

CYBERSOFT

# Primero *edges*

Cybersoft Technologies  
4422 FM 1960 W Suite 400  
Houston, TX 77068

[www.primerioedge.com](http://www.primerioedge.com)

 <http://facebook.com/primerioedge>

 <http://twitter.com/primerioedge>

*PrimerioEdge* Food Service Solutions  
*PrimerioEdge* Menu Planning User Manual

**Copyright © 2015 Cybersoft Technologies, Inc.**

**Software Version: 5.0**

All rights reserved. No part of this manual shall be reproduced, stored in a retrieval system, or transmitted by any means, electronic, mechanical, photocopy, recording, or otherwise, without the written permission from Cybersoft Technologies. No patent liability is assumed with respect to the use of the information contained herein. Although every precaution has been taken in the preparation of this manual, Cybersoft Technologies assumes no responsibility for errors or omissions.

**Disclaimer**

Every effort has been made to make this manual as complete and as accurate as possible, but no warranty or fitness is implied. The information provided is on an “as-is” basis. Changes made to the product may not be reflected in this manual.

Cybersoft Technologies shall have neither liability nor responsibility for any loss or damages arising from the use of information contained in this manual.

# Contents

<b>Quick View of Menu Planning.....</b>	<b>9</b>
Configuration .....	10
A <i>Set Up Data Sources and Meal Patterns</i> .....	10
B <i>Set Up Supporting Menu Details</i> .....	11
C <i>Configure Sites</i> .....	12
D <i>Select Standard Menu Items</i> .....	12
E <i>Create Menu Templates</i> .....	12
Ingredients, Recipes & Menu Items .....	13
Menus & Menu Cycles.....	14
Reports.....	15
Data Sources.....	16
<b>Section 2: Ingredients.....</b>	<b>17</b>
Ingredients at a Glance.....	18
Ingredients .....	19
<i>Searching for an Ingredient</i> .....	21
<i>Adding a New Ingredient</i> .....	22
<i>Tab 1: General</i> .....	23
<i>Tab 2: Nutrients</i> .....	24
<i>Tab 3: Allergens</i> .....	25
<i>Tab 4: Buying Guide</i> .....	26
<i>Tab 5: Labels</i> .....	27
<i>Generating an Ingredient List Report</i> .....	28
<i>Creating a Recipe from a Single Ingredient</i> .....	29
<i>Copying an Ingredient</i> .....	30
Recipes.....	31
<i>Searching for a Recipe</i> .....	33
<i>Adding a New Recipe</i> .....	34
<i>Tab 1: General</i> .....	35
<i>Tab 2: Ingredients</i> .....	36
<i>Tab 3: Nutrients</i> .....	38
<i>Tab 4: Menu Item</i> .....	40
<i>Tab 5: Allergens</i> .....	42
<i>Tab 6: Scale</i> .....	42
<i>Copying a Recipe</i> .....	44
<i>Working with Single Ingredient (SI) Recipes</i> .....	45
<i>Generating a Recipe Report</i> .....	47

Menu Items.....	48
<i>Searching for a Menu Item</i> .....	50
Purchase Items .....	51
<i>Adding a New Purchase Item</i> .....	53
<i>Creating a Link to a Stock Item</i> .....	54
<i>Adding an Ingredient Form to a Purchase Item</i> .....	55
<i>Updating Purchase Item Details</i> .....	56
<i>Deleting a Purchase Item</i> .....	57
<b>Section 3: Menus.....</b>	<b>59</b>
Menus at a Glance .....	60
Menus .....	61
<i>Searching for a Menu</i> .....	63
<i>Adding a Menu</i> .....	64
<i>Editing a Menu</i> .....	65
<i>Adding a Menu Item to a Menu</i> .....	67
<i>Deleting a Menu Item from a Menu</i> .....	68
<i>Changing Menu Item Serving Size</i> .....	69
<i>Changing Serving Groups for a Menu</i> .....	70
<i>Changing Menu Item Category Assignments for a Menu</i> .....	71
<i>Generating a Menu Costing Report</i> .....	72
<i>Viewing Menu Nutrients and Food Components</i> .....	74
<i>Generating the Menu Nutrient Analysis Report</i> .....	76
<i>Copying a Menu</i> .....	79
<i>Discontinuing a Menu</i> .....	80
Menu Cycles.....	81
<i>Searching for a Menu Cycle</i> .....	82
<i>Adding a Menu Cycle</i> .....	83
<i>Replacing a Menu in a Menu Cycle</i> .....	85
<i>Meat/Meat Alternate Grain Substitution</i> .....	86
<i>Viewing Menu Cycle Nutrients and Food Components</i> .....	87
<i>Generating a Menu Cycle Week Nutrient Analysis Report</i> .....	89
<i>Generating a Menu Cycle Week Nutrient Summary Report</i> .....	91
<i>Generating a Weekly Food Component Report</i> .....	92
<i>Copying a Menu Cycle</i> .....	94
<i>Discontinuing a Menu Cycle</i> .....	95
Assign Menus .....	96
<i>Assigning a Menu Cycle</i> .....	97
<i>Assigning a Menu</i> .....	103
<i>Replacing an Assigned Menu</i> .....	105
<i>Removing an Assigned Menu</i> .....	106

Multi-Line Analysis .....	107
<i>Generating a Multi-Line Analysis</i> .....	108
<i>Viewing Nutrients and Food Components for a Multi-Line Analysis</i> .....	109
<i>Generating a Nutrient Analysis Report with a Multi-Line Analysis</i> .....	111
<i>Generating a Nutrition Summary Report with a Multi-Line Analysis</i> .....	114
<i>Generating a Weekly Food Component Report with a Multi-Line Analysis</i> .....	116
Publish Menus.....	118
<i>Publishing Menus to Parent Online</i> .....	119
<b>Section 4: Reports .....</b>	<b>121</b>
Reports at a Glance .....	122
Acceptability Factor .....	123
<i>Generating an Acceptability Factor Report</i> .....	124
Allergen Chart .....	125
<i>Generating an Allergen Chart</i> .....	126
Ingredient List .....	127
<i>Generating an Ingredient List Report</i> .....	128
Menu Calendar .....	129
<i>Generating a Menu Calendar Report</i> .....	130
<i>Generating a Menu Calendar Nutrients Report</i> .....	131
Menu Item Nutrients .....	132
<i>Generating a Menu Item Nutrients Report</i> .....	133
Nutrient Standards.....	134
<i>Generating a Nutrient Standards Report</i> .....	135
Recipe Book .....	136
<i>Generating a Recipe Book</i> .....	137
Recipe Costing Report .....	139
<i>Generating a Recipe Costing Report</i> .....	140
Recipe Materials Report.....	141
Recipe Nutrition .....	143
<i>Generating a Recipe Nutrition Report</i> .....	144
Weekly Nutrient Analysis.....	145
<i>Generating a Weekly Nutrient Analysis Report</i> .....	146
<b>Section 5: Configuration .....</b>	<b>151</b>
Configuration at a Glance.....	152
Menu Item Categories .....	153
<i>Adding a Menu Item Category</i> .....	154
<i>Updating Category Details</i> .....	155

Menu Templates.....	156
<i>Searching for a Menu Template</i> .....	157
<i>Adding a Menu Template</i> .....	158
<i>Updating a Menu Template</i> .....	160
<i>Discontinuing a Menu Template</i> .....	161
<i>Activate a Discontinued Menu Template</i> .....	162
Standard Menu Items.....	163
<i>Adding a Standard Menu Item</i> .....	164
<i>Deleting a Standard Menu Item</i> .....	165
Menu Lines.....	166
<i>Adding a Menu Line</i> .....	167
<i>Updating a Menu Line Description</i> .....	168
Site Groups.....	169
<i>Adding Site Groups by Site Type</i> .....	170
<i>Adding a Site Group</i> .....	172
<i>Adding a Site to a Site Group</i> .....	173
<i>Updating Site Group Details</i> .....	174
<i>Updating Site Details</i> .....	175
<i>Deleting a Site in a Site Group</i> .....	176
<i>Deleting a Site Group</i> .....	177
Site Configuration.....	178
<i>Displaying Site Configuration Details</i> .....	179
<i>Configuring a Site</i> .....	180
<i>Updating Site Details</i> .....	181
HACCP Configuration.....	182
<i>Adding a HACCP Process</i> .....	183
<i>Updating a HACCP Process</i> .....	184
<i>Deleting a HACCP Process</i> .....	185
<i>Adding a Critical Control Point</i> .....	186
<i>Updating a Critical Control Point</i> .....	187
<i>Deleting a Critical Control Point</i> .....	188
Holiday Schedule.....	189
<i>Adding a Holiday</i> .....	190
<i>Updating Holiday Details</i> .....	191
<i>Deleting a Holiday</i> .....	192
Meal Pattern.....	193
<i>Displaying Meal Pattern Details</i> .....	194
<i>Updating Meal Pattern Basis</i> .....	195
<i>Deleting a Serving Group from a Meal Pattern</i> .....	196
<i>Deleting a Meal Pattern</i> .....	197
Data Sources & Versions.....	198
<i>Upgrading a Data Source</i> .....	199

---

<b>Appendix A: Getting Started .....</b>	<b>201</b>
Open PrimeroEdge.....	202
Log In To PrimeroEdge.....	202
Tour the PrimeroEdge Dashboard .....	203
Navigate to Menu Planning.....	204
Log Out of PrimeroEdge.....	205
How to Use This Manual.....	206
<i>Menu and Page Conventions.....</i>	<i>207</i>
<i>Icon Conventions.....</i>	<i>208</i>
Working with Column Data .....	209
Working with List Display Controls.....	210
Working with Tags .....	211
<i>Managing Tags for an Ingredient.....</i>	<i>212</i>
<b>Appendix B: Terms.....</b>	<b>213</b>
<i>Terms Used with Ingredients.....</i>	<i>214</i>
<i>Terms Used with Recipes.....</i>	<i>216</i>
<b>Index .....</b>	<b>219</b>

◀ *End of Contents* ▶



# 1

# Quick View of Menu Planning

This section provides:

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

## Configuration

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

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

---

### A Set Up Data Sources and Meal Patterns

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

#### Data Sources & Versions

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

**Custom** Data Sources are added with help from PrimeroEdge Support. See page 198 for information on Data Sources and Versions.

#### Meal Pattern

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

Custom Meal Patterns are added with help from PrimeroEdge Support. Refer to page 193 for details on Meal Patterns.

## B Set Up Supporting Menu Details

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

### HACCP Configuration

Three (s) **Hazard Analysis** processes and seven (7) **Critical Control Points** are automatically provided by PrimeroEdge [Menu Planning]. Custom processes can be set up, if needed. HACCP processes are selected when creating a Recipe. Refer to page 182 for details on HACCP processes.

### Holiday Schedule

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

The Holiday Schedule must be set up before assigning Menus to a Menu Calendar so that the menu planner can indicate if / when Menus are to be assigned to scheduled holidays. See page 189 for the steps to add holidays to the Holiday Schedule.

### Menu Item Categories

**Menu Item Categories** help to organize Menu Items. Menu Item Categories are selected when building Menus along with the number of choices allowed from each category. See page 153 for information on Menu Item Categories.

### Site Groups

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

Site Groups are used to create a Menu or Menu Cycle, to assign Menus to a Menu Calendar, and to generate reports for groups of sites. See page 169 for site group creation details.

### Menu Lines

**Menu Lines** support offering separate food “themes”, such as Sandwiches, Pizza, Salads, etc., where Menus are built around a particular theme. Menu Lines are used to narrow menu choices when assigning menus. Menu Lines are also specified when configuring a site. See page 166 for details on Menu Lines.

## C Configure Sites

Configuring sites is completed after Meal Types (Meal Patterns), Site Groups, and Menu Lines are set up. See page 178 for details on configuring sites.

### Site Configuration

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

---

## D Select Standard Menu Items

Standard Menu Items are selected from available Menu Items. Menu Items are created from Recipes. Therefore setting up Standard Menu Items is completed after Recipes and then Menu Items have been created. Refer to page 40 for the steps to create a Menu Item from a Recipe.

### Standard Menu Items

**Standard Menu Items** is a set of Menu Items that are included on all or most Menus. Standard Menu Items are added to a Menu by either a) clicking the **Standard Menu Items** button on the **Menu Info** page or b) automatically by enabling the [Menus – Include Standard Menu Items by Default](#) system setting. See page 163 for details on creating Standard Menu Items.

---

## E Create Menu Templates

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

### Menu Templates

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

Before this configuration task can be completed, Meal Pattern(s) (which define Meal Types and Serving Groups) , Menu Items, Menu Item Categories, Standard Menu Items, and Site Groups must be set up. See page 156 for the steps to create Menu Templates.

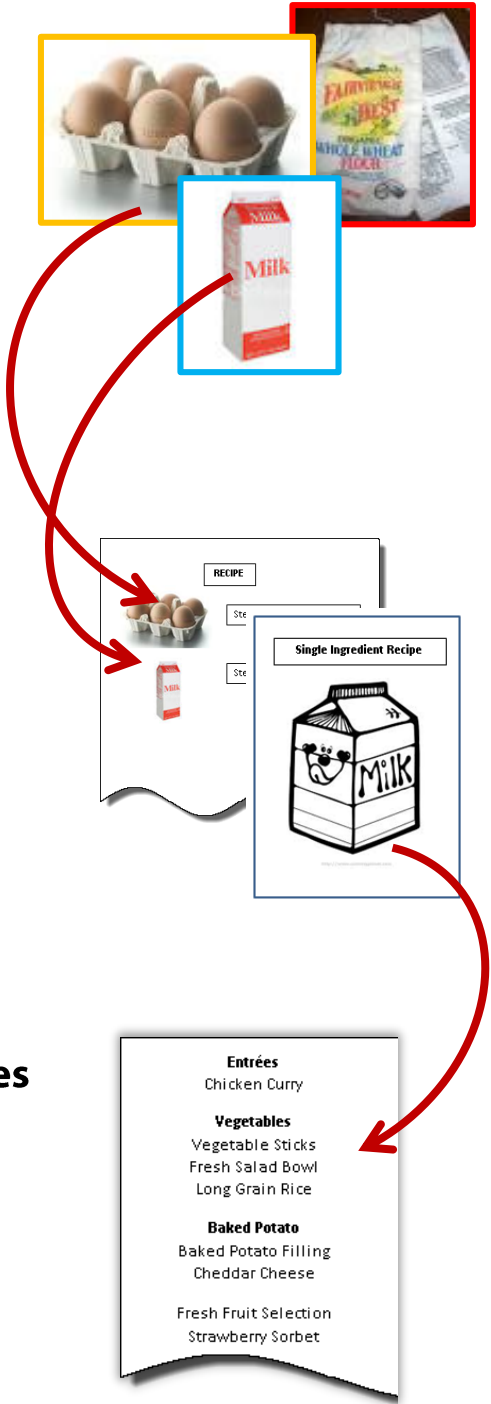
# Ingredients, Recipes & Menu Items

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

## A Add Ingredients

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

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



## B Build Recipes with Ingredients

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

## C Create Menu Items from Recipes

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

# Menus & Menu Cycles

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

## A Add Menus

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

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



## B Add Menu Cycles

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



## C Assign Menu Cycles

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

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

# Reports

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

## **Food Components**

Standard Nutrients footer

Serving Group tab (expanded view) – [Menu](#) / [Menu Cycle](#) / [Multi-Line Analysis](#)

Nutrition Report – [Menu](#) / [Menu Cycle](#) / [Multi-Line Analysis](#)

Food Component Report – [Menu Cycle](#) / [Multi-Line Analysis](#)

Nutrition Summary Report – [Menu Cycle](#)

Reports menu

Weekly Nutrient Analysis

## **Nutrients**

Standard Nutrients footer

Serving Group tab (expanded view) – [Menu](#) / [Menu Cycle](#) / [Multi-Line Analysis](#)

Nutrition Report – [Menu](#) / [Menu Cycle](#) / [Multi-Line Analysis](#)

Nutrition Summary Report – [Menu Cycle](#) / [Multi-Line Analysis](#)

Recipes > Quick Recipe page > Generate Report

Reports menu

Ingredient List

Menu Calendar

Menu Item Nutrients

Nutrient Standards

Recipe Nutrition

Recipe Book

Weekly Nutrient Analysis

## **Ingredients**

Recipes > Quick Recipe page > Generate Report

Reports menu

Ingredient List

Recipe Book

## **Menu Items**

Reports menu

Acceptability Factor

Allergen Chart

Menu Calendar

Menu Item Nutrients

## **Recipes**

Recipes > Scale tab

Custom Scale Recipe

Scale Recipe by Batch

Reports menu

Recipe Book

Recipe Costing

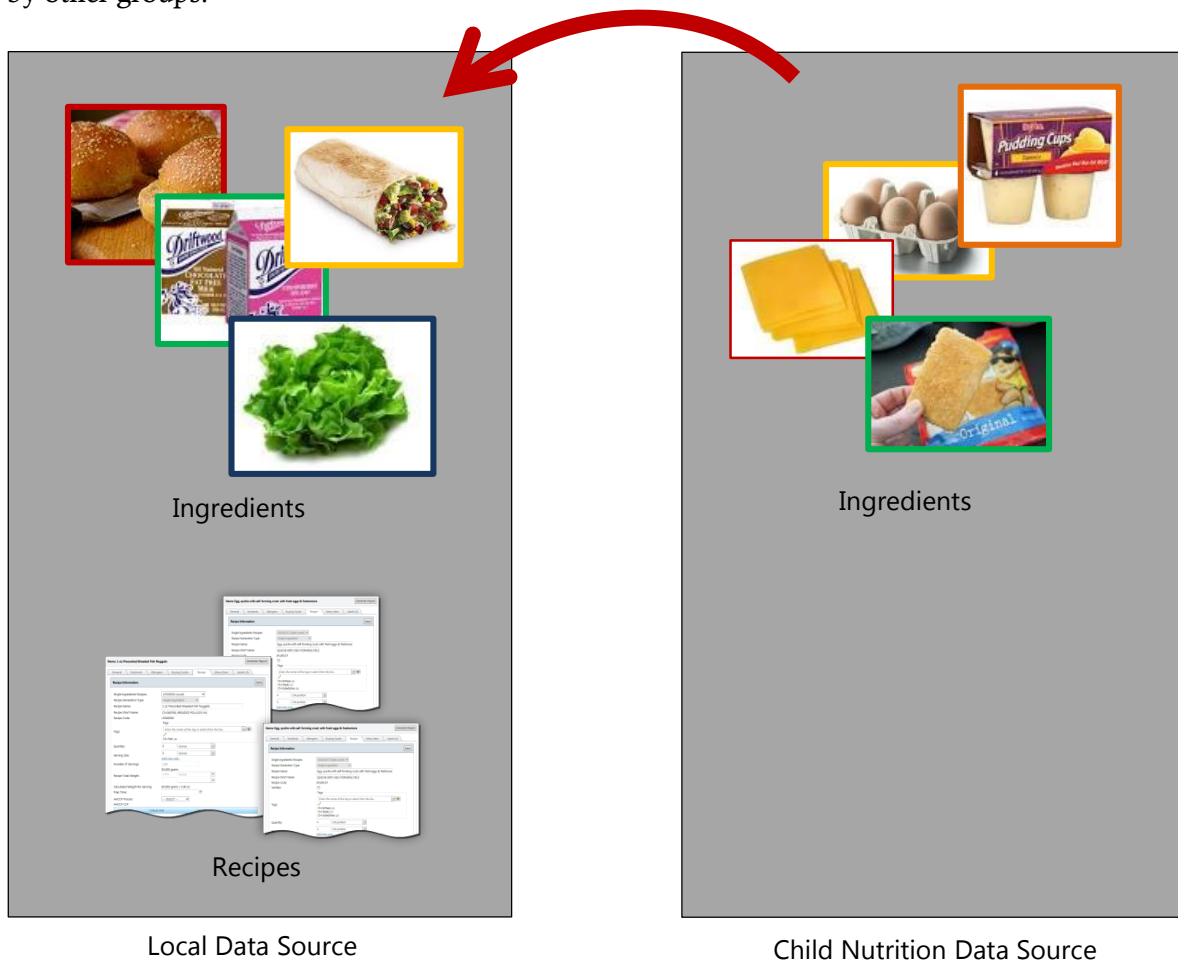
Recipe Nutrition

## Data Sources

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

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

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



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

< End of Section >




# 2 Ingredients

This section reviews:

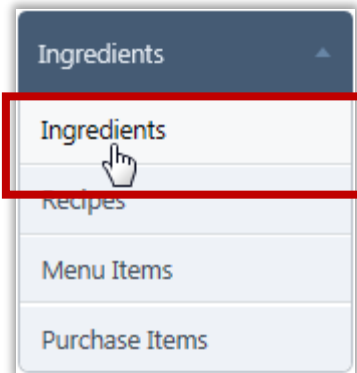
- ✓ Adding a new Ingredient or Recipe.
- ✓ Creating a Single Ingredient Recipe.
- ✓ Adding nutrient, allergen and buying guide information for an Ingredient.
- ✓ Uploading nutrition labels and other documents for an Ingredient.
- ✓ Copying and printing Ingredients and Recipes.
- ✓ Creating a Menu Item.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

## Ingredients at a Glance

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

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

# Ingredients



**Ingredients** allows you to:

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

## Ingredients Page


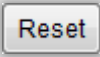
 A screenshot of the 'Ingredients' page. At the top, there is a header 'Ingredients' and a link 'Add New Ingredient'. Below this are several input fields: 'Ingredient Code', 'Ingredient Name', 'Commodity/Recipe Code', 'Manufacturer/Brand', 'Product Code', 'Stock Item#', and 'Data Source' (a dropdown menu set to '-- ALL --'). There is also a 'Tags' section with a dropdown menu and a checkbox for 'Include Discontinued Ingredients'. Under 'Matching Criteria', there are radio buttons for 'Exact Match' and 'Smart Search' (which is selected), along with 'Apply' and 'Reset' buttons. Below the search filters is a table titled 'Ingredients List'.
 

Ingredient Code	Ingredient Name	Ingredient Short Name	Manufacturer	Commodity/Recipe code	Stock Item#	Data Source
<a href="#">9021</a>	Apricots, raw	APRICOTS,RAW				Child Nutrition Database
<a href="#">11697</a>	Arrowroot, raw	ARROWROOT,RAW				Child Nutrition Database
	Artichoke w blue	BRD ARTCK BLUE	SYSCO			Child Nutrition Database

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

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

**Page Functions**

Button/Link	Description
<a href="#">Add Ingredient</a>	Click to display the <b>Quick Ingredients</b> page to enter a name for a new Ingredient.
	Click to display a list of Ingredients that match the selected conditions.
	Click to return all settings in the search condition fields to the default values.

