

MENU PLANNING

Training Manual for Child Nutrition Software Solutions

Cybersoft PrimeroEdge is a leading provider of software solutions to Child Nutrition Departments in K-12 school districts and State Agencies across the nation. This training manual provides a reference and reinforcement of the Menu Planning tasks. The user should have basic computer knowledge.

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PrimeroEdge Food Service Solutions

PrimeroEdge Menu Planning Manual

Release 7.15

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MENU PLANNING

TRAINING MANUAL FOR CHILD NUTRITION SOFTWARE SOLUTIONS

1 INTRODUCTION

Cybersoft PrimeroEdge is a leading provider of software solutions to Child Nutrition Departments in K-12 school districts and State Agencies across the nation. This training manual covers Menu Planning.

PrimeroEdge Software contains Modules, Categories and Functional Areas. The hierarchy allows for easy navigation and division between tasks. The structure provides for comprehensive operations while remaining easy to navigate.

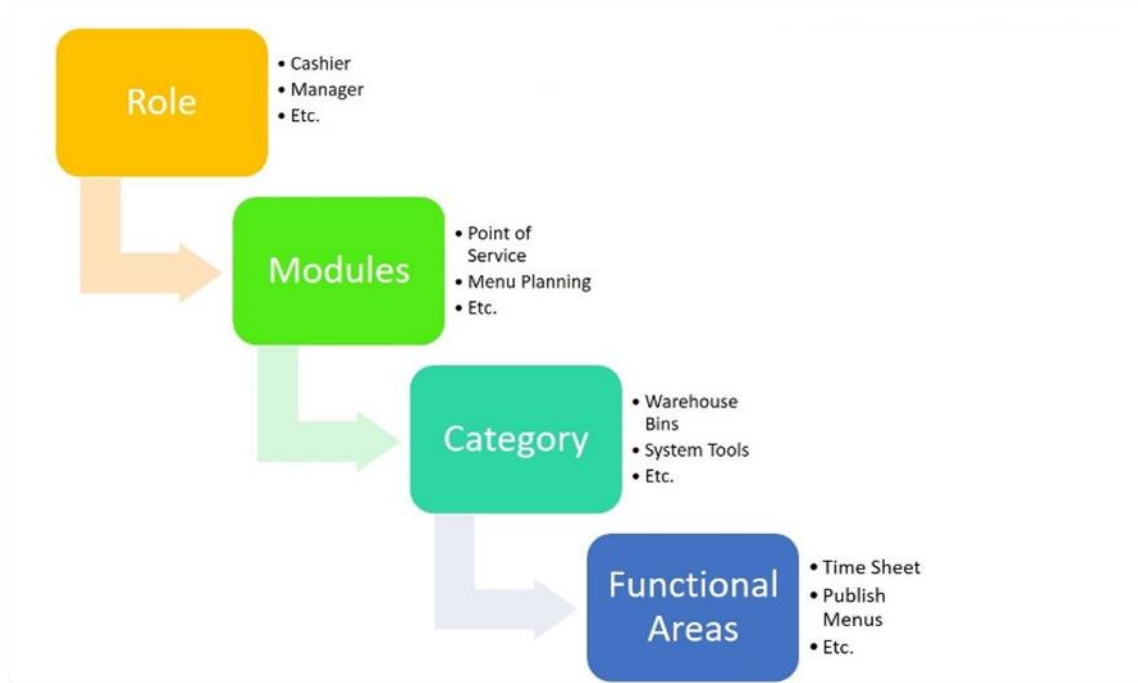


Figure 1 PrimeroEdge Software Structure

This training manual contains screen shots and stepwise instructions for navigating PrimeroEdge software. For more information on this software, see the training manual, *Navigating PrimeroEdge*.

Internet Explorer is the optimized browser for PrimeroEdge Software. Some features may be limited in other browsers.

▲ Depending upon your role such as manager or cashier and the modules selected by your organization, not all **Modules**, **Categories** and **Functional Areas** will be available to you.

2 DOCUMENT CONVENTIONS

This document uses the following typographical conventions:

- **Bold Print:** this print represents **Modules, Categories, Functional Areas** and key names such as **Tab** or **Enter** keys.
- *Italics:* this print represents messages such as *User has been added successfully*. This print represents variable information such as information you type on command lines.
- **Buttons:** Bold print and/or a graphic image of a button represents button names such as **Apply**.
- **Selection Sequences:** The names of each **Module, Category** and **Functional Area** also act as a tool for navigation when placed between arrows. Arrows represent selection sequences in order from left to right as in **Module > Category > Functional Area**. An example of a sequence is **Point of Service > Sites and Users > Roles**.

Icons in this document alert the reader to special information.

- The green check box represents helpful tip.
- The red triangle ▲ represents a warning with critical task information.
- The blue circle ● represents a status note.

Appendix A contains a **Note-taking Template** for use in this and other PrimeroEdge courses.

3 MENU PLANNING

The **Menu Planning Module** contains five **Categories**

1. **Ingredients**
2. **Menus**
3. **Reports**
4. **Configuration**
5. **Forecast**

The goal of **Menu Planning** is to create **Menu Calendars** for use in the production of **Menu Items**.

▲ You must complete the **Configuration** process before starting the **Menu Planning** module.

When completed, you can then start the primary tasks of adding **Ingredients, Recipes, Menus**, etc.

Your PrimeroEdge Implementation team will assist and support the setup of these processes for you during **Configuration**.

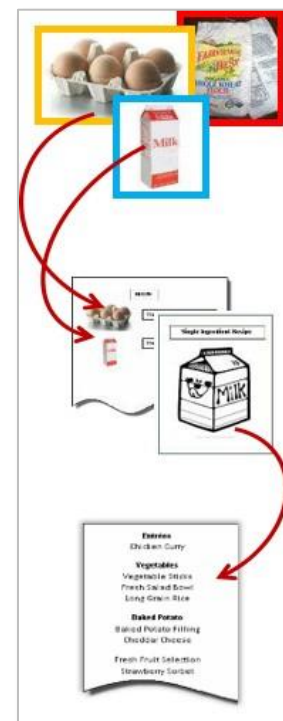


Figure 2 Ingredients to Recipes

3.1 INGREDIENTS

This **Category** contains tasks for managing **Functional Areas**. These **Functional Areas** include **Ingredients, Recipes, Stock Items, Menu Items, Find and Replace** and **Price Adjustment**.

3.1.1 SEARCH AND VIEW INGREDIENTS

This **Functional Area** contains tasks for managing **Ingredients**.

- ✓ Build recipes by adding **Ingredients** such as “raw” products like milk, eggs, flour, etc.
- ✓ Use an **Ingredient** by itself (half pint milk carton) or in combination (hamburger buns and meat patties).
- ✓ Use the **Measurement Converter** in the upper left corner of the **Quick Ingredients** window to assist with **Ingredients** calculations

1. Go to **Menu Planning > Ingredients > Ingredients**
2. View the **Ingredient Main Page**

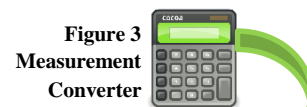


Figure 4 Ingredients

3. Filter selections by **Ingredient Code, Ingredient Name, Commodity/Recipe Code, Manufacturer/Brand, Product Code, Stock Item #, Data Source, Show Only Locally Grown, Tags, Include Discontinued Ingredients** and/or **Matching Criteria (Exact Match or Smart Search)**
4. Click the **Apply** button at the bottom of the **Ingredients** window
5. Click the **Reset** button to search for another **Ingredient**

- Select the correct **ingredient** by clicking on the **blue hyperlink** under the **Ingredient Code** column header

Ingredients List						
Ingredient Code	Ingredient Name	Ingredient Short Name	Manufacturer	Commodity/Rec code	Stock Item #	Data Source
LI100151	100% Whole Wheat Bagel, 2.5 oz, IWw	100% Whole Wheat Bagel, 2.5 oz, IWw	Buena Vista Foods			Local <input type="button" value="Discontinue"/>
LI100148	30 lb Frozen Cut Corn	30 lb Frozen Cut Corn	Seneca		1695022	Local <input type="button" value="Discontinue"/>
LI100163	3x7 BBQ Chicken Whole Grain Flatbread, Bulk	3x7 BBQ Chicken Whole Grain Flatbread, Bulk	Ardella's		skb1001	Local <input type="button" value="Discontinue"/>
LI100051	Apple Slices, Unsweetened,C	Apple Slices			9800062	Local <input type="button" value="Discontinue"/>
LI100177	Bacon, Turkey Fully Cooked Jennie O	Jennie O Turkey Bacon	Jennie O		8938129	Local <input type="button" value="Discontinue"/>
LI100017	Bagel Half; Bake Crafters,Individual; Wrapped; as served 221	BAGEL HALF, IW 221	Bake Crafters Food Company			Local <input type="button" value="Discontinue"/>
LI100021	Bananas, small	Bananas, small	Dole		9817925	Local <input type="button" value="Discontinue"/>
LI100113	Basil	Basil				Local <input type="button" value="Discontinue"/>
LI100066	Beef Taco Filling, Tyson				11282	Local <input type="button" value="Discontinue"/>
LI100077	Black Pepper	Black Pepper			6184850	Local <input type="button" value="Discontinue"/>

2 3 4 5 6 7 8 9 10 ...

Page size:
10625 items in 1063 pages

Figure 5 Ingredients List

7. Click on the **Add New Ingredient** link in the upper left corner of the **Ingredients** window
8. View the **Quick Ingredients** window

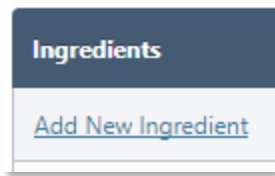


Figure 6 Add New Ingredient Link

The screenshot shows a window titled 'Quick Ingredients'. At the top left, there is a 'Data Source' dropdown menu set to 'Local'. Below this is a tabbed interface with the 'Ingredient' tab selected. The 'Ingredient' tab has two checkboxes: 'Auto Save when switching tabs' (checked) and 'No prompts' (unchecked). Underneath is a 'General' sub-tab. The main area is titled 'Ingredient Information' and contains a 'Save' button in the top right corner. The form fields include:

- Ingredient Code: (empty text box)
- Ingredient Name *: Required (text box containing 'Required')
- Ingredient Short Name: (empty text box)
- Ingredient Form: -- SELECT -- (dropdown menu)
- Sub Ingredients: (empty text area)
- Display Weight in Recipe Steps: (checkbox, unchecked)
- Standard Recipe Directions: (empty text area)
- Manufacturer: (empty text box)
- Product Code: (empty text box)
- Commodity/Recipe Code: (empty text box)
- Locally Grown: (checkbox, unchecked)

Figure 7 Quick Ingredients

3.1.1.1 GENERAL

This **Functional Area** contains tasks for managing the **General** tab of **Ingredient Information**.

1. View the **General Tab** from the **Quick Ingredients** window

Ingredient

Name: **FLATBREAD SAUSAGE EGG CHEESE 96CT IW** Ingredient Report

General | Nutrients | Allergens | Buying Guide | Documents (0) | History

Ingredient Information Copy...

Ingredient Code: 119943

Ingredient Name *: FLATBREAD SAUSAGE EGG CHEESE 96CT IW

Ingredient Short Name: FLATBREAD SAUSAGE EGG CHEESE 96CT IW

Ingredient Form: As Served ▼

Sub Ingredients:

Display Weight in Recipe Steps:

Standard Recipe Directions:

Create Recipe in Data Source: Local ▼

Manufacturer: SCHWAN'S FOOD SERVICE

Product Code: 072180685596

Commodity/Recipe Code:

Locally Grown:

Producer: ▼

Distributor: ▼

Tags

- Entrees (525)
- Meals (525)
- Side Dishes (520)

Serving Measures

Serving Size	Weight In Grams
1 Piece/Portion/Unit/Item/Serving (CN 20)	68.0000

Figure 8 Quick Ingredients General Tab

2. Click on the **Ingredient Report** button in the upper right corner of the **Ingredient** window to view a **Report**

Ingredient Name: FLATBREAD SAUSAGE EGG CHEESE 96CT IW
Ingredient Code: 119943

Measure	Weight In Grams
1 Piece/Portion/Unit/Item/Serving (CN 20)	68.0000

Nutrients per 100 g

Calories (Kcal)	Fat (g)	Sfat (g)	TFat (g)	Chol (mg)	Na (mg)	Carb (g)	TDF (g)	Sugars (g)	Pro (g)	Fe (mg)	Ca (mg)	A,IU	VitC (mg)	Mois (g)	Ash (g)
220.590	8.820	2.940	0.000	51.470	455.880	25.000	2.940	4.410	10.290	1.590	147.060	0.000	0.000	(M)	(M)

(M) Indicates missing nutrient values.
Powered by PrimeroEdge for: Edge County Schools

Figure 9 Ingredient Report

3. Click on the **Copy** button in the upper right corner of the **Ingredient Information** window to **Copy** the Ingredient information

Copy Ingredient

Data Source: Local

Name for the copy: Copy of FLATBREAD SAUSAGE EGG CHEESE 96CT IW

Short Name for the copy: Copy of FLATBREAD SAUSAGE EGG CHEESE 96CT IW

Copy Cancel

Figure 10 Copy Ingredient

4. Click the **Copy** button in the lower right corner of the **Copy Ingredient** window to **Copy** the **Ingredient** to a new **General** tab or click **Cancel**, as needed
5. Filter selections by **Data Source**, **Name for the Copy** and **Short Name for the Copy**

3.1.1.2 NUTRIENTS

This **Functional Area** contains tasks for managing the **Nutrients** tab of the **Ingredient Information**.

View the **Nutrients** tab from the **Quick Ingredients** window

Nutrient	Is Missing	Per Serving	%DRV *	% of Calories Per 100 gram
Serving Size	100	Gram		
Calories		220.59	kcal	220.590 kcal
Total Fat		8.82	g	35.99 % 8.820 g
Saturated Fat		2.94	g	12.00 % 2.940 g
Trans Fat	<input type="checkbox"/>	0	g	0.000 g
Cholesterol	<input type="checkbox"/>	51.47	mg	51.470 mg
Sodium	<input type="checkbox"/>	455.88	mg	455.880 mg
Carbohydrate		25	g	45.33 % 25.000 g
Total Dietary Fiber	<input type="checkbox"/>	2.94	g	2.940 g
Sugars	<input type="checkbox"/>	4.41	g	8.00 % 4.410 g
Protein		10.29	g	18.66 % 10.290 g
Iron	<input type="checkbox"/>	1.59	mg	8.83 % 1.590 mg
Calcium	<input type="checkbox"/>	147.06	mg	14.71 % 147.060 mg
Vitamin A (IU)	<input type="checkbox"/>	0	IU	0.00 % 0.000 IU
Vitamin C	<input type="checkbox"/>	0	mg	0.00 % 0.000 mg
Moisture	<input checked="" type="checkbox"/>		g (M)	g (M)
Ash	<input checked="" type="checkbox"/>		g (M)	g (M)

(M) Indicates missing nutrient values.

Figure 11 Quick Ingredients Nutrients Tab

3.1.1.3 ALLERGENS

This **Functional Area** contains tasks for managing the **Allergens** tab of the **Ingredient Information**.

View the **Allergens** tab from the **Quick Ingredients** window

Standard Allergens None Indicated

Allergen Indicator	Allergen	Added By	Added On	Modified By	Modified On
<input type="checkbox"/> Contains	Candy				
<input type="checkbox"/> Contains	Cookies				
<input type="checkbox"/> Contains	Crustacean Shellfish				
<input type="checkbox"/> Contains	Egg				
<input type="checkbox"/> Contains	Fish				
<input type="checkbox"/> Contains	Gluten				
<input type="checkbox"/> Contains	Milk				
<input type="checkbox"/> Contains	Ofe				
<input type="checkbox"/> Contains	Peanuts				
<input type="checkbox"/> Contains	Soy				
<input type="checkbox"/> Contains	Strawberry				
<input type="checkbox"/> Contains	Tree nuts				
<input type="checkbox"/> Contains	Uche				
<input type="checkbox"/> Contains	Utara				
<input type="checkbox"/> Contains	Wheat				

Allergen Feature Disclaimer

1. The standard list of allergens available in the PrimeroEdge "Allergen" feature is taken from the Food Allergen Labeling and Consumer Protection Act of 2004 (FALCPA) plus the addition of gluten. FALCPA allergens include: Crustacean Shellfish, Egg, Fish, Gluten, Milk, Peanuts, Soy, Tree Nuts and Wheat.
2. The PrimeroEdge "Allergen" feature is a tool to help SFAs identify FALCPA allergens and gluten in ingredients and recipes.
3. PrimeroEdge does NOT identify any allergens.
4. USDA CN database does NOT include allergen information.
5. The effectiveness of the PrimeroEdge "Allergen" feature is dependent upon the data provided by authorized users within the system.
6. No allergen information within PrimeroEdge should ever be considered a guarantee or recommendation, but simply a best faith effort to serve our customers.
7. Neither PrimeroEdge nor the parties responsible for shared data are liable for inconsistent, incorrect, or missing allergen information.
8. Each SFA should confirm allergen data in PrimeroEdge, regardless of the data source, with the actual product labels from received goods.
9. Custom Allergens may be added for district tracking needs, but are only available per district. Custom Allergens may include sensitivities or religious preferences. Any shared Ingredients would not include district allergens. Additionally, any Custom Allergens are not required by FALCPA to be listed on nutrition fact labels and the district assumes all liabilities for any unmarked or improper allergens

Figure 12 Quick Ingredients Allergens Tab

3.1.1.4 BUYING GUIDE

This **Functional Area** contains tasks for managing the **Buying Guide of the Ingredient Information**.

Link your Ingredients to **Stock Items** in the **Buying Guide** tab.

1. View the **Buying Guide** tab from the **Quick Ingredients** window

Stock Items

Ingredient Stock Item Link Data Source: Local

Stock Item *: Required Create Stock Item...

Prep Method *: Required

Whole Unit:

Broken Unit Description:

Broken Units per Whole Unit:

Data Source	Cost (\$)
No records to display.	

Fair Market Value/Standard Price:

Broken Unit Size:

Broken Unit Weight *:

Edible Portion Factor: 1.0000

Display Item Weight in Production:

(*) - Enter the Broken Unit Weight for correct Production Order/Withdrawal operation and costing.

CN Buying guide:

Ingredient Description	Purchase Unit	Preparation Description	Edible Portion
Buying guide information not available			

Cost Per Serving Measure

Serving Size	Weight In Grams	Cost
1 Piece/Portion/Unit/Item/Serving (CN 20)	68.000	0.00

Figure 13 Quick Ingredients Buying Guide Tab

2. Complete selections for **Ingredient Stock Item Link Data Source**, **Stock Item**, **Broken Units per Whole Unit** and/or **Fair Market Value/Standard Price**

3. Click on the **Documents** tab

3.1.1.5 DOCUMENTS

This **Functional Area** contains tasks for managing the **Documents** for the **Ingredient Information**.

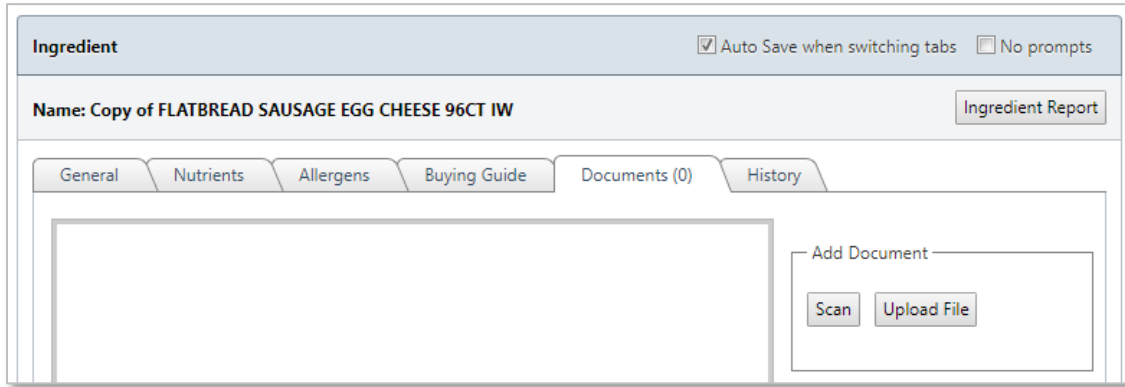


Figure 14 Documents

1. Click on the **Scan** button to utilize a scanner connect directly to your computer
2. Click on the **Upload File** button to **Upload a File** with the correct format from your computer

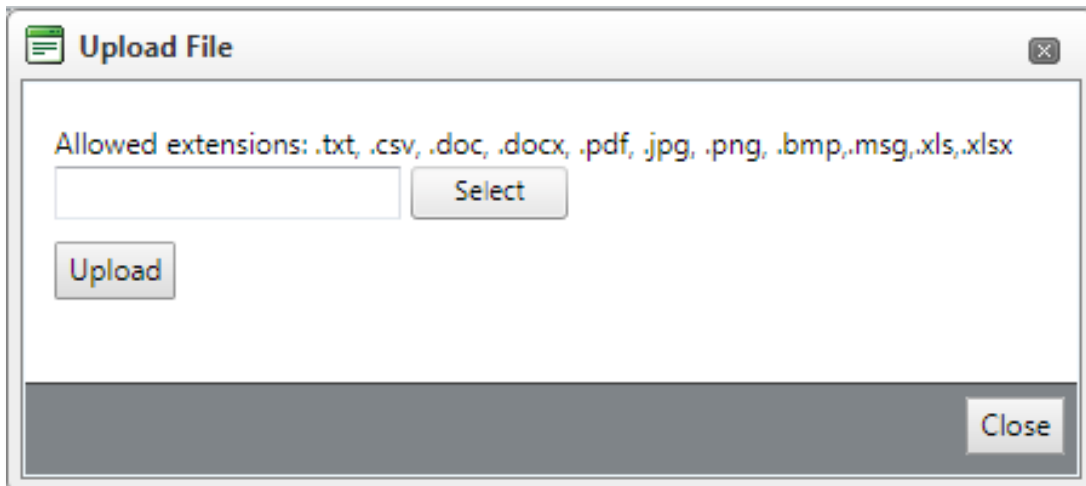


Figure 15 Upload File

3.1.1.6 HISTORY

This **Functional Area** contains tasks for managing the **History** of the **Ingredient Information**.

1. Filter selection from **Filter On** dropdown menu

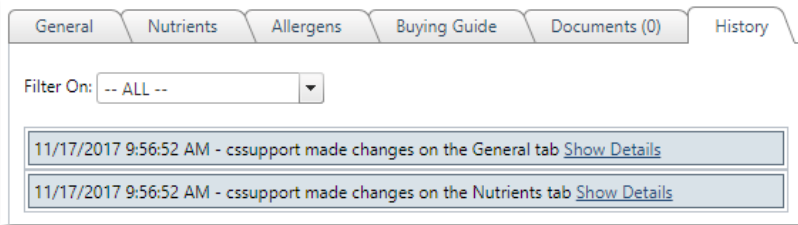


Figure 17 History Tab

2. Click on the **Show Details** links to the right of the **History** window to view additional **Details**

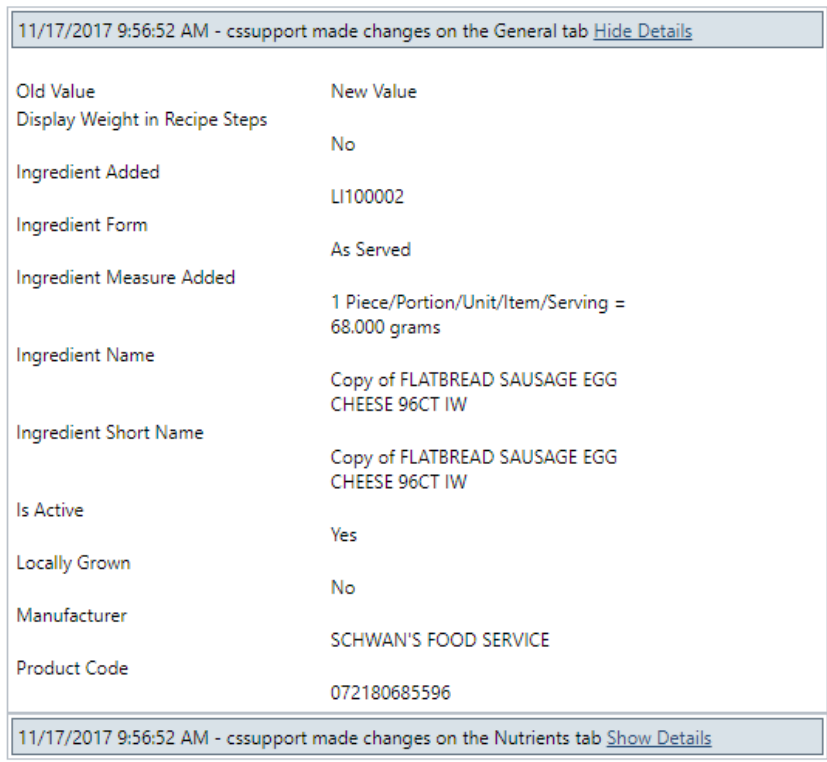


Figure 18 History Details View

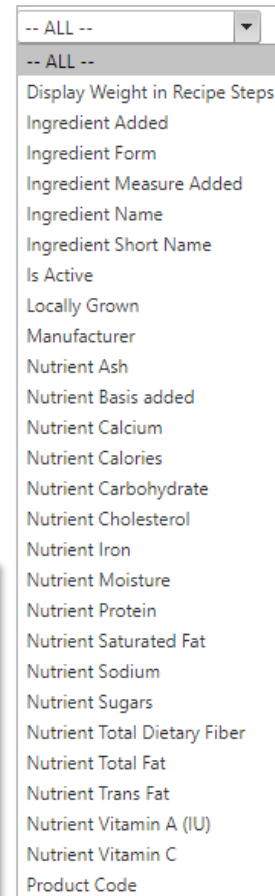


Figure 16 History Filter On Dropdown Menu

3.1.2 RECIPES

This **Functional Area** contains tasks for managing **Recipes**. There are two types of Recipes.

- **Single Ingredient Recipes** refer to a food item served without the addition of ingredients such as 8 oz. milk carton, frozen pizza, fresh fruit, etc.
- **Dual Entry Recipes** refer to recipes created from multiple ingredients or food items that will be cooked and/or created for menu service.

3.1.2.1 SINGLE INGREDIENT RECIPE

This **Functional Area** contains tasks for creating a **Single Ingredient Recipe**.

