

NAVIGATING PRIMEROEDGE

Training Manual for Child Nutrition Software Solutions

Cybersoft PrimoEdge 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 for navigating PrimoEdge processes. The instructions require basic computer knowledge.

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PrimerEdge Food Service Solutions

PrimerEdge Navigating PrimerEdge Training Manual

Release 7.15

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NAVIGATING PRIMEROEDGE

TRAINING MANUAL FOR CHILD NUTRITION SOFTWARE SOLUTIONS

1 INTRODUCTION

Somewhere at a school cafeteria, a manager is struggling with regulatory requirements.

A stressed cashier just had the same student approach in a period of five minutes, request an à la carte item, switch to a full meal, then return the meal.

An irate parent is calling a school receptionist to complain that one twin has no money on the cafeteria account while the other has all of the money.



Figure 1 Before PrimoEdge

Cybersoft PrimoEdge is a leading provider of software solutions to Child Nutrition Departments in K-12 school districts and State Agencies across the nation. We work daily to support and simplify the work of cafeteria managers, cashiers, nutritionists, parents, students and all the school nutrition professionals needed for a successful café program.



Figure 2 After PrimoEdge

1.1 PURPOSE

This training manual contains screen shots and stepwise instructions for navigating PrimoEdge software applications. This manual is helpful whether you are new or just require a refresher.

1.2 SCOPE

This training manual contains instructions for PrimoEdge software applications. This manual contains instructions that require basic computer knowledge.

1.3 SYSTEM ORGANIZATION

PrimerEdge 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.

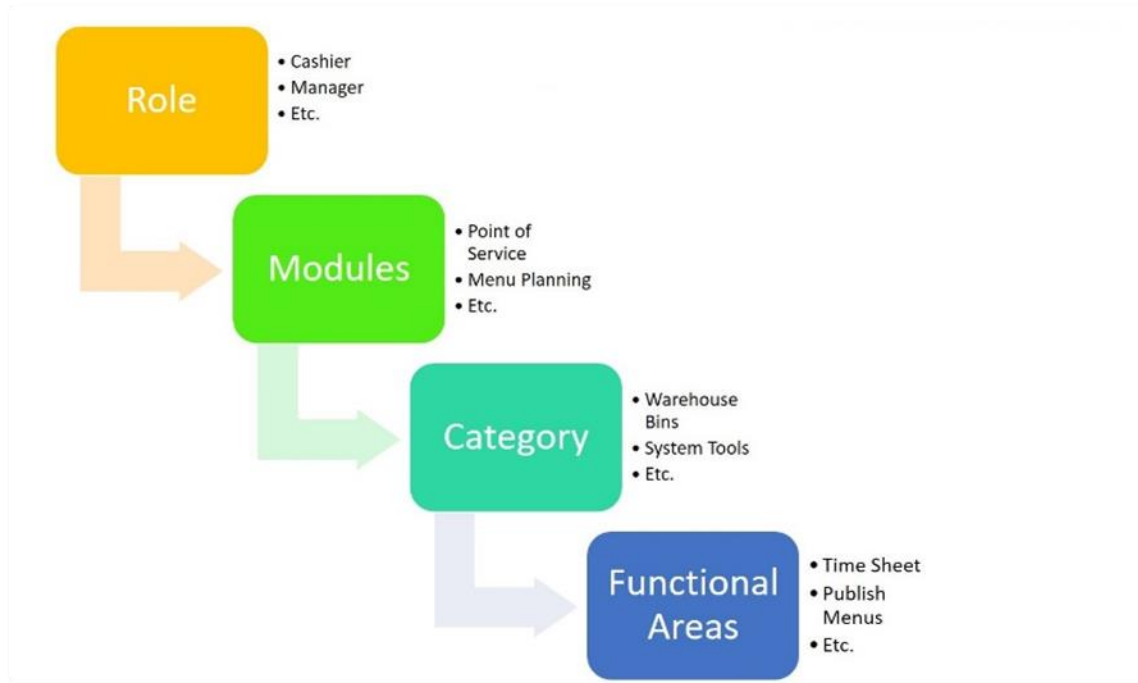


Figure 3 PrimoEdge Structure

The numbers and types of **Modules**, **Categories** and **Functional Areas** are dependent upon your system selections. Your role also changes what you see. Some **Modules**, **Categories** and **Functional Areas** are visible to you and some are not. For example, the manager, cashier, warehouse specialist may have different views.

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

1.4 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 **System > 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 PrimoEdge courses.

1.5 PRINTING CONTROLS

PrimoEdge generates reports that appear in a separate window on your computer. Follow these steps to print a report.

1. Generate the report

Application Approval List

Batch	Application	Amount	Frequency	Size	SNAP/TANF	Eligibility	Basis
Determining Official:							
62	861	\$1,200.00	E	4		Free	Income
69	926	\$5,900.00	M	4		Denied	Income
69	933	\$2,100.00	M	4		Free	Income
70	948					Free	Income
70	956					Free	Income
69	966	\$179.00	M	3		Free	Categorical
69	969	\$0.00	Y	3		Free	Categorical
Determining Official:							
70	949	\$450.00	W	4		Free	Income
70	953	\$900.00	E	5		Free	Income

Reviewing Official's Signature: _____ Date: _____
 Confirming Official's Signature: _____ Date: _____
 Follow-up Official's Signature: _____ Date: _____
 * Indicates the application was reprocessed after the date for which the report was generated.

Page: 1 of 1

Figure 4 Report Example

2. View the toolbar at the top of the report

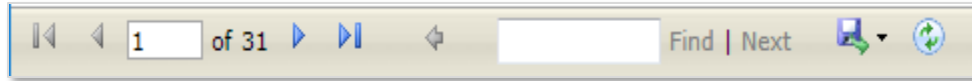


Figure 5 Report Toolbar

3. Click on the single **Green Arrow** to open the download options

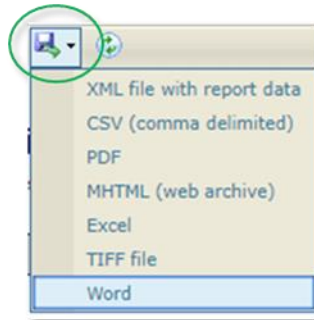


Figure 6 Report Download Formats

4. Select an option to download the report file to your computer.
5. Use your computer's print options to print the report

2 HOW DO I START WITH PRIMEROEDGE?

You must first open your browser. There are a number of ways to reach the browser.



Figure 7 Computer Screen

1. If you are using Windows 10 or later, go to the lower left corner of your screen.
2. Click the bottom left start button.
3. Open the file folder marked *Windows Accessories*.
4. Click *Internet Explorer* from the list of programs.

Alternatively, there may be browser icons (pictures) along the bottom of your computer screen or middle of your computer screen. Clicking on one of these will also open your browser.