**Ingredients List**


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

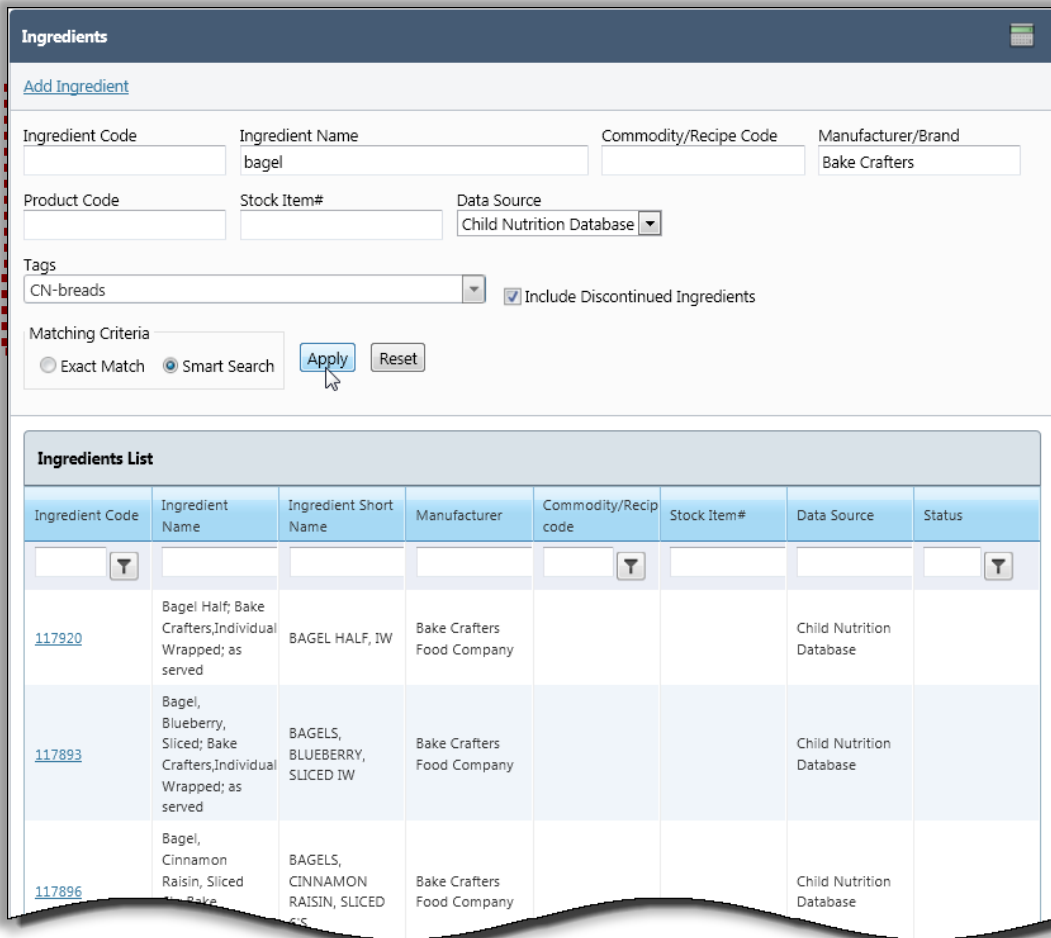
## Searching for an Ingredient

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

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

### To search for an Ingredient

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




The screenshot shows the 'Ingredients' search interface. It includes a search form with the following fields:

- Ingredient Code:** (empty)
- Ingredient Name:** bagel
- Commodity/Recipe Code:** (empty)
- Manufacturer/Brand:** Bake Crafters
- Product Code:** (empty)
- Stock Item#:** (empty)
- Data Source:** Child Nutrition Database
- Tags:** CN-breads
- Include Discontinued Ingredients:**
- Matching Criteria:**
  - Exact Match
  - Smart Search
- Buttons:** Apply, Reset


Below the search form is the 'Ingredients List' table:

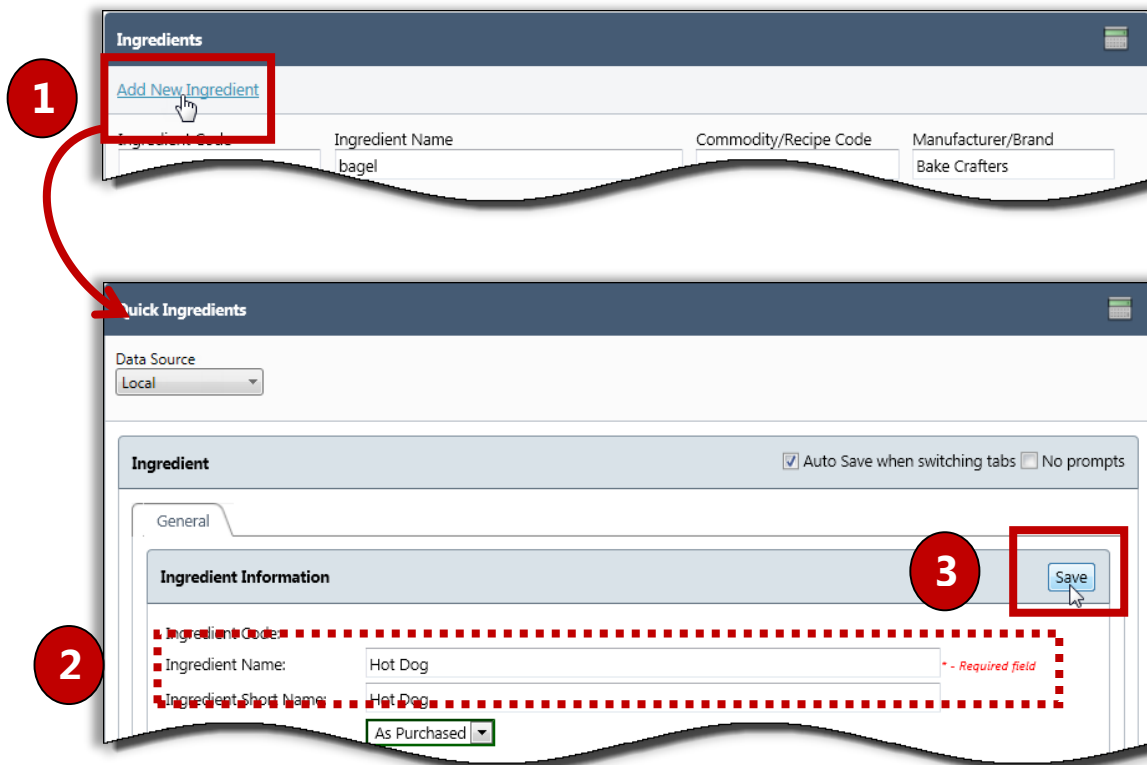
Ingredient Code	Ingredient Name	Ingredient Short Name	Manufacturer	Commodity/Recipe code	Stock Item#	Data Source	Status
<a href="#">117920</a>	Bagel Half; Bake Crafters, Individual Wrapped; as served	BAGEL HALF, IW	Bake Crafters Food Company			Child Nutrition Database	
<a href="#">117893</a>	Bagel, Blueberry, Sliced; Bake Crafters, Individual Wrapped; as served	BAGELS, BLUEBERRY, SLICED IW	Bake Crafters Food Company			Child Nutrition Database	
<a href="#">117896</a>	Bagel, Cinnamon Raisin, Sliced; Bake Crafters, Individual Wrapped; as served	BAGELS, CINNAMON RAISIN, SLICED IW	Bake Crafters Food Company			Child Nutrition Database	

## Adding a New Ingredient

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

### To add a new ingredient


1. Click the [Add New Ingredient](#) link.
2. Enter the Ingredient name and short name.
3. Click  .

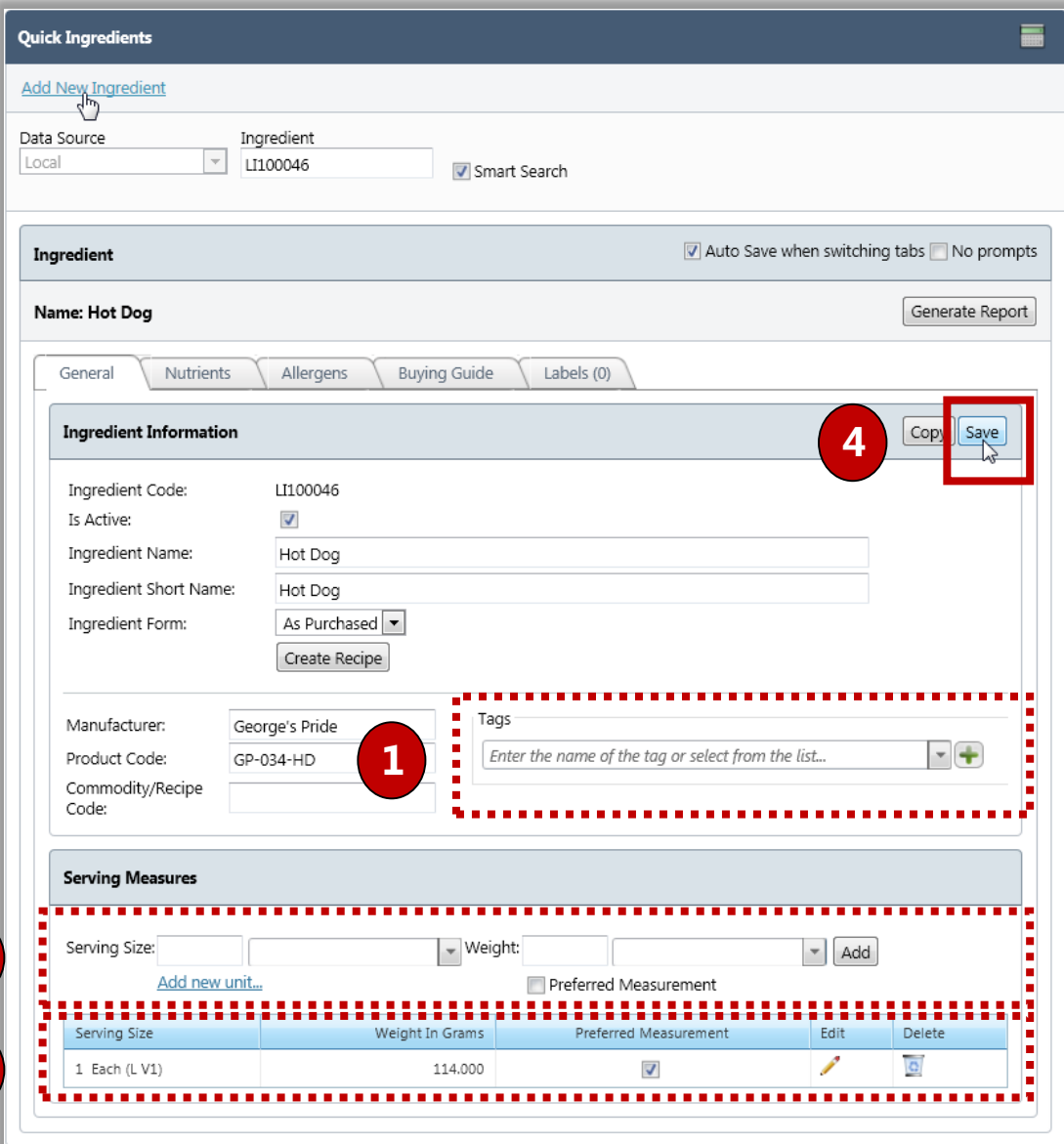


## Tab 1: General

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

### To complete the General tab:

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



**Quick Ingredients**

[Add New Ingredient](#)

Data Source: Local Ingredient: LI100046  Smart Search

**Ingredient**  Auto Save when switching tabs  No prompts

Name: Hot Dog

General | Nutrients | Allergens | Buying Guide | Labels (0)

**Ingredient Information**

Ingredient Code: LI100046  
 Is Active:   
 Ingredient Name: Hot Dog  
 Ingredient Short Name: Hot Dog  
 Ingredient Form: As Purchased

Manufacturer: George's Pride **1**  
 Product Code: GP-034-HD  
 Commodity/Recipe Code:

Tags

**Serving Measures**

Serving Size:    Weight:     
[Add new unit...](#)  Preferred Measurement


Serving Size	Weight In Grams	Preferred Measurement	Edit	Delete
1 Each (L V1)	114.000	<input checked="" type="checkbox"/>	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>

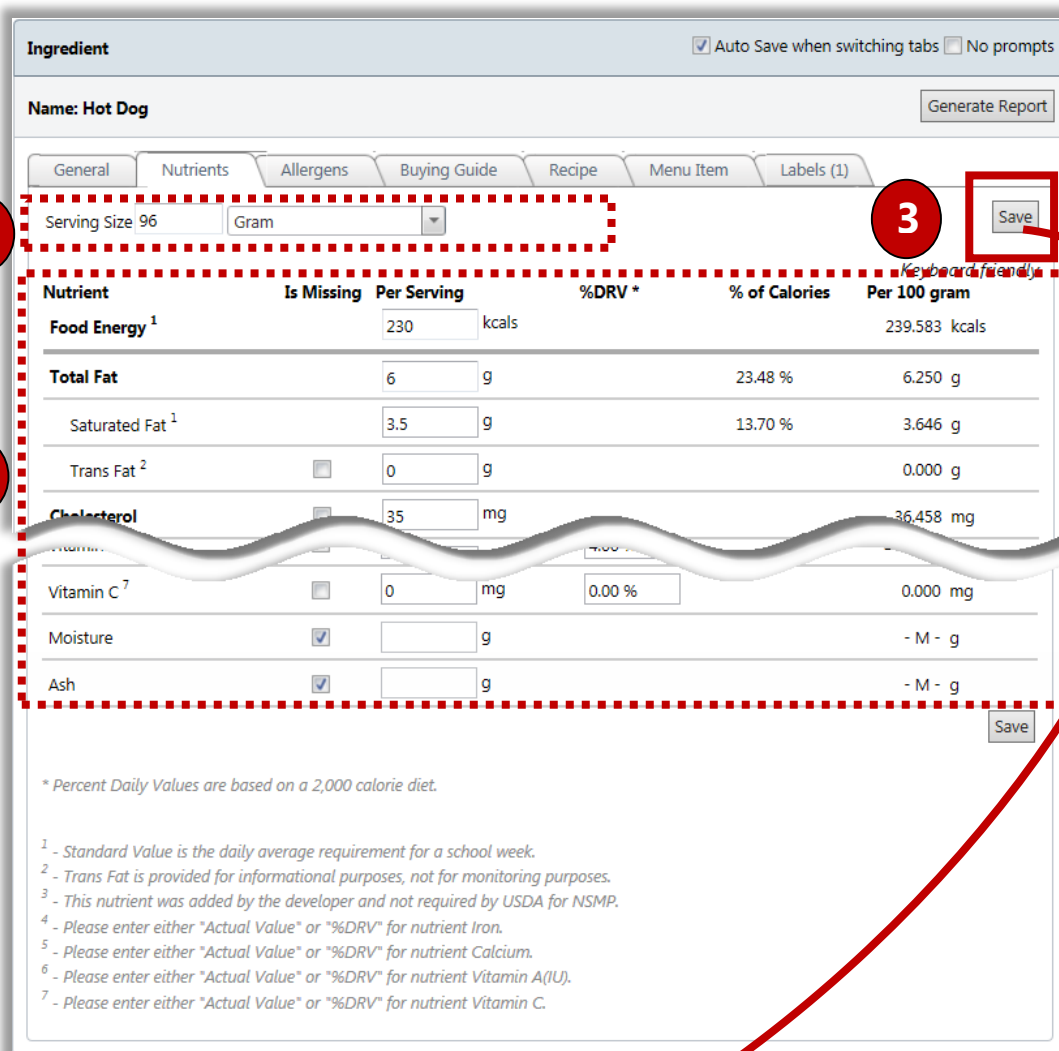
**2** **3** **4**

## Tab 2: Nutrients

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

### To complete the Nutrients tab:

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



**Ingredient**  Auto Save when switching tabs  No prompts

Name: Hot Dog Generate Report

General Nutrients Allergens Buying Guide Recipe Menu Item Labels (1)

Serving Size 96 Gram Save

Nutrient	Is Missing	Per Serving	%DRV *	% of Calories	Per 100 gram
Food Energy <sup>1</sup>		230 kcals			239.583 kcals
Total Fat		6 g		23.48 %	6.250 g
Saturated Fat <sup>1</sup>		3.5 g		13.70 %	3.646 g
Trans Fat <sup>2</sup>	<input type="checkbox"/>	0 g			0.000 g
Cholesterol	<input type="checkbox"/>	35 mg			36.458 mg
Vitamin C <sup>7</sup>	<input type="checkbox"/>	0 mg	0.00 %		0.000 mg
Moisture	<input checked="" type="checkbox"/>	g			- M - g
Ash	<input checked="" type="checkbox"/>	g			- M - g

Save

\* Percent Daily Values are based on a 2,000 calorie diet.

<sup>1</sup> - Standard Value is the daily average requirement for a school week.  
<sup>2</sup> - Trans Fat is provided for informational purposes, not for monitoring purposes.  
<sup>3</sup> - This nutrient was added by the developer and not required by USDA for NSMP.  
<sup>4</sup> - Please enter either "Actual Value" or "%DRV" for nutrient Iron.  
<sup>5</sup> - Please enter either "Actual Value" or "%DRV" for nutrient Calcium.  
<sup>6</sup> - Please enter either "Actual Value" or "%DRV" for nutrient Vitamin A(IU).  
<sup>7</sup> - Please enter either "Actual Value" or "%DRV" for nutrient Vitamin C.

Nutrients saved successfully.

A save success message appears after clicking  .

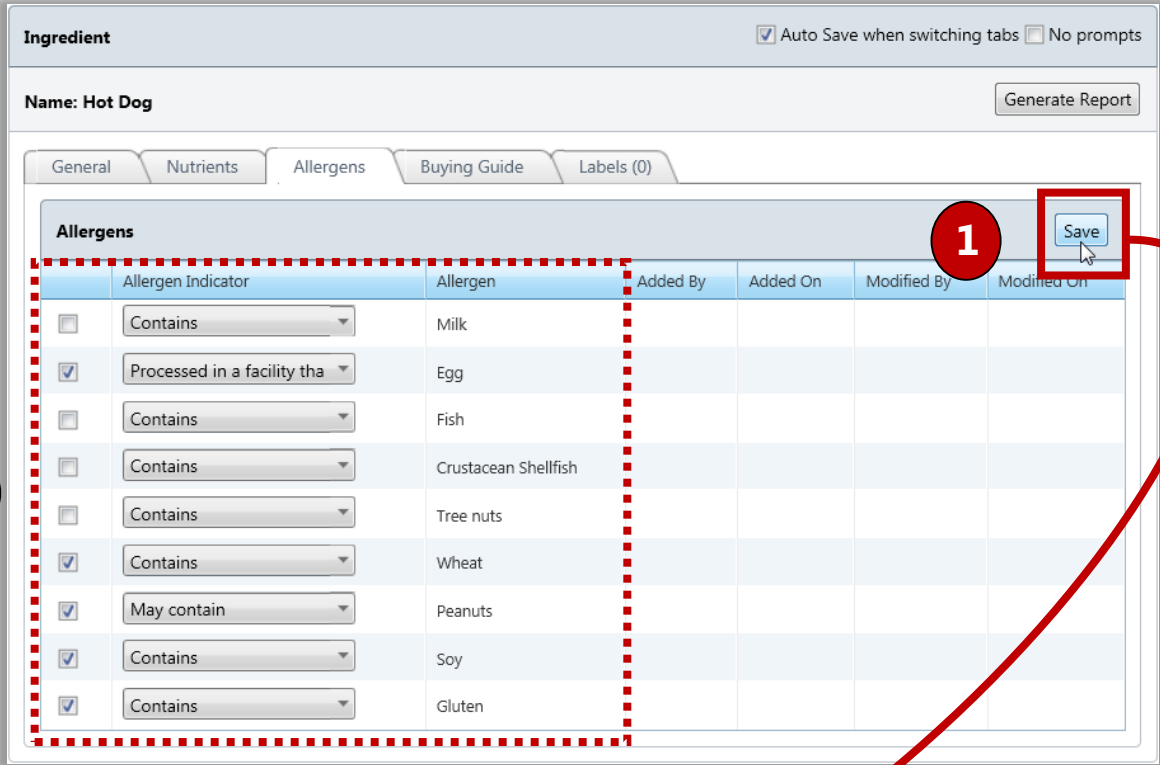


### Tab 3: Allergens

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

**To complete the Allergens tab:**

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



**Ingredient**  Auto Save when switching tabs  No prompts

**Name: Hot Dog**

General Nutrients **Allergens** Buying Guide Labels (0)

**Allergens**

	Allergen Indicator	Allergen	Added By	Added On	Modified By	Modified On
<input type="checkbox"/>	Contains	Milk				
<input checked="" type="checkbox"/>	Processed in a facility tha	Egg				
<input type="checkbox"/>	Contains	Fish				
<input type="checkbox"/>	Contains	Crustacean Shellfish				
<input type="checkbox"/>	Contains	Tree nuts				
<input checked="" type="checkbox"/>	Contains	Wheat				
<input checked="" type="checkbox"/>	May contain	Peanuts				
<input checked="" type="checkbox"/>	Contains	Soy				
<input checked="" type="checkbox"/>	Contains	Gluten				

Allergens saved successfully.


## Tab 4: Buying Guide

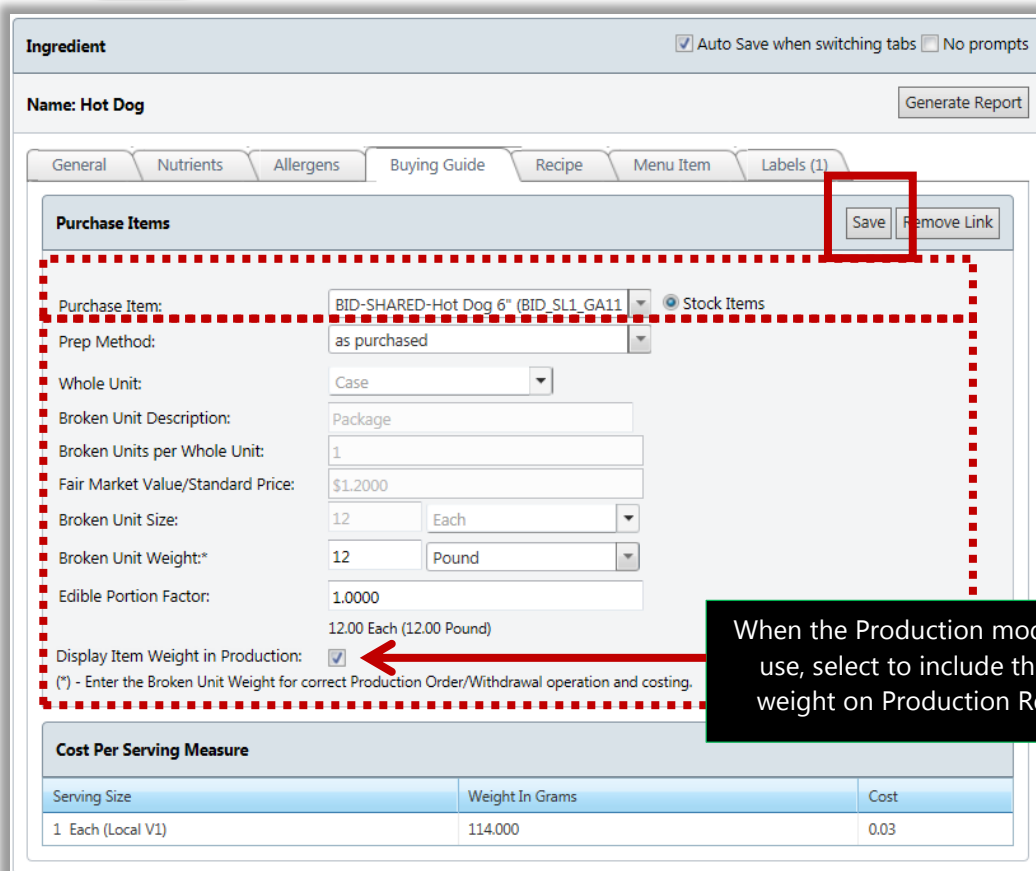
The **Buying Guide** tab provides information on how the ingredient is obtained.