1. Go to **Menu Planning > Ingredients > Ingredients**
2. From the Ingredient Main Page, use any of the **search** text boxes to search for desired Ingredient
3. Click the **Apply** button in the lower half of the **Ingredients** window

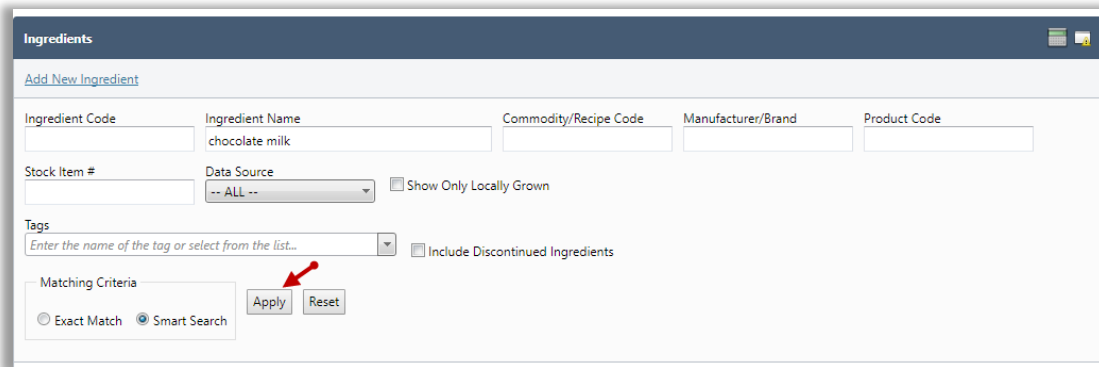


Figure 19 Ingredient Search

4. Choose desired the **Ingredient** from the **Ingredient List** at the bottom of the screen by clicking on the **blue hyperlink**

Ingredient Code	Ingredient Name	Ingredient Short Name	Manufacturer	Commodity/Recipe code	Stock Item #	Data Source	
LI100019	Milk, Chocolate	Milk, Chocolate			DD102	Local	Discontinue
19146	Baking chocolate, MARS SNACKFOOD US, M&M's Milk Chocolate Mini Baking Bits	BAKING CHOC,MARS SNACKFOOD US,M&M'S MILK CHOC MINI BAK BITS				Child Nutrition Database	
43078	Beverage, milkshake mix, dry, not chocolate	BEVERAGE,MILKSHAKE MIX,DRY,NOT CHOC				Child Nutrition Database	

Figure 20 Ingredient List

5. From the **Ingredient General** tab, click on **Create Recipe** in the middle of the screen

6. Go to the **Recipe General Tab**
7. Add the **Recipe** information and any preparation and /or serving instructions
8. Click the **Save** button in the upper right corner

Figure 21 Recipe Tab

Figure 22 Recipe General Tab

9. Go to **Menu Item Tab** to create a Menu Item for the **Single Ingredient Recipe**
- ▲ Create a **Menu Item** first in order to utilize a **Recipe** in **Menus, Menu Cycles, Marketing Calendars** and **POS**.

10. Enter information for the **Menu Item**
11. Select the **Menu Item Category** from the drop-down list
12. Click **Show in Summary** if you want the **Menu Item** to show up in **Nutritional Analyses**
13. Select the appropriate **Leftover Category** from the drop-down list

☑ To carry over a Menu Item, indicate the **Maximum Carryover Days** in this section.

14. Click the **Save** button in the upper right corner of the window

3.1.2.2 MENU ITEMS FOR RECIPES

This **Functional Area** contains tasks for managing **Menu Items** for **Recipes**.

Figure 23 Menu Item Tab

1. Go to the **Menu Item** tab in the **Ingredient** window
2. Find the serving size you initially entered for your recipe

In this case, it should be **1.000 Each** and will be designated as the **Default Serving Size** for this particular **Menu Item**.

▲ You can add as many **Menu Item Serving Sizes** as needed, but only one can be the default.

☑ You can use an alternate serving size based on the information entered for the **Menu Item** used for different serving groups. This is particularly convenient for **Menu Items** that may need different serving sizes based on the serving group for a menu (i.e. Elementary students may only receive 4 chicken nuggets, while the high school students may receive 6 chicken nuggets).

3.1.2.3 CONTRIBUTIONS FOR RECIPES

This **Functional Area** contains tasks for entering **Contribution** information.

▲ These tasks are required for **Meal Pattern Analysis** to run correctly.

1. Select the appropriate information at the top of the **Meal Pattern** section if applicable
2. Select the appropriate **Contribution Quantity** for each **Food Component**. Some **Menu Items** may have more than one **Food Component**. Select all that are applicable.

Food Component	Contribution
Fruits (cups)	Fruit
Fluid Milk (cups)	1 MILK-F
Meat/Meat Alternates (oz eq.)	Meat/MA
Grains (oz eq.)	
Whole Grain-Rich	WGR
Non Whole Grains-Rich	Non-WGR
Vegetables (cups)	
Dark Green	Veg-DG
Red/Orange	Veg-RO
Beans/Peas (Legumes)	Veg-BP
Starchy	Veg-S
Other	Veg-O

Figure 24 Menu Item Contribution

☑ Entering a **Default Serving Size Exception** for different meal pattern groups will simplify menu planning for those particular groups. This means, for example, that when you are building a menu with the serving group of PK (pre-kindergarten) alongside other serving groups, the “other” groups will have 1 Each as their serving size, while the PK serving group will automatically have ½ Each as the serving size. You will not have to make manual adjustments when working on the menu.

3.1.2.4 DUAL ENTRY RECIPE

This **Functional Area** contains tasks for creating a **Dual Entry Recipe**.

1. Go to **Menu Planning > Ingredients > Recipes**
2. From the **Recipes Main Page**, click on **Add New Recipe** at the top of the screen

Figure 25 Add New Recipe

3. Complete the information in the **Recipe General Tab**
4. Click the **Save** button

▲ **Recipe Name, Serving Size and Number of Servings** are required fields.

5. Go to the **Ingredients Tab** to add ingredients. Click on **Add Step**

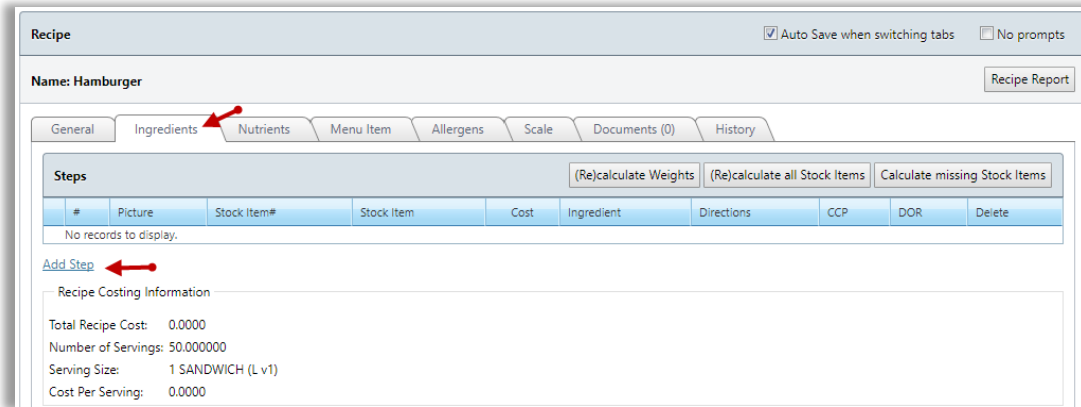


Figure 26 Recipe Ingredients Tab

6. Search for desired ingredient by **Ingredient Name** or **Ingredient Code**
7. Enter the quantity to be added
8. Add any cooking directions
9. Click the **Apply** button

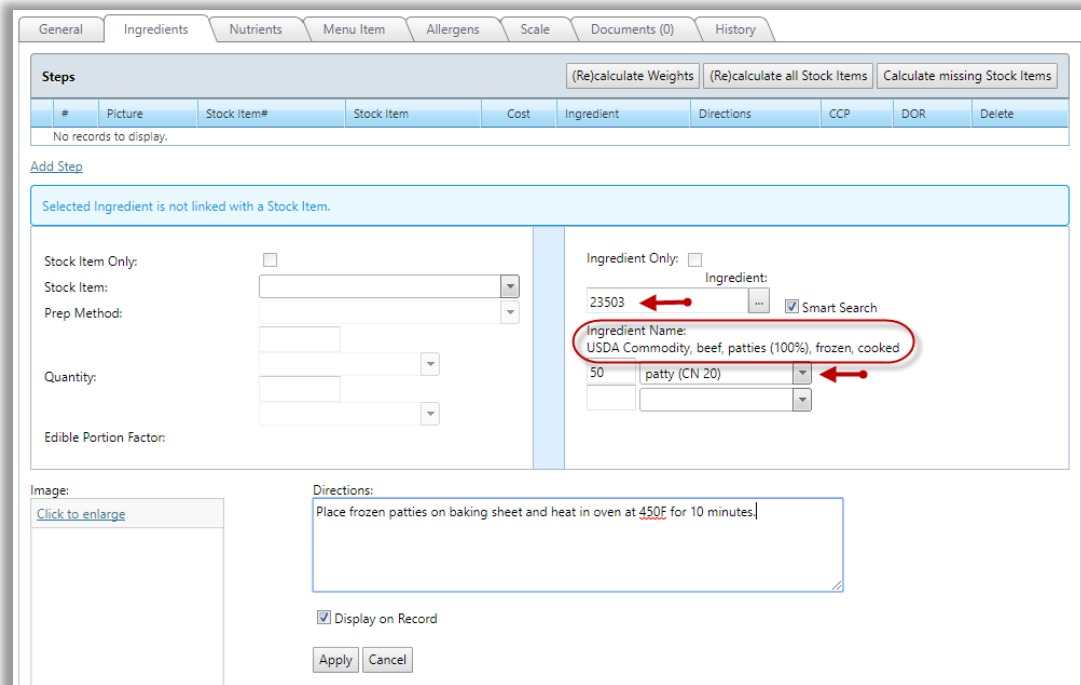


Figure 27 Add Ingredient and Directions

10. Repeat steps 5 through 9 for each ingredient in the recipe
11. Click on the **blue arrow** on the left side of each **Recipe Step** from the **Ingredients** tab to **Edit** a step
12. Make edits
13. Click the **Apply** button

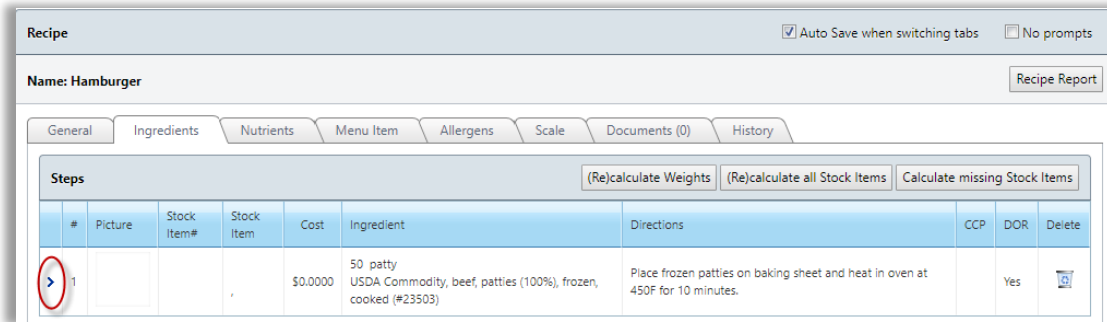


Figure 28 Edit Recipe Step

✔ The **Nutrients** and **Allergens** will automatically populate based on the **Nutrients** and **Allergens** listed for each ingredient in the **Recipe**.

14. Create a **Menu Item** by completing the same steps as described for a **Single Ingredient Recipe**

✔ Use the **Scale Tab** to scale a recipe to any desired yield.

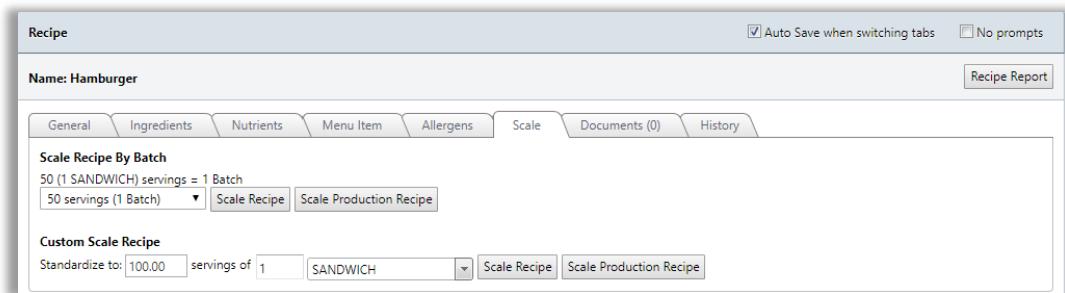


Figure 29 Scale Tab

✔ Upload documents such as pictures and food labels into the **Documents** tab for a **Recipe**. See instructions for uploading documents in the **Ingredients** section.

3.1.3 STOCK ITEMS

This **Functional Area** contains tasks for managing **Stock Items**. A **Stock Item** refers to those items that you keep physical in stock. A **Stock Item** has quantity associated with it. When using a **Stock Item**, deductions in quantity occur. A **Non-stock Item** refers to those items that you do not keep physical stock.

3.1.3.1 GENERATE A STOCK ITEM REPORT

This **Functional Area** contains tasks for managing **Stock Item Reports**.

1. Go to **Menu Planning > Ingredients > Stock Items**

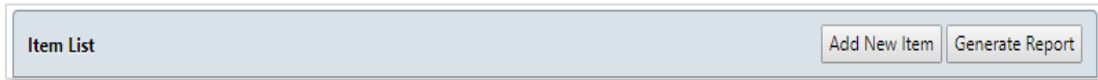


Figure 30 Stock Item Generate Report Button

2. Click **Generate Report**

The screenshot shows a window titled 'Item Detail Report' with a table of stock items. The table has columns for District Item #, Item Description, Brand Name, Pack Size, Active, Vendor Name, and Contract. The report was generated on 9/11/2017 at 3:01:04 PM by Cybersoft Support.

District Item #	Item Description	Brand Name	Pack Size	Active	Vendor Name	Contract
serw1234	Baking Powder		Case	Yes	XYZ Grocery	(04/22/2013-12/31/9999)
DST1002	Baking Soda	Calber's	Case	Yes	Central Warehouse	(05/08/2013-12/31/9999)
DST1002	Baking Soda	Calber's	Case	Yes	US Foods	(03/26/2013-12/31/9999)
9802400	BANANA BUNCH 2.5 COLOR	BANANA	Case	Yes	Labatt - KC test	(12/21/2015-12/31/9999)
9802500	BANANA BUNCH 3 COLOR	BANANA	Case	Yes	Labatt - KC test	(12/21/2015-12/31/9999)
9800030	BANANA CHIPS	WOODLAND	Case	Yes	Labatt - KC test	(12/21/2015-12/31/9999)
9812231	BANANA QUAD 25CT *	BANANA	Case	Yes	Labatt - KC test	(12/21/2015-12/31/9999)
9802000	BANANA QUADS #3-4 COLOR	BANANA	Case	Yes	Labatt - KC test	(12/21/2015-12/31/9999)
9817925	BANANAS, Fresh, 50 lb case	BANANA	Case	Yes	Labatt - KC test	(12/21/2015-12/31/9999)
4474725	Band aids		Case	Yes	American Beauty	(05/10/2017-12/31/9999)
9985017	BAR TOWELS LTDBMR-28	ACEMART	Case	Yes	Labatt - KC test	(12/21/2015-12/31/9999)
2423507	BASE BEEF NO MSG	FRANK COLN	Case	Yes	Labatt - KC test	(12/21/2015-12/31/9999)

Figure 31 Item Detail Report

3. Click the **Inverted Triangle** at the top of the screen to download the report
4. Select one of the report formats for your download

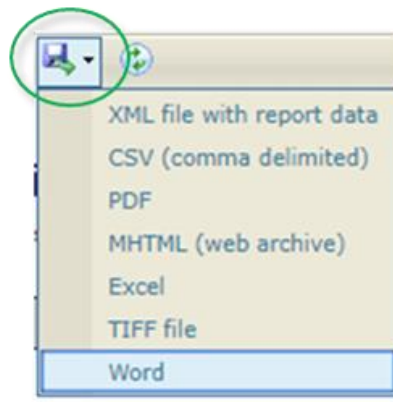


Figure 32 Report Controls

3.1.4 MENU ITEMS

Menu Item result during **Recipe** creation. You can make edits to a **Menu Items** two different ways: **Editing** in the **Menu Item** tab for a **Recipe** or by completing the following steps.

1. Go to **Menu Planning > Ingredients > Menu Items**
2. Use any of the **search** text boxes to search for desired **Menu Item**
3. Click the **Apply** button
4. Select the desired **Menu Item** by clicking on the **Blue hyperlink**

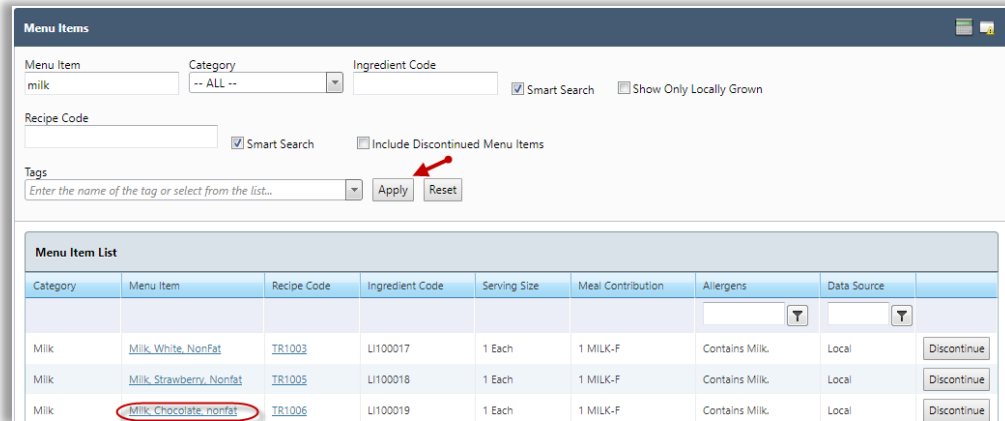


Figure 33 Menu Item Search

5. View the **Menu Item Tab** for a **Single Ingredient Recipe** or **Dual Entry Recipe**
6. Make the appropriate edits
7. Click the **Save** button in the upper right corner

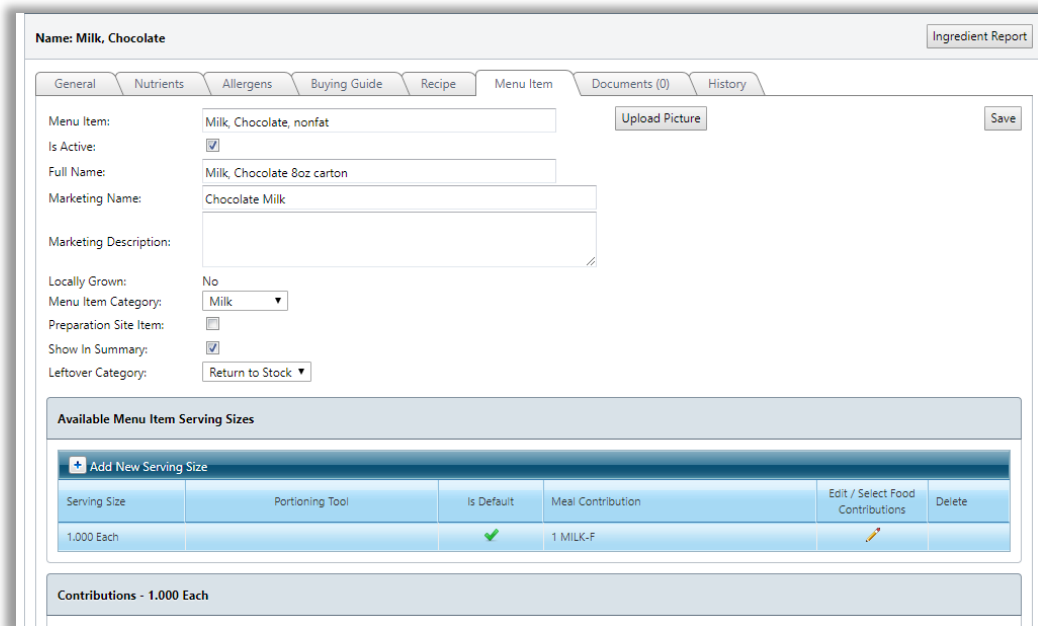


Figure 34 Menu Item Tab

3.1.5 FIND AND REPLACE

This **Functional Area** contains tasks for managing **Find and Replace**. These tasks including replacing all of one ingredient within several recipes at one time. **Find and Replace** allows you to choose **Ingredients, Recipes** and/or **Menu Items** to replace.

1. Go to **Menu Planning > Ingredients > Find and Replace**
2. Select **Find and Replace** (or Find Only)
3. Select the criteria of what you would like to **Find**
4. Select the item from the drop-down menu
5. Select the criteria of what you would like to **Replace**
6. Select the item from the drop-down list
7. Click **Find**

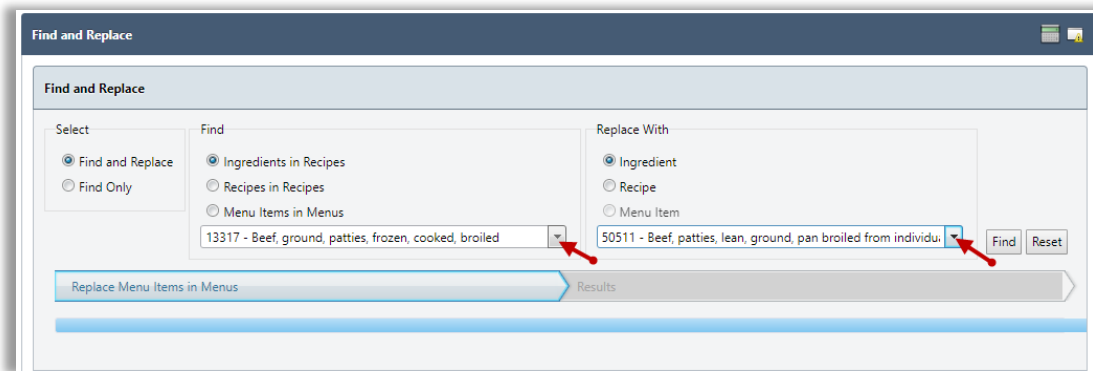


Figure 35 Find and Replace

3.1.6 PRICE ADJUSTMENT

This **Functional Area** contains tasks for managing **Price Adjustments**.

1. Go to **Menu Planning > Ingredients > Price Adjustment**

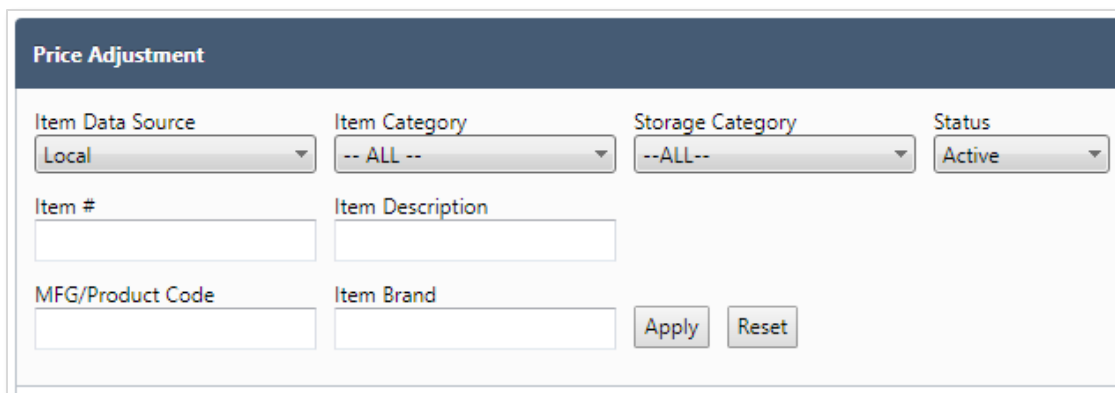


Figure 36 Price Adjustment

2. Filter selections by **Item Data Source, Item Category, Storage Category, Status, Item #, Item Description, MFG/Product Code** and/or **Item Brand**
3. Click the **Apply** button in the lower right of the window
4. View the list of **Stock Items**

Stock Items						Price Data Source	Local	
Item Category	Storage Category	Brand Name	Product Code	Item #	Item Description	Pack Size	Current Price	New Price
SHARED-Beverage	SHARED-Dry storage	Gatorade		NOBID_SL1_AR100	NONBID-SHARED-Gatorade Fruit Punch 24-11.5oz cans	24 Can (1.0000 ea.) /Case	11.10	<input type="text"/>
SHARED-Beverage	SHARED-Dry storage	Gatorade		NOBID_SL1_AR102	NONBID-SHARED-Gatorade Orange 24-11.5oz cans	24 Can (12.0000 oz.) /Case	11.10	<input type="text"/>
SHARED-Beverage	SHARED-Dry storage	Gatorade		NOBID_SL1_AR103	NONBID-SHARED-Gatorade Berry 48-12oz bottle--linked to ingredient ii100295 in wood county	48 Can (12.0000 oz.) /Case	21.98	<input type="text"/>
SHARED-Beverage	SHARED-Dry storage	Gatorade		NOBID_SL1_AR105	NONBID-SHARED-Gatorade Ice Punch 48-12oz bottle	48 Can (12.0000 oz.) /Case	21.98	<input type="text"/>
SHARED-Beverage	SHARED-Dry storage	Gatorade		NOBID_SL1_AR106	NONBID-SHARED-Gatorade Lemon Lime 48-12oz bottle	48 Can (12.0000 oz.) /Case	21.98	<input type="text"/>
SHARED-Beverage	SHARED-Dry storage	Switch		NOBID_SL1_AR118	NONBID-SHARED-Switch 100% Spkg Kiwi Berry 24-8.3oz	24 Can (8.3000 oz.) /Case	12.89	<input type="text"/>
SHARED-Beverage	SHARED-Dry storage	Switch		NOBID_SL1_AR121	NONBID-SHARED-Switch 100% Spkg Wtrm-Strw 24-8.3oz	24 Can (8.3000 oz.) /Case	12.89	<input type="text"/>
SHARED-Beverage	SHARED-Dry storage	Vitamin Water		NOBID_SL1_AR128	NONBID-SHARED-Vitamin Water XXX Acai-Bibry-Pomgr 24-20oz	24 Can (20.0000 oz.) /Case	25.99	<input type="text"/>
SHARED-Snacks	SHARED-Dry storage	General Mills		NOBID_SL1_AR148	lays chips	4 Bag (35.0000 oz.) /Case	35.94	<input type="text"/>
SHARED-Condiment	SHARED-Dry storage	Marzetti		NOBID_SL1_AR297	NONBID-SHARED-Marzetti Lite Ranch Dress(81978)60-1.5oz	60 Each (1.0000 oz.) /Case	11.54	<input type="text"/>

Page size:
39 items in 4 pages

Figure 37 Stock Items List

5. Click on a link under the **Item #** column header to view the **Item Info**

3.1.6.1 STOCK ITEM INFO

This **Functional Area** contains tasks for managing **Stock Item Info**.