Figure 8 Browser Icons – Google, Firefox, Internet Explorer and Safari

There are various browsers available today. If you do not find a browser on your computer, check with your IT (Information Technology) department representative.

2.1 PRIMEROEDGE URL

To get to PrimoEdge, go to the **URL** (Uniform Resource Locator also known as a web address) box on your internet browser. The browser box is at the top of your computer screen when your browser is open.

Below is an example of a PrimoEdge URL.

▲ Go to the address provided by your trainer or administrator.



Figure 9 Browser Box and URL

1. Type the address provided by your trainer or administrator. The following address is an example to type <https://online.primeroedge.com> into the URL box.
2. Press the **Enter** key on your computer keyboard.

▲ Do not use the **Search Box** to enter the address <https://online.primeroedge.com> !

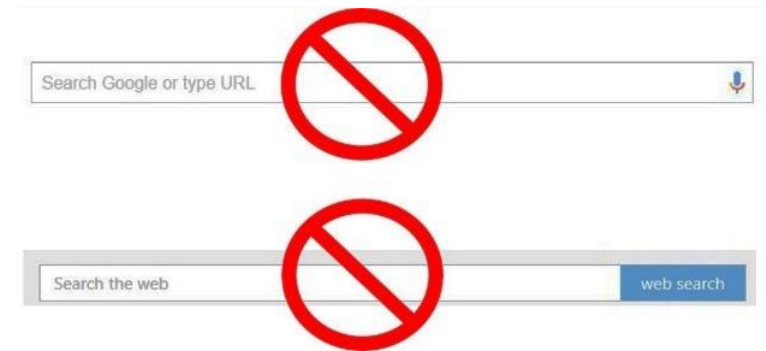


Figure 10 Do Not Use Search Box for URL

2.2 HOW DO I CREATE A BOOKMARK?

✓ Once you have typed the address www.online.primeroedge.com into your **URL**, you can create a bookmark or favorite. The bookmark bar is at the top of your browser screen. Bookmark your frequently used pages.

Press the two keys, **Ctrl D**, on your keyboard to create a bookmark.



Figure 11 Ctrl D Keys

Your browser may ask you where to put the bookmark. In the **Bookmark Box** marked **Folder**, Select **Bookmarks Bar** by clicking on the inverted triangle. Click **Done**.

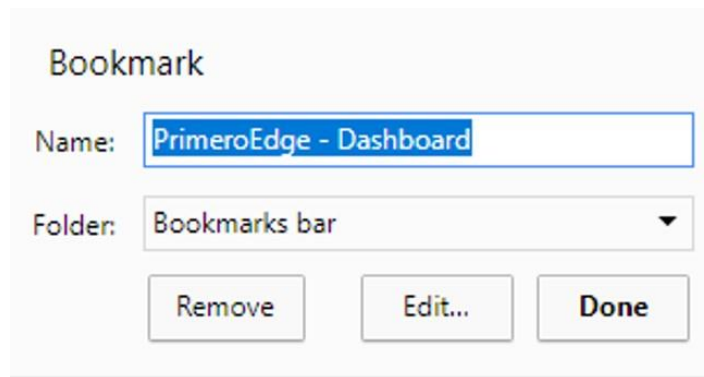


Figure 12 Bookmark Box

Getting to PrimeroEdge is much easier! There is now a **PrimeroEdge Bookmark** in your **Bookmarks Bar**.

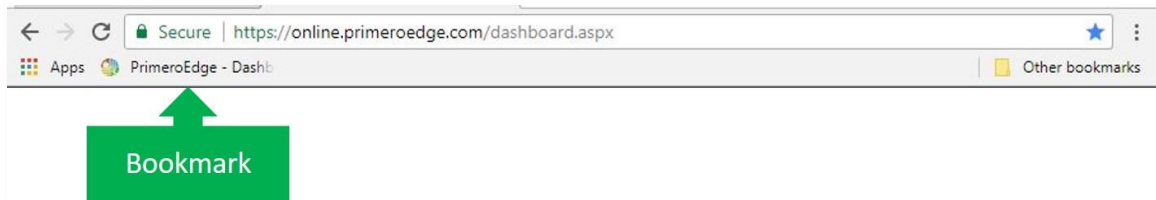


Figure 13 Bookmarks Bar

Opening the same browser now includes a bookmark to PrimeroEdge. Click on the **PrimeroEdge** icon in your **Bookmark** bar to return to the **PrimeroEdge Login** box.

2.3 PRIMEROEDGE ICON

You can also access PrimeroEdge from your computer screen. Look at your computer screen (desktop) to see if there is a **PrimeroEdge** icon (picture). If there is a **PrimeroEdge** icon, double-click it to open the login box. If there is no icon, use the previous instructions to go to the **PrimeroEdge Login** box.

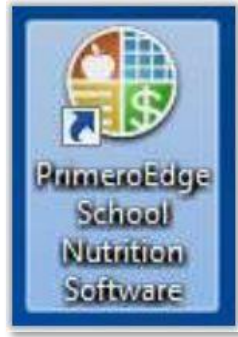
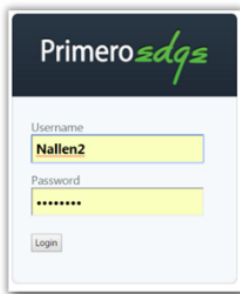


Figure 14 PrimeroEdge Icon

2.4 LOGIN



Use your assigned Username and Password to complete the login box. If you do not have a Username or Password, speak with your Supervisor.

Figure 15 Login

2.5 HOME SCREEN

Note the locations from left to right for the **Amigo**, **District Realm**, **Dashboard**, **Messages**, **My Profile** and **Logout**.

- If your screen does not contain **District Realm**, move to the next tab available.
- Your screen may have a different number of **Modules** and **Categories** depending upon your role.



Figure 16 Modules and Categories

Hidden within the **Categories** are the **Functional Areas**.

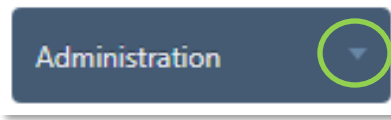


Figure 17 Category Button

Open the **Functional Areas** by clicking once on the inverted triangle ▼ on each **Category** button. Click the triangle again to close the **Functional Areas** list.

