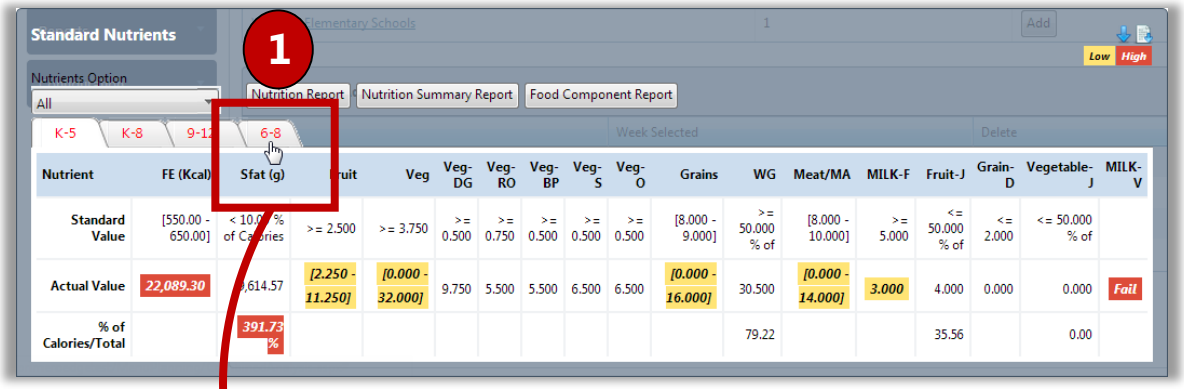
Generating a Nutrition Summary Report with a Multi-Line Analysis

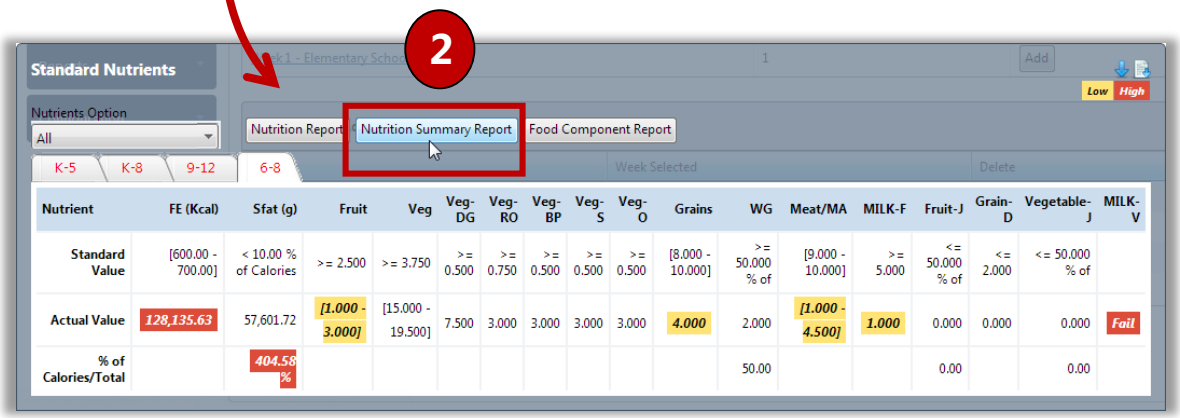
The Menu Cycle Week Nutrient Summary Report displays the daily totals, the average daily value (Actual Value), and the percentage of total weekly calories for each nutrient.

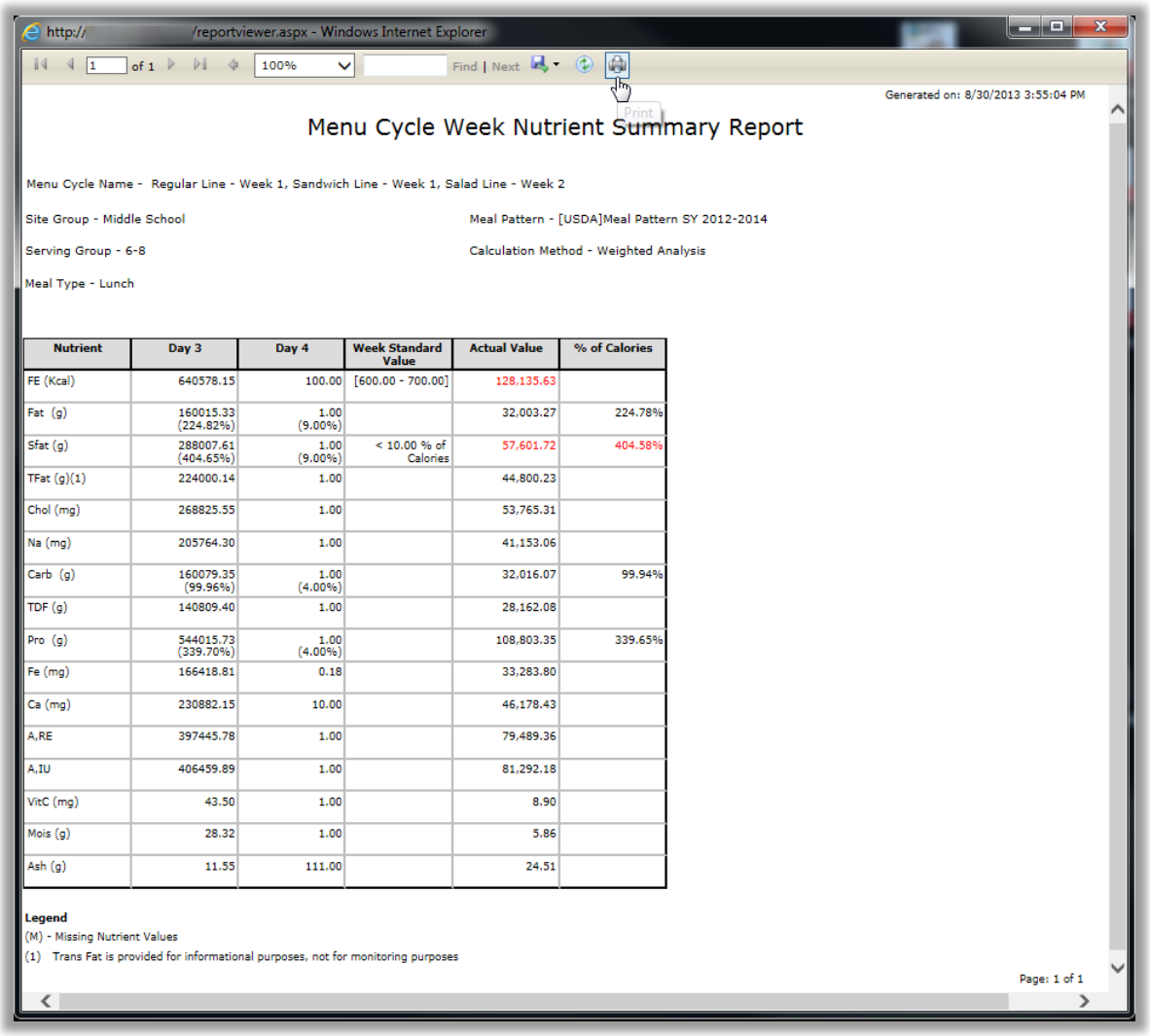
- Weekly calorie values that fall *outside* (above or below) the weekly requirements are shown in **red** in **Actual Value**.
- Saturated Fat values that fall *below* the weekly requirements are shown in ***green*** in **Actual Value** and **% of Calories**.

To view the Menu Cycle Week Nutrient Summary Report for a Serving Group

1. Display the Standard Nutrients footer for a multi-line analysis and select a Serving Group, if needed.
2. Click Nutrition Summary Report .







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Menu Cycle Week Nutrient Summary Report

Menu Cycle Name - Regular Line - Week 1, Sandwich Line - Week 1, Salad Line - Week 2

Site Group - Middle School

Meal Pattern - [USDA]Meal Pattern SY 2012-2014

Serving Group - 6-8

Calculation Method - Weighted Analysis

Meal Type - Lunch

Nutrient	Day 3	Day 4	Week Standard Value	Actual Value	% of Calories
FE (Kcal)	640578.15	100.00	[600.00 - 700.00]	128,135.63	
Fat (g)	160015.33 (224.82%)	1.00 (9.00%)		32,003.27	224.78%
Sfat (g)	288007.61 (404.65%)	1.00 (9.00%)	< 10.00 % of Calories	57,601.72	404.58%
TFat (g)(1)	224000.14	1.00		44,800.23	
Chol (mg)	268825.55	1.00		53,765.31	
Na (mg)	205764.30	1.00		41,153.06	
Carb (g)	160079.35 (99.96%)	1.00 (4.00%)		32,016.07	99.94%
TDF (g)	140809.40	1.00		28,162.08	
Pro (g)	544015.73 (339.70%)	1.00 (4.00%)		108,803.35	339.65%
Fe (mg)	166418.81	0.18		33,283.80	
Ca (mg)	230882.15	10.00		46,178.43	
A,RE	397445.78	1.00		79,489.36	
A,IU	406459.89	1.00		81,292.18	
VitC (mg)	43.50	1.00		8.90	
Mois (g)	28.32	1.00		5.86	
Ash (g)	11.55	111.00		24.51	

Legend

(M) - Missing Nutrient Values

(1) Trans Fat is provided for informational purposes, not for monitoring purposes

Page: 1 of 1

Generating a Weekly Food Component Report with a Multi-Line Analysis

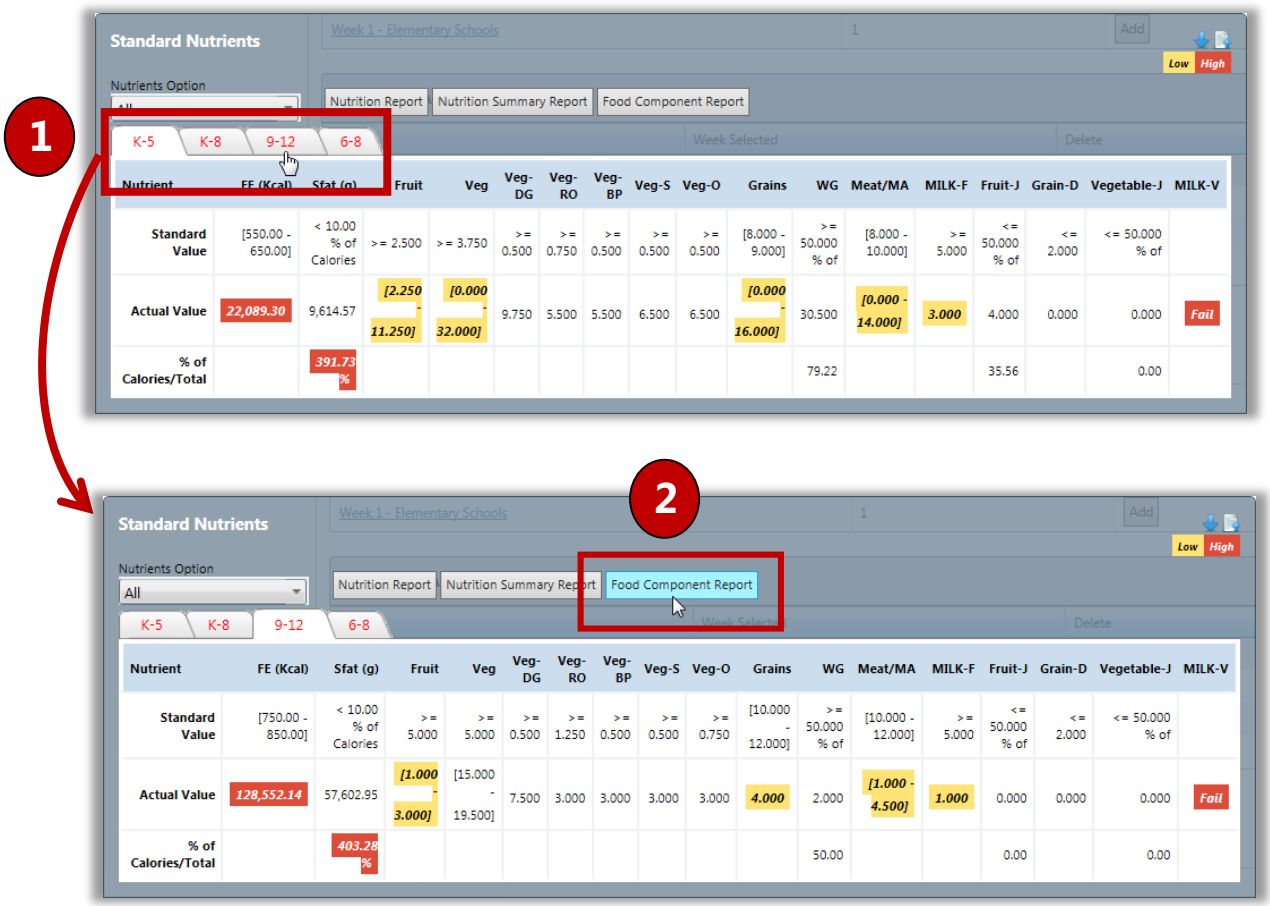
The Weekly Food Component Report displays daily values and weekly totals for each required food component along with a Pass / Fail weekly check for component requirements. Details of component sub-categories appear below the component summary information, such as Dark Green, Red/Orange, etc., for the Vegetables component.

Highlighted report values include

- Nutrient values that fall *below* the requirements for a food component are highlighted in **yellow**.
- Nutrient values that fall *above* the maximum nutritional requirements are highlighted in **red**.
- Fail message in the **Milk-V** column indicates that the requirement for providing at least two choices (a "variety" of milks) in each meal service has not been met.

To view Standard Nutrient details for a Serving Group

1. Display the Standard Nutrients footer for a menu and select a serving group.
2. Click Food Component Report .



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Weekly Food Component Report

COUNTY

Menu Cycle Name - Regular Line - Week 1, Sandwich Line - Week 1, Salad Line - Week 2

Site Group - Elementary School

Meal Pattern - [USDA]Meal Pattern SY 2012-2014

Serving Group - K-5

Meal Type - Lunch

Fruit (cups)	Day 1	Day 2	Day 3	Day 4	Day 5	Weekly Total	Weekly Requirement	Weekly Requirement Check
Minimum Fruits (cups)	[0.000 - 2.500] (Fail)	[0.000 - 2.500] (Fail)	[0.000 - 2.500] (Fail)	[1.000 - 1.750] (Pass)	[1.250 - 3.000] (Pass)	[2.250 - 12.250]	≥ 2.500	Fail

Weekly Fruit Juice Limit Requirement	Total Weekly Fruit	Total Weekly Fruit Juice	Percent of Total Weekly Fruit that is Juice	Weekly Requirement Check
≤ 50.000 % of	12.250	4.000	32.653%	Pass

Vegetables (cups)	Day 1	Day 2	Day 3	Day 4	Day 5	Weekly Total	Weekly Requirement	Weekly Requirement Check
Vegetables (cups)	[0.000 - 10.000] (Fail)	0.000 (Fail)	[0.000 - 4.500] (Fail)	[0.000 - 15.000] (Fail)	[0.000 - 2.500] (Fail)	[0.000 - 32.000]	≥ 3.750	Fail
Dark Green	2.000	0.000	4.500	3.000	0.250	9.750	≥ 0.500	Pass
Red/Orange	2.000	0.000	0.250	3.000	0.250	5.500	≥ 0.750	Pass
Beans/Peas (Legumes)	2.000	0.000	0.000	3.000	0.500	5.500	≥ 0.500	Pass
Starchy	2.000	0.000	0.500	3.000	1.000	6.500	≥ 0.500	Pass
Other	2.000	0.000	0.250	3.000	1.250	6.500	≥ 0.500	Pass

Weekly Vegetable Juice Limit Requirement	Total Weekly Vegetables	Total Weekly Vegetable Juice	Percent of Total Weekly Vegetables that is Juice	Weekly Requirement Check
≤ 50.000 % of	32.000	0.000	0.000%	Pass

Meat / Meat Alternate (oz eq.)	Day 1	Day 2	Day 3	Day 4	Day 5	Weekly Total	Weekly Requirement	Weekly Requirement Check
Meat/Meat Alternates (oz eq.)	[0.000 - 4.000] (Fail)	[0.000 - 2.500] (Fail)	[0.000 - 3.500] (Fail)	[0.000 - 2.000] (Fail)	[0.000 - 2.000] (Fail)	[0.000 - 14.000]	[8.000 - 10.000]	Fail

Grains (oz eq.)	Day 1	Day 2	Day 3	Day 4	Day 5	Weekly Total	Weekly Requirement	Weekly Requirement Check
Grains (oz eq.)	[0.000 - 6.000] (Fail)	[0.000 - 2.000] (Fail)	[0.000 - 2.000] (Fail)	[0.000 - 4.000] (Fail)	[0.000 - 2.000] (Fail)	[0.000 - 16.000]	[8.000 - 9.000]	Fail

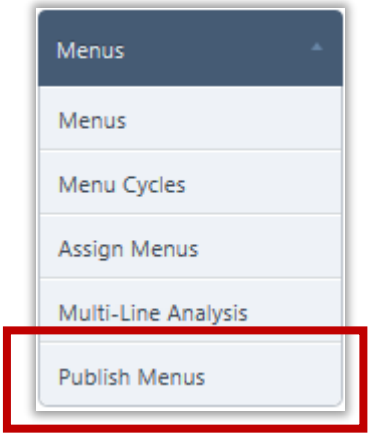
Weekly Whole Grain Rich	Weekly Grains Total	Weekly Whole Grain Rich Total	Percent of Whole Grain Rich	At Least Half Whole Grain Rich	Grain Based Dessert Total for All Weekly Meals	No More Than 2oz eq. of Grain Based Desserts
≥ 50.000 % of	39.500	31.500	79.747%	Pass	0.000	Pass

Page: 1 of 1

Milk (cups)	Day 1	Day 2	Day 3	Day 4	Day 5	Weekly Total	Weekly Requirement	Weekly Requirement Check
Minimum Fluid Milk (cups)	1.000 (Pass)	0.000 (Fail)	0.000 (Fail)	1.000 (Pass)	1.000 (Pass)	3.000	≥ 5.000	Fail

*USDA is offering flexibility for SY 2012-2013 and SY 2013-2014 by allowing SFAs to exceed the maximum amount of grains and meat/meat meal alternates as long as the daily and weekly minimums for these components are met and the calories are within the required range. If you exceed the weekly maximum for grain and/or meat/meat alternates, your report will say that you fail for those categories, but that is acceptable at this time.

Publish Menus

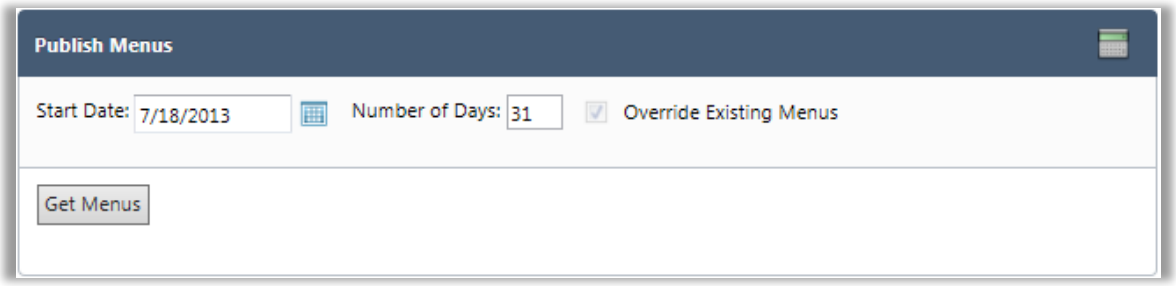


Publish Menus allows the Menu Planner to place one or more days of assigned menus on the Parent Online web site. This in turn allows parents to view menus scheduled for their child's school.

Limited menu details are provided after menu retrieval and before copying the menus to Parent Online.

By default, existing Menus for the selected date(s) are over written.

Publish Menus Page



By default on the **Publish Menus** page:

- **Start Date** is set to the current date.
- **Number of Days** is set to "31" (thirty one).
- **Override Existing Menus** is selected and unavailable.

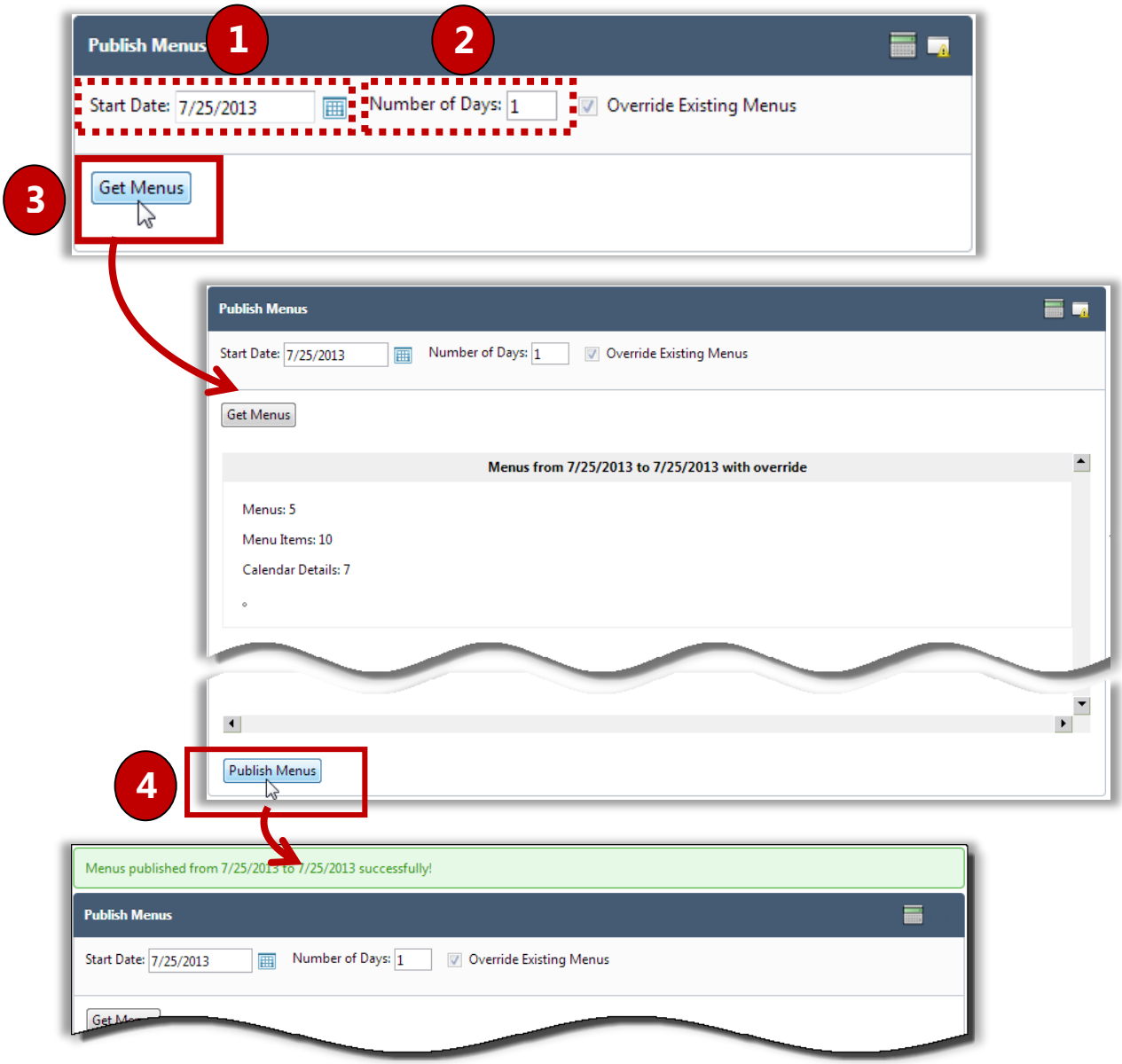
Page Functions

Button/Link	Description
Apply	Click to display all recipe records in the **Recipe List** that match the set search conditions.

Publishing Menus to Parent Online

To publish Menus to Parent Online

1. Enter or select the first date of menus to publish in **Start Date**.
2. Enter the total **Number of Days** to publish.
3. Click Get Menus .
4. Click Publish Menus .



End of Section

4 Reports

In this chapter you will learn:

- ✓ Generate a report of menu items served for a selected month.
- ✓ Generate a report of menu item nutrients served for a selected month.
- ✓ Generate a report listing nutrient information for a selected set of ingredients.
- ✓ Generate a report listing nutrient information for a single serving of a recipe.
- ✓ Generate a report listing nutrient information for selected nutrients for a Serving Group.
- ✓ Generate a report listing current nutrient standards for each serving group in a selected Meal Pattern.
- ✓ Generate a report of all planned counts for menu items.

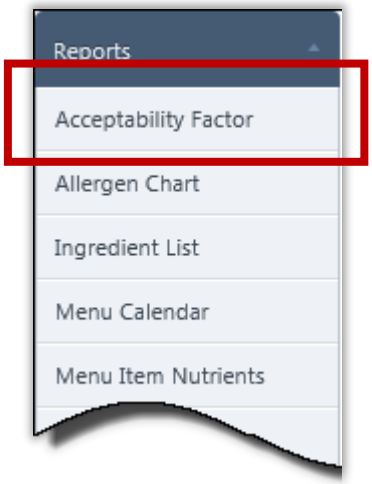
Reports at a Glance

Menu Function	Description
Acceptability Factor	Generates a report of all planned counts for menu items.
Allergen Chart	Displays a list of all allergens found in all Menu Items included on Menus for a selected date range.
Ingredient List	Generates a report of nutrients for a selected set of ingredients identified by tags, data source, and either "As Purchased" or "As Served".
Menu Calendar	Generates one of two reports: ▪ Menu Calendar – report of menu items served for a selected month ▪ Menu Calendar – report of nutrients of menu items served for a selected month
Menu Item Nutrients	Generates a report of selected nutrients for a selected data source, Meal Pattern and Serving Group.
Nutrient Standards	Generates a report of all current nutrient standards or requirements for each Serving Group in a selected Meal Pattern.
Recipe Book	Prints all recipes for a selected data source; recipes are ordered by recipe code; each recipe starts on a new page and provides detailed nutrient information.
Recipe Costing Report	Generates a report of all recipes for the district and provides serving size, number of servings, and cost per serving dollar number.
Recipe Nutrition	Generates a report of nutrient information for one (1) serving and 100 gm of a selected recipe.
Weekly Nutrient Analysis	Generates the Standard Nutrient footer for a Menu or Menu Cycle; nutrient values and food component counts can be viewed; Nutrient Analysis Report can be generated for a Menu or Menu Cycle; Food Component Report can be generated for a Menu Cycle.

Note

Menus and functions to which you have access are those appropriate for your role with PrimeroEdge. When you access the **Reports** menu, you may see a subset of the functions listed above.

Acceptability Factor



Acceptability Factor Page

Acceptability Factor provides aggregate information on planned counts for all menu items to assist the nutritionist in setting weighted counts.

This report lists all menu items served for a selected date range. Planned counts, Meal counts, Serving Size and Menu Item Category are listed for each menu item.

The report can be printed or exported to one of seven formats: XML, CVS, PDF, MHTL, TIFF, Excel or Word.

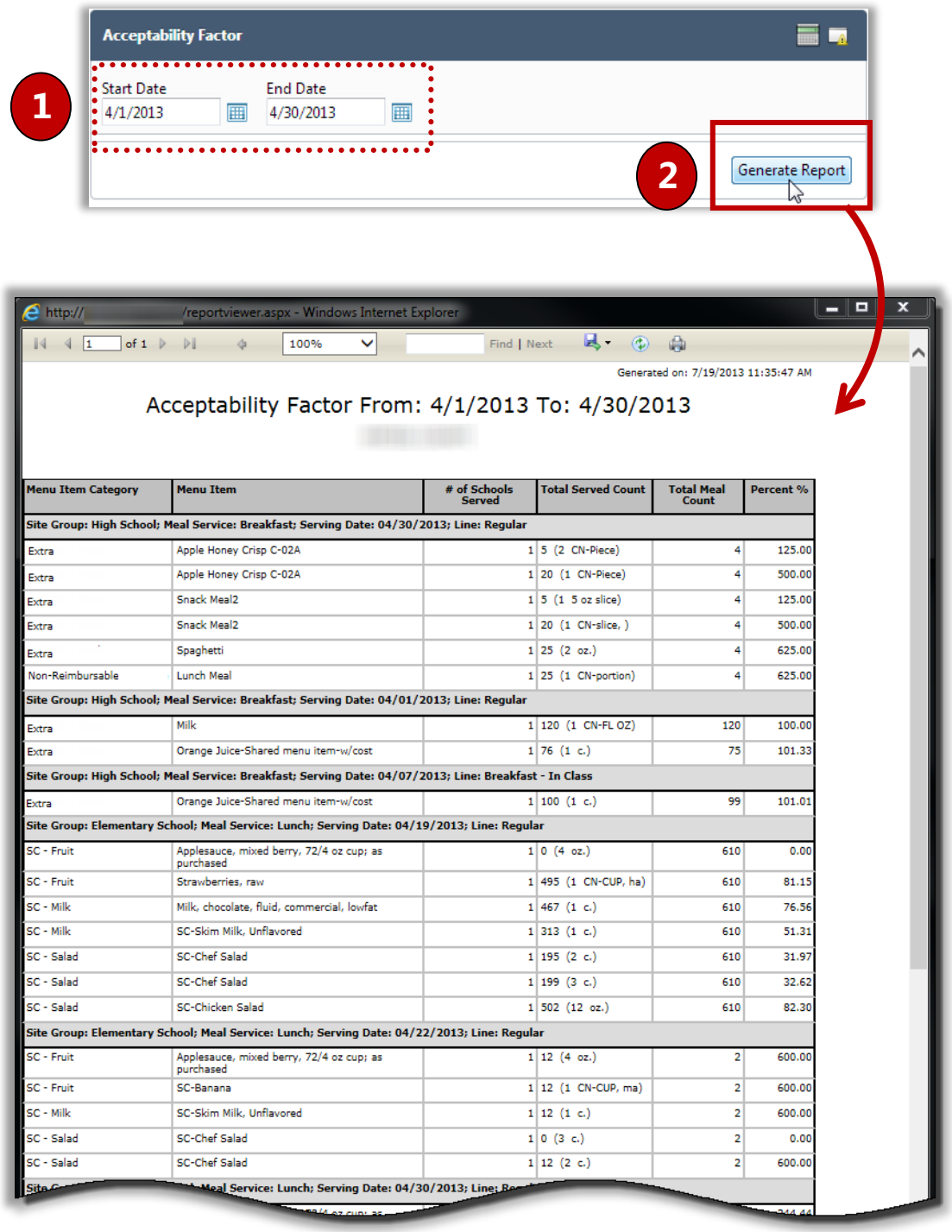
By default on the **Acceptability Factor** page

- **Start Date** is 30 days prior to the current date.
- **End Date** is the current date.

Generating an Acceptability Factor Report

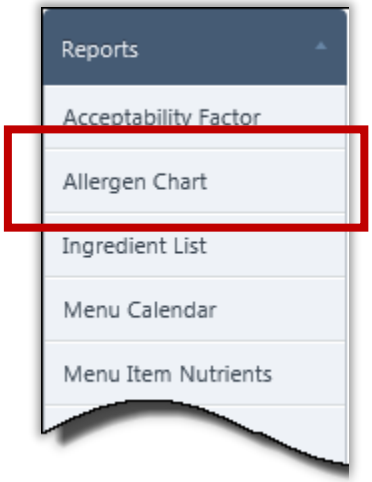
To generate an Acceptability Factor report

1. Select or enter a **Start Date** and an **End Date**.
2. Click Generate Report .



Menu Item Category	Menu Item	# of Schools Served	Total Served Count	Total Meal Count	Percent %
Site Group: High School; Meal Service: Breakfast; Serving Date: 04/30/2013; Line: Regular					
Extra	Apple Honey Crisp C-02A	1	5 (2 CN-Piece)	4	125.00
Extra	Apple Honey Crisp C-02A	1	20 (1 CN-Piece)	4	500.00
Extra	Snack Meal2	1	5 (1 5 oz slice)	4	125.00
Extra	Snack Meal2	1	20 (1 CN-slice,)	4	500.00
Extra	Spaghetti	1	25 (2 oz.)	4	625.00
Non-Reimbursable	Lunch Meal	1	25 (1 CN-portion)	4	625.00
Site Group: High School; Meal Service: Breakfast; Serving Date: 04/01/2013; Line: Regular					
Extra	Milk	1	120 (1 CN-FL OZ)	120	100.00
Extra	Orange Juice-Shared menu item-w/cost	1	76 (1 c.)	75	101.33
Site Group: High School; Meal Service: Breakfast; Serving Date: 04/07/2013; Line: Breakfast - In Class					
Extra	Orange Juice-Shared menu item-w/cost	1	100 (1 c.)	99	101.01
Site Group: Elementary School; Meal Service: Lunch; Serving Date: 04/19/2013; Line: Regular					
SC - Fruit	Applesauce, mixed berry, 72/4 oz cup; as purchased	1	0 (4 oz.)	610	0.00
SC - Fruit	Strawberries, raw	1	495 (1 CN-CUP, ha)	610	81.15
SC - Milk	Milk, chocolate, fluid, commercial, lowfat	1	467 (1 c.)	610	76.56
SC - Milk	SC-Skim Milk, Unflavored	1	313 (1 c.)	610	51.31
SC - Salad	SC-Chef Salad	1	195 (2 c.)	610	31.97
SC - Salad	SC-Chef Salad	1	199 (3 c.)	610	32.62
SC - Salad	SC-Chicken Salad	1	502 (12 oz.)	610	82.30
Site Group: Elementary School; Meal Service: Lunch; Serving Date: 04/22/2013; Line: Regular					
SC - Fruit	Applesauce, mixed berry, 72/4 oz cup; as purchased	1	12 (4 oz.)	2	600.00
SC - Fruit	SC-Banana	1	12 (1 CN-CUP, ma)	2	600.00
SC - Milk	SC-Skim Milk, Unflavored	1	12 (1 c.)	2	600.00
SC - Salad	SC-Chef Salad	1	0 (3 c.)	2	0.00
SC - Salad	SC-Chef Salad	1	12 (2 c.)	2	600.00

Allergen Chart



Allergen Chart Page

The Allergen Chart report provides a list of all allergens found in the Menu Items for:

- All active Menu Items
- All Menu Items on Active Menus
- All Menu Items on Menus for a selected date range.

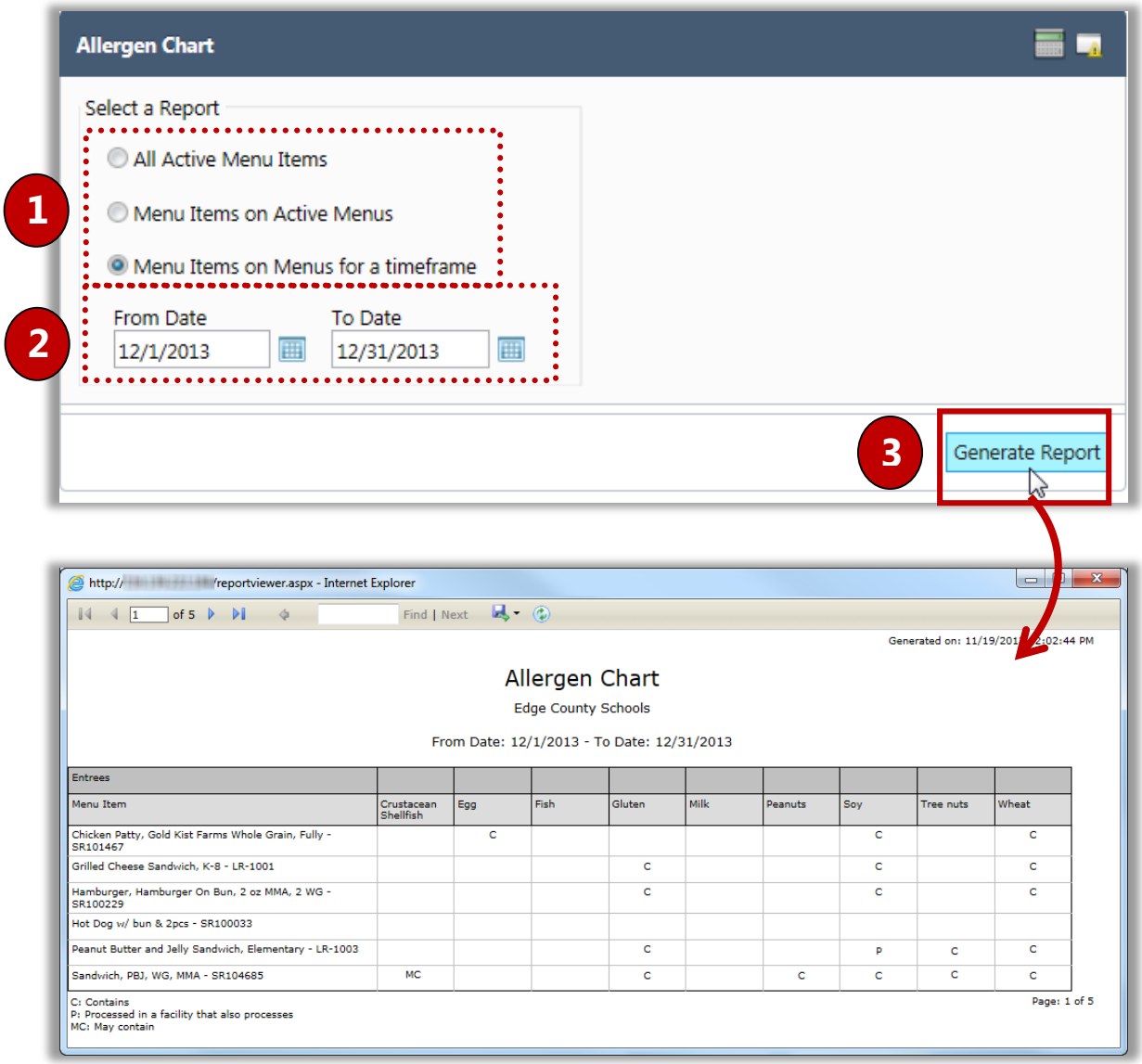
By default on the **Allergen Chart** page

- **All Active Menu Items** report option is selected.

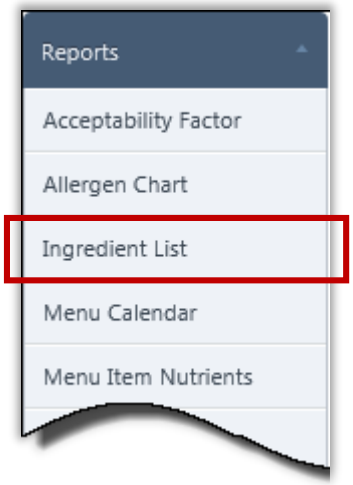
Generating an Allergen Chart

To generate an Allergen Chart

1. Select one report option.
2. If the **Menu Items on Menus for a timeframe** option is selected, enter or select a beginning and ending date.
3. Click Generate Report .



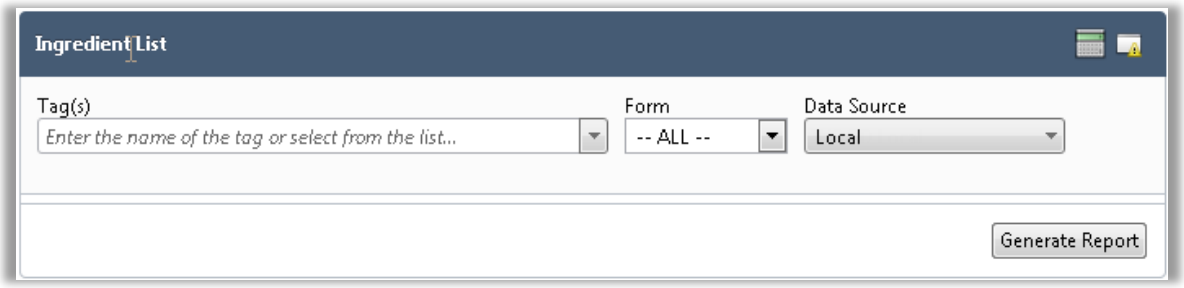
Ingredient List



Ingredient List generates a report of nutrients for a selected set of Ingredients. Ingredients are specified with a tag, data source, and form ("As Purchased", "As Served", or both).

One page is generated for each Ingredient. The report can be printed or exported to one of seven formats: XML, CVS, PDF, MHTL, TIFF, Excel or Word.