Item Info	Vendor & Price Info	Ordering Info	Bin Configuration	POS Menu Item	History
Note: Fields marked with * are required fields					
<input checked="" type="checkbox"/> Is Active	Show sites with item On Hand				
Data Source	Local ▼				
District Item # *	DST1001				
GTIN Code					
Item Name / Description *	Flour				
Item Valuation Group	Non-Commodity ▼				
Item Type	<input checked="" type="radio"/> USDA Commodity <input type="radio"/> Non-Commodity Food <input type="radio"/> Non-Food				
Item Category *	Baking Supplies ▼				
Brand Name	Flour				
Manufacturer Name					
MFG/ Product Code					
Purchase / Whole Unit *	Bag ▼ Edit Units				
Broken Units per Whole Unit *	12				
Broken Unit Description *	bags				
Broken Unit Size	2.0000 pound ▼				
Broken Unit Weight	2 pound ▼				
Whole Units per Pallet					
Storage Category	Dry (Local) ▼				
Is Orderable in Broken Units	<input type="radio"/> Yes <input checked="" type="radio"/> No				
Fair Market Value / Standard Price *	\$ 15.00				
Commodity Value	\$				
Bid Category	Bread Goods ▼				

Figure 38 Stock Item Info Tab

6. View the **Bidding Info** for the **Stock Item**

Bidding Info

Bid Specification

Acceptable Brands

Allow Alternate Pack Sizes

**Bidding Info and Substitutions are not a part of audit trail*

Figure 39 Stock Item Bidding Info

7. View the applicable **Substitutions** for the **Stock Item**

Substitutions Save

Sub. Item #:

Bag DST1001

Interchangeable Item* :

**Items marked as "Interchangeable" must be certified by a nutritionist as having identical nutrients and meal contributions.*

Sub. Item #	Substitution Item Description	Conversion	Interchangeable Item	Entry Type	Delete
No Substitutions for the Item					

Figure 40 Stock Item Substitutions

3.1.6.2 VENDOR AND PRICE INFORMATION

This **Functional Area** contains tasks for managing **Stock Item Information & Settings**.

1. Click on the **Vendor & Price Info** tab

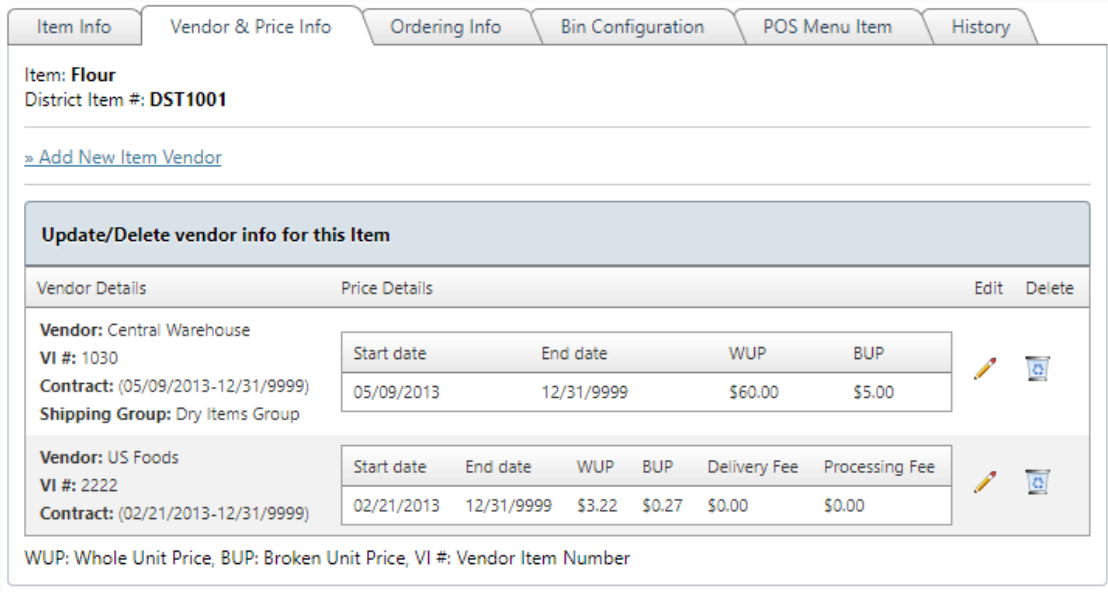


Figure 41 Vendor & Price Info Tab

2. Click on the **Add New Item Vendor** link to **Add a New Item Vendor**

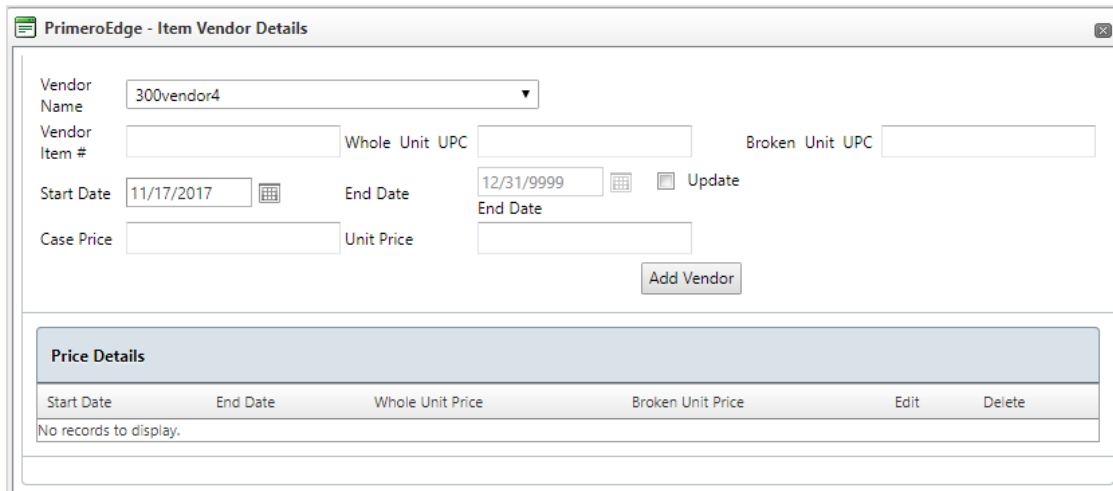


Figure 42 Item Vendor Details

3. Complete the fields for **Vendor Name**, **Vendor Item #**, **Whole Unit UPC**, **Broken Unit UPC**, **Start and End Dates** and/or click the **Update** box, complete **Case Price** and/or **Unit Price**
4. Click the **Add Vendor** button

3.1.6.3 ORDERING INFO

This **Functional Area** contains tasks for managing **Ordering Info**.

1. Click on the **Ordering Info** tab

Figure 43 Ordering Info Tab

2. Complete items as needed for **District Item Ordering Date** range in the dropdown menu

3. Click the **Apply** button in the upper left side of the **Ordering Info** window
4. Click the **Is Orderable** box, as needed
5. Click on the dropdown menus to choose **Select a vendor, Central Warehouse** or **US Foods** (in this example), as needed
6. Set the **Ordering Par Level** by typing in the minimum number to keep on hand in the box adjacent to **Bag (12 bags)**
7. Click on the **Save Par Levels** button in the upper right corner of the **Set Ordering ParLevel for Distribution Sites** window
8. **Set amounts for Maximum Item Quantity per Delivery Date, Maximum Item Amount per Deliver Date and Start Date in the Order Maximums per Site and Delivery Date** window
9. Click the **Apply** button on the right side of the **Order Maximums per Site and Delivery Date** window

3.1.6.4 BIN CONFIGURATION

This **Functional Area** contains tasks for managing **Bin Configuration**.

1. Click on the **Bin Configuration** tab

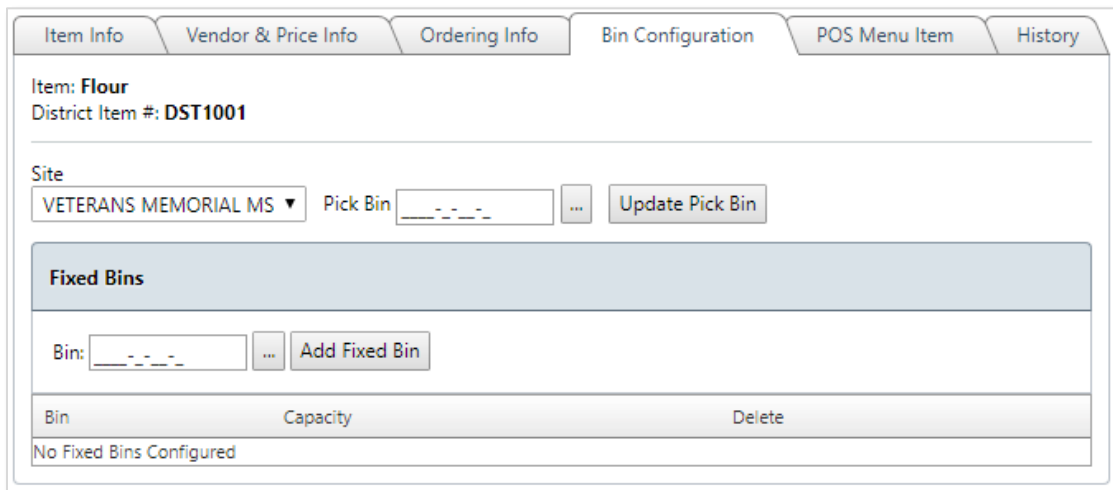


Figure 44 Bin Configuration Tab

2. Complete selections for **Site** and **Pick Bin** (use the **Three Dot Lookup** box to search and select a **Pick Bin**)
3. Click the **Update Pick Bin** button, as needed
4. Complete the **Fix Bin** location, as needed
5. Click on the **Add Fixed Bin** button, as needed

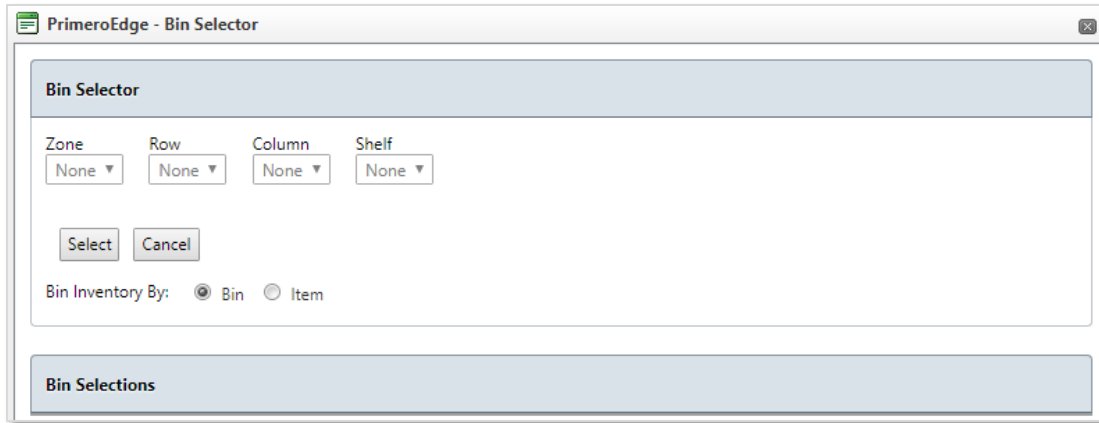


Figure 45 Bin Selector

6. Complete the **Bin Selector Zone, Row, Column and Shelf** for the **Pick Bin and Fixed Bin Items**

3.1.6.5 POS MENU ITEM

This **Functional Area** contains tasks for managing **POS Menu Items**.

1. Click on the **POS Menu Item** tab

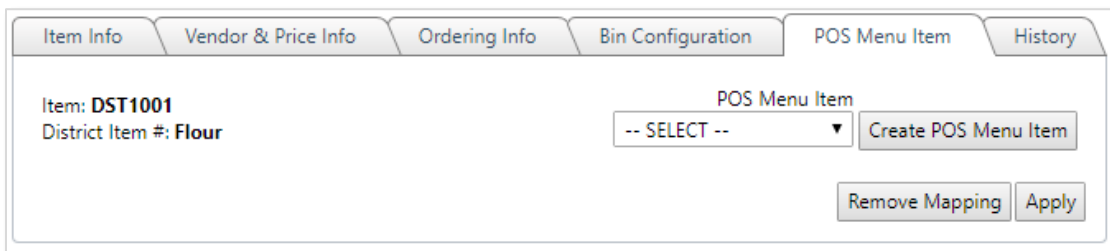


Figure 46 POS Menu Item Tab

3.1.6.6 HISTORY

This **Functional Area** contains tasks for managing **Item Information & Settings History**.

1. Click on the **History** tab

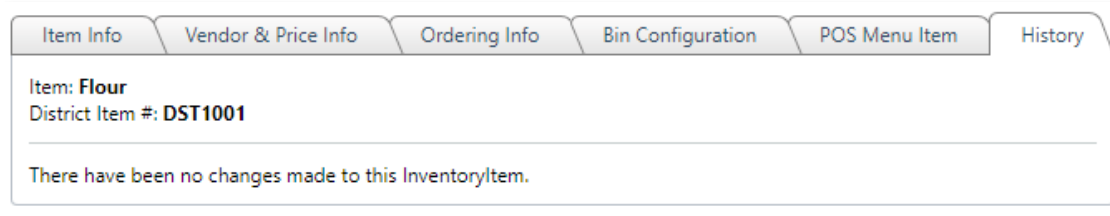


Figure 47 History Tab

3.2 MENUS

This **Category** contains tasks for managing **Functional Areas** for **Menus**. The **Functional Areas include Menus, Menu Cycles, Assign Menus, Multi-line Analysis** and **Publish Menu**.

Following the addition of ingredients, recipes and menu items, the next step is creating menus.

Build individual menus by day, school type and meal service. Use daily menus to create cycle menus. You receive dynamic visual feedback highlighting nutritional information and menu costs as you create menus.

The weighted analysis method allows a comparative nutrient analysis for each menu.

Locate functions related to menus/menu cycles in the **Menus** drop-down on the left side of the screen.

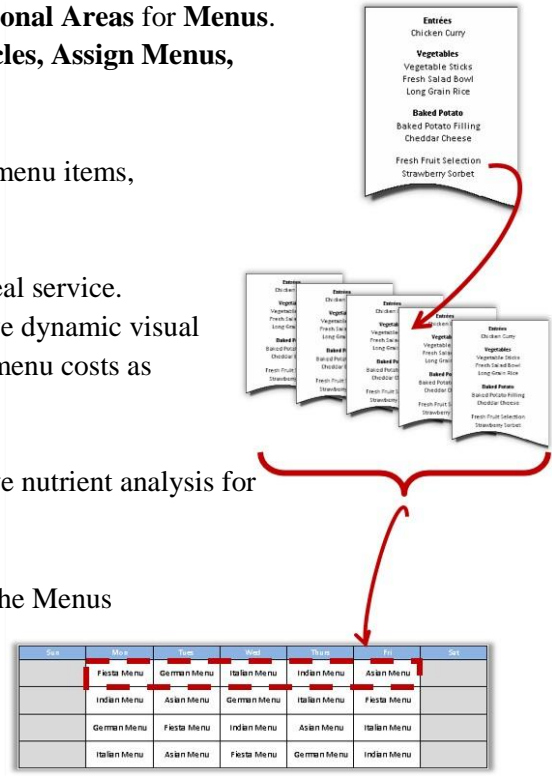


Figure 48 Find Menu Cycles

3.2.1 MENUS

Add a new **Menu** by completing the following steps.

1. Go to **Menu Planning > Menus > Menus**
2. From the **Menus** main page click **Add New Menu**

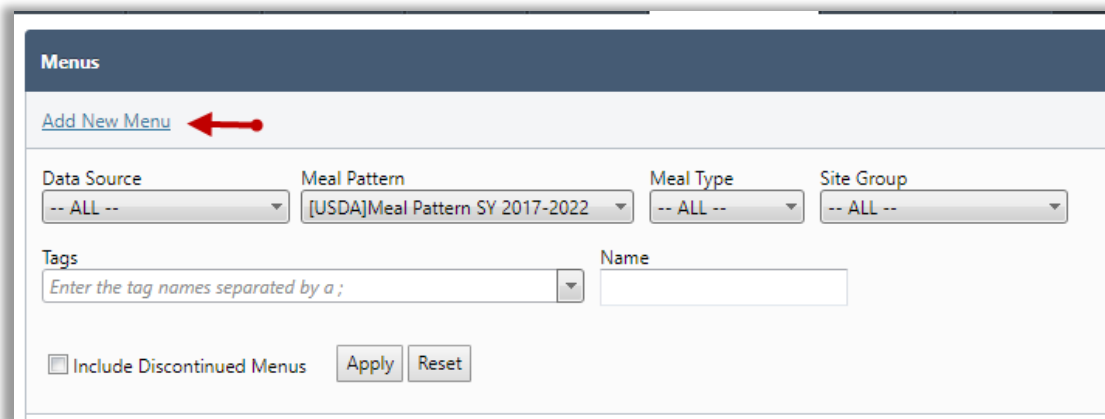


Figure 49 Add New Menu

3. From the Menu Info screen, select the appropriate **Meal Pattern, Meal Type and Site Group**. Name the Menu in the **Menu Description** text box
4. Select which **Menu Categories** will be on the menu. Enter the **minimum servings** required for each Menu Category in order for the menu to qualify for a reimbursable meal
5. Select the **Serving Group** associated with the menu and the **projected number** of meals typically served for each Serving Group. Click **Add New Menu**

The screenshot shows the 'Menu Info' application window. At the top, there's a title bar 'Menu Info'. Below it is a section titled 'Add New Menu' with a button 'Add New Menu' on the right. The form contains several dropdown menus: 'Data Source' (Local), 'Meal Pattern' ([USDA]Meal Pattern SY 2017-2022), 'Meal Type' (Lunch), and 'Site Group' (Elementary). There is a 'Menu Description' text box containing 'Week 1 Day 1 Lunch'. Below this are two checkboxes: 'Projected Servings Count as a Percentage' (unchecked) and 'Choose a Template:' (with a dropdown arrow). Underneath, it lists 'Menu Item Categories: Entrees, Grains, Vegetables, Fruits, Milk' and 'Serving Groups: K-5, Adult'. The bottom section is titled 'Menu Item Categories and Serving Groups' and contains two tables. The first table lists categories with checkboxes and minimum requirements. The second table lists serving groups with checkboxes and projected meal counts.

Include	Category	Choose (Min 1 Req.)	Include	Serving Group	Projected Meal Count (Min 1 Req.)
<input checked="" type="checkbox"/>	Entrees	1	<input type="checkbox"/>	PK	
<input checked="" type="checkbox"/>	Grains	1	<input checked="" type="checkbox"/>	K-5	400
<input checked="" type="checkbox"/>	Vegetables	1	<input type="checkbox"/>	K-8	
<input checked="" type="checkbox"/>	Fruits	1	<input type="checkbox"/>	6-8	
<input type="checkbox"/>	Condiment		<input type="checkbox"/>	9-12	
<input checked="" type="checkbox"/>	Milk	1	<input checked="" type="checkbox"/>	Adult	10
			<input type="checkbox"/>	Ala Carte	

Figure 50 Menu Item Categories and Serving Groups

6. Click **Add Menu Items** to begin adding menu items to the menu. A new pop up window will appear. Search for desired menu items by adding text in the **Category, Menu Item,** etc. text boxes
7. Once desired menu items are located, **check the box** to add the menu items to the menu
8. Click **Add** at the top right of the screen

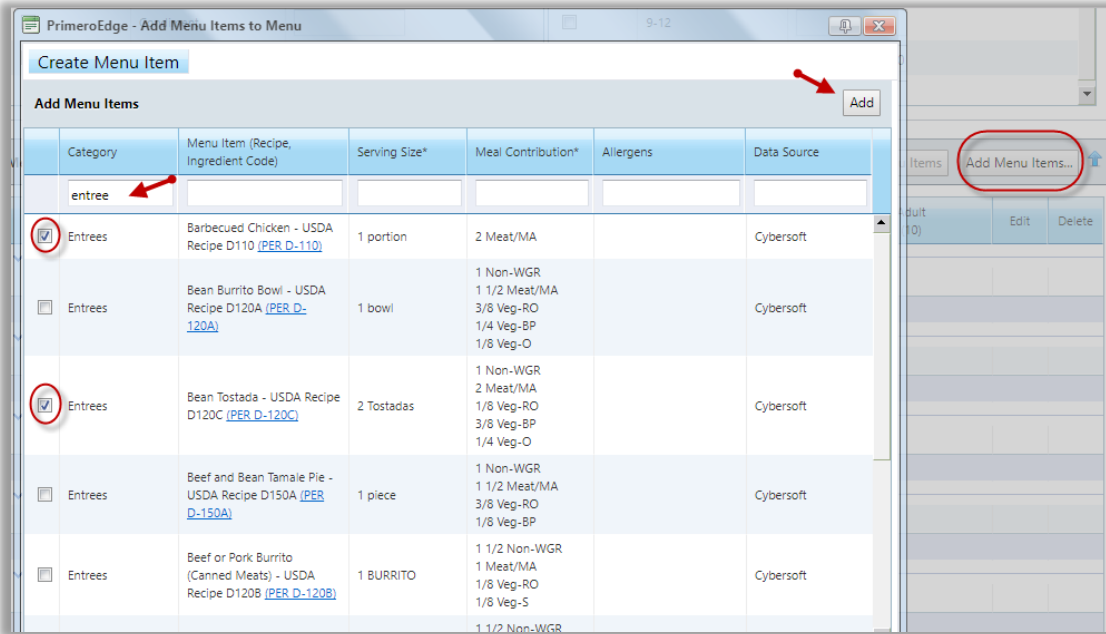


Figure 51 Add Menu Items

At this point, you can add as many menu items as you need at one time. This example shows entrees filtered and two entrees selected. You can then filter for vegetables and select all of the vegetable options, etc. When you click add, all the menu items selected join the menu.

9. Add **projected meal counts** for each menu item and serving group.
10. Click the **Save** button

Notice the floating **Save** button on the lower left side of the screen. If you need to leave the menu before it is completed, click **Save**. This prevents you from having to scroll all the way to the top of the page.

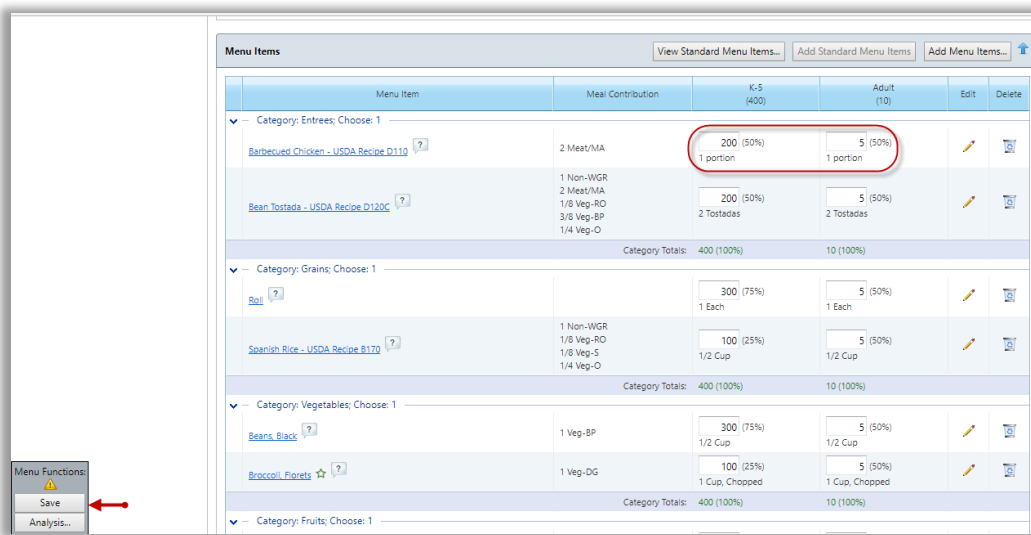


Figure 52 Add Projected Meal Counts

Check the **Nutritional Analysis** for your menu by completing the following steps.

1. Click on **Analysis** from either the floating button on the bottom left of screen or click on **Analysis** at the top right of screen
2. A new pop up window will appear showing the **Nutritional Summary**
3. Click on the **Nutrition Report** button for a printable version

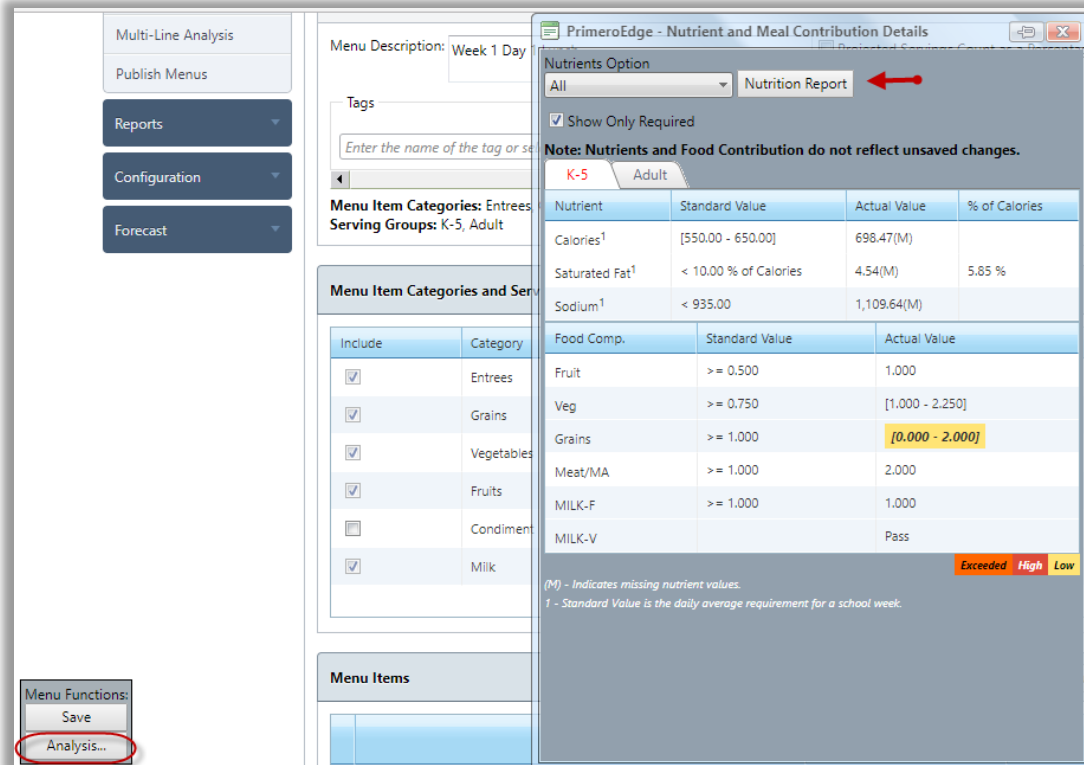


Figure 53 Nutritional Analysis

3.2.2 MENU CYCLES

A **Menu Cycle** is a collection of daily menus for use at any time cycle you determine (weekly, monthly, etc.). Creating **Menu Cycles** will help save time when it comes to entering menu information into your production plans.

Create a **Menu Cycle** by completing the following steps.