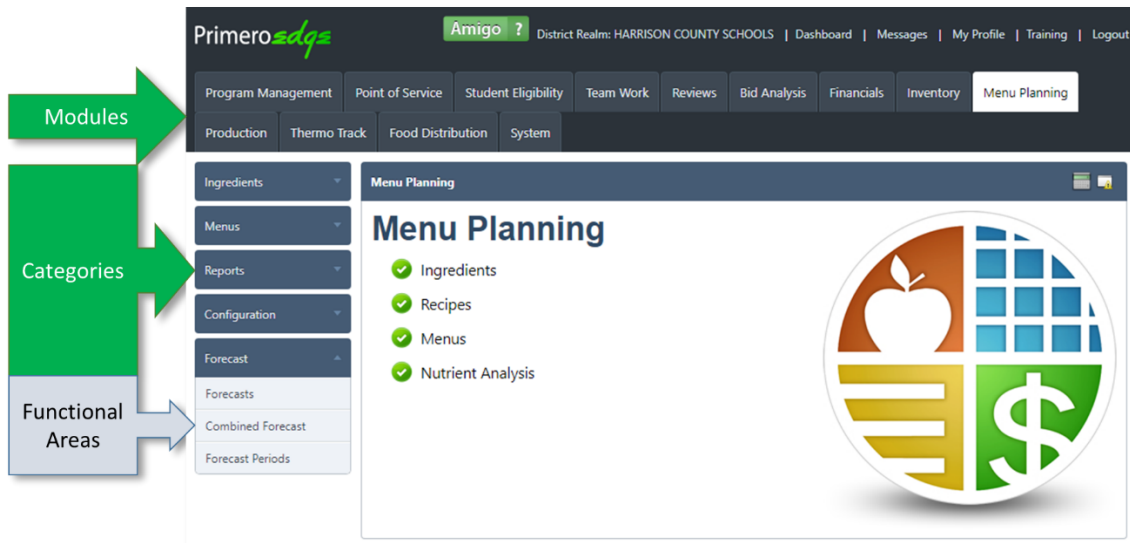


Figure 18 Functional Areas

2.6 SCREEN ICONS

Below is a list of screen icons you may see in PrimeroEdge. Each icon helps you complete various actions or delivers information regarding a process.



















PrimeroEdge Icons		
Icon	Name	Function
	Red Thumbtack	Click to add or view Notes
	Yellow Triangle	Scroll over to view a note or an issue to address
	Pencil	Click to type or edit
	Three Dot Box	Click to lookup an item
	Recycle bin	Click to delete an item
	Green Cycle Arrows	Click to refresh your screen. Reload or update display
	Amigo	Click to open help
	Information	Click for an informational note
	Calendar	Click to open a calendar
	Blue Cycle Arrows	Indicates an activity is in process
	Green Circle Check	Indicates synchronized data
	Filter	Click to sift through data to pull just what you need
	Star or Asterisk	Indicates a required item
	Clipboard	Click to review task notes
	Quote Bubble	Click to add comments
	Green Checkmark	Successful data entry
	Red 'X'	Delete or cancel an item
	X	Click to close the window

Table 1 PrimeroEdge Icons

2.7 ERROR, SUCCESS AND OTHER SYSTEM NOTES

A red, green or blue box may appear on your screen following an input or procedure. A red box contains notes regarding incorrect or missing information.



Figure 19 Red Box – Unsuccessful Process

A green box indicates the successful completion of a process.

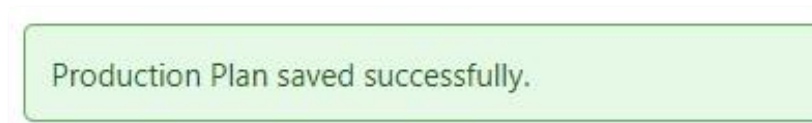


Figure 20 Green Box - Successful Process

The blue box contains helpful information regarding the status of a process.



Figure 21 Blue Box - Process Status

Data entry boxes are white. A gray box is unavailable for data entry. You cannot enter data into a gray box.



Figure 22 White and Gray Boxes

3 DISTRICT REALM

Login to PrimeroEdge. The landing or home screen opens. Click on **District Realm**.

- If your screen does not contain **District Realm**, move to the next tab available.

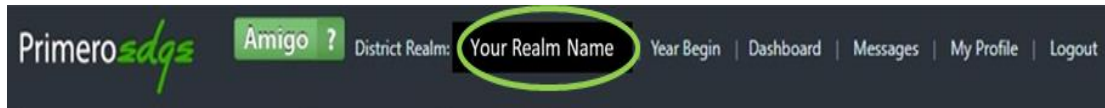


Figure 23 Landing Screen Top

The **District Realm** selection at the top of the landing screen contains selections for your location. Select the applicable **Login Realm** in your **Login Location**.

- ▲ Some **Modules**, **Categories** and **Functional Areas** may only be visible in the **Central Realm**. Ensure that you are operating from the correct **Realm**. Confer with your supervisor and/or PrimeroEdge contact regarding **Realm** access questions.

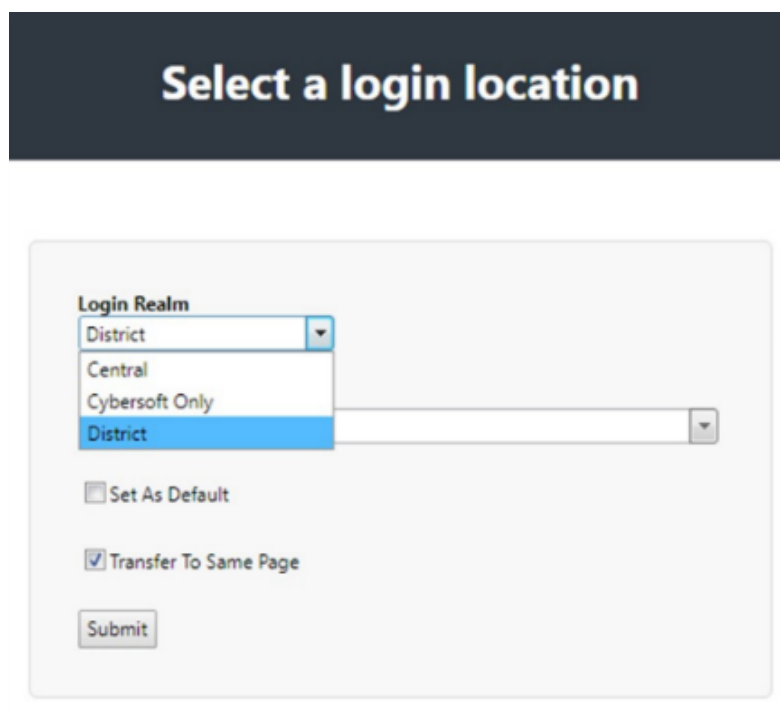


Figure 24 Login Location

Following the **Login Realm** selection, select the **Login Region**.