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

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

### To complete the Buying Guide tab:

1. Enable either **Purchase Items** or **Stock Items**, and select an item.
2. For the remaining fields:
  - For **Stock Items**, several fields are completed for you. Select a **Prep Method** and **Broken Unit Weight**, and enter the **Edible Portion Factor**; select **Display Item Weight in Production** if the **Production** module is in use and the item weight should be shown on the Production Record.
  - For **Purchase Items**, select or enter data for each field.
3. Click .



**Ingredient**  Auto Save when switching tabs  No prompts

Name: Hot Dog Generate Report

General Nutrients Allergens **Buying Guide** Recipe Menu Item Labels (1)

**Purchase Items** Save Remove Link

Purchase Item: BID-SHARED-Hot Dog 6" (BID\_SL1\_GA11)  Stock Items

Prep Method: as purchased

Whole Unit: Case

Broken Unit Description: Package

Broken Units per Whole Unit: 1

Fair Market Value/Standard Price: \$1.2000

Broken Unit Size: 12 Each

Broken Unit Weight:\* 12 Pound

Edible Portion Factor: 1.0000  
12.00 Each (12.00 Pound)

Display Item Weight in Production:  ←

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

**Cost Per Serving Measure**

Serving Size	Weight In Grams	Cost
1 Each (Local V1)	114.000	0.03

When the Production module is in use, select to include the item weight on Production Records

## Tab 5: Labels

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

### To add a label

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


The diagram illustrates the process of adding a nutrition label to an ingredient's profile. It shows three sequential steps:

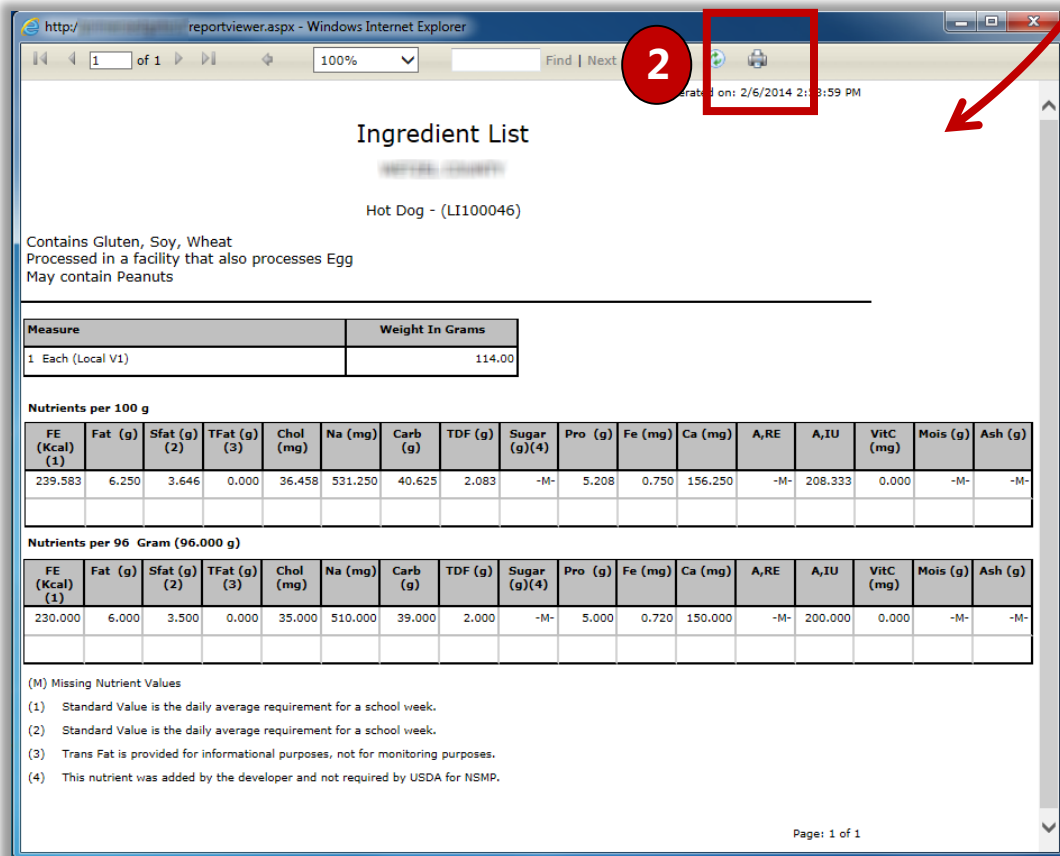
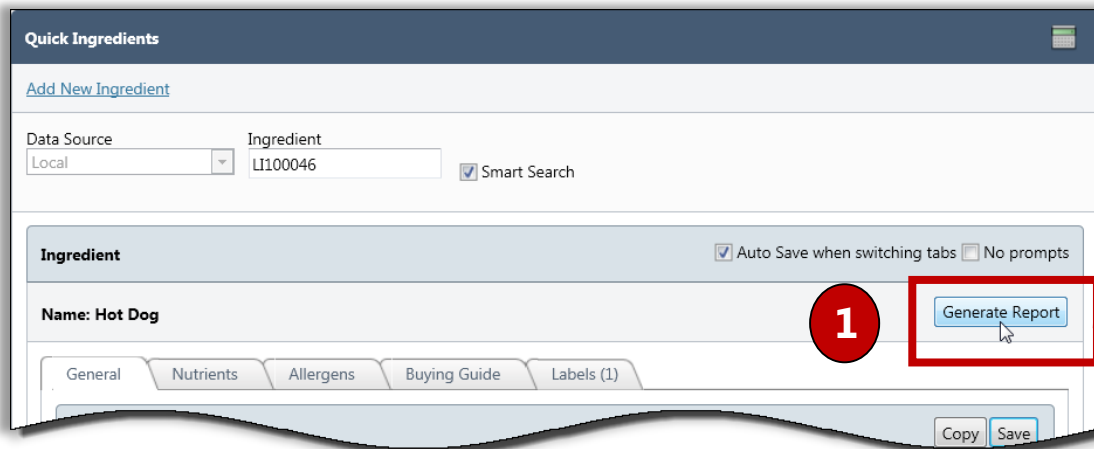
- Step 1:** The user is in the 'Labels (0)' tab of the 'Hot Dog' ingredient profile. The 'Upload File' button in the 'Add Document' section is highlighted with a red box and a '1' in a red circle.
- Step 2:** An 'Upload File' dialog box is open, showing the file 'image\_label\_hotdog\_GeorgesP' selected. The 'Upload' button is highlighted with a red box and a '2' in a red circle.
- Step 3:** The 'Add Document' dialog box is open, showing the file name 'image\_label\_hotdog\_GeorgesPride;' and the description 'Nutrition Label - George's Pr'. The 'OK' button is highlighted with a red box and a '3' in a red circle.

## Generating an Ingredient List Report

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

### To generate an Ingredient List report:

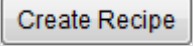

1. Click **Generate Report** .
2. Click **Print** (  ) on the report viewer toolbar.

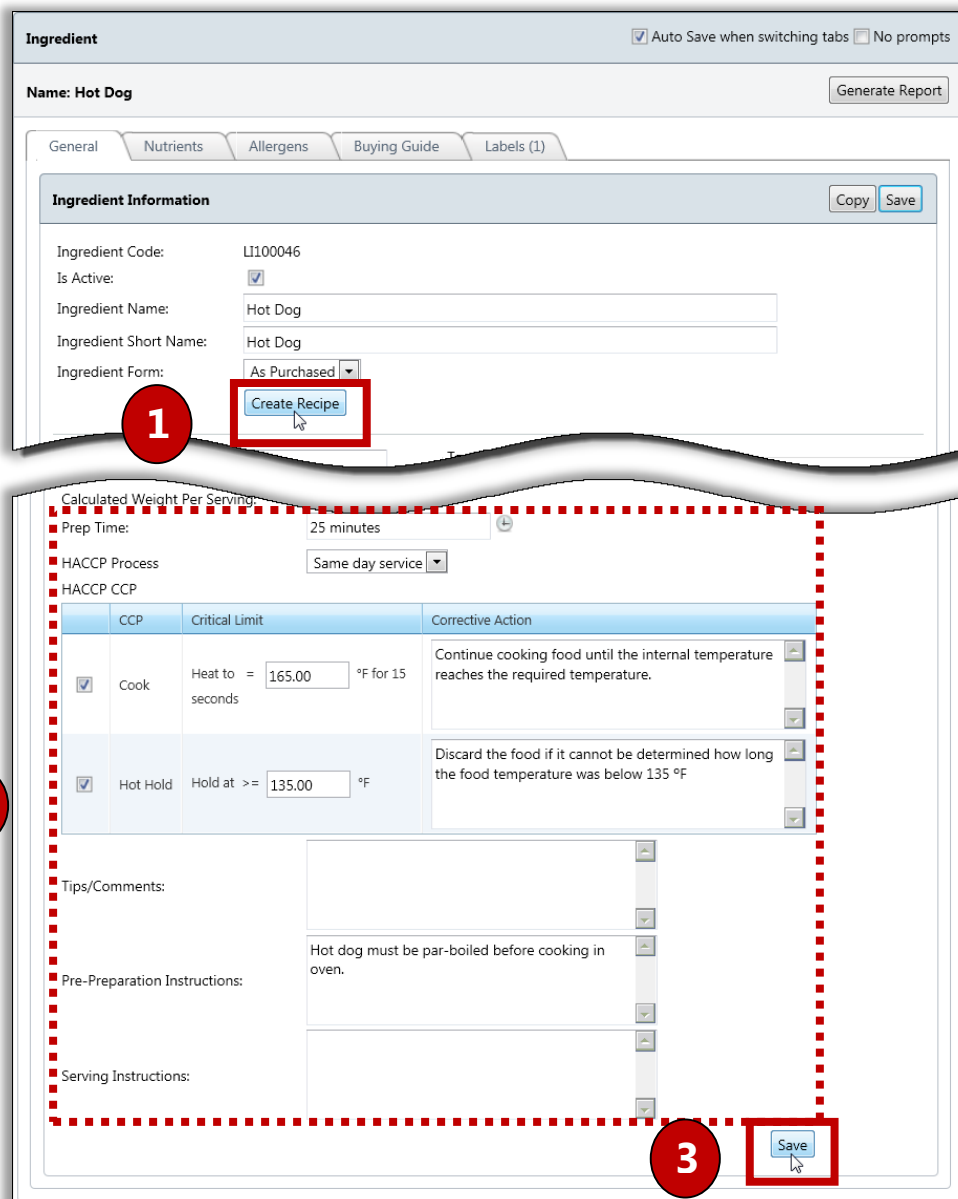


## Creating a Recipe from a Single Ingredient

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

### To create a Single Ingredient recipe:

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



**Ingredient**  Auto Save when switching tabs  No prompts

Name: Hot Dog Generate Report

General **Nutrients** Allergens Buying Guide Labels (1)

**Ingredient Information** Copy Save

Ingredient Code: LI100046  
 Is Active:   
 Ingredient Name: Hot Dog  
 Ingredient Short Name: Hot Dog  
 Ingredient Form: As Purchased ▼  
1 Create Recipe

---

Calculated Weight Per Serving:

Prep Time: 25 minutes ⌵

HACCP Process: Same day service ▼

HACCP CCP

CCP	Critical Limit	Corrective Action
<input checked="" type="checkbox"/>	Cook Heat to = 165.00 °F for 15 seconds	Continue cooking food until the internal temperature reaches the required temperature.
<input checked="" type="checkbox"/>	Hot Hold Hold at >= 135.00 °F	Discard the food if it cannot be determined how long the food temperature was below 135 °F

Tips/Comments:

Pre-Preparation Instructions: Hot dog must be par-boiled before cooking in oven.



Serving Instructions:

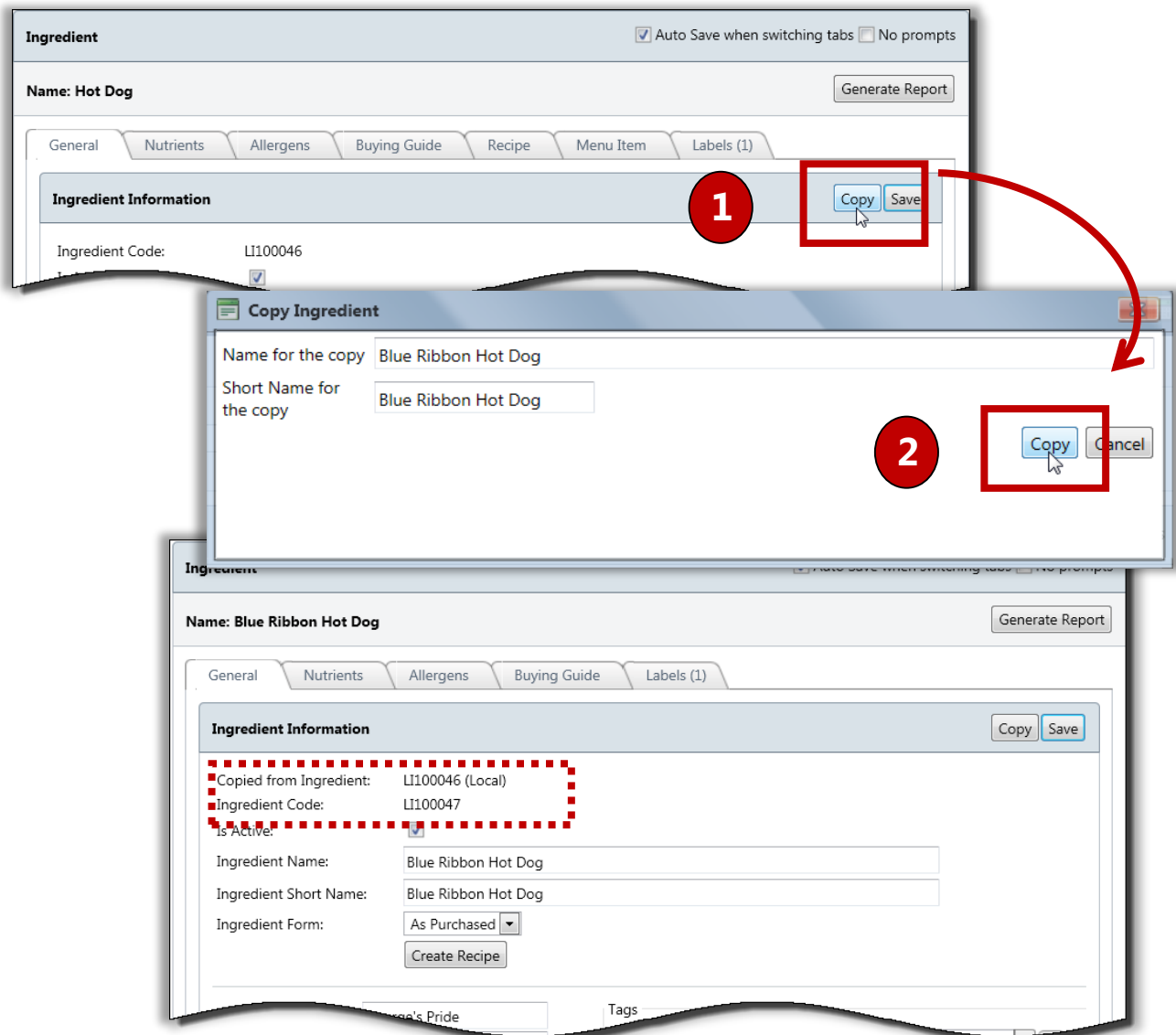
2 3 Save

## Copying an Ingredient

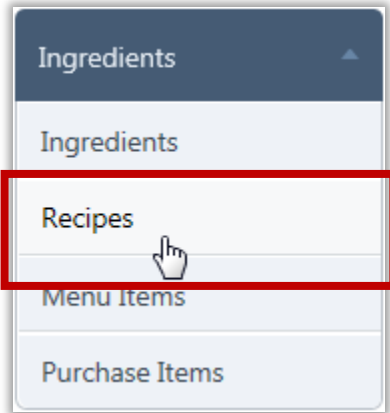
When copying any Ingredient, you will enter a name and a short name for the copied Ingredient. PrimeroEdge automatically creates the Ingredient Code (based on **Recipes – Auto Generate Recipe Codes** system setting). The original Ingredient is listed on the **General** tab above the copied Ingredient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

### To copy an Ingredient:

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



## Recipes



**Recipes** allows you to:

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

### Recipes Page

 The screenshot shows the 'Recipes' page interface. At the top, there is a header with the title 'Recipes' and a small icon. Below the header is a link 'Add New Recipe'. The main section is titled 'Recipe Search Criteria' and contains several input fields and controls:
 

- 'Recipe Code' and 'Recipe Name' text input fields.
- An 'Include Discontinued Recipes' checkbox.
- 'Tags' and 'Data Source' dropdown menus.
- An 'Ingredient' text input field and a checked 'Smart Search' checkbox.
- 'Matching Criteria' section with radio buttons for 'Exact Match' and 'Smart Search', and 'Apply' and 'Reset' buttons.

 Below the search criteria is a 'Recipe List' section containing a table with the following data:
 

Recipe Code	Name	Serving Size	Type	Number of Servings	Source
<a href="#">LR300008</a>	Apples, dried, sulfured, uncooked	1 CN-Ring	Single Ingredient	1	Cybersoft
	Applesauce Cake C-03	1 CN-		50	Cybersoft

By default on the **Recipes** page:

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

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

**Page Functions**

Button/Link	Description
<a href="#">Add Recipe</a>	Click to display the <b>Quick Recipes</b> page to enter a name for a new Recipe.
<input type="button" value="Apply"/>	Click to display all Recipe records in the <b>Recipe List</b> that match the set search conditions.
<input type="button" value="Reset"/>	Click to return all search criteria fields to the default settings.

**Recipe List Listings**

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

Column Header	Description
Recipe Code	Code assigned when the Recipe is created
Name	Recipe Name
Serving Size	Preferred serving measurement
Type	Recipe type can be one of the following: <ul style="list-style-type: none"> <li>• Nutrition Analysis – uses Ingredients set up in <b>Menu Planning</b></li> <li>• Production – uses Purchase Items which are Ingredients linked to Inventory items in the <b>Inventory</b> module</li> <li>• Dual Entry – uses Ingredients and/or Purchase Items</li> <li>• Single Ingredient – includes only one ingredient; this type of recipe is usually created from purchased items that are served as is, such as a “bagel”</li> </ul>
Number of Servings	Number of servings made with one iteration of the recipe
Source	Database (Data Source) in which the Recipe is stored




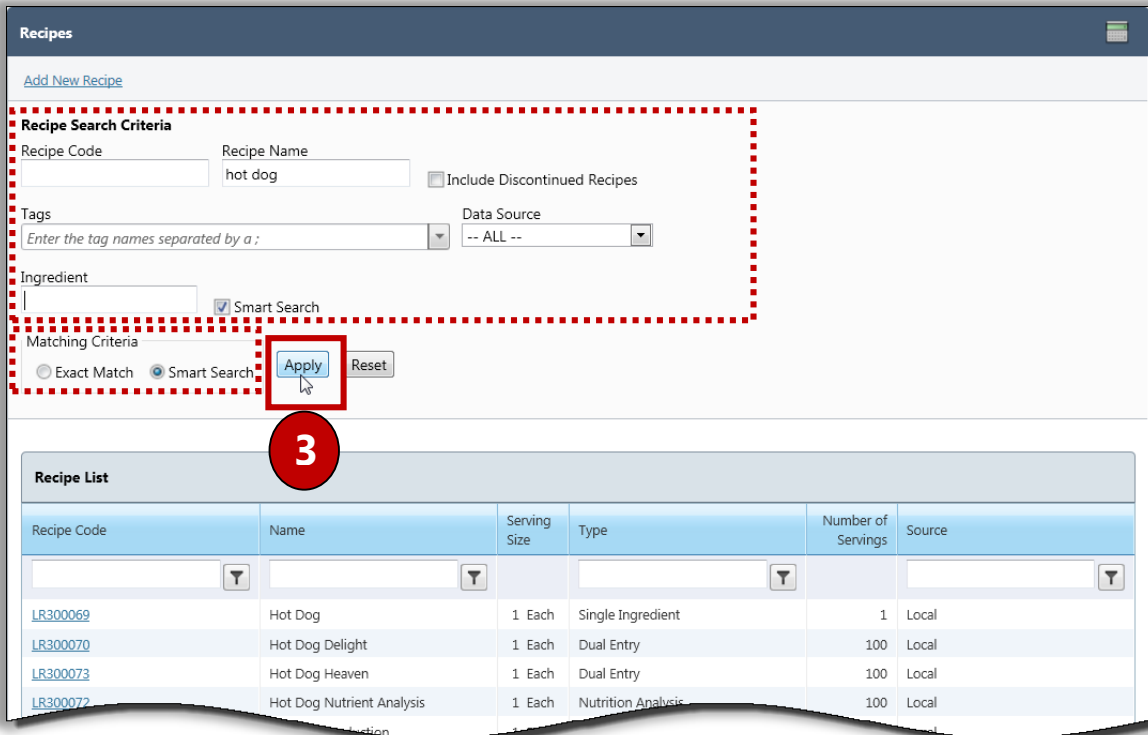
## Searching for a Recipe

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

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

### To search for a Recipe

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



The screenshot shows the 'Recipes' search interface. The 'Recipe Search Criteria' section is highlighted with a red dashed box (1). It includes fields for 'Recipe Code', 'Recipe Name' (containing 'hot dog'), 'Tags', 'Ingredient', and 'Data Source'. The 'Matching Criteria' section (2) has radio buttons for 'Exact Match' and 'Smart Search' (selected), and an 'Apply' button (3) and a 'Reset' button. Below the search criteria is a 'Recipe List' table.