1. Go to **Menu Planning > Menus > Menu Cycles**
2. From the **Menu Cycles** main page, click on **Add New Menu Cycle**

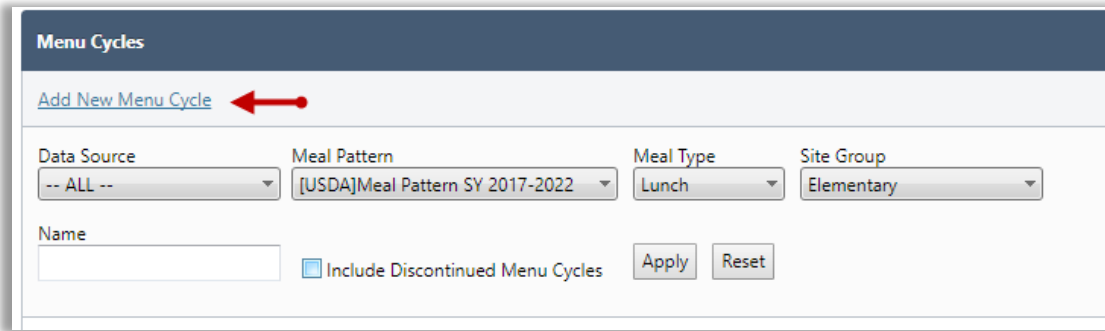


Figure 54 Add New Menu Cycle

3. Create a **Menu Cycle Name**. Select the appropriate **Meal Pattern, Meal Type and Site Group**
4. Complete the desired **number of weeks** in the cycle and **days per week**
5. Click the **Save** button
6. Go to **Menu Cycle Details** at the bottom of the page
7. Click on **Choose Menu**
8. View the new pop up window and search for desired menu by **Name**
9. Click the **Apply** button
10. Select desired menu by clicking on the **Blue Hyperlink** for the menu

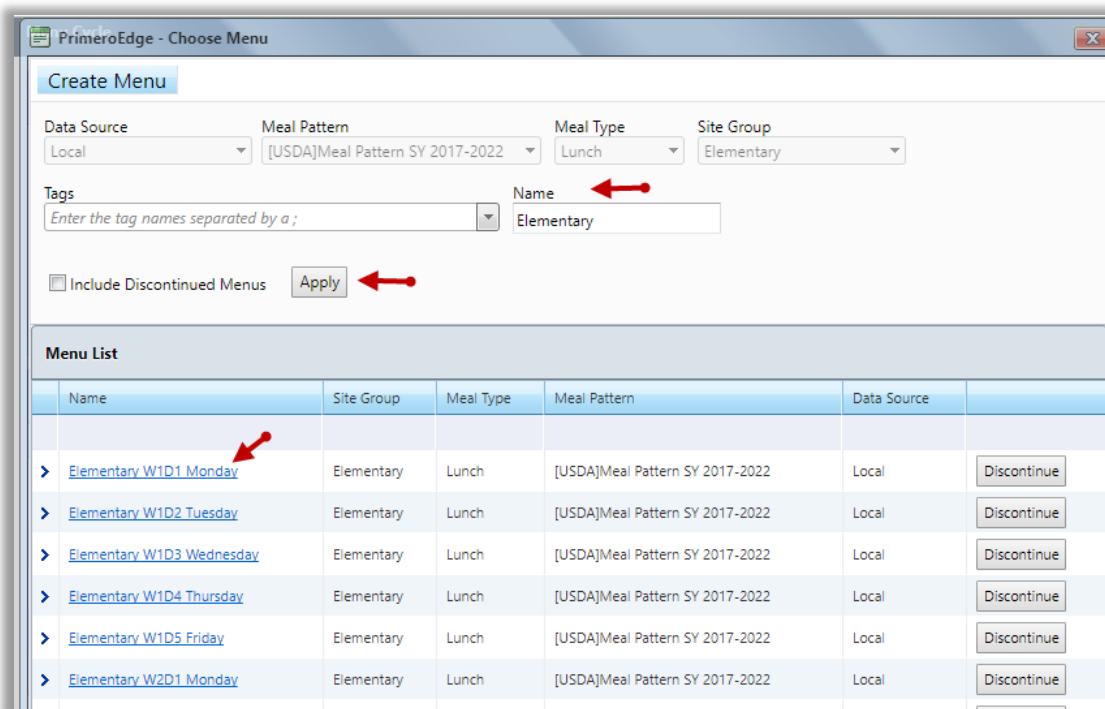


Figure 55 Choose Menu

11. Repeat steps 6-10 until you have selected all of the menus for the cycle

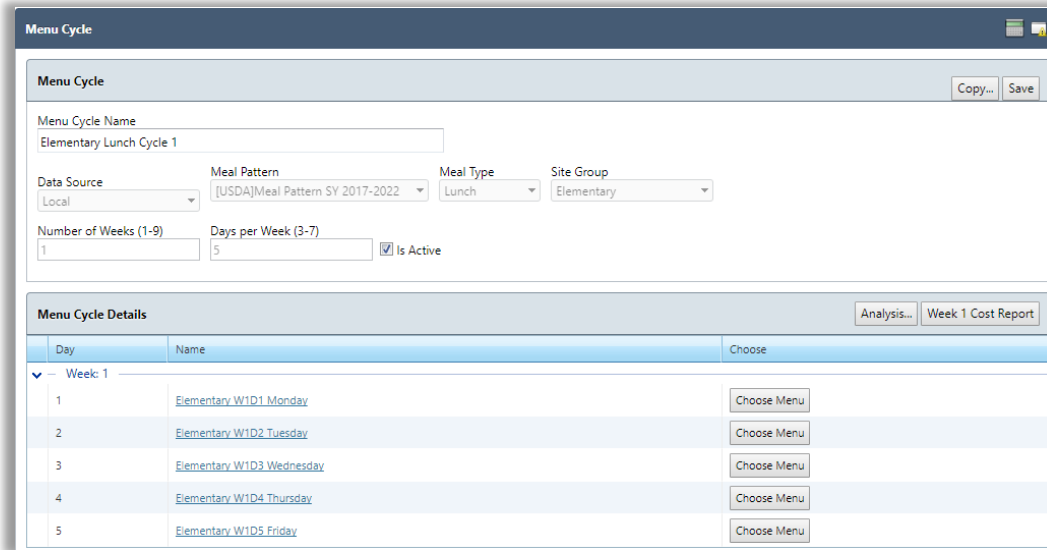


Figure 56 Menu Cycle

3.2.2.1 NUTRITIONAL ANALYSIS

Check the **Nutritional Analysis** for the **Menu Cycle** by completing the following steps.

1. Click on **Analysis**
2. A new pop up window will appear showing the **Nutritional Summary**
3. Choose any of the printable reports from the top of the window to show analyses that are more detailed

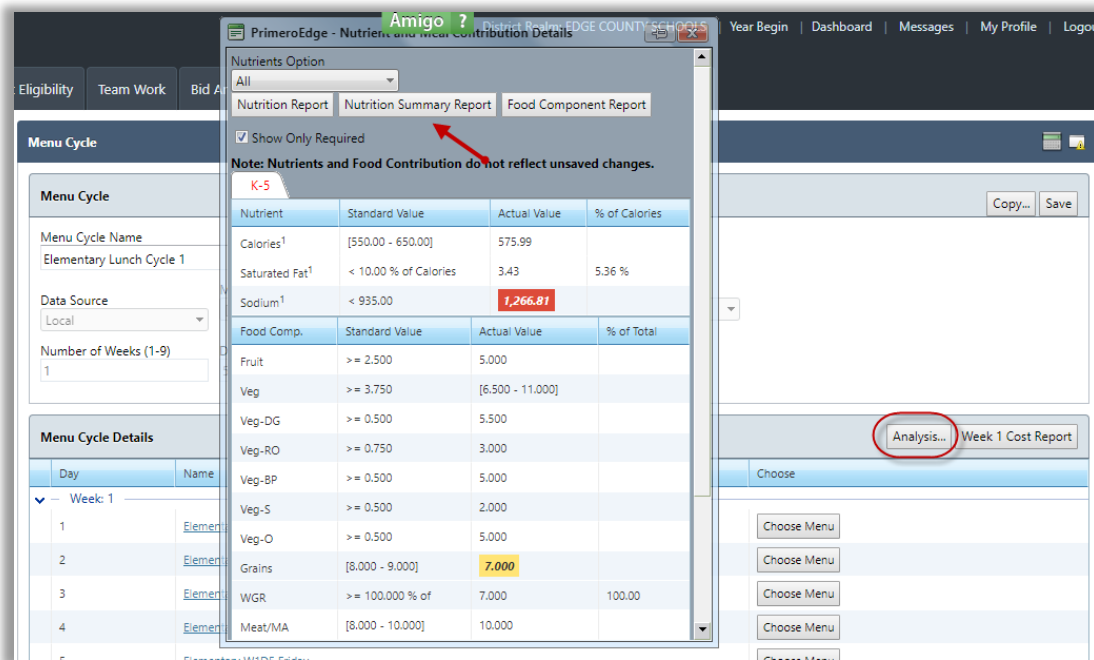


Figure 57 Menu Cycle Nutritional Analysis

3.2.2.2 COST REPORT

Review **costing information** for each week of the cycle by completing the following steps.

1. Click on **Week 1 Cost Report**
2. The **Costing Report** generates in separate window

Recipe Code	Description	Serving Size	Planned Qty	Unit Cost	Total Cost
Week: 1 (50 Meals)					
Day: 1 - Elementary W1D1 Monday (10 Meals)					
Menu Item Category: Entree					
TR1004	Black Bean Taco Salad	1 Salad	10	0.7729	7.73
Category Food Cost Per Meal:				0.77	
Menu Item Category: Fruit					
TR1011	Cantaloupe Cup	1 cup, cubes	5	0.5386	2.69
TR1007	Pears, Bartlett	1 ea.	5	0.1880	0.94
Category Food Cost Per Meal:				0.36	
Menu Item Category: Milk					
TR1006	Milk, Chocolate, nonfat	1 ea.	4	0.2550	1.02
TR1005	Milk, Strawberry, Nonfat	1 ea.	3	0.2550	0.77
TR1003	Milk, White, NonFat	1 ea.	3	0.2550	0.77
Category Food Cost Per Meal:				0.26	
Menu Item Category: Vegetable					
TR1010	Beans, Black	1/2 c.	5	0.0385	0.19
TR1008	Broccoli, Florets	1 Cup, Chopped	5	0.0000	0.00
TR1009	Cucumber Slices	1/2 cup, slices	5	0.0873	0.44
TR1000	Salsa, Low-sodium, Pouch	1 #30 scoop	5	0.0000	0.00
Category Food Cost Per Meal:				0.06	
Average / Total Meal Cost for Day 1:				1.45	14.54

Figure 58 Menu Cycle Costing Report

3.2.3 ASSIGN MENUS

Assign **Menu Cycles** to dates on a **Menu Calendar**. Create one **Menu Calendar** per month for a **Site Group, Site, Meal Type** and **Menu Line**.

▲ Assign Menus to a menu calendar in order for the menu to show up at the site level.

Assign a menu/menu cycle by completing the following steps.

1. Go to **Menu Planning > Menus > Assign Menus**
2. Select the appropriate **Meal Type, Site Group, Organization Level** and **Menu Line**

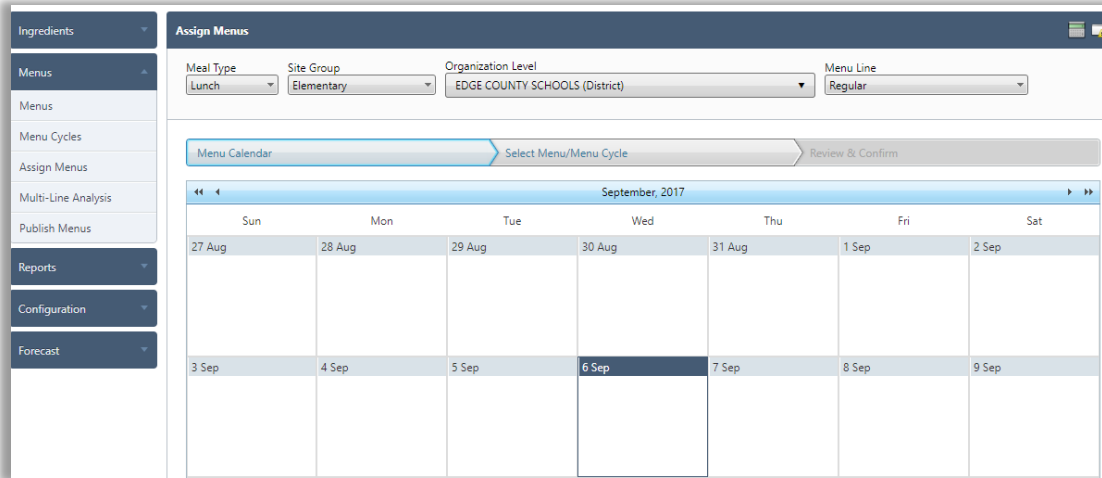


Figure 59 Assign Menus

3. Click on the date in which you would like begin the **Menu Cycle**
4. Ensure you are in the **correct date**
5. Select whether you will be assigning a single daily **Menu** or a **Menu Cycle**
6. Select the desired **Menu/Menu Cycle**
7. Click the **Next** button in the lower right corner

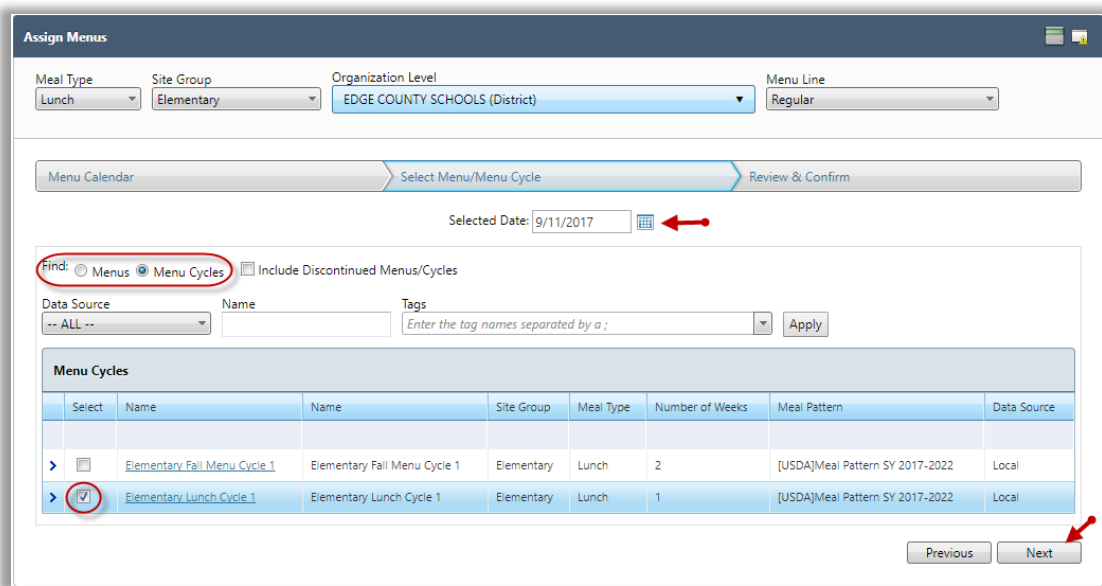


Figure 60 Select Menus/Menu Cycle

8. Review information then click **Assign**

Start Cycle on 9/11/2017

Menu Cycle: Elementary Lunch Cycle 1 Skip Holidays Skip Weekends Use All Menus

Serving Date	Day	Menu	Existing Menu
> 9/11/2017	Monday	Elementary W1D1 Monday	
> 9/12/2017	Tuesday	Elementary W1D2 Tuesday	
> 9/13/2017	Wednesday	Elementary W1D3 Wednesday	
> 9/14/2017	Thursday	Elementary W1D4 Thursday	
> 9/15/2017	Friday	Elementary W1D5 Friday	

Site Name	Site Group	Effective Date	End Date
SHADY GROVE ES	Elementary	6/1/2014	
EAGLE RIDGE ES	Elementary	6/1/2014	
PARK GLEN ES	Elementary	6/1/2014	
WOODLAND SPRINGS ES	Elementary	6/1/2014	
HIDDEN LAKES ES	Elementary	6/1/2014	
PRIMERO-HARVEL ES	Elementary	6/1/2014	
PARKVIEW ES	Elementary	6/1/2014	
WHITLEY ROAD ES	Elementary	6/1/2014	
LONE STAR ES	Elementary	6/1/2014	
HERITAGE ES	Elementary	6/1/2014	
NORTH RIVERSIDE ES	Elementary	6/1/2014	
CAPROCK ES	Elementary	6/1/2014	
EDENVIEW ES	Elementary	6/1/2014	

Previous

Figure 61 Review Menu Assignment

- Follow directions back to the **Menu Calendar**. You can delete a menu by clicking on the **Recycle Bin** icon in the top right corner of the menu. Re-assign a **Menu** by completing steps 3-8.

September, 2017

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27 Aug	28 Aug	29 Aug	30 Aug	31 Aug	1 Sep	2 Sep
3 Sep	4 Sep	5 Sep	6 Sep	7 Sep	8 Sep	9 Sep
10 Sep	11 Sep	12 Sep	13 Sep	14 Sep	15 Sep	16 Sep
	Elementary W1D1 Mon... Entree Black Bean Taco Sal... Fruit Cantaloupe Cup Pears, Bartlett Milk Milk, Chocolate, no... Milk, Strawberry, N...	Elementary W1D2 Tue... Entree Turkey Taco Salad Fruit Cantaloupe Cup Pears, Bartlett Milk Milk, Chocolate, no... Milk, Strawberry, N...	Elementary W1D3 Wed... Entree Spaghetti Casserole Fruit Cantaloupe Cup Pears, Bartlett Milk Milk, Chocolate, no... Milk, Strawberry, N...	Elementary W1D4 Thu... Entree Beef, Cheeseburger ... Fruit Cantaloupe Cup Pears, Bartlett Milk Milk, Chocolate, no... Milk, Strawberry, N...	Elementary W1D5 Fri... Entree Beef, Cheeseburger ... Fruit Cantaloupe Cup Pears, Bartlett Milk Milk, Chocolate, ... Milk, Strawberry, ...	

PrimerosEdge Response
 • Menu cycle assigned successfully

Figure 62 Delete Menu Assignment

3.2.4 MULTI-LINE ANALYSIS

This **Functional Area** contains tasks to create a **Nutrient Analysis** report to ensure meals are meeting all requirements for reimbursement.

1. Go to **Menu Planning > Menus > Multi-line Analysis**

The screenshot shows the 'Multi-Line Analysis' window with the following elements:

- Data Source:** A dropdown menu set to '-- ALL --'.
- Meal Pattern:** A dropdown menu set to '[USDA]Meal Pattern SY 2017-2022'.
- Meal Type:** A dropdown menu set to '-- SELECT --'.
- Site Group:** A dropdown menu set to '-- SELECT --'.
- Days in Week:** A dropdown menu set to '5'.
- Menu Cycle Name:** An empty text input field.
- Include Discontinued Menu Cycles:** An unchecked checkbox.
- Apply:** A button on the right side.
- Menu Cycles Available:** A table with columns 'Name' and 'Week to Add'. It contains the text 'No records to display.'
- Menu Cycles Added to Analysis:** A table with columns 'Name', 'Week Selected', and 'Delete'. It contains the text 'No records to display.'

Figure 63 Multi-line Analysis

2. Filter selections by **Data Source, Meal Pattern, Meal Type, Site Group, Days in Week, Menu Cycle Name** and **Include Discontinued Meal Cycles**, as needed
3. Click the **Apply** button on the right side of the **Multi-line Analysis** window

Multi-Line Analysis

Data Source
Local

Meal Pattern: [USDA]Meal Pattern SY 2017-2022 | Meal Type: Breakfast | Site Group: High School

Days in Week: 5 | Menu Cycle Name: | Include Discontinued Menu Cycles

Menu Cycles Available

Name	Week to Add	
17-18 Training Table (Football Boys)	1	<input type="button" value="Add"/>
High School Breakfast 17-18	1 ▼	<input type="button" value="Add"/>

Menu Cycles Added to Analysis

Name	Week Selected	Delete
No records to display.		

Figure 64 Menu Cycles Available

4. Click on a link under the name header in the **Menu Cycles Available** window
5. View the **Menu Cycle** and **Menu Cycle Details** windows

Menu Cycle
📅 ⚠️

Menu Cycle
Copy... Save

Menu Cycle Name

Data Source

Meal Pattern:
 Meal Type:
 Site Group:

Number of Weeks (1-9):
 Days per Week (3-7):
 Is Active

Menu Cycle Details
Analysis... Week 1 Cost Report All Weeks Cost Report

Day	Name	Choose
Week: 1		
1	16-17 k-5 Bkfst 1-1 Mini Pancakes :3386	Choose Menu
2	16-17 K-5 Bkfst 3-2 Sausage/biscuit :3386	Choose Menu
3	16-17 k-5 bkfst 1-3 Yoqurt/Cereal Bar :3386	Choose Menu
4	16-17 k-5 Bkfst 3-4 Pancake/stick :3386	Choose Menu
5	16-17 k-5 Bkfst 1-5 Mini Bagel :3386	Choose Menu

⏪ ⏴ 1 2 3 4 ⏵ ⏩

Figure 65 Menu Cycle and Menu Cycle Details

6. Click on a link under the **Week 1** column header to view the **Menu Info, Menu Item Categories and Serving Groups** and **Menu Items** for the selected meal items

Menu Info

[Add New Menu](#) [Go Back To Menu Cycle](#)

Menu: 16-17 k-5 Bkfst 1-1 Mini Pancakes :3386 Archive and Edit... Copy... Save

Data Source: Local Meal Pattern: [USDA]Meal Pattern SY 2017-2022 Meal Type: Breakfast Site Group: High School

Menu Description: 16-17 k-5 Bkfst 1-1 Mini Pancakes :3386 Projected Servings Count as a Percentage Is Active Analysis... Menu Costing Report... Show Calendar...

Tags: Copied from Menu/Template: 16-17 k-5 Bkfst 1-1 Mini Pancakes :3248 - archived on Sep 26 2017 3:18PM

Menu Item Categories: Bkfst Entree, Whole Grain, Fruit, Fruit Juice, Milk, Condiment, Meat/MA
Serving Groups: 9-12, Adult, Ala Carte

Menu Item Categories and Serving Groups

Include	Category	Choose (Min 1 Req.)	Include	Serving Group	Projected Meal Count (Min 1 Req.)
<input checked="" type="checkbox"/>	Bkfst Entree	1	<input type="checkbox"/>	PK	
<input type="checkbox"/>	ENTREES		<input type="checkbox"/>	K-5	
<input type="checkbox"/>	Grab N Go		<input type="checkbox"/>	K-8	
<input type="checkbox"/>	Lunch Entree		<input type="checkbox"/>	K-12	
<input type="checkbox"/>	Grains		<input type="checkbox"/>	6-8	
<input type="checkbox"/>	Vegetables		<input checked="" type="checkbox"/>	9-12	100
<input checked="" type="checkbox"/>	Whole Grain	2	<input checked="" type="checkbox"/>	Adult	1

Menu Items View Standard Menu Items... Add Standard Menu Items Add Menu Items...

Menu Item	Meal Contribution	9-12 (100)	Adult (1)	Ala Carte (1)
Category: Bkfst Entree: Choose: 1				
Breakfast_Pancakes_Mini_Strawberry_Splash_72/3.53oz	2 WGR	90% (90) 1 pouch	% (0) 1 pouch	% (0) 1 pouch
Category Totals:		90% (90)	0% (0)	0% (0)

Figure 66 Menu Info

3.2.5 PUBLISH MENUS

This **Functional Area** contains tasks for managing **Publishing Menus**.

1. Go to **Menu Planning > Menus > Publish Menus**

Publish Menus

Start Date: Number of Days:

Figure 67 Publish Menus

2. Filter selections by **Start Date** and **Number of Days**
3. Click on the **Get Menus** button in the lower left corner of the window

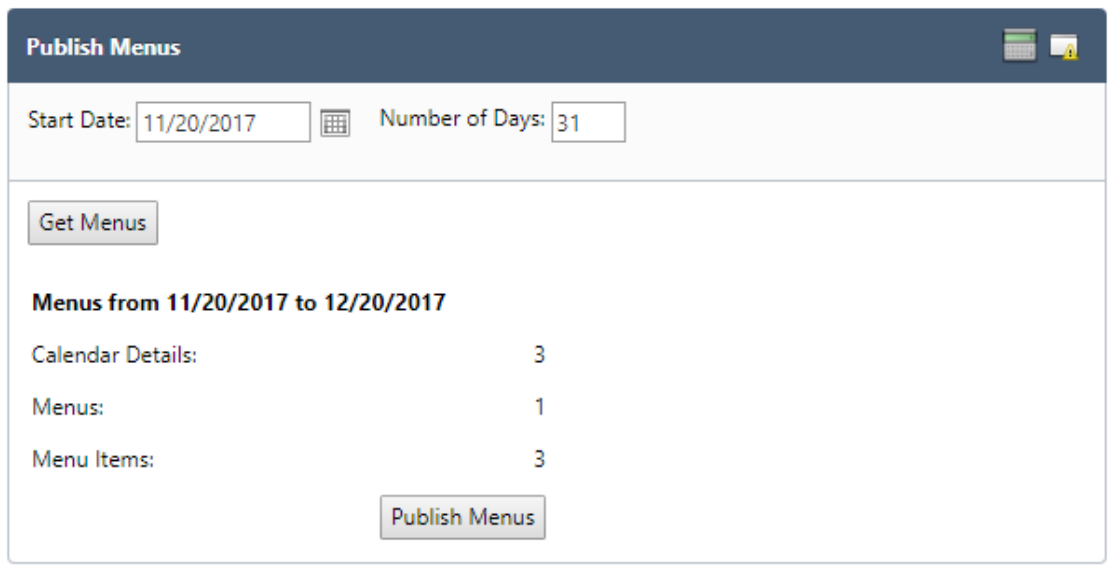


Figure 68 List for Publish Menus

4. Click on the **Publish Menus** button at the bottom of the window
5. View the **Publish Menus** success note at the top of the window

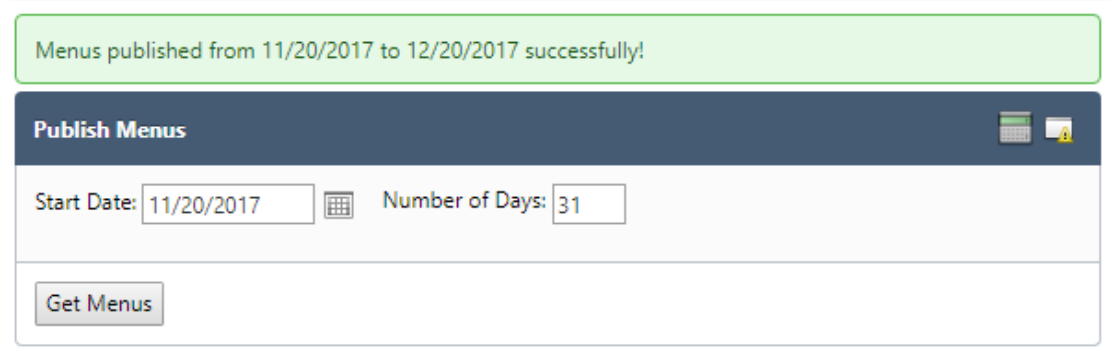


Figure 69 Publish Menus Success Note

3.3 REPORTS

This **Category** contains tasks for managing **Reports**. PrimeroEdge generates many reports related to **Menu Planning**. The reports you see depend upon your organization and your role. You can print, save, import and export reports in a wide variety of formats that include XML, CVS, PDF, MHTL, TIFF, Microsoft™ Excel or Word.