Ingredient List Page



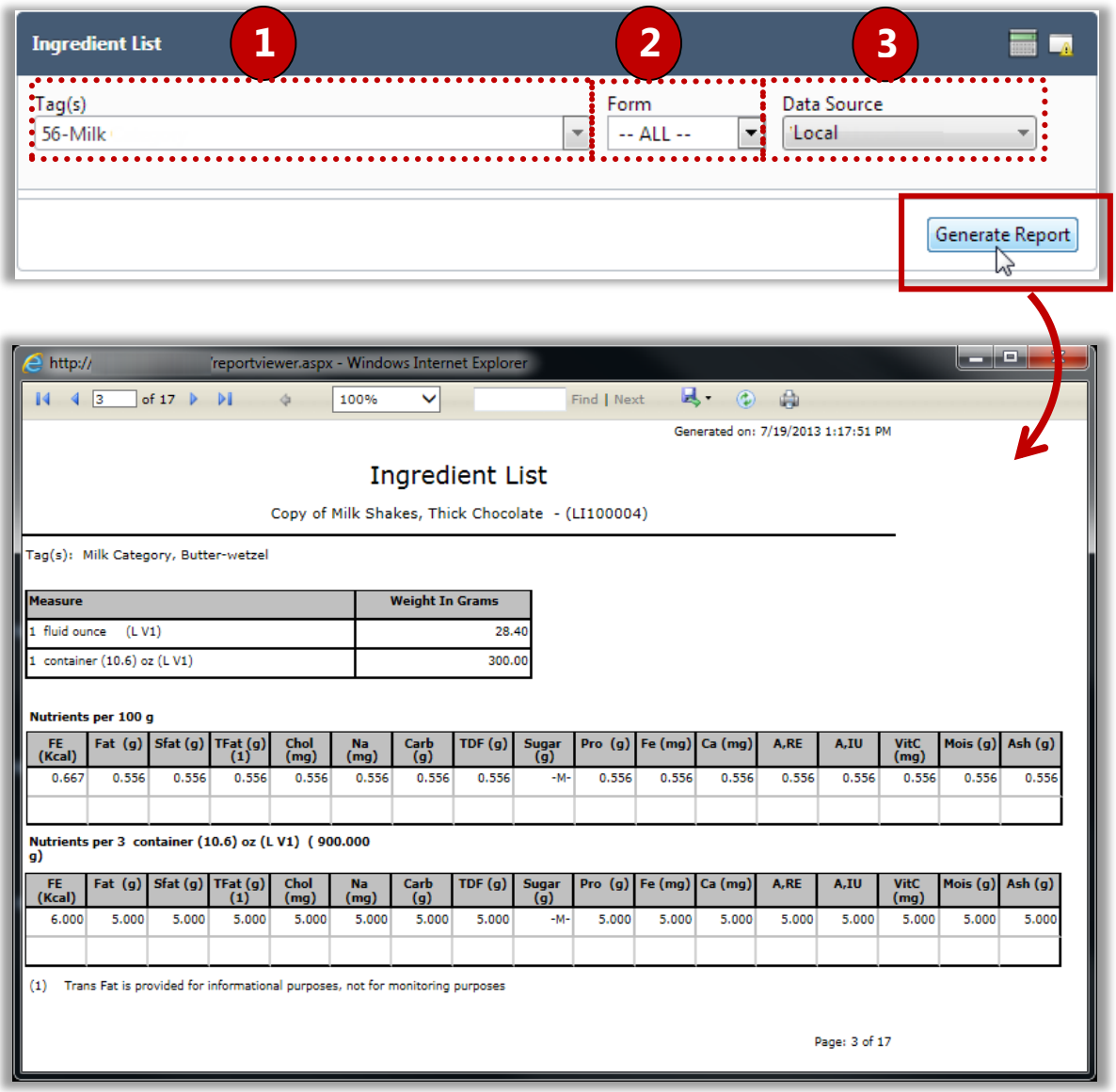
By default on the **Ingredient List** page

- **Tags** displays directions for selecting one tag to identify the group of recipes for which to print nutrition information; no tags are selected.
- **Form** is set to "ALL" which includes both "as Purchased" and "As Served" forms.
- **Data Source** is set to "Local".

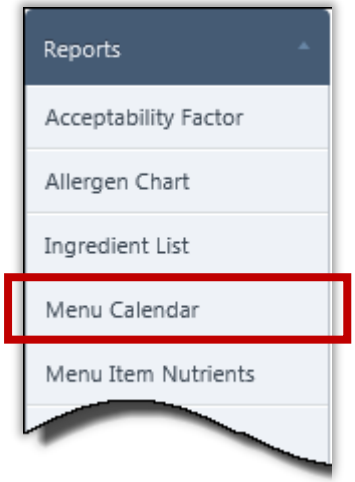
Generating an Ingredient List Report

To generate an Ingredient List report

1. Select one or more tags, separating multiple tags with semicolons.
2. Select a **Form**, if needed.
3. Select a **Data Source**, if needed.
4. Click Generate Report .



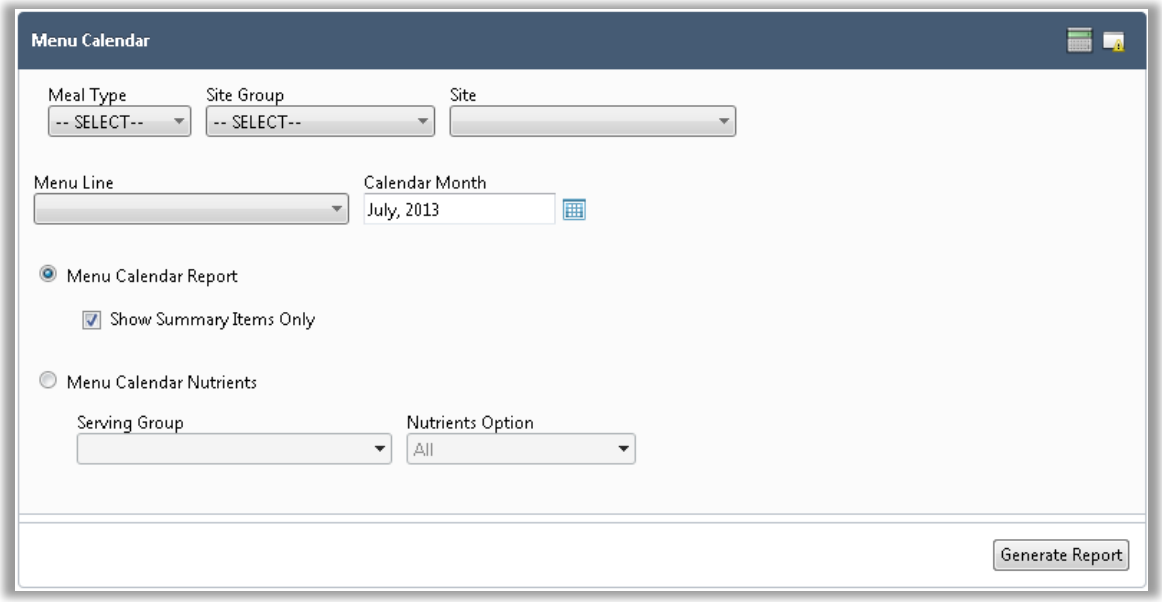
Menu Calendar



Menu Calendar displays either:

- Menu Calendar - report of Menu Items served on each date for a selected month, site, Site Group, Meal Type and Menu Line.
- Menu Calendar Nutrients – report of nutrients for each menu item served on each day for a selected month, site, Site Group, Meal Type and Menu Line.

Menu Calendar Page



By default, on the **Menu Calendar** page:

- **Meal Type** and **Site Group** are set to "SELECT".
- **Site** and **Menu Line** are blank [empty].
- **Calendar Month** is set to the current month and year.
- **Menu Calendar Report** option is selected**.**
- **Show Summary Item Only** option is selected (display only the name for menu items that have **Show in Summary** selected on the **Menu Item** tab on the **Recipe** page (see **Chapter 1: Ingredients > Creating a Menu Item on page 40**).

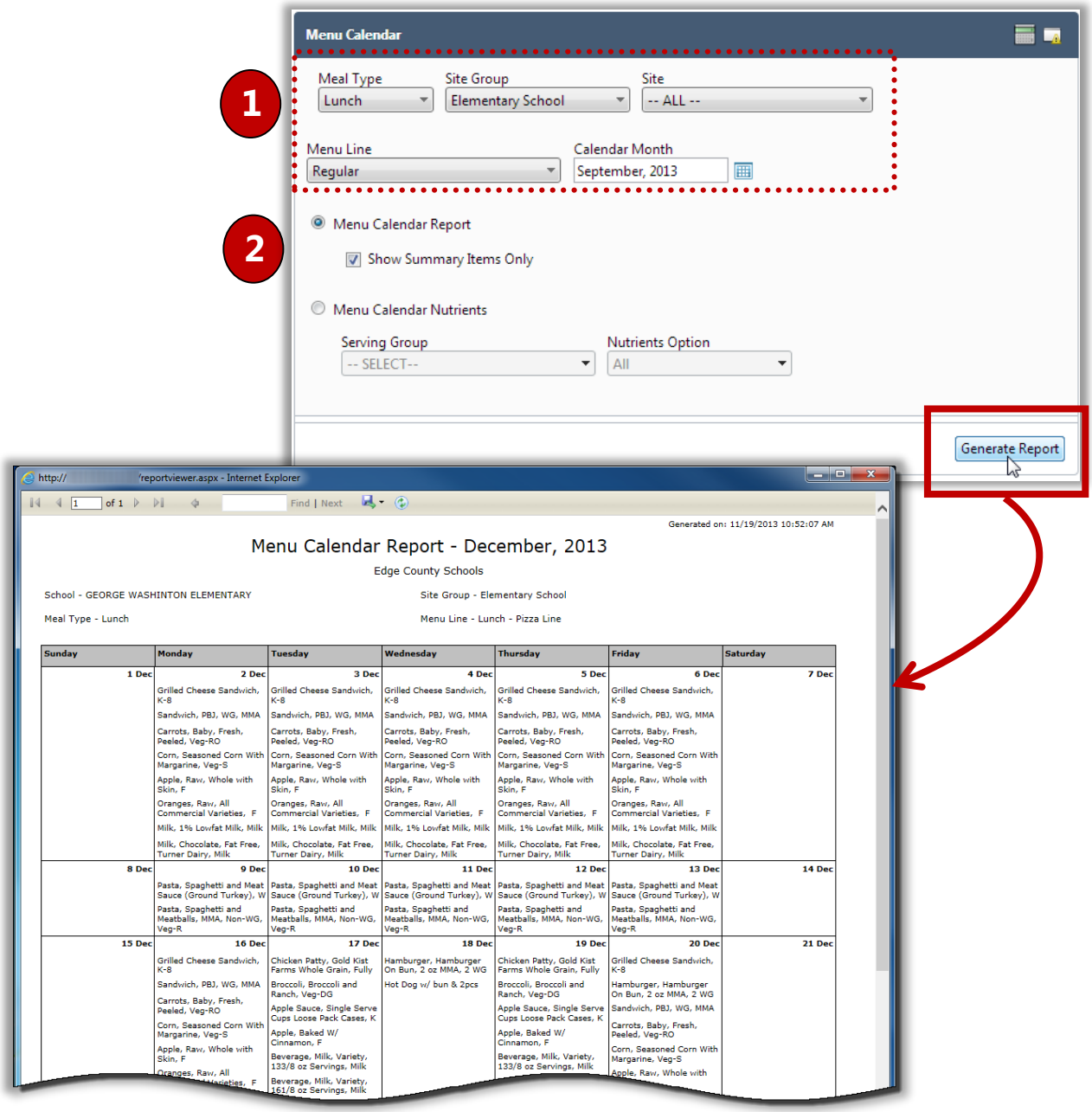
Generating a Menu Calendar Report

To generate a Menu Calendar report

1. Select **Meal Type**, **Site Group**, and **Menu Line**; select **Site** and **Calendar Month**, if needed.

2. Clear **Show Summary Items Only** to include detailed Menu Item descriptions.

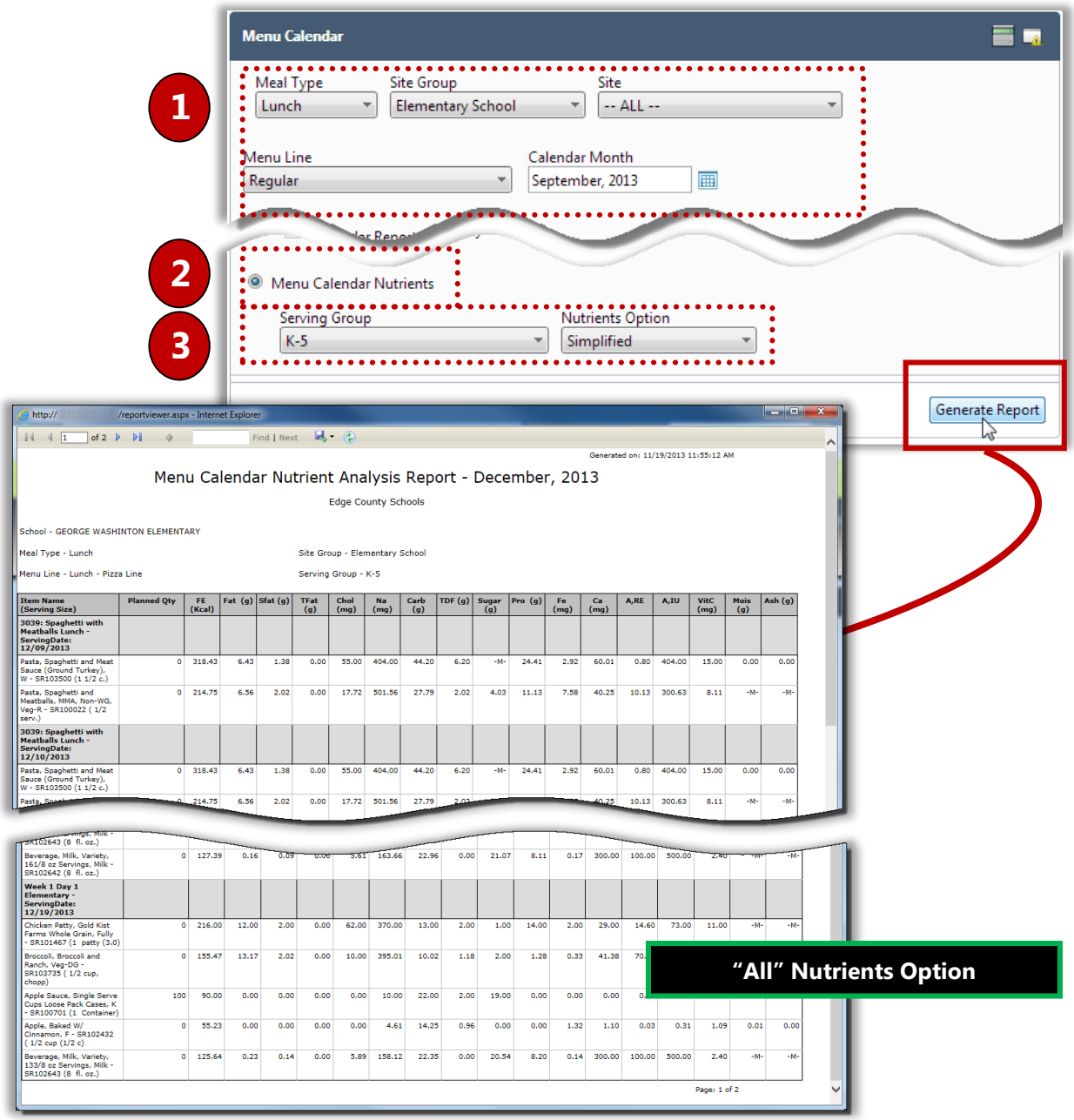
3. Click Generate Report .



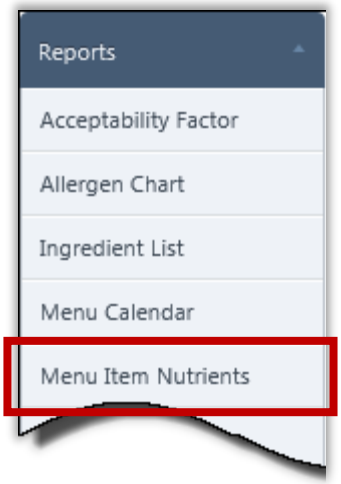
Generating a Menu Calendar Nutrients Report

To generate a Menu Calendar Nutrient report

1. Select **Meal Type**, **Site Group**, and **Menu Line**; select **Site** and **Calendar Month**, if needed.
2. Select **Menu Calendar Nutrients**.
3. Select a **Serving Group** and change the **Nutrient Option**, if needed.
4. Click Generate Report .



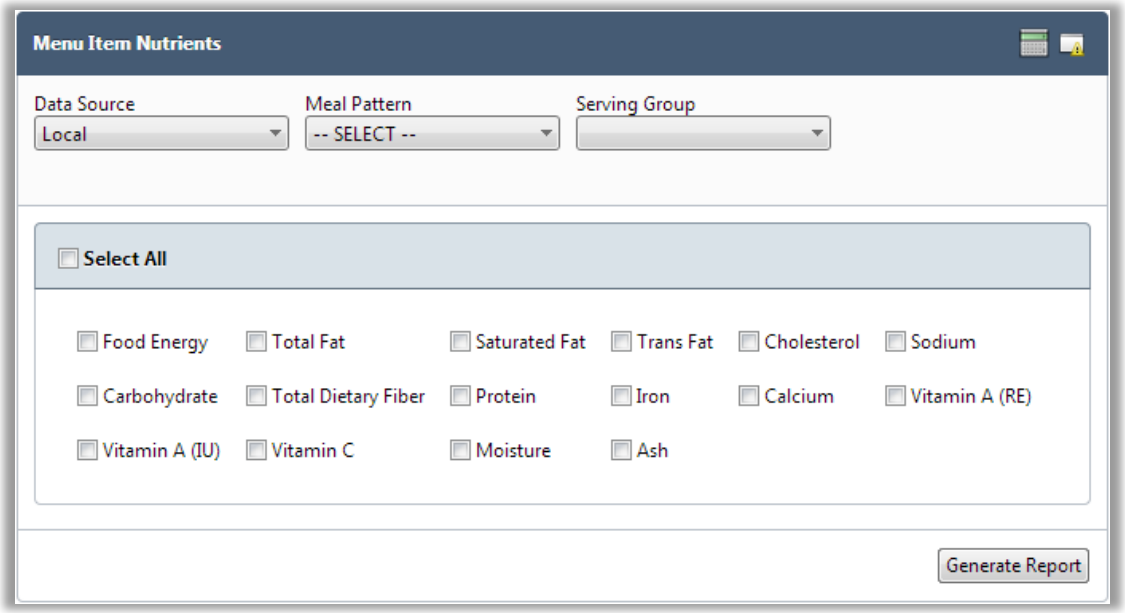
Menu Item Nutrients



Menu Item Nutrients generates a report of nutrient information for all menu items for a selected data source, Meal Pattern and Serving Group. Allergen information is included with each Menu Item name, when available.

The report can be printed or exported to one of seven formats: XML, CVS, PDF, MHTL, TIFF, Excel or Word.

Menu Item Nutrients Page



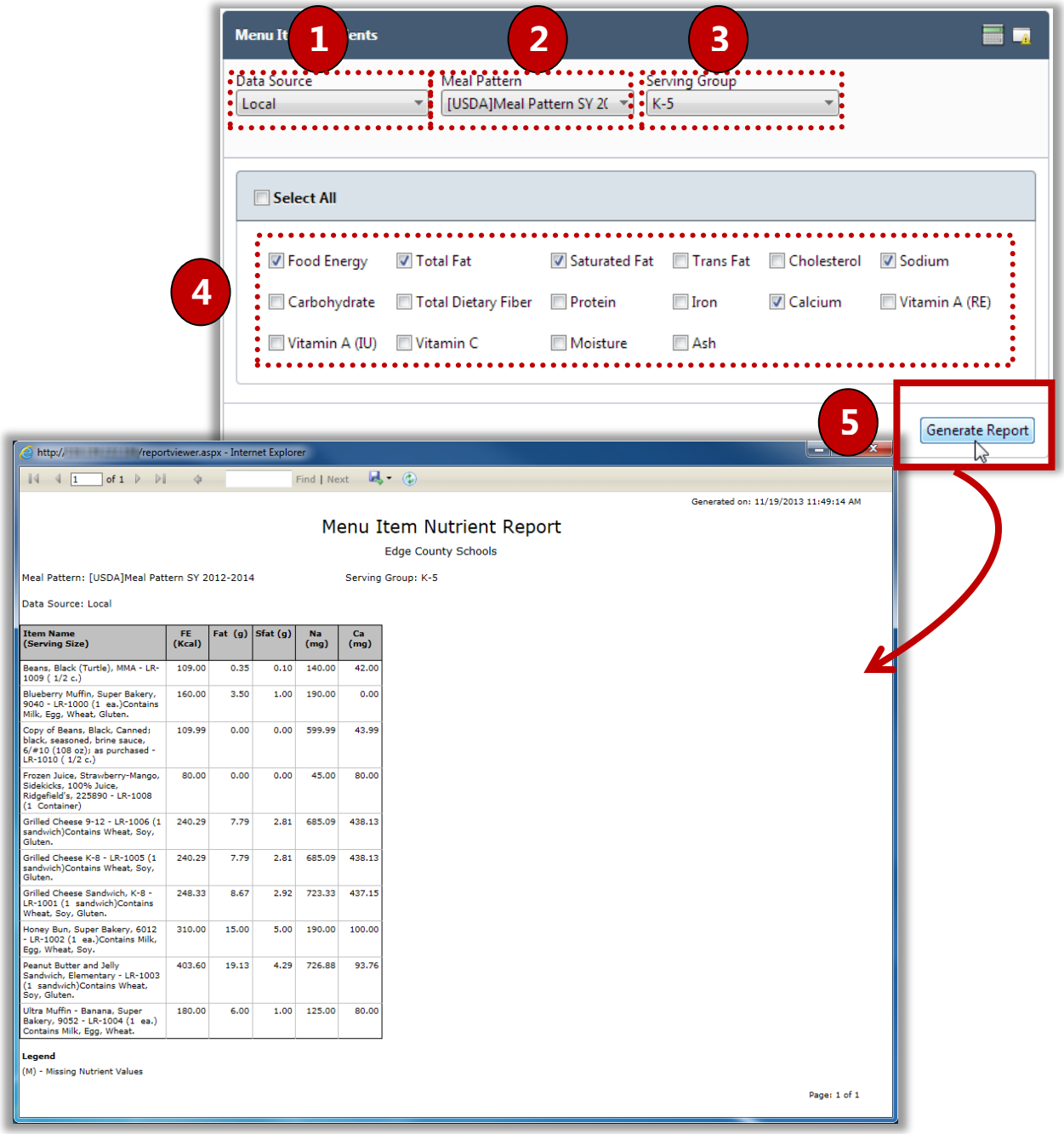
By default, on the **Menu Item Nutrients** page:

- **Data Source** is set to “Local”.
- **Meal Pattern** is set to “SELECT“.
- **Serving Group** is blank [empty].
- No nutrients are selected.

Generating a Menu Item Nutrients Report

To generate a Menu Item Nutrients report

1. Select a **Data Source**, if needed.
2. Select a **Meal Pattern** (required).
3. Select a **Serving Group** (required).
4. Select **Select All** or one or more nutrients.
5. Click Generate .

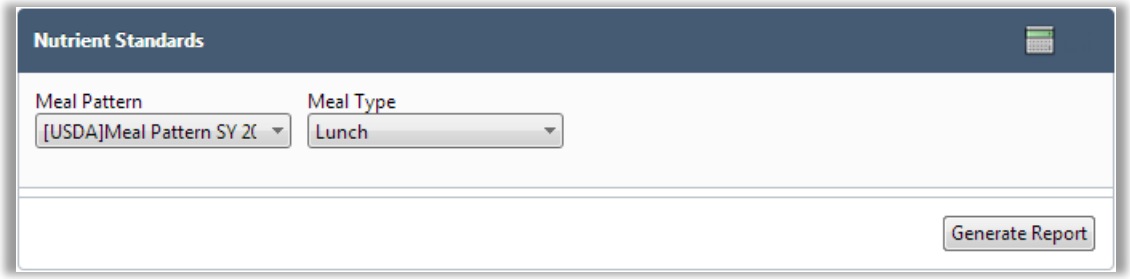


Nutrient Standards

Nutrient Standards lists all current nutrient standards (requirements) for each serving group in a selected Meal Pattern as specified by the USDA.

The report can be printed or exported to one of seven formats: XML, CVS, PDF, MHTL, TIFF, Excel or Word.

Nutrient Standards Page



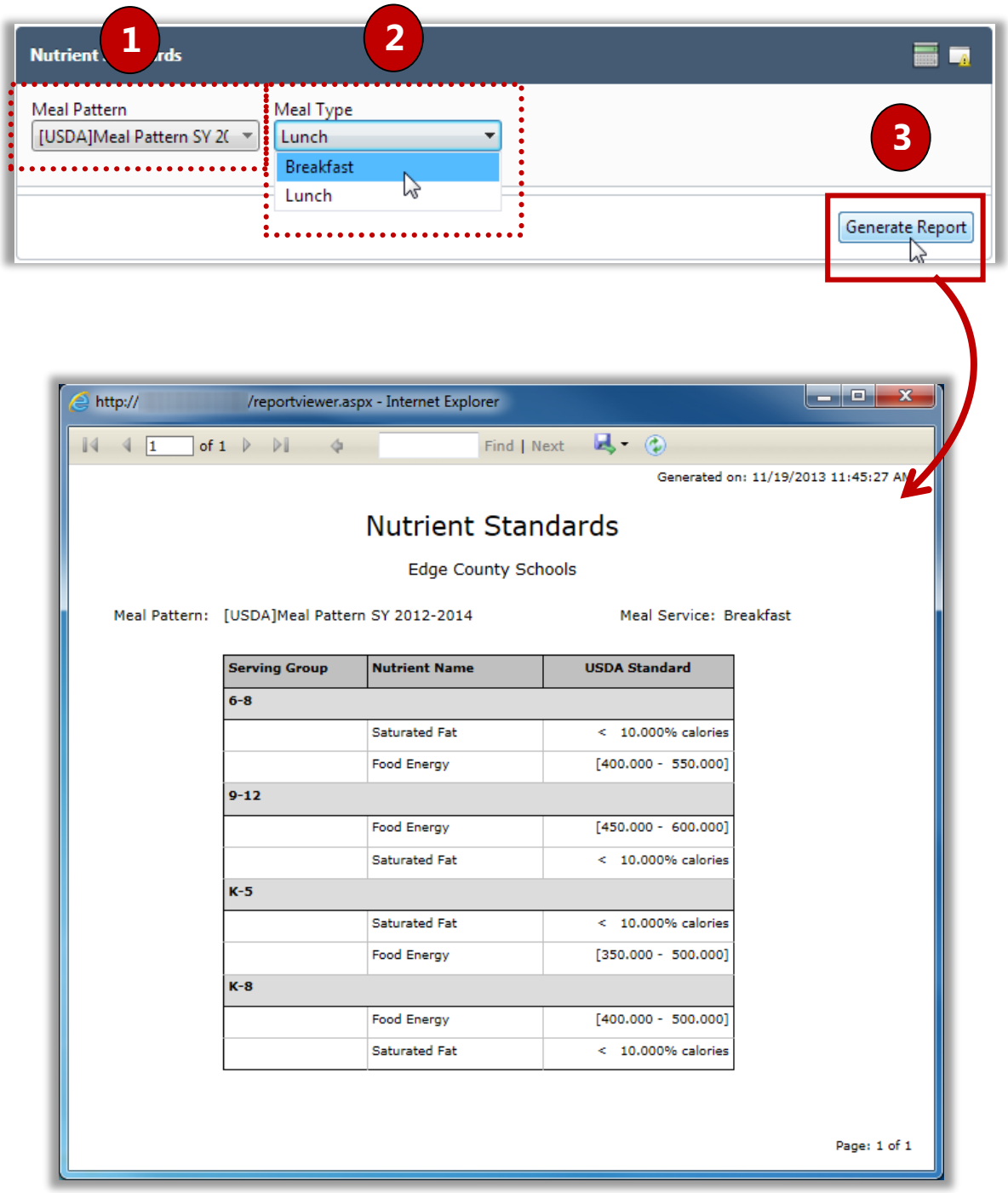
By default on the **Nutrient Standards** page:

- **Meal Pattern** is set to "**[USDA] Meal Pattern SY 2012-2014**".
- **Meal Type** is set to "**Lunch**".

Generating a Nutrient Standards Report

To generate a Nutrient Standards report

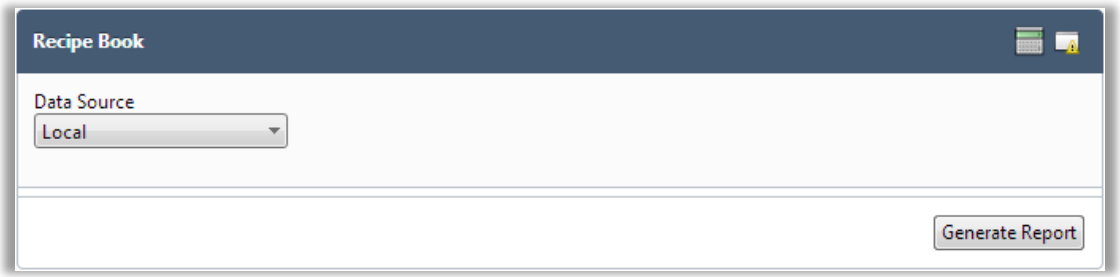
1. Select a **Meal Pattern**.
2. Select a **Meal Type**.
3. Click Generate Report .



Recipe Book

Recipe Book prints each recipe included in a selected Data Source on individual pages to allow compilation into a printed book. Detailed nutrition information for all recipe ingredients is provided.

Recipe Book Page



By default on the **Recipe Book** page:

- **Data Source** is set to "**Local**".

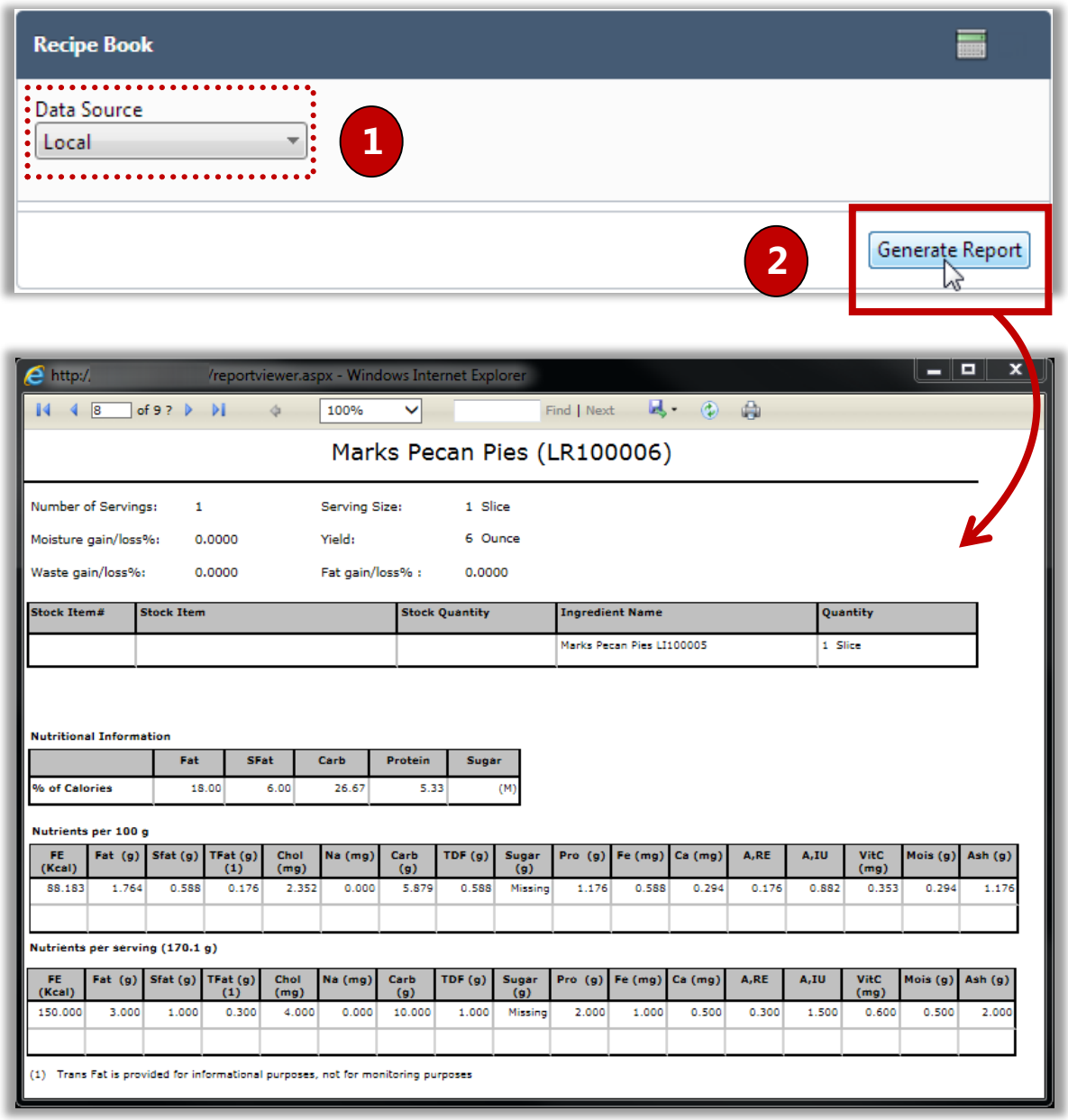
Generating a Recipe Book

Generating a recipe book includes all recipes in the selected database, and therefore can require a lengthy time to generate the report, to print the report, as well require a large volume of paper for printout. Use your resources carefully!

After generation, book can be printed or saved to a file, such as a PDF or MS Word document.

To generate a Recipe book

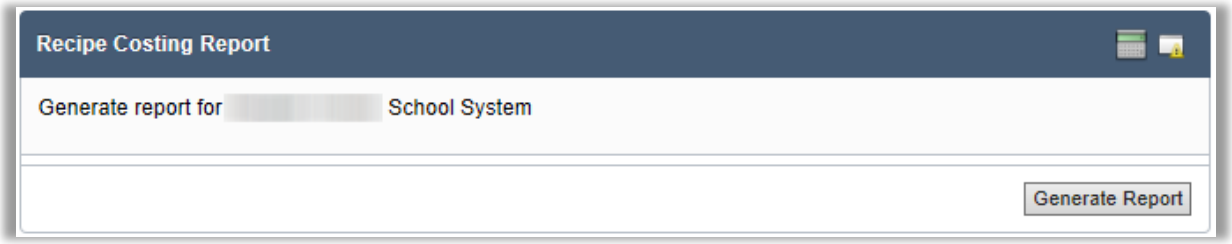
1. Select a **Data Source**, if needed.
2. Click Generate Report .



Recipe Costing Report

Recipe Costing provides the cost to produce each recipe for the district. Recipe Material cost and Cost per Serving is listed for each recipe.

Recipe Costing Report Page



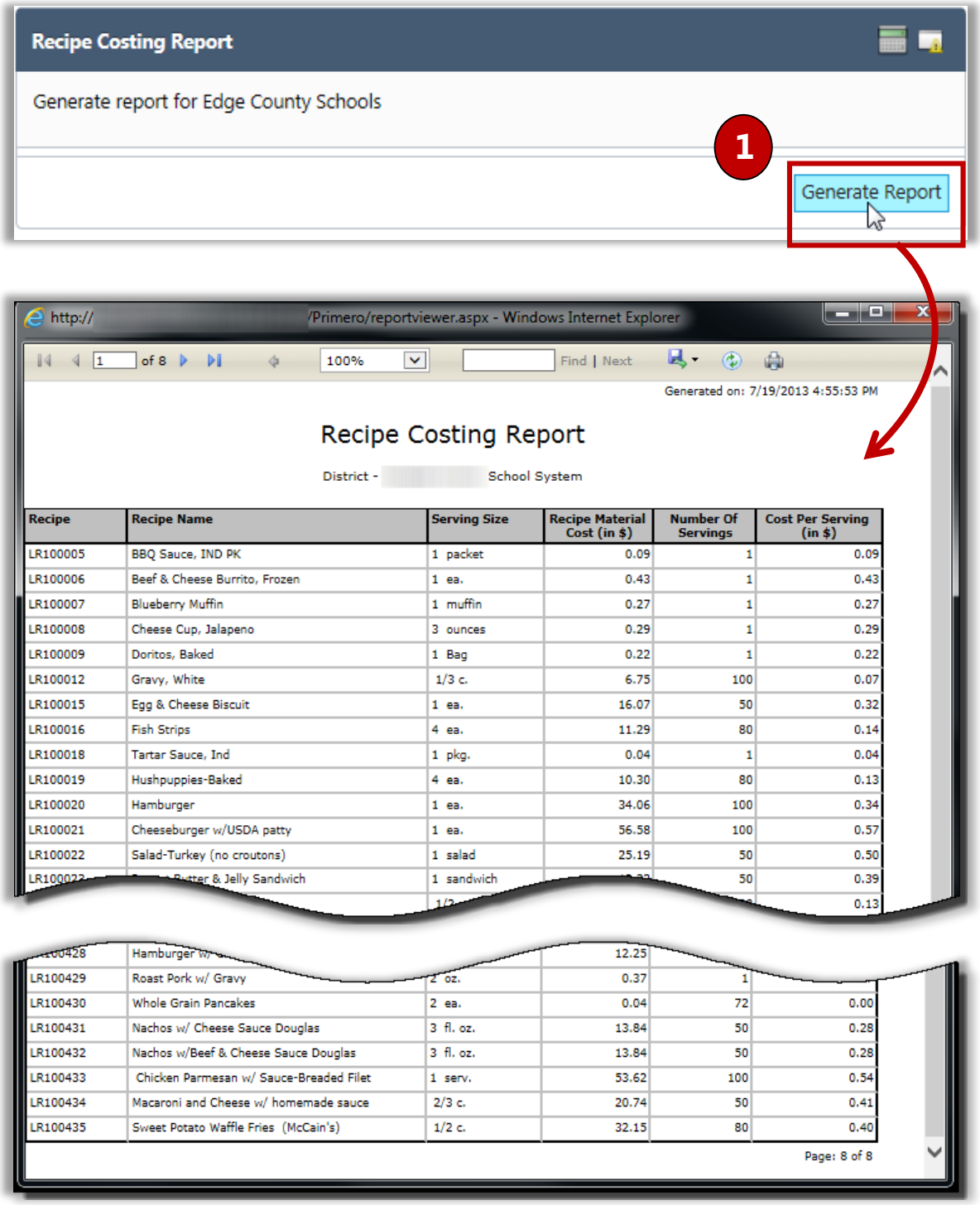
By default on the **Recipe Costing Report** page:

- No options or entries are available or required.

Generating a Recipe Costing Report

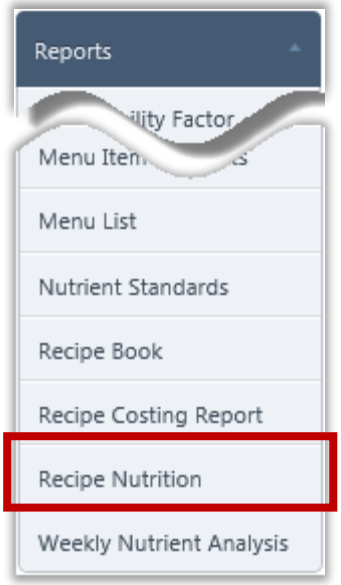
To generate a Recipe Costing Report

1. Click Generate Report .



Recipe	Recipe Name	Serving Size	Recipe Material Cost (in $)	Number Of Servings	Cost Per Serving (in $)
LR100005	BBQ Sauce, IND PK	1 packet	0.09	1	0.09
LR100006	Beef & Cheese Burrito, Frozen	1 ea.	0.43	1	0.43
LR100007	Blueberry Muffin	1 muffin	0.27	1	0.27
LR100008	Cheese Cup, Jalapeno	3 ounces	0.29	1	0.29
LR100009	Doritos, Baked	1 Bag	0.22	1	0.22
LR100012	Gravy, White	1/3 c.	6.75	100	0.07
LR100015	Egg & Cheese Biscuit	1 ea.	16.07	50	0.32
LR100016	Fish Strips	4 ea.	11.29	80	0.14
LR100018	Tartar Sauce, Ind	1 pkg.	0.04	1	0.04
LR100019	Hushpuppies-Baked	4 ea.	10.30	80	0.13
LR100020	Hamburger	1 ea.	34.06	100	0.34
LR100021	Cheeseburger w/USDA patty	1 ea.	56.58	100	0.57
LR100022	Salad-Turkey (no croutons)	1 salad	25.19	50	0.50
LR100023	[illegible] Butter & Jelly Sandwich	1 sandwich	[illegible]	50	0.39
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	0.13
[illegible]	Hamburger w/ [illegible]	[illegible]	12.25	[illegible]	[illegible]
LR100429	Roast Pork w/ Gravy	2 oz.	0.37	1	[illegible]
LR100430	Whole Grain Pancakes	2 ea.	0.04	72	0.00
LR100431	Nachos w/ Cheese Sauce Douglas	3 fl. oz.	13.84	50	0.28
LR100432	Nachos w/Beef & Cheese Sauce Douglas	3 fl. oz.	13.84	50	0.28
LR100433	Chicken Parmesan w/ Sauce-Breaded Filet	1 serv.	53.62	100	0.54
LR100434	Macaroni and Cheese w/ homemade sauce	2/3 c.	20.74	50	0.41
LR100435	Sweet Potato Waffle Fries (McCain's)	1/2 c.	32.15	80	0.40

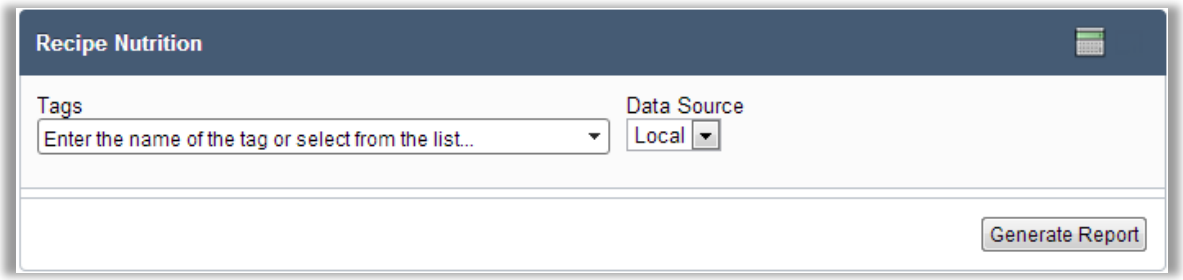
Recipe Nutrition



Recipe Nutrition produces a report that lists all nutrient information per serving and per 100 gms for all recipes that share a selected tag.