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

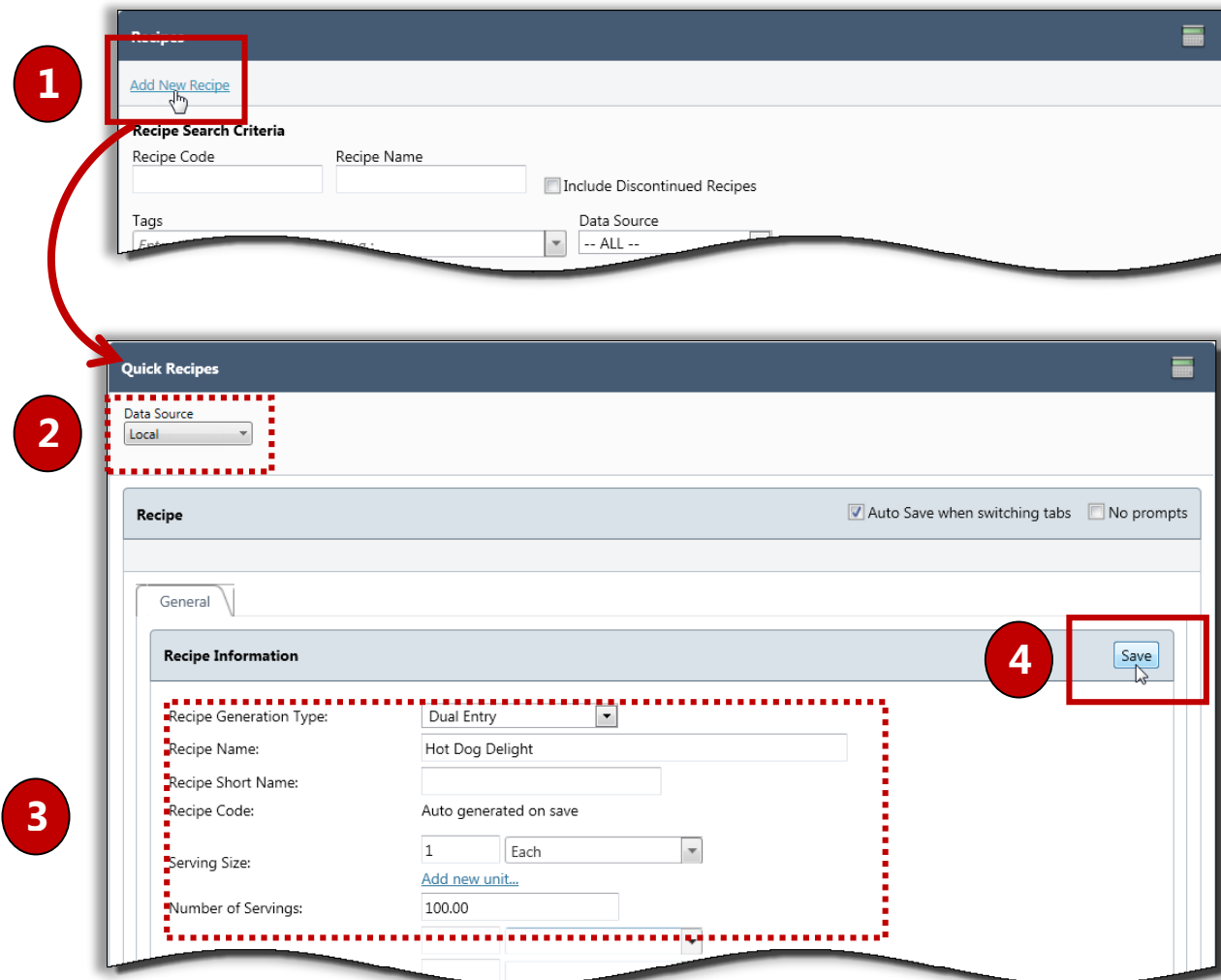
## Adding a New Recipe

Three types of recipes can be added:

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

### To add a new Recipe


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

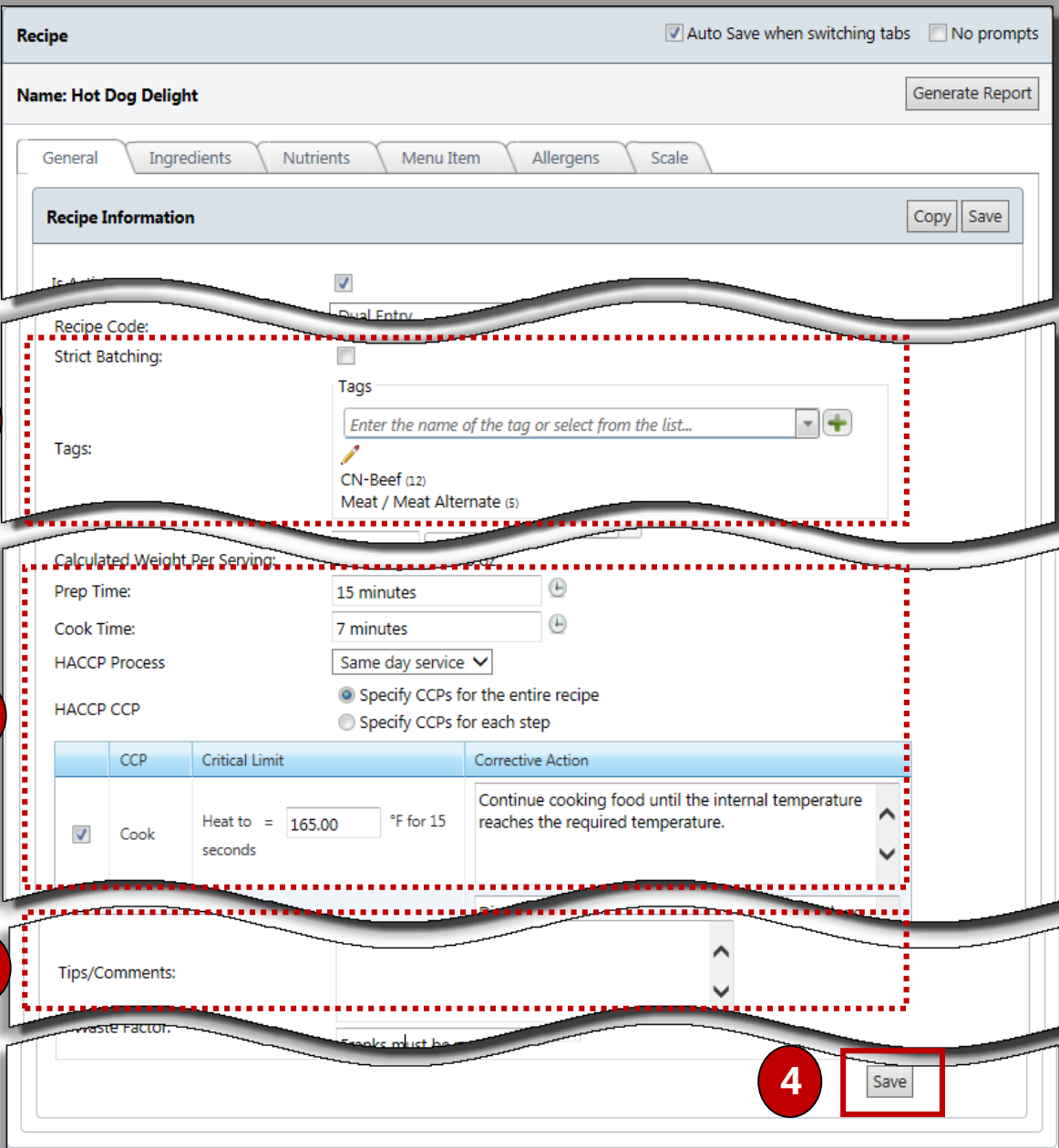


## Tab 1: General

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

### To complete the General tab

1. Select **Strict Batching** to require scaling of number of servings by whole batch only; set up **Tags**, if needed.
2. Enter **Prep Time** and **Cook Time**, and select a **HACCP Process** and select CCPs.
3. Enter **Tips**, **Comments** or **Special Instructions**, as needed.
4. Click  .



**Recipe**  Auto Save when switching tabs  No prompts

**Name: Hot Dog Delight** Generate Report

General Ingredients Nutrients Menu Item Allergens Scale

**Recipe Information** Copy Save

Is Active:  Equal Entry

Recipe Code:

Strict Batching:

Tags:  +

CN-Beef (12)  
Meat / Meat Alternate (5)

Calculated Weight Per Serving:  g

Prep Time:  minutes

Cook Time:  minutes

HACCP Process:

HACCP CCP:  Specify CCPs for the entire recipe  Specify CCPs for each step

	CCP	Critical Limit	Corrective Action
<input checked="" type="checkbox"/>	Cook	Heat to = <input type="text" value="165.00"/> °F for 15 seconds	Continue cooking food until the internal temperature reaches the required temperature.

Tips/Comments:

WASTE FACTOR:

4 Save

## Tab 2: Ingredients

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

**To add an ingredient/step:**

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

**Recipe**  Auto Save when switching tabs  No prompts

**Name: Hot Dog Delight** [Generate Report](#)

General Ingredients **Nutrients** Menu Item Allergens Scale

**Steps**

#	Picture	Stock Item#	Purchase Item	Cost	Ingredient	Directions	PI WIG	WIG	DOR	Delete
No records to display.										

[Add Step](#)

Purchase Item Only:

Purchase Item: Home Run Hot Dog Buns

Prep Method: as purchased

Quantity: 100 Roll

Edible Portion Factor: 1


Ingredient Only:

Ingredient: LI100048  Smart Search

Ingredient Name: Hot Dog Buns

100.000 Roll

Image: [Click to enlarge](#)

 **3**

Upload Picture

Uploaded File: image\_hotdogs.png

Directions:

1. Open roll.  
2. Place roll on baking sheet

Display on Record

[Apply](#) [Cancel](#) **4**

Recipe Costing Information

Total Recipe Cost: 0.0000

Number of Servings: 100.000000

Serving Size: 1 Each (L V1)

Cost Per Serving: 0.0000

### Notes on Selecting a Purchase Item or Ingredient.

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

Records to display: 10

[Add Step](#)

Ingredient Only:

Ingredient:  
LI100048    Smart Search

Ingredient Name:  
Hot Dog Buns

100  Roll (L V1)

Image:  [Click to enlarge](#)

Directions:  
1. Open roll.  
2. Place roll on baking sheet.

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

[Add Step](#)

Purchase Item Only:

Purchase Item: Home Run Hot Dog Buns

Prep Method: as purchased

Quantity: 100  Roll

Image:

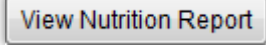

Directions:

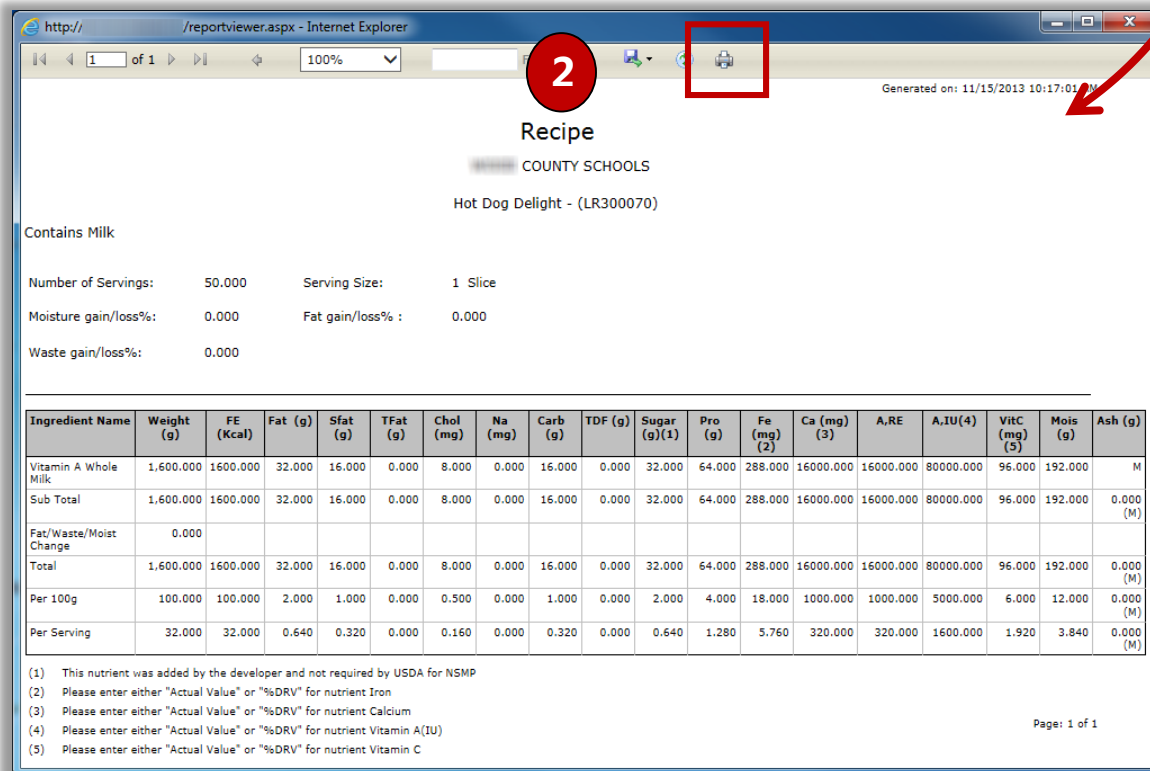
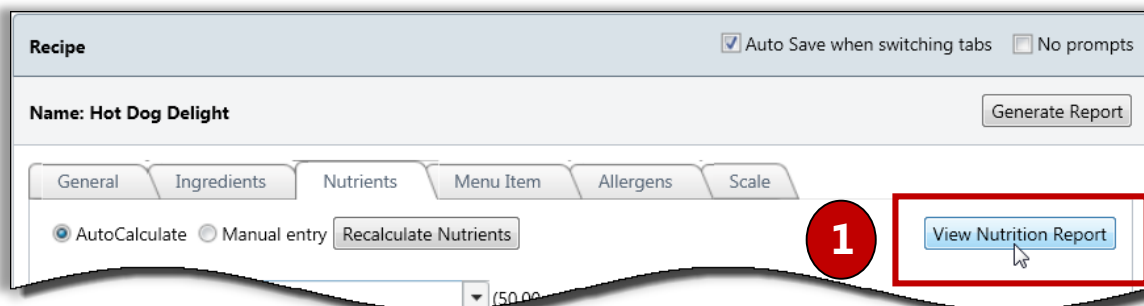
The **Ingredients** tab image shown on the previous page appears when you create a “Dual Entry” recipe type where you can select either a Purchase Item or an Ingredient.

### Tab 3: Nutrients


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

#### To view and print a recipe Nutrition Report

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



### To manually enter nutrient values

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

**Recipe**  Auto Save when switching tabs  No prompts

**Name:** Hot Dog Delight

General Ingredients **Nutrients** Menu Item Allergens Scale

1   Manual entry

Serving Size 1 Each (50.00 gram)

Nutrient	Is Missing	Per Serving	%DRV *	% of Calories	Keyboard friendly Per 100 gram
<b>Food Energy</b>		360 kcals			720.000 kcals
<b>Total Fat</b>		16 g		40.00 %	32.000 g
Saturated Fat		1.5 g		3.75 %	3.000 g
Trans Fat <sup>1</sup>	<input type="checkbox"/>	0 g			0.000 g
<b>Cholesterol</b>	<input type="checkbox"/>	70 mg			140.000 mg
<b>Sodium</b>	<input type="checkbox"/>	480 mg			960.000 mg
<b>Carbohydrate</b>		53 g		58.89 %	106.000 g
Total Dietary Fiber	<input type="checkbox"/> 2	3 g			6.000 g
<b>Protein</b>		6 g		6.67 %	12.000 g
Iron <sup>3</sup>	<input type="checkbox"/>	1.44 mg	8.00 %		2.880 mg
Calcium <sup>3</sup>	<input type="checkbox"/>	0.00 mg	0.00 %		0.000 mg
Vitamin A (RE)	<input checked="" type="checkbox"/>				- M - RE
Vitamin A (IU) <sup>3</sup>	<input type="checkbox"/>	100.00 IU	2.00 %		200.000 IU
Vitamin C <sup>3</sup>	<input type="checkbox"/>	1.2 mg	2.00		2.400 mg
Moisture	<input checked="" type="checkbox"/>				- M - g
Ash	<input checked="" type="checkbox"/>				- M - g


RE -> IU    IU -> RE 3

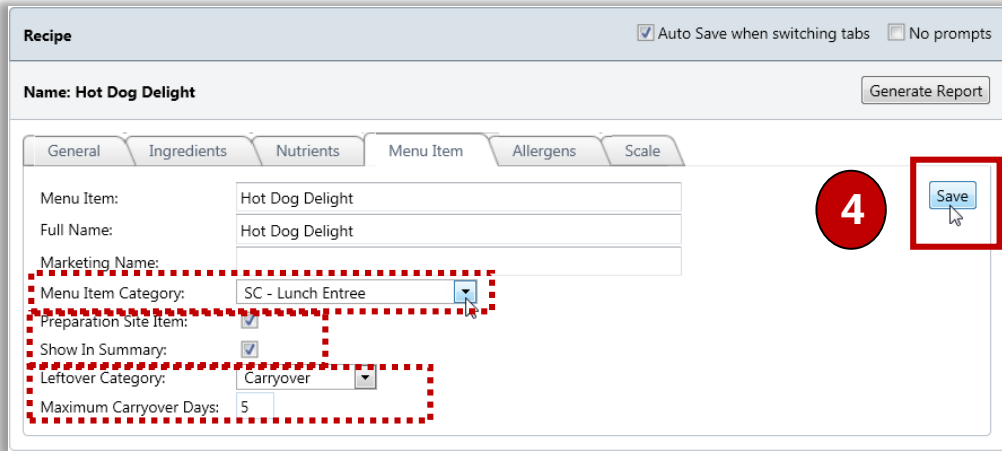
... 2,000 calorie diet.

## Tab 4: Menu Item

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

### To create a Menu Item

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



**Recipe** Auto Save when switching tabs  No prompts

**Name:** Hot Dog Delight Generate Report

General Ingredients Nutrients **Menu Item** Allergens Scale

Menu Item: Hot Dog Delight

Full Name: Hot Dog Delight

Marketing Name:


Menu Item Category: SC - Lunch Entree

Preparation Site Item:


Show In Summary:

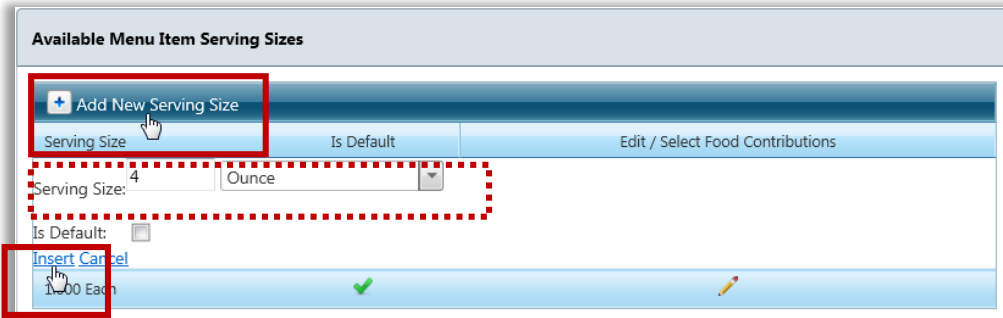
Leftover Category: Carryover

Maximum Carryover Days: 5



**4** 

### To add an available Menu Item serving size:

1. Click  .
2. Enter a **Serving Size** and select a serving measurement.
3. Click the [Insert](#) link.



**Available Menu Item Serving Sizes**

Serving Size	Is Default	Edit / Select Food Contributions
<p><b>1</b> </p> <p><b>2</b> Serving Size: 4 Ounce</p> <p>Is Default: <input type="checkbox"/></p>		
<p><b>3</b> <a href="#">Insert</a></p> <p>1.00 Each</p>	<input checked="" type="checkbox"/>	



**To add food component contributions:**

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

**Contributions - 1.00 Each**

**Meal Pattern** ?

Milk Type: Skim/fat-free, unflavored

Fruit Juice  Vegetable Juice  Grain Based Dessert

Food Component	Contribution
Fruits (cups)	Fruit
Fluid Milk (cups)	MILK-F
Meat/Meat Alternates (oz eq)	2 Meat/MA
Grains (oz eq)	
Whole Grain-Rich	2 WG
Non Whole Grains-Rich	Non-WG
Vegetables (cups)	
Dark Green	Veg-DG
Red/Orange	Veg-RO
Beans/Peas (Legumes)	1/2 Veg-BP
Starchy	Veg-S
Other	Veg-O

**Save**

**To add a serving size exception:**

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

**Default Serving Size Exceptions**

**+ Add New Serving Size Exception For Serving Group**

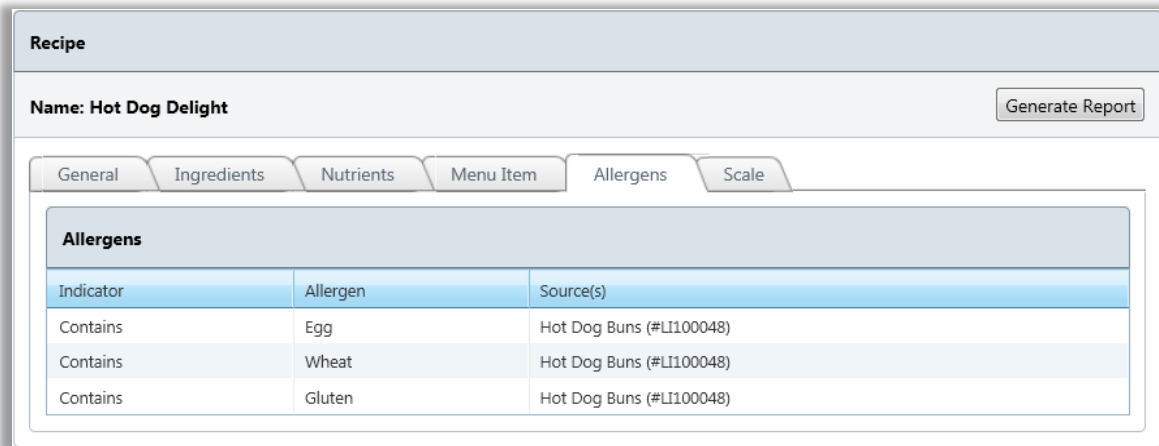
Meal Pattern	Serving Group	Serving Size	Edit	Delete
Meal Pattern SY 2012-2014	9-12	5,00 Ounce		

[Insert](#) [Cancel](#)

No records to display.

## Tab 5: Allergens

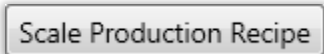
The **Allergens** tab reflects all allergens listed for each ingredient used in the recipe. This information is read-only. To change allergen information, you must update the **Allergens** tab for individual ingredients.

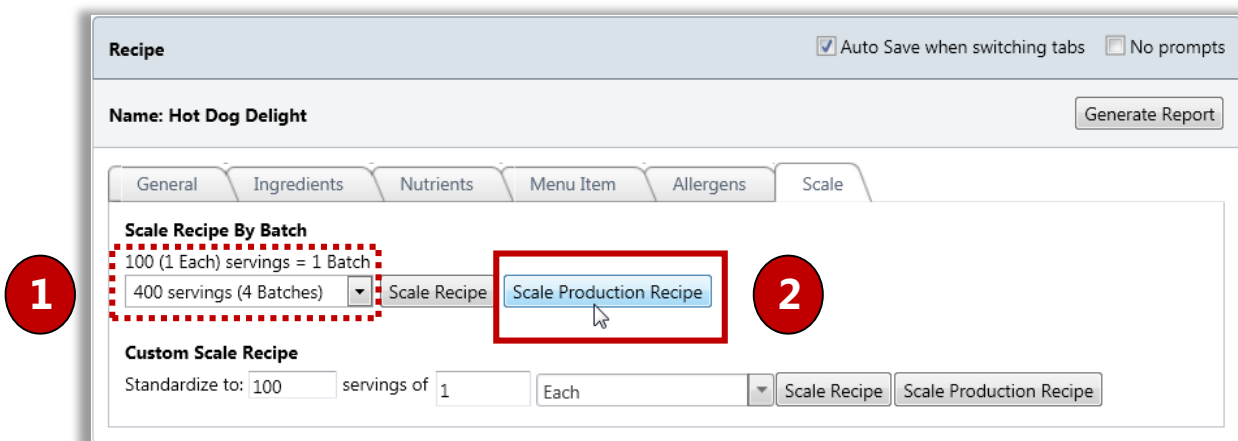


## Tab 6: Scale

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

### To scale a Production recipe by Batch:

1. Select the number of batches.
2. Click  .



**To scale a recipe by servings**

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

Generated on: 11/15/2013 10:35:23 AM

### Hot Dog Delight (LR300070)

CONTAINS COUNTY

Contains Egg, Gluten, Wheat  
Processed in a facility that also processes Milk, Soy  
May contain Crustacean Shellfish

Number of Servings: 400      Serving Size: 1 Each  
Moisture gain/loss%: 0.0000      Yield: 44 Pound, 1 1/2 Ounce  
Waste gain/loss%: 0.0000      Fat gain/loss% : 0.0000

Stock Item#	Stock Item	Stock Quantity	Ingredient Name	Quantity	Picture
SS-TSB-3925	Home Run Hot Dog Buns , as purchased	400 Roll	Hot Dog Buns L1100048	400 Roll	

**Pre-Preparation Instructions**  
• Franks must be par-boiled.

**Serving Instructions**  
• Condiments are served in packets.

**Preparation Instructions**  
• 1. Open roll.  
• 2. Place roll on baking sheet.

CCP Name	CCP Description	Critical Temperature	Corrective Action
Cook	Cooking	165.00	Continue cooking food until the internal temperature reaches the required temperature.