3.3.1 ACCEPTABILITY FACTOR

The **Acceptability Factor** or Popularity Index provides valuable information for nutritionists. The formula relies on the number of portions served and the total number of patrons. Generate an **Acceptability Factor** report with the following steps.

1. Go to **Menu Planning > Reports > Acceptability Report**
2. Select a **Start Date** and an **End Date**

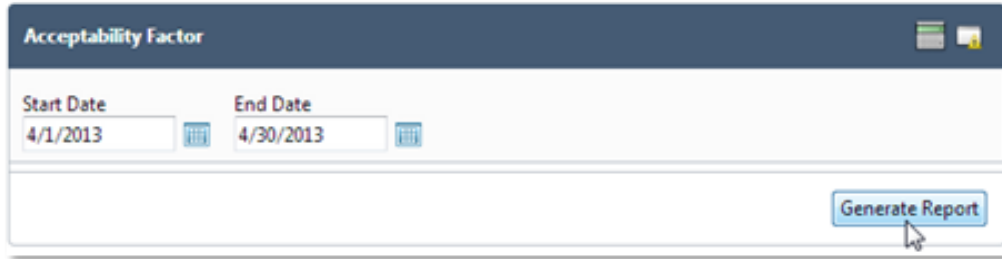


Figure 70 Acceptability Factor Generate Report Screen

3. Click the button marked **Generate Report**

Generated on: 7/19/2013 11:35:47 AM

Acceptability Factor From: 4/1/2013 To: 4/30/2013

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-024	1	5 (2 CN-Piece)	4	125.00
Extra	Apple Honey Crisp C-024	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/cool	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/cool	1	100 (1 c.)	99	101.01
Site Group: Elementary School; Meal Service: Lunch; Serving Date: 04/10/2013; Line: Regular					
SC - Fruit	Applesauce, mixed berry, 72/4 oz cup; as	1	0 (4 oz.)	610	0.00

Figure 71 Acceptability Factor Report

3.3.2 ADDED INGREDIENTS/RECIPES

Generate an **Added Ingredients/ Recipes** report with the following steps.

1. Go to **Menu Planning > Reports > Added Ingredients/Recipes**

Figure 72 Add Ingredients/Recipes Generate Reports

2. Select a **Start Date** and an **End Date**
3. Select **Ingredients** or **Recipes** as needed
4. Click **Apply**

Data Source	Ingredient Code	Ingredient Name	Manufacturer	Added By	Added On
Child Nutrition Database	35193	Agave, cooked (Southwest)		Cybersoft Support	Feb 6 2016 12:00AM
Child Nutrition Database	35194	Agave, dried (Southwest)		Cybersoft Support	Feb 6 2016 12:00AM
Child Nutrition Database	35192	Agave, raw (Southwest)		Cybersoft Support	Feb 6 2016 12:00AM
Child Nutrition Database	14007	Alcoholic beverage, beer, light, BUD LIGHT	Anheuser-Busch, Inc.	Cybersoft Support	Feb 6 2016 12:00AM
Child Nutrition Database	14005	Alcoholic beverage, beer, light, BUDWEISER SELECT	Anheuser-Busch, Inc.	Cybersoft Support	Feb 6 2016 12:00AM
Child Nutrition Database	14248	Alcoholic beverage, beer, light, higher alcohol		Cybersoft Support	Feb 6 2016 12:00AM
Child Nutrition Database	14013	Alcoholic beverage, beer, light, low carb	Anheuser-Busch, Inc.	Cybersoft Support	Feb 6 2016 12:00AM
Child Nutrition Database	14004	Alcoholic beverage, beer, regular, BUDWEISER	Anheuser-Busch, Inc.	Cybersoft Support	Feb 6 2016 12:00AM
Child Nutrition Database	14239	Alcoholic beverage, malt beer, hard lemonade		Cybersoft Support	Feb 6 2016 12:00AM
Child Nutrition Database	14019	Alcoholic beverage, tequila sunrise, canned		Cybersoft Support	Feb 6 2016 12:00AM

Figure 73 Add Ingredient/Recipes Report

5. Click on the **Export to Excel** button in the upper right corner of the **Ingredients List** window.

3.3.3 ALLERGEN CHART

The **Allergen Chart** shows which **Menu Items** contain which allergens. From the **Allergen Chart**, the user will be able to see if a **Menu Item** contains (C) an allergen, is processed in a facility that also process (P) an allergen, or may contain (MC) an allergen. Generate an **Allergen Chart** with the following steps.

1. Go to **Menu Planning > Reports > Allergen Chart**
2. Filter selections by **All Active Menu Items, Menu Items on Active Menus or Menu items on Menus for a timeframe**

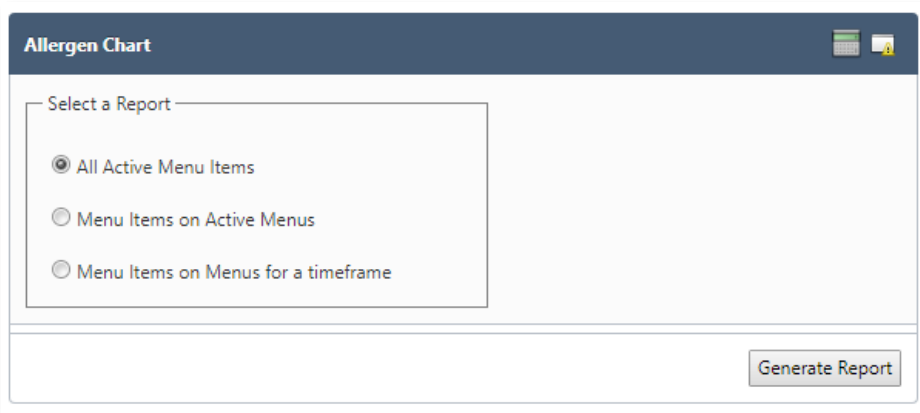


Figure 74 Allergen Chart Generate Report Screen

3. Click the **Generate Report** button in the lower right corner of the Allergen Chart window

Allergen Chart										
Generated on: 8/29/2017 7:39:50 AM by Cybersoft Support										
Entrees										
Menu Item	Crustacean Shellfish	Egg	Fish	Gluten	Milk	Peanuts	Soy	Tree nuts	Wheat	
Barbecued Chicken - USDA Recipe D110 - PER D-110										
Bean Burrito Bowl - USDA Recipe D120A - PER D-120A										
Bean Tostada - USDA Recipe D120C - PER D-120C										
Beef and Bean Tamale Pie - USDA Recipe D150A - PER D-150A										
Beef or Pork Burrito (Canned Meats) - USDA Recipe D120B - PER D-120B										
Beef or Pork Burrito - USDA Recipe D120 - PER D-120										
Beef Stew - USDA Recipe D140 - PER D-140										
Beef Tamale Pie - USDA Recipe D150 - PER D-150										
Cheeseburger Sliders - TR1012				C	C		C		C	
Black Bean Taco Salad - TR1004					C					
Bok Choy Wraps - PER1001										
Breakfast Taco - TR1020					C					
Central Valley Harvest Bake - PER1006										
Chic' Penne - PER1031										
Chicken Alfredo With a Twist - PER1027				C					C	

Figure 75 Allergen Chart

3.3.4 ALLERGEN REPORT

The **Allergen Report** shows allergens listed for a Menu Item. Generate an **Allergen Report** with the following steps.

1. Go to **Menu Planning > Reports > Allergen Report**
2. Filter selections by **Menu Items, Standard Allergens** and **Custom Allergens**
3. Click the **Generate Report** button in the lower right corner

Allergen Report

Data Source
-- ALL --

Menu Items

All Active Menu Items
 Menu Items on Active Menus
 Menu Items on Assigned Menus

Standard Allergens Select All

Candy Cookies Crustacean Shellfish Egg Fish Gluten Milk Ofe Peanuts Soy
 Strawberry Tree nuts Uche Utara Wheat

Custom Allergens Select All

Avocado

Generate Report

Figure 76 Allergen Report Generate Report Screen

Generated on: 8/29/2017 8:01:05 AM by Cybersoft Support
Report Option: All Active Menu Items

Data Source	Recipe Code	Menu Item	Allergen(s)
Local	TR1004	Black Bean Taco Salad	Contains Milk.
Local	TR1020	Breakfast Taco	Contains Milk.
Local	TR1012	Cheeseburger Sliders	Contains Gluten, Milk, Soy, Wheat.
Cybersoft	PER1027	Chicken Alfredo With a Twist	Contains Gluten, Wheat.
Cybersoft	PER1017	Fiesta Wrap	Contains Wheat.
Local	TR1013	French Fries, Cross Trax	Contains Gluten, Peanuts.
Local	TR1006	Milk, Chocolate, nonfat	Contains Milk.
Local	TR1005	Milk, Strawberry, Nonfat	Contains Milk.
Local	TR1003	Milk, White, NonFat	Contains Milk.
Cybersoft	PER1032	Porcupine Sliders	Contains Soy, Wheat.
Local	TR1014	Roll, Hoagie, 51 % Whole Wheat	Contains Gluten, Wheat.
Local	TR1002	Spaghetti Casserole	Contains Egg, Milk, Wheat.
Local	TR1001	Turkey Taco Salad	Contains Milk.

Report Selections:
Data Source: All
Standard Allergens: All

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Figure 77 Allergen Report

3.3.5 INGREDIENT LIST

The **Ingredient List** Report lists each ingredient with all of its information. Locate each **Ingredient** on a separate page. Generate an **Ingredient List** with the following steps.

1. Go to **Menu Planning > Reports > Ingredient List**
2. Filter selections by **Tag(s)**, **Form** and **Data Source**
3. Click the **Generate Report** button in the lower right corner

Ingredient List

Tag(s) Form

Data Source

Figure 78 Ingredient List Generate Report Screen

Ingredient List Report
 Ingredient Name: Beef, Ground Cooked
 Ingredient Code: LI100001
 Generated on: 8/29/2017 8:20:40 AM by Cybersoft Support

Measure	Weight In Grams
1 Ounce (L V1) (L v1)	28.3500

Nutrients per 100 g

Calories (Kcal)	Fat (g)	Sfat (g)	TFat (g)	Chol (mg)	Na (mg)	Carb (g)	TDF (g)	Sugars (g)	Pro (g)	Fe (mg)	Ca (mg)	A.IU	VitC (mg)	Mois (g)	Ash (g)
239.859	14.356	5.644	1.164	84.636	77.601	0.000	0.000	0.000	25.961	0.000	0.000	0.000	0.000	(M)	(M)

Nutrients per 1 Ounce (L V1) (28.350 g)

Calories (Kcal)	Fat (g)	Sfat (g)	TFat (g)	Chol (mg)	Na (mg)	Carb (g)	TDF (g)	Sugars (g)	Pro (g)	Fe (mg)	Ca (mg)	A.IU	VitC (mg)	Mois (g)	Ash (g)
68.000	4.070	1.600	0.330	24.000	22.000	0.000	0.000	0.000	7.360	0.000	0.000	0.000	0.000	(M)	(M)

(M) Indicates missing nutrient values.
 1 Trans Fat is provided for informational purposes, not for monitoring purposes.
 Powered by PrimeroEdge for: EDGE COUNTY SCHOOLS
 Page: 1 of 24

Figure 79 Ingredient List Report

3.3.6 LOCALLY GROWN USAGE

This **Functional Area** contains tasks for creating a **Locally Grown Usage Report** that shows locally grown product usage.

1. Go to **Menu Planning > Reports > Locally Grown Usage**
2. **Filter selections by Organizational Level, From/To Dates and Group By (District, Area or Site)**
3. Click the **Export to Excel** and/or **Generate Report** buttons in the lower right corner, as needed

Locally Grown Usage

Organization Level
 Edge County Schools (District)

From Date
 10/20/2017

To Date
 11/20/2017

Group By
 District Area Site

Export to Excel Generate Report

Figure 80 Locally Grown Usage

3.3.7 MENU CALENDAR

Menu Calendar Report shows nutrient information for each menu item by its menu calendar assignment date. Generate a **Menu Calendar** Report by completing the following steps.

1. Go to **Menu Planning > Reports > Menu Calendar**
2. Filter selections by **Meal Type, Site Group, Site, Menu Line, Print by (Calendar Month, Week or Day), Menu Calendar Report (Show Summary by Items Only and/or Include Nutrients)** and/or **Menu Calendar Nutrients (Serving Group and/or Nutrients Option)**
3. Click the **Generate Report** button in the lower right corner

Figure 81 Menu Calendar Information

4. View the **Menu Calendar Nutrient Analysis Report – September, 2017**

Menu Calendar Nutrient Analysis Report - September, 2017 Generated on: 9/6/2017 11:05:28 AM by Cy

Site: ALL
Date: 09/01/2017 - 09/30/2017

Item Name (Serving Size)	Planned Qty	Calories (Kcal)	Fat (g)	Sfat (g)	TFat (g)	Chol (mg)	Na (mg)	Carb (g)	TDF (g)	Sugars (g)	Pro (g)	Fe (mg)	Ca (mg)	A.IU	VitC (mg)	Mois (g)	Ash (g)
Elementary W1D1																	
Monday -																	
Serving Date: 09/11/2017																	
Black Bean Taco Salad - TR1004 (1 Salad)	10	308.05	8.57	1.68	0.00(M)	3.75	903.37	50.41	10.67	0.25(M)	13.36	4.39	230.72	6953.01	38.74	179.26(M)	0.99(M)
Cantaloupe Cup - TR1011 (1 cup, cubes)	5	68.00	0.38	0.10	(M)	0.00	32.00	16.32	1.80	(M)	1.68	0.42	18.00	6764.00	73.40	180.30	1.30
Pete's Pears - TR1007 (1 ea.)	5	86.00	0.00	0.00	0.00	0.00	1.00	23.00	5.00	15.00	1.00	0.18	10.00	50.00	6.00	(M)	(M)
Chocolate Milk - TR1006 (1 ea.)	4	120.00	0.00	0.00	0.00	5.00	150.00	22.00	0.00	20.00	8.00	0.00	300.00	500.00	1.80	(M)	(M)
Milk, Strawberry, Nonfat - TR1005 (1 ea.)	3	130.00	0.00	0.00	0.00	5.00	130.00	24.00	0.00	22.00	8.00	0.00	300.00	500.00	2.40	(M)	(M)
Milk, White, NonFat - TR1003 (1 ea.)	3	90.00	0.00	0.00	0.00	5.00	130.00	13.00	0.00	12.00	8.00	0.00	300.00	500.00	0.00	90.84	0.00
Beans, Black - TR1010 (1/2 c.)	5	115.00	0.00	0.00	(M)	0.00	413.75	20.00	6.25	(M)	7.50	2.75	60.00	8.75	3.13	(M)	(M)
Broccoli, Florets - TR1008 (1 Cup, Chopp)	5	31.00	0.00	0.00	0.00	0.00	30.00	6.00	2.00	2.00	3.00	0.72	40.00	550.00	81.00	(M)	(M)
Cucumber Slices - TR1009 (1/2 cup, slice)	5	8.00	0.00	0.00	0.00	0.00	1.00	2.00	0.00	1.00	0.00	0.18	10.00	50.00	1.20	(M)	(M)
Salsa, Low-sodium, Pouch - TR1000 (1 #30 scoop)	5	10.06	0.06	0.01	0.00	0.00	32.01	1.99	0.41	2.00	0.43	0.64	3.20	155.93	1.14	(M)	(M)
Elementary W1D2																	
Tuesday -																	
Serving Date: 09/12/2017																	
Turkey Taco Salad - TR1001 (1 Salad)	10	243.46	9.67	2.33	0.00	7.50	1828.63	44.68	5.01	2.50(M)	8.33	3.45	362.35	2663.51	34.62	232.70(M)	1.09(M)
Cantaloupe Cup - TR1011 (1 cup, cubes)	5	68.00	0.38	0.10	(M)	0.00	32.00	16.32	1.80	(M)	1.68	0.42	18.00	6764.00	73.40	180.30	1.30
Pete's Pears - TR1007 (1 ea.)	5	86.00	0.00	0.00	0.00	0.00	1.00	23.00	5.00	15.00	1.00	0.18	10.00	50.00	6.00	(M)	(M)
Chocolate Milk - TR1006 (1 ea.)	4	120.00	0.00	0.00	0.00	5.00	150.00	22.00	0.00	20.00	8.00	0.00	300.00	500.00	1.80	(M)	(M)
Milk, Strawberry, Nonfat - TR1005 (1 ea.)	3	130.00	0.00	0.00	0.00	5.00	130.00	24.00	0.00	22.00	8.00	0.00	300.00	500.00	2.40	(M)	(M)

Figure 82 Menu Calendar Report

3.3.8 MENU ITEM NUTRIENTS

Menu Item Nutrients Report allows you to choose one or more nutrients to view for all menu items. For example, this report may be helpful for students with diabetes who need to monitor carbohydrate intake carefully.

1. Go to **Menu Planning > Reports > Menu Item Nutrients**
2. Filter selections by **Data Source, Meal Pattern, Serving Group** and **Nutrients**
3. Click the **Generate Report** button in the lower right corner

Figure 83 Menu Item Nutrients Generate Report Screen

Item Name (Serving Size)	Carb (g)
Aztec Grain Salad - PER1029 (1 c.)	52.02
Baking Powder Biscuits - USDA Recipe B40 - PER B-40 (1 BISCUIT)	26.75
Baking Powder Biscuits B-04 - PER B-04 (1 BISCUIT)	22.09
Banana Bread Squares - USDA Recipe B50 - PER B-50 (1 piece)	27.82
Barbecued Chicken - USDA Recipe D110 - PER D-110 (1 portion)	16.58

Figure 84 Menu Item Nutrient Report

3.3.9 NUTRIENT STANDARDS

Nutrient Standards Report gives an overview of the USDA guidelines of nutrient standards for each meal pattern. Generate a **Nutrient Standards** Report by completing the following steps.

1. Go to **Menu Planning > Reports > Nutrient Standards**
2. Select the **Meal Pattern** and **Meal Type**
3. Click the **Generate Report** button in the lower right corner

Figure 85 Nutrient Standards Generate Report Screen

4. View the **Nutrient Standards Report**

Nutrient Standards		
Serving Group	Nutrient Name	USDA Standard
PK		
	Calories	≥ 517.000
	Saturated Fat	< 10.000% calories
	Total Fat	≤ 30.000% calories
	Protein	≥ 7.000
	Iron	≥ 3.300
	Calcium	≥ 267.000
	Vitamin A (IU)	≥ 750.000
	Vitamin C	≥ 14.000
K-5		
	Calories	[550.000 - 650.000]
	Saturated Fat	< 10.000% calories
	Sodium	< 935.000
K-8		
	Calories	[600.000 - 650.000]
	Saturated Fat	< 10.000% calories
	Sodium	< 935.000
6-8		
	Calories	[600.000 - 700.000]
	Saturated Fat	< 10.000% calories
	Sodium	< 1035.000

Figure 86 Nutrients Standards Report

3.3.10 POST-PRODUCTION ANALYSIS

Post Production Analysis will give you nutritional analysis based on the actual numbers from the production records.

▲ You must have at least three days of data or you will get a red message letting you know that you cannot run the report.

1. Go to **Menu Planning > Reports > Post Production Analysis**
2. Filter selections by **Meal Type, Site Group, Site, Menu Line** and **Start/End Dates**
3. Click **Generate** then wait for the **Analysis** button to become available to select

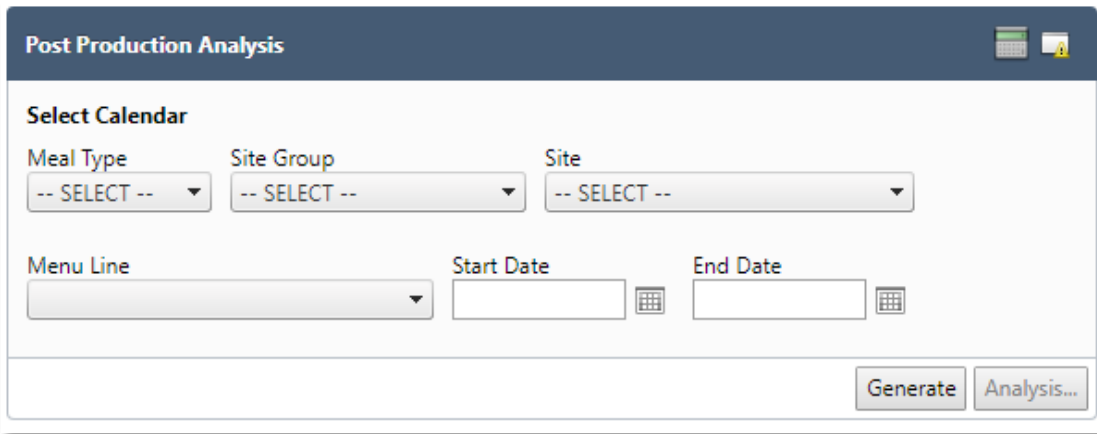


Figure 87 Post-production Analysis Generate Report Screen

4. A new pop up window will appear showing **Post Production Analysis**. Select printable versions of reports at the top of the window.

Nutrient	Standard Value	Actual Value	% of Calories
Food Energy ¹	[550.00 - 650.00]	579.33(M)	
Saturated Fat ¹	< 10.00 % of Calories	7.25(M)	11.27 %
Sodium ¹	< 1,230.00	1,025.15(M)	
Food Comp.	Standard Value	Actual Value	% of Total
Fruit	>= 2.500	[2.500 - 3.000]	
Veg	>= 3.750	[3.500 - 8.125]	
Veg-DG	>= 0.500	4.500	
Veg-RO	>= 0.750	2.250	
Veg-BP	>= 0.500	1.000	
Veg-S	>= 0.500	2.000	
Veg-O	>= 0.500	1.125	
Grains ^a	[8.000 - 9.000]	[9.250 - 19.750]	
WGR	>= 100.000 % of	45.750	100.00
Meat/MA	[8.000 - 10.000]	[7.500 - 11.500]	

Figure 88 Post-production Analysis

3.3.11 RECIPE BOOK

Recipe Book provides all recipes by **Data Source** into printable versions. Generate a **Recipe Book** by completing the following steps.

1. Go to **Menu Planning > Reports > Recipe Book**



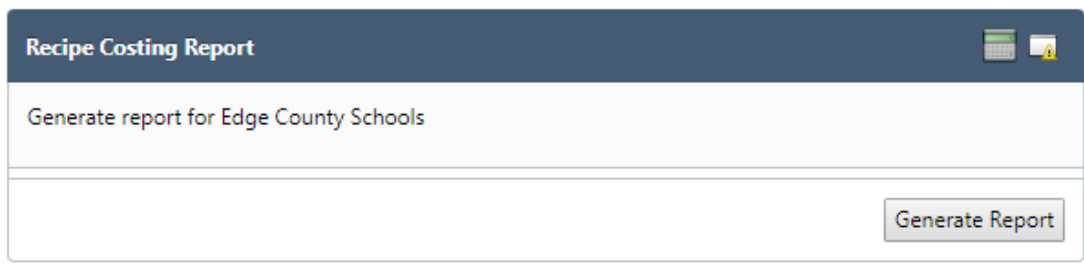
Figure 89 Recipe Book

2. Select the appropriate **Data Source** from the dropdown menu
3. Click the **Generate Report** button in the lower right corner
4. Each recipe will generate on a separate page

3.3.12 RECIPE COSTING REPORT

Recipe Costing Report shows the recipe materials cost and cost per serving for all recipes. Generate a **Recipe Costing Report** by completing the following steps.

1. Go to **Menu Planning > Reports > Recipe Costing Report**



5. Click the **Generate Report** button in the lower right corner
6. View the **Recipe Costing Report**

1 of 8 Find | Next

Generated on: 11/20/2017 1:06:09 PM by Cybersoft Support

Recipe Costing Report

Recipe	Recipe Name	Serving Size	Recipe Material Cost (\$)	Number Of Servings	Cost Per Serving (\$)
BADCCP	Recipe with BAD HACCP CCP	1 serv.	28.61	26.00	1.10
CCP-R1	RECIPe CCP testing	1 serv.	28.61	26.00	1.10
copy-lr1196	Test Recipe in Harrison county	1/4 c.	10.98	140.00	0.08
DR-RC1	Dual entyr recipe for testing recipe cost	1 c.	25.91	50.00	0.52
DR-RC3	Dual recipe with only purchase items not linked to any S.I and a state ingredient	1 c.	2.00	50.00	0.04
Harrison-R1	Testing recipe cost report-in harrison county schools	1 c.	26.99	55.55	0.49
Harrison-R2	New recipe for testing the district recipe costing report	1 c.	65.82	50.00	1.32
LR-1004	(SBCP-5210)-Biscuit (GB-362)	1 ea.	37.05	82.00	0.45
LR-1005	Scrambled Eggs (MD-411)	1/4 c.	15.08	80.00	0.19
LR-1006	Cinnamon Roll (GB-482)	1 ea.	5.83	72.00	0.08
LR-1007	Grits (GB-544)	1/2 c.	0.02	40.00	0.00
LR-1008	Oatmeal (GB-323)	1 c.	4.26	24.00	0.18
LR-1009	Lasagna (MD-415)	1 pieces	26.51	72.00	0.37
LR-1010	Pizza, Cheese (Elementary) (MD-7)	1 ea.	4.84	10.00	0.48
LR-1011	Pizza, Pepperoni (Elem) (MD-8)	1 ea.	5.12	10.00	0.51
LR-1012	Corn, Whole Kernel	1/4 c.	4.45	39.00	0.11
LR-1013	Peas (FV-464)	1/4 c.	10.29	70.00	0.15
LR-1014	Mashed Potatoes (FV-383)	1/2 c.	5.47	105.00	0.05
LR-1014Copy	Copy of Mashed Potatoes (FV-383)	1/2 c.	5.42	105.00	0.05
LR-1015	Gravy (1 oz) (SD-521)	1 fl. oz.	1.78	128.00	0.01
LR-1016	Carrot Sticks	1 1/4 oz.	1.05	77.00	0.01
LR-1017	Pineapple Tidbits	1/2 c.	4.61	25.00	0.18
LR-1018	DO NOT CHANGE-Oven Roasted Crinkles (FV-352)	3 oz.	3.25	26.00	0.12
LR-1019	Applesauce	1/2 c.	4.15	23.00	0.18
LR-1020	Hot Dog on a Bun WG	1 ea.	8.63	25.00	0.35
LR-1021	Peaches, Sliced	1/2 c.	4.51	24.00	0.19
LR-1022	Broccoli (FV-459)	1/4 c.	3.62	47.00	0.08

Figure 90 Recipe Costing Report

3.3.13 RECIPE MATERIALS REPORT

Recipe Materials Report shows quantities needed of each ingredient in a recipe and how much each serving costs. Generate a **Recipe Materials Report** by completing the following steps.