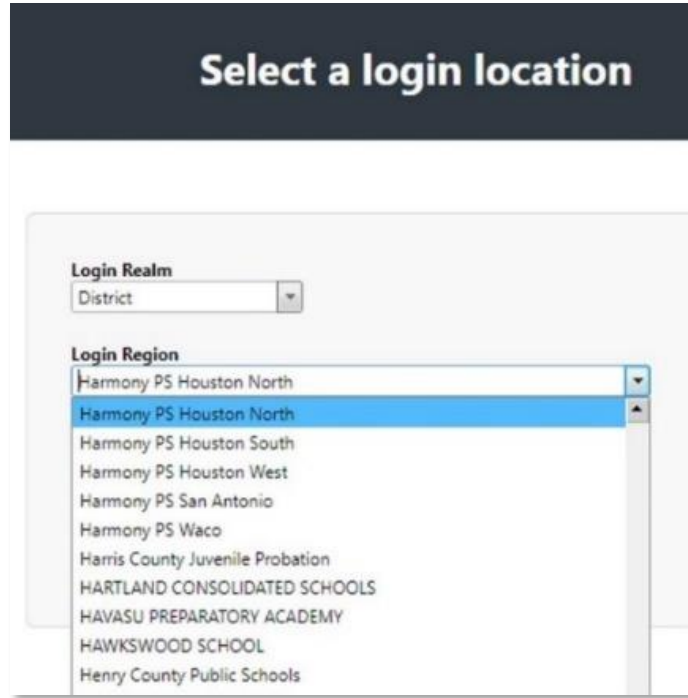


Figure 25 Login Location

The **Login Region** list depends upon the **Login Realm** selected.

4 DASHBOARD

The **Dashboard** contains customized announcements and messages. Opening these requires clicking on the underlined text (hyperlink), for example *Order Deadlines*, *Order # 10129*.

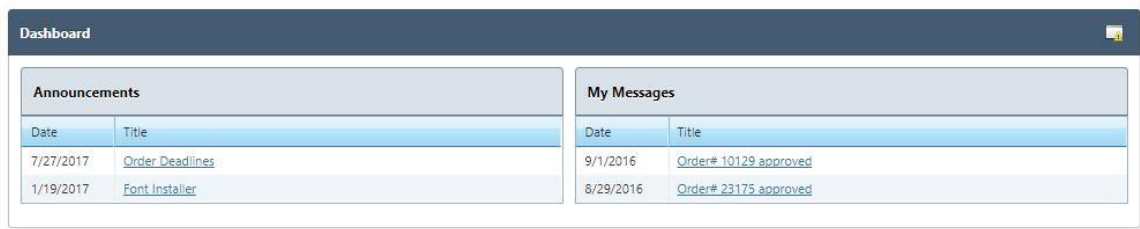


Figure 26 Dashboard

4.1 VIEW MESSAGES

The **View Messages** screen is similar to the **Dashboard**. **My Messages** contains customized announcements and messages.



Figure 27 My Messages

In **View Messages**, edit a message by clicking on the **Pencil** icon. Click the **Waste Basket** icon for message deletion.

Some announcements and messages may contain additional links. See the following example for and note the hyperlink. Selecting the **Font Installer** link in **Announcements** opens a box to *Click Here to install the necessary fonts for printing barcodes and viewing other special characters.*

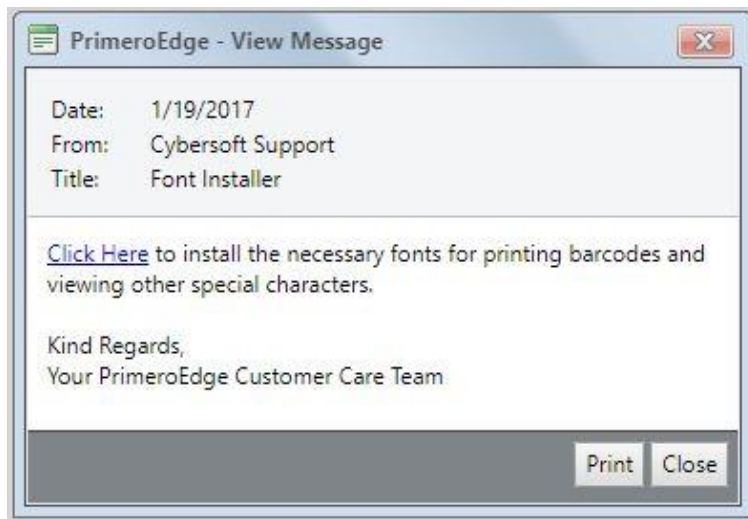


Figure 28 Announcements - Font Installer

Click the **Print** or **Close** button at the bottom, right-hand corner of the box. In Figure 32, **My Messages** contains two links labeled **Order# 10129** and **Order# 23175**. Clicking on the link **Order# 10129** opens the following message.

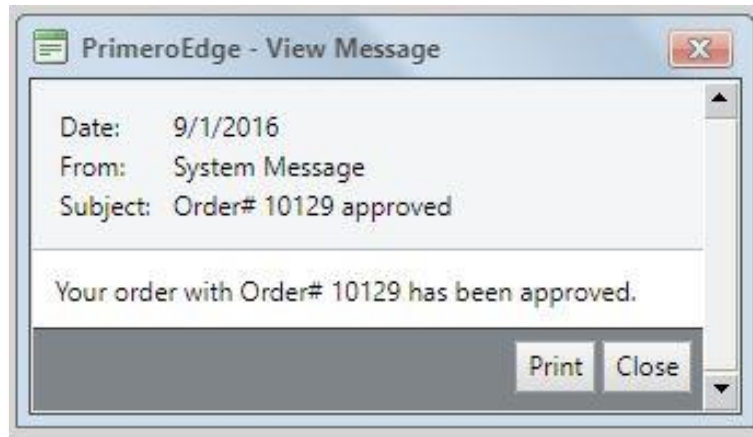


Figure 29 My Message - Order# 10129

- Note you can write and share announcements from **System > Administration > Announcements**, if you are authorized.

4.2 MY PROFILE

PrimerosEdge works with your administration to complete this screen for you. The **My Profile** screen provides an opportunity to update your User Profile and/or a Password if authorized.

Select the **Save** button when updating your data. An asterisk marks required data.

The screenshot shows a web interface titled "My Profile" with a "User Info" tab. It is divided into two main sections: "User Profile" and "Password".

User Profile Section:

- Username *:
- First Name *:
- Last Name *:
- Middle Initial:
- Email:
- Work Phone:
- Cell Phone:
- User Status: Active
- Language: ▼
- Theme: ▼

Password Section:

- Old Password:
- New Password:
- Confirm Password:

A "Save" button is located at the bottom right of the form.

Figure 30 My Profile Screen

- ▲ **My Profile** creation is not possible without a **Username, First Name** and **Last Name**.
- ▲ Boxes unauthorized for edits appear gray.

5 OTHER DISPLAY CONTROLS






There are many types of screen controls. The following display control example is taken from the **System > Sites and Users > Sites** page but is applicable to any page with similar controls.