**Nutritional Information**

	Fat	SFat	Carb	Protein	Sugar
% of Calories	40.00	3.75	58.89	6.67	(M)

**Nutrients per 100 g**

FE (Kcal)	Fat (g)	Sfat (g)
720.000	32.000	3.000

**Scale Production Recipe by Batch**

Generated on: 11/15/2013 10:44:34 AM

### LR300070 - Hot Dog Delight

CONTAINS COUNTY

Scaled for 400(1 Each) servings

Contains Egg, Gluten, Wheat  
Processed in a facility that also processes Milk, Soy  
May contain Crustacean Shellfish

**Pre-Preparation Instructions**  
• Franks must be par-boiled.

(1) This nutrient was added  
(2) Please enter either "Actu  
(3) Please enter either "Actu  
(4) Please enter either "Actu  
(5) Please enter either "Actu

Stock Item# / Recipe Code	Stock Item / Recipe Name	Stock Quantity	Directions	Picture
SS-TSB-3925	Home Run Hot Dog Buns , as purchased	400 Roll	1. Open roll. 2. Place roll on baking sheet.	

**Serving Instructions**  
• Condiments are served in packets.

CCP Name	CCP Description	Critical Temperature	Corrective Action
Cook	Cooking	165.00	Continue cooking food until the internal temperature reaches the required temperature.

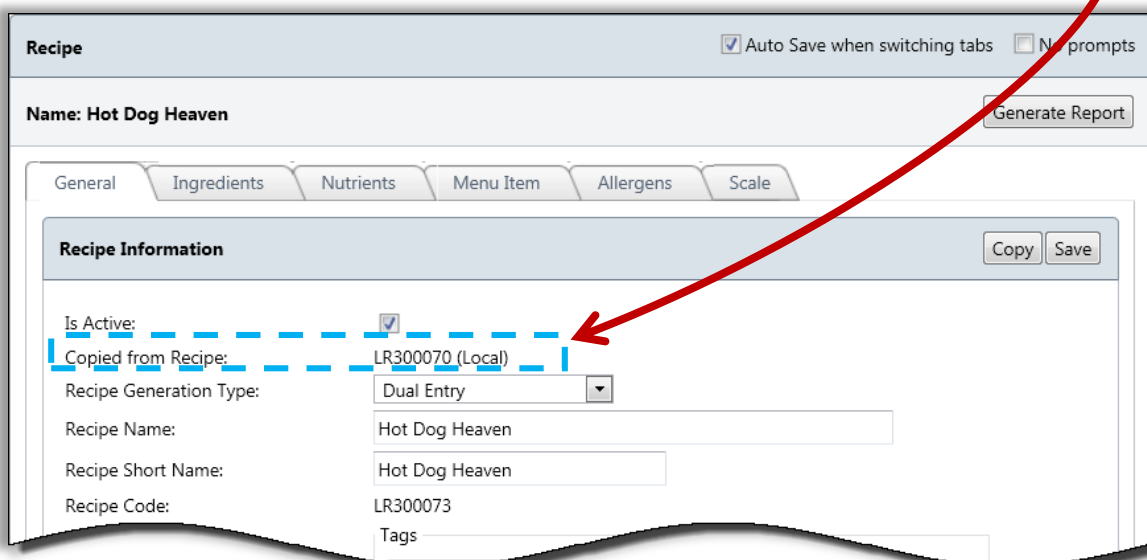
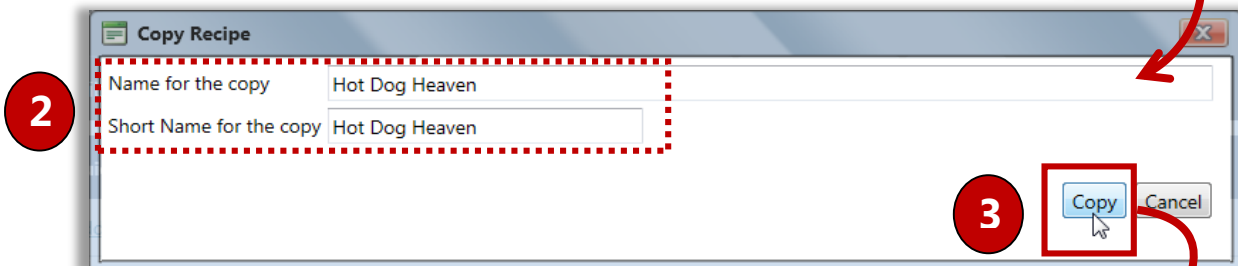
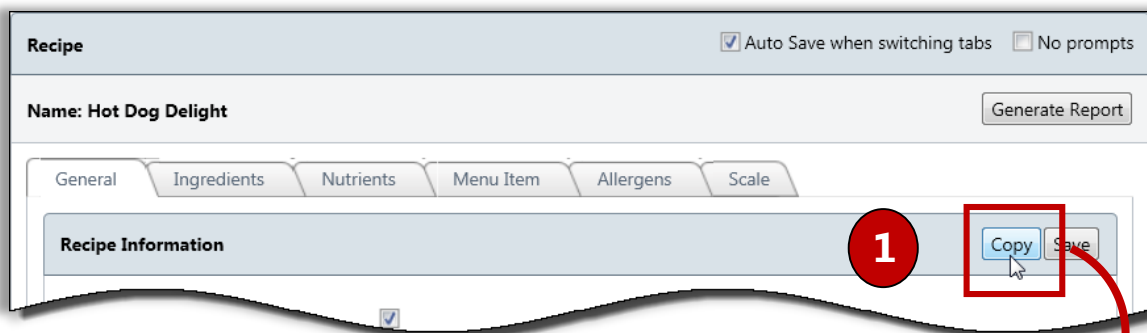
## Copying a Recipe

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

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

### To copy a recipe:

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



## Working with Single Ingredient (SI) Recipes

When a Recipe is created from a single ingredient (see “**Creating a Single Ingredient Recipe**”, page 29), two new tabs appear: **Recipe** and **Menu Item**. Refer to page 40 for a review of the **Menu Item** tab.

The **Recipe** tab is unique to SI recipes and includes much of the information shown on the **General** tab for multiple ingredient recipes.

### Recipe Tab

**Ingredient**  Auto Save when switching tabs  No prompts

Name: Hit 'Em Out of the Park Hot Dog Generate Report

General **Nutrients** Allergens Buying Guide Labels (1)

**Ingredient Information** Copy Save

Copied from Ingredient: LI100070 (Local)  
 Ingredient Code: LI100071  
 Is Active:   
 Ingredient Name: Hit 'Em Out of the Park Hot Dog  
 Ingredient Short Name: Hit 'Em Out of the Park Hot Dog  
 Ingredient Form: As Purchased

**Create Recipe**

---

**Ingredient**  Auto Save when switching tabs  No prompts

Name: Hit 'Em Out of the Park Hot Dog Generate Report

General **Nutrients** Allergens Buying Guide **Recipe** Menu Item Labels (1)

**Recipe Information** Save

Is Active:   
 Recipe Generation Type: Single Ingredient  
 Recipe Name: Hit 'Em Out of the Park  
 Recipe Short Name: Hit 'Em Out of the Park  
 Recipe Code: LR300094  
 Strict Batching:   
 Tags  
 Enter the name of the tag or select from the list... +  
 meat (3)  
 Meat / Meat Alternate (5)  
 Quantity: 1 Each  
 Serving Size: 1 Each  
 Number of Servings: 1.00  
 114.000 grams

Clear to discontinue the SI Recipe; clearing this setting changes the Recipe status to “Discontinued” but does not affect any Recipes that include the ingredient

### General Tab

The **General** tab shown for SI recipes includes general ingredient information and Serving Measures for the ingredient.

**Ingredient**  Auto Save when switching tabs  No prompts

Name: Hit 'Em Out of the Park Hot Dog Generate Report

General | Nutrients | Allergens | Buying Guide | Recipe | Menu Item | Labels (1)

**Ingredient Information** Copy Save

Copied from Ingredient: LI100070 (Local)  
Ingredient Code: LI100071  
**Is Active:**   
Ingredient Name: Hit 'Em Out of the Park Hot Dog  
Ingredient Short Name: Hit 'Em Out of the Park Hot Dog  
Ingredient Form: As Purchased

Manufacturer: George's Pride  
Product Code: GP-034-HD  
Commodity/Recipe Code:

Tags  
Enter the name of the tag or select from the list... +  
meat (4)  
Meat / Meat Alternate (4)

**Serving Measures**


Serving Size:   Weight:   Add  
[Add new unit...](#)  Preferred Measurement

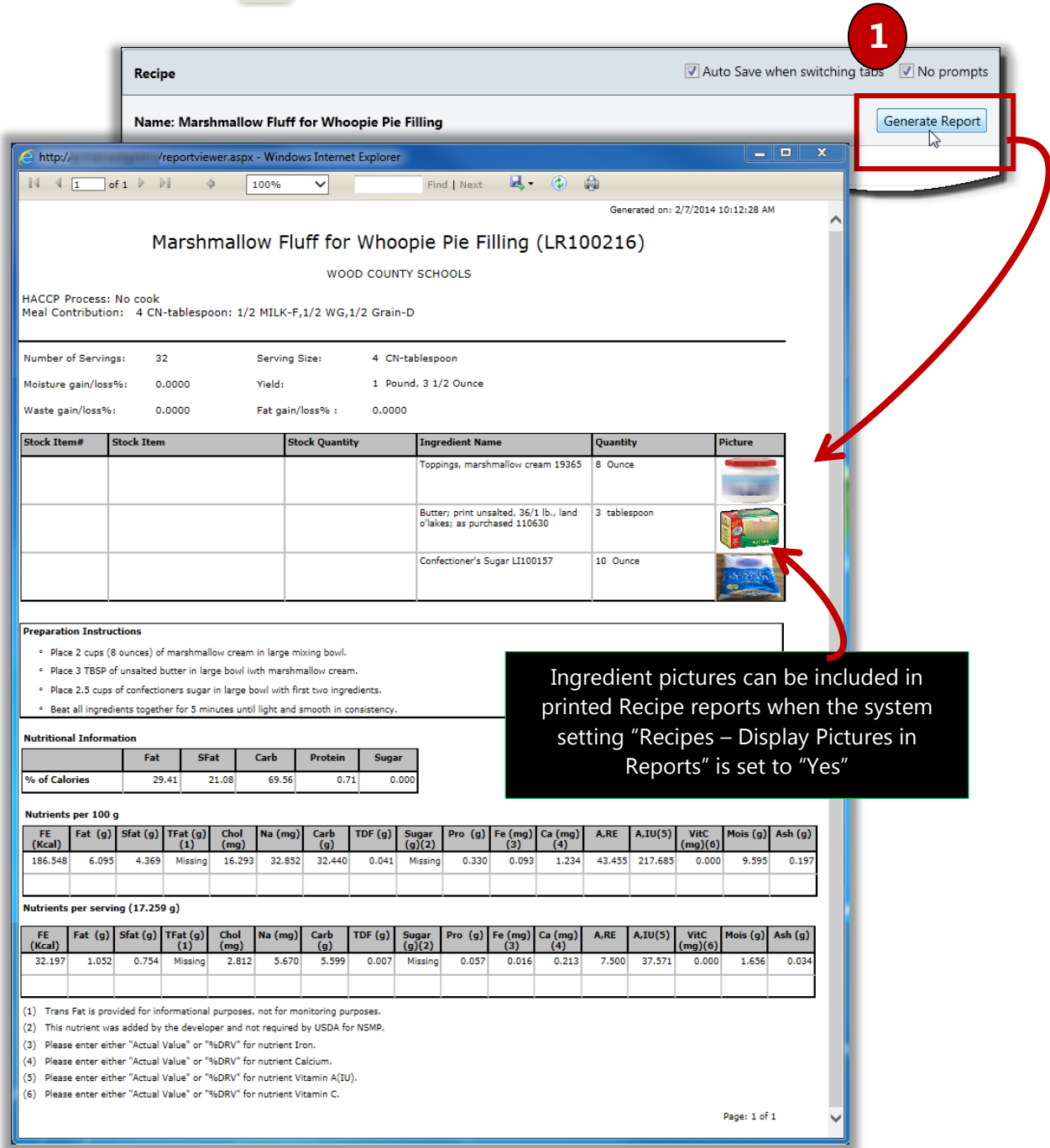
Serving Size	Weight In Grams	Preferred Measurement	Edit	Delete
1 Each (Local V1)	114.000	<input type="checkbox"/>		

Clear to discontinue the Ingredient; clearing this setting changes the Ingredient status to "Discontinued" but does not affect any Recipes that include the ingredient

## Generating a Recipe Report

### To generate and print a recipe report

1. Click **Generate Report** in the **Recipe** header.
2. Click **Print** (  ) on the window toolbar.



**Recipe**  Auto Save when switching tabs  No prompts

Name: Marshmallow Fluff for Whoopie Pie Filling

**Generate Report**




Generated on: 2/7/2014 10:12:28 AM

### Marshmallow Fluff for Whoopie Pie Filling (LR100216)

WOOD COUNTY SCHOOLS

HACCP Process: No cook  
Meal Contribution: 4 CN-tablespoon: 1/2 MILK-F,1/2 WG,1/2 Grain-D

Number of Servings: 32      Serving Size: 4 CN-tablespoon  
Moisture gain/loss%: 0.0000      Yield: 1 Pound, 3 1/2 Ounce  
Waste gain/loss%: 0.0000      Fat gain/loss% : 0.0000

Stock Item#	Stock Item	Stock Quantity	Ingredient Name	Quantity	Picture
			Toppings, marshmallow cream 19365	8 Ounce	
			Butter: print unsalted, 36/1 lb., land o'lakes; as purchased 110630	3 tablespoon	
			Confectioner's Sugar LI100157	10 Ounce	

**Preparation Instructions**

- Place 2 cups (8 ounces) of marshmallow cream in large mixing bowl.
- Place 3 TBSP of unsalted butter in large bowl with marshmallow cream.
- Place 2.5 cups of confectioners sugar in large bowl with first two ingredients.
- Beat all ingredients together for 5 minutes until light and smooth in consistency.

**Nutritional Information**

	Fat	SFat	Carb	Protein	Sugar
% of Calories	29.41	21.08	69.56	0.71	0.000

**Nutrients per 100 g**

FE (Kcal)	Fat (g)	Sfat (g)	TFat (g)(1)	Chol (mg)	Na (mg)	Carb (g)	TDF (g)	Sugar (g)(2)	Pro (g)	Fe (mg)(3)	Ca (mg)(4)	A,RE	A,IU(5)	VitC (mg)(6)	Mois (g)	Ash (g)
186.548	6.095	4.369	Missing	16.293	32.852	32.440	0.041	Missing	0.330	0.093	1.234	43.455	217.685	0.000	9.595	0.197

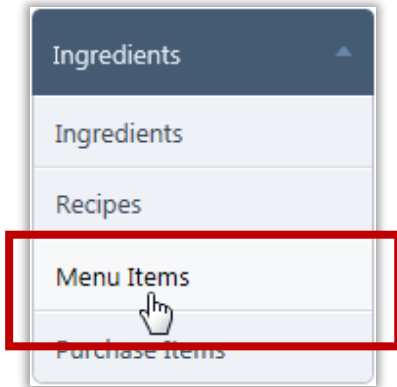
**Nutrients per serving (17.259 g)**

FE (Kcal)	Fat (g)	Sfat (g)	TFat (g)(1)	Chol (mg)	Na (mg)	Carb (g)	TDF (g)	Sugar (g)(2)	Pro (g)	Fe (mg)(3)	Ca (mg)(4)	A,RE	A,IU(5)	VitC (mg)(6)	Mois (g)	Ash (g)
32.197	1.052	0.754	Missing	2.812	5.670	5.599	0.007	Missing	0.057	0.016	0.213	7.500	37.571	0.000	1.656	0.034

(1) Trans Fat is provided for informational purposes, not for monitoring purposes.  
 (2) This nutrient was added by the developer and not required by USDA for NSMP.  
 (3) Please enter either "Actual Value" or "%DRV" for nutrient Iron.  
 (4) Please enter either "Actual Value" or "%DRV" for nutrient Calcium.  
 (5) Please enter either "Actual Value" or "%DRV" for nutrient Vitamin A(IU).  
 (6) Please enter either "Actual Value" or "%DRV" for nutrient Vitamin C.

Page: 1 of 1

# Menu Items



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

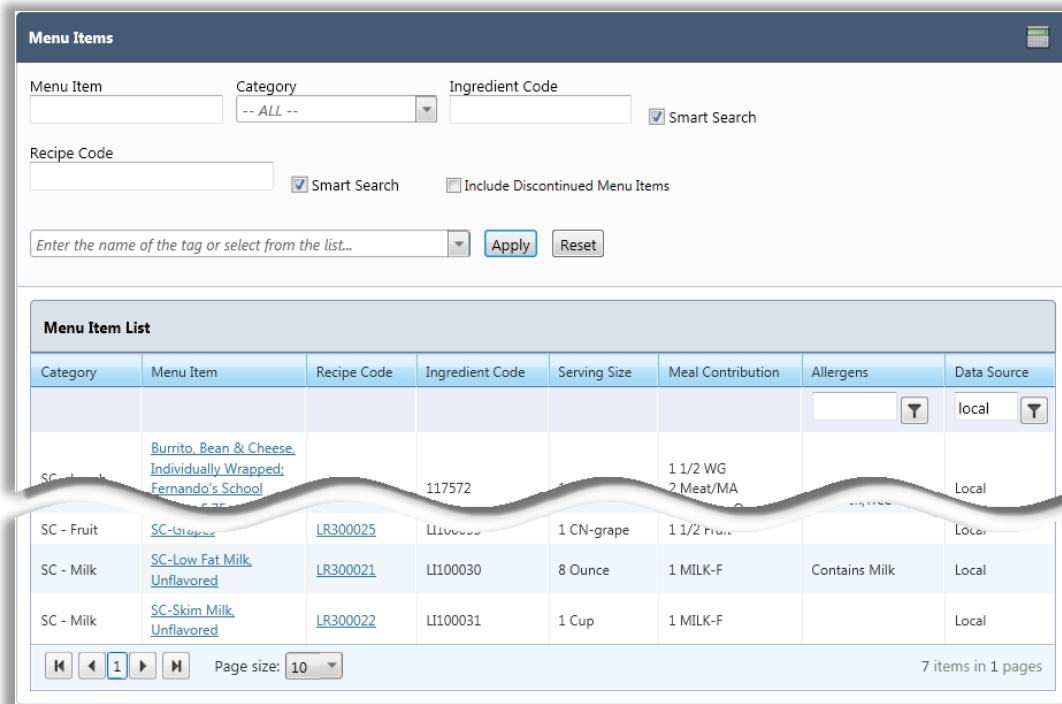
Ingredient Code and Recipe Code searches build a smart list of items that match the search string(s) as you enter them.

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

Menu Item particulars

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

## Menu Items Page





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

- **Category** is set to “ALL”.

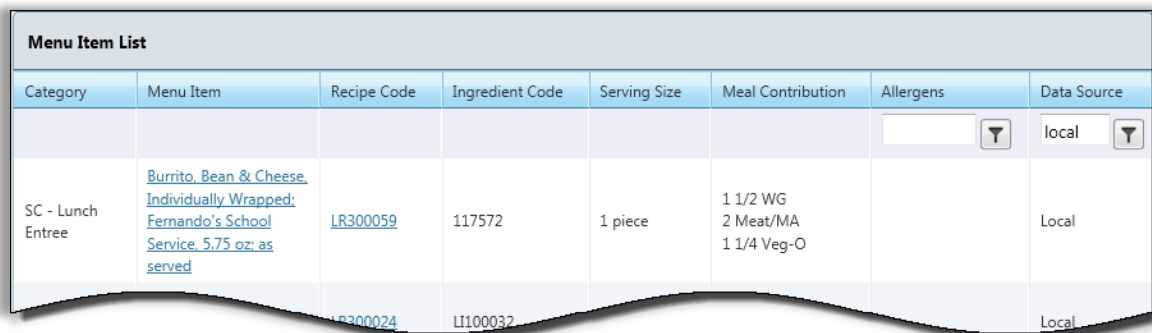


- **Menu Item, Ingredient Code, Recipe Code** and [Tags] are blank.
- **Ingredient Code Smart Search** and **Recipe Smart Search** are selected.
- **Include Discontinued Menu Items** is cleared.
- All *active* menu items are displayed in the **Menu Item List**.

### Page Functions

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

### Menu Item List Listings



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

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


## Searching for a Menu Item

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

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

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

### To search for a Menu Item:

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

**1**

**2**

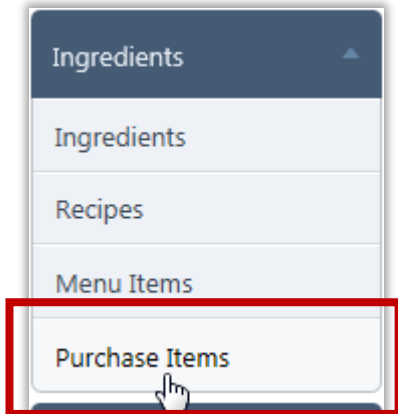
Click to display the **Recipe** tab on the **Ingredients** page

Click to display the **Menu Item** tab on the **Ingredients** page

Category	Menu Item	Recipe Code	Ingredient	Quantity	Measure	Local	Data Source
SC - Lunch Entree	<a href="#">Beef, Precooked; Sandwichmaker roast beef, chunked &amp; formed 2 piece, as purchased</a>	<a href="#">LR300050</a>	107087	2 Ounce	1 WG 2 Meat/MA	Local	local
SC - Lunch Entree	<a href="#">Beef, sandwich steaks, flaked, chopped, formed and thinly sliced, raw</a>	<a href="#">LR300051</a>	13342	1 CN-Serving	2 Non-WG 2 1/2 Meat/MA	Local	local
SC - Lunch Entree	<a href="#">Sandwiches, Barbecued chicken, on roll with fresh onions</a>	<a href="#">LR300055</a>	50141	1 CN-sandwich	2 WG 2 Meat/MA	Local	local

Page Size: 10 | 6 items in 1 pages

# Purchase Items



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

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

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

## Purchase Items Page


The screenshot shows the 'Purchase Items' page in a web application. At the top, there is a 'Data Source' dropdown set to 'Local' and an 'Apply' button. Below this is a table with the following columns: Description, DataSource, Whole Unit, Broken Unit, Broken Unit Size, Broken Unit Weight, Broken Units per Whole Unit, Fair Market Value/Standard Price, and Stock Item. The table contains several rows of data, including items like '1% MILK, 8 OZ CARTON', '1% MILK, GALLON', 'ALMONDS, SLICED, NATURAL', 'ANIMAL CRACKERS', 'APPLES Red Delicious', 'APPLES, SLICED, CANNED(106003)', 'APPLES, SLICED, SOLID PACK(206008)', 'APPLESAUCE(206010)', 'APRICOTS CUPS, FRZ', and 'ASIAN BASE SAUCE'. At the bottom of the table, there is a pagination control showing 'Page size: 10' and a list of page numbers from 1 to 10.