1. Go to **Menu Planning > Reports > Recipe Materials Report**

Recipe Materials Report

Data Source
Local

Generate Report Export To Excel

2. Select appropriate **Data Source** from the dropdown menu

3. Click the **Generate Report** or **Export to Excel** button if a spreadsheet is preferred

Recipe Materials Report								Generated on: 9/6/2017 1:24:52 PM by Cybersoft Support	
Item # / Recipe Code	Item Description	Primary Measure	Secondary Measure	Broken Unit Size	Broken Units Per Case	Broken Units Needed	Cost		
Recipe: TR1000 - Salsa, Low-sodium, Pouch; Servings: 1.000 (1 no. 30 scoop)									
FF103	SALSA, POUCH 6/106OZ PER CASE	1.000 no. 30 scoop		106.000 Ounce	6	0.0000	0.00		
Recipe Cost:								0.00	
Recipe: TR1001 - Turkey Taco Salad; Servings: 1.000 (1 Salad)									
PP102	LETTUCE-ROMAINE(CHOPPED) 2LB. BAGS	1.000 Ounce		2.000 Pound	1	0.0313	0.11		
SS102	CHEESE, SHREDDED AMERICAN RED. FAT 4/5LB \$24.90 VPT	0.500 Ounce		16.000 Ounce	20	0.0313	0.08		
SS104	NACHO CHIP, MINI ROUND 120/1 OZ	1.000 Bag		1.000 Bag	120	1.0000	0.19		
PP103	ONIONS RED 5# NOT FIRM PRICING	0.125 Pound		16.000 Ounce	5	0.1250	0.08		
PP105	TOMATOES 5# NO FIRM PRICING	3.000 Ounce		16.000 Ounce	5	0.1875	0.23		
FF102	JALAPENOS, SLICED 6/#10	1.000 Ounce		102.000 Ounce	6	0.0098	0.03		
FF103	SALSA, POUCH 6/106OZ PER CASE	1.000 Ounce		106.000 Ounce	6	0.0094	0.03		
Recipe Cost:								0.74	

Figure 53 Recipe Materials Report

3.3.14 RECIPE NUTRITION

Recipe Nutrition provides nutrient information for each recipe.

1. Go to **Menu Planning > Reports > Recipe Nutrition**

Recipe Nutrition

Tag(s)

Data Source

Figure 91 Recipe Nutrition

2. Select appropriate **Data Source**
3. Click the **Generate Report** button in the lower right corner
4. Each recipe will generate on a separate page

Recipe Nutrition Report for Beans, Black (Recipe Code: TR1010). Generated on: 9/6/2017 1:26:24 PM by Cybersoft Support.

Recipe Name: Beans, Black
 Recipe Code: TR1010
 Tag(s): Legumes
 Number of Servings: 1,000 Serving Size: 1/2 Cup
 Moisture gain/loss%: 0.000 Fat gain/loss%: 0.000
 Waste gain/loss%: 0.000

Ingredient Name	Weight (g)	Calories (Kcal)	Fat (g)	Sfat (g)	TFat (g) (1)	Chol (mg)	Na (mg)	Carb (g)	TDF (g)	Sugars (g)	Pro (g)	Fe (mg)	Ca (mg)	A.IU	VitC (mg)	Mois (g)	Ash (g)
Beans, Black	125.000	115	0	0	(M)	0	413.75	20	6.25	(M)	7.5	2.75	60	8.75	3.125	(M)	(M)
Sub Total	125.000	115	0	0	(M)	0	413.75	20	6.25	(M)	7.5	2.75	60	8.75	3.125	(M)	(M)
Fat/Waste/Moist Change	0.000	(M)	(M)	(M)	(M)	(M)	(M)	(M)	(M)	(M)	(M)	(M)	(M)	(M)	(M)	(M)	(M)
Total	125.000	115	0	0	(M)	0	413.75	20	6.25	(M)	7.5	2.75	60	8.75	3.125	(M)	(M)
Per 100g	100.000	92	0	0	(M)	0	331	16	5	(M)	6	2.2	48	7	2.5	(M)	(M)
Per Serving	125.000	115	0	0	(M)	0	413.75	20	6.25	(M)	7.5	2.75	60	8.75	3.125	(M)	(M)

(M) Indicates missing nutrient values.
 1 Trans Fat is provided for informational purposes, not for monitoring purposes.
 Powered by PrimeroEdge for: EDGE COUNTY SCHOOLS

Figure 54 Recipe Nutrition Report

3.3.15 USAGE REPORTS

This **Functional Area** contains tasks for managing **Usage Reports**.

1. Go to **Menu Planning > Reports > Usage Reports**
2. Filter selections by **Data Source, Ingredient, Recipe, Menu Item, Ingredient Code, Ingredient Name, Manufacturer/Brand, Product Code** and/or **Assigned Menus**
3. Click the **Apply** button in the lower half of the **Usage Reports** window

The screenshot shows the 'Usage Reports' window with the following elements:

- Data Source:** A dropdown menu currently set to '-- ALL --'.
- Filter Type:** Three radio buttons: 'Ingredient' (selected), 'Recipe', and 'Menu Item'.
- Ingredient Code:** An empty text input field.
- Ingredient Name:** An empty text input field.
- Manufacturer/Brand:** An empty text input field.
- Product Code:** An empty text input field.
- Assigned Menus:** A section containing a checkbox labeled 'Only show results if used on an Assigned Menu' (which is currently unchecked) and an 'Apply' button.

Figure 92 Usage Reports

4. View the **Ingredients List** of the **Usage Reports**

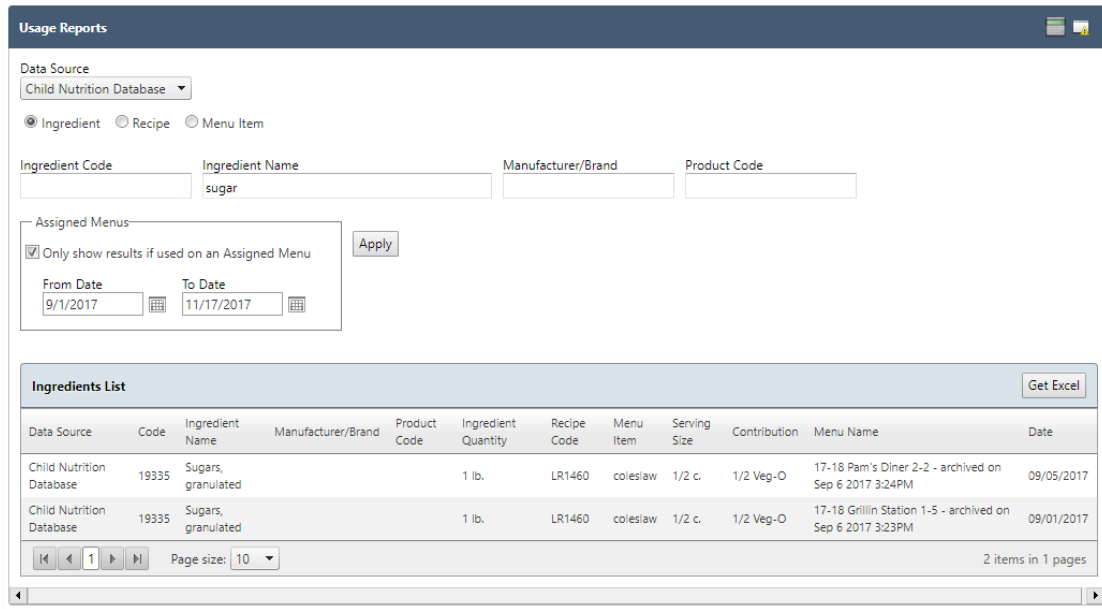


Figure 93 Usage Report Ingredients List

5. Click on the **Get Excel** button in the upper right corner of the **Ingredients List** window to export/download an Excel file of the report

3.3.16 WEEKLY NUTRIENT ANALYSIS

Weekly Nutrient Analysis allows you to view the nutrient analysis for any week for an assigned menu/menu cycle. Generate **Weekly Nutrient Analysis** by completing the following steps.

1. Go to **Menu Planning > Reports > Weekly Nutrient Analysis**
2. Filter selections by **Meal Type, Site Group, Site, Menu Line** and/or **Start/End Dates**
3. Click **Generate** then wait for **Analysis** button to become available to select

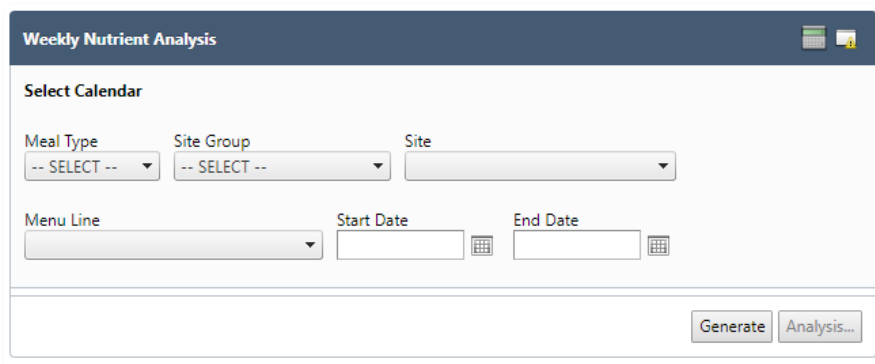


Figure 55 Weekly Nutrient Analysis Generate Report Screen

4. A new pop up window will appear showing **Weekly Nutrient Analysis**. Select printable versions of reports at the top of the window

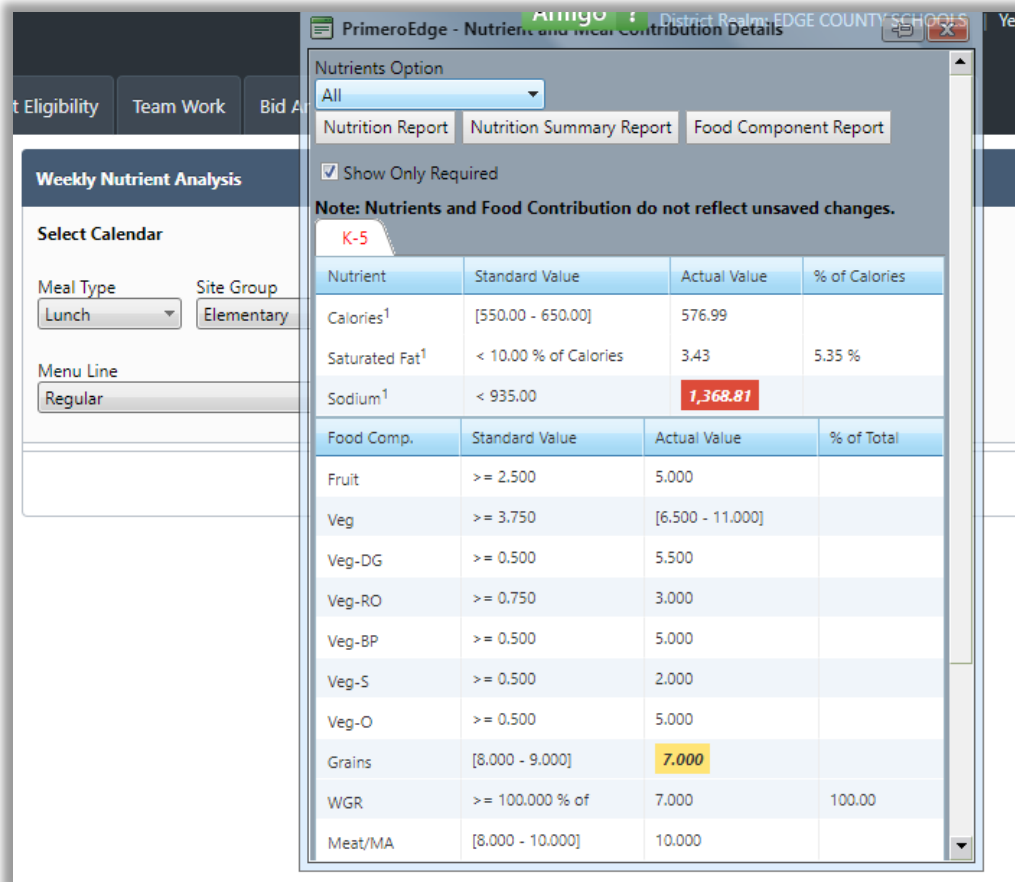


Figure 56 Weekly Nutrient Analysis

3.3.17 PRE-PRODUCTION ANALYSIS

This **Functional Area** contains tasks for managing **Pre-production Analysis** reports.

▲ School week should have between three and seven days for Analysis.

1. Go to **Menu Planning > Reports > Pre-production Analysis**

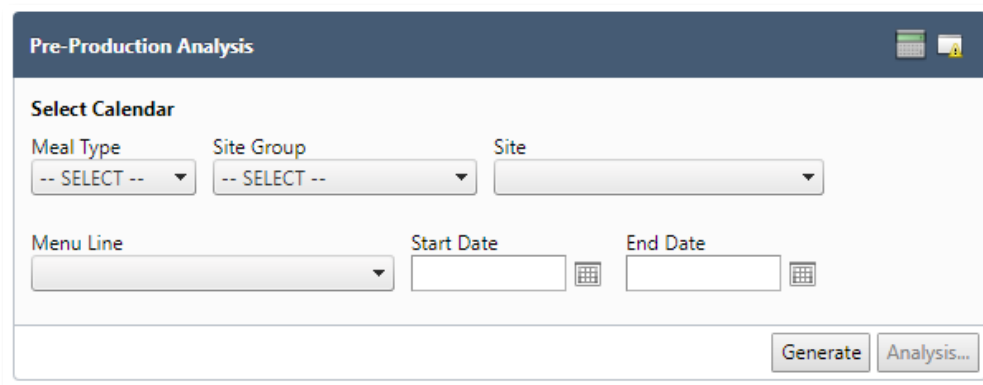


Figure 94 Pre-production Analysis

2. Filter selections by **Meal Type, Site Group, Site, Menu Line** and/or **Start/End Dates**
3. Click the **Generate** button in the lower right corner and wait for the **Analysis** button text to turn from grey to black
4. Click the **Analysis** button in the lower right corner
5. View the **Pre-production Analysis** report

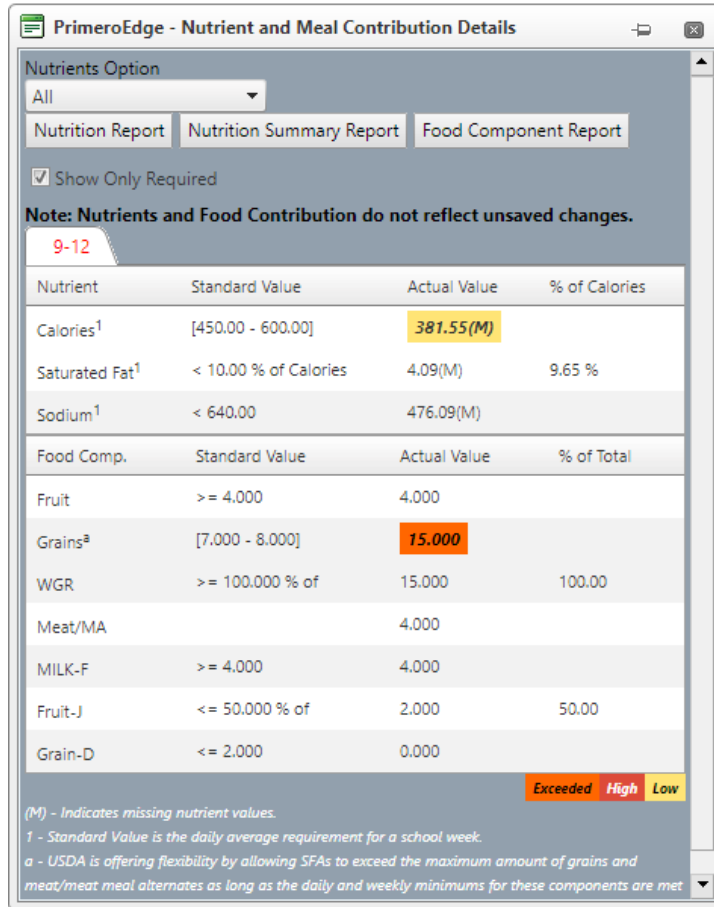


Figure 95 Nutrient and Meal Contribution Details

3.4 CONFIGURATION

Configuration allows the user to create, edit and update different areas of **Menu Planning**. This is where you will tailor PrimeroEdge to meet the needs of your district. Permissions for some areas of **Configuration** may be restricted to some users. Functions to which you have access to are dependent on your role with PrimeroEdge.

3.4.1 HACCP CONFIGURATION

HACCP Configuration lists all **HACCP** (Hazard Analysis Critical Control Point) processes used by the district. **HACCP** is an established method for juice, meat, poultry and seafood processing 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 for applied controls, which are essential to prevent or eliminate a food safety hazard or reduce it to an acceptable level

PrimeroEdge will have the three **HACCP Process**, as defined by the FDA, in the system. These include Process 1: No Cook, Process 2: Save Day Service and Process 3: Complex Food.

There may be a time where it would be beneficial to your district to add another **HACCP Process** or Critical Control Point.

Add a **HACCP Process** by completing the following steps.

1. Go to **Menu Planning > Configuration > HACCP Configuration**
2. Click **Add New Record** under HACCP Processes
3. Enter the name for the process in **Process Description** and a brief name in **Short Name**
4. Click **Insert**

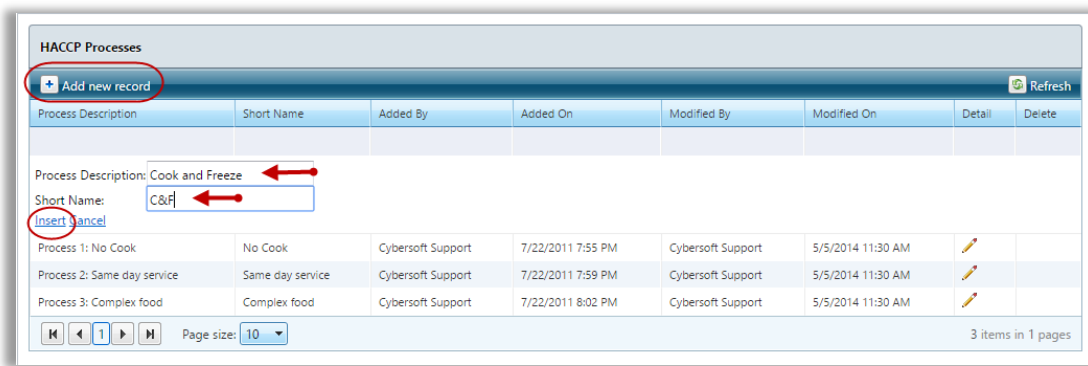


Figure 57 Add HACCP Process

Add a **Critical Control Point** by completing the following steps.

1. Go to **Menu Planning > Configuration > HACCP Configuration**
2. The CCP area is just below the HACCP Process area. Click **Add New Record**
3. Enter or select the **CCP information**
4. Click **Insert**

HACCP CCPs (Critical control points)

[+ Add new record](#)

CCP Description	Short Name	Critical Limit	Default Corrective Action
<p>Critical control points Information</p> <p>Is Active: <input checked="" type="checkbox"/> Is Active</p> <p>CCP Description: Freezing</p> <p>Short Name: Freeze</p> <p>Critical Limit Leading Text: Reduce Temperature to</p> <p>Critical Limit Operator: =</p> <p>Default Critical Temperature: 20</p> <p>Critical Limit Trailing Text: or lower</p> <p>Default Corrective Action: Bring temperature of food to 20 F within 1 hour.</p> <p>Display Order:</p> <p>Monitoring Procedure: Observe thermometer</p> <p>Monitoring Frequency:</p> <p>Insert Cancel</p>			

Figure 58 Add Critical Control Point

3.4.2 MEAL PATTERN

Meal Pattern allows you to create and manage standard and local meal patterns for serving groups of patrons. View standard meal pattern requirements by serving group and meal service. Create and change local meal patterns, as needed, by establishing local serving groups and meal services. Begin by listing Standard Meal Patterns then list any created local Meal Patterns.

View a **Meal Pattern** by completing the following steps.

1. Go to **Menu Planning > Configuration > Meal Pattern**
2. Click on the **blue arrow** to the left of the Meal Pattern you want to view
3. Click on the **hyperlink** of the Serving Group Name you want to view

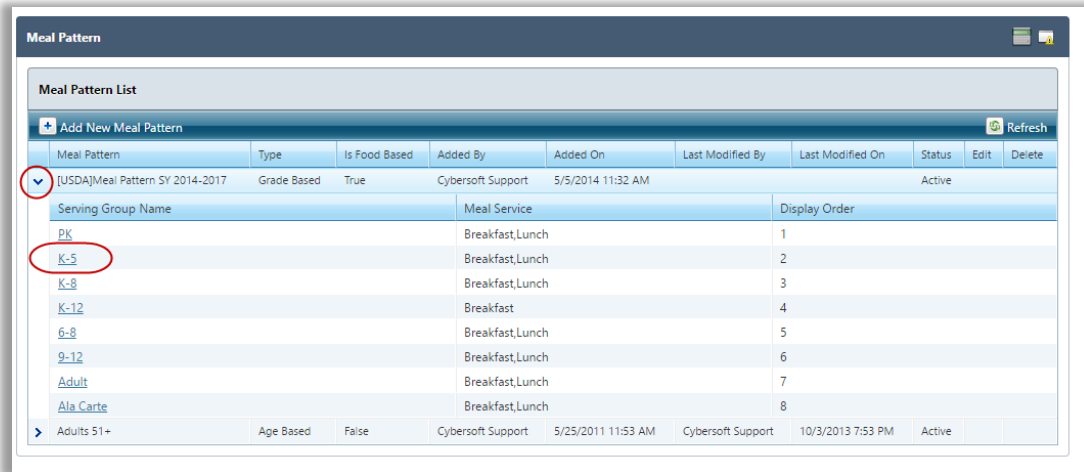


Figure 59 View Meal Pattern

- When multiple meal services are available for a meal pattern, click the **Meal Service Tab** to view nutrient and food component requirements.

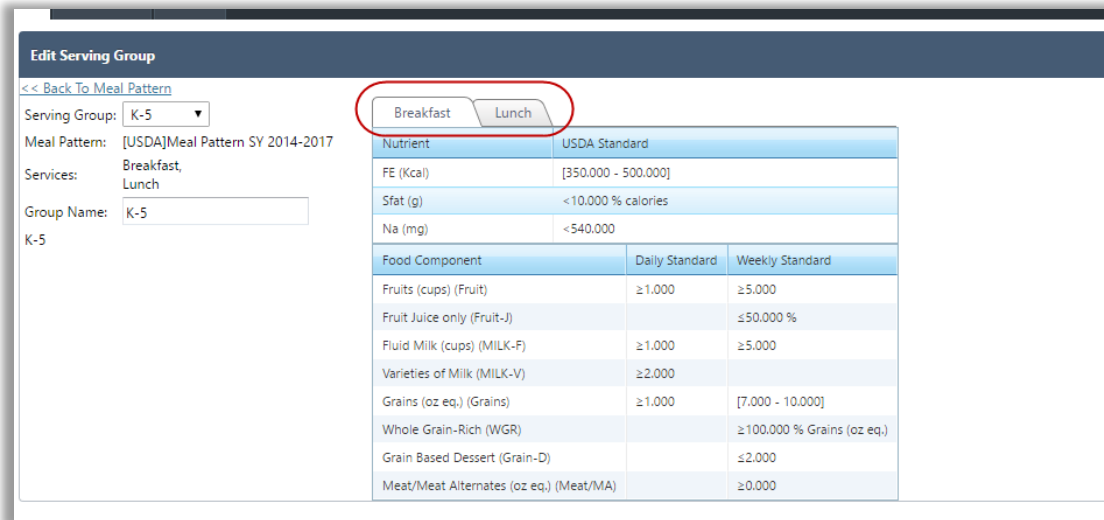


Figure 60 View Meal Pattern Tabs

Add a custom Meal Pattern by completing the following steps.

- Go to **Menu Planning > Configuration > Meal Pattern**
- Click **Add New Meal Pattern** at the top of the page
- Enter appropriate information
- Click **Insert**

▲ You can only make edits to custom **Meal Patterns**.

3.4.3 STANDARD MENU ITEMS

Standard Menu Items are those items that are included on many or all **Menus**, such as milk, fresh fruit, condiments, etc. This menu function maintains the list of **Standard Menu Items** added to a **Menu**.

☑ Adding **Standard Menu Items** eliminates adding each of these common **Menu Items** one at a time making the Menu Planner’s job quicker and easier.

Create **Standard Menu Items** list by completing the following steps.

1. Go to **Menu Planning > Configuration > Standard Menu Items**
2. Select one or more items in the **Choose Menu Items** list
3. Use filters in each column to narrow the display of menu items
4. Click **Add Selected to Standard Menu Items**
5. Selected items now show in the Standard Menu at the bottom of the page and add to your menus when the meal planner selects the **Standard Menu Items** button during the **Menu** creation phase

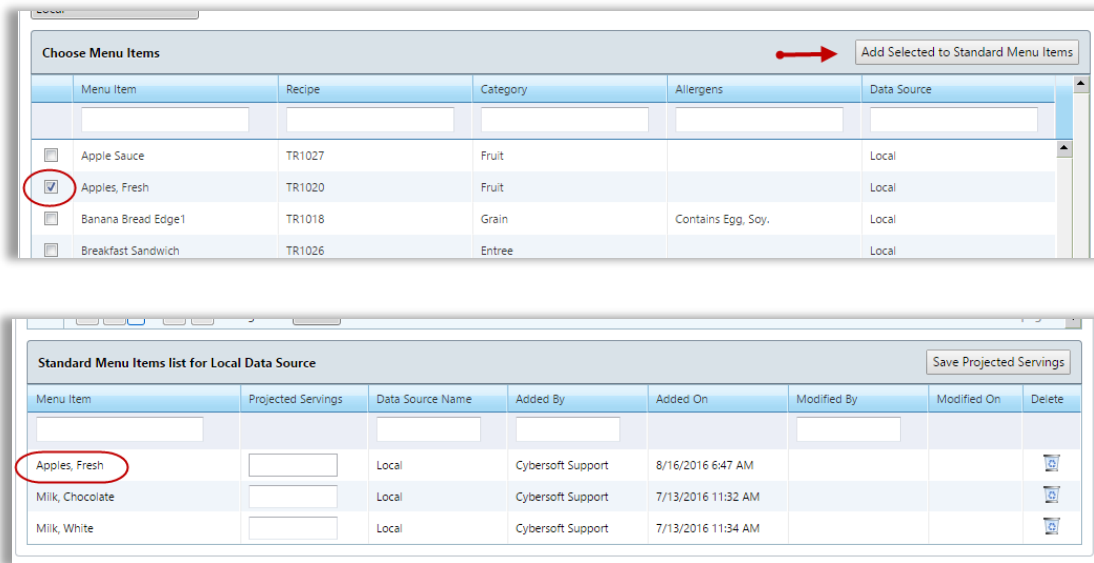


Figure 61 Add Standard Menu Items

3.4.4 CUSTOM ALLERGENS

The **Allergens** section in PrimeroEdge will already contain the most common **Allergens** listed in the **Allergen** tab for **Ingredients and Recipes**.

☑ If an **Allergen** is not included in the list, you have the option to add **Custom Allergens**.

Add **Custom Allergens** by completing the following steps.