The report can be printed or exported to one of seven formats: XML, CVS, PDF, MHTL, TIFF, Excel or Word.

Recipe Nutrition Page



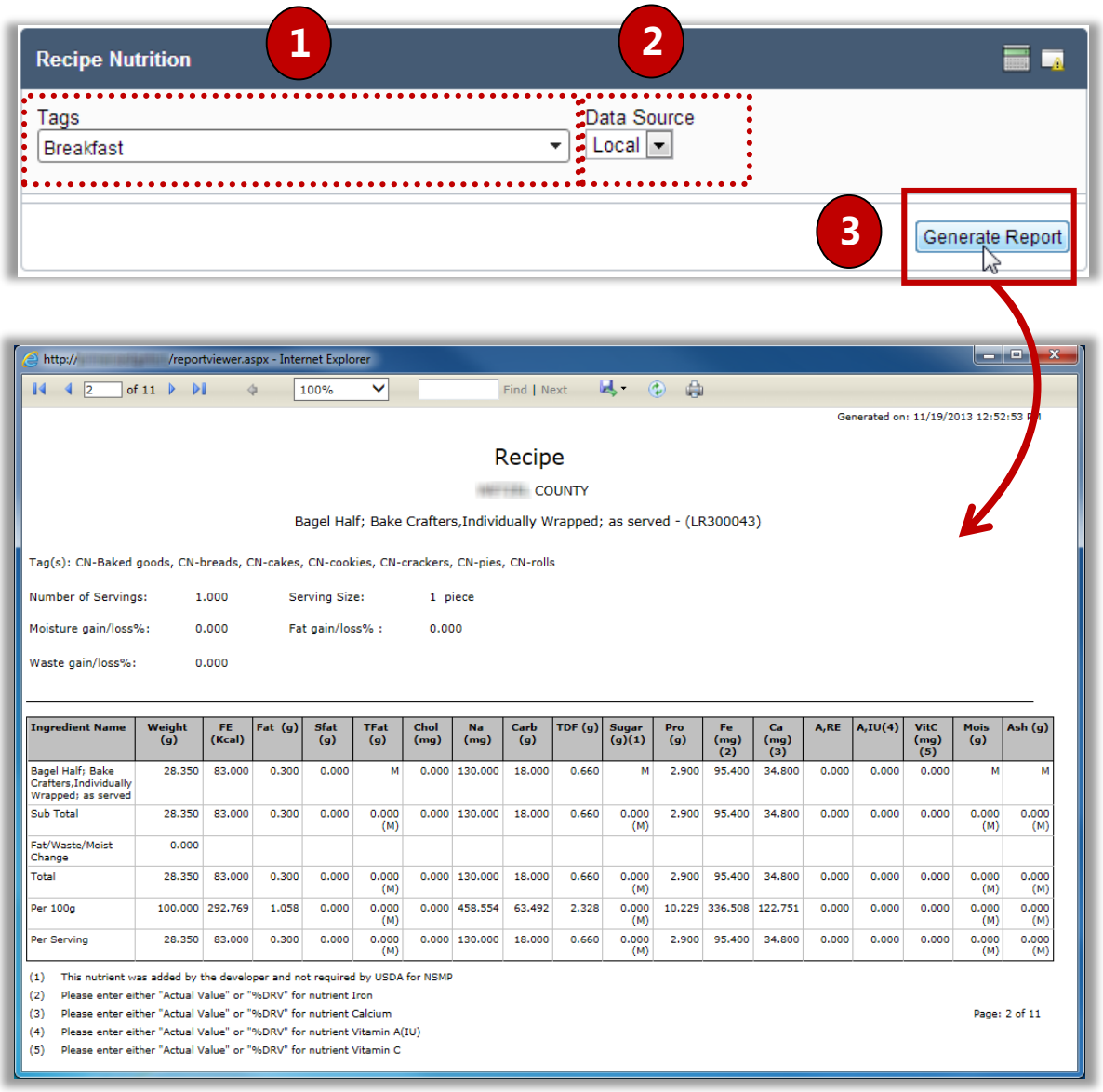
By default on the **Recipe Nutrition** page:

- **Tags** displays directions for entering or selecting the tag to identify the group of recipes for which to print nutrition information.
- **Data Source** is set to "**Local**".

Generating a Recipe Nutrition Report

To generate a Recipe Nutrition Report

1. Select ***one*** recipe tag (multiple tags cannot be selected).
2. Select a **Data Source**, if needed.
3. Click Generate Report .



Ingredient Name	Weight (g)	FE (Kcal)	Fat (g)	Sfat (g)	TFat (g)	Chol (mg)	Na (mg)	Carb (g)	TDF (g)	Sugar (g)(1)	Pro (g)	Fe (mg) (2)	Ca (mg) (3)	A,RE	A,IU(4)	VitC (mg) (5)	Mois (g)	Ash (g)
Bagel Half; Bake Crafters,Individually Wrapped; as served	28.350	83.000	0.300	0.000	M	0.000	130.000	18.000	0.660	M	2.900	95.400	34.800	0.000	0.000	0.000	M	M
Sub Total	28.350	83.000	0.300	0.000	0.000 (M)	0.000	130.000	18.000	0.660	0.000 (M)	2.900	95.400	34.800	0.000	0.000	0.000	0.000 (M)	0.000 (M)
Fat/Waste/Moist Change	0.000																	
Total	28.350	83.000	0.300	0.000	0.000 (M)	0.000	130.000	18.000	0.660	0.000 (M)	2.900	95.400	34.800	0.000	0.000	0.000	0.000 (M)	0.000 (M)
Per 100g	100.000	292.769	1.058	0.000	0.000 (M)	0.000	458.554	63.492	2.328	0.000 (M)	10.229	336.508	122.751	0.000	0.000	0.000	0.000 (M)	0.000 (M)
Per Serving	28.350	83.000	0.300	0.000	0.000 (M)	0.000	130.000	18.000	0.660	0.000 (M)	2.900	95.400	34.800	0.000	0.000	0.000	0.000 (M)	0.000 (M)

Weekly Nutrient Analysis

The Weekly Nutrient Analysis report provides:

- Nutrition Report
- Nutrition Summary Report
- Food Component Report

The reports are generated from the Standard Nutrients footer for a selected week. The week must include a minimum of 3 menus.

After clicking Analysis Report the Standard Nutrients footer appears.

Weekly Nutrient Analysis Page

By default on the **Weekly Nutrient Analysis** page:

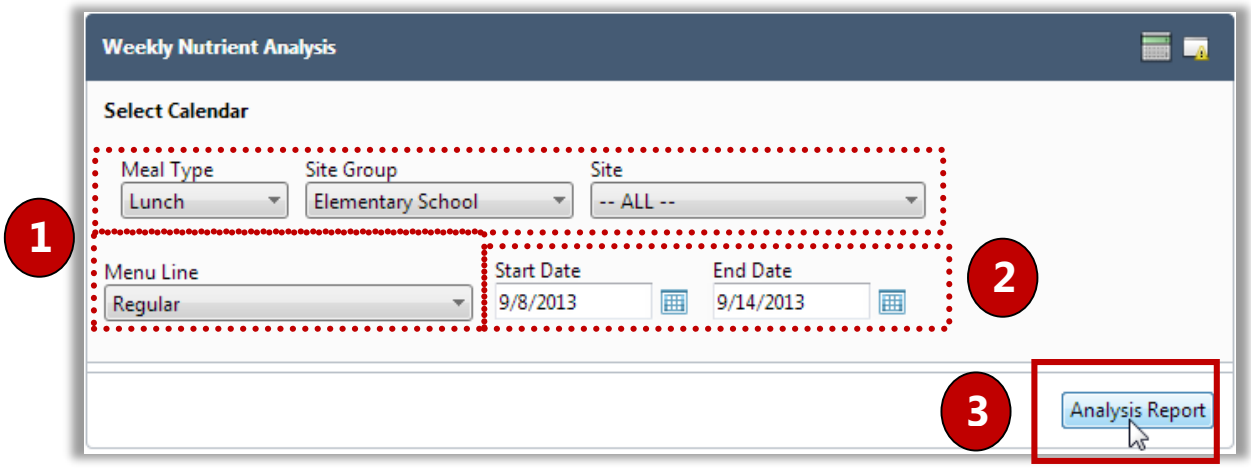
- **Meal Type** and **Site Group** are set to "SELECT".
- **Site** and **Menu Line** are blank.
- **Start Date** and **End Date** are blank.

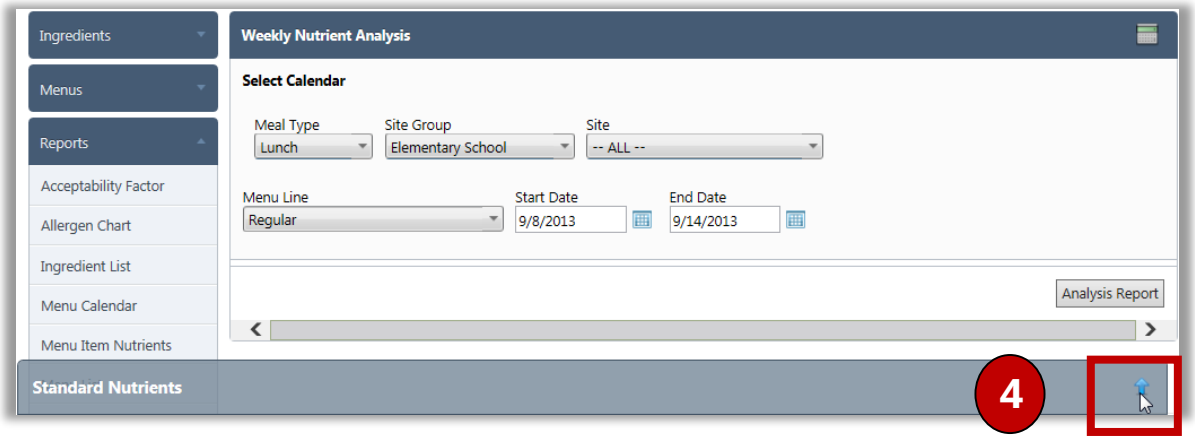
Generating a Weekly Nutrient Analysis Report

You only need to select a **Start Date** or **End Date**—the other date is automatically calculated for you (seven days after or before the selected date, respectively).

To generate the Standard Nutrient footer for a selected Menu Line and week

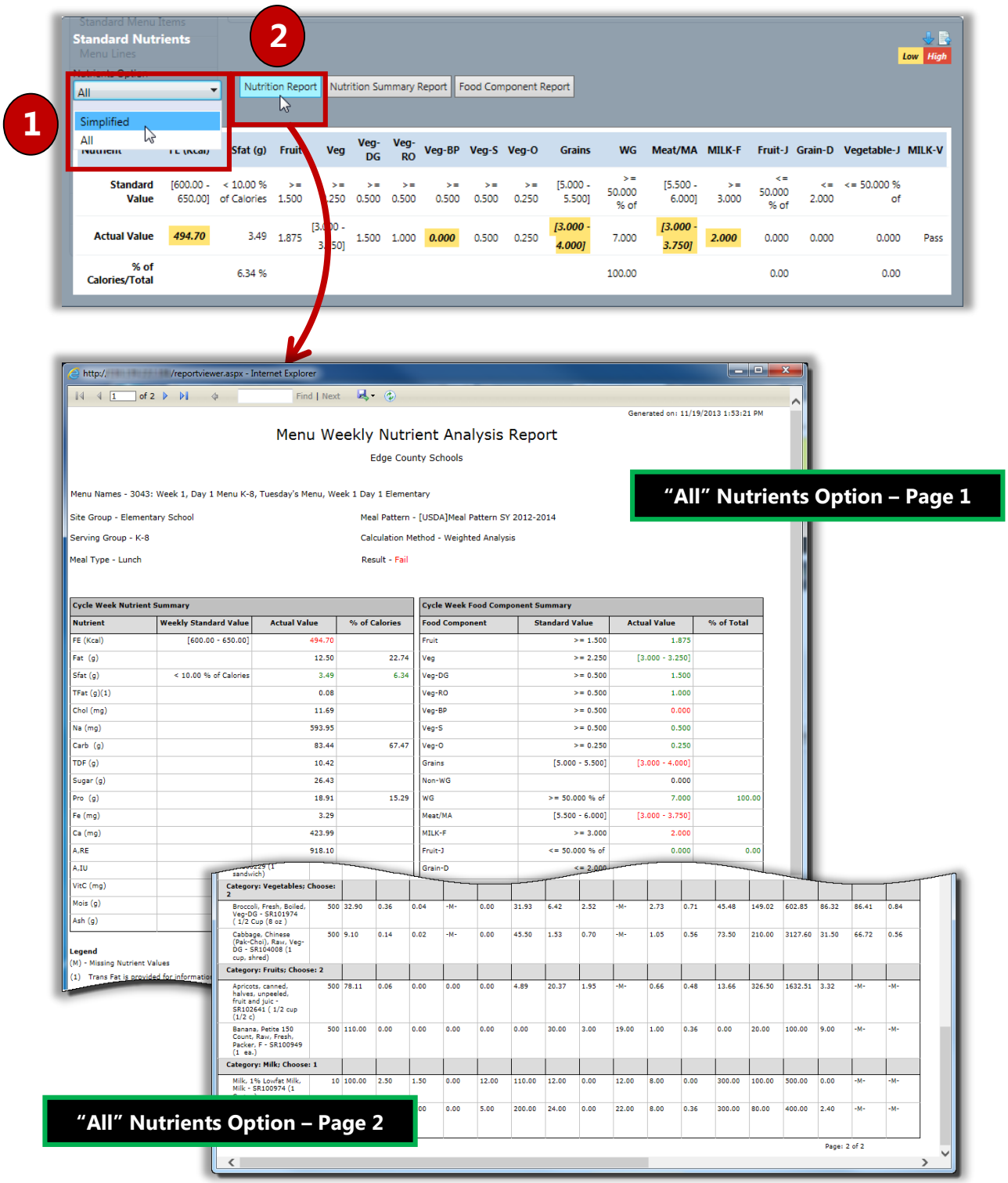
1. Select a **Meal Type**, **Site Group**, and **Menu Line,** and **Site**, if needed.
2. Enter or select a **Start Date** and/or **End Date**.
3. Click Analysis Report .
4. Expand the Standard Nutrients footer.
5. Select a **Nutrient Option**, if needed.
6. Click Nutrition Report .





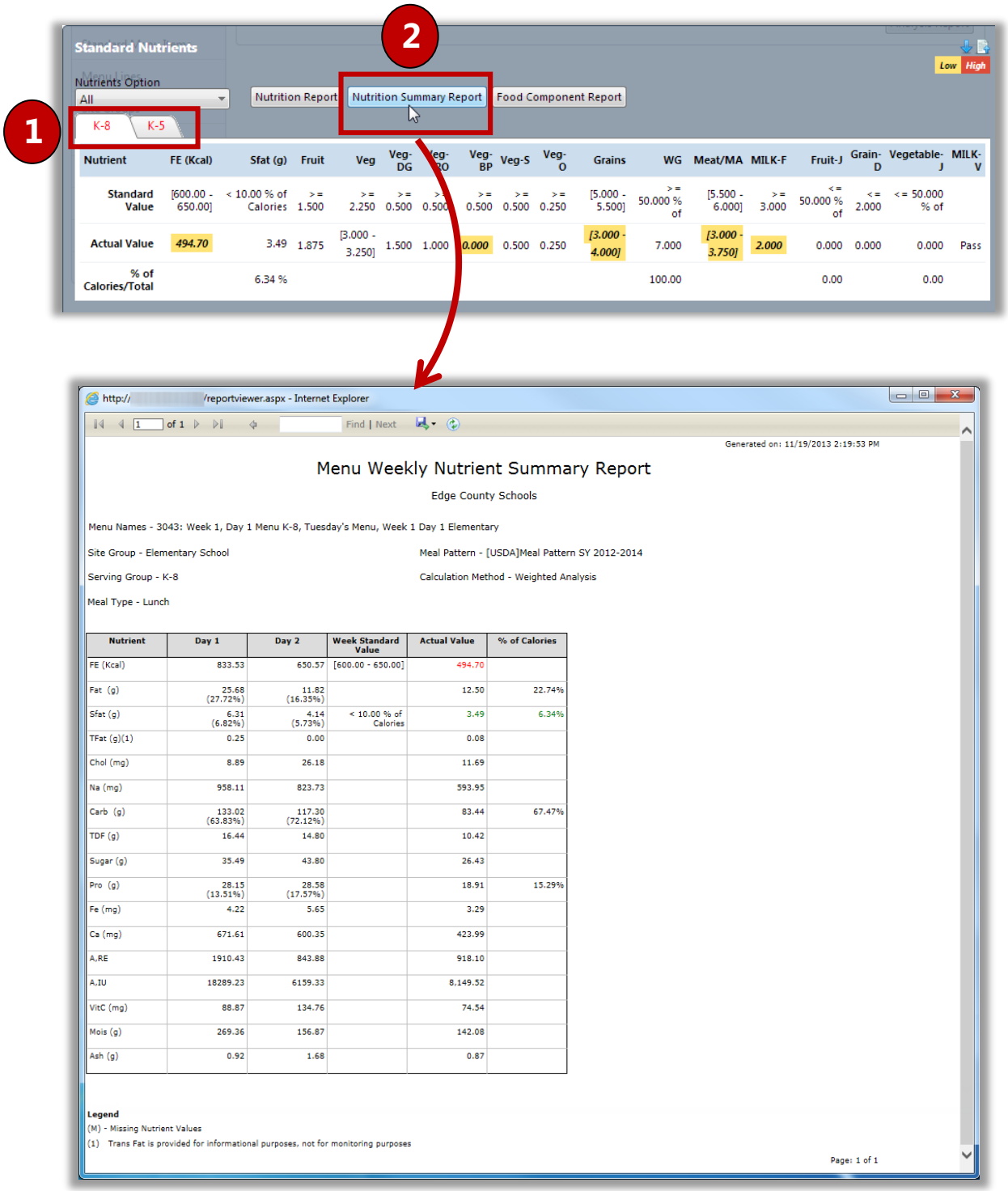
To generate a Nutrition Report from the Standard Nutrients footer

1. Select a Nutrients Option and a serving group, if needed.
2. Click Nutrition Report .



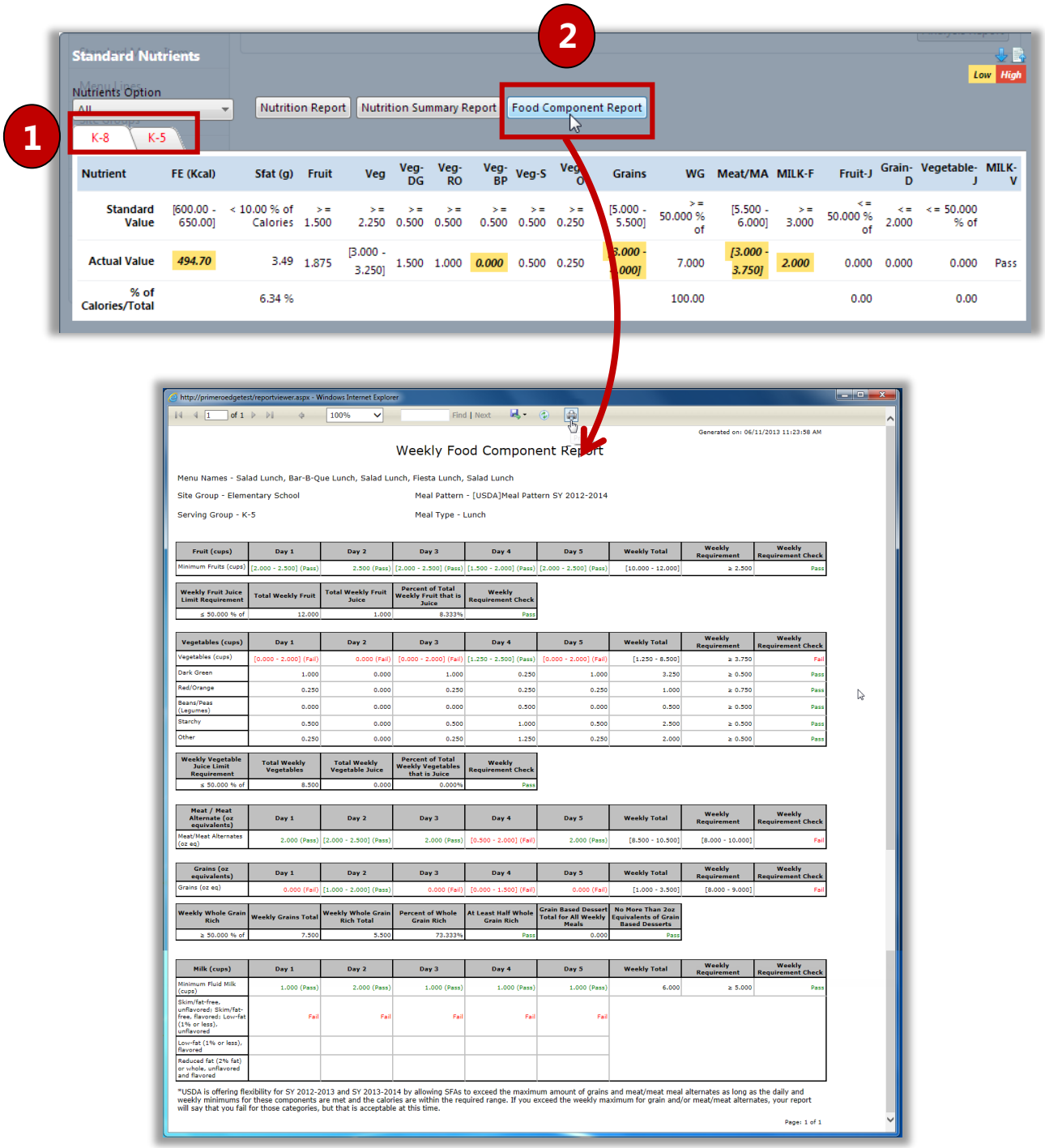
To generate a Nutrition Summary Report from the Standard Nutrients footer

1. Select a serving group, if needed.
2. Click Nutrition Summary Report .



To generate a Food Component report from the Standard Nutrients footer

1. Select a serving group, if needed.
2. Click **Food Component Report** .



End of Section

5 Configuration

In this chapter you will learn how to:

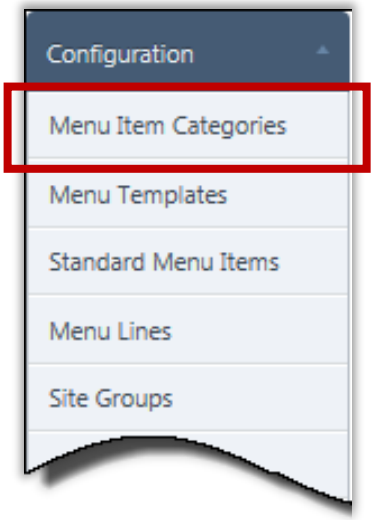
- ✓ Create and manage categories of Menu Items.
- ✓ Create and manage templates for Menus.
- ✓ Add and remove items on the Standard Menu Item list.
- ✓ Create and manage Menu Lines for a meal service.
- ✓ Add, change and remove Site groups.
- ✓ Configure Meal Service types, Menu Lines, and effective Meal Service start dates for a Site.
- ✓ Create and change Hazard Analysis Critical Control Points and processes used in recipe production.
- ✓ Set up holidays or special occasion days on a calendar used as a template for Menu Calendars.
- ✓ Create, display and manage Meal Patterns.
- ✓ Add a new data source and update version data.

Configuration at a Glance

Menu Function	Description
Menu Item Categories	Create and update categories for Menu Items.
Menu Templates	Create and manage templates for Menus.
Standard Menu Items	Create and remove menu items from the Standard Menu Item list – items that are frequently included on Menus.
Menu Lines	Create and update Menu Lines for each Meal Service.
Site Groups	Create and maintain groups of Sites which are used when creating Menus and Menu Cycles, and assigning Menus.
Site Configuration	Specify the Meal Service(s) and the Menu Item Categories included for each Meal Service for a Site.
HACCP Configuration	Create Hazard Analysis processes and Critical Control Points used in recipe production.
Holiday Schedule	Set up calendar days as holidays or other special occasion days.
Meal Pattern	Display standard Meal Pattern details, and create and manage local Meal Patterns, Serving Groups and Meal Service nutrients.
Data Sources & Versions	Add a local data source and update data source version data.

Note
Menus and functions to which you have access are those appropriate for your role with PrimeroEdge. When you access the **Configuration** menu, you may see a subset of the functions listed above.

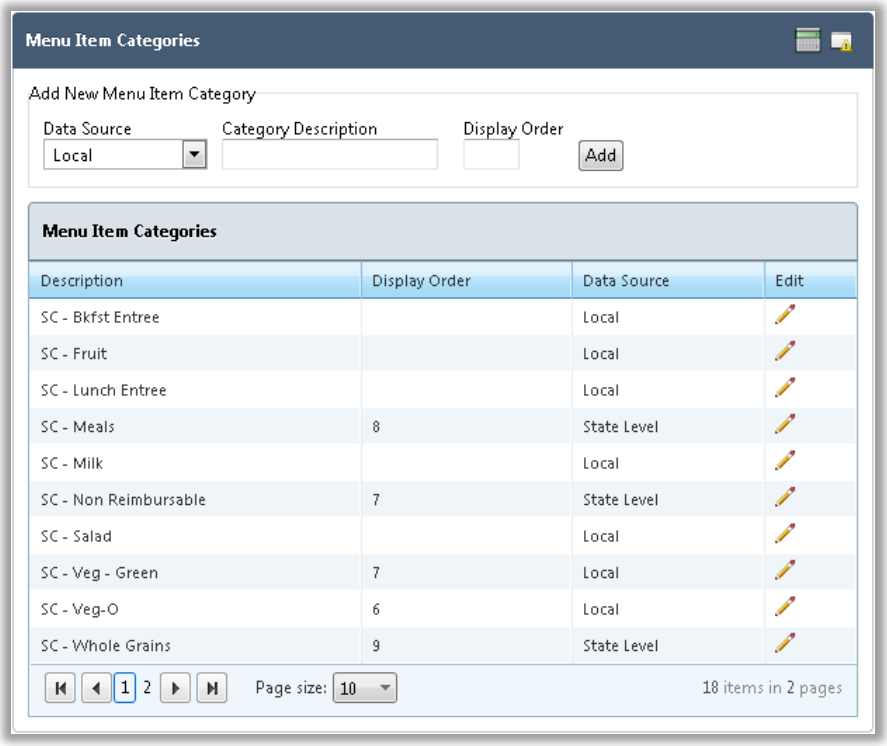
Menu Item Categories



Menu Item Categories adds new categories to organize Menu Items, and manages category descriptions. Grouping Menu Items makes it easier and faster to find an item when searching, such as when adding a Menu Item to a Menu or when reviewing Menu Items when assigning a Menu or building a Menu.

Menu Item display order in drop-down lists in the **[Production]** module are also managed through this function.

Menu Item Categories Page



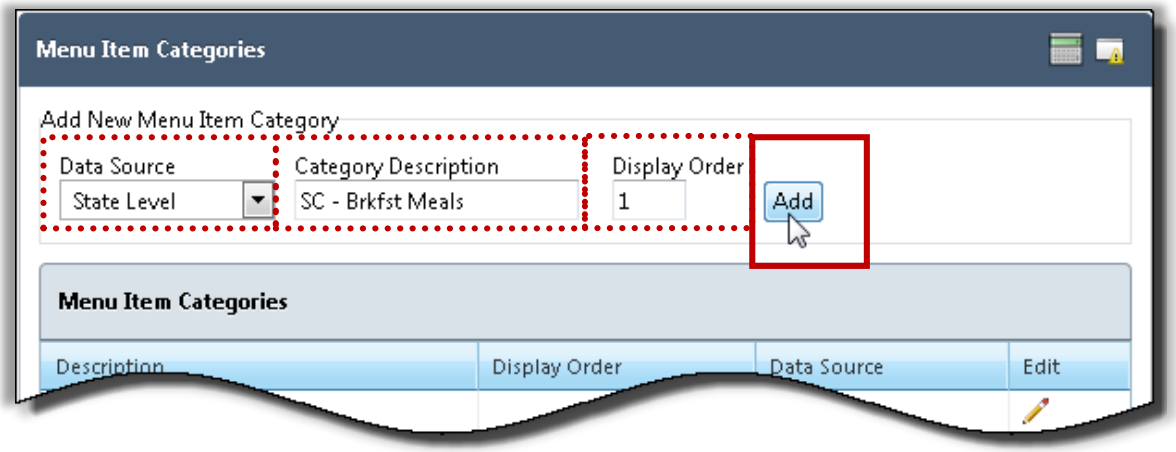
By default on the **Menu Items Categories** page:

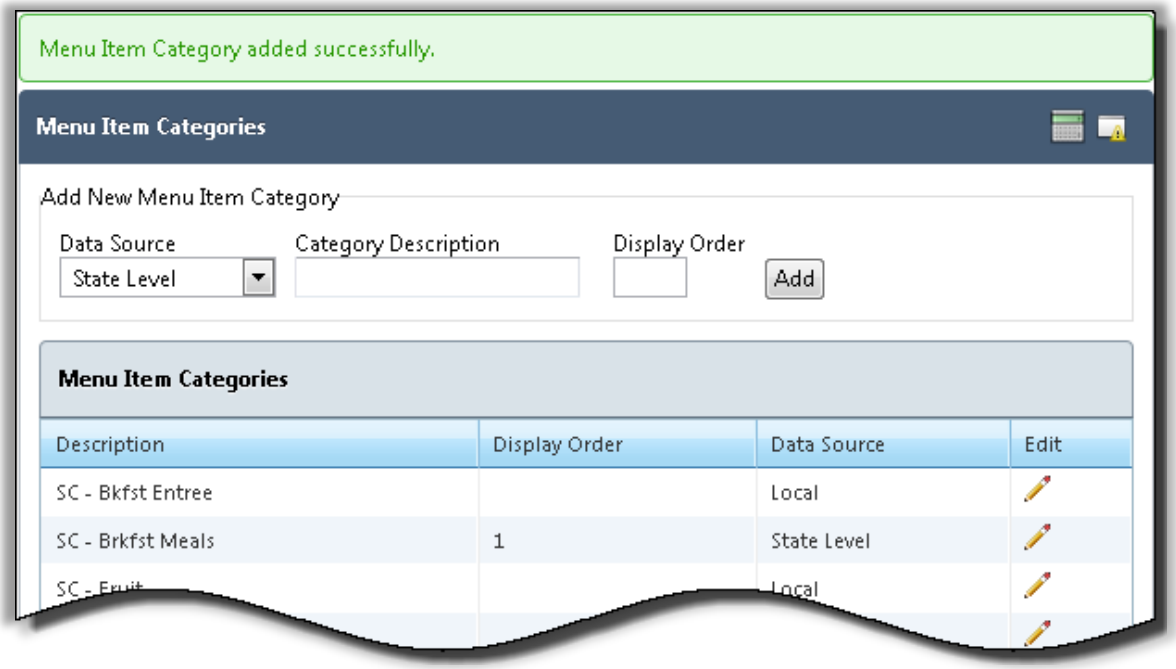
- **Data Source** is set to "Local".
- **Category Description** and **Display Order** are blank (empty).
- All existing menu item categories are shown in the **Menu Item Categories** list.

Adding a Menu Item Category

To add a new Menu Item category

1. Select a **Data Source**, if needed.
2. Enter a brief name or description for the new category in **Category Description.**
3. Enter a number in **Display Order** to represent the placement of the new category in drop-down lists on various **[Production]** module pages.
4. Click Add .

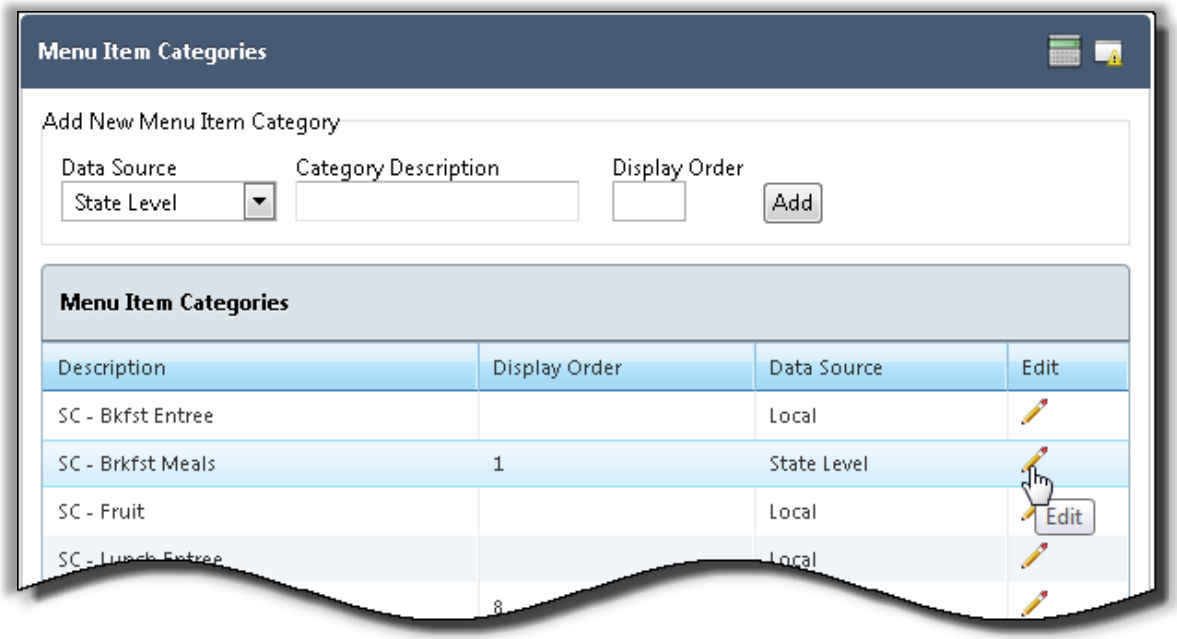


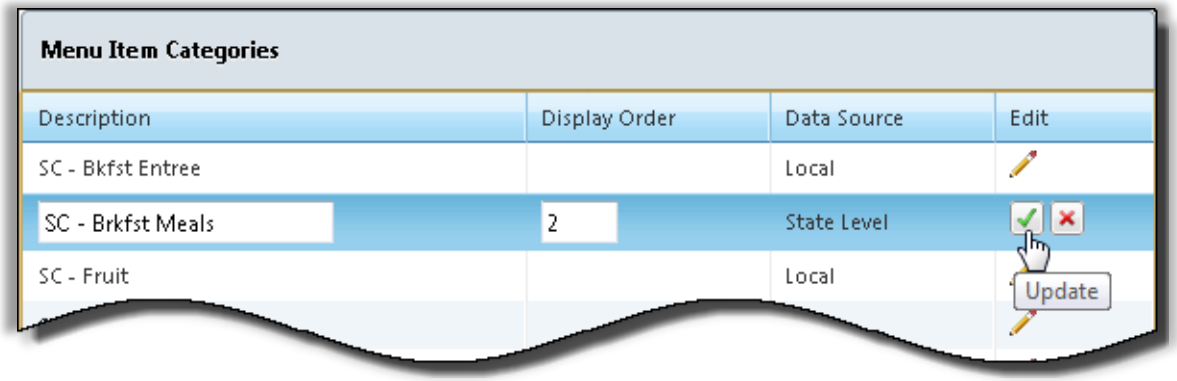


Updating Category Details

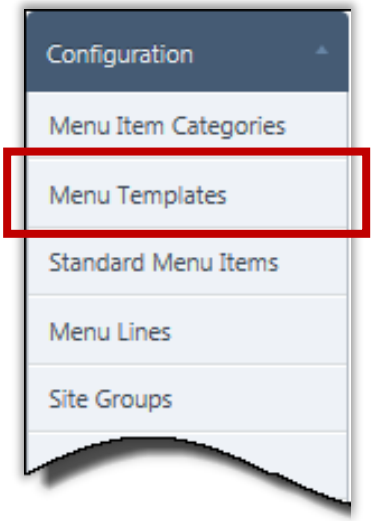
To update Menu Item Category details

1. Click **Edit** ( ) in a category listing,
2. In the editable category listing, change the Category **Description** text.
3. Enter a new **Display Order** value, if needed.
4. Click **Update** ( ).



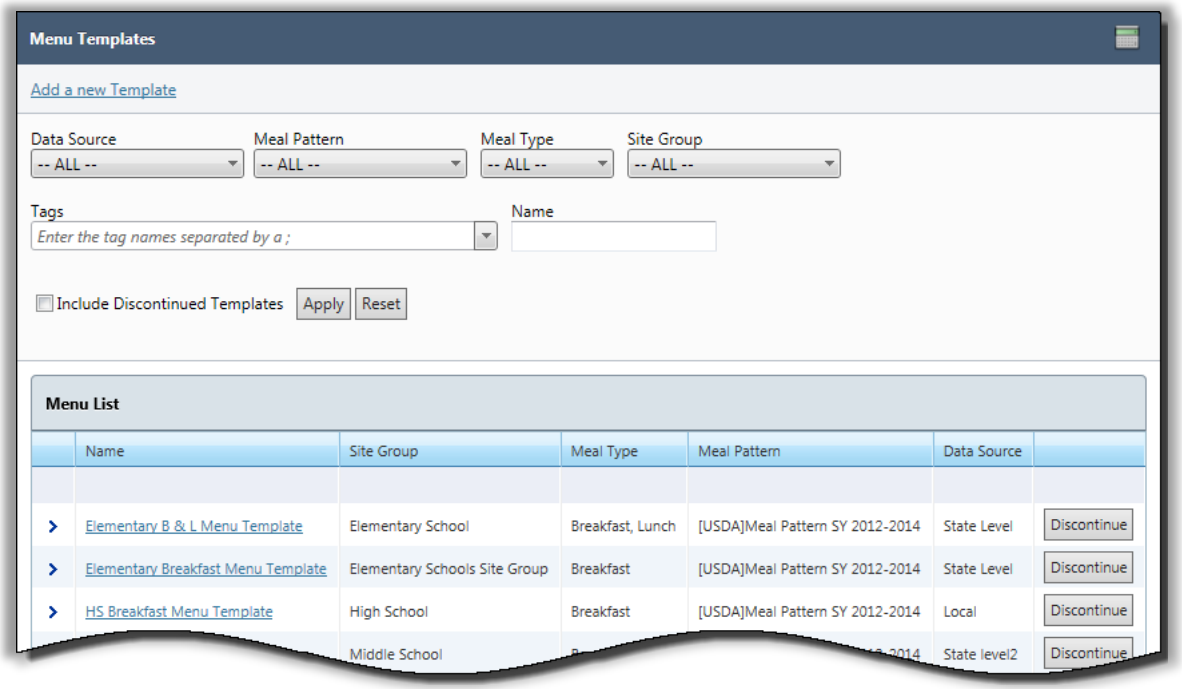


Menu Templates



Menu Templates support the creation of menus more quickly. A Menu Template is a base of all Menu details shared by all or most Menus, such as Serving Groups and Menu Items. Rather than performing repetitive actions for each new Menu, a Menu Template allows you to perform the actions once and then make a copy for new Menus.