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

Alpha controls:

- Click a letter button to see all listings whose **SFA Name** begins with the clicked letter.

Page controls:

- To change the number of listings displayed on a page, select a number in **Page size**.
- To display the last page of listings, click .
- To display the next page of listings, click .
- To display a specific page of listings, click number button such as .
- To display the previous page of listings, click .
- To display the first page of listings, click .

Site Code	Site Name	Site Type	SBP	ASP	Status
001	001 HS	High Schools			Active
003	003 HS (4473)	High Schools			Active
005	005 HS	High Schools			Active
006	006 High School	High Schools			Active
010	010 District Alternate Education ELEMENTARY SCHOOL	Elementary Schools			Active
012	012 School of Choice	High Schools			Active
014	014 AIS Middle	High Schools			Active
015	015 HGH	High Schools			Active
038	038 Education Center	High Schools			Active
041	041 MS	Middle Schools			Active

Figure 31 Display Controls

6 AMIGO



Amigo is a help tool that assists you while you are using PrimeroEdge. Click the **Amigo** icon at the top of the page to open it.

Figure 32 Amigo Icon

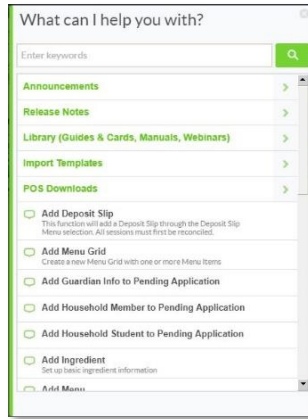


Figure 33 Amigo Search Box

Amigo contains resources related to a number of topics. The types of resources include:

- **Announcements:** These timely notices such as the *Year End/Begin Information 2017/2018* help plan for the upcoming school year.
- **Release Notes:** Did you find an error on a PrimeroEdge screen? Notify your PrimeroEdge representative. Your correction may appear in **Release Notes** to notify others. Updates appear in **Release Notes** to keep you informed.
- **Library (Guides & Cards, Manual, Webinars):** Find flyers, checklists, videos, letter templates, recorded webinars and more in the **Library**.
- **Import Templates:** This area contains helpful files and templates such as *Ingredient Import File*, *Ingredient Linking File*, *User Import File* and *Import Instructions*.
- **POS Downloads:** Point of Service (POS) Downloads include *PrimeroEdge Cashier*, *PrimeroEdge Trainer*, *PrimeroEdge POS Cashier Setup Guide* and *PrimeroEdge Trainer Setup Guide* among others.



Figure 34 Library Item Samples

- **Stepwise Task Tool:** This **Amigo** feature points the way to each step in a task.

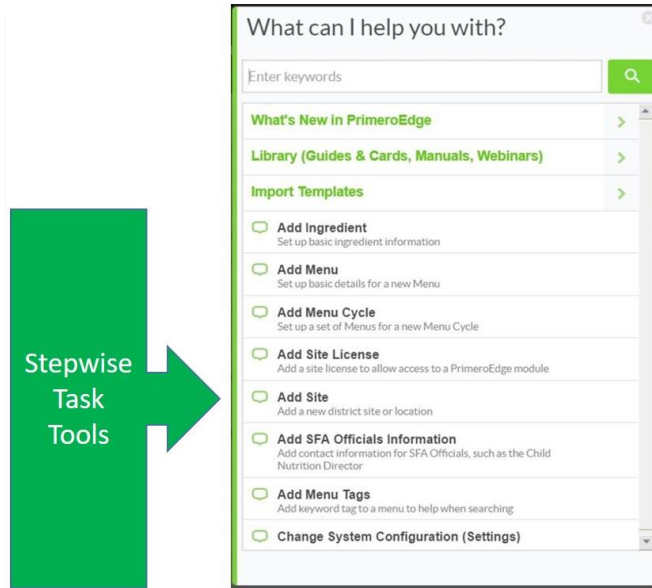



Figure 35 Stepwise Task Tool

Indicated by a quote bubble , the stepwise task tools are for common tasks. **Add Ingredient** is the task selected in the following example. Click on **Add Ingredient** and a **Menu Planning** task box appears.

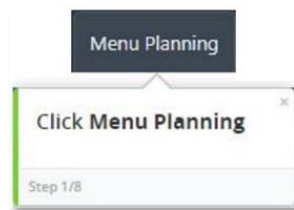


Figure 36 Amigo Menu Planning Task Tool

The **Amigo Menu Planning** task tool leads you through eight steps. Note the **Step 1/8** in the bottom, left corner of the box. Close the boxes by clicking on the **X**. The number of steps vary according to the task selected. Each box includes instructions and appears next to each of your task steps.

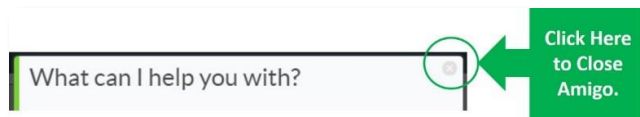


Figure 37 Amigo Exit

To close **Amigo** search boxes, click the **X** in the upper right hand corner.

7 LOGOUT

You can logout of PrimeroEdge from any page by selecting **Logout** at the top right corner.

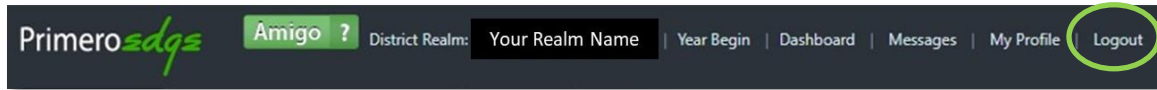


Figure 38 Logout

Successfully logging out produces the green message in the **Login** box, *You have been successfully logged out of PrimeroEdge.*

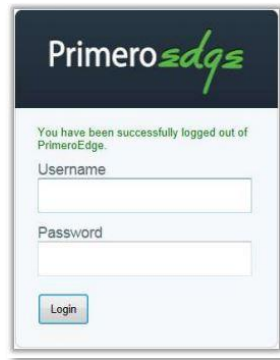


Figure 39 Logout Success Message

8 I NEED MORE HELP!

Remote assistance allows PrimeroEdge representative to view your screen from a remote distance. If an issue occurs that requires direct support use the following contact information for direct support including remote assistance.

8.1 CONTACT INFORMATION

For a PrimeroEdge question, call 866-442-6030. Your call is important to us but we may already be on the phone helping one of your coworkers!

Email us at, success@primeroedge.com. Be sure to include your name, district name, phone number and a description of your issue.

8.2 REMOTE ASSISTANCE

Remote Assistance is available if you want to share a view of your screen with a PrimeroEdge representative.

▲ You must speak with a PrimeroEdge representative at the same time you use **Remote Assistance**.