1. Go to **Menu Planning > Configuration > Custom Allergens**
2. Choose desired **Allergen Description**

3. Click **Add**

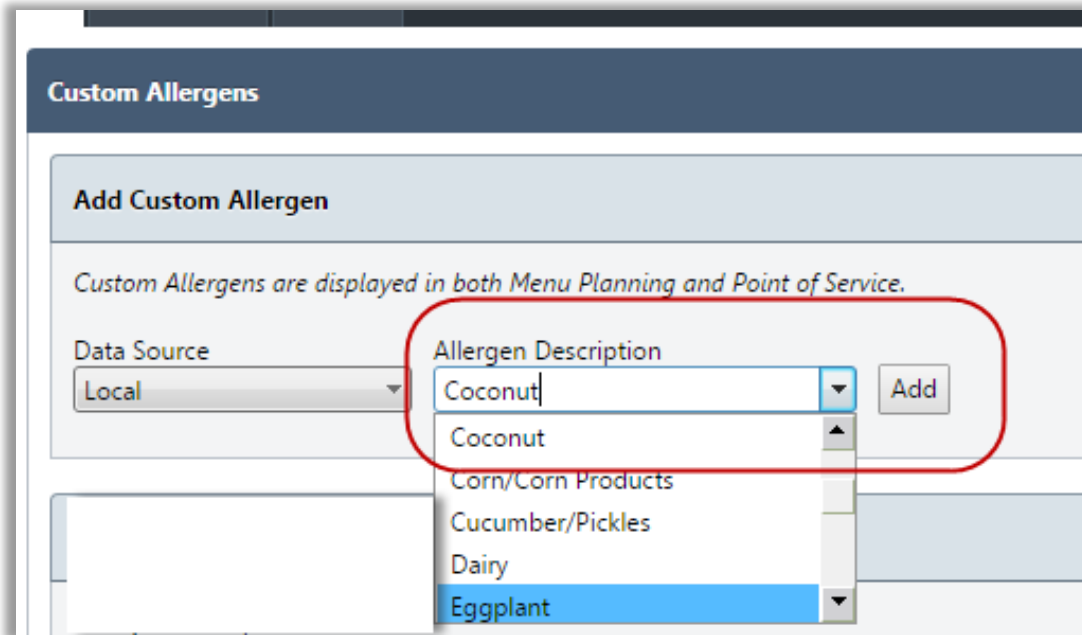


Figure 62 Add Custom Allergen

- ▲ Edit or delete **Custom Allergens** only if they are unassigned to an ingredient.

3.4.5 DATA SOURCES

A **Data Source** is a container for **Ingredients, Recipes, Menus, Menu Cycles** and **Menu Templates** that are available to and modifiable by appropriate users. The **Local Data Source** stores manually entered **Ingredients and Recipes**. The Local users' group can use, copy or update the item as needed.

Installing the PrimeroEdge **Menu Planning** also uploads the **Child Nutrition Data Source**. This database allows the use of **Ingredients with Local Recipes**. You cannot modify the **Ingredients** in the **CN database** that are "shared" with Local users. However, you can copy **Ingredients** to the **Local Data Source** and modify the copied items to suit local requirements.

☑ Sharing resources in this manner saves time by avoiding other groups duplicating the same task.

1. Go to **Menu Planning > Configuration > Data Sources**
2. View the **Data Sources** windows for **Data Sources Owned** and **Accessible Data Sources**

Data Sources Owned								
Data Source	Abbreviation	Ingredient Code Prefix	Recipe Code Prefix	Data Source Type	Version	AddedBy	AddedOn	Edit
Local	L	LI	LR	Local	v1	Cybersoft Support	8/22/2011 8:57:26 AM	

Accessible Data Sources			
Data Source	Version	Owned By	Data Source Type
Child Nutrition Database	20		Global
Cybersoft	v1		Global

Figure 96 Data Sources

3. Click on the **Edit Pencil** in the **Data Sources Owned** window to edit the Data fields for **Data Source, Abbreviation, Ingredient Code Prefix, Recipe Code Prefix** and select **Auto Generate Recipe Codes**

Data Sources Owned								
Data Source	Abbreviation	Ingredient Code Prefix	Recipe Code Prefix	Data Source Type	Version	AddedBy	AddedOn	Edit
Local	L	LI	LR	Local	v1	Cybersoft Support	8/22/2011 8:57:26 AM	
Data Source:		Local						
Abbreviation:		L						
Ingredient Code Prefix:		LI						
Recipe Code Prefix:		LR						
Auto Generate Recipe Codes:		<input checked="" type="checkbox"/>						
Update Cancel								

4. Click the link in the lower left corner to **Update** or **Cancel** as needed

3.4.6 HOLIDAY SCHEDULE

Holiday Schedule adds and manages the description of days designated as holidays, In-service, breaks or other days on which no provided meal service and to which **Menus** are unassigned. Change **Holiday** dates and descriptions as needed using the **Edit Pencil**.

- ▲ You can only remove **Holidays** from the **Holiday Schedule** only if the **Holiday** date has not passed.
- ▲ **Holidays** should be set up before **Menu Assignment** begins.
- ▲ Update **Holiday Schedules** every school year to ensure the dates are correct.

To assign **Holiday Schedules** complete the following steps.

1. Go to **Menu Planning > Configuration > Holiday Schedule**

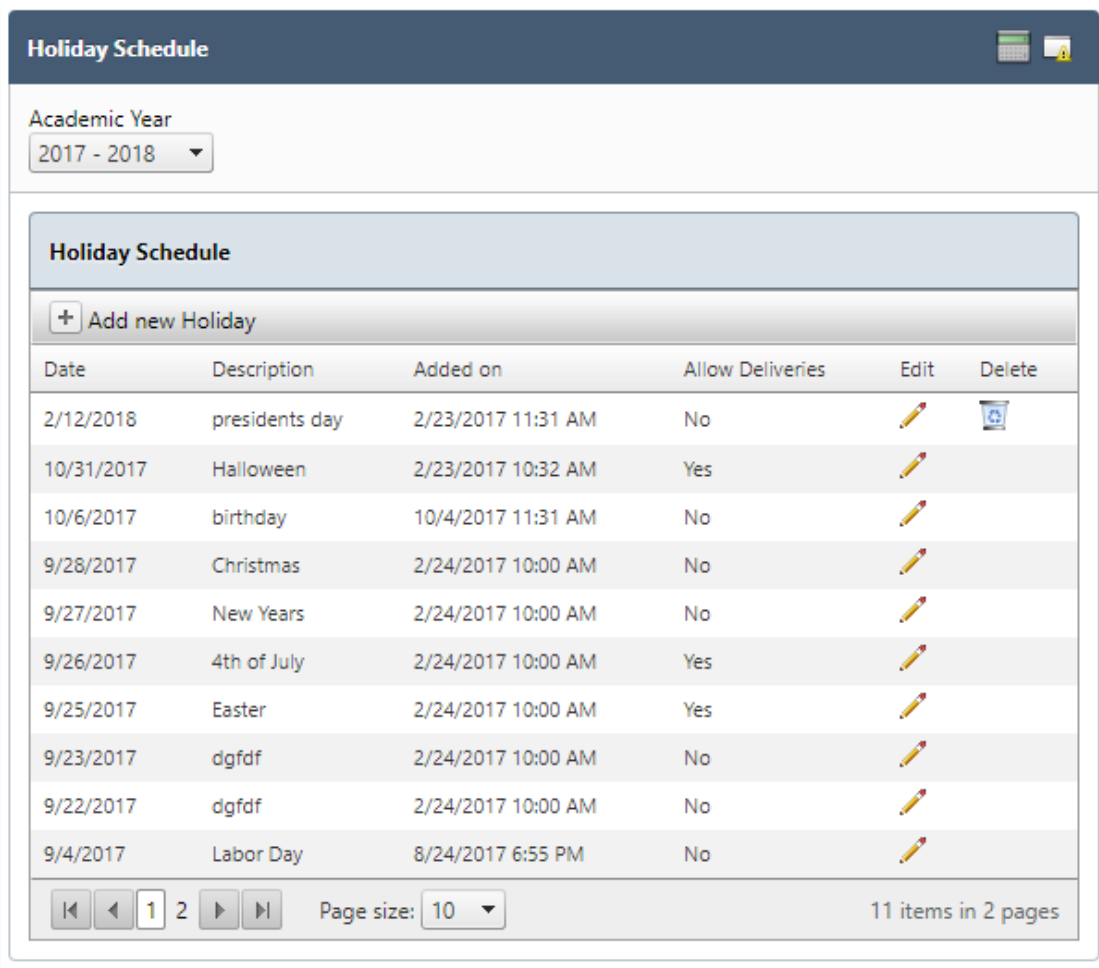


Figure 97 Holiday Schedule

2. Click **Add New Holiday** at the top of the page
3. Enter the date(s) for the Holiday in the **calendar boxes**

4. Enter a **Holiday** name in the **Description** text box
5. If deliveries are allowed during the Holiday dates, click **Allow Deliveries**
6. Click **Insert**

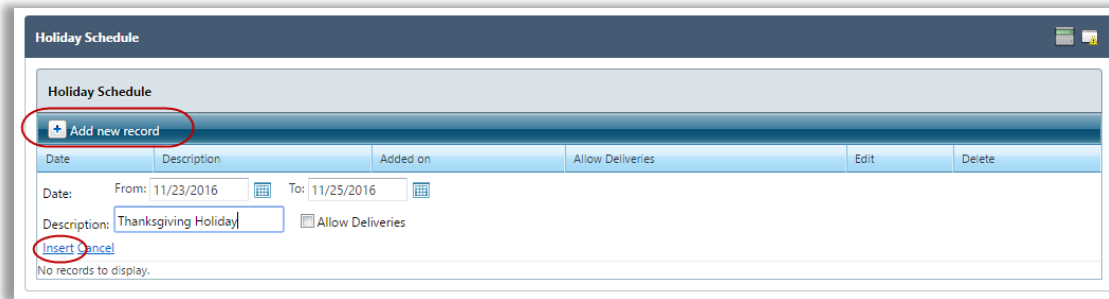


Figure 63 Add Holiday

3.4.7 MENU TEMPLATES

A **Menu Template** is a base of all **Menu** details shared by all or most **Menus**, such as **Serving Groups** and **Menu Items**. Eliminate repetitive actions for each new **Menu** with a **Template**. Perform the actions once, then make a copy for new **Menus**. Follow the same basic steps as adding a **Menu**.

✔ **Menu Templates** support the creation of menus more quickly.

▲ You add only items that are common to all **Menus** created with this template (i.e. milk, juice, condiments, etc.).

1. Go to **Menu Planning > Configuration > Menu Templates**

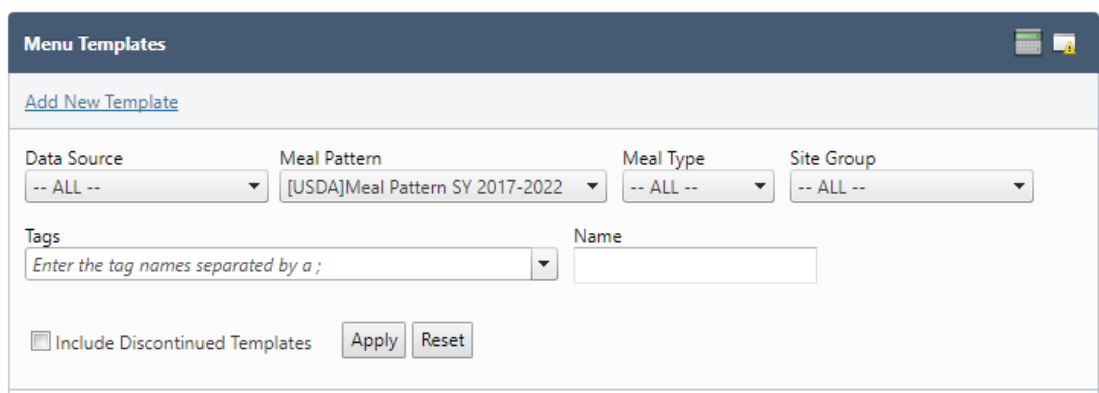


Figure 98 Add New Menu Template Link

2. Click **Add New Template**
3. Select appropriate criteria at the top. Multiple **Meal Types** and/or **Site Groups** may be selected at a time.
4. Enter a name for the template in the **Template Description** text box

5. Select one or more **Serving Groups** and enter **Projected Serving Counts** for each group
6. Select one or more **Menu Item Categories** and enter the number of choice(s) for each
7. Click **Add New Menu Template**

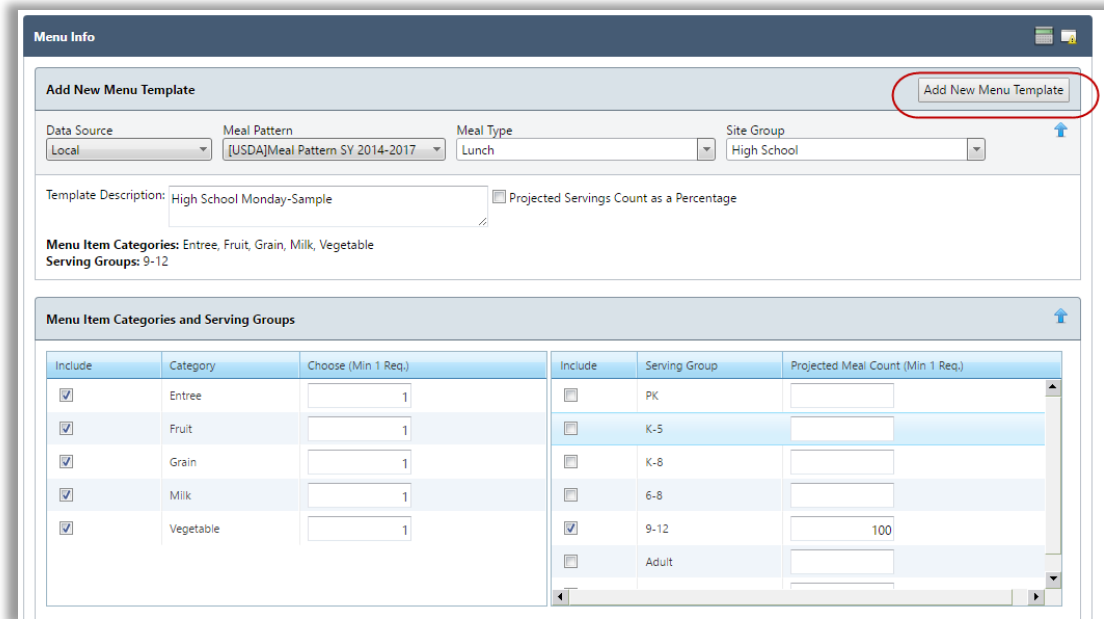


Figure 64 Create Menu Template

- The page now looks like a regular **Menu** page.
 8. Complete steps 6-7 from the **Menus** section to add menu items
 9. Click the **Save** button to retain the new **Menu Template**

3.4.8 SITE GROUPS

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

The quickest way to create **Site Groups** and assign **Sites** to a group is to use **Add Site Types as Groups** from the **System Module**. This automates the creation of one **Site Group** for each **Site Type** listed on the **Manage Site Types** page. For more information, view the **Systems Training Manual**.

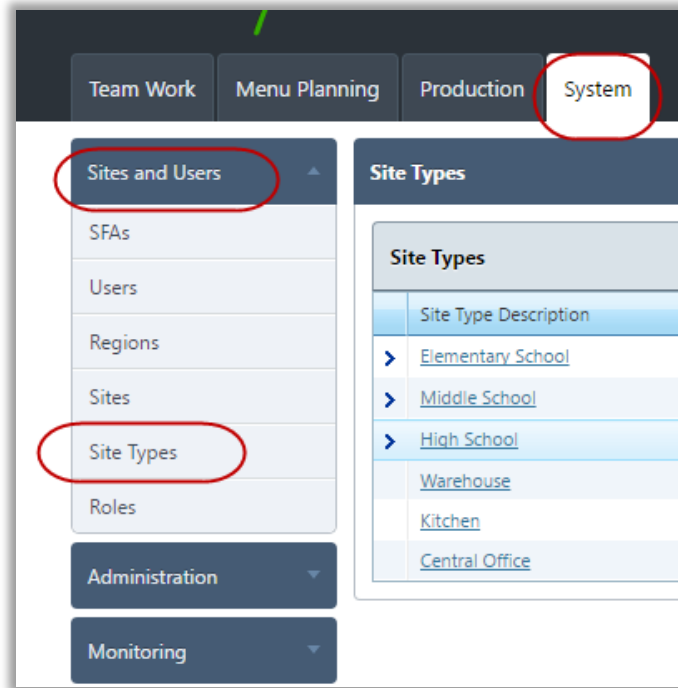


Figure 65 Assign Site Groups

Adding a **Custom Site Group** allows you to create a group name of your choice. **Individual Sites** add to the **Site Group** (i.e. Alternative School, Preschool, Ninth Grade Center, etc.).

1. Go to **Menu Planning > Configuration > Site Groups**

Description	Data Source	Added By	Added On	Modified By	Modified On	Edit	Delete
> 1,2,3 yrs	Local	Cybersoft Support	05/31/2016				
> 6-12	Local	Cybersoft Support	07/03/2014	Cybersoft Support	03/19/2015		
> Breakfast for Caines District	Local	Cybersoft Support	07/26/2017	Cybersoft Support	07/26/2017		
> Elementary School	Local	Cybersoft Support	04/24/2013	Cybersoft Support	04/24/2013		
> High School	Local	Cybersoft Support	04/24/2013				
> Jessica's Test Line	Local	Cybersoft Support	04/25/2017				
> k-12	Local	Cybersoft Support	11/04/2016	Cybersoft Support	07/27/2017		
> K-5	Local	Cybersoft Support	01/19/2015				
> K-8	Local	Cybersoft Support	02/10/2017				
> Middle School	Local	Cybersoft Support	04/24/2013				

Figure 99 Site Groups

2. Click **Add New Site Group Plus Sign** in the upper left corner of the window
3. Add a name for the **Site Group** in the **Description** text box
4. Click **Insert** or **Cancel** link in the lower left corner of the window

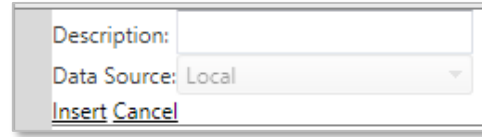


Figure 100 Add a New Site Group

Update **Sites to Site Groups** by completing the following steps.

1. Go to **Menu Planning > Configuration > Site Groups**
2. Click the **Arrow** in the left column of the window to expand the **Site Group** in which you want to **Update a Site**
3. Update the **Description** and **Data Source**, as needed
4. Click **Update** or **Cancel**, as needed

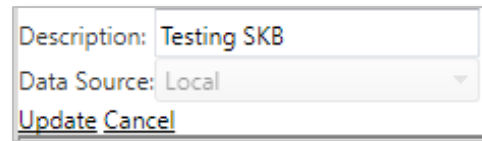


Figure 101 Update a Site

3.4.9 MENU LINES

Create **Menu Lines** when different production records require the same meal type. For example, a Regular Breakfast Menu Line service location in the cafeteria and the Classroom Breakfast Menu Line service location in a classroom. Both menu lines are for the breakfast meal type but serve different items.

Name the Menu Lines just as used at the school.

1. Go to **Menu Planning > Configuration > Menu Lines**
2. Enter a name in the **Menu Line Description** text box
3. Click the **Add** button to the right of the **Menu Line Description** field

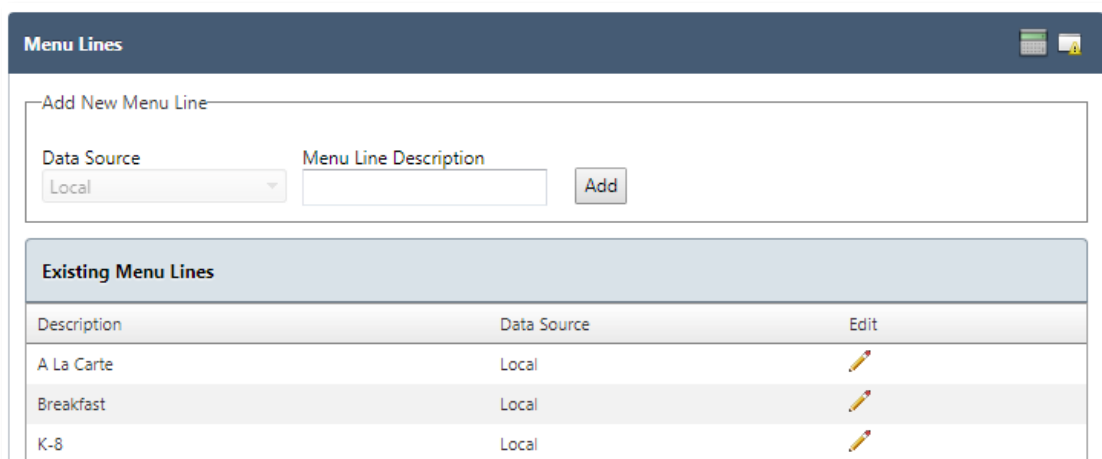


Figure 102 Menu Item

3.4.10 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, this is Optional)

▲ An established **Site Configuration** is a requirement for each feeding site to allow assignment of Menus on a Menu Calendar to the site.

1. Go to **Menu Planning > Configuration > Site Configuration**
2. Click the **blue arrow** next to the site you want to configure
3. Click **Add Meal Type to Site**
4. Select **Meal Type** from the dropdown menu
5. Check **OVS** box if site is **Offer vs Serve**
6. Select all the **Menu Lines** available at that site for the **Meal Type**
7. Click the **Insert** link in the lower left corner

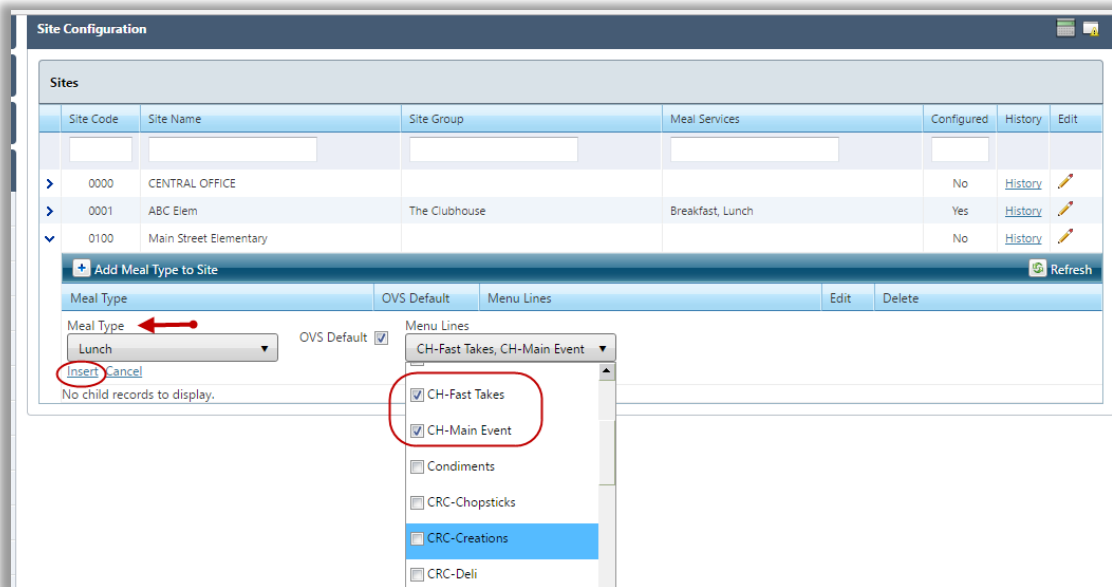


Figure 68 Site Configuration

Now, you will need to configure the **Site Group** and add an **Effective (or start) date** for the site.
 ▲ Without an **Effective Date**, the menus assigned for each menu line will not show up on your production calendars at the site level.

1. Click the **Pencil Edit** on the right side of the window associated with the desired site
2. Select the appropriate **Site Group** from the dropdown menu
3. Select an **Effective Date** from the calendar

▲ The **Effective Date** is the start date for the site and requires updating for properly assigned menus.

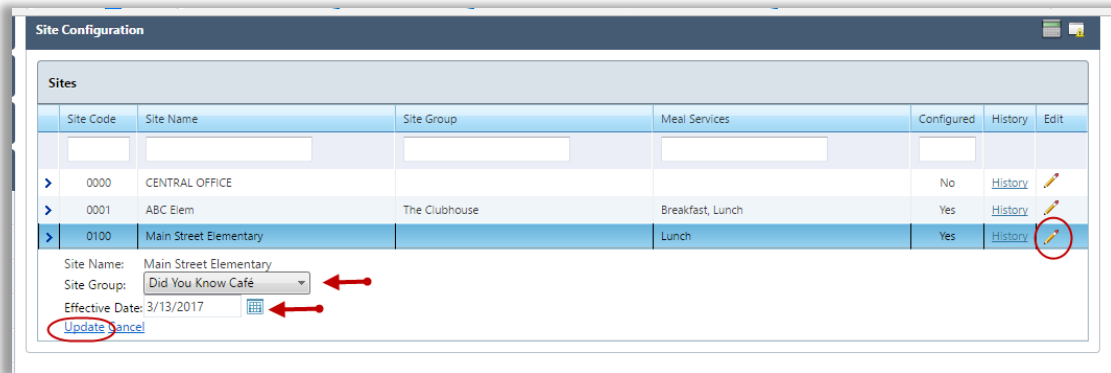


Figure 69 Site Group Configuration

3.4.11 IMPORT/EXPORT

This **Functional Area** manages tasks for monitoring **Import/Export** progress.

1. Go to **Menu Planning > Configuration > Import/Export**
2. Filter selection by click on the **Import or Export** circles on the left side of the window
3. Click on the **Next** button in the lower right corner
4. View **Import** data progress



Figure 103 Import

5. View **Export** data progress

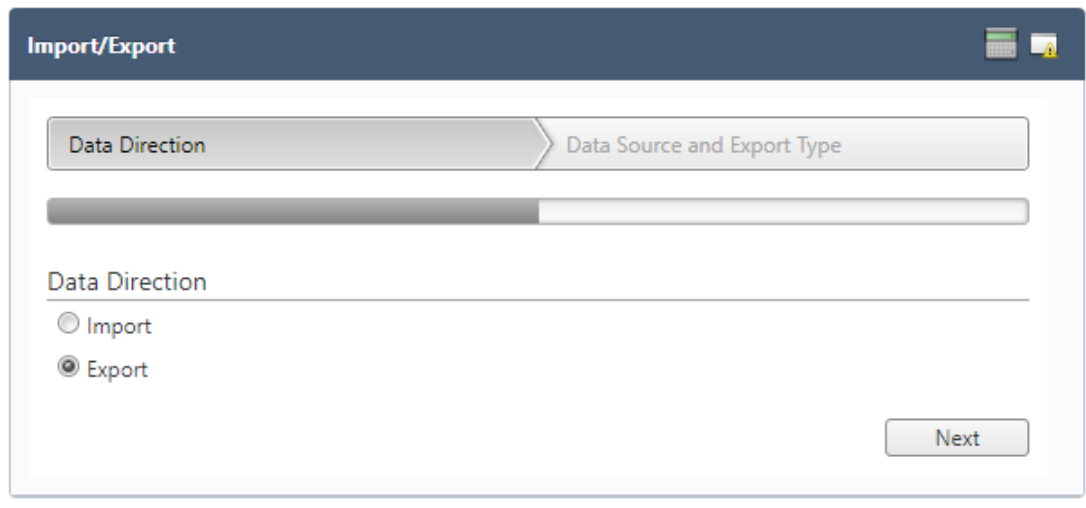


Figure 104 Export

3.4.12 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 for example, adding a **Menu Item** to a **Menu** or reviewing **Menu Items** while assigning or building a **Menu**.