Menu Templates Page



By default on the **Menu Templates** page:

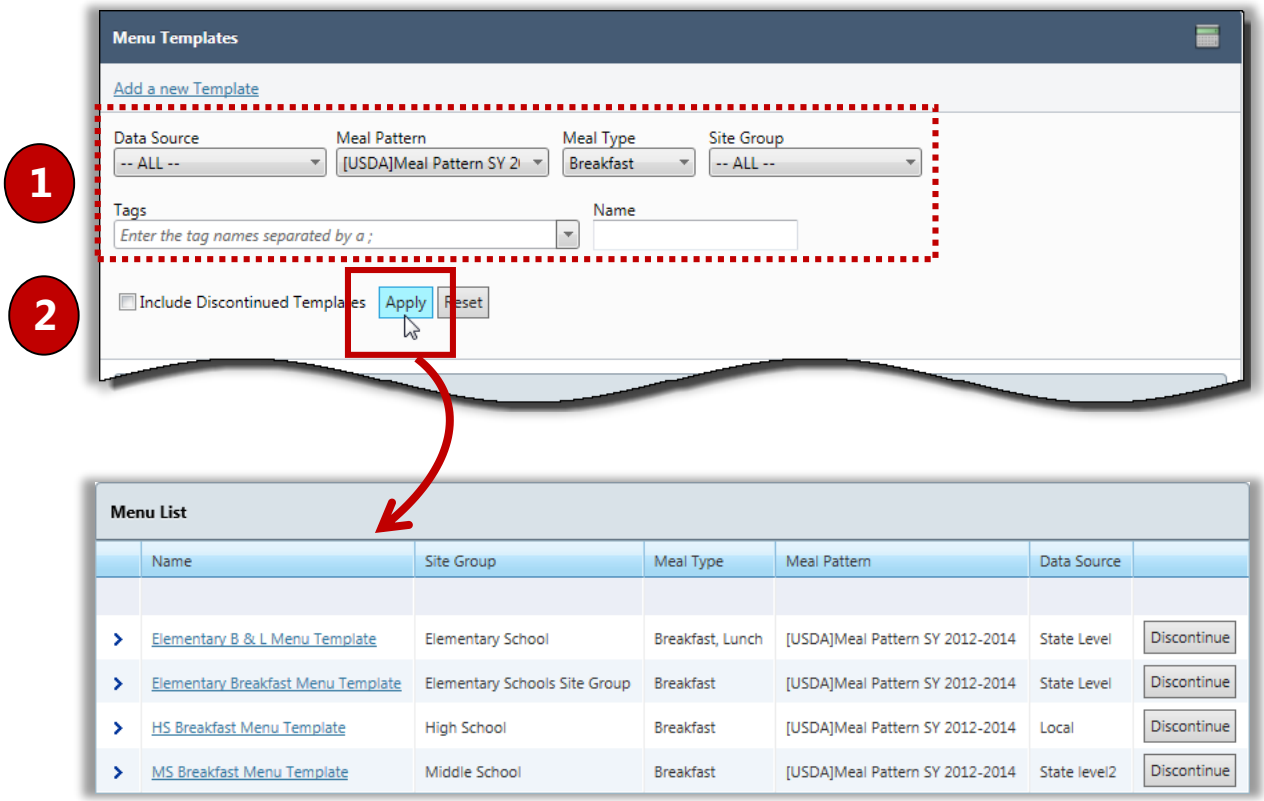
- **Meal Pattern**, **Meal Type**, and **Site Group** are set to "ALL".
- **Tags** and **Name** are blank (empty).
- **Include Discontinued Templates** is cleared.

Searching for a Menu Template

Six search conditions can be used in any combination to search for a Menu Template.

To search for a Menu Template

1. Enter one or more search conditions.
2. Click Apply .

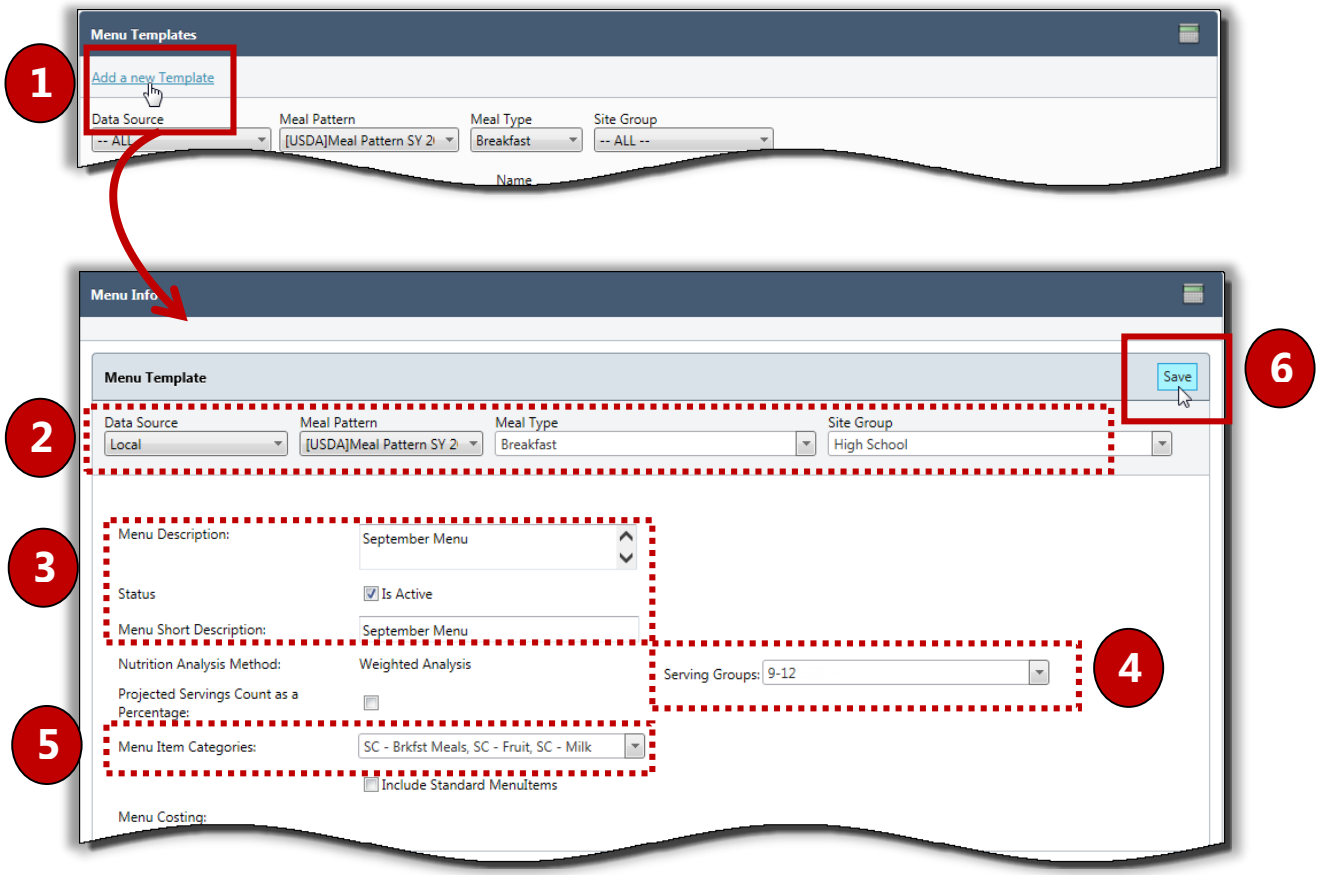


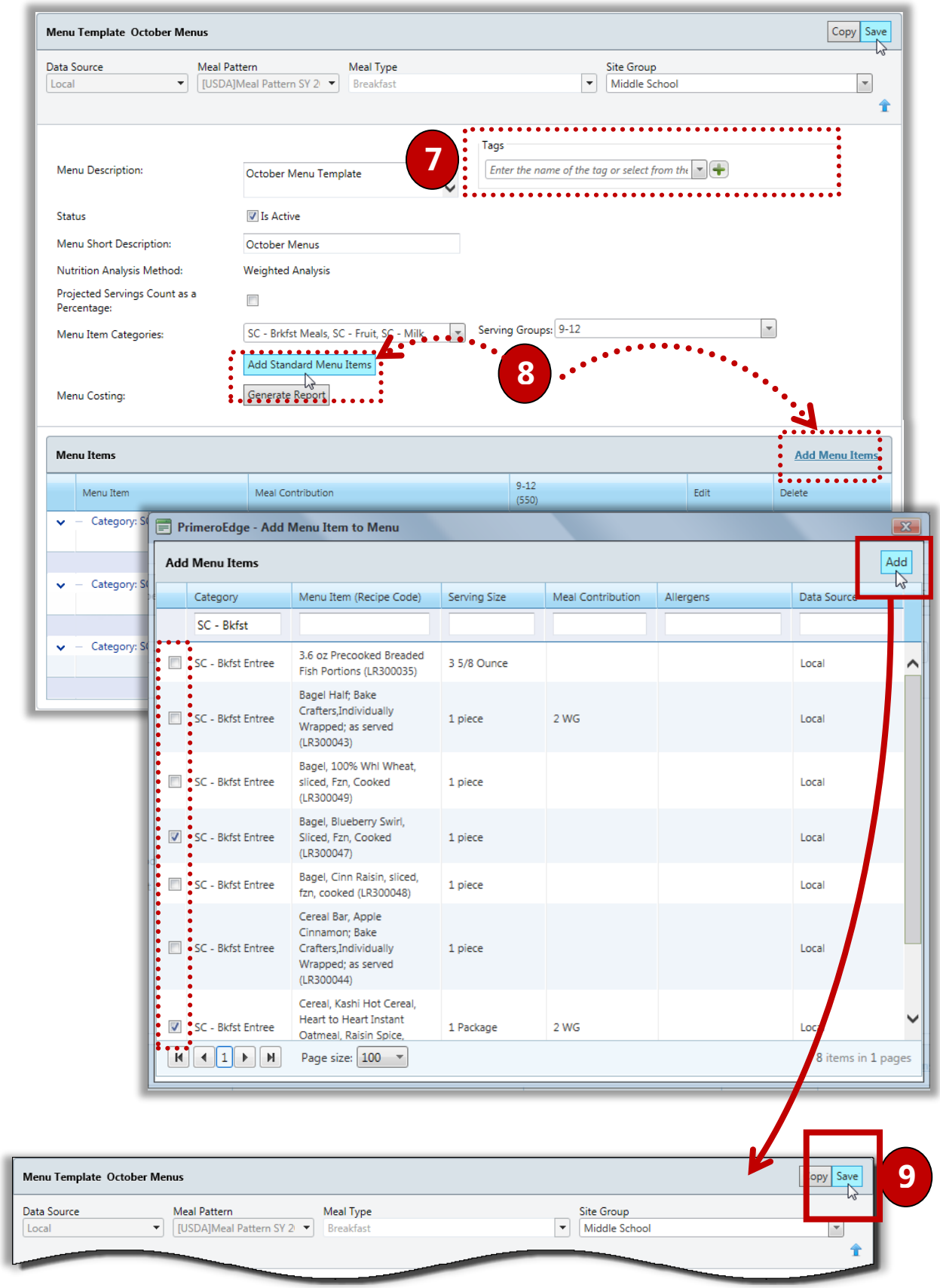
Adding a Menu Template

Adding a Menu Template follows the same basic steps as adding a Menu. However, you add only items that are common to all Menus that will be created with this template.

To add a Menu Template

1. Click the **Add a new Template** link.
2. Select a **Meal Type**, and select one or more **Meal Types** and one or more **Site Groups**.
3. Enter a **Menu Description** and a **Menu Short Description**.
4. Select one or more Serving Groups and enter Projected Serving Counts for each group.
5. Select one or more Menu Item Categories and enter the number of choice(s) for each.
6. Click Save .
7. Add one or more tags.
8. Add a set of Standard Menu Items and/or select individual Menu Items; add Projected Serving Counts for each.
9. Click Save .



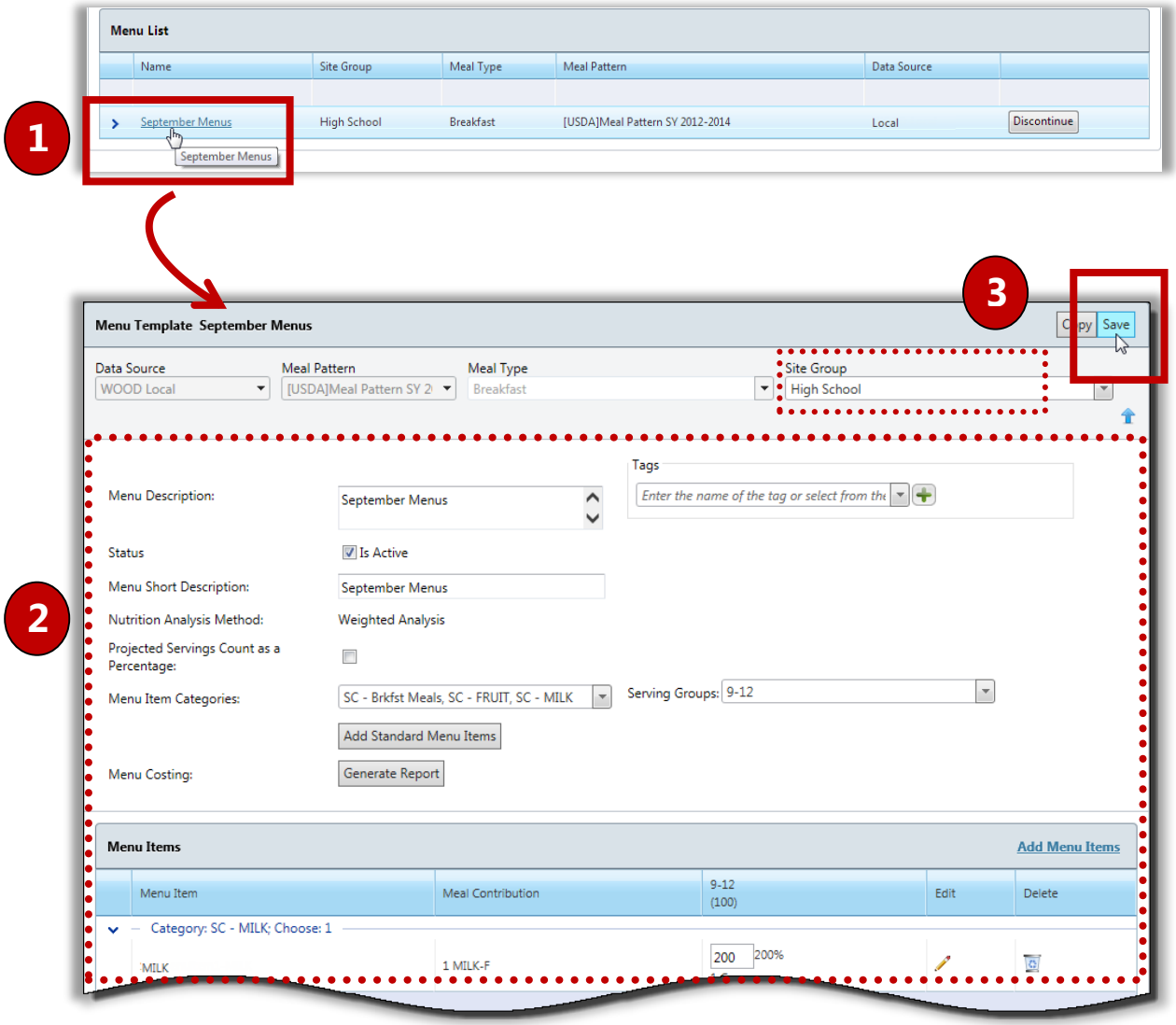

Menu Template October Menus
Copy
Save
Data Source
Local
Meal Pattern
[USDA]Meal Pattern SY 2
Meal Type
Breakfast
Site Group
Middle School
7
Tags
Enter the name of the tag or select from the
Menu Description:
October Menu Template
Status
Is Active
Menu Short Description:
October Menus
Nutrition Analysis Method:
Weighted Analysis
Projected Servings Count as a Percentage:
Menu Item Categories:
SC - Brkfst Meals, SC - Fruit, SC - Milk
Serving Groups:
9-12
Add Standard Menu Items
Generate Report
Menu Costing:
8
Menu Items
Add Menu Items
Menu Item
Meal Contribution
9-12 (550)
Edit
Delete
PrimeroEdge - Add Menu Item to Menu
Add Menu Items
Add
Category
Menu Item (Recipe Code)
Serving Size
Meal Contribution
Allergens
Data Source
SC - Bkfst
SC - Bkfst Entree
3.6 oz Precooked Breaded Fish Portions (LR300035)
3 5/8 Ounce
Local
SC - Bkfst Entree
Bagel Half; Bake Crafters,Individually Wrapped; as served (LR300043)
1 piece
2 WG
Local
SC - Bkfst Entree
Bagel, 100% Whl Wheat, sliced, Fzn, Cooked (LR300049)
1 piece
Local
SC - Bkfst Entree
Bagel, Blueberry Swirl, Sliced, Fzn, Cooked (LR300047)
1 piece
Local
SC - Bkfst Entree
Bagel, Cinn Raisin, sliced, fzn, cooked (LR300048)
1 piece
Local
SC - Bkfst Entree
Cereal Bar, Apple Cinnamon; Bake Crafters,Individually Wrapped; as served (LR300044)
1 piece
Local
SC - Bkfst Entree
Cereal, Kashi Hot Cereal, Heart to Heart Instant Oatmeal, Raisin Spice,
1 Package
2 WG
Page size: 100
8 items in 1 pages
Menu Template October Menus
Save
9
Data Source
Local
Meal Pattern
[USDA]Meal Pattern SY 2
Meal Type
Breakfast
Site Group
Middle School

Updating a Menu Template

Menu Template details can be changed except for **Meal Pattern** and **Meal Type**.

To update a Menu Template

1. Click the Menu Template Name link in the **Menu List**.
2. Make changes to **Site Groups**, **Menu Description**, **Tags**, **Serving Groups** and Projected Serving Counts, **Menu Item Categories** and choice(s), and **Menu Items** and Menu Item counts, as needed.
3. Click Save .

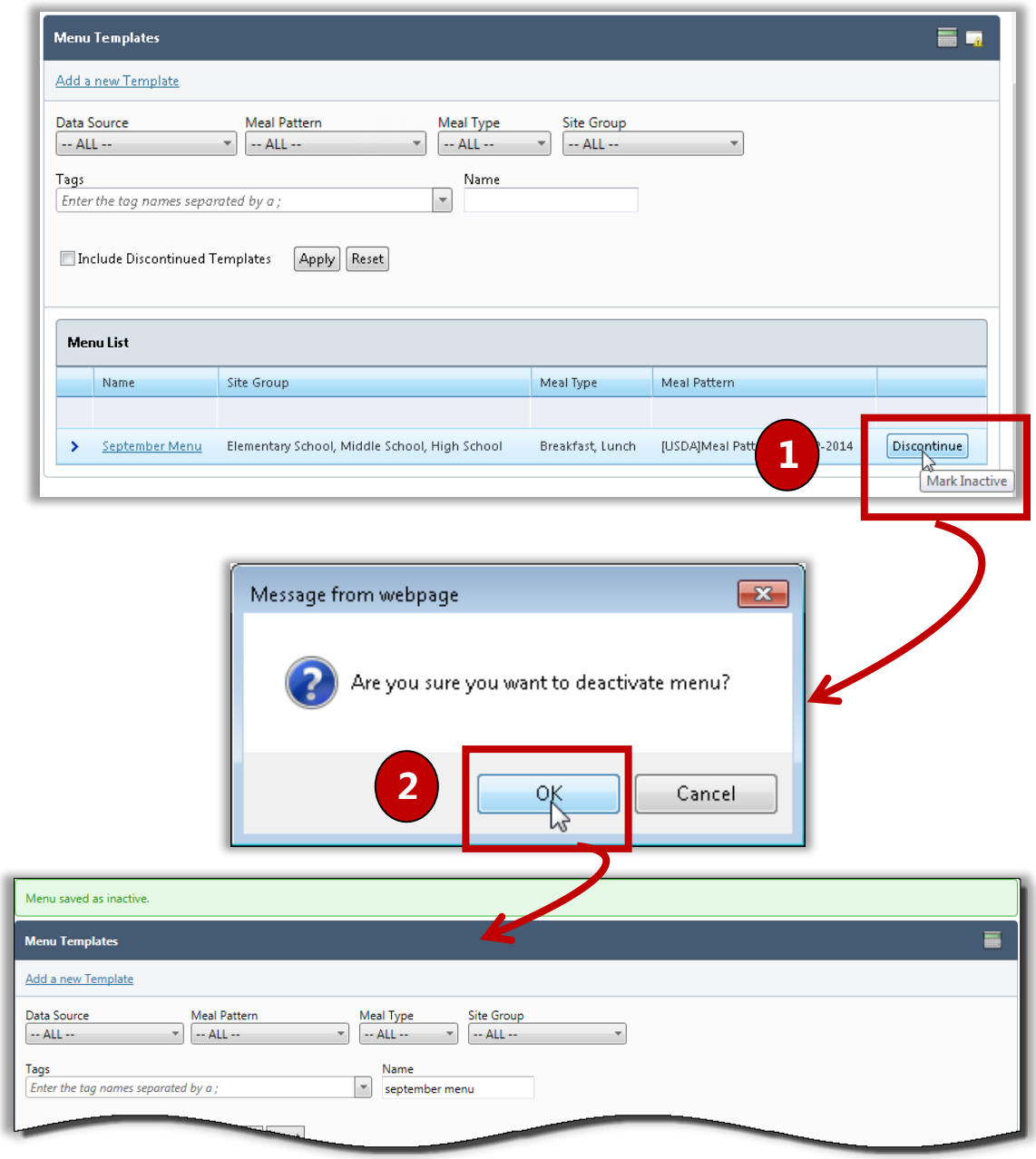


Discontinuing a Menu Template

Menu Templates are never removed. However, a Menu Template can be discontinued or made inactive using one of two procedures. The second method is to clear the **Is Active** option on the **Menu Template** page and save.

To discontinue a Menu Template

1. Click Discontinue in a Menu Template listing.
2. Click OK .

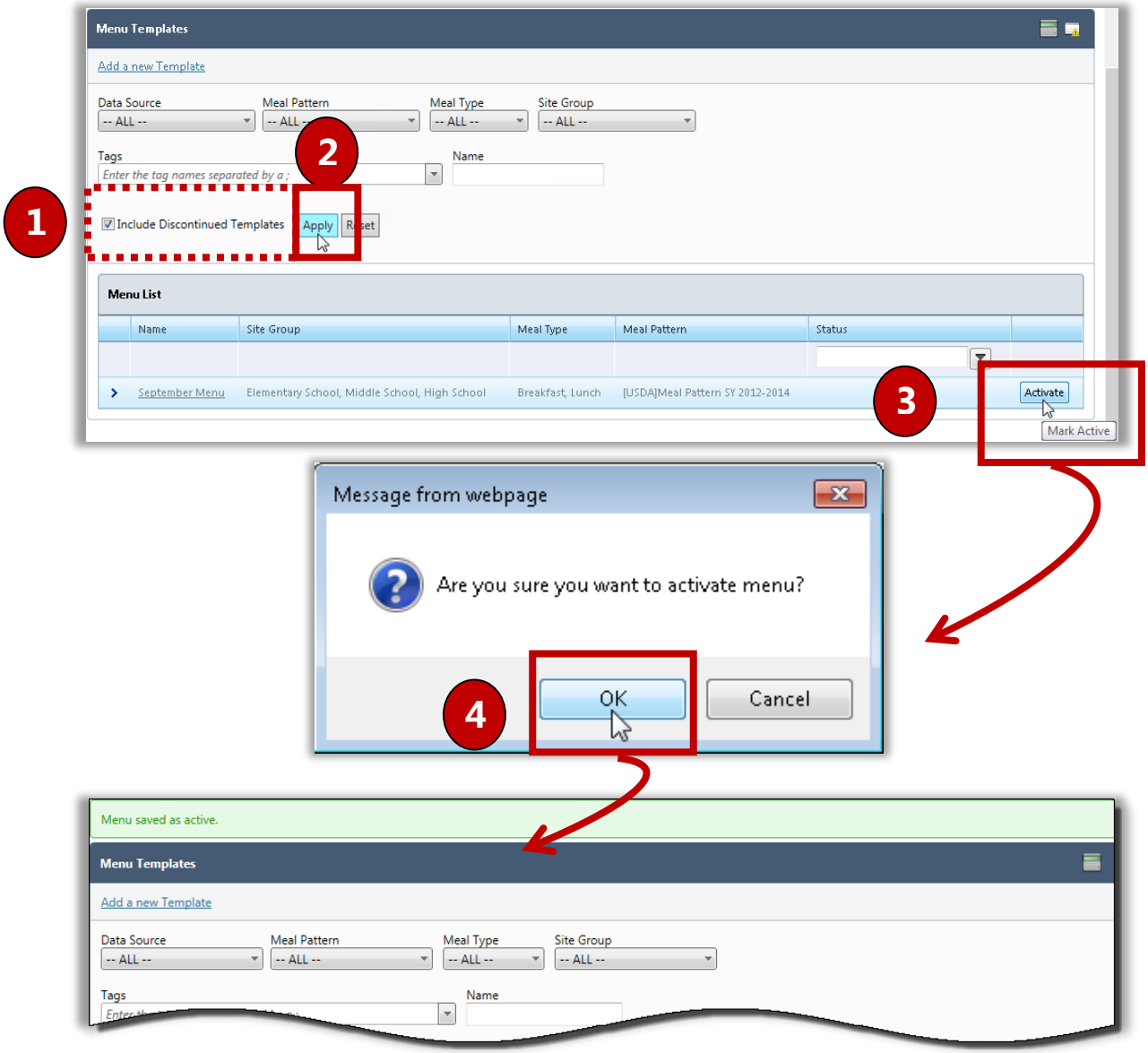


Activate a Discontinued Menu Template

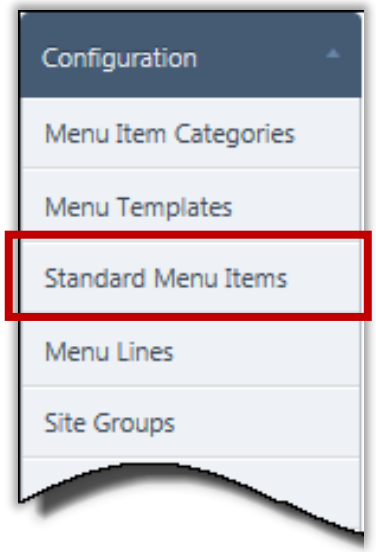
A Menu Template can also be reactivated by selecting the **Is Active** option on the Menu Template page and saving the change.

To activate a discontinued Menu Template

1. Select **Include Discontinued Templates**.
2. Click Apply .
3. Click Activate in a Menu Template listing in the **Menu List**.
4. Click OK in the confirmation message.



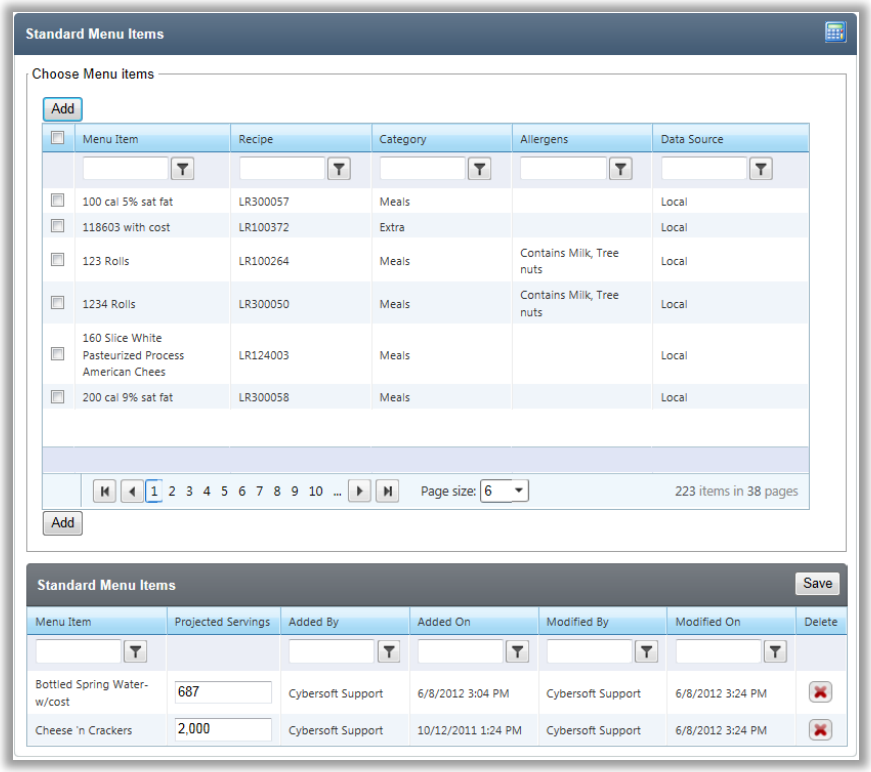
Standard Menu Items



Standard Menu Items are those items that are included on many or all Menus, such as milk, fruit, bread, etc. This menu function maintains the list of menu items that are added to a Menu when Add Standard MenuItems is clicked on the **Menu Info** page. Adding Standard Menu Items eliminates adding each Menu Item one at a time making the Menu Planner's job quicker and easier.

After adding Standard Menu Items, individual items may be removed from the menu as needed.

Standard Menu Items Page



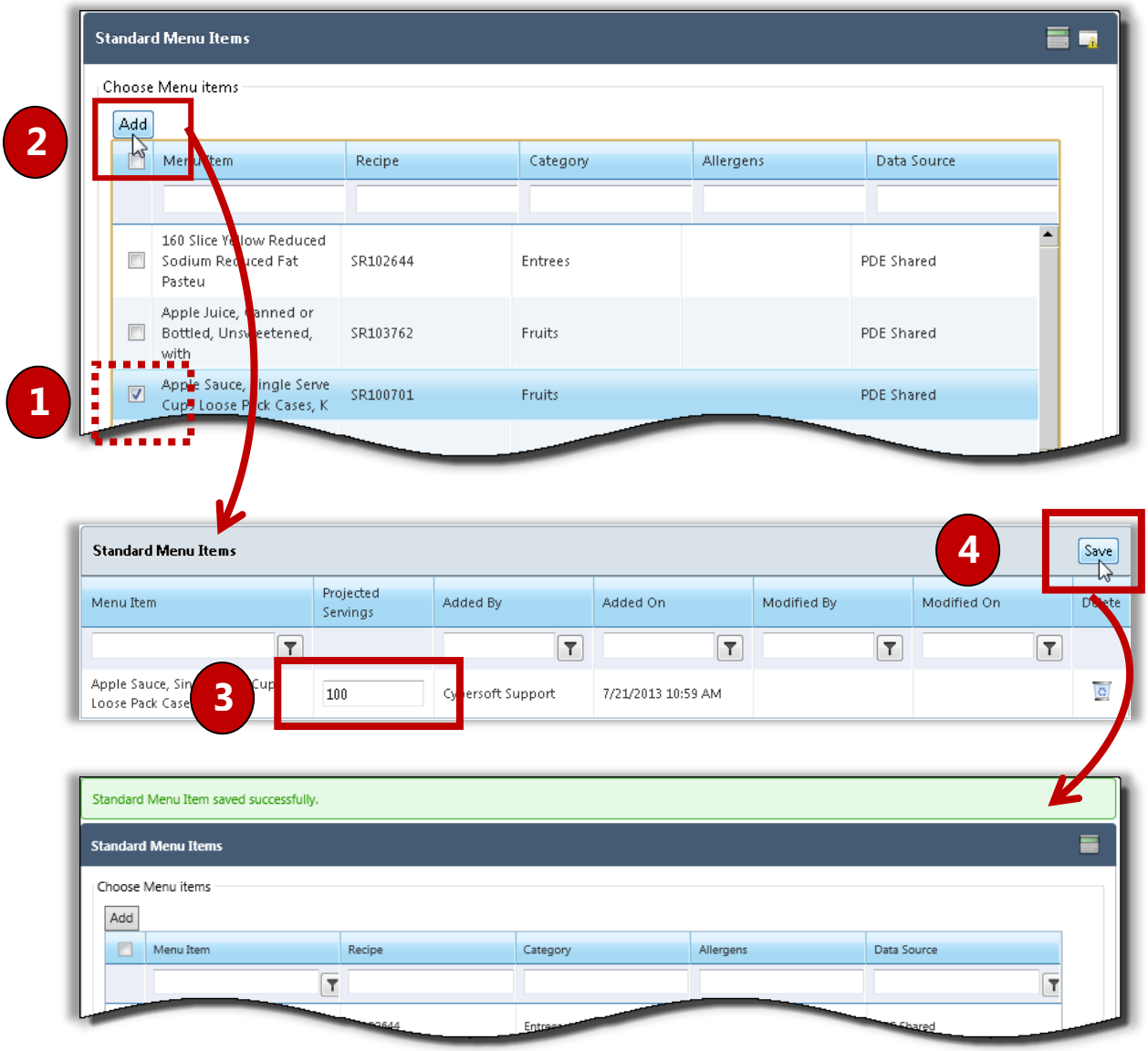
By default on the **Standard Menu Items** page:

- All existing menu items are listed in the **Choose Menu Items** group.
- All current Standard Menu Items are listed in the **Standard Menu Items** group.

Adding a Standard Menu Item

To add a Standard Menu Item

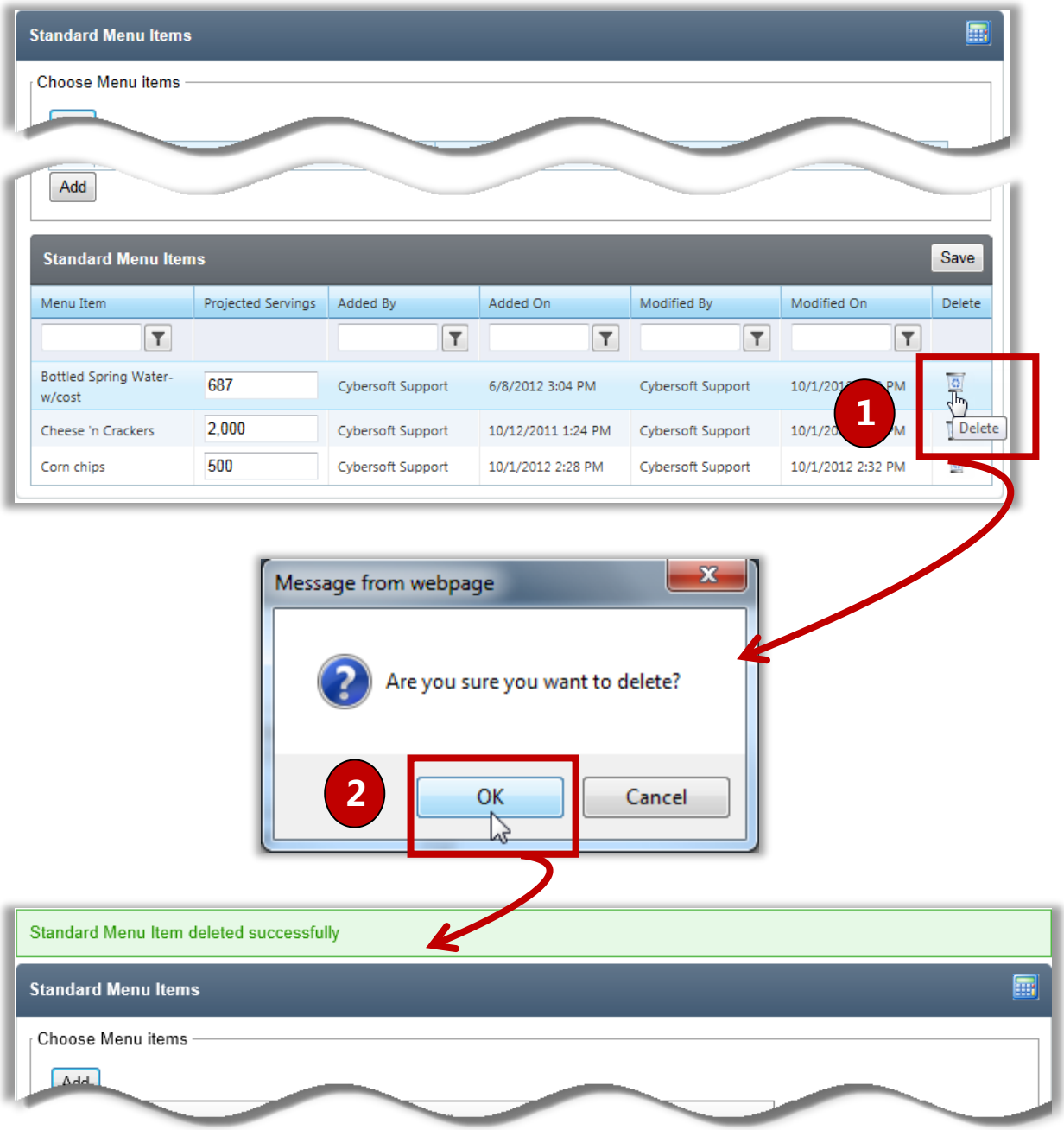
1. Select one or more items in the **Choose Menu Items** list; use the filters in each column to narrow the display of menu items.
2. Click Add .
3. Enter the Projected Serving Counts for each added Menu Item.
4. Click Save .



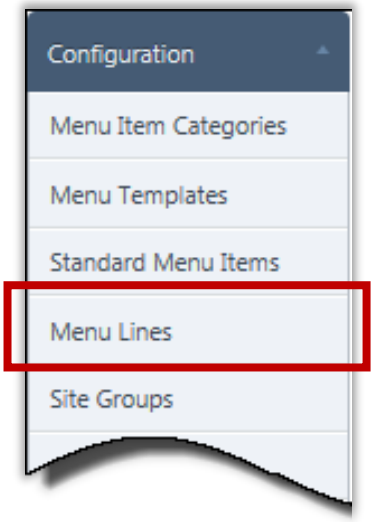
Deleting a Standard Menu Item

To remove a Standard Menu Item

1. Click **Delete (** **)** in a Standard Menu Item listing.
2. Click OK .



Menu Lines



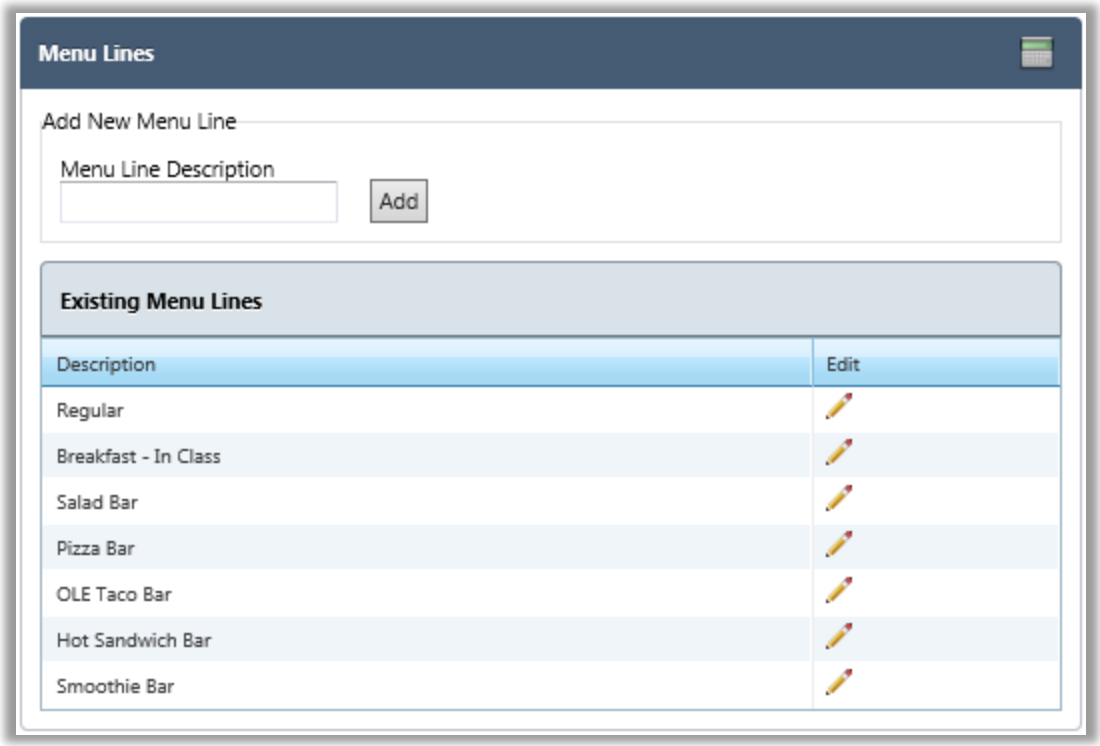
Menu Lines adds menu lines and updates menu line descriptions. Menu Lines are created when different production records are needed for the same meal type.

Menu Lines are often created around a theme. For example, a Regular Breakfast Menu Line could be one served in the cafeteria and the Classroom Breakfast Menu Line could be served in a classroom. Both menu lines are for the breakfast meal type but serve different items.

Menu Lines are used when creating and assigning Menus, Menu Cycles, Menu Templates and configuring sites.

Menu Lines cannot be removed; a **Menu Line Description** can be changed as often as necessary.