Figure 40 Remote Assistance URL

1. Enter the address <http://help.primerioedge.com> into the URL.
▲ Do not use “www” when typing the **Remote Assistance** address.
2. Press the **Enter** key on your computer.
3. Type your name in the box marked **Your Name**.
4. Type the code provided by your PrimerioEdge representative into the **Enter Code** box.
▲ No **Enter Code**—no **Remote Assistance**.
5. Click the **X** at the top right of your browser screen to exit **Remote Assistance**.

9 WHAT'S NEXT?

You have completed **Navigating PrimeroEdge**! 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 — NAVIGATING PRIMEROEDGE KNOWLEDGE CHECK

Test your **Navigating PrimeroEdge** knowledge with the following questions. Answers are at the bottom of the page.

1. Name the three components that divide PrimeroEdge software.
2. List the seven types of file download formats.
3. You cannot type in a _____ box.
4. Name three types of help provided by the **Amigo** help tool.
5. True or False – You can use **Remote Assistance** without a computer.

Answers

1. **Modules, Categories, Functional Areas**
2. xml, csv, pdf, MHTML, Excel, tiff, Word
3. Gray
4. Announcements, Release Notes, Library, Import Templates, POS Downloads, Stepwise Task Tools
5. False, while assistance is available, Remote Assistance requires a view of your computer screen

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 Configuration	Central Office, Warehouse Managers and Supervisors	Central Warehouse
Central Warehouse	Central Office, Warehouse Managers and Supervisors	
Central Warehouse Q & A	Central Office, Warehouse Managers and Supervisors	
Structure Menu Planning	Central Office, Menu Planner	Structured Menu Planning
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	
Configuration Training	Central Office, Menu Planner	Flexible Menu Planning
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 Pre-Training (Optional)	Central Office, Menu Planner, Nutrition Staff	Production
Production Training	Central Office, Menu Planner, Nutrition Staff	
Central Production Configuration	Central Office, Nutrition Staff	Central Production
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 Administration Training	Central Office, Managers, Supervisors	Bid Analysis
Bid Analysis Q & A	Central Office, Managers, Supervisors	
Teamwork	Central Office, Managers, Supervisors, Training Manager	Teamwork
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

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

General Comments:

10 GLOSSARY

TERM	DEFINITION
À la carte	Foods and beverages sold separately from reimbursable meals in the USDA school nutrition programs.
Agency Code	National and state files containing Department of Education local education agency codes for school districts are available at www.census.gov
Approving Official	The person responsible for collecting, evaluating, and processing meal benefits applications.
Assistance Programs	<p>Receipt of benefits by any household member from certain Assistance Programs conveys categorical (automatic) eligibility for free school meals to all children in the household. The determination is made through direct certification for Assistance Programs or through an application with appropriate case numbers. The Assistance Programs are:</p> <ul style="list-style-type: none"> • Supplemental Nutrition Assistance Program (SNAP) • Food Distribution Program on Indian Reservations (FDPIR) • Temporary Assistance for Needy Families (TANF)
Automated Data Matching	<p>The most common direct certification method used to directly certify students. Matches are made between student enrollment records and benefit recipient records from Assistance Programs (SNAP, TANF, or FDPIR), foster care agencies, or other appropriate State or local agencies to establish categorical eligibility (Head Start, Migrant Education Program, and runaway and homeless programs). There are two common automated data matching processes: 1. Local or LEA-level: The State agency distributes SNAP, TANF, foster care, and other relevant data to the LEA and the LEA matches the data to the children’s enrollment records; or 2. State or central-level matching: The State agency is responsible for a system that matches a list of children enrolled in schools in the NSLP with a list of children receiving SNAP benefits, and then provides relevant information to the LEA to process at the local level.</p>
Broken Unit	Smaller units of the stock item within the whole unit. Items typically used in production are broken units.
CACFP	Child and Adult Care Food Program: The U.S. Department of Agriculture has federally assisted meal program providing nutritious meals and snacks to children in childcare centers, family day care homes and emergency shelters and snacks and suppers to children participating in eligible at-risk afterschool care programs.
Carryover of Eligibility	A child’s eligibility from the previous school year, carried into the current school year for up to 30 operating days, beginning on the first operating day of school.

<p>Case</p>	<p>Describes the way multiple physical units of the same item are packaged. Whole units or cases are typical for orders.</p>
<p>Cash</p>	<ul style="list-style-type: none"> • Cashier: total amount of all cash entered by the cashier during Close POS procedure. • System: total of all cash recorded by the system during the session. • Over/Under: difference between cashier and system cash amounts.
<p>Categorical Eligibility</p>	<p>Children automatically eligible for free meals or free milk because they, or any household member, receive benefits under Assistance Programs; or they are designated as members of Other Source Categorically Eligible Programs. There are two ways children may be classified as categorically eligible:</p> <ol style="list-style-type: none"> 1. Participation in Assistance Programs: A child or any member of the household receives benefits from SNAP, FDPIR, or TANF, as determined either through direct certification or an application with the appropriate case number; or 2. Other Source Categorically Eligible designation: A child is documented as meeting the applicable definition, as defined in this section, as: <ol style="list-style-type: none"> a. Homeless, runaway, or migrant; b. A foster child; or c. Enrolled in a federally-funded Head Start or comparable State-funded Head Start or pre-kindergarten program. <p>An individual child’s eligibility for free benefits under any of the Other Source Categorically Eligible Programs does not convey to other children in the household. Except for a foster child, the household indication of Other Source Categorically Eligible status must be confirmed through documentation prior to certifying the child’s eligibility for free meals.</p>
<p>Checks</p>	<ul style="list-style-type: none"> • Cashier: total amount of all checks recorded during Close POS procedure. • System: total amount of all checks recorded by the system during the session • Over/Under: difference between cashier and system check amounts
<p>CN Label</p>	<p>Child Nutrition Label: A statement that clearly identifies the contribution of a food product toward the meal pattern requirements, based on the USDA’s evaluation of the product’s formulation.</p>
<p>Confirming Official</p>	<p>Also referred to as an Application Confirmation Official; a determining official, other than the Approving Official, who reviews each approved application selected for verification to validate the initial determination. If a computer software program</p>
<p>County</p>	<p>In the United States, a county is an administrative or political subdivision of a state, which is a region having specific boundaries and usually some level of governmental authority.</p>