1. Go to **Menu Planning > Configuration > Menu Item Categories**
2. Select the appropriate **Data Source** from the dropdown menu
3. Enter a name for the new Menu Item Category in the **Category Description** text box
4. Enter the number of the order you would like to view the new **Menu Item Category** in the **Display Order** text box
5. Click **Add**

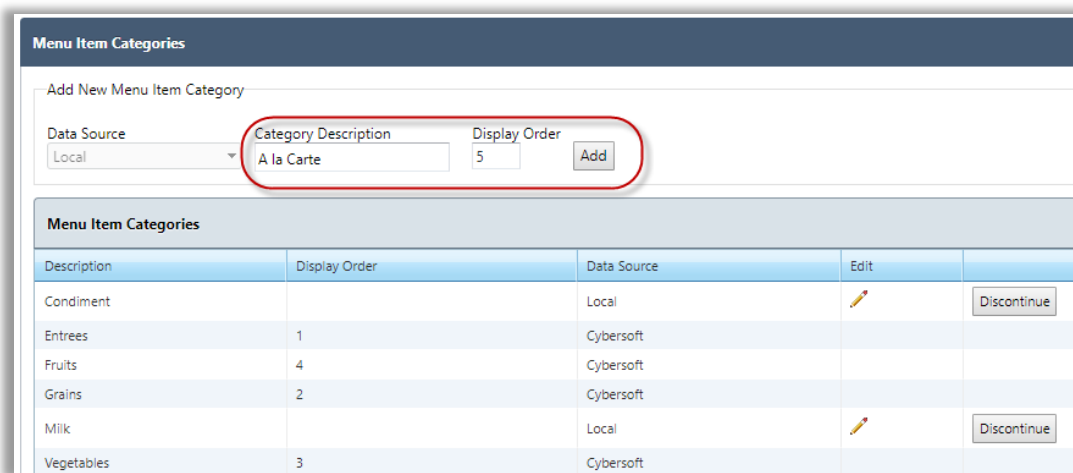


Figure 70 Add Menu Item Category

3.5 FORECAST

There are three **Functional Areas** within the **Forecast Category**: **Forecasts**, **Combined Forecast** and **Forecast Periods**.

3.5.1 FORECASTS

This **Functional Area** contains tasks for managing **Forecasts**.

1. Go to **Menu Planning > Forecast > Forecasts**

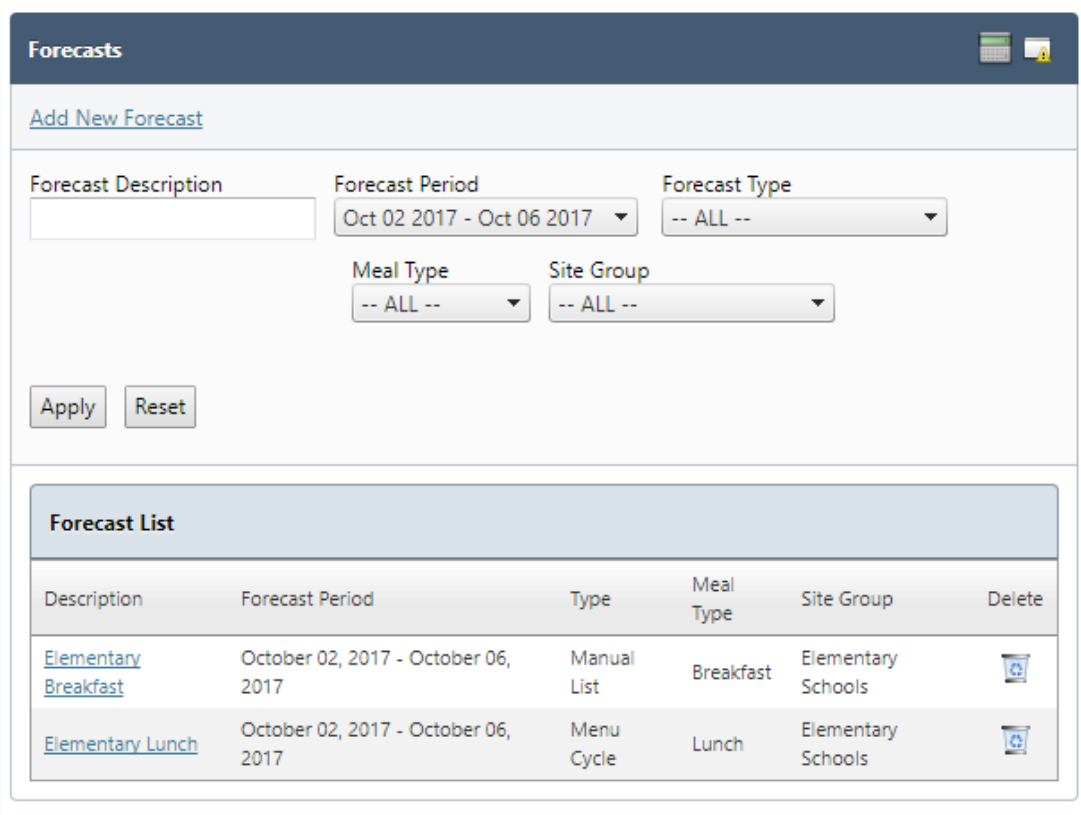


Figure 105 Forecasts

2. Filter selections by **Forecast Description, Forecast Period, Forecast Type, Meal Type** and **Site Group**
3. Click the **Apply** button in the lower left corner

3.5.1.1 ADD A NEW FORECAST

This **Functional Area** contains tasks for managing the addition of a **New Forecast**.

1. Click on the **Add a New Forecast** link in the upper left corner to **Add a New Forecast**

Figure 106 Add New Forecast

2. Complete the fields for the New Forecast
3. Click on the **Add a Forecast Period** link to create a new **Forecast Period**
4. Click the **Save** button in the lower left corner when complete

3.5.1.2 FORECAST MENU ITEMS

This **Functional Area** contains tasks for managing the **Forecast of Menu Items**.

1. Click on a link in the **Forecast List**

Forecast List					
Description	Forecast Period	Type	Meal Type	Site Group	Delete
Elementary Breakfast	October 02, 2017 - October 06, 2017	Manual List	Breakfast	Elementary Schools	
Elementary Lunch	October 02, 2017 - October 06, 2017	Menu Cycle	Lunch	Elementary Schools	

2. View the list of **Forecast Menu Items**

Forecast Menu Items								Add Menu Items...
Recipe Code	Menu Item	Serving Size	Meal Contribution	Number Of Servings	Materials Needed	Cost Per Serving (\$)	Total Cost (\$)	
Single-LR-14130	Alfredo Sauce	1 Bag	1 MILK-F	<input type="text" value="1"/>	0 Case 1 (6lbs) each Alfredo Sauce	10.8525	10.85	
PER C-01	Apple Cobbler C-01- Nutritional analysis recipe	1 portion	3 Fruit, 3 Veg-DG	<input type="text" value="1"/>				
PER C-02A	Apple Honey Crisp C-02A	1 Piece		<input type="text" value="1"/>				

Figure 107 Forecast Menu Items

3. Click on the **Add Additional Items** button in the upper right corner to **Add Menu Items to the Forecast**

Add Menu Items							Add
Category	Menu Item (Recipe, Ingredient Code)	Serving Size*	Meal Contribution*	Allergens	Data Source		
<input checked="" type="checkbox"/>	Extra snack (SBCP-5209)-Turkey Pot Pie (LR-1210)	1 Serving	2 Meat/MA	Processed in a facility that also processes Egg Milk Tree nuts.	Local		
<input checked="" type="checkbox"/>	Fruit (SBCP-5272)- R2S12-Cp4 (R2S12-Cp4)	1 Each		Processed in a facility that also processes MILK.	Local		
<input checked="" type="checkbox"/>	Desserts Alfredo Sauce (Single-LR-14130_900229)	1 Bag	1 MILK-F		Local		
<input checked="" type="checkbox"/>	Fruit Apple Cobbler C-01- Nutritional analysis recipe (PER C-01)	1 portion	3 Fruit 3 Veg-DG		Cybersoft		
<input checked="" type="checkbox"/>	Extra Apple Honey Crisp C-02A (PER C-02A)	1 Piece			Cybersoft		
<input checked="" type="checkbox"/>	Fruit Apple juice, canned or bottled, unsweetened, witho (TR100006_9016)	1 drink box (8.45 fl oz)	1/2 Fruit 1/2 Fruit-J		Local		
<input checked="" type="checkbox"/>	Fruit Apple Slices, IW (Single-LR-1375_900429)	1 Each	1 Fruit		Local		
<input type="checkbox"/>	Meals Apple spice stick, breaded, 6/2 lb; as purchased (CP000007)	7 Piece			State Level		

* - Serving Size and Meal Contributions are displaying the default for the Menu Item.

Figure 108 Add Menu Items

3.5.2 COMBINED FORECAST

This **Functional Area** contains tasks for managing a **Combined Forecast**.

1. Go to **Menu Planning > Forecast > Combined Forecast**
2. Filter selections by **Forecast Description, Forecast Period, Forecast Type, Meal Type** and **Site Group**
3. Click the **Apply** button in the left corner

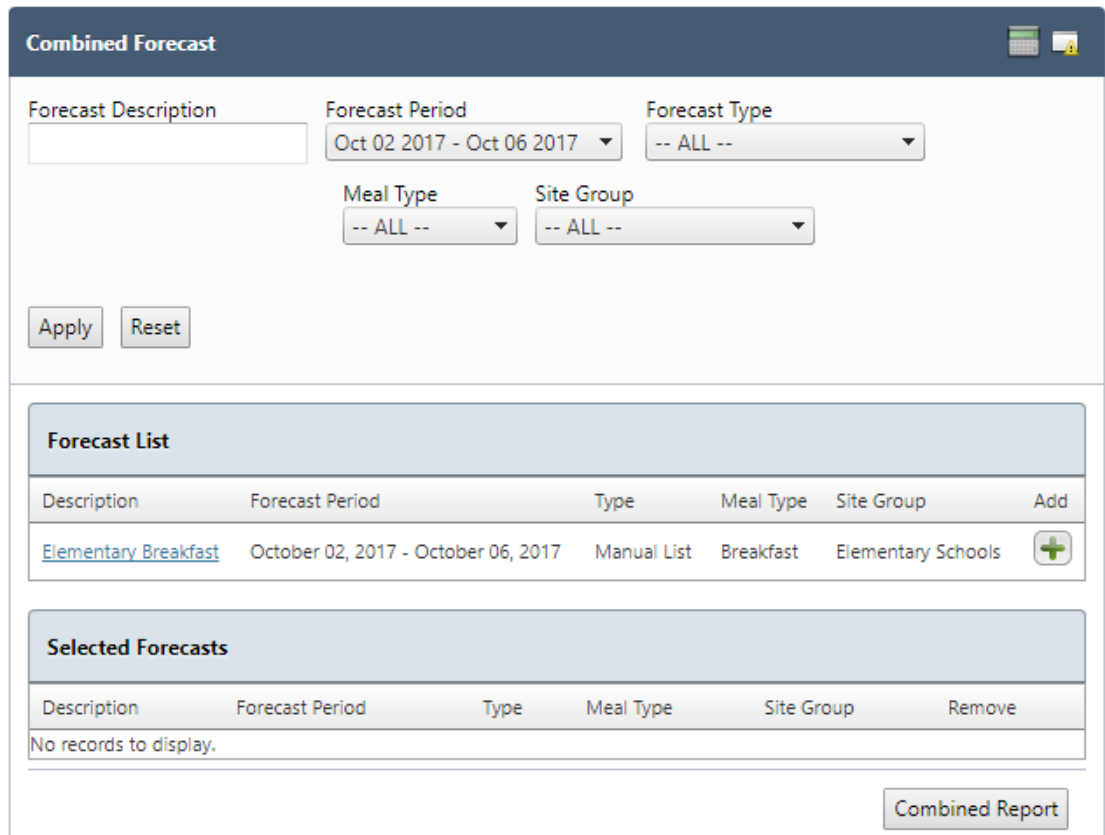


Figure 109 Combined Forecast

4. Click on the **Green Plus Sign** icon on the right side of the **Forecast** list window to **Add a Forecast** to the **Selected Forecasts** window

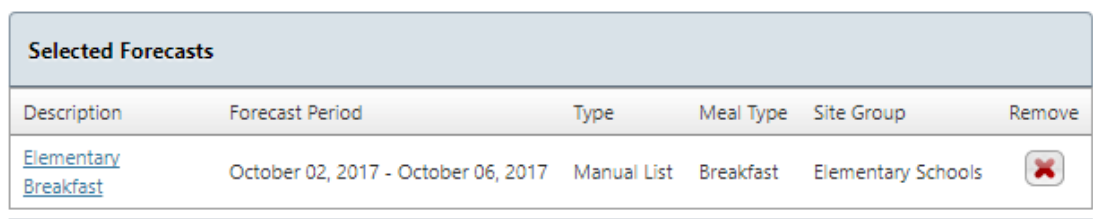


Figure 110 Selected Forecasts

5. Click on the **Combined Report** button in the lower right corner of the **Combined Forecast** window
6. View the **Combined Report**

Forecast Materials Report Generated on: 11/20/2017 12:33:06 PM by Cybersoft Support

Forecast: Elementary Breakfast
 Type: Combined Forecast
 Period: Oct 02 2017 - Oct 06 2017

Planned Menu Items

Recipe Code	Menu Item	Serving Size	Meal Contribution	Servings	Materials Needed
LR-1210	(SBCP-5209)-Turkey Pot Pie	1 serv.	2 Meat/MA	1	0 Case 1 7lb bag Turkey, with gravy, all white; 0 Gallon 1 Gal Water, Tap; 0 Case 1 (6lbs) each Alfredo Sauce; 0 Bag 1 pounds Flour; 0 Case 1 (=10 cans) each Apples, Sliced; 0 Case 1 (2.5lbs) each Peas and Carrots, Frozen; 0 Bag 1 bag changing link of ingredient to stock item from DST1002 to this for ingredient 900024; 0 Can 1 pounds Baking Powder; 0 Bag 1 pounds Sugar, Brown, Light; 0 Case 1 each Margarine, Bulk; 0 Case 1 (42oz) each Oatmeal, Bulk; 0 Carton 1 pounds Shortening, Solid; 0 Case 1 pounds Sugar, Granulated; 0 Bag 1 pounds Milk, NFDN
R2S12-Cp4	(SBCP-5272)- R2S12-Cp4	1 ea.		1	0 Bag 1 each Bun, Hamburger, Whole Wheat, 4", 304; 0 Case 1 (3.4oz) each Chicken Patty, FC (commodity); 0 Case 1 (6lbs) each Alfredo Sauce; 0 Case 1 (=10 cans) each Apples, Sliced; 0 Bag 1 pounds Sugar, Brown, Light; 0 Bag 1 pounds Flour; 0 Case 1 each Margarine, Bulk; 0 Case 1 (42oz) each Oatmeal, Bulk; 0 Case 1 pounds Sugar, Granulated; 0 Bag changing link of ingredient to stock item from DST1002 to this for ingredient 900024
Single-LR-14130	Alfredo Sauce	1 Bag	1 MILK-F	1	0 Case 1 (6lbs) each Alfredo Sauce
PER C-01	Apple Cobbler C-01-Nutritional analysis recipe	1 portion	3 Fruit, 3 Veg-DG	1	
PER C-02A	Apple Honey Crisp C-02A	1 Piece		1	
TR100006	Apple juice, canned or bottled, unsweetened, witho	1 drink box (8.45 fl oz)	1/2 Fruit, 1/2 Fruit-J	1	
Single-LR-1375	Apple Slices, IW	1 ea.	1 Fruit	1	0 Case 1 200/2oz pkg each bid pricing Apple Slices, IW

Required Materials

Item #	Description	WU Cost(\$)	WU Needed	Total Cost (\$)
Item Category: Bakery/Spices				
DST1004	changing link of ingredient to stock item from DST1002 to this for ingredient 900024 (Bag = 1 bag/1.0000 Pound)	1.0000	1	1.00
SBRM-4783	Baking Powder (Can = 5 pounds/1.0000 Pound)	4.4700	1	4.47
SBRM-4797	Flour (Bag = 25 pounds/1.0000 Pound)	9.8000	1	9.80
SBRM-4804	Margarine, Bulk (Case = 30 each/1.0000 Pound)	21.9400	1	21.94
SBRM-4806	Milk, NFDN (Bag = 50 pounds/1.0000 Pound)	63.5600	1	63.56
SBRM-4836	Sugar, Brown, Light (Bag = 25 pounds/1.0000 Pound)	22.0100	1	22.01
SBRM-4838	Sugar, Granulated (Case = 50 pounds/1.0000 Pound)	35.8100	1	35.81
SBRM-5842	Shortening, Solid (Carton = 50 pounds/1.0000 Pound)	40.0600	1	40.06
Subtotal: Bakery/Spices				198.65
Item Category: Beverages				

Figure 111 Forecast Materials Report

3.5.3 FORECAST PERIODS

This **Functional Area** contains tasks for managing **Forecast Periods**.

1. Go to **Menu Planning > Forecast > Forecast Periods**
2. View the **Forecast Periods** list

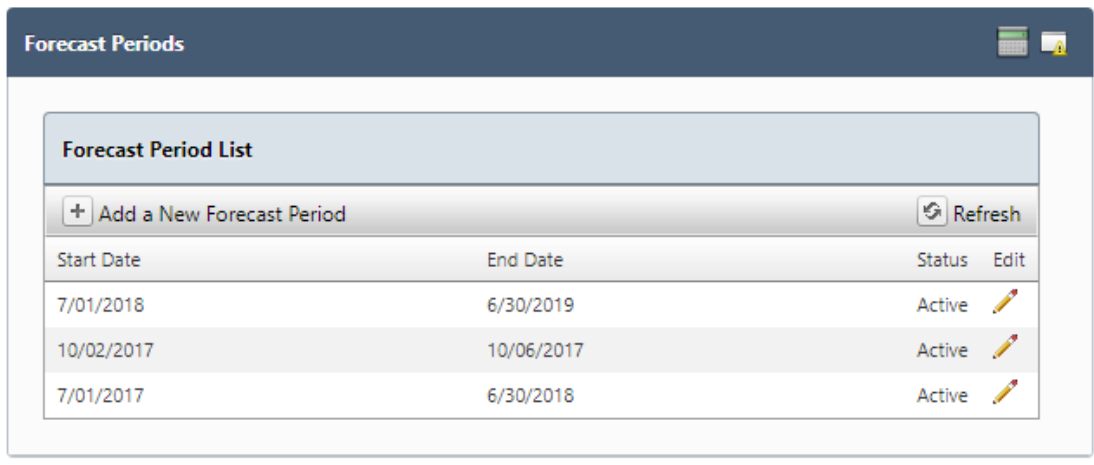


Figure 112 Forecast Period List

3. Click on the **Plus Sign** in the upper left corner to **Add a New Forecast Period**
4. Complete the **Start** and **End Dates** for the **New Forecast Period**
5. Click on the **Active** square
6. Click on **Insert** or **Cancel**, as needed, for the **New Forecast Period**

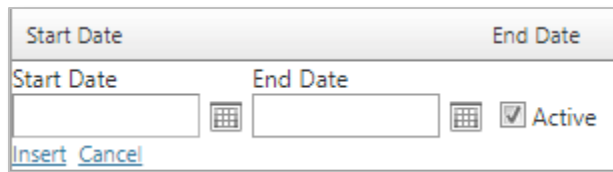


Figure 113 Add a New Forecast Period

7. Click on the **Pencil Edit** icon to **Edit** an existing **Forecast Period**
8. Edit the **Start** and **End Dates**
9. Click the **Active** square
10. Click the **Update** or **Cancel** link in the lower left corner as needed

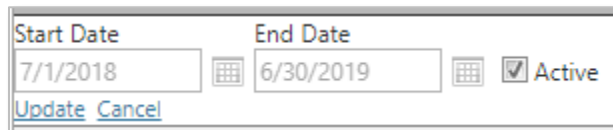


Figure 114 Update a Forecast Period

4 WHAT'S NEXT?

You have completed **PrimerEdge Menu Planning Training!** Assess your knowledge with the **Knowledge Check** in **Appendix B**. There are a number of other courses based on your role and responsibilities. See the **Training Matrix** in the **Appendix C** for an overview of other training courses for you.

APPENDIX A — NOTE TAKING TEMPLATE

Turn your training notes into a useful tool for reference. Keep a list of the main topics. Enter **Action** notes in the **Action** column and assign a **Markup Note (MN)** from the list at the bottom of the page for example () follow-up with IT on this or ? is shredded cheese a commodity.

MN*	Actions	Notes
Summary		
*Markup Note (MN): <input type="checkbox"/> = To-Do Item, () = Delegate, ☆ = Important Fact, ? = Research, ✓ = Covered		

APPENDIX B — MENU PLANNING KNOWLEDGE CHECK

Test your PrimoEdge **Menu Planning** knowledge with the following questions. Answers are at the bottom of the page.

1. What is the difference in the **Ingredient Name** and the **Ingredient Short Name**?
2. Where would you find the **Allergens** for an **Ingredient**?
3. Will an **Ingredient** that is also a **Recipe**, like milk cartons, automatically create the recipe?
4. What if I forget a step in a dual entry recipe that has already been saved?
5. What is the difference in the **Menu Item Name** and **Marketing Name** for a **Menu Item**?
6. On the serving groups, if Adult is chosen, will that show up on the **Nutritional Analysis**?
7. Are the projected numbers calculated daily?
8. What if I entered wrong number of weeks in a **Menu Cycle** and saved it, will I be able to edit?
9. Can I assign more than one **Menu** to a day?

Answers

1. The **Ingredient Name** is usually a longer identifying description of the ingredient and a short name is a type of shorthand or more often used name for the **Ingredient**
2. Generally, **Allergen** information is found on the food label or manufacturer worksheets
3. No, you must use the “**Create Recipe**” button to create a **Recipe** from a **Single Ingredient**
4. Additional steps can be added to a recipe at any time. Go back to the **Ingredients** tab to add a step. You can re-organize recipe steps by clicking and dragging the step
5. The **Menu Item Name** will be the same as the **Recipe Name**. A **Marketing Name** will be something that may make the item easier to distinguish on a menu calendar or **ParentOnline**. Example: Menu Item Name-Deli Turkey on Tortilla; Marketing Name-Turkey & Cheese Roll-Up
6. **Nutritional Analysis** can be run separately for each serving group
7. Yes, they are the ones districts are used to adding in (these are district wide numbers)
8. You can't edit but you can rename or discontinue then recreate the correct cycle
9. Yes, you can assign as many **Menus** to a day as you need: breakfast, regular lunch, pizza line, sandwich line, etc.

APPENDIX C — TRAINING MATRIX

Training Matrix The Training Matrix helps with course selection. For more information, see the PrimeroEdge Course Catalog .		
Courses	Job Role	Modules
Configuration	Central Office, Site Managers Site Supervisors	Point of Service (POS)
Cashier Pre-Training	Central Office, Site Managers, Site Supervisors	
Cashier	Site Managers/Supervisors, Cashiers	
ExpressPoint	Cashiers, Site Managers, Site Supervisors	
Manager/Reconciliation	Central Office, Site Managers/Supervisors, Lead Cashiers	
Reports	Central Office, Site Managers, Site Supervisors	
End of Month	Central Office	
School Café	Central Office, Site Managers, Site Supervisors	
POS Q & A	Site Managers/Supervisors, Cashiers	
Configuration	Central Office and District IT	
Direct Approvals/Students and Letter Templates	Central Office, Student Eligibility Site Managers, Supervisors, Processors	
Applications and Online Applications	Central Office, Student Eligibility Site Managers, Site Supervisors, Processors	
Student Eligibility Q & A	Central Office, Student Eligibility Site Managers, Site Supervisors, Processors	Food Distribution
Configuration and Training	Central Office, Food Distributing Managers/Supervisors	
SFA Training	Central Office	Inventory
Configuration Training	Central Office, Inventory Managers/Supervisors	
Inventory Pre-Training	Central Office, Inventory Managers/Supervisors	
Inventory	Central Office, Inventory Managers/Supervisors, Inventory Leads	
Intelliscan	Central Office, Inventory, Warehouse Managers/Supervisors, Inventory Leads	
Inventory Q & A	Central Office, Inventory, Warehouse Managers and Supervisors, Inventory Leads	Central Warehouse
Central Warehouse Configuration	Central Office, Warehouse Managers and Supervisors	
Central Warehouse	Central Office, Warehouse Managers and Supervisors	
Central Warehouse Q & A	Central Office, Warehouse Managers and Supervisors	Structured Menu Planning
Structure Menu Planning	Central Office, Menu Planner	
Ingredients and Stock Items	Central Office, Menu Planner	
Recipes and Menu Items	Central Office, Menu Planner	
Menus and Menu Cycles	Central Office, Menu Planner	
Menu Planning Q & A	Central Office, Menu Planner	Flexible Menu Planning
Configuration Training	Central Office, Menu Planner	
Flexible Menu Planning 1	Central Office, Menu Planner	
Flexible Menu Planning 2	Central Office, Menu Planner	
Menu Planning Q & A	Central Office, Menu Planner	Production
Production Pre-Training (Optional)	Central Office, Menu Planner, Nutrition Staff	
Production Training	Central Office, Menu Planner, Nutrition Staff	Central Production
Central Production Configuration	Central Office, Nutrition Staff	
Central Production Training	Central Office, Nutrition Staff	Financials
Financials Configuration	Central Office, District Accounting Staff	
Financials Functionality	Central Office, District Accounting Staff	
Financials Q & A	Central Office, District Accounting Staff	
Financials Budgeting (Optional)	Central Office, District Accounting Staff	Bid Analysis
Bid Analysis Administration Training	Central Office, Managers, Supervisors	
Bid Analysis Q & A	Central Office, Managers, Supervisors	Teamwork
Teamwork	Central Office, Managers, Supervisors, Training Manager	
Reviews for State Office Staff	State Administrator, Managers, Supervisors	Reviews
Reviews for State Reviews	State Administrator, Managers, Supervisors	
Reviews for SFA	District Administrator, Managers, Supervisors	

APPENDIX D — PUBLICATION REVIEW

<p>Instructions</p>	<p>Did you find an error in this document? Send a copy of this completed page to PrimeroEdge Customer Success at customersuccess@primeroedge.com</p>
<p>Publication Name <i>Example:</i> <i>Systems Training Manual 1.0</i></p>	
<p>Publication Release or Version Number <i>Example: 1.0</i></p>	
<p>Review Date <i>Example: 5 Nov 17</i></p>	
<p>Reviewer Name <i>Example: Jane Dietician</i></p>	
<p>Reviewer Organization <i>Example: USA School District</i></p>	
<p>Comments by Section and Page Number <i>Example: Section 3.4.1 on pg. 3-22 Import Pictures says .png instead of .jpg</i></p>	

General Comments:

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