Menu Lines Page



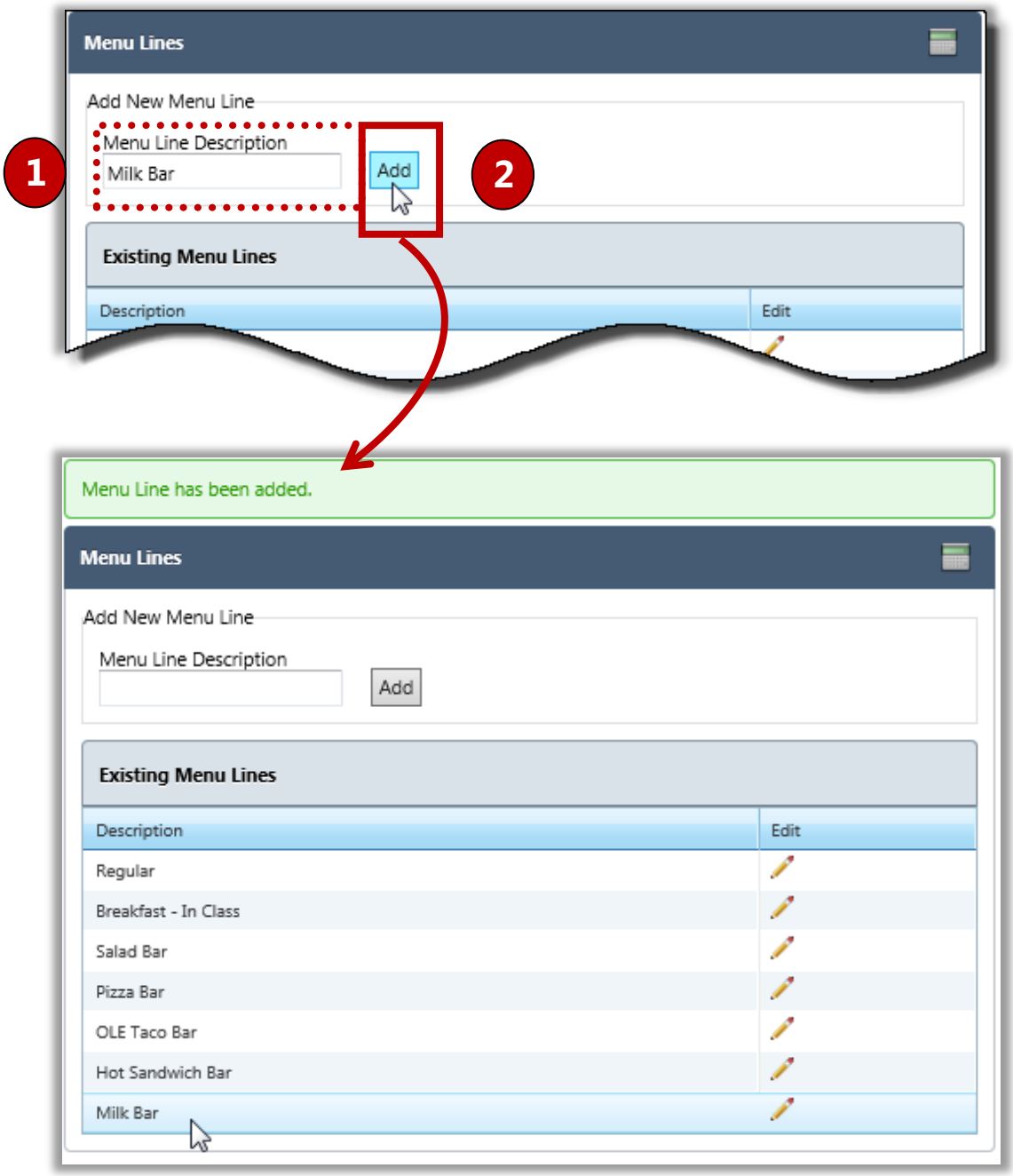
By default on the **Menu Lines** page:

- **Menu Line Description** is blank.
- Existing Menu Lines are shown in the **Existing Menu Lines** list.

Adding a Menu Line

To add a Menu Line

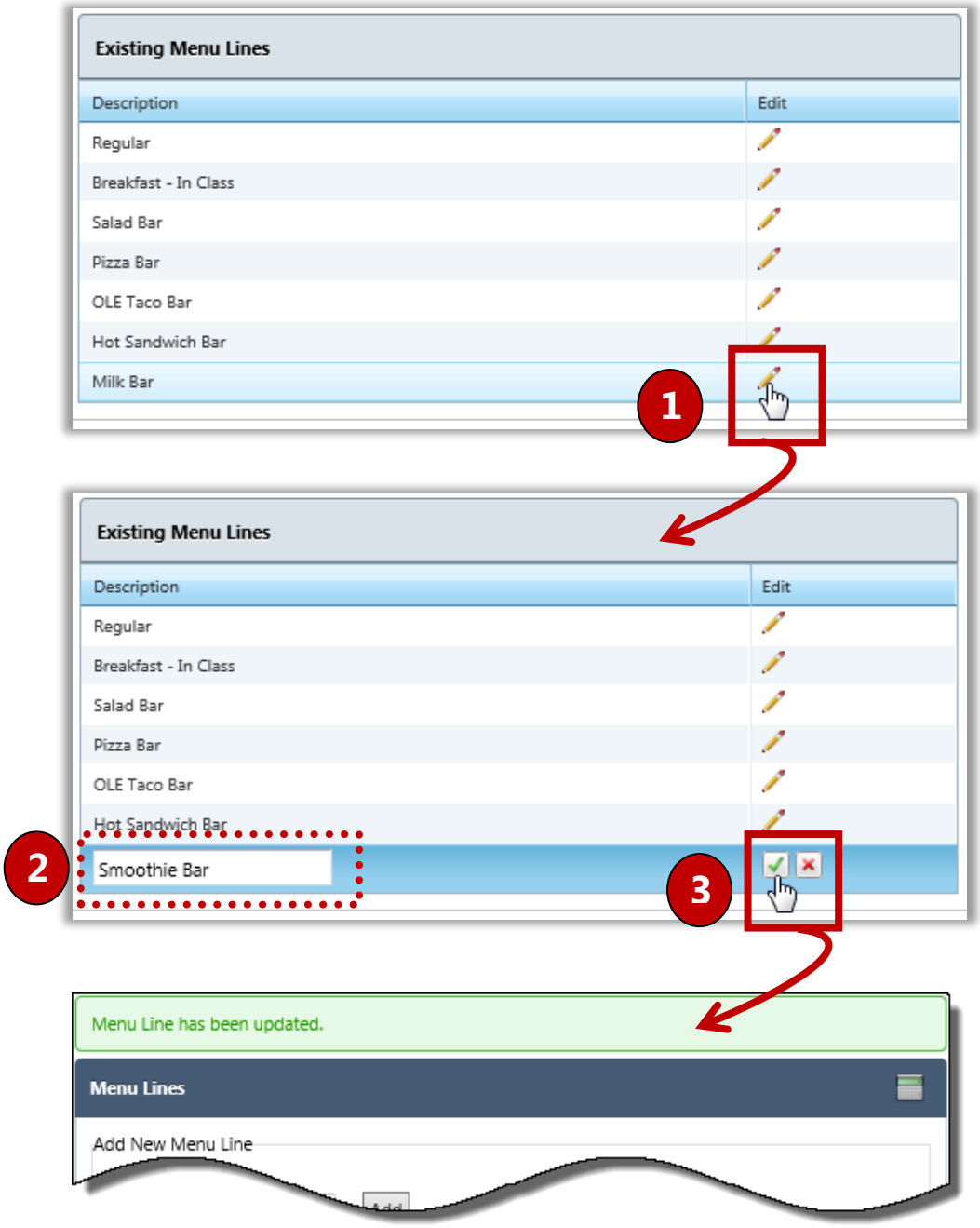
1. Enter a name for the new menu line in **Menu Line Description**.
2. Click Add .



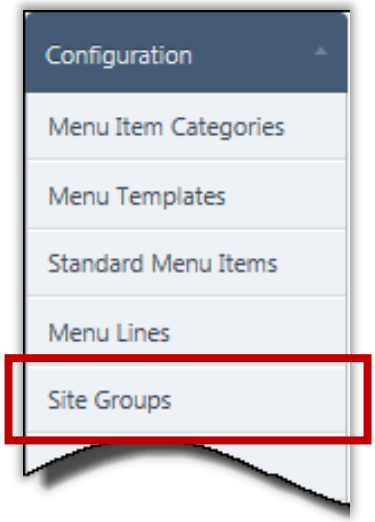
Updating a Menu Line Description

To update a Menu Line description

1. Click **Edit** ( ) in a menu listing.
2. Change the text in **Menu Line Description** as needed.
3. Click **Update** ( ).



Site Groups

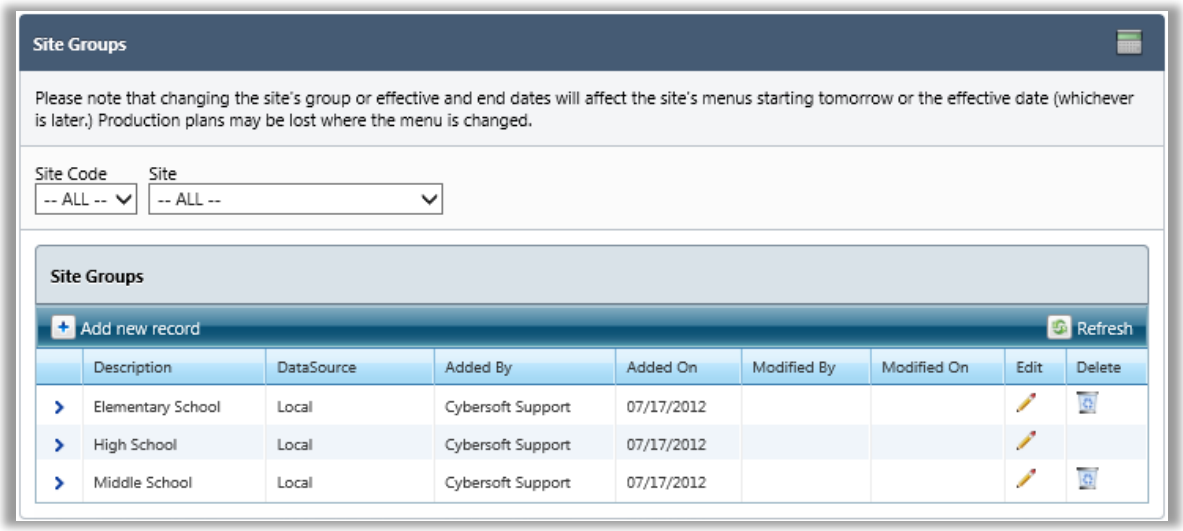


Site Groups organizes feeding sites into groups to make creating and assigning Menus easier and quicker. Creating a Site Group is as simple as clicking one button to automatically place all sites into a group according to the assigned Site Code. Or, you can create local (custom) groups and individually add sites to the groups.

Site Groups are used when creating Menus and Menu Cycles, and when Assigning Menus.

A Site Group can be removed until a site is assigned to the group. When a Site is assigned to a Site Group the **Delete** icon ( ) no longer appears in the **Delete** column in the Site Group listing..

Site Groups Page

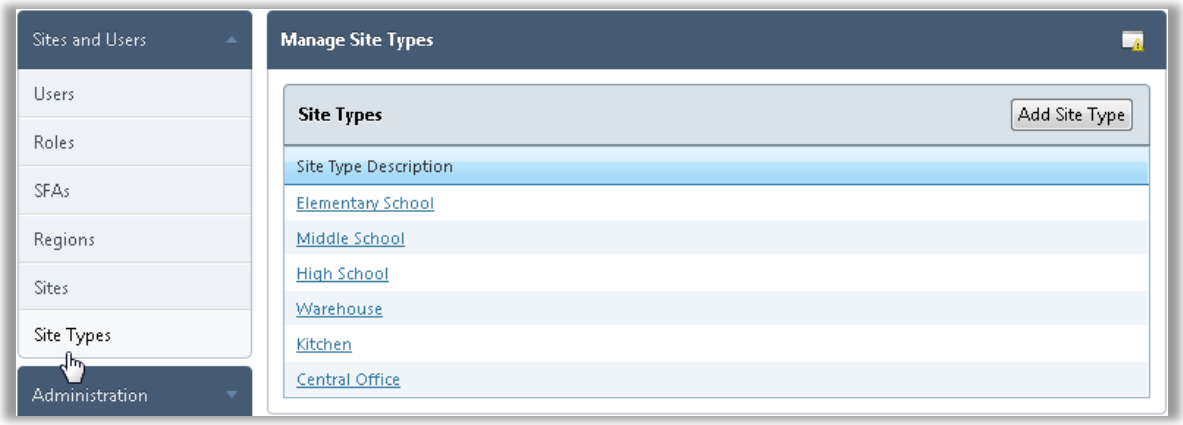


By default on the **Site Groups** page:

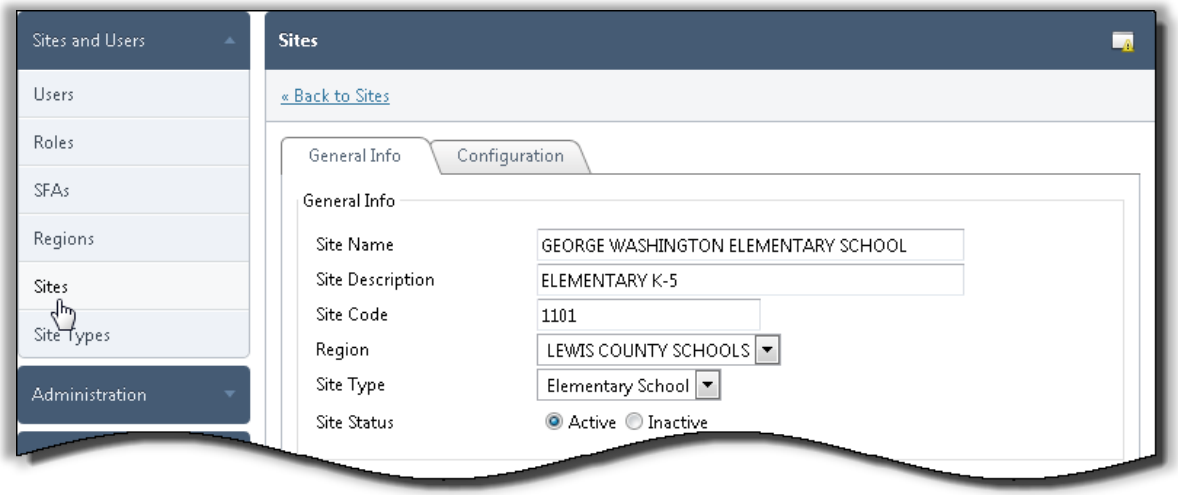
- All existing site groups are listed.
- Site group details are hidden.

Adding Site Groups by Site Type

The quick way to create Site Groups and assign Sites to a group is to use "**Add Site types as groups**." One Site Group is automatically created for each Site Type listed on the **Manage Site Types** page in **[System] > Sites and Users** > **Site Types.** An example is shown below.

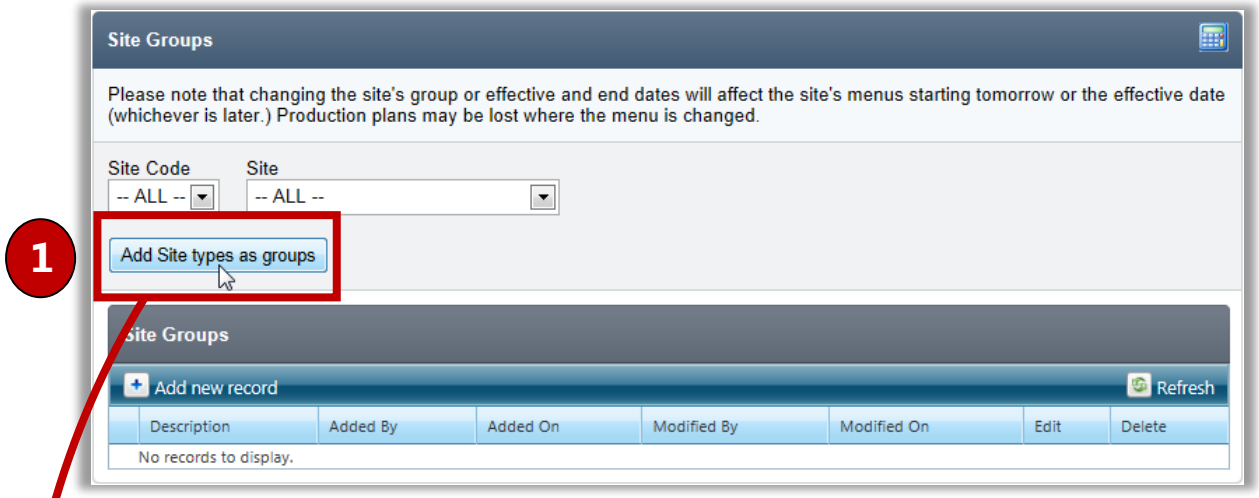


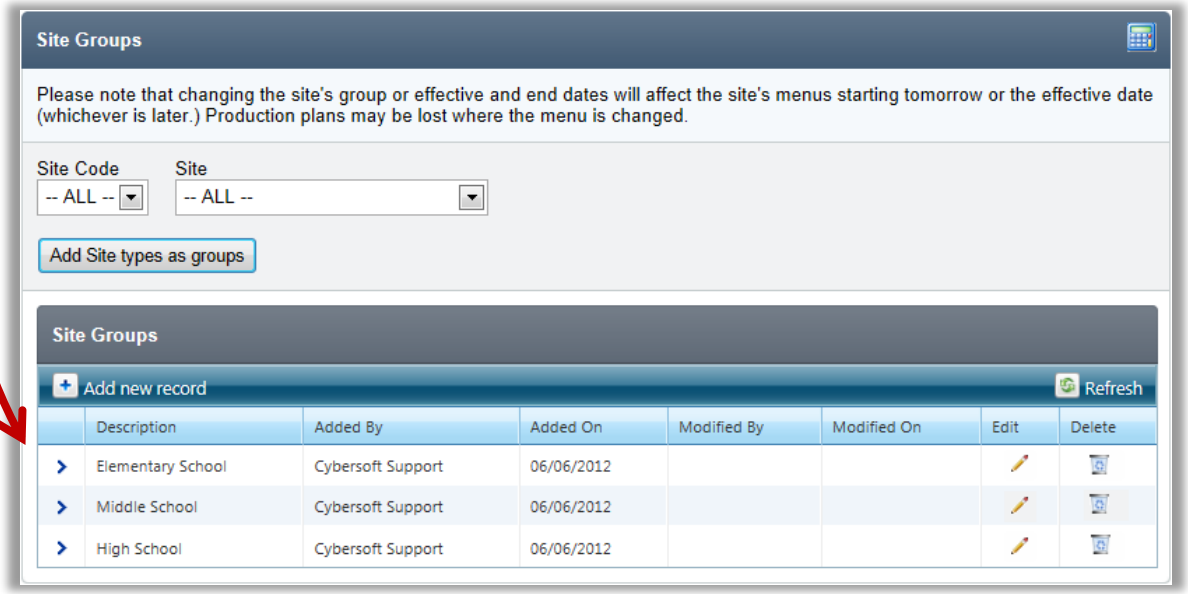
Each Site is then automatically assigned to a Site Group according to the Site Type selected for the Site on the **General** tab of the **Sites** page in **[System] > Sites and Users > Sites**. An example is shown below.



To create Site Groups for all Site Types

1. Click Add Site types as groups .





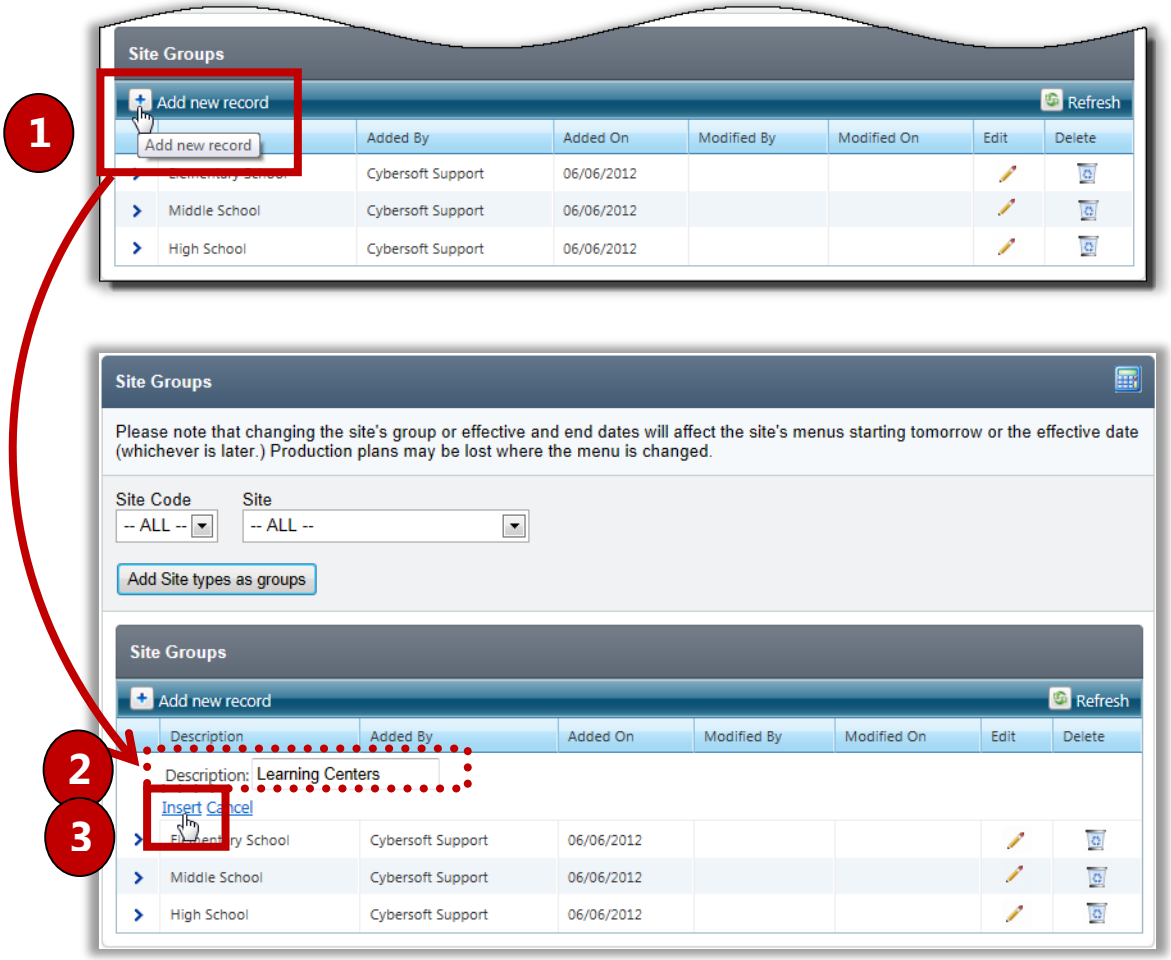
Adding a Site Group

Adding a custom Site Group allows you to create a group name of your choice. Individual Sites are then added to the Site Group.

To add an individual Site Group

1. Click

.
2. Enter a name for the Site Group in **Description**.
3. Click **Insert**.

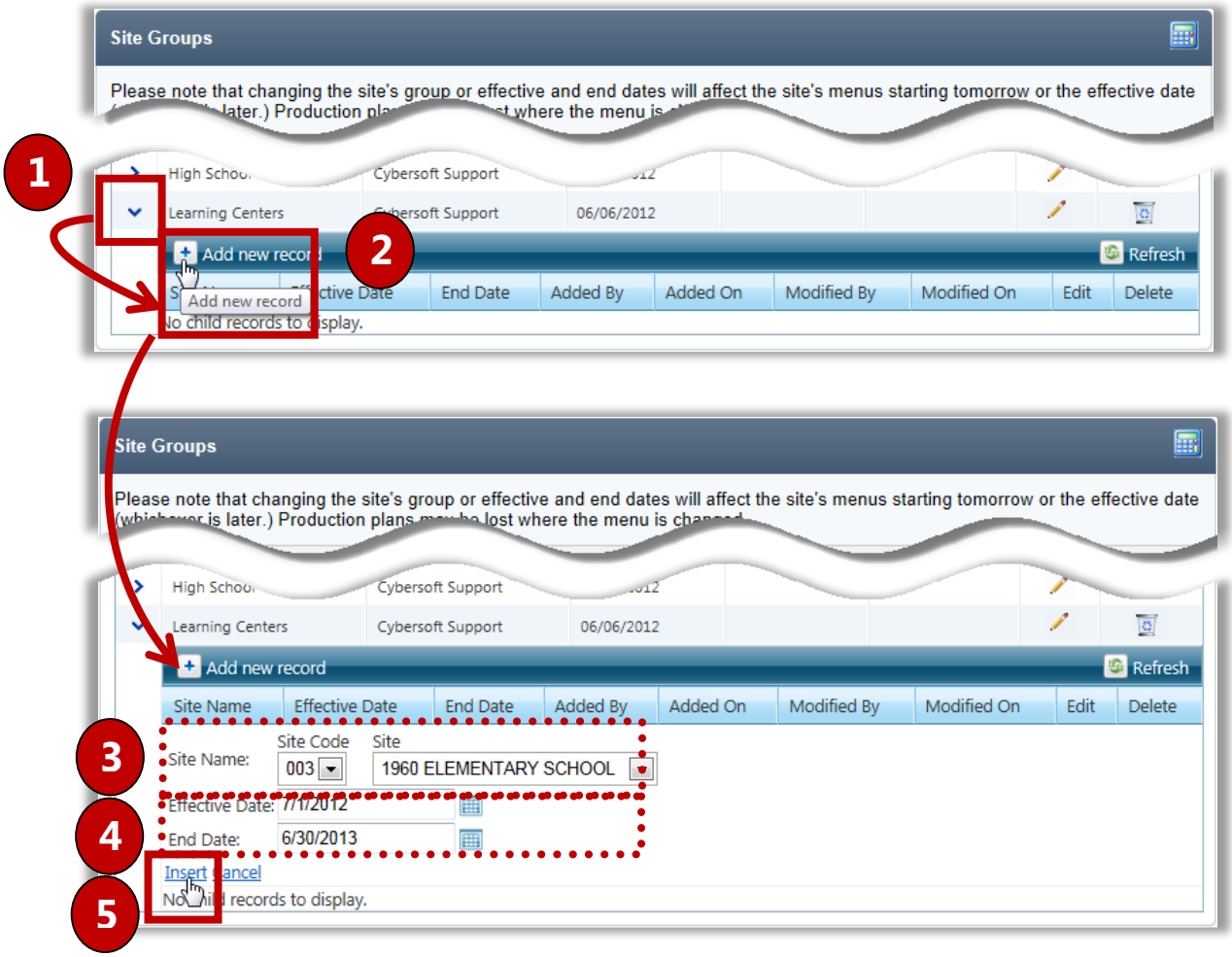


Adding a Site to a Site Group

After creating a custom Site Group, individual Sites are added one at a time. As many sites as are needed can be added to the group.

To add a Site to a Site Group

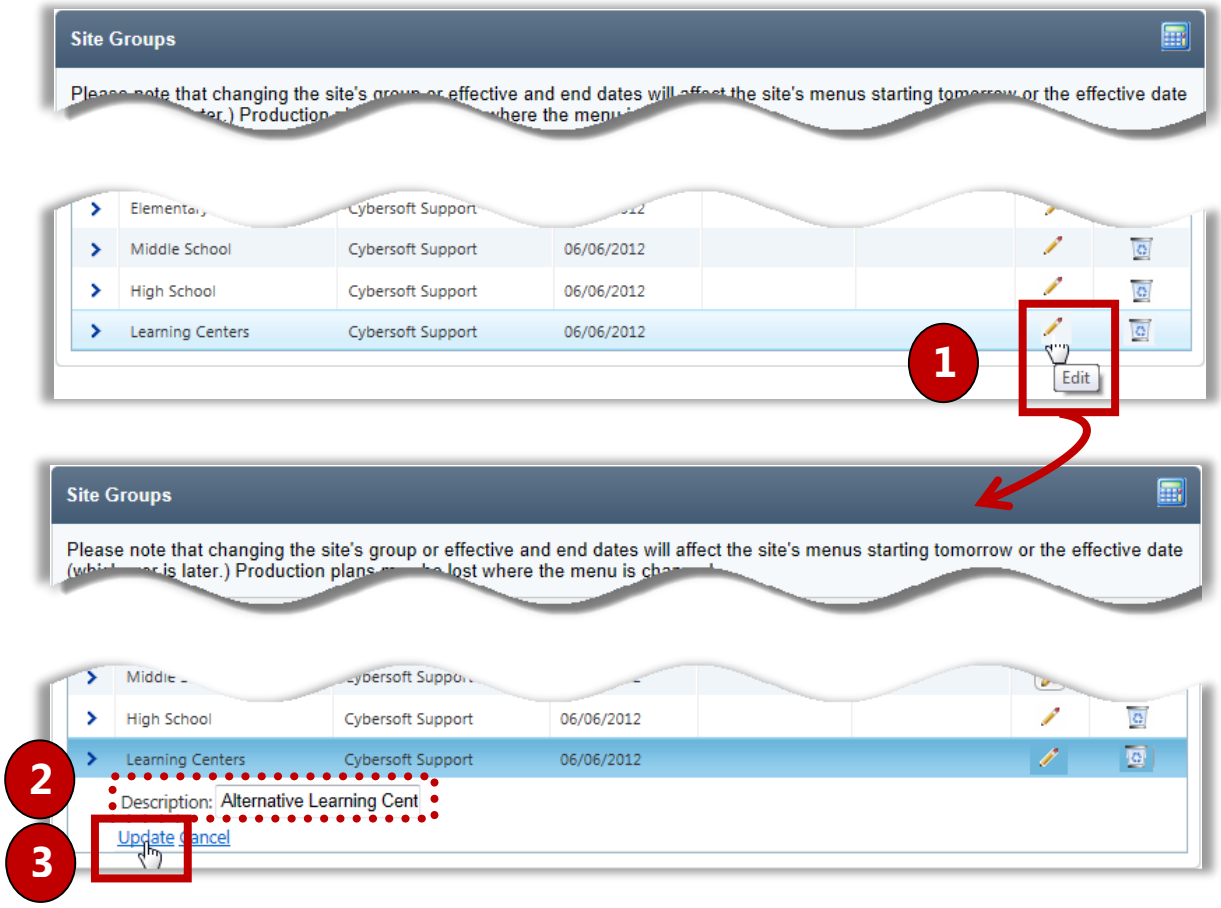
1. Click **Show** ( ) in a Site Group listing.
2. Click Add new record .
3. Select a **Site Code** or **Site**.
4. Enter a service start date in **Effective Date** and a service end date in **End Date**.
5. Click Insert.



Updating Site Group Details

To update Site Group details

1. Click **Edit** ( ) in a Site Group listing.
2. Make changes in **Description**, as needed.
3. Click **Update**.

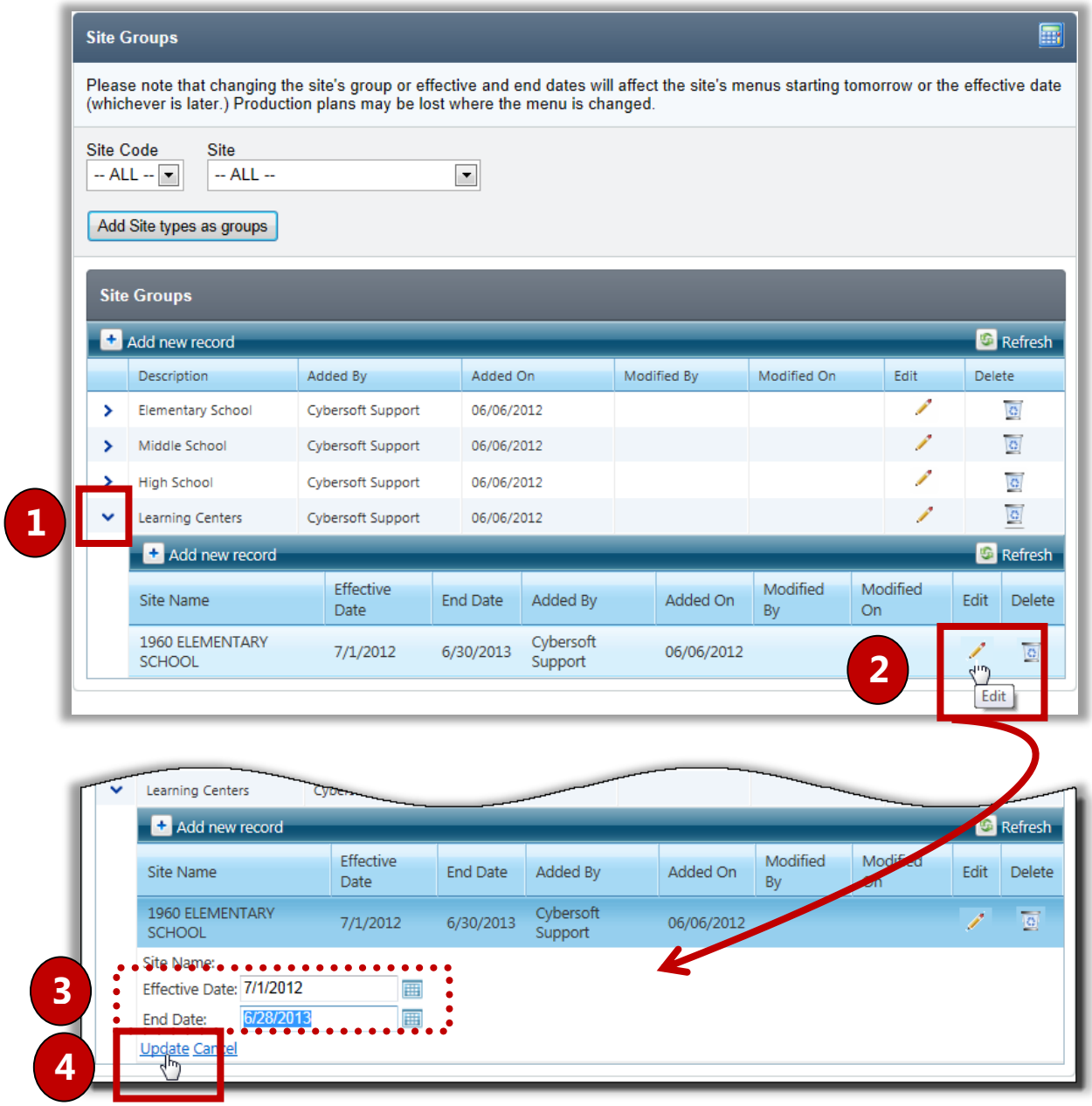


Updating Site Details

Changing Site information selects a new date when feeding begins or ends.

To change Site details

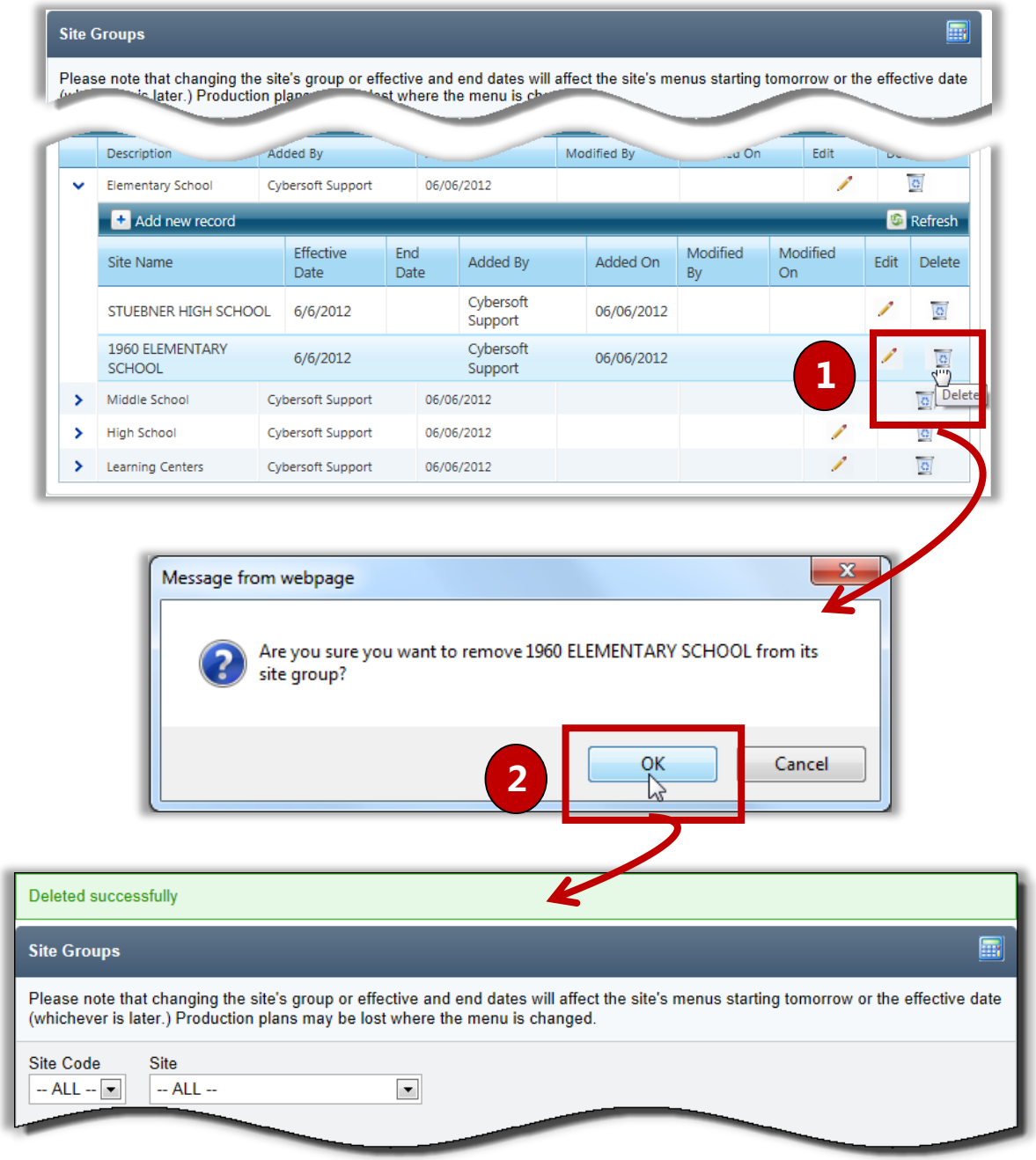
1. Click **Expand** ( ) in a Site Group listing.
2. Click **Edit** ( ) in a Site listing.
3. Enter or select a new **Effective Date** (Start Date) or **End Date**.
4. Click **Update**.