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

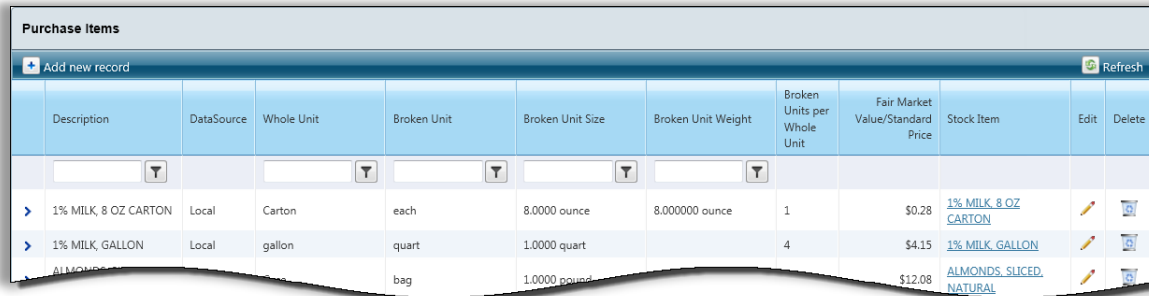
By default on the **Purchase Items** page:



- **Data Source** is set to “local”.

**Page Functions**

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

**Purchase Items Listings**




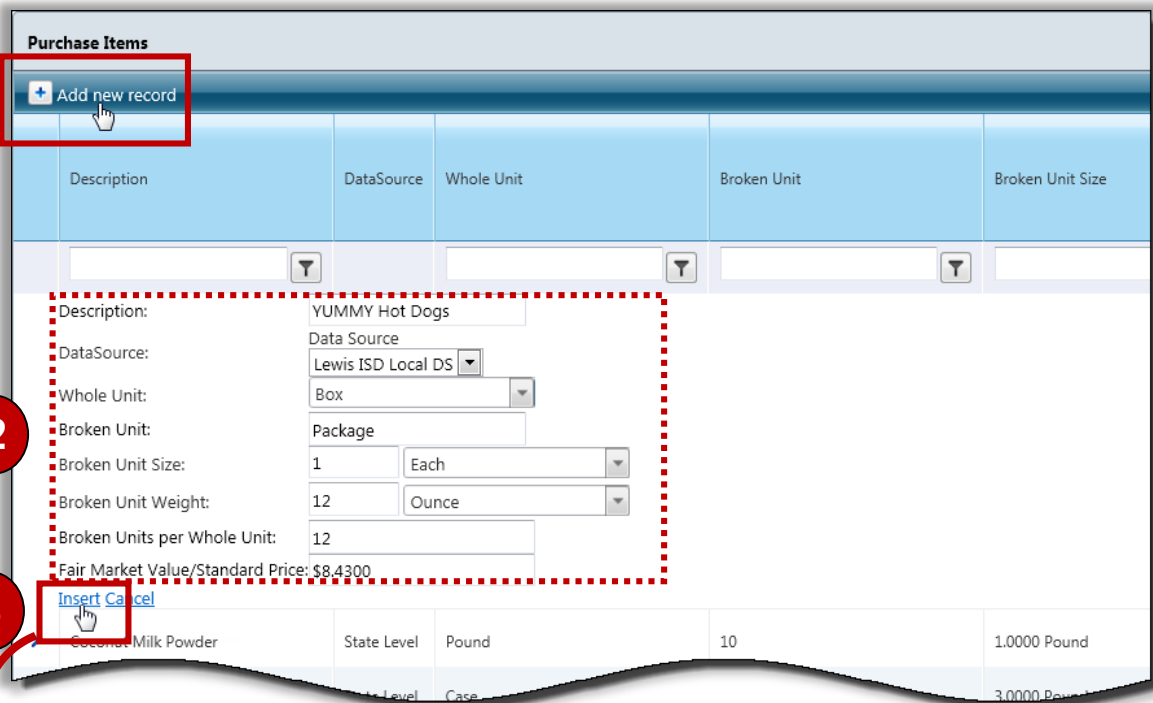
Header Name	Data Type	Description
Description	View only	<i>Sortable</i> ; ingredient short description
Data Source	View only	Data location (database) of purchase item
Whole Unit	View only	Description of a purchasable unit sold as “one”
Broken Unit	View only	Description of the individual units that make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

## Adding a New Purchase Item

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

### To add a new Purchase Item:

1. Click .
2. Enter Purchase Item details.
3. Click the [Insert](#) link.



The screenshot shows the 'Purchase Items' interface. A red circle with the number '1' highlights the '+ Add new record' button. A red circle with the number '2' highlights the form fields for entering details, including Description, DataSource, Whole Unit, Broken Unit, Broken Unit Size, Broken Unit Weight, and Broken Units per Whole Unit. A red circle with the number '3' highlights the 'Insert' link. A green message box at the bottom indicates 'Purchase Item added successfully.'

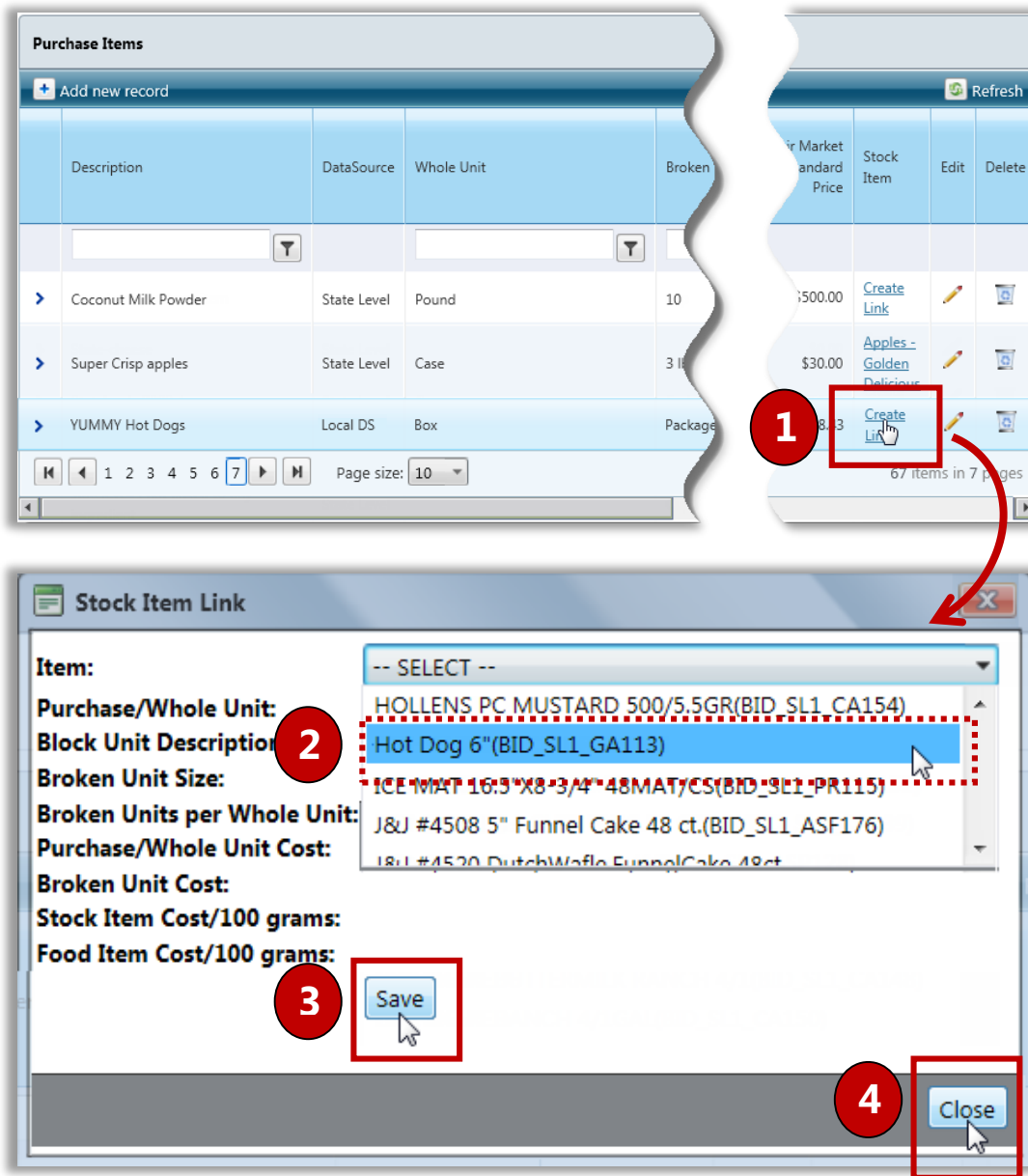
Description	DataSource	Whole Unit	Broken Unit	Broken Unit Size
YUMMY Hot Dogs	Lewis ISD Local DS	Box	Package	1 Each
State Level Milk Powder	State Level	Pound	10	1.0000 Pound
State Level Milk Powder	State Level	Case	30	3.0000 Pound

## Creating a Link to a Stock Item

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

### To create a Purchase Item link:


1. Click the [Create Link](#) link in the **Purchase Items** listing.
2. Select the stock item.
3. Click  .
4. Click  .

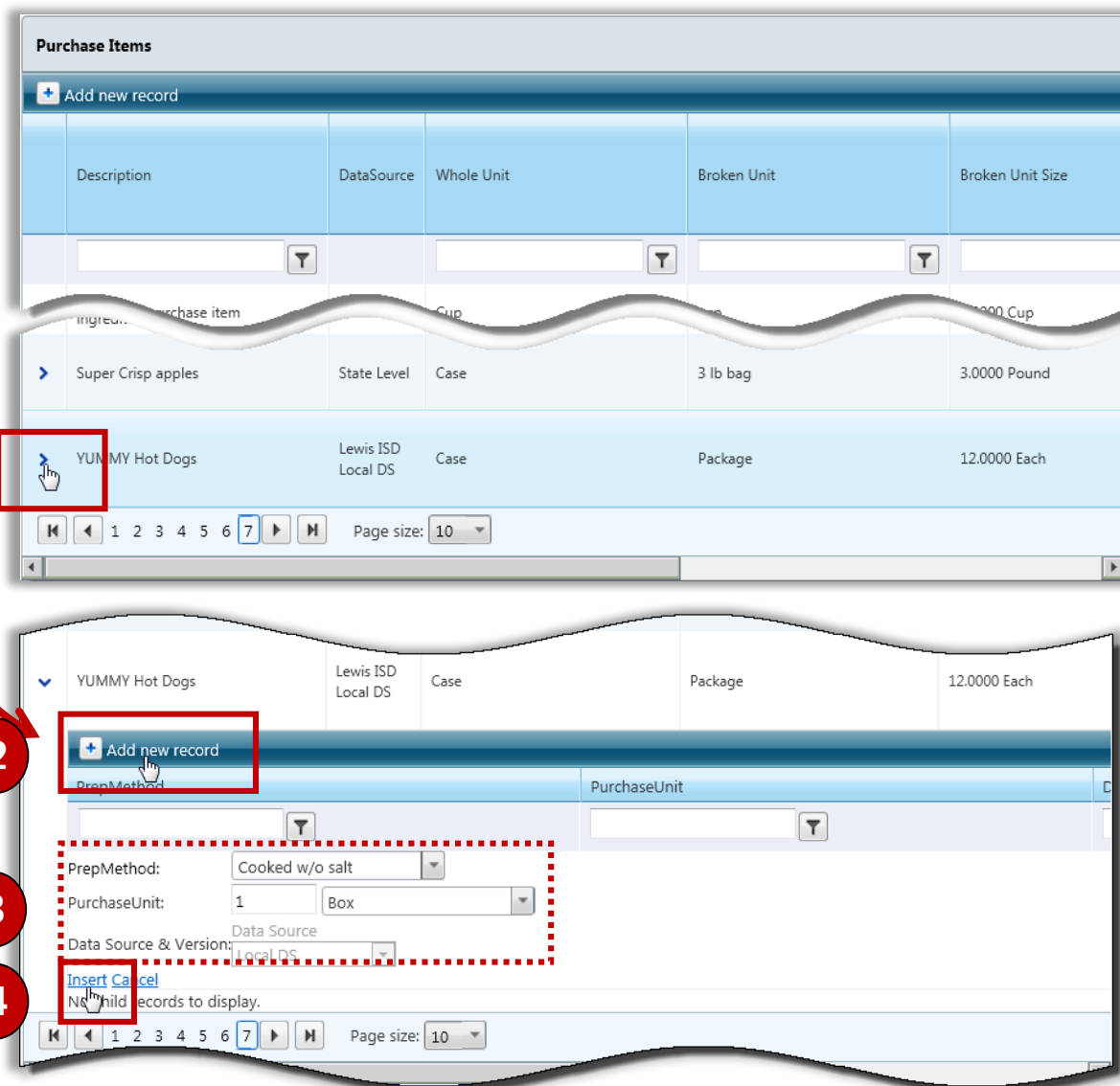


## Adding an Ingredient Form to a Purchase Item

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

### To add an Ingredient form to a Purchase Item:

1. Expand a purchase item listing.
2. Click .
3. Select form details.
4. Click the [Insert](#) link.




The screenshot illustrates the process of adding an ingredient form to a purchase item in a software application. It is divided into two parts, with numbered callouts (1-4) indicating the steps.

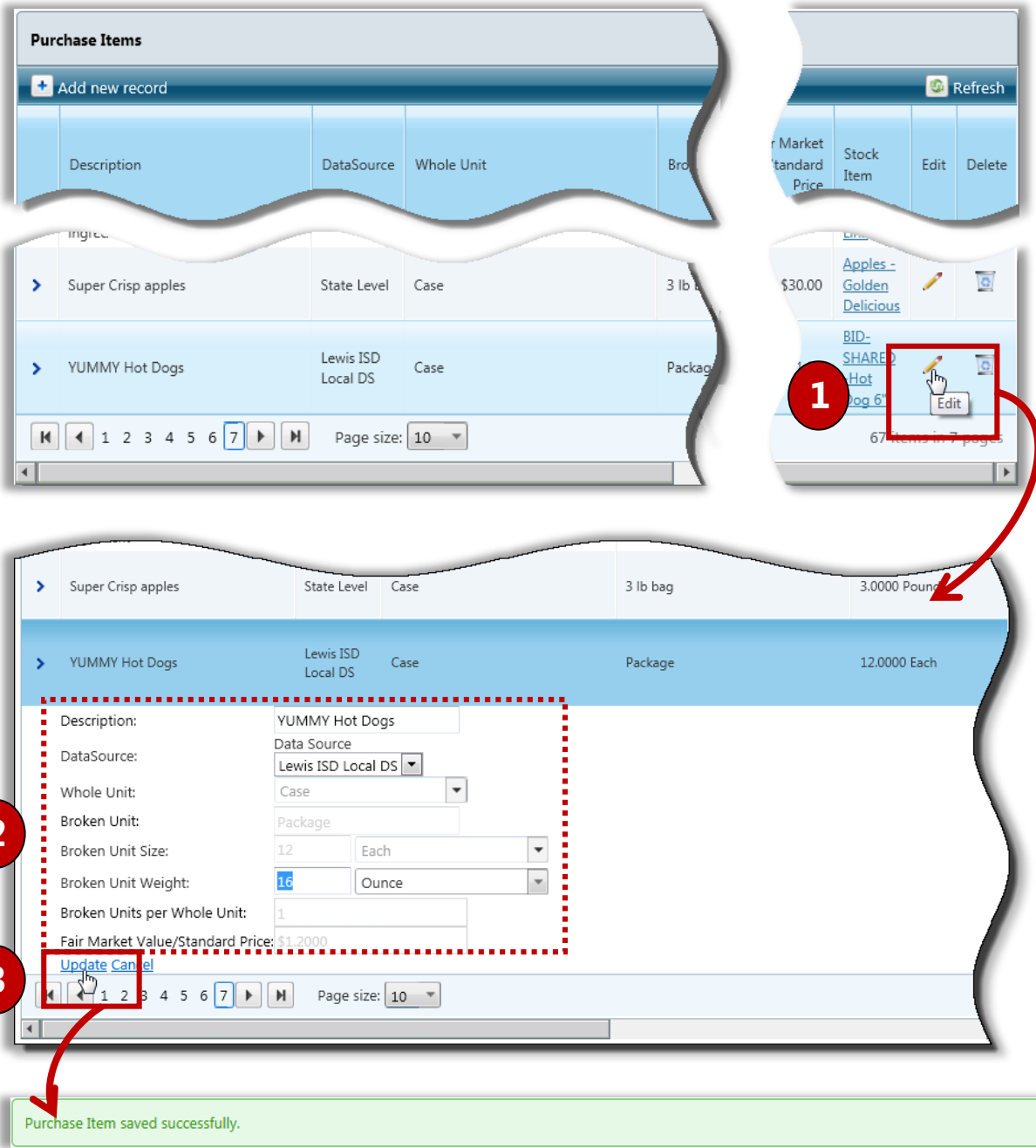
**Top Screenshot (Step 1):** Shows a table titled "Purchase Items". The table has columns: Description, DataSource, Whole Unit, Broken Unit, and Broken Unit Size. The row for "YUMMY Hot Dogs" is selected and highlighted in blue. A red circle with the number "1" and an arrow points to the expandable arrow icon on the left of this row.

**Bottom Screenshot (Steps 2-4):** Shows the expanded view for "YUMMY Hot Dogs". A red circle with the number "2" and an arrow points to the "Add new record" button at the top of the form. A red circle with the number "3" and an arrow points to the "PrepMethod" dropdown menu, which is currently set to "Cooked w/o salt". A red circle with the number "4" and an arrow points to the "Insert" link at the bottom of the form. The form also includes fields for "PurchaseUnit" (set to "Box"), "Data Source & Version" (set to "Local DS"), and a "No child records to display." message.

## Updating Purchase Item Details

### To update Purchase Item details:


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

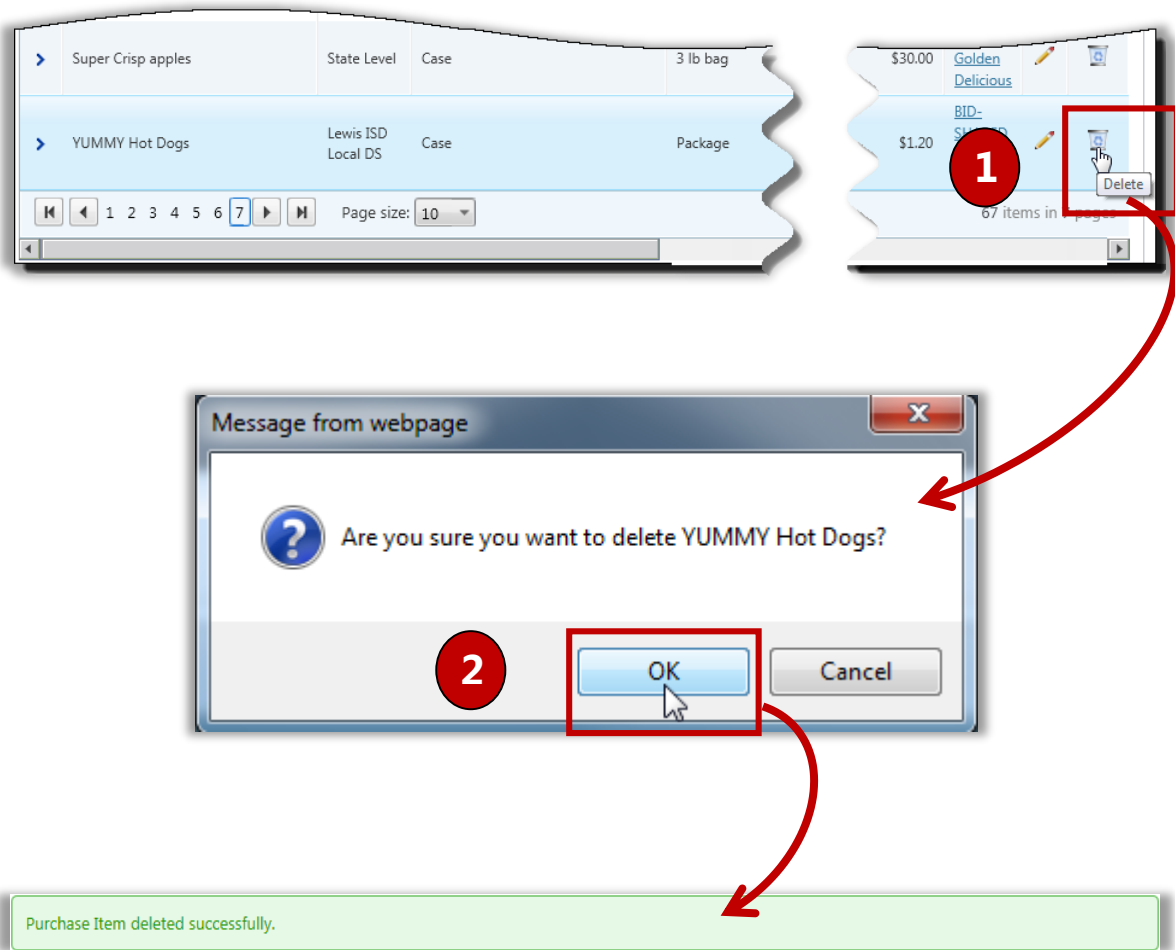




## Deleting a Purchase Item

### To delete a Purchase Item

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



◀ *End of Section* ▶

# 3


## Menus

In this chapter you will learn:

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



## Menus at a Glance

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

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

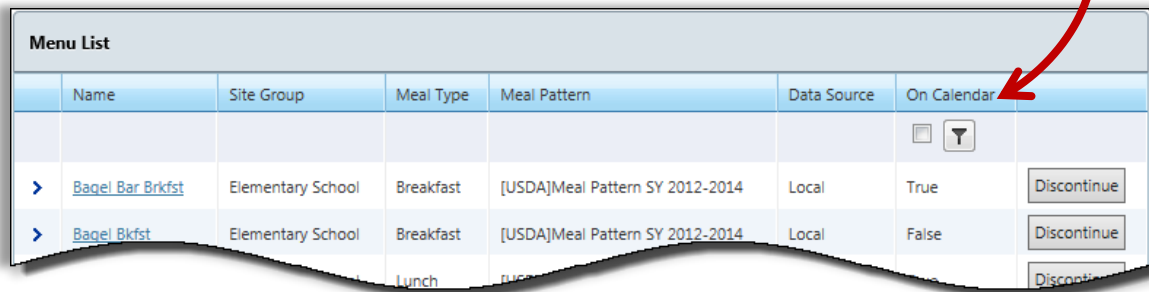





**Page Functions**

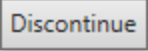
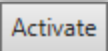
Button/Link	Description
	Click to display all recipe records in the <b>Recipe List</b> that match the set search conditions.
	Click to return all search criteria fields to the default settings.