Cycle Counting	The process of counting portions of the inventory on a periodic basis without counting the entire warehouse’s inventory at once.
Determining Official	An LEA official responsible for determining children’s eligibility for free or reduced price benefits.
Determining Official	An LEA official responsible for determining children’s eligibility for free or reduced price benefits.
Determining Official	A determining official, other than the Approving Official, who reviews each approved application selected for verification to validate the initial determination.
Direct Certification	Determining children eligible for free benefits based on documentation obtained directly from appropriate State or local agencies or other authorized individuals. Direct certification of a child’s eligibility status should not involve the household. The communication exchange should be between an appropriate agency and the State agency, LEA, or school.
Direct Certification for Assistance Programs	A process conducted through an electronic match between the Assistance Program and the State agency or LEA. No application is necessary. Letters from TANF and FDPIR agencies submitted by households are considered direct certification. However, direct certification for SNAP households must be conducted using an automated data match process. If a household provides a SNAP eligibility letter to the LEA or school, the letter must be used to establish eligibility, but it is not considered direct certification for reporting purposes.
Direct Certification for Other Source Categorically Eligible Programs	A process conducted through an automated data match between appropriate State or local agencies and officials from Other Source Categorically Eligible Programs, such as the LEA’s homeless liaison. Direct certification may also be conducted using lists of eligible children provided to the State or LEA from appropriate officials of these programs. Letters and contacts from officials of these may also be used as direct certification.
Direct Verification	The use of public records as a means to verify children’s eligibility for free or reduced price benefits. Direct verification may be conducted with SNAP, FDPIR, or TANF agencies or appropriate officials of Other Source Categorically Eligible Programs to confirm eligibility for free meals. Direct verification with Medicaid or the State Child Health Insurance Program (SCHIP) may confirm eligibility for either free or reduced price meals, depending on the Medicaid or SCHIP eligibility criteria in the State.
DRI	Dietary Reference Intake: A set of nutrient-based reference values that expand upon and replace the former Recommended Dietary Allowances (RDAs) in the United States.
Extension of Categorical Eligibility for	Any one child or household member’s receipt of benefits from an Assistance Program extends eligibility for free benefits to all children who are members of the household.

Assistance Programs	
FIFO	First In First Out, Inventory valuation method where older stock items receive priority for use. This is a health and safety consideration to avoid using expired or unsafe items.
FNS Regional Offices	The United States Department of Agriculture Food and Nutrition Service is divided into seven regional offices which are the Mid-Atlantic Regional Office (MARO), Midwest Regional Office (MWRO), Mountain Plains Regional Office (MPRO), Northeast Regional Office (NERO), Southeast Regional Office (SERO), Southwest Regional Office (SWRO) and the Western Regional Office (WRO).
Foster Child	An Other Source Categorical Eligibility Program designation for a child who is formally placed by a court or a State child welfare agency. This definition does not apply to informal arrangements or permanent guardianship placements that may exist outside of State or court-based systems.
Free Meal	A meal served in NSLP or SBP to a child eligible for such benefits under 7 CFR Part 245. Neither the child nor any member of the household pays or is required to work in the school or in the school’s food service to receive a free meal.
Free Milk	Milk served in the SMP to a child eligible for free milk under 7 CFR Part 245. Neither the child nor any member of the household pays or is required to work in the school or in the school’s food service to receive free milk.
FSMC	Food Service Management Companies
Grace Period	This period allows the student nutrition service at the previous school year status to allow families time to submit a current school year application. Some districts use this graced benefit for less than or equal to 30 schools days.
HACCP	Hazard Analysis and Critical Control Points; it is a management system in which food safety is addressed through the analysis and control of biological, chemical and physical hazards from raw material production, procurement and handling, to manufacturing, distribution and consumption of the finished product.
Head Start	An Other Source Categorical Eligible Program, which refers to Federal Head Start and any State-funded pre-kindergarten program that use eligibility criteria that are identical or more stringent than Federal Head Start.
Hearing Official	A person, not connected to the application approval or verification process, who implements the hearing process should there be an appeal.
Homeless	An Other Source Categorical Eligible Program designation for a child who is identified by the LEA homeless liaison or by an official of a

	homeless shelter as lacking a fixed, regular, and adequate nighttime residence.
Household	A group of related or nonrelated individuals who are living as one economic unit. The term “family” has the same definition as “household” under 7 CFR Part 245.2.
IEGS	Income Eligibility Guidelines; The family-size income levels prescribed annually by the Secretary of Agriculture for determining eligibility for free and reduced price meals and free milk. The free guidelines are at or below 130 percent of the Federal poverty guidelines. The reduced price guidelines are between 130 and at or below 185 percent of the Federal poverty guidelines.
Inventory	The collection of ingredients, foods, or supplies a school or district warehouse stores for use in food production and subsequent sale to students.
Inventory management	The processes of procuring, tracking, and managing inventory stock with the purpose of getting the right quantity of the needed items to the right place at the right time.
Item	Refers to a specific item in a specific unit of measure. Also known as SKU or Stock Keeping Unit.
LEA	<p>Local Education Agency (LEA) refers to:</p> <ul style="list-style-type: none"> • A public board of education or other public or private nonprofit authority legally constituted within a State for the administrative control of public or private nonprofit schools in a political subdivision of a State; • An administrative agency or combination of school districts or counties recognized by the State; • Any other public or private nonprofit institution or agency having administrative control and direction of public or private nonprofit schools or residential child care institutions; or • The State educational agency that, in any State or territory, serves as the sole educational agency for all public or private nonprofit schools. <ul style="list-style-type: none"> ○ An employee of the food service management company may act as an agent for the LEA in various aspects of the application, certification, and verification processes. ○ The company’s employee must comply with all requirements for these processes, including limited disclosure of individual eligibility information. ○ However, the LEA is ultimately responsible for ensuring that all requirements are being met and that the information on the application remains the property of the LEA and cannot be used or possessed by the food service management company for any use other than to determine eligibility for free and reduced price meals

Lead Time	The amount of time required for an item to be available for use from the time it is ordered. Lead-time should include order approval and submission, vendor order processing time, vendor delivery schedules, receiving, inspection, etc.
LEP	Limited English Proficiency; A limited ability to read, speak, write, or understand English. Recipients of Federal financial assistance have a responsibility to take reasonable steps to ensure meaningful access to their programs and activities by persons with limited English proficiency.
Migrant	An Other Source Categorical Eligibility designation for a child who is enrolled in the Migrant Education Program (MEP) as determined by the State or local MEP coordinator.
Mixed Household	Those households that include children designated as Other Source Categorically Eligible as well as other children who are not.
Moving Average Cost	Inventory valuation method that recalculates the cost of an item at each receipt by averaging the actual cost of the receipt with the cost of the current inventory.
Negative Inventory	A condition whereby the quantity on hand is less than zero. This is a valid condition in a software system and can happen due to the timing of activities in receiving and withdrawing stock, or other inventory processes.
Noncreditable foods	Foods and beverages that cannot credit toward the NSLP and SBP meal patterns.
NSLP	National School Lunch Program; the USDA’s federally assisted meal program operating in public and nonprofit private schools and residential childcare institutions.
Operating Days	The days on which a meal or milk is provided.
Order	An order communicates the purchase to the vendor. It lists the items, quantities, prices; delivery location and delivery date to the vendor. The order is also used to process and track receipts and vendor invoices/payments associated with the purchase.
Other Source Categorically Eligible	Categories which make children automatically eligible for free benefits, either through direct certification or application. A child’s eligibility for free benefits under Other Source Categorical Eligibility does not extend to any other child in the household. A child is Other Source Categorically Eligible if the child is: <ul style="list-style-type: none"> • Enrolled in Federal Head Start; • Enrolled in State-funded pre-kindergarten programs that use eligibility criteria that are identical or more stringent than Federal Head Start;