Deleting a Site in a Site Group

To delete a Site from a Site Group

1. Expand a Site Group.
2. Click **Delete** ( ) in a site listing.
3. Click OK .

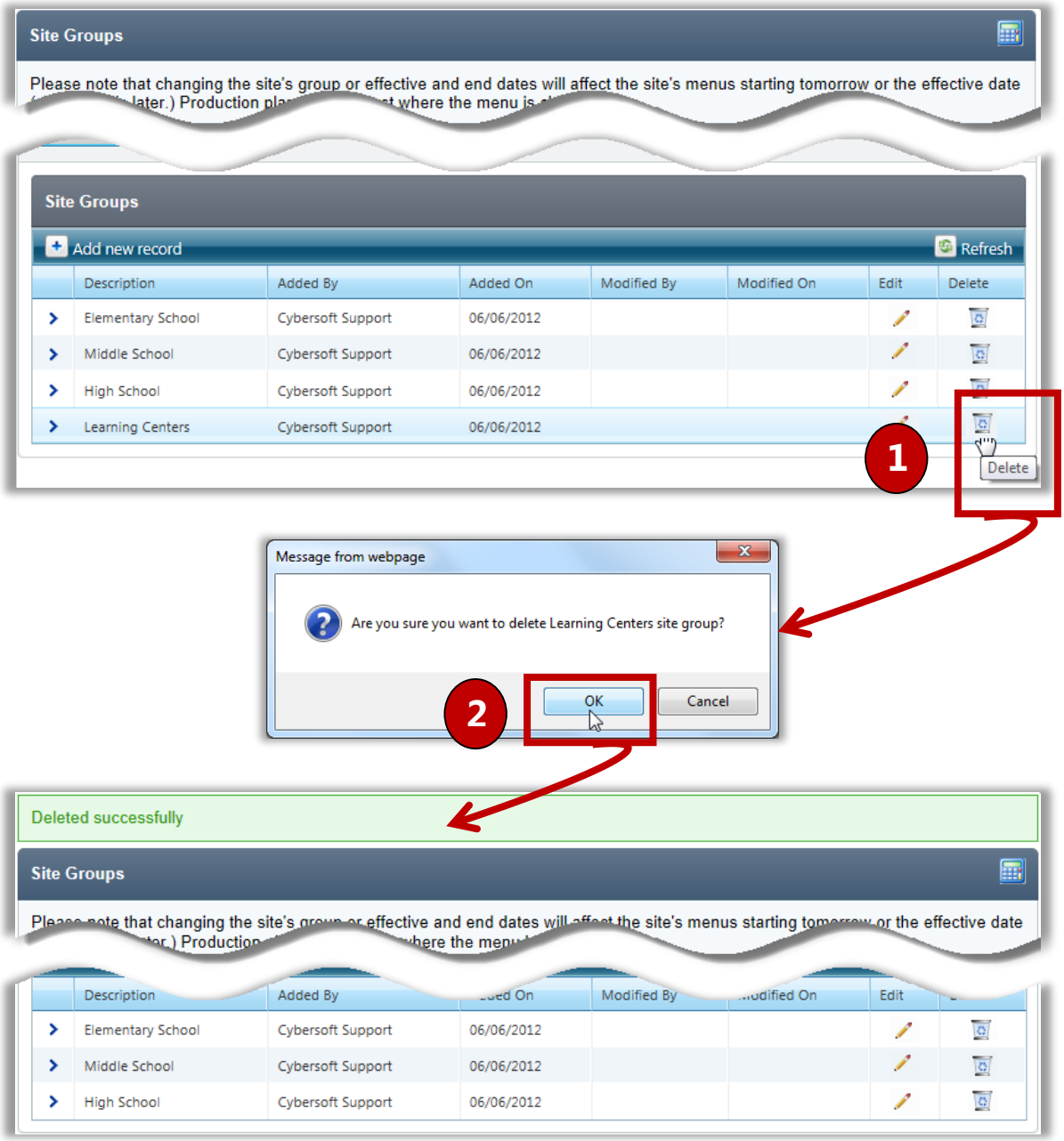


Deleting a Site Group

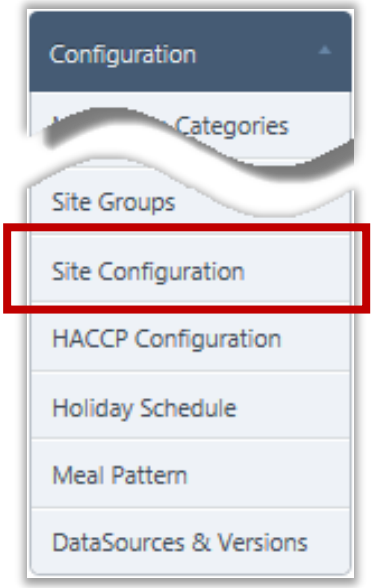
A Site Group can be removed (deleted) only if no Sites are included in the group.

To delete a site group

1. Click **Delete** ( ) in a Site Group listing.
2. Click OK .



Site Configuration

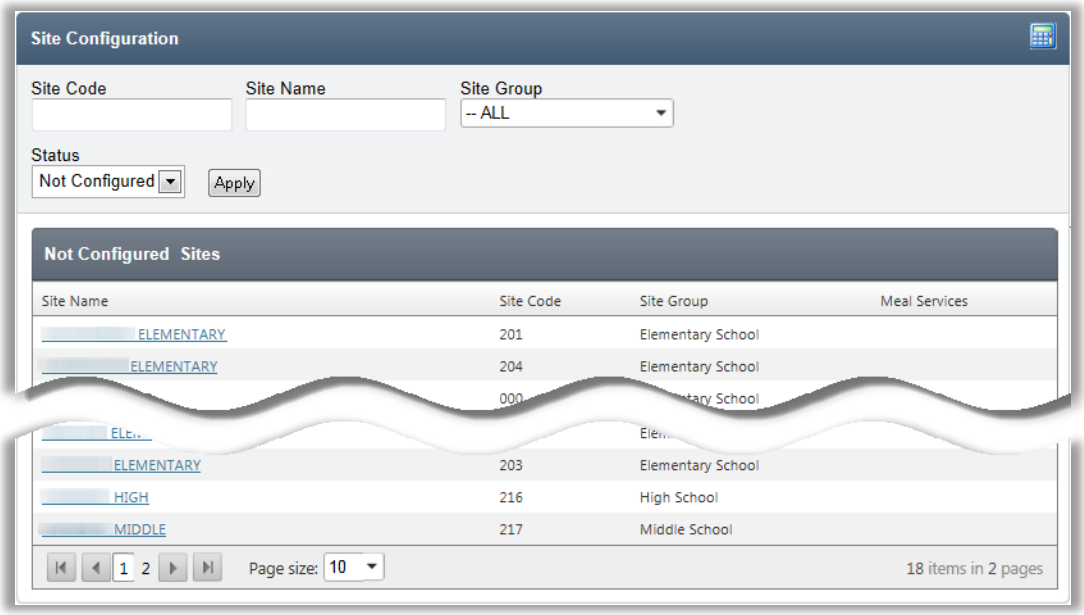


Site Configuration specifies for each feeding site:

- **Meal Service**(s) provided
- **Menu Lines** offered for each meal service
- **Site Group** to which the feeding site belongs
- Feeding **Effective Date** (Start Date)
- Feeding **End Date** (Stop Date)

A Site Configuration must be established for each feeding site to allow assignment of Menus on a Menu Calendar to the site.

Site Configuration Page



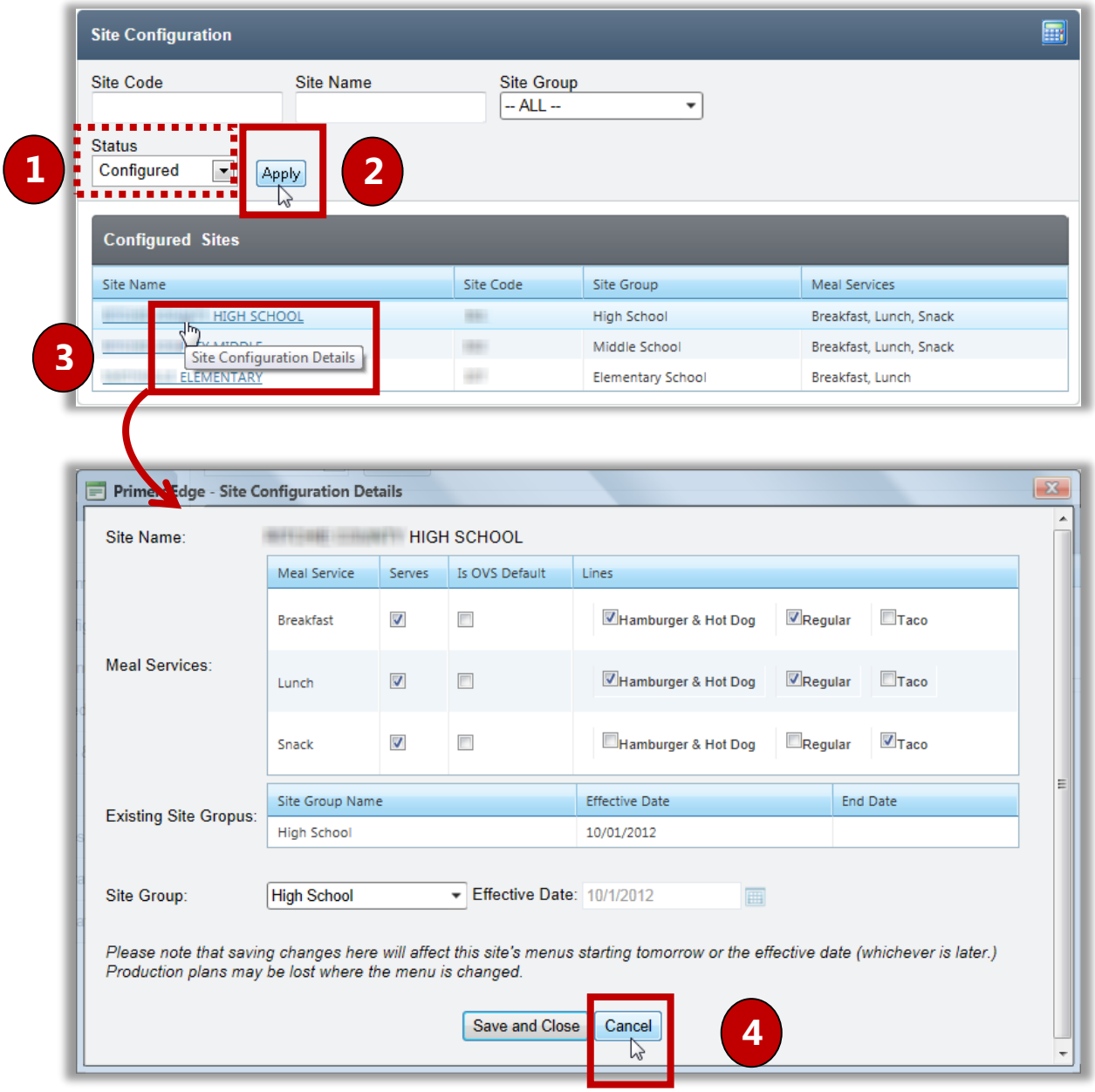
By default on the **Site Configuration** page:

- **Site Code** and **Site Name** are blank (empty)
- Site Group is set to "**ALL**"
- Status is set to "**Not Configured**"
- All non-configured sites are displayed in the **Not Configured Sites** list.

Displaying Site Configuration Details

To display configuration details for a site

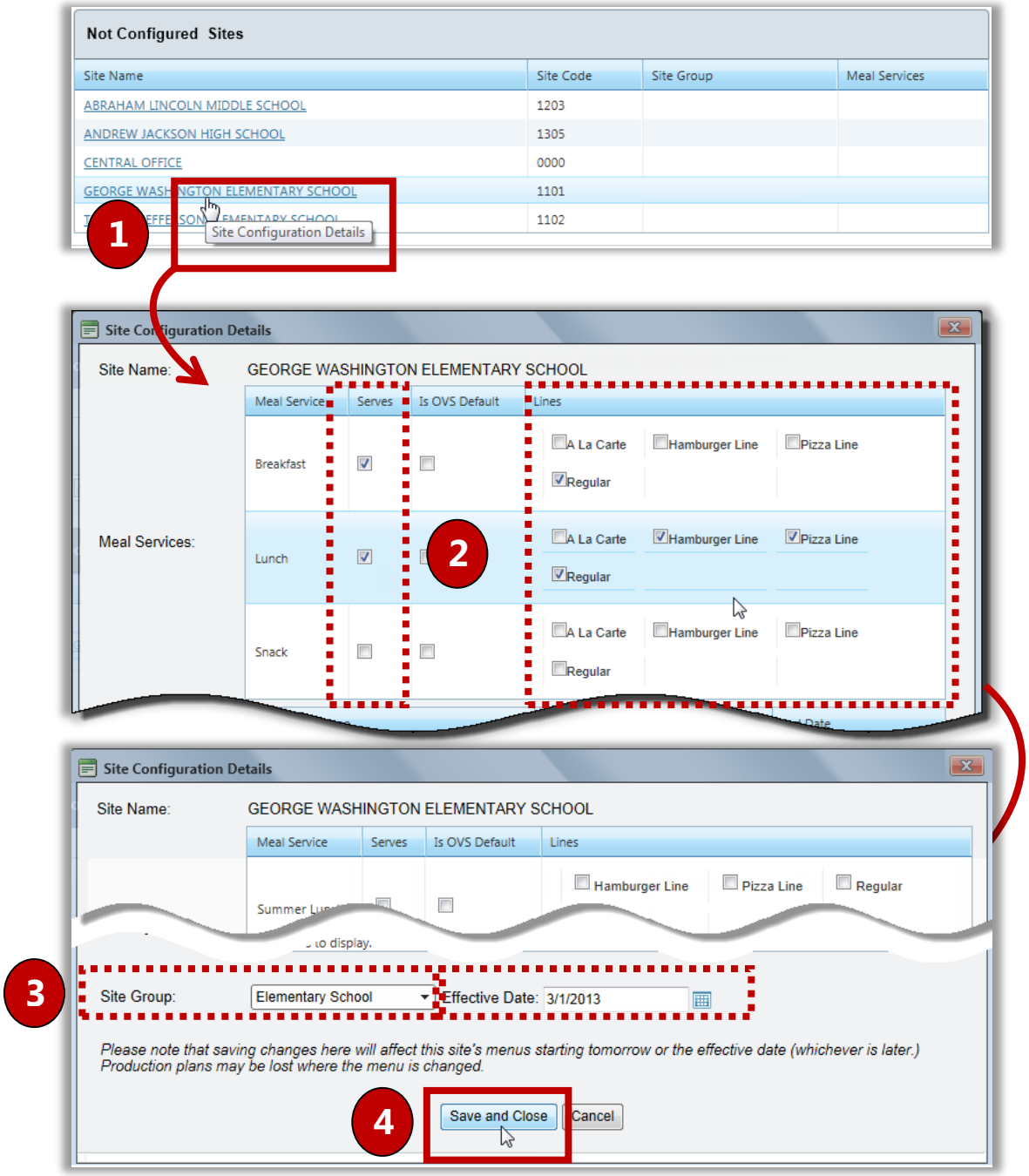
1. Select configured in **Status**.
2. Click Apply .
3. Click a Site Name link in a site listing.
4. Click Cancel to close the **Site Configuration Details** popup.



Configuring a Site

To configure a site

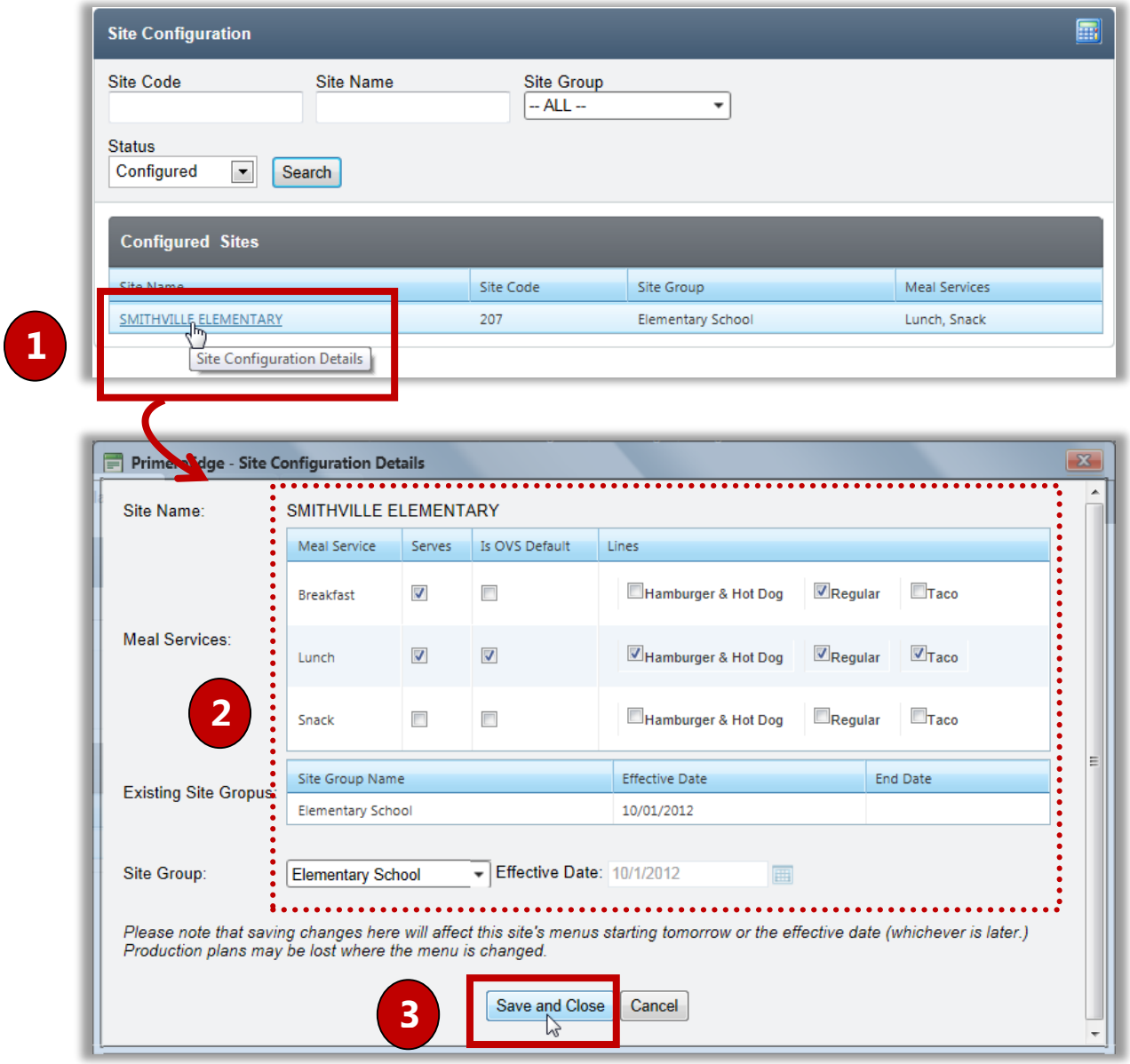
1. Click a **Site Name** link in the **Not Configured Sites** list.
2. Select all **Meal Services** and **Lines** for each Meal Service.
3. Select **Site Group** and **Effective Date**.
4. Click Save and Close .



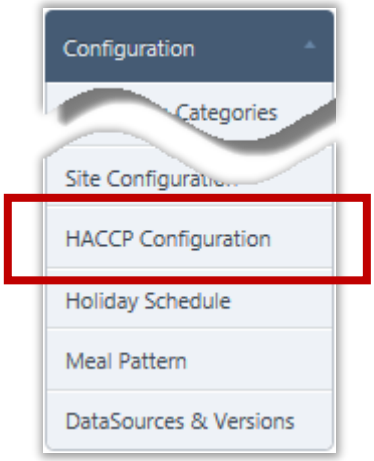
Updating Site Details

To update details for a configured site:

1. Click a **Site Name** link.
2. Make changes in **Meal Services**, **Menu Lines** and **Site Group** as needed.
3. Click Save and Close .



HACCP Configuration

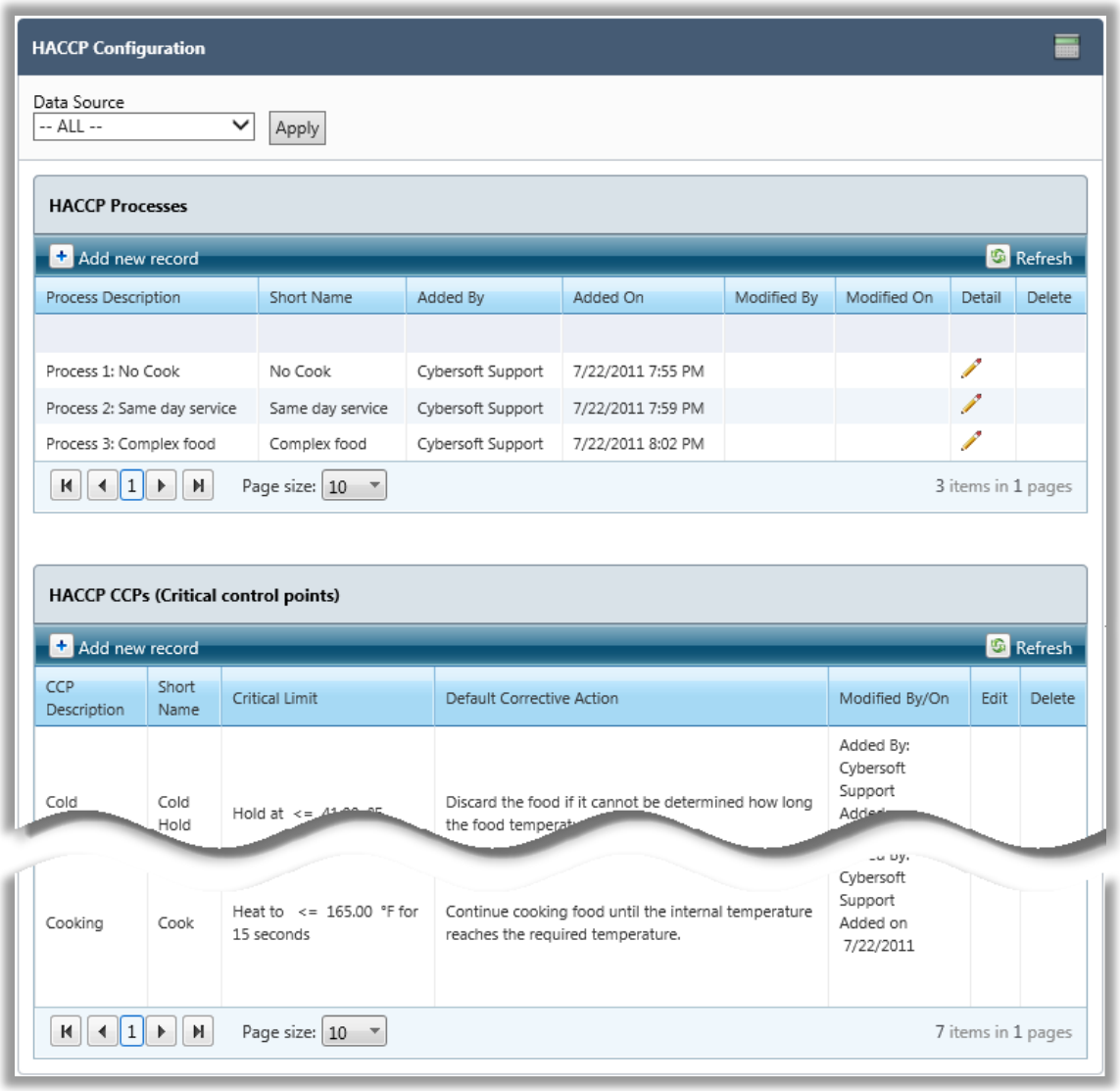


HACCP Configuration lists all HACCP (Hazard Analysis Critical Control Point) processes used by the district. HACCP is a process that has been established for juice, meat, poultry and seafood processing in order to prevent food-borne illness.

A hazard analysis develops a list of hazards which are reasonably likely to cause injury or illness if not effectively controlled.

A critical control point is a step at which control can be applied and is essential to prevent or eliminate a food safety hazard or reduce it to an acceptable level.

HACCP Page

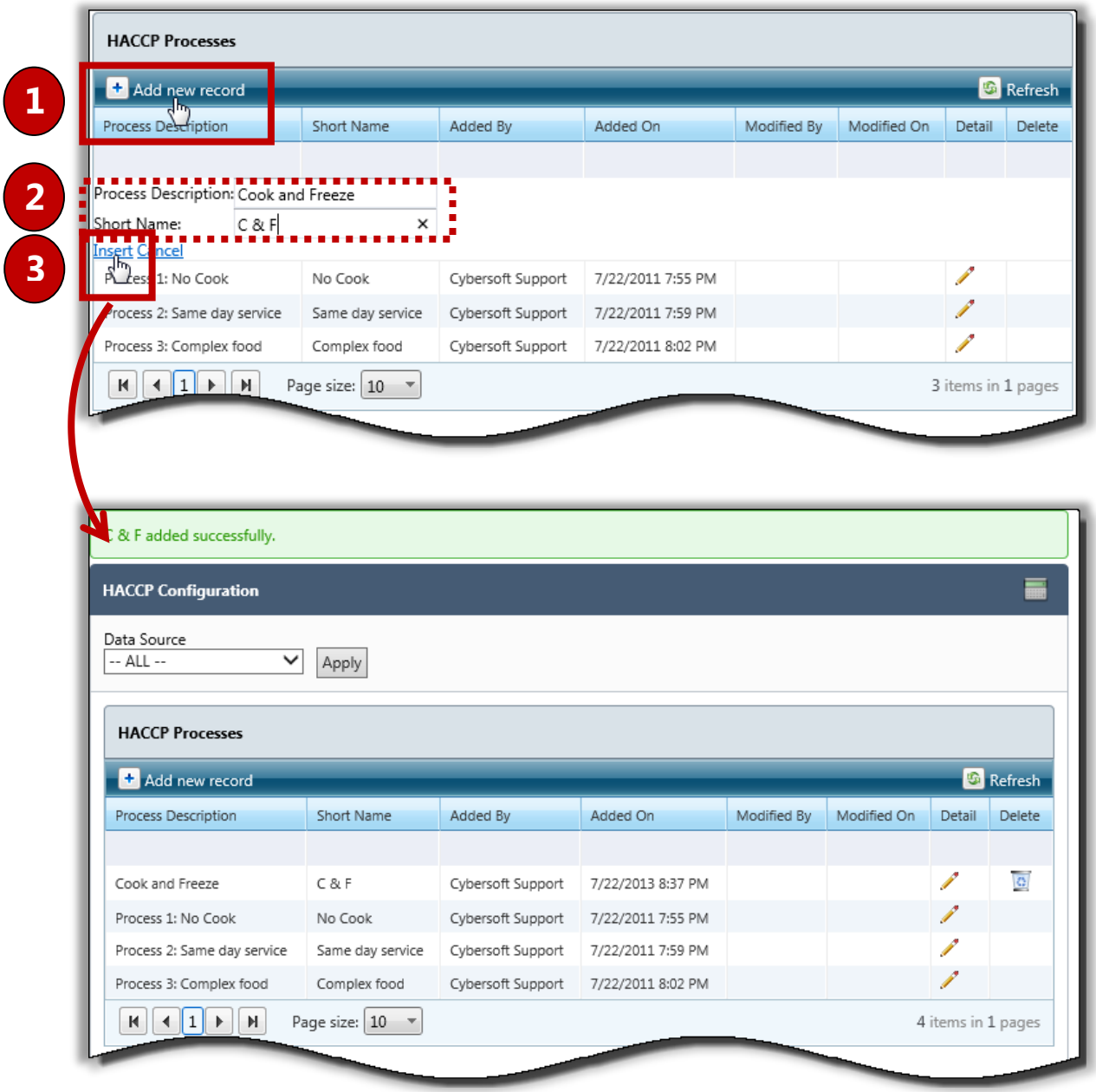


Adding a HACCP Process

To add a HACCP process

1. Click

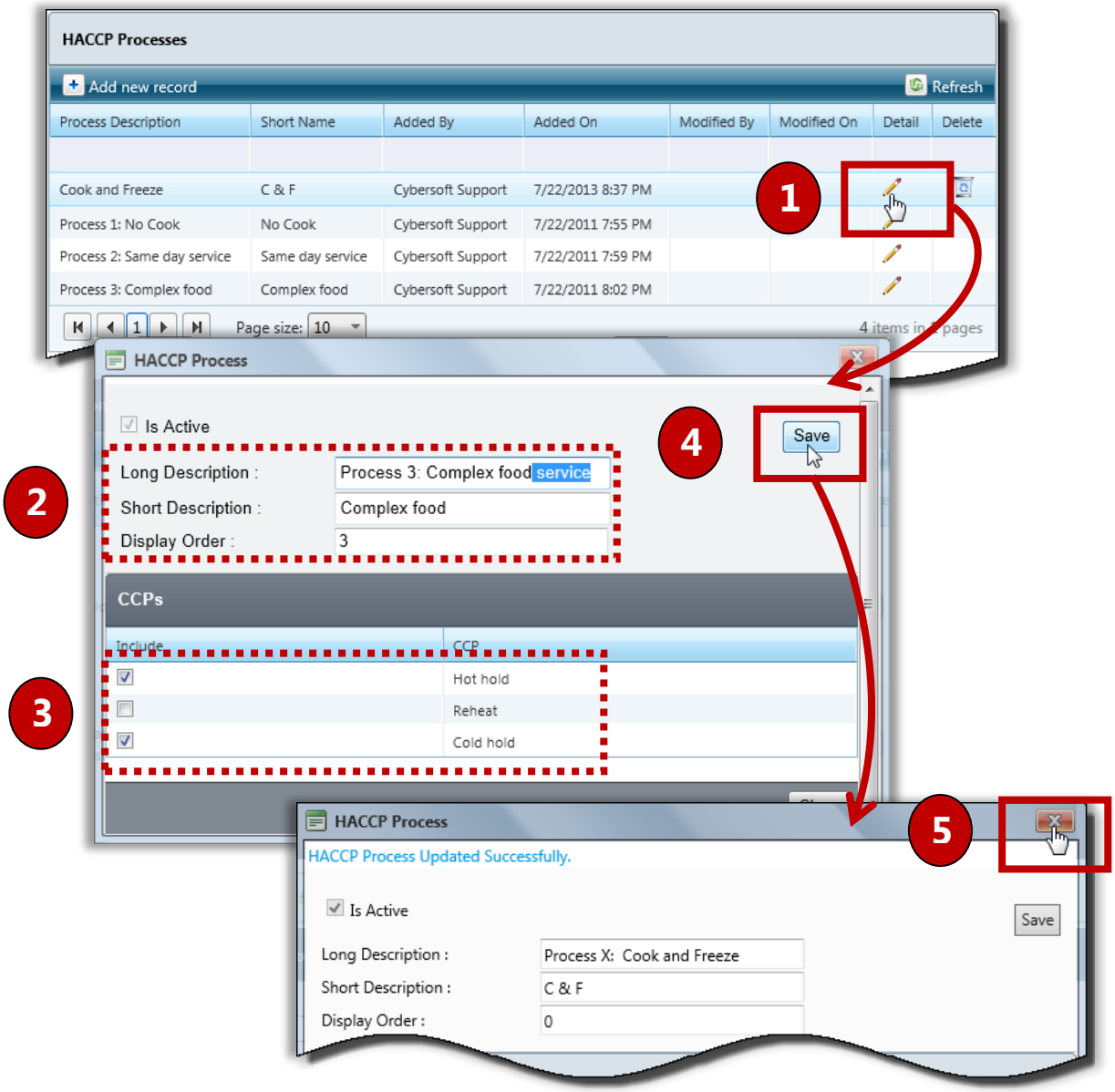
.
2. Enter a name for the process in **Process Description** and a brief name in **Short Name**.
3. Click **Insert**.



Updating a HACCP Process

To update a HACCP process

1. Click **Edit** ( ) in a HACCP process listing.
2. Change **Long Description** or **Short Description** text or **Display Order**, as needed.
3. Select or clear **Critical Control Processes** (CCPs).
4. Click Save .
5. Click Close .

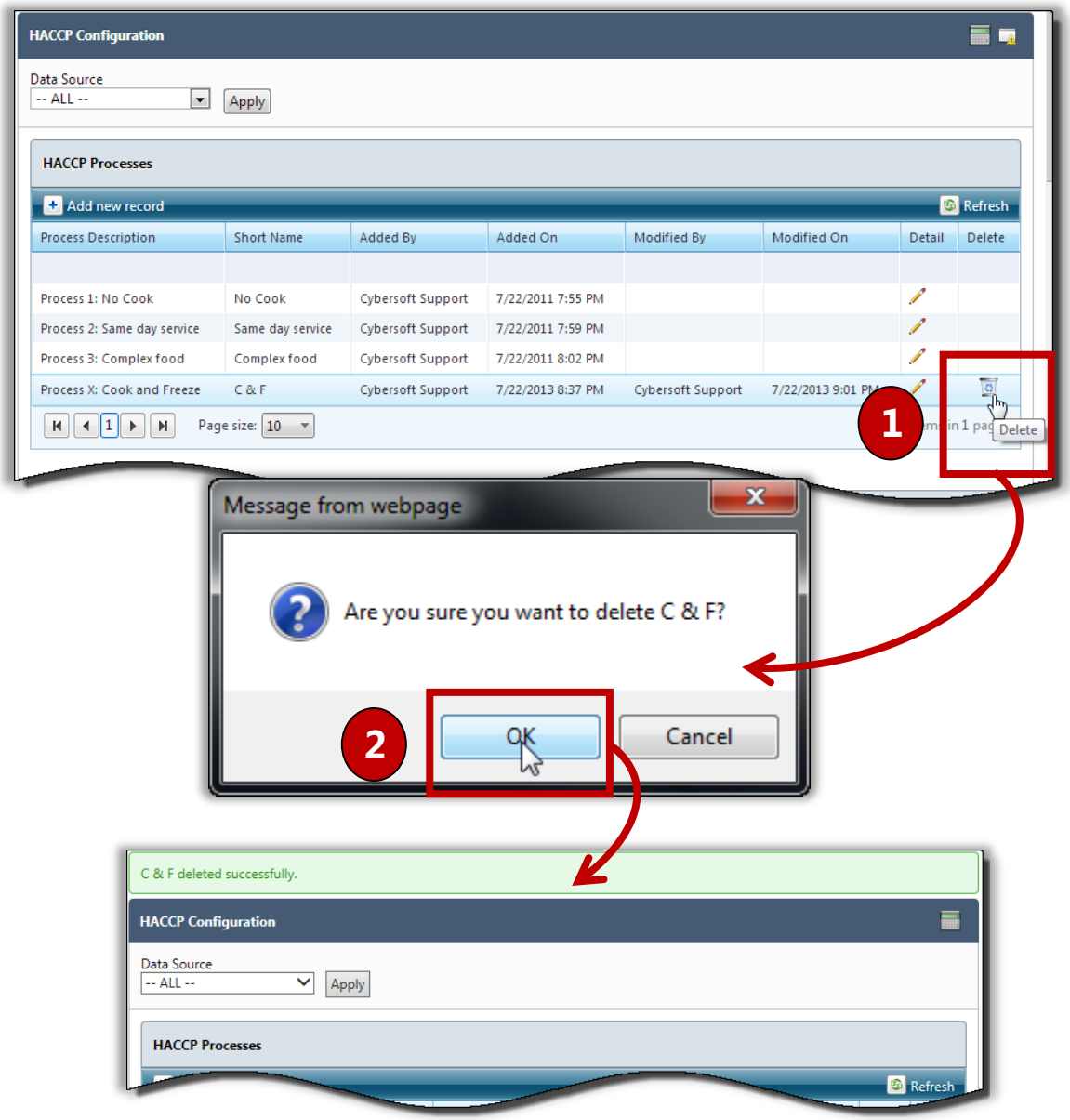


Deleting a HACCP Process

A HACCP process can be deleted only if it is not assigned to a Recipe. When a HACCP process is assigned to a Recipe, the **Delete** ( ) icon does not appear in the process listing in the **HACCP Processes** list.

To delete a HACCP process

1. Click **Delete** ( ) in a process listing.
2. Click OK to confirm the removal.

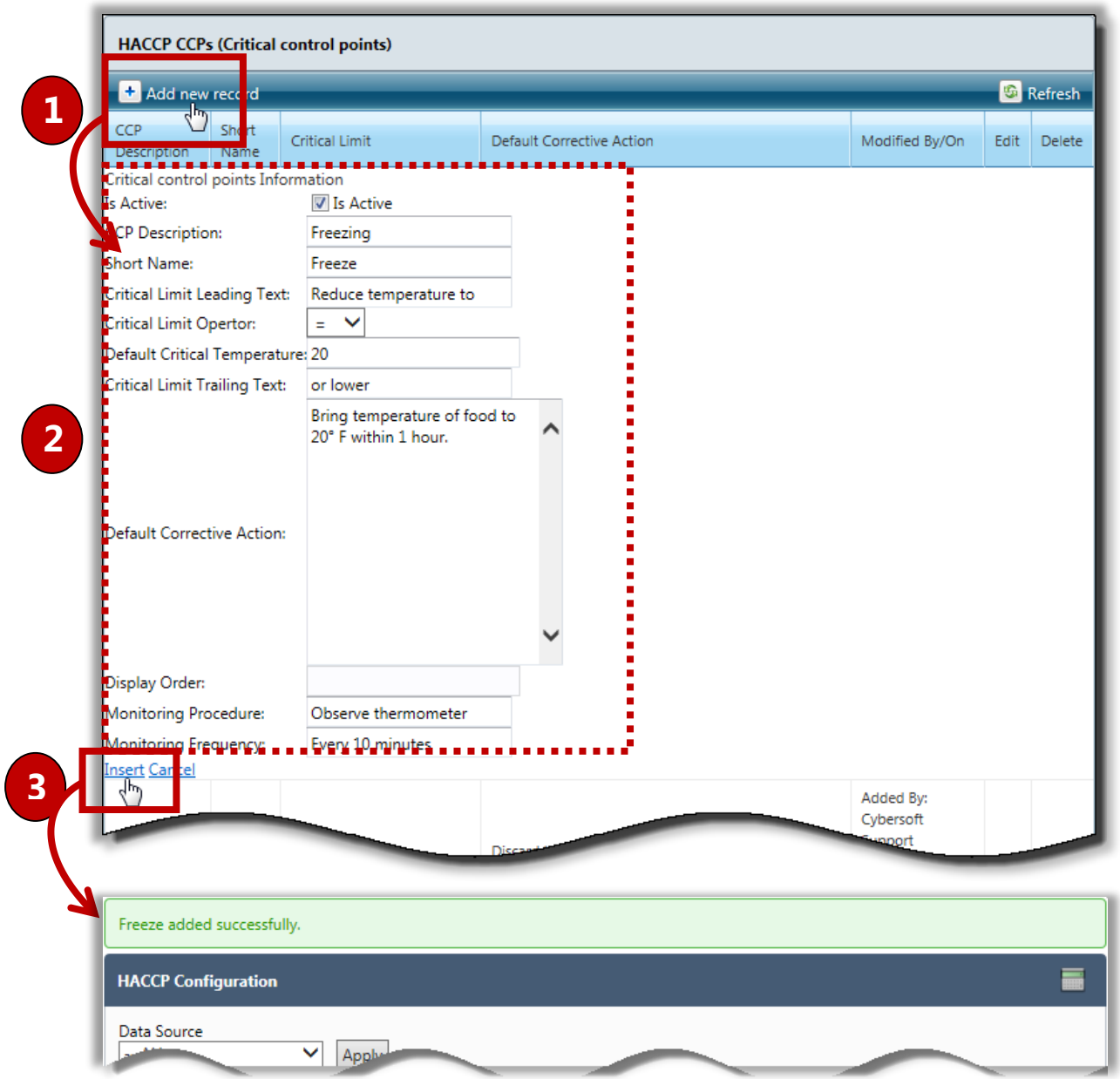


Adding a Critical Control Point

To add a Critical Control Point (CCP)

1. Click

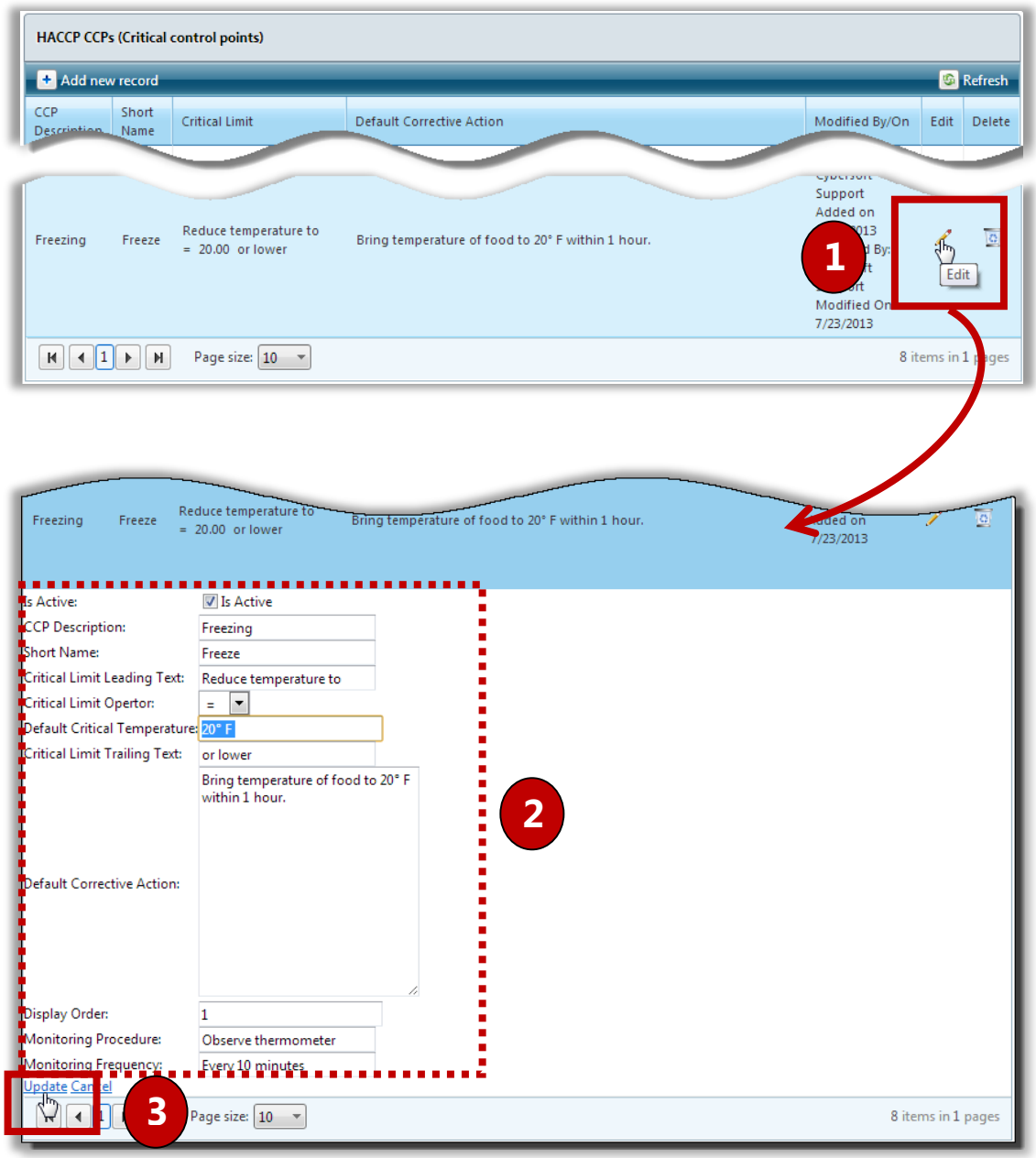
.
2. Enter or select Critical Control Point information.
3. Click **Insert**.