**Menu List Listings**

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




Menu List						
Name	Site Group	Meal Type	Meal Pattern	Data Source	On Calendar	
> <a href="#">Bagel Bar Brkfst</a>	Elementary School	Breakfast	[USDA]Meal Pattern SY 2012-2014	Local	True	
> <a href="#">Bagel Bkfst</a>	Elementary School	Breakfast	[USDA]Meal Pattern SY 2012-2014	Local	False	
		Lunch				

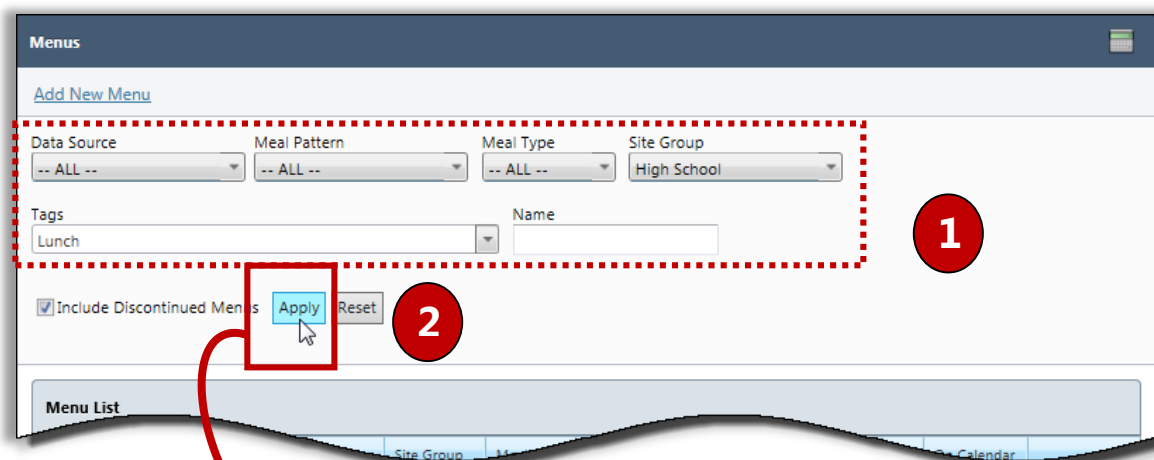
Header Name	Data Type	Description
Name	View only	Menu name
Site Group	View only	<i>Sortable</i> ; Site Group to which the menu is assigned
Meal Type	View only	<i>Sortable</i> ; Meal Type on which the menu is based
Meal Pattern	View only	<i>Sortable</i> ; Meal Pattern on which the menu is based
Data Source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

## Searching for a Menu

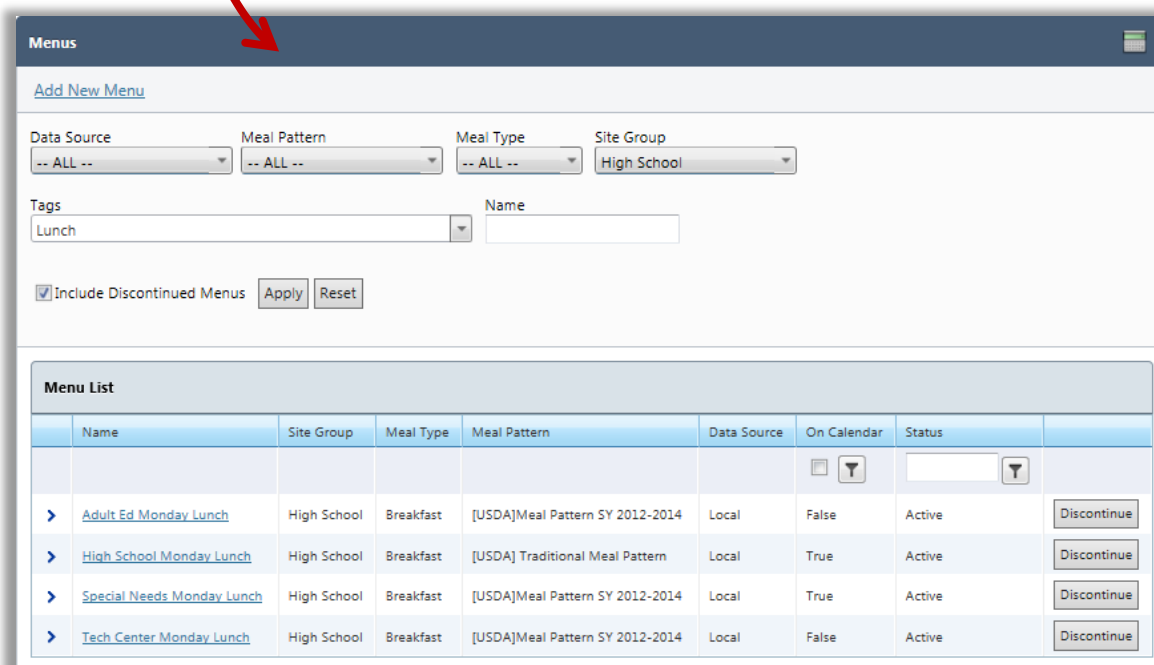
Six separate search conditions can be used to narrow your search for a Menu or group of menus. By default, active Menus are listed. To include discontinued (inactive) Menus, select the **Include Discontinued Menus** option.

### To search for a Menu

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



The screenshot shows the 'Menus' search interface. The search criteria are: Data Source: -- ALL --, Meal Pattern: -- ALL --, Meal Type: -- ALL --, Site Group: High School, Tags: Lunch, and Name: (empty). The 'Include Discontinued Menus' checkbox is checked. The 'Apply' button is highlighted with a red box and a red circle with the number 2. A red circle with the number 1 is also present near the search criteria.



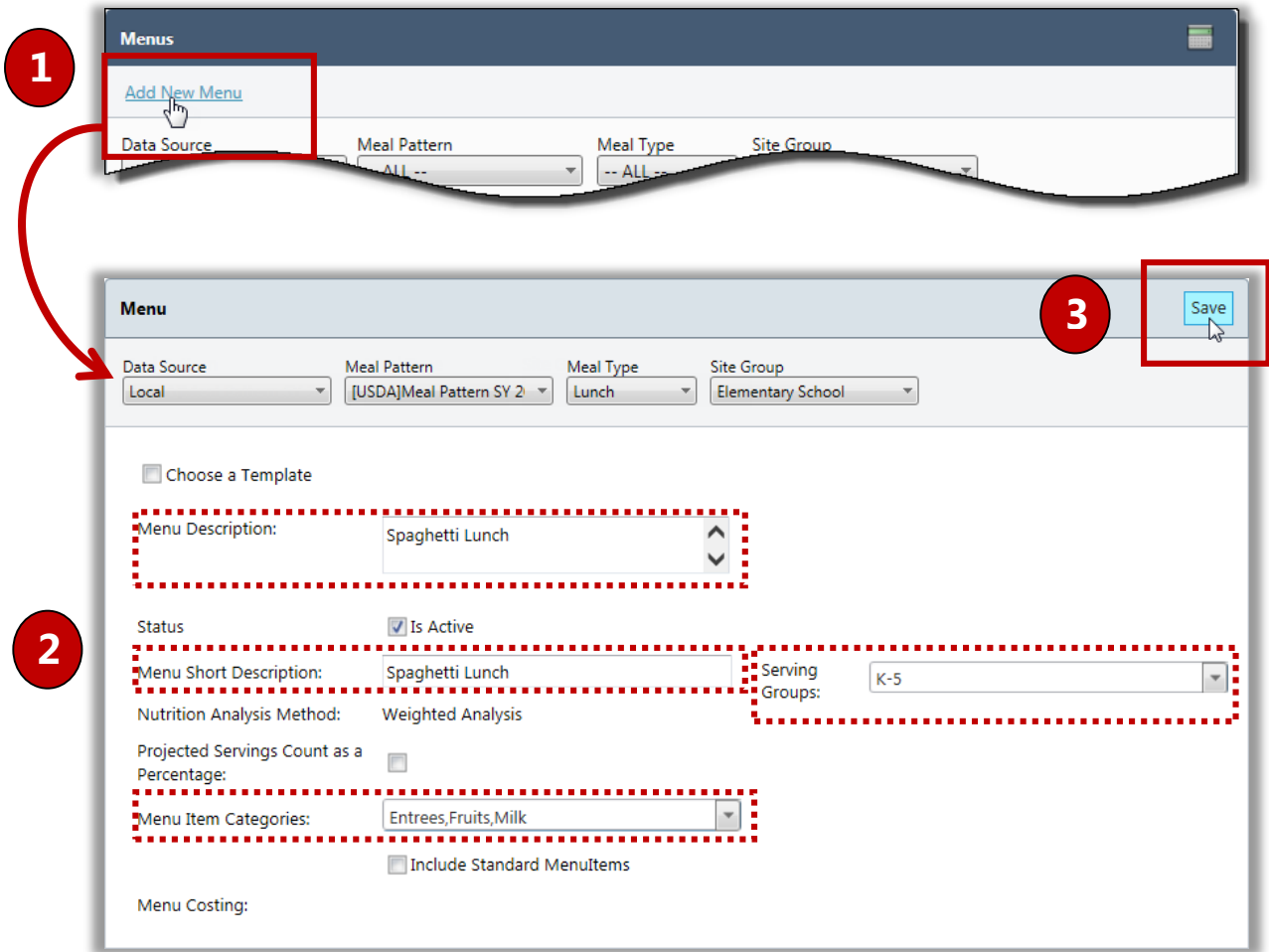
The screenshot shows the 'Menus' search interface with the results table. A red arrow points from the 'Apply' button in the previous screenshot to the top of this screenshot.

Menu List								
	Name	Site Group	Meal Type	Meal Pattern	Data Source	On Calendar	Status	
						<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
>	<a href="#">Adult Ed Monday Lunch</a>	High School	Breakfast	[USDA]Meal Pattern SY 2012-2014	Local	False	Active	<input type="button" value="Discontinue"/>
>	<a href="#">High School Monday Lunch</a>	High School	Breakfast	[USDA] Traditional Meal Pattern	Local	True	Active	<input type="button" value="Discontinue"/>
>	<a href="#">Special Needs Monday Lunch</a>	High School	Breakfast	[USDA]Meal Pattern SY 2012-2014	Local	True	Active	<input type="button" value="Discontinue"/>
>	<a href="#">Tech Center Monday Lunch</a>	High School	Breakfast	[USDA]Meal Pattern SY 2012-2014	Local	False	Active	<input type="button" value="Discontinue"/>

## Adding a Menu

### To add a new Menu

1. Click the [Add New Menu](#) link.
2. Enter and select menu details; when a menu template is not used, select Serving Groups with Projected Meal Counts and Menu Item Categories with number of Choices specified.
3. Click .





## Editing a Menu

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

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

### **To display a list of Menu Calendar assignments for a Menu**

- Display a menu and click the [Show Calendar](#) link.

**Menu Info**

[Add New Menu](#)

⚠ This menu has been assigned to current/past dates on the menu calendar and hence cannot be modified. Please click Edit to view the options of editing this menu on select dates.

**Menu Fiesta Lunch** 1 [Show Calendar](#) Edit Copy Save

Data Source: [Dropdown] Meal Pattern: [USDA]Meal Pattern SY 2 [Dropdown] Meal Type: Lunch [Dropdown] Site Group: Elementary School [Dropdown]

---

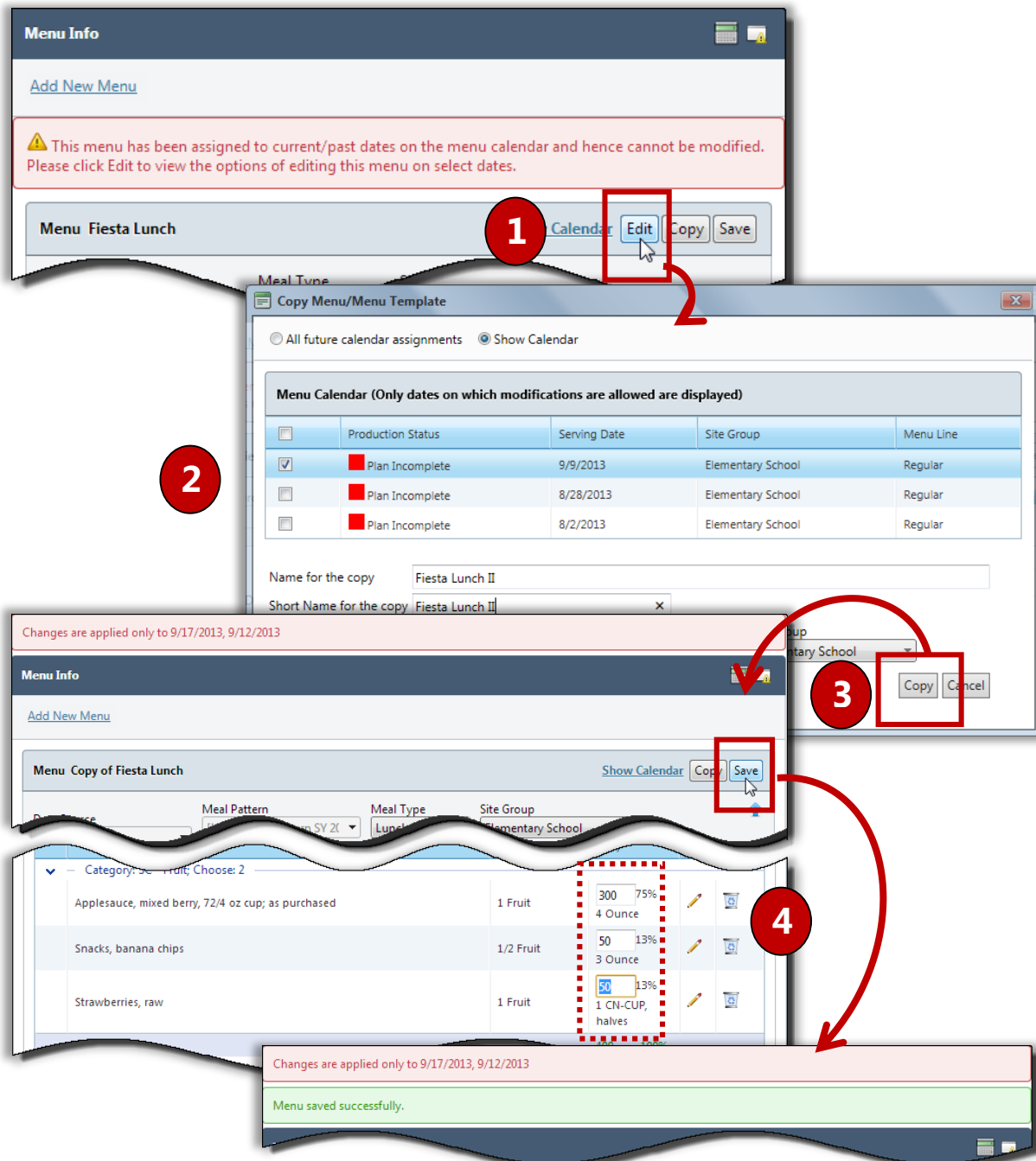
**Menu Calendar**

Production Status	Serving Date	Day	Site Group	Menu Line
Plan Incomplete	9/17/2013	Tuesday	Elementary School	Regular
Plan Incomplete	9/12/2013	Thursday	Elementary School	Regular
Plan Incomplete	8/2/2013	Friday	Elementary School	Regular
Plan Incomplete	5/8/2013	Wednesday	Elementary School	Regular
Plan Incomplete	5/2/2013	Thursday	Elementary School	Regular
Record Complete	4/30/2013	Tuesday	Elementary School	Regular

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

**To edit a Menu with Menu Calendar assignments**

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



## Adding a Menu Item to a Menu

### To add a Menu Item

1. Click the [Add Menu Items](#) link on the Menu Info page.
2. Select one or more menu items.
3. Click .

The image illustrates the process of adding menu items to a menu in three steps:

- Step 1:** On the 'Menu Info' page, click the [Add Menu Items](#) link.
- Step 2:** In the 'Add Menu Item to Menu' modal, select one or more menu items from the list.
- Step 3:** Click the **Add** button to add the selected items to the menu.

The following table shows the menu items available in the 'Add Menu Item to Menu' modal:


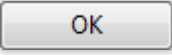
Category	Menu Item (Recipe Code)	Serving Size	Meal Contribution	Allergens	Source
entrees	spaghetti				
<input type="checkbox"/>	Entrees, Traditional Spaghetti and Meatballs, MMA, (SR104665)	1 Serving	3/4 WG 1 3/4 Non-WG 1 3/4 Meat/MA 1/2 Veg-RO	Contains Milk	PDE Shared
<input type="checkbox"/>	Pasta, Spaghetti and Meat Sauce (Ground Beef & Gro (SR102495)	1 Cup (8 oz ladle)	1 Non-WG 2 Meat/MA 3/8 Veg-RO		PDE Shared
<input type="checkbox"/>	Pasta, Spaghetti and Meat Sauce (Ground Turkey), W (SR103500)	1 1/2 Cup	2 WG 2 Meat/MA 1/4 Veg-RO		PDE Shared
<input type="checkbox"/>	Pasta, Spaghetti and Meat Sauce, D-SMS, Non-WG, Ve (SR103877)	1 portion	2 Non-WG 1 1/4 Meat/MA 1/4 Veg-RO		PDE Shared
<input checked="" type="checkbox"/>	Pasta, Spaghetti and Meat Sauce, Elementary D-SMS, (SR103849)	1 portion	1 Non-WG 1 1/4 Meat/MA 1/4 Veg-RO		PDE Shared
<input checked="" type="checkbox"/>	Pasta, Spaghetti and Meatballs, MMA, Non-WG, Veg-R (SR100022)	1 Serving	2 Non-WG 2 Meat/MA 1/4 Veg-RO	Contains Gluten, Milk, Soy, Wheat	PDE Shared
<input type="checkbox"/>	Sauce, Beef Spaghetti Sauce, J.T.M., CP5533, MMA, (SR100970)	5 2/3 ounces	2 Meat/MA 1/2 Veg-RO		PDE Shared

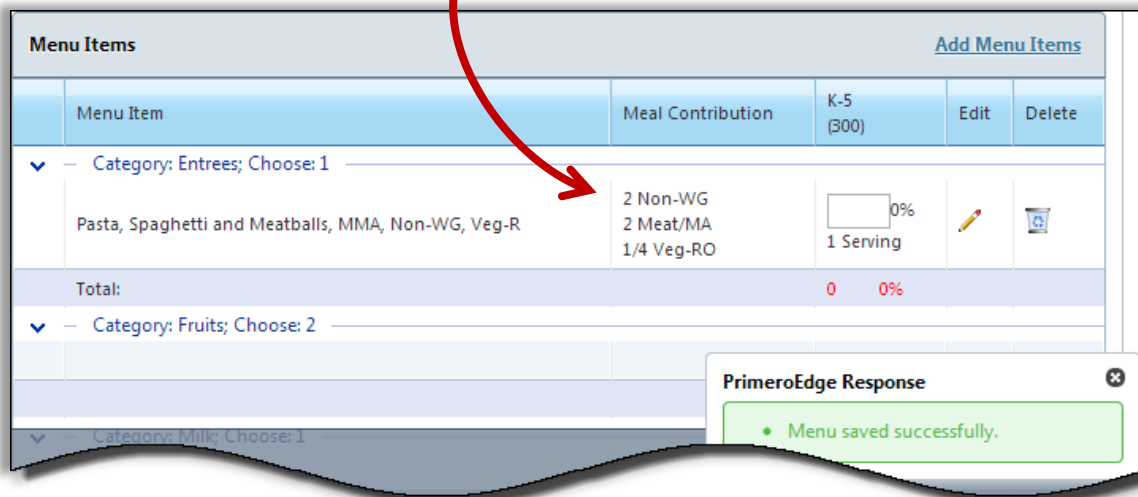
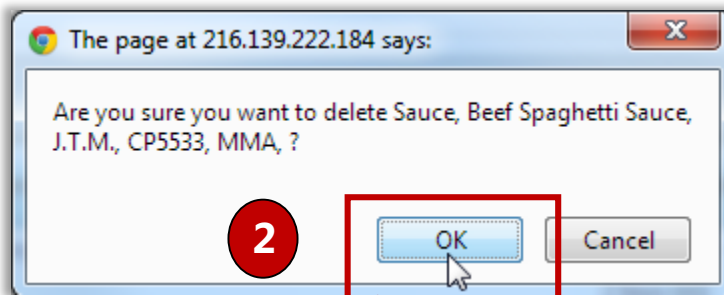
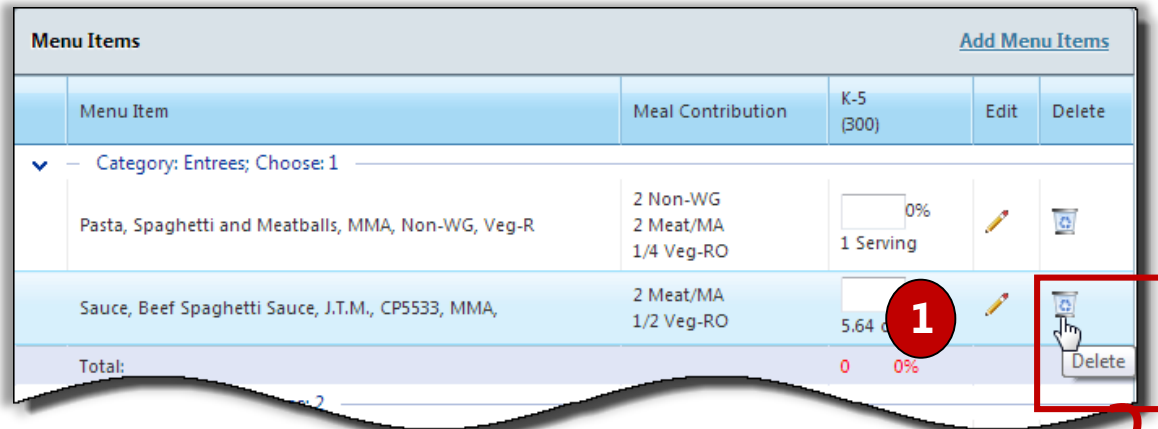
The following table shows the menu items added to the menu:

Menu Item	Meal Contribution	K-5 (300)	Edit	Delete
Category: Entrees; Choose: 1				
Pasta, Spaghetti and Meatballs, MMA, Non-WG, Veg-R	2 Non-WG 2 Meat/MA 1/4 Veg-RO	<input type="text" value="0%"/> 1 Serving	<input type="text" value="0%"/>	<input type="text" value="0%"/>
Sauce, Beef Spaghetti Sauce, J.T.M., CP5533, MMA,	2 Meat/MA 1/2 Veg-RO	<input type="text" value="0%"/> 5.64 ounces	<input type="text" value="0%"/>	<input type="text" value="0%"/>
<b>Total:</b>		<b>0</b>	<b>0%</b>	

## Deleting a Menu Item from a Menu

### To delete a Menu Item

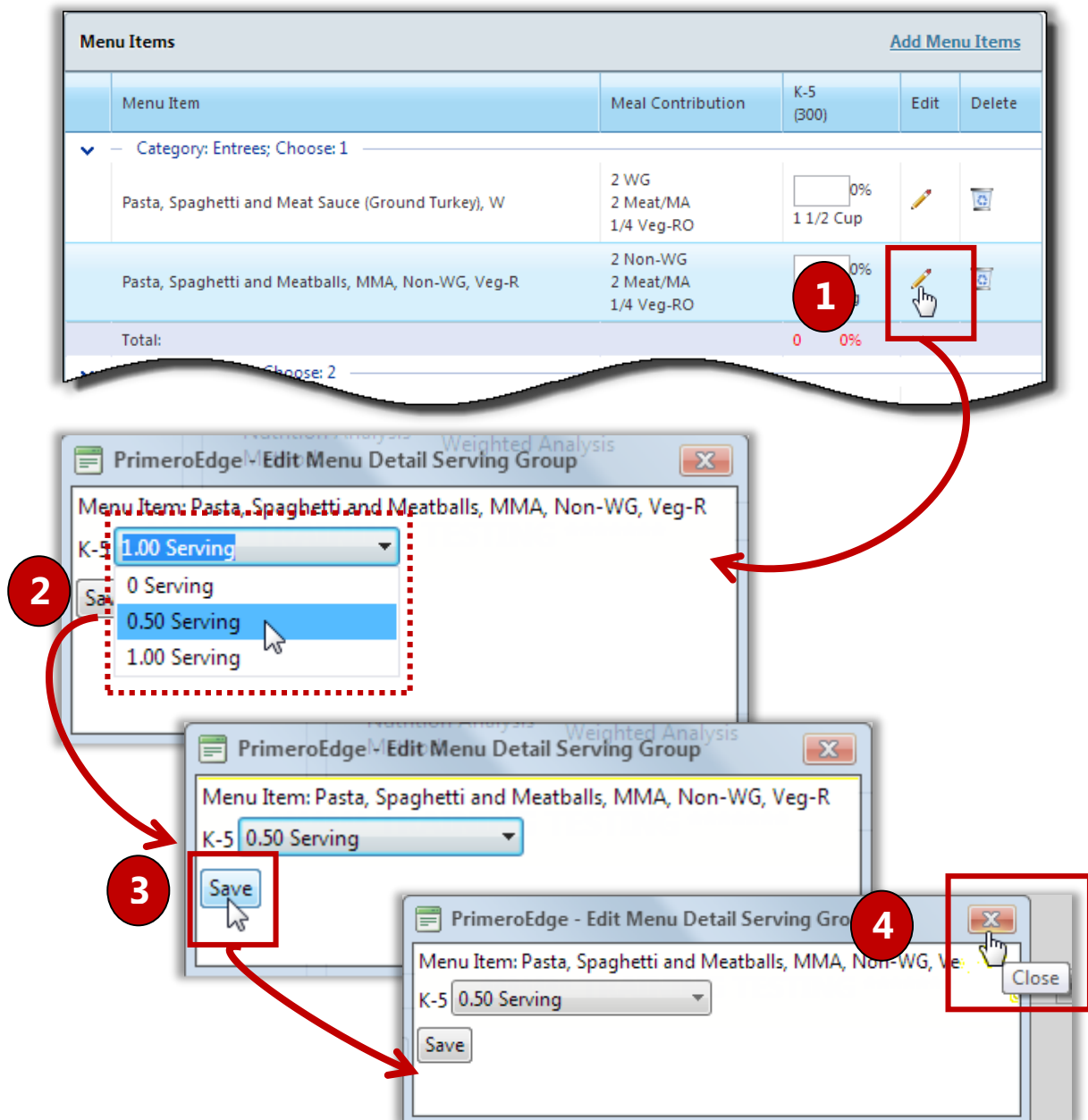
1. Click **Delete** (  ) in the menu item listing on the Menu Info page.
2. Click  in the confirmation message.