	<ul style="list-style-type: none"> • Determined to be homeless by the LEA’s homeless liaison or by an official of a homeless shelter; • Determined to be a migrant by the State or local MEP coordinator or homeless liaison; • Determined to be a runaway who is identified by the local education liaison as receiving assistance through a program under the Runaway and Homeless Youth Act; • Determined to be a foster child whose care and placement is the responsibility of the State, or who is formally placed by a court with a caretaker household through which the State retains legal custody of the child.
Overt Identification	<p>Any action that may result in a child being recognized as potentially eligible to receive or be certified for free or reduced price school meals or free milk. LEAs and SFAs must assure that a child’s eligibility status is not disclosed at any point in the process of providing free or reduced price meals or free milk, including:</p> <ul style="list-style-type: none"> • Notification of the availability of free or reduced price benefits; • Certification and notification of eligibility; • Provision of meals in the cafeteria; • Point of service; • Provision of additional services, such as educational services to low income children; or • Method of payment.
Perpetual Inventory	Process of matching records of expected QoH inventory counts with actual physical counts of tangible inventory.
Physical Inventory	The process of counting the entire inventory in a school or central warehouse in a single event.
PO	Purchase Order: a purchase order is a document used to authorize, approve, track, and process purchases.
POS	Point of Service meal count: the point in the food service operation where staff can accurately determine that a reimbursable free, reduced-price or paid lunch served to an eligible child.
Production record	A working tool that outlines the type and quantity of foods used to prepare school meals.
QoH	Quantity on Hand: quantity of the stock item in your warehouse or school.
Quantity Available	Quantity of the stock item that is uncommitted and available for production or distribution.
Quantity Committed	Quantity of the stock item that is currently committed for production or distribution; does not have to be physically in inventory
Quantity on Order	Quantity of the stock item that has been ordered but not yet received and has not been added to stock

<p>RCCI</p>	<p>Residential Child Care Institution (RCCI); any distinct part of a public or nonprofit private institution that:</p> <ul style="list-style-type: none"> • Maintains children in residence; • Operates principally for the care of children; and • If private, is licensed by the State or local government to provide residential childcare services under the appropriate licensing code. <p>12 The definitions of “School” and “Child” under 7 CFR 210.2, 215.2 and 220.2, outline the requirements for eligible RCCIs and eligible residents.</p>
<p>Receipt</p>	<p>The process of receiving the ordered items. In an inventory management system, this step adds the received goods to inventory thereby incrementing the Quantity on Hand.</p>
<p>Reduced Price Meal</p>	<p>A lunch priced at 40 cents or less, an afterschool snack priced at 15 cents or less, or a breakfast priced at 30 cents or less, served to a child certified as eligible for such benefits under 7 CFR Part 245.</p>
<p>Reimbursable meals</p>	<p>Meals or snacks that meet the requirements of the USDA regulations for Child Nutrition Programs.</p>
<p>Runaway</p>	<p>An Other Source Categorical Eligibility designation for a runaway child who is identified by the LEA’s homeless liaison or a program official as receiving assistance from a program under the Runaway and Homeless Youth Act.</p>
<p>School Foodservice Nutrition Directors, Executive Director, Supervisor, Coordinator</p>	<p>In most school districts, the foodservice/nutrition director oversees all aspects of foodservice in all schools or sites, administering the school meal program in accordance to local, state and federal policies. The director reports to the superintendent, and in some districts, the director may act as an assistant superintendent with responsibilities unrelated to foodservice.</p>
<p>School Foodservice Nutrition Employee, Assistant, Technician, Cook, Cashier</p>	<p>School foodservice employees in an individual school are responsible for the preparation and serving of all menu items. Additional responsibilities include cleaning and dishwashing, as well as the care of some equipment. Employees in cafeterias and kitchens include cooks, bakers, dishwashers and cashiers. School nutrition employees also may work at the district level as bookkeepers, secretaries, drivers and production/warehouse facility workers.</p>
<p>School Foodservice Nutrition Manager, Assistant Manager, Head Cook, Lead</p>	<p>Managers lead the day-to-day operations at an individual school or feeding site. Foodservice managers must ensure high standards for safety/sanitation and meal quality. In addition, they supervise site employees, place food/supply orders, account for meal service and a la carte sales and ensure adequate inventory is available.</p>

School Foodservice Nutrition Supervisor, Assistant Director, Field Manager, Specialist, Dietitian, Executive Chef	Larger school districts that require greater central management may have supervisory staff who support the director. These individuals may oversee procurement, financial administration, menu planning, recipe development, nutrition education, wellness coordination, catering/vending operations, production facility or warehouse management, training coordination or more. Supervisors may also oversee several individual service sites.
School Year	The period from July 1 through June 30
SFA	School Food Authority; the governing body, which is responsible for the administration of one or more schools; and has the legal authority to operate child nutrition programs therein or otherwise approved by USDA to operate the Program.
SKU	Stock Keeping Unit; also known as an item.
TANF	Temporary Assistance for Needy Families; a Federal designation for a State funded program under part A of title IV of the Social Security Act. Each State has its own name and acronym for the program. Categorical eligibility for free benefits is limited to beneficiaries in States with TANF standards that are comparable to or more restrictive than those in effect on June 1, 1995. See SP-22- 2010, CACFP 10-2010, SFSP 08-2010: Categorical Eligibility—Temporary Assistance to Needy Families, http://www.fns.usda.gov/sites/default/files/SP_22-2010_os.pdf .
Total	<ul style="list-style-type: none"> • Cashier: total closing amount of cash and checks calculated by the cashier during close POS procedure. • System: total closing amount of cash and checks recorded by the system. • Over/Under: difference between cashier and system totals.
Transfer	The process of moving inventory from one school to another.
USDA	United States Department of Agriculture
Verifying Official	The person conducting the verification process. May be the same person as the Approving Official.
Whole Unit	Describes the way multiple physical units of the same item are packaged. Whole units or cases are typical for orders.
Withdrawal	The process of removing items from inventory for the purpose of production. This step reduces the Quantity on Hand in the inventory management system.
Working Days	The days when school is open and teachers or school administration are onsite, but the reimbursable meal service is not in operation.

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