Updating a Critical Control Point

To update a Critical Control Point (CCP)

1. Click **Edit** ( ) in a Critical Control Point listing.
2. Make changes to CCP information, as needed.
3. Click **Update**.

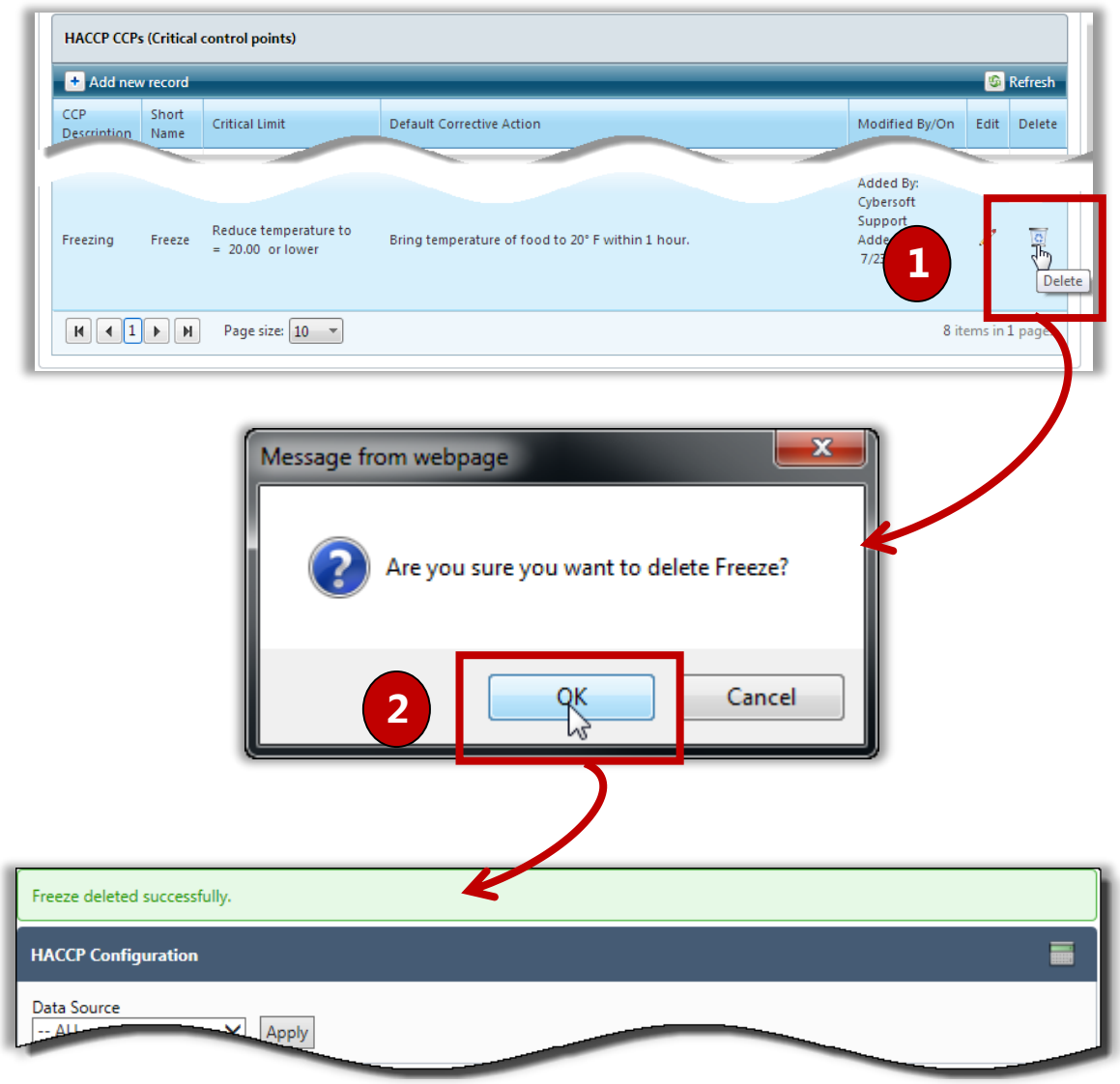


Deleting a Critical Control Point

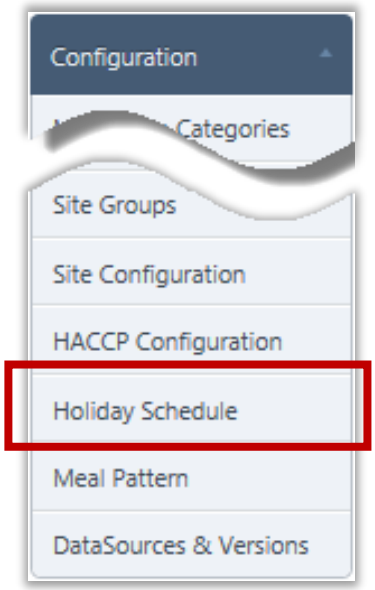
A Critical Control Point can be deleted only if it is not assigned to a Recipe. When a CCP is assigned to a Recipe, the **Delete** ( ) icon does not appear in the CCP listing in the **HACCP CCPs (Critical control points)** list.

To delete a Critical Control Point

1. Click **Delete** ( ) in a CCP listing in the **HACCP CCPs** group.
2. Click OK .



Holiday Schedule

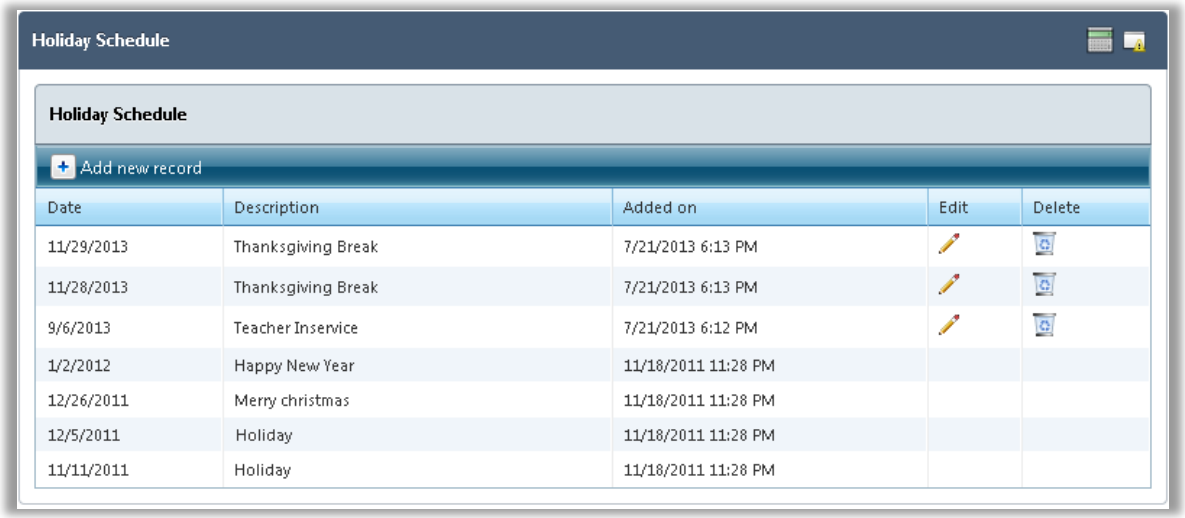


Holiday Schedule adds and manages the description of days designated as holidays, In-service, breaks, or other days on which no meal service is provided and to which Menus are not usually assigned.

Holiday dates and descriptions can be changed as needed. Holidays can be removed from the Holiday Schedule only if the Holiday date has not passed.

Holidays are set up before Menu assignment begins.

Holiday Schedule Page



By default on the **Holiday Schedule** page:

- All existing holidays are listed in the **Holiday Schedule** group.

.

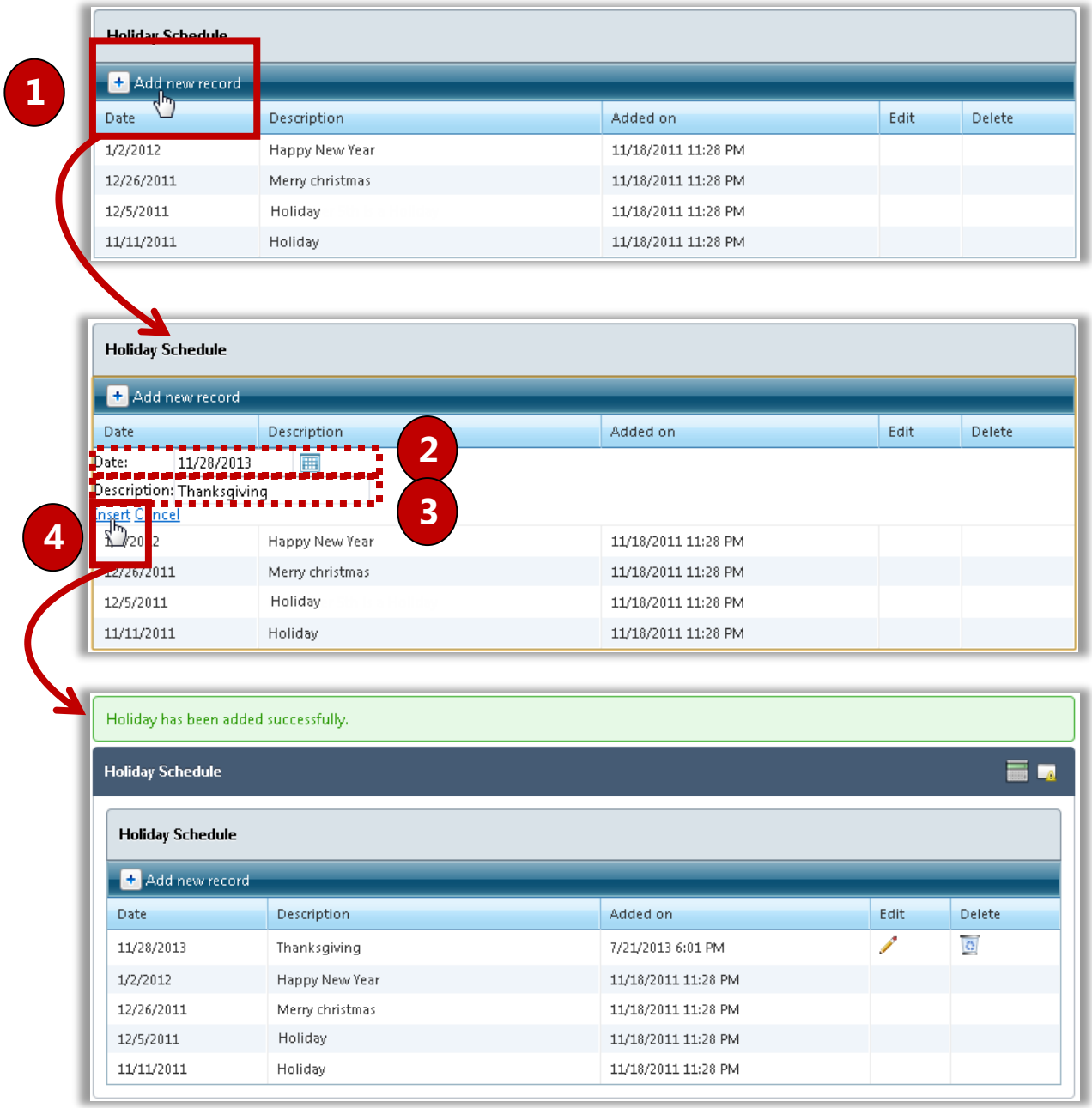
Adding a Holiday

Holidays can be added for the current day or for any future day.

To add a holiday

1. Click

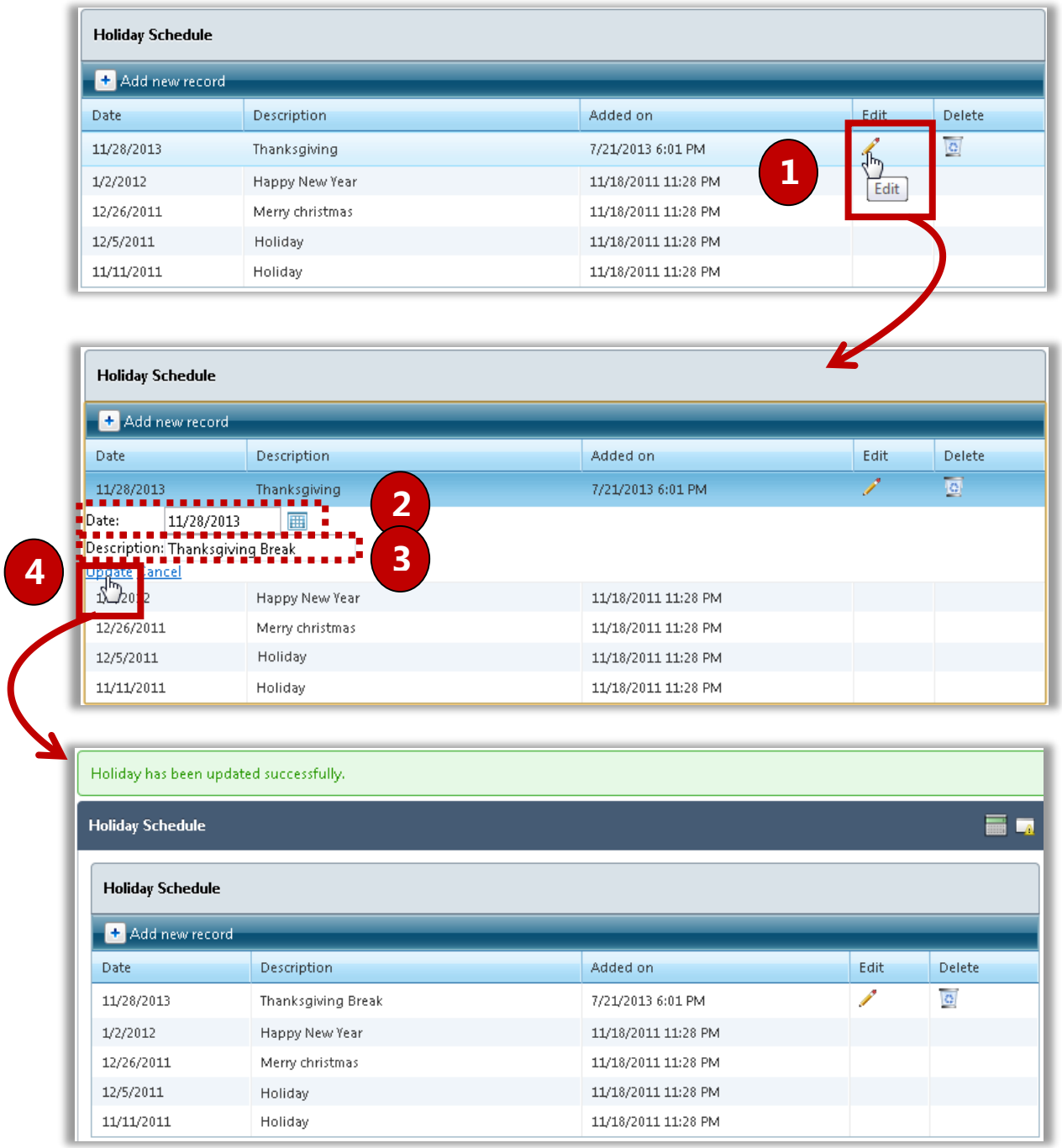
in the **Holiday Schedule** group.
2. Enter or select the holiday date.
3. Enter the holiday name in **Description**.
4. Click **Insert**.



Updating Holiday Details

To change a Holiday description

1. Click in a listing in the **Holiday Schedule** group.
2. Enter or select a date and enter a new **Description**, as needed
3. Click **Update**.

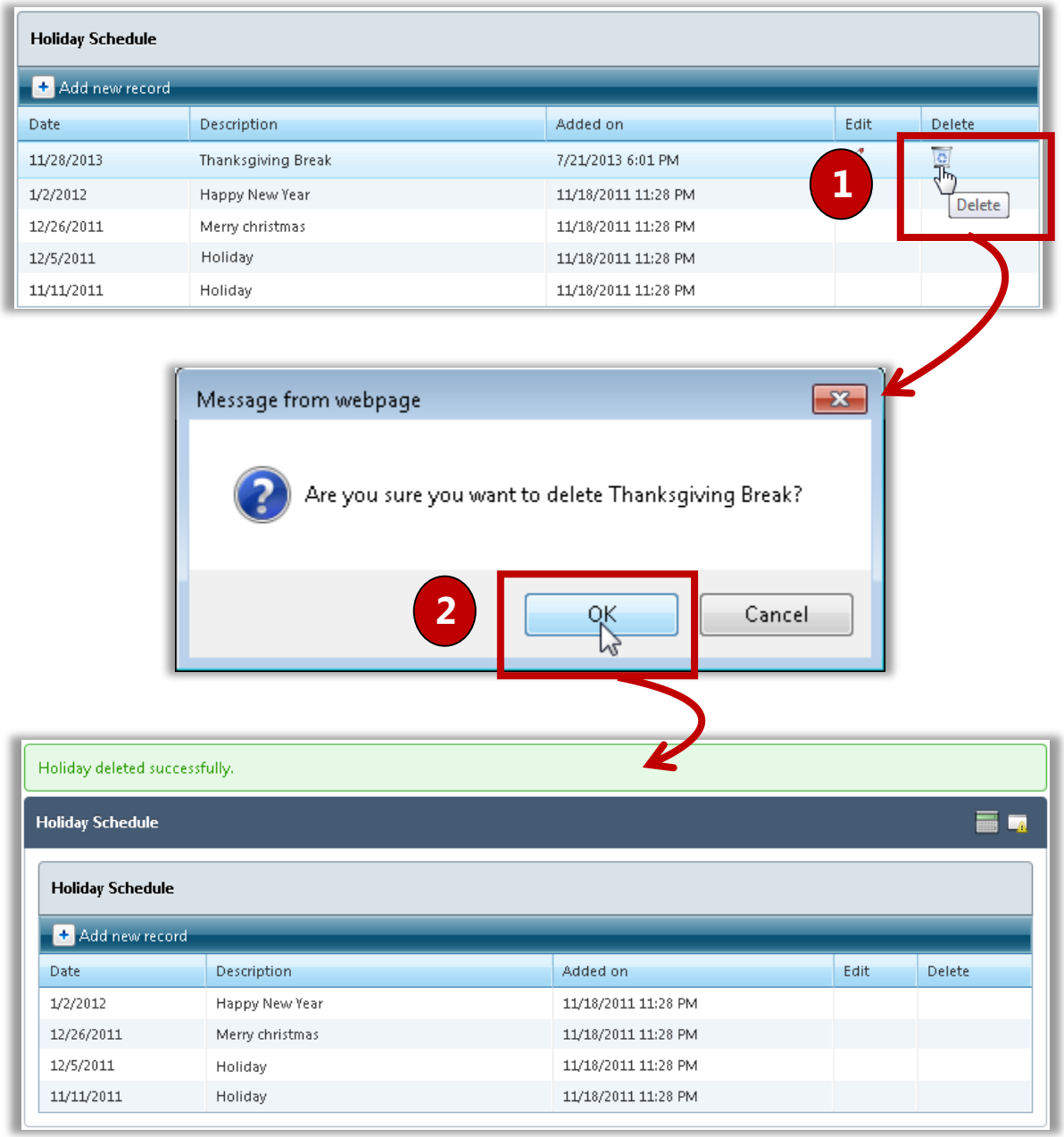


Deleting a Holiday

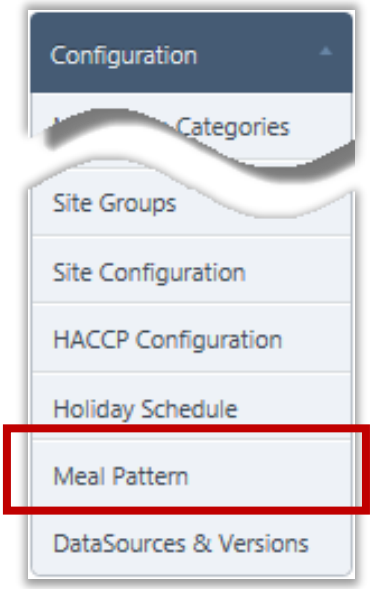
Only future Holidays can be removed. The **Delete** ( ) icon is not available for Holidays on past dates.

To delete a Holiday

1. Click **Delete** ( ) in a Holiday listing in the **Holiday Schedule** group.
2. Click OK .



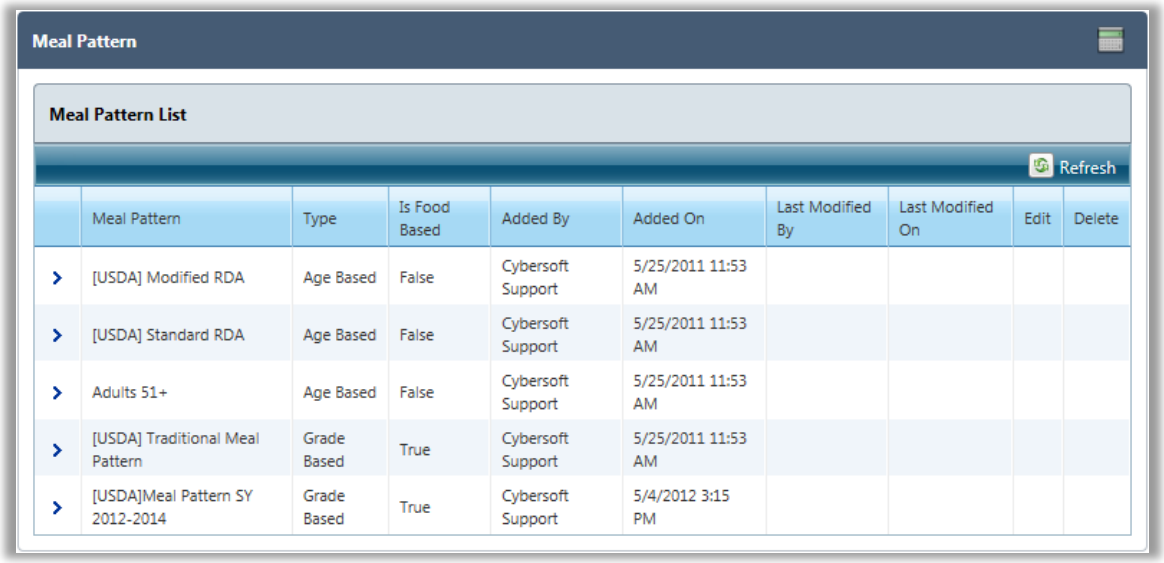
Meal Pattern



Meal Pattern allows you to create and manage standard and local meal patterns for serving groups of patrons.

Standard meal pattern requirements are viewed by serving group and meal service. Local meal patterns are created and changed as needed by establishing local serving groups and meal services.

Meal Pattern Page



	Meal Pattern	Type	Is Food Based	Added By	Added On	Last Modified By	Last Modified On	Edit	Delete
>	[USDA] Modified RDA	Age Based	False	Cybersoft Support	5/25/2011 11:53 AM				
>	[USDA] Standard RDA	Age Based	False	Cybersoft Support	5/25/2011 11:53 AM				
>	Adults 51+	Age Based	False	Cybersoft Support	5/25/2011 11:53 AM				
>	[USDA] Traditional Meal Pattern	Grade Based	True	Cybersoft Support	5/25/2011 11:53 AM				
>	[USDA]Meal Pattern SY 2012-2014	Grade Based	True	Cybersoft Support	5/4/2012 3:15 PM				

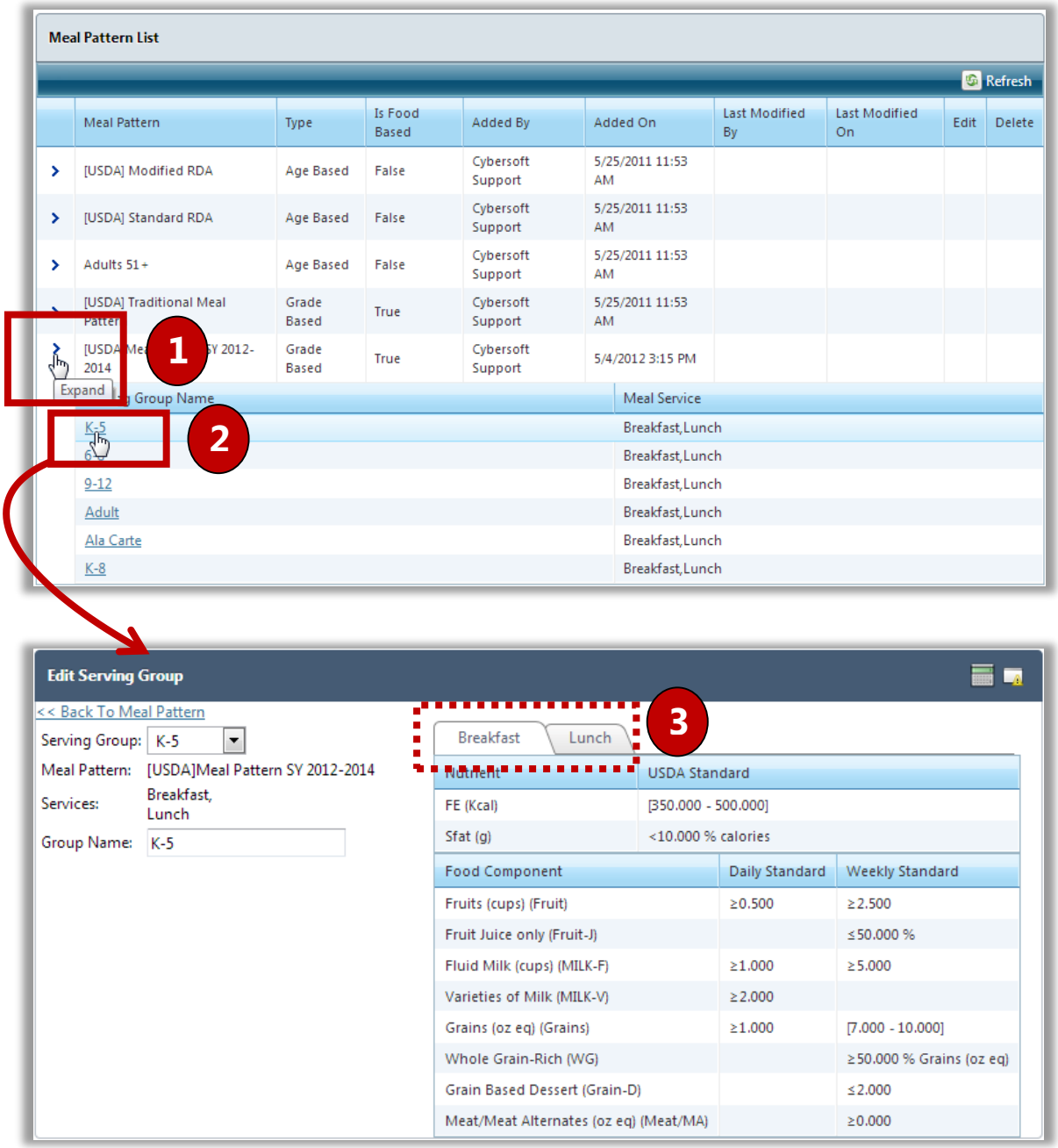
By default on the **Meal Pattern** page:

- Five standard meal patterns are listed in the **Meal Pattern List**.
- Local meal patterns are listed after standard meal patterns.

Displaying Meal Pattern Details

To view Meal Pattern details

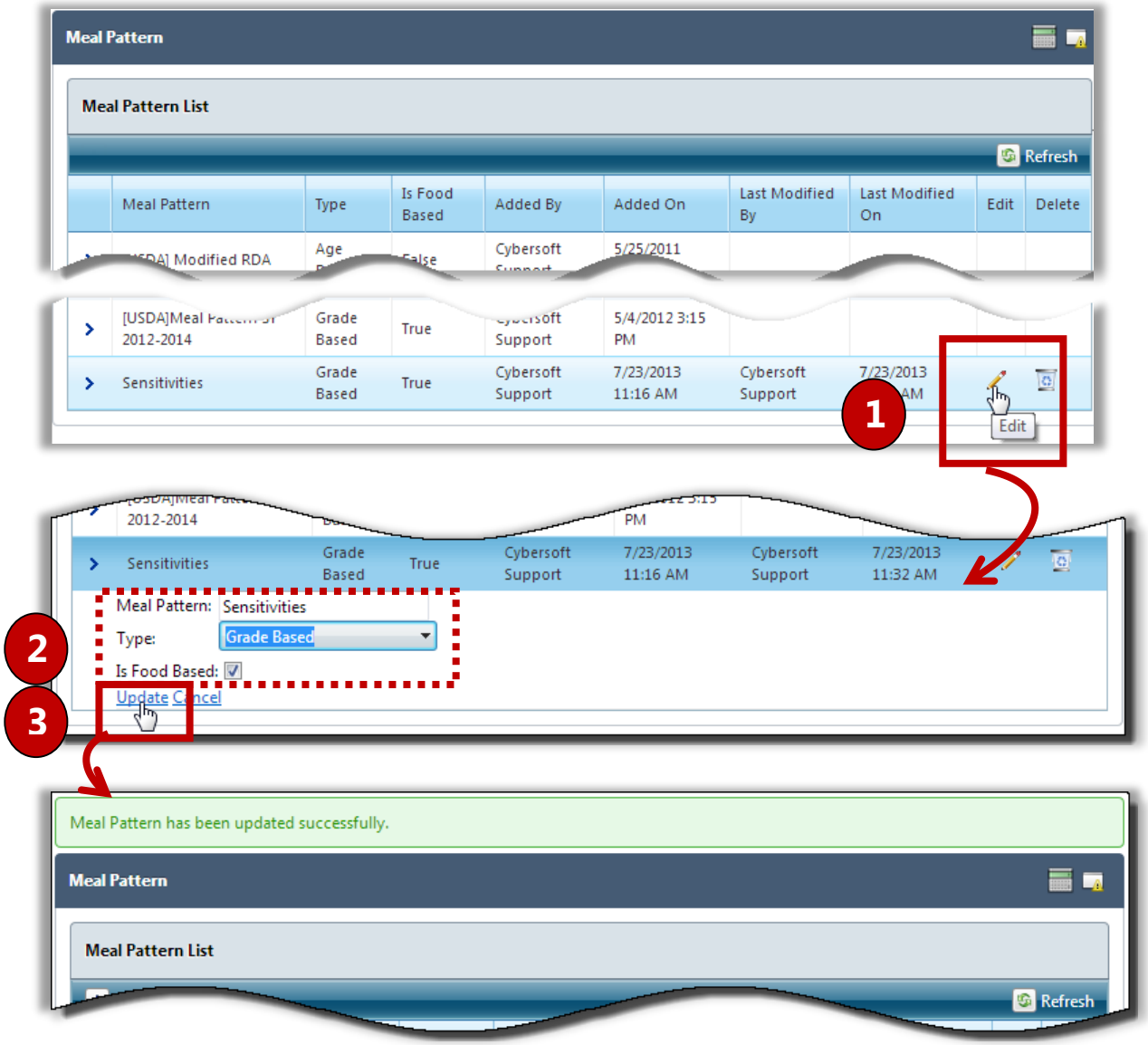
1. Expand a Meal Pattern listing in the **Meal Pattern List**.
2. Click a **Serving Group Name** link.
3. Click the Meal Service tab to view nutrient and food component requirements.



Updating Meal Pattern Basis

To change Meal Pattern basis

1. Click **Edit** ( ) in a Meal Pattern listing.
2. Change the **Meal Pattern** name, **Type**, or food basis, as needed.
3. Click **Update**.

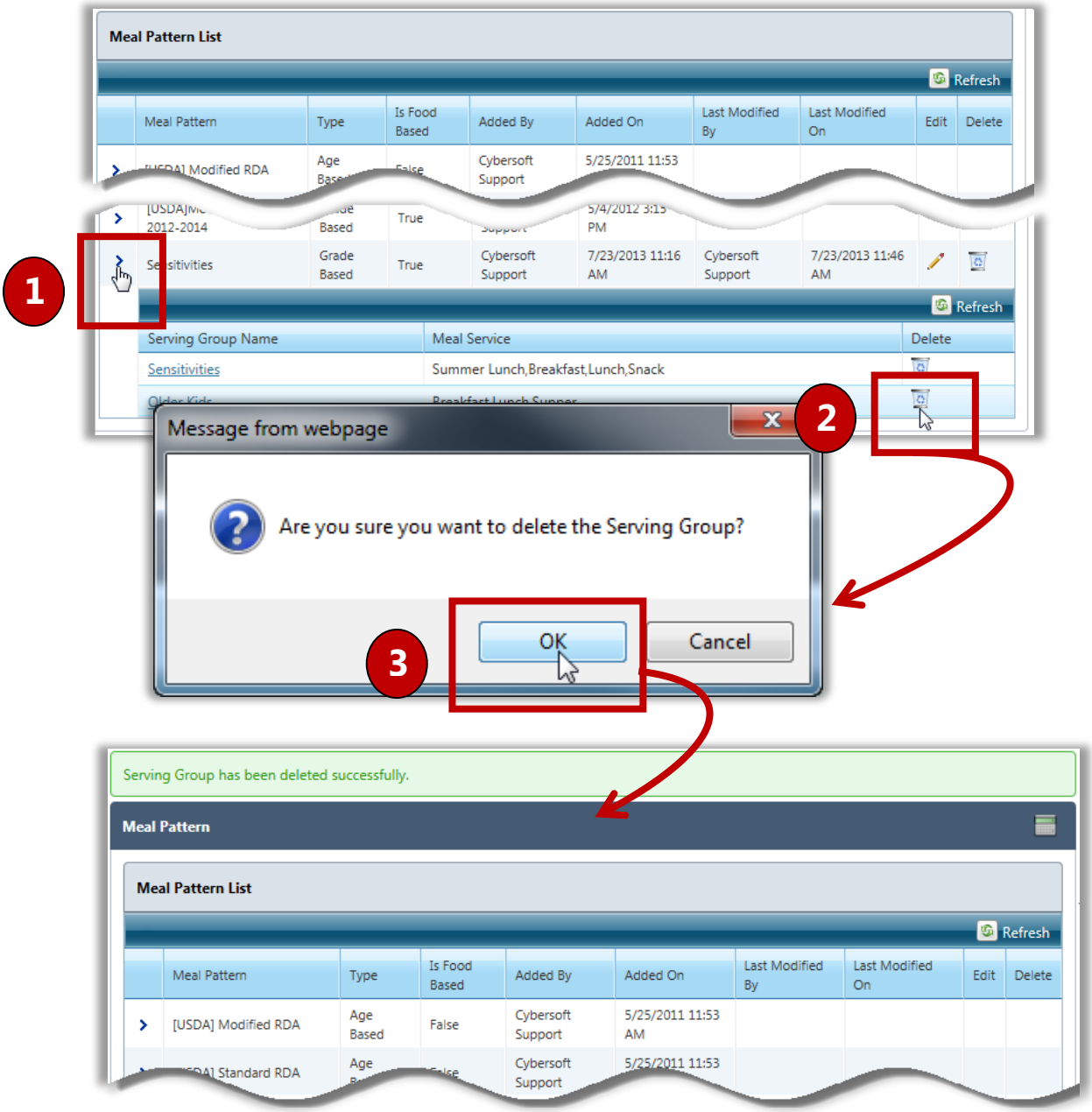


Deleting a Serving Group from a Meal Pattern

Serving Groups can be removed only from a custom Meal Pattern.

To delete a Serving Group

1. Expand a Meal Pattern listing.
2. Click **Delete** ( ) in a Serving Group listing in the Meal Pattern.
3. Click OK to confirm the removal.

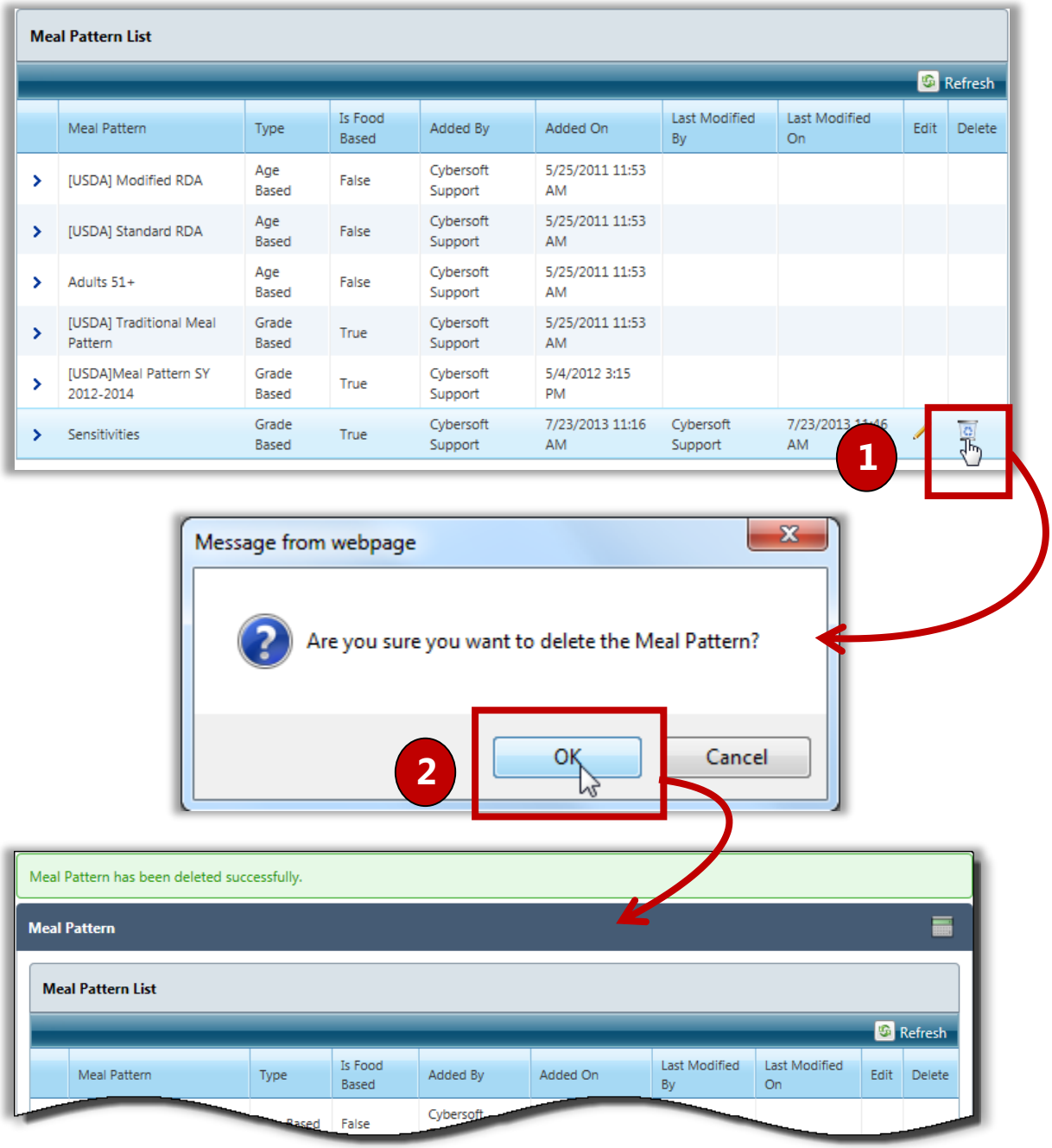


Deleting a Meal Pattern

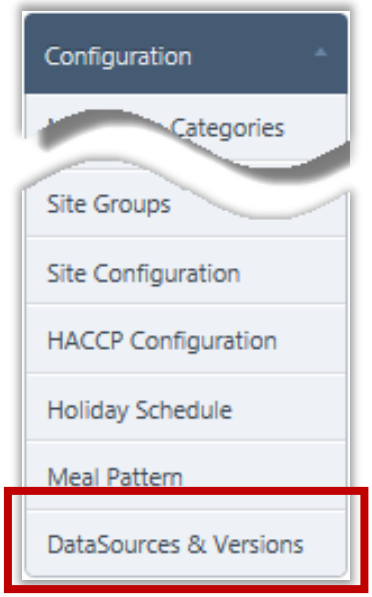
Only custom Meal Patterns can be removed.

To delete a Meal Pattern

1. Click **Delete** ( ) in a Meal Pattern listing.
2. Click OK to confirm the removal.



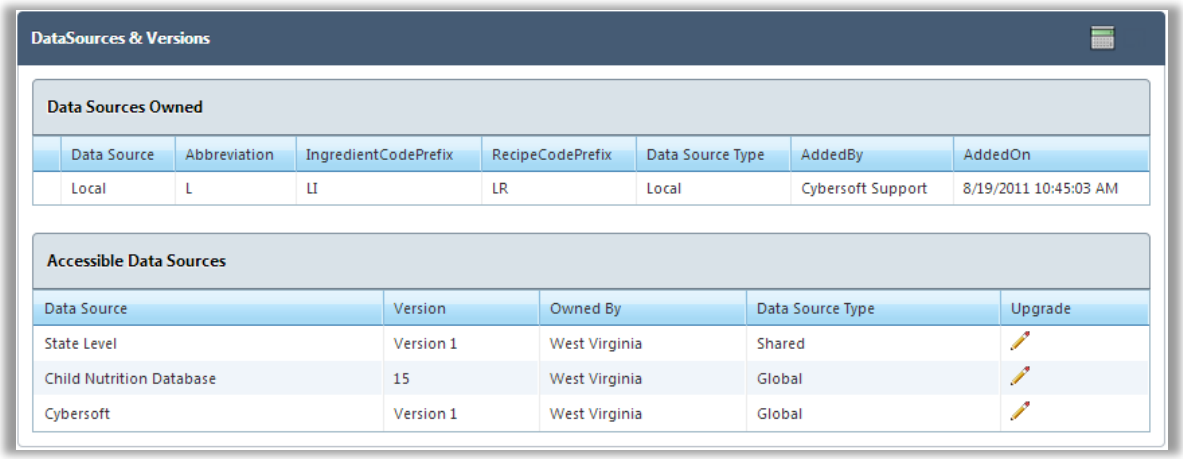
Data Sources & Versions



Data Sources & Versions displays all sources for Ingredients and Recipes that are:

- Owned can be updated.
- Accessible can be copied into the Local data source.

Data Sources & Versions Page



DataSources & Versions

Data Sources Owned

Data Source	Abbreviation	IngredientCodePrefix	RecipeCodePrefix	Data Source Type	AddedBy	AddedOn
Local	L	LI	LR	Local	Cybersoft Support	8/19/2011 10:45:03 AM

Accessible Data Sources

Data Source	Version	Owned By	Data Source Type	Upgrade
State Level	Version 1	West Virginia	Shared	
Child Nutrition Database	15	West Virginia	Global	
Cybersoft	Version 1	West Virginia	Global	

By default on the **Data Sources & Versions** page:

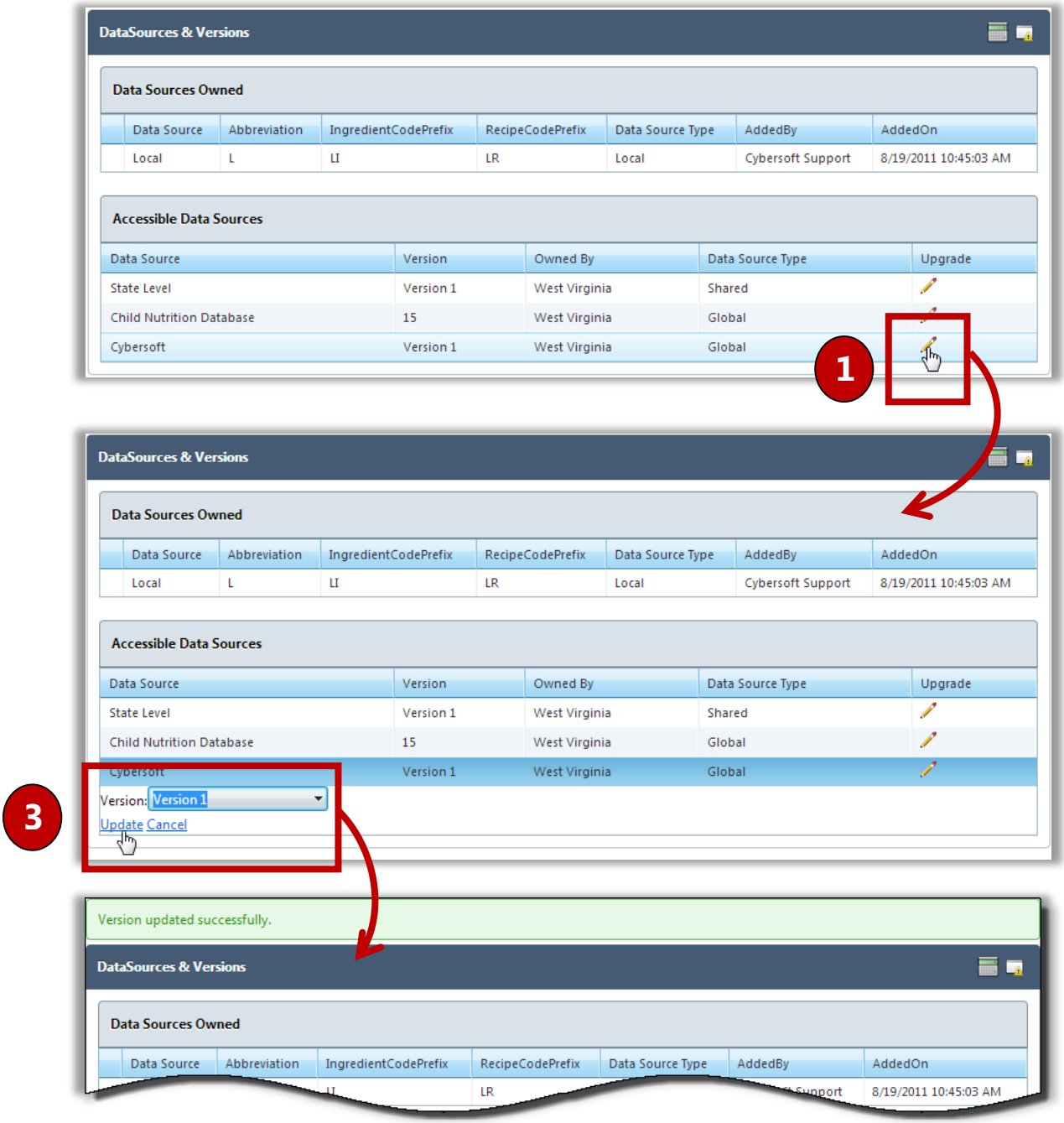
- All available data sources are listed.

Upgrading a Data Source

All accessible data sources can be upgraded to the most current version.

To upgrade a Data Source

1. Click **Edit** ( ) in a Data Source listing.
2. Select a **Version**.
3. Click **Update**.



End of Section

A Working with PrimeroEdge

In this section you will learn:

- ✓ How to log into and out of PrimeroEdge.
- ✓ How to use the Dashboard groups.
- ✓ How to navigate to the Menu Planning module.
- ✓ How to use PrimeroEdge control features.
- ✓ Commonly used acronyms

Open PrimeroEdge

To open PrimeroEdge

1. Find the PrimeroEdge shortcut icon on your desktop
2. Double-click the icon.

The web login page appears.

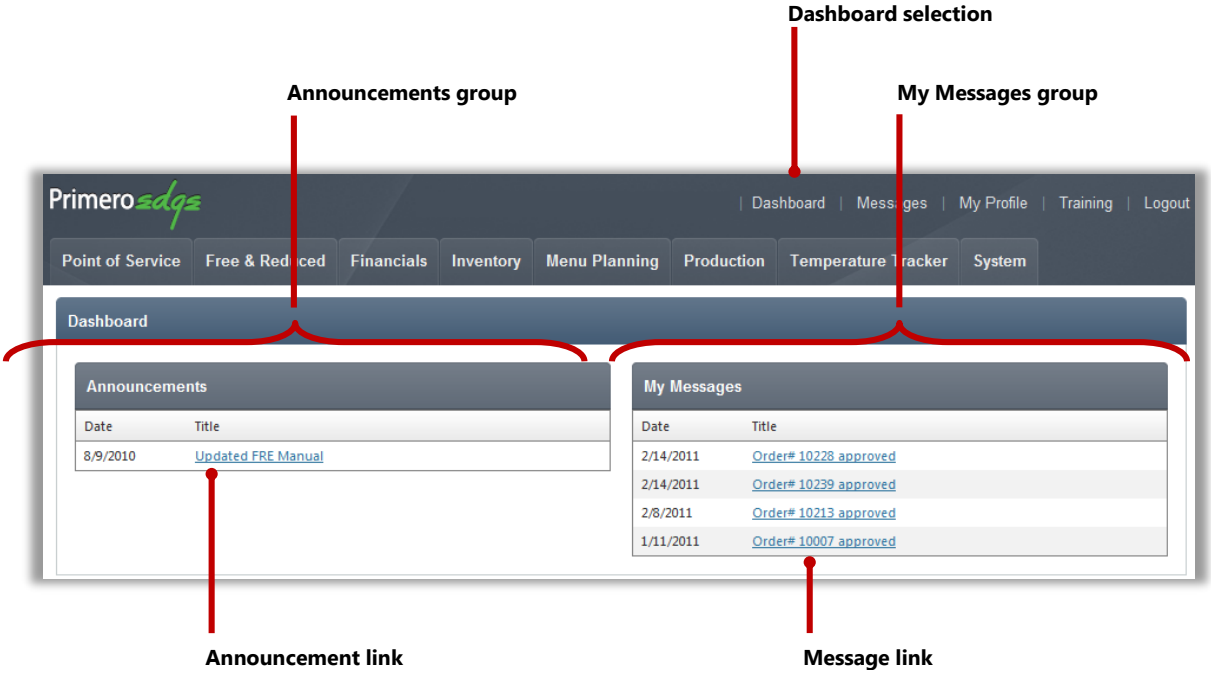
Log In To PrimeroEdge

To log in to PrimeroEdge

1. In **Username**, enter your Username.
2. In **Password**, enter the password associated with your username.
3. Click Login .

Tour the PrimeroEdge Dashboard

The *Dashboard* page appears after a successful login. This page is accessed at any time by clicking **Dashboard** on the top navigation menu.

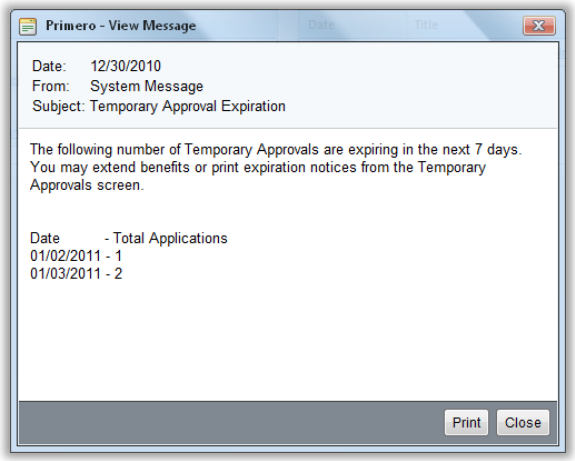


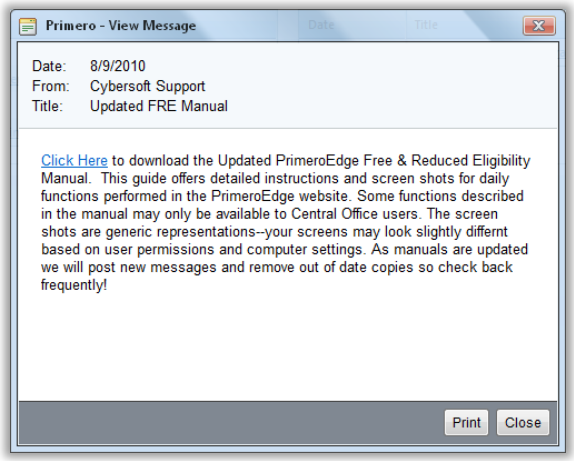
Dashboard Groups

The Dashboard offers two groups:

- **Announcements** – general messages for all users of Primero
- **My Messages** – specific messages to you about items in Primero

Clicking a link in the **Title** column in either group displays the **View Message** popup.





Navigate to Menu Planning

When you login to Primero you see one or more food services modules from Cybersoft Technologies that your district has chosen to use and that your role has permission to access. You will see one tab for each module.

To access the Menu Planning module

- Click the **Menu Planning** tab.

The **Menu Planning** home page lists up to four (4) menus in the vertical menu navigation bar on the left.

The **Menu Planning** module offers four (4) menus.

Note
The menus and menu functions to which you have access are those appropriate for your role with PrimeroEdge. Therefore, when you log on to PrimeroEdge, you may see a subset of the menus shown above, or you may not see all of the functions that are reviewed in this manual.

Log Out of PrimeroEdge

Logging out of PrimeroEdge can be performed from any page.

To log out of PrimeroEdge

- Click **Logout**.

How to Use This Manual

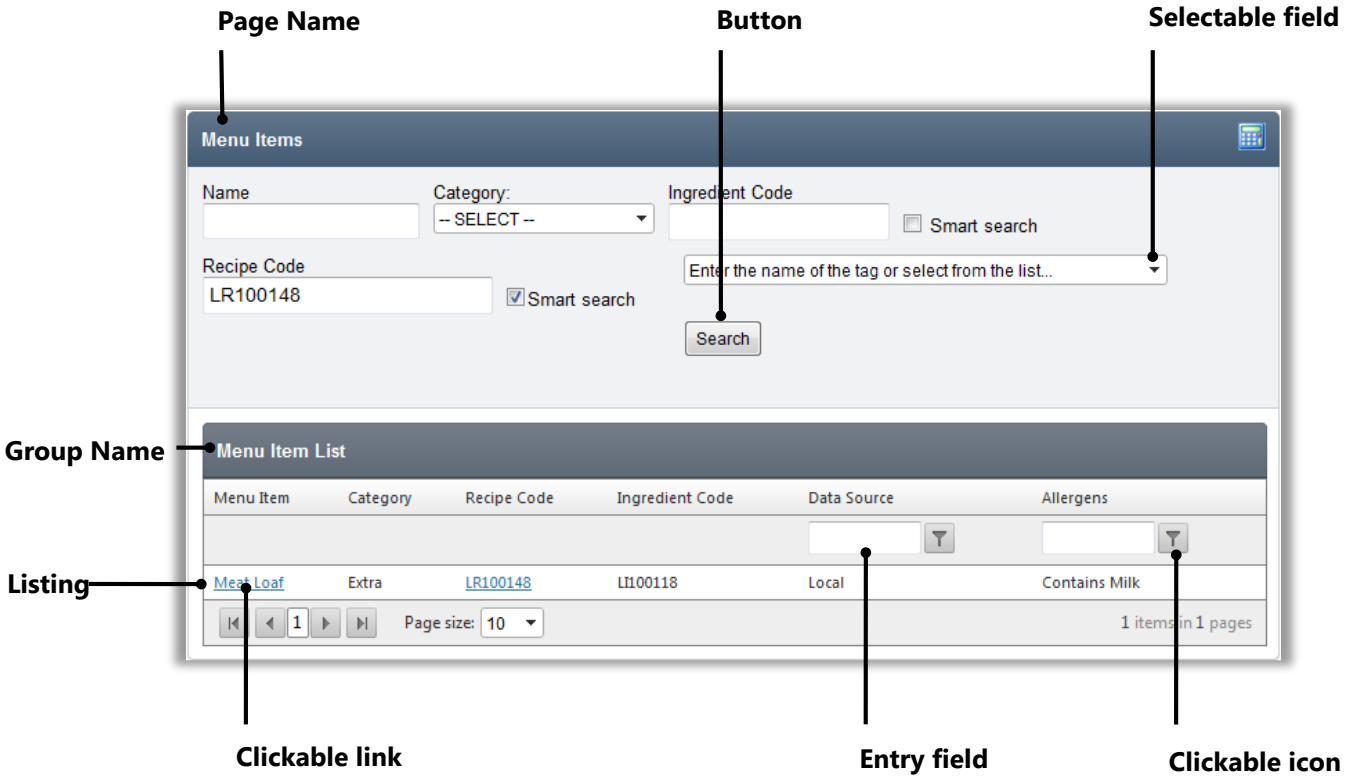
This manual uses style conventions to help you relate what you see in this book to what you see on the PrimeroEdge web site.

Item	Convention	Example
Button	Graphic as seen on page	Click Get Items .
Clickable icon	Icon name in bold followed by graphic	Click **Calendar** ( ).
Clickable link	Blue, bold, italics, underlined	Click the ***OrderNumber*** in the **Order #** column.
Field name	Bold, underlined, capitalization as seen on page	In **Vendor**, select a vendor. In **Comments**, enter comment text.
Group name	Bold, capitalization as seen on page	In the **Delivery Information** group… In the **Vendor Information** group…
Key name	Small caps	TAB key ENTER key
Menu name	Bold, title caps	The **Ordering** menu is…
Menu selection	Bold, capitalization as seen on page	Select **Modify Orders** on the…
Message	Italics, enclosed in quotes, capitalization as seen on page	"*This is a new unsaved order*."
Module Name	Bold, title caps, enclosed with square brackets	**[Menu Planning]**
Page name	*Italics*, title caps	On the *Create Orders* page…
Selection sequence	Bold, capitalization as seen on page, separated with ">"	**[Menu Planning] > Ordering >Create Order**
Window name	Italics, title caps	In the *Report Viewer* window, click…

Menu and Page Conventions

Menus

Pages



Icon Conventions

Several icons are used in this manual to alert you to particular information that is critical or helpful to your use of PrimeroEdge **[Menu Planning]**.

Icon	Name	What it means
	Note	Additional information on the use or function of the command or topic.
	Careful!	Information that is critical to the use of the function.
✓	**Tip**	Information that may help you use the function more effectively.

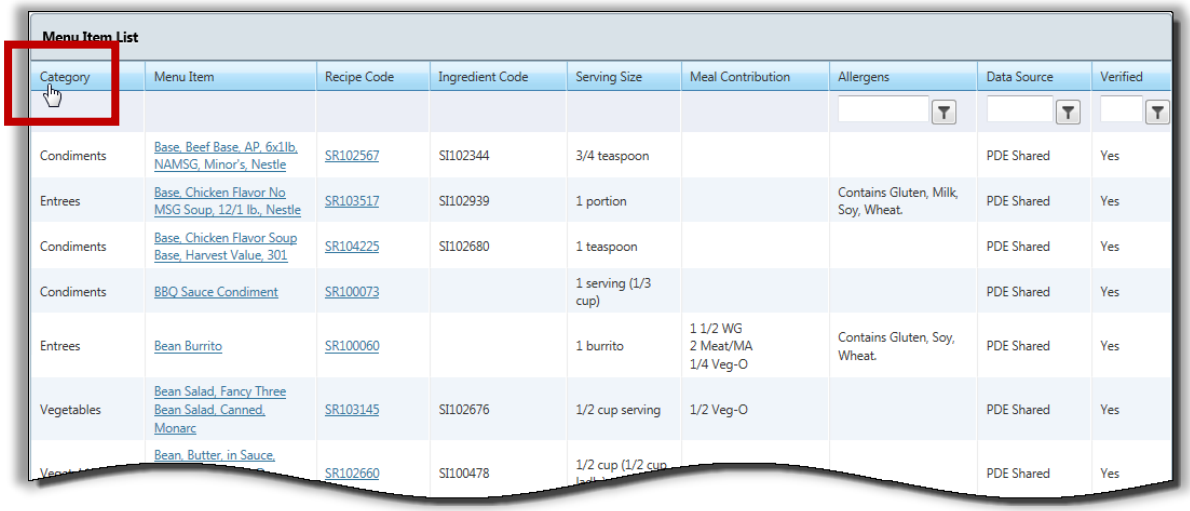
Special Functions

When you see…	You can…
8/30/2010	Place the cursor in a date section, such as Month, and click the ↑ key to increase the number or click the ↓ key to decrease the number.

Working with Column Data

Column data can be sorted when the pointing finger icon appears when the mouse cursor hovers over a column header.

- Click once on the header to sort the column data in ascending order.
- Click the header again to sort the column data in descending order.

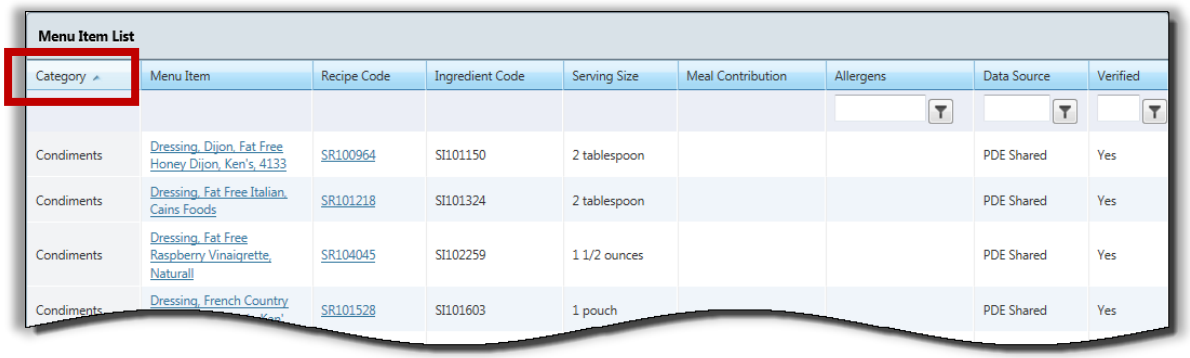


Menu Item List

Category	Menu Item	Recipe Code	Ingredient Code	Serving Size	Meal Contribution	Allergens	Data Source	Verified
Condiments	Base, Beef Base, AP, 6x1lb, NAMSG, Minor's, Nestle	SR102567	SI102344	3/4 teaspoon			PDE Shared	Yes
Entrees	Base, Chicken Flavor No MSG Soup, 12/1 lb., Nestle	SR103517	SI102939	1 portion		Contains Gluten, Milk, Soy, Wheat.	PDE Shared	Yes
Condiments	Base, Chicken Flavor Soup Base, Harvest Value, 301	SR104225	SI102680	1 teaspoon			PDE Shared	Yes
Condiments	BBQ Sauce Condiment	SR100073		1 serving (1/3 cup)			PDE Shared	Yes
Entrees	Bean Burrito	SR100060		1 burrito	1 1/2 WG 2 Meat/MA 1/4 Veg-O	Contains Gluten, Soy, Wheat.	PDE Shared	Yes
Vegetables	Bean Salad, Fancy Three Bean Salad, Canned, Monarc	SR103145	SI102676	1/2 cup serving	1/2 Veg-O		PDE Shared	Yes
	Bean, Butter, in Sauce,	SR102660	SI100478	1/2 cup (1/2 cup			PDE Shared	Yes

A small triangle next to the header indicates the sort order:

- (Ascending)
- (Descending)

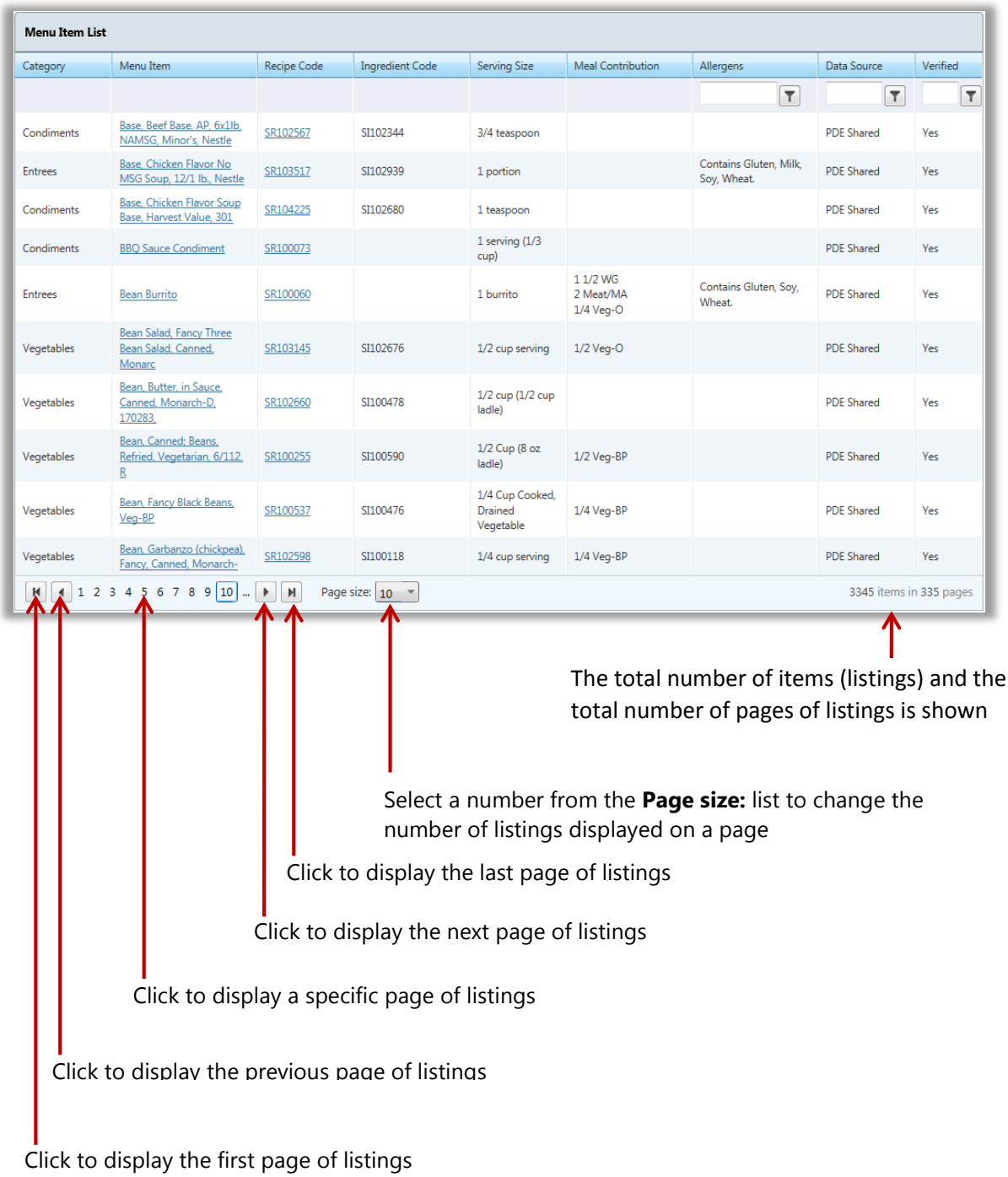


Menu Item List

Category	Menu Item	Recipe Code	Ingredient Code	Serving Size	Meal Contribution	Allergens	Data Source	Verified
Condiments	Dressing, Dijon, Fat Free Honey Dijon, Ken's, 4133	SR100964	SI101150	2 tablespoon			PDE Shared	Yes
Condiments	Dressing, Fat Free Italian, Cains Foods	SR101218	SI101324	2 tablespoon			PDE Shared	Yes
Condiments	Dressing, Fat Free Raspberry Vinaigrette, Naturall	SR104045	SI102259	1 1/2 ounces			PDE Shared	Yes
Condiments	Dressing, French Country	SR101528	SI101603	1 pouch			PDE Shared	Yes

Working with List Display Controls

Several pages display listings on multiple pages. Display controls are provided below the listings to move between the pages.



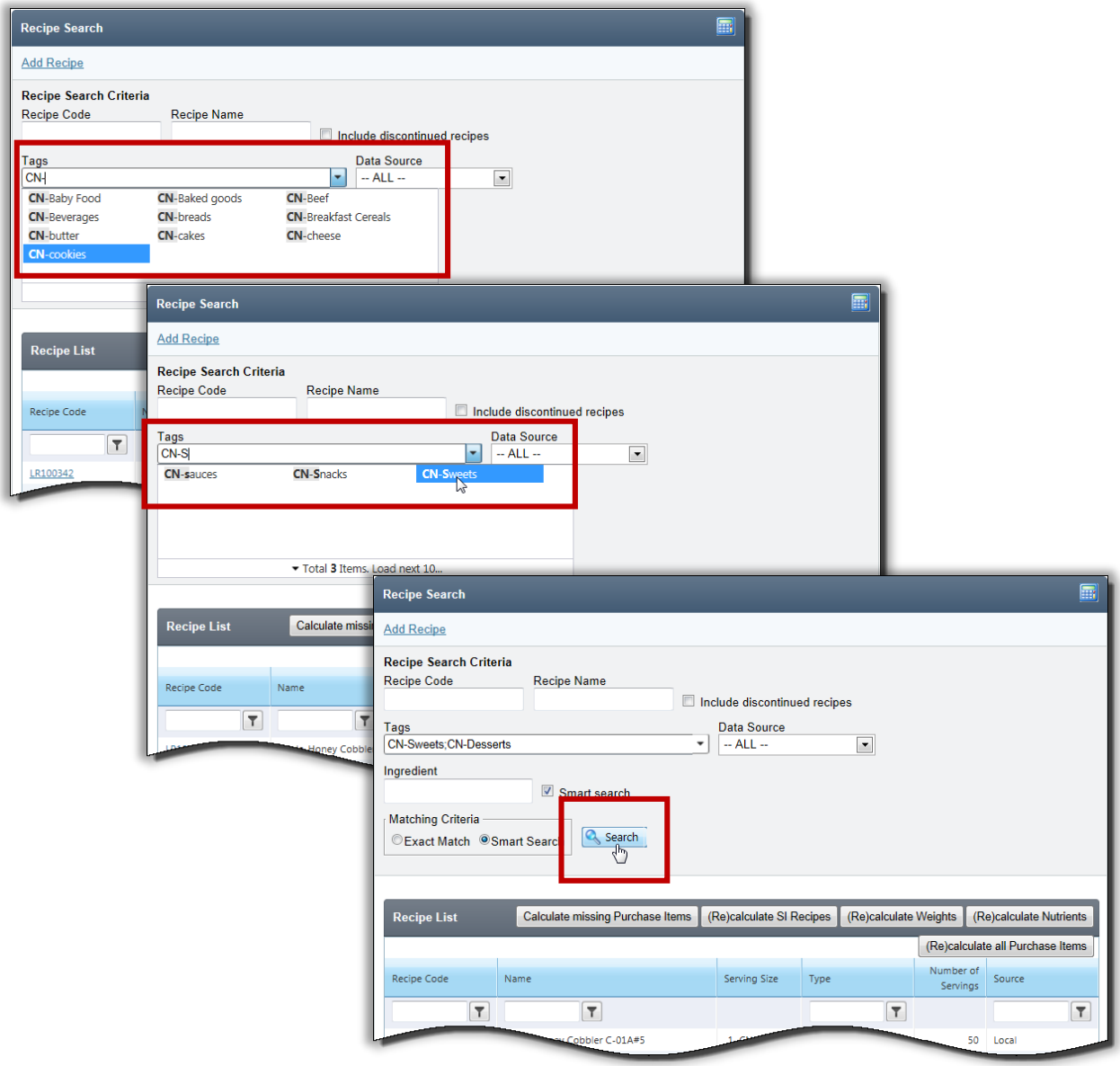
Working with Tags

Tags were developed to help organize data and find information more quickly. Several functions include tags, such as Recipes, Ingredients, Menus, and Menu Items.

To choose tags

1. Place the cursor in **Tags** and begin entering characters; a drop-down list of tags that match the entered characters is shown.
2. Continue to enter characters to narrow or filter the list of tags until you see the desired tag.
3. Click the tag name.

Use as many tags as needed to find the ingredient or recipe; separate tags with a semicolon ";".

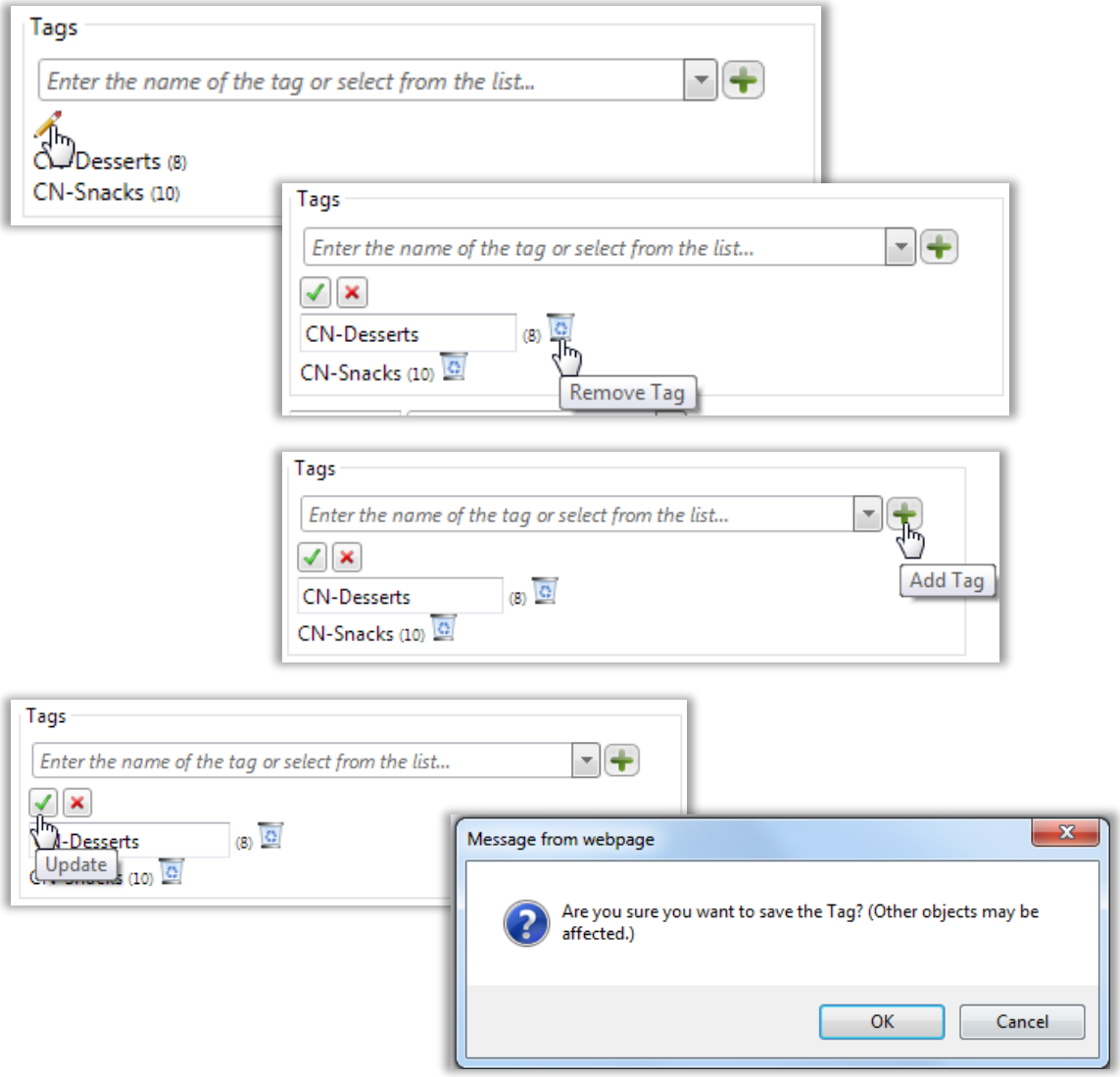


Managing Tags for an Ingredient

Ingredient tags can be managed through the **Tags** group on the **General** tab on the **Ingredients** page or **Recipe** page. Tags can be added or removed.

To manage Tags

1. Click **Edit** ( ).
2. Click **Remove Tag** ( ) next to a tag to remove.
3. Enter or select a tag and click **Add Tag** ( ) to add.
4. Click **Update** ( ).
5. Click OK .



B Terms

- ✓ Terms Used with Ingredients
- ✓ Terms Used with Recipes

Terms Used with Ingredients

Term	Description
Allergen	One of nine (9) substances that most commonly produce a hypersensitive reaction.
Allergen Indicator	One of three situations in which allergens may be present in Ingredients or Recipes: Contains, May contain, Processed in a facility that also processes [allergen]
Commodity/Recipe Code	USDA code.
Data Source	Method or process in which the Recipe is used; can be either: Local – database that includes Ingredients added by the user. Child Nutrition – database that includes USDA Ingredients. Cybersoft – database that includes USDA Recipes that use government commodity ingredients.
Ingredient Name	Full and complete Ingredient descriptive name.
Ingredient Short Name	Brief, shortened form of the full Ingredient name.
Ingredient Code	Unique ingredient identifier; automatically assigned by the system when the ingredient is added to the [Menu Planning] module.
Ingredient Form	The method by which the Ingredient is used: As purchased – the food is used in exactly the same form as it was purchased, meaning that no further preparation has been made to the food, such as unbaked prepared pizza or pre-fried egg roll. As served – the food is used after it has been further prepared, such as a cake mix that has eggs, oil and water added and then cooked.
Is Active	Indicates if the Ingredient is actively used in Recipes. When selected (check mark added), Ingredient is active. When cleared (check mark removed), Ingredient is not active.
Labels	Nutrition Fact labels provided by the vendor for an item that describes nutrient information.
Manufacturer	Ingredient maker or producer.

Term	Description
Prep Method	Methods used to prepare Ingredients, such as “bake”, “fry”, “broil”, etc.
Product Code	Code given to product by manufacturer.
Purchase Item	Name used when purchasing an item from a vendor.
Serving Size	Amount or count of a single serving.
Stock Item	Name used when purchasing an item from a school district warehouse.
Tags	Identifiers to help find the Recipe through a search function.
Weight	Weight or volume of a single serving.
Yield	The number of servings that can be produced from a set amount, typically one pound.

Terms Used with Recipes

Term	Description
Cook Time	(Cooking Time) Amount of time required to bake, broil, sauté, boil, cook the prepared Recipe Ingredients.
DOR	Display on Record (Ingredients tab of Recipe page) – when selected (check mark added), the image of the Ingredient is displayed on the Production Record in the **[Production]** module.
Fat	The percentage of increase or decrease in fat content after preparation, such as, the percentage of fat decrease that resulted from draining fat after cooking ground beef.
HACCP Process	(Hazard Analysis Critical Control Point Process) Includes all Critical Control Points used in the recipe production. HACCP Processes are created and changed through the Configuration > HACCP Configuration function.
Is Active	Indicates if the Ingredient is actively used in Recipes. When selected (check mark added), Ingredient is *active*. When cleared (check mark removed), Ingredient is *not active*.
Moisture	The percentage of increase or decrease in moisture content after preparation, such as occurs when dry noodles are boiled in the preparation of a casserole (moisture gain) or when apples are peeled and cored (moisture loss).
Number of Servings	Total number of servings produced by one Recipe production.
PI WIG	Purchase Item Weight in Grams
Prep Time	(Preparation Time) Amount of time required to prepare, assemble or combine the Recipe Ingredients up to the time that it is to be cooked or is ready to serve.

Term	Description
Pre-Preparation Instructions	Activities to complete before Recipe preparation begins, such as bringing Ingredients to a specific temperature before use.
Recipe Generation Type	Method or process in which the recipe is used; can be either: ▪ **Nutrition Analysis Recipe** – analyzed with the Yield Factor Method to provide a nutrient analysis that accounts for changes in nutrients caused by preparation and cooking. The Yield Factor Method requires that each raw RecipeIingredient be converted and entered in the Recipe as a "as consumed" or ready-to-serve (often cooked) Ingredient. When building this type of recipe, user selects *ingredients* on the **Ingredients** tab. ▪ **Production Recipe** – includes raw Ingredients and amounts in the uncooked state, directions for producing the Recipe, and the yield and serving size as prepared. These Recipes are generally used by cooks to prepare the Recipe or to calculate how much/many raw ingredients to order. When building this type of Recipe, user selects *purchase items* on the Ingredients tab. ▪ **Dual Entry Recipe** – recipe is used for both Nutritional Analysis and Production. When building this type of recipe, user selects either *ingredients* or *purchase items* on the **Ingredients** tab. ▪ **Single Ingredient Recipe** – recipe is created from a single ingredient, such as using the "As Purchased" "Bagel" Ingredient to create the "Bagel" Recipe which in turn allows for creating a Menu Item to be offered for a meal service. The "default" Recipe type is set through the system setting: Default Recipe Generation Type (**[System] > Management > System Settings > Menu Planning > Category:Ingredients**).
Recipe Name	Full and complete Recipe description.
Recipe Short Name	Brief, shortened form of the full Recipe name.

Term	Description
Serving Size	Physical size or weight of a single serving.
Serving Instructions	Specific directions for serving the prepared Recipe item, such as "Place cake slice in bowl and spoon 1 TBSP sauce over top."
Tags	Identifiers to help find the Recipe through a search function.
Waste Factor	The percentage of waste material that results from the preparation of the Recipe, such as after preparing cookies, the percentage of unused icing that must be discarded.
WIG	Weight in Grams

End of Appendix

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