## Changing Menu Item Serving Size

### To update Menu Item details


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

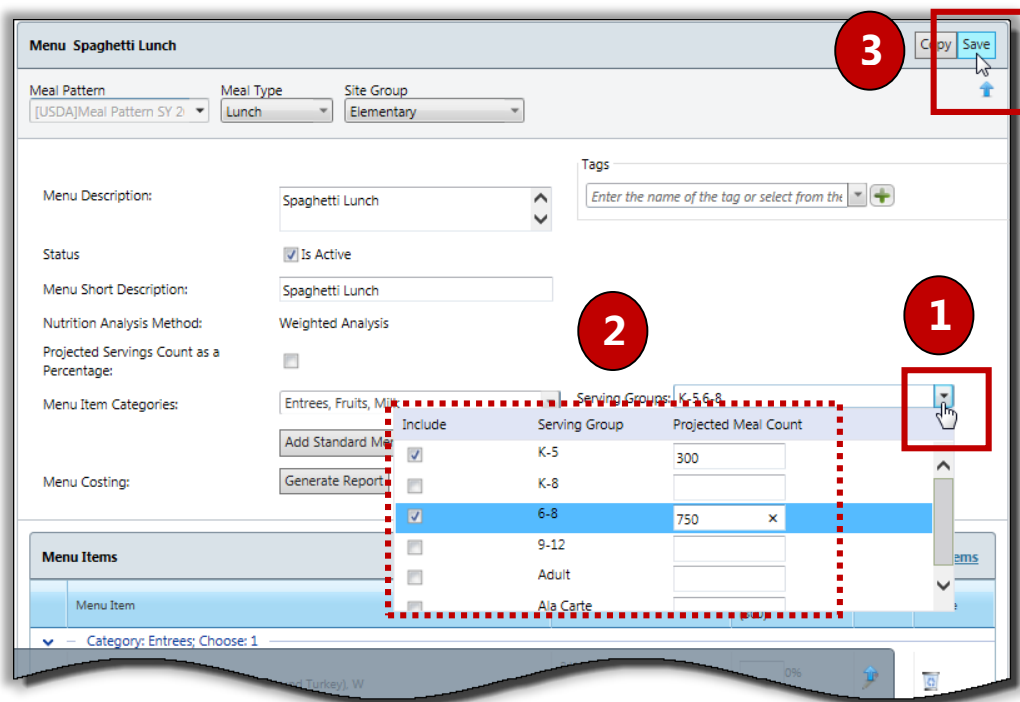


## Changing Serving Groups for a Menu

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

### To update menu Serving Groups


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

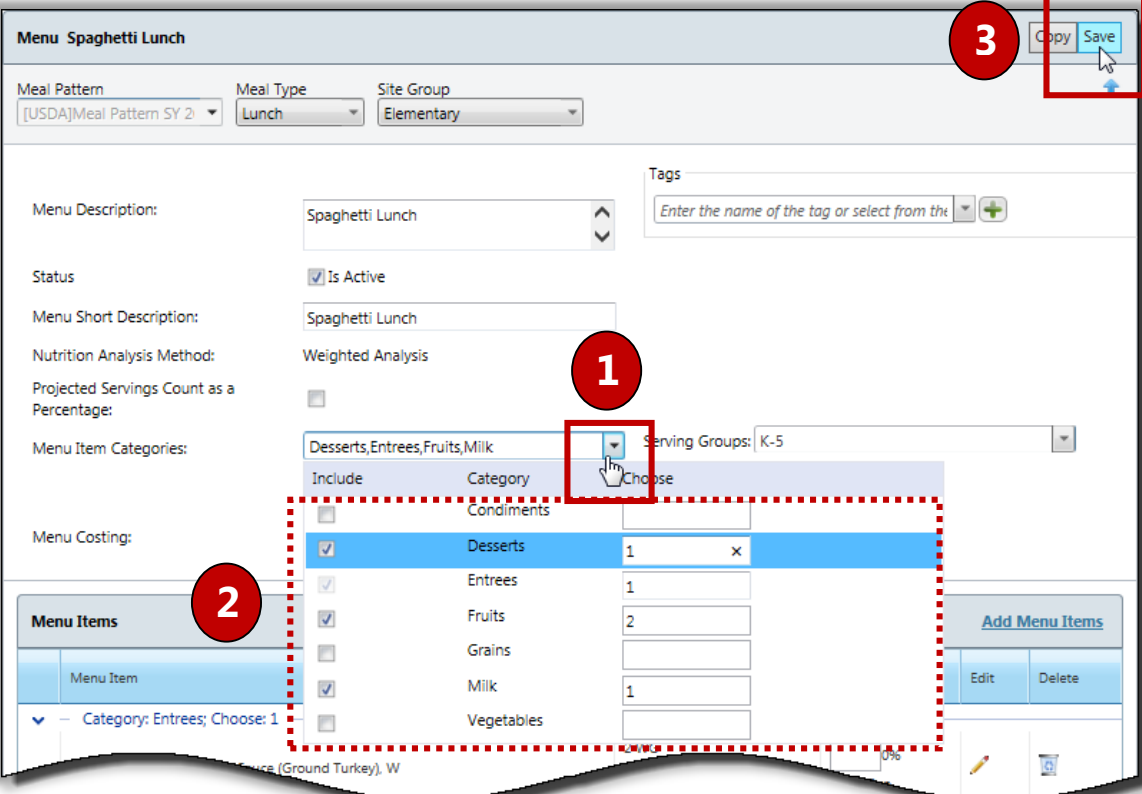


## Changing Menu Item Category Assignments for a Menu

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

### To update menu *Serving Groups*

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



The screenshot shows the 'Menu Spaghetti Lunch' configuration page. The 'Menu Item Categories' section is highlighted with a red dashed box. The table below shows the current category assignments:

Include	Category	Choose
<input type="checkbox"/>	Condiments	
<input checked="" type="checkbox"/>	Desserts	1 x
<input checked="" type="checkbox"/>	Entrees	1
<input checked="" type="checkbox"/>	Fruits	2
<input type="checkbox"/>	Grains	
<input checked="" type="checkbox"/>	Milk	1
<input type="checkbox"/>	Vegetables	

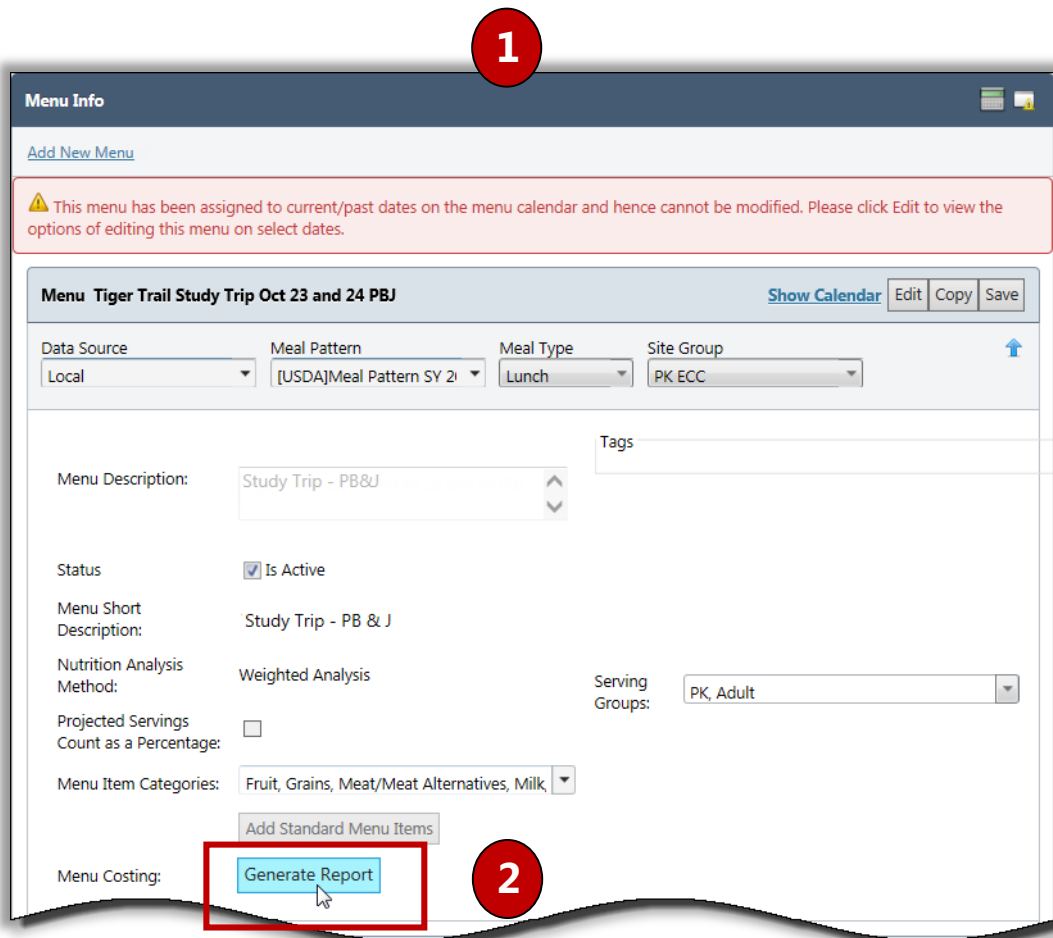
Callout 1 points to the 'Menu Item Categories' button. Callout 2 points to the 'Menu Items' section. Callout 3 points to the 'Save' button.

## Generating a Menu Costing Report

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

### To generate a Menu Costing Report

1. Display a menu on the *Menu Info* page.
2. Click **Generate Report** to the right of the **Menu Costing** label.





http://.../Primero/reportviewer.aspx - Internet Explorer

Generated on: 11/15/2013 12:28:18 PM

### Study Trip PBJ

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

Meal Type: Lunch

Total Meals: 200

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


Page: 1 of 1

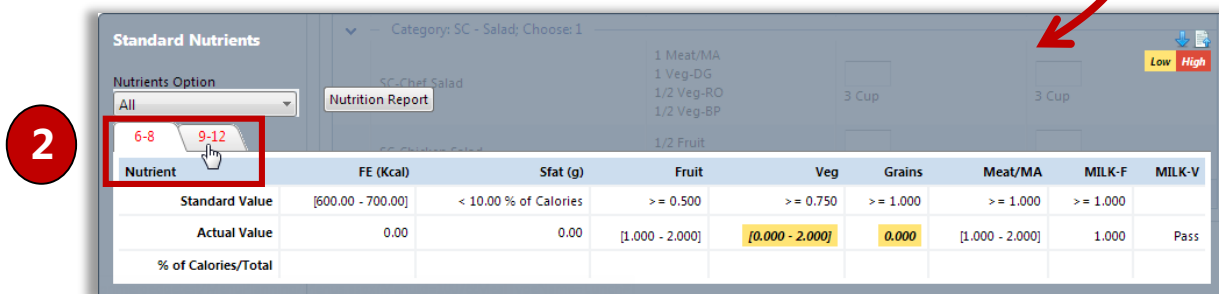
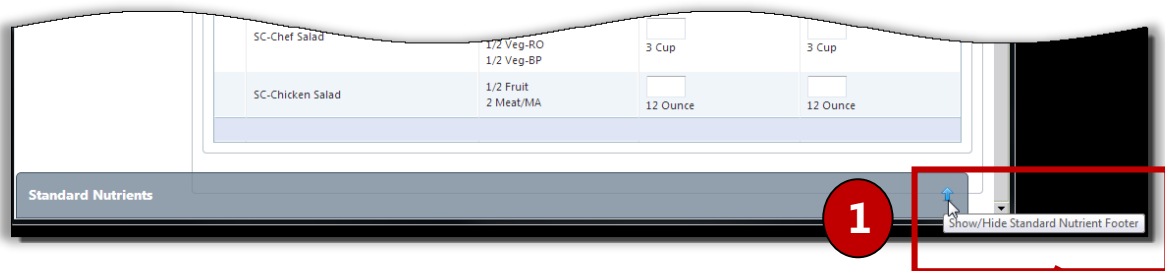
## Viewing Menu Nutrients and Food Components

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


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

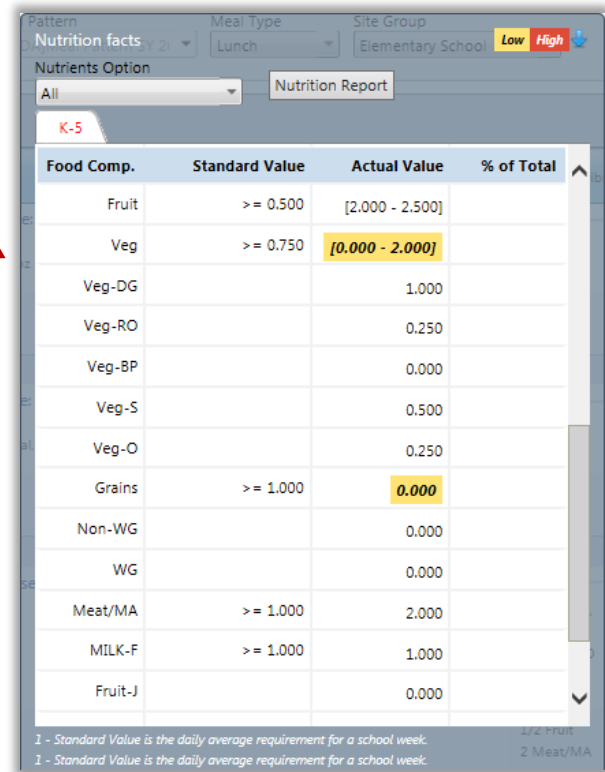
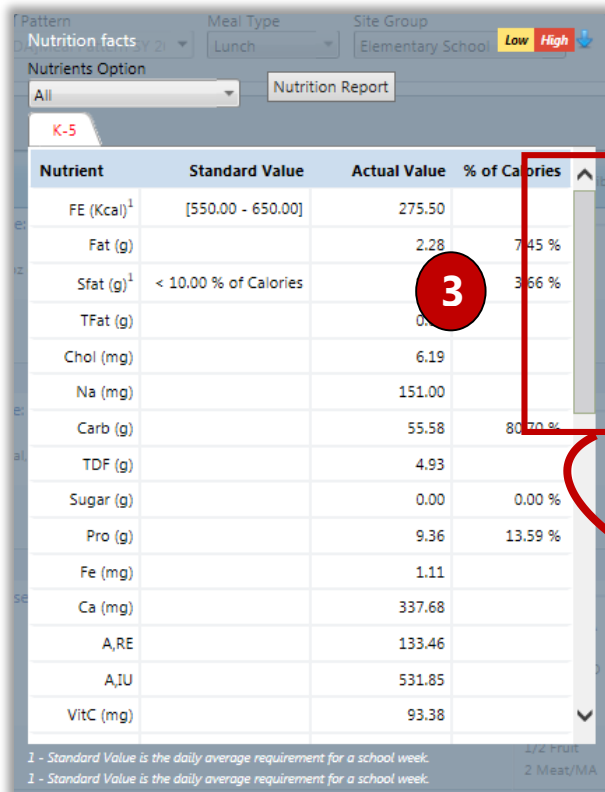
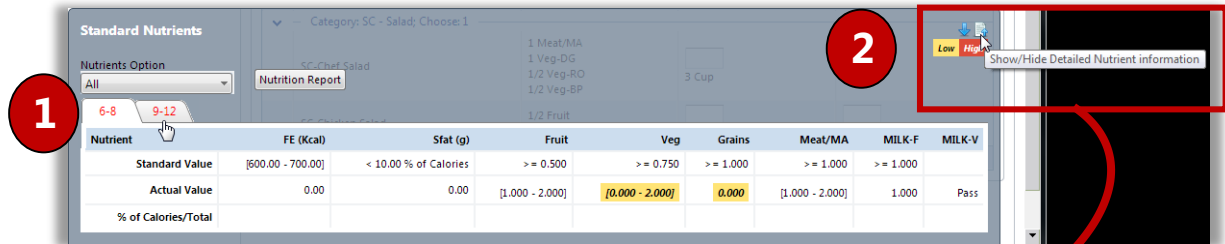
### To view Standard Nutrients for a Serving Group

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



### To view Standard Nutrients details for a Serving Group

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



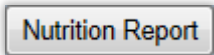
## Generating the Menu Nutrient Analysis Report

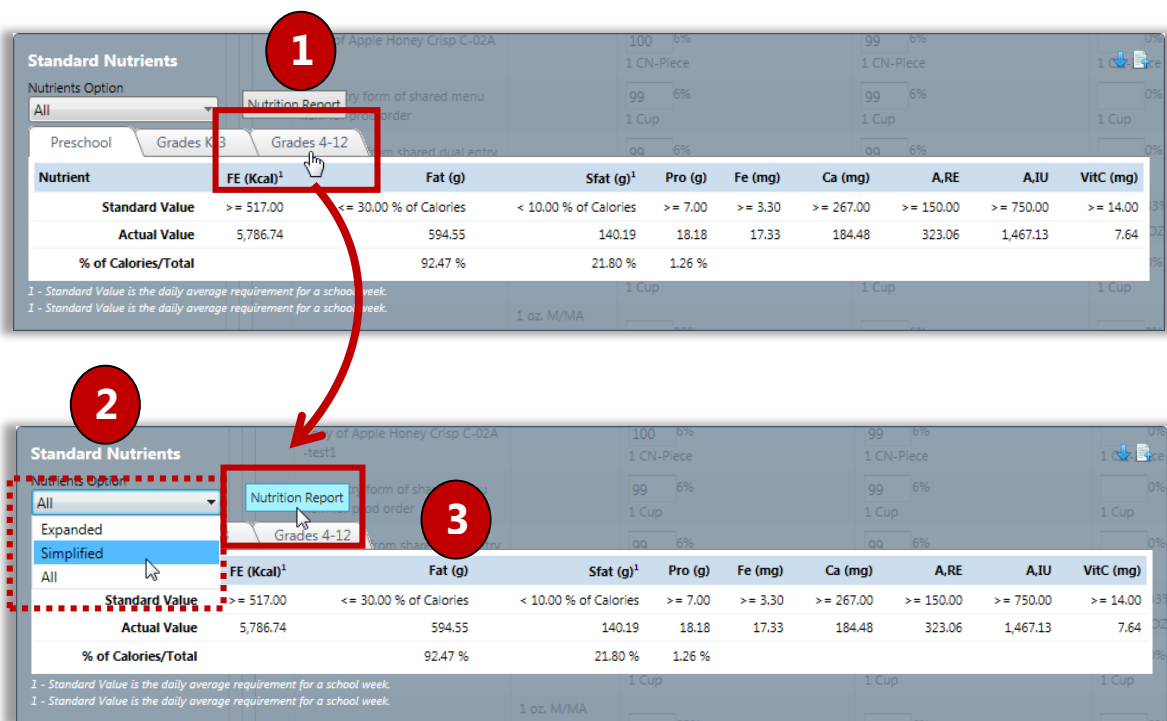
The Menu Nutrient Analysis Report displays either detailed nutrition information for all nutrients or “simplified” information that includes:

- Calories
- Saturated Fat
- Calcium

The default selection is “All” which is set through the [Default Nutrients Option](#) system setting.

### To view Standard Nutrients details for a Serving Group

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



**"All" Nutrients Option**

Menu Nutrient Analysis Report  
STONE CREEK SCHOOLS

Menu Name - SC-Salad Bar  
Site Group - High School  
Serving Group - 9-12  
Meal Type - Lunch

Meal Pattern - [USDA]Meal Pattern SY 2012-2014  
Calculation Method - Weighted Analysis  
Result - **Fail**

Generated on: 7/15/2013 3:30:20 PM

Nutrient Summary				Food Component Summary			
Nutrient	Weekly Standard Value	Actual Value	% of Calories	Food Component	Standard Value	Actual Value	% of Total
FE (Kcal)	[750.00 - 850.00]	0.00		Fruit	>= 1,000	[1,000 - 2,000]	
Fat (g)		0.00		Veg	>= 1,000	[0,000 - 2,000]	
Sfat (g)	< 10.00 % of Calories	0.00		Veg-DG		1.000	
TFat (g)(1)		0.00		Veg-RO		0.500	
Chol (mg)		0.00		Veg-BP		0.500	
Na (mg)		0.00		Veg-S		0.000	
Carb (g)		0.00		Veg-O		0.000	
TDF (g)		0.00		Grains	>= 2,000	0.000	
Pro (g)		0.00		Non-WG		0.000	
Fe (mg)		0.00		WG		0.000	
Ca (mg)		0.00		Meat/MA	>= 2,000	[1,000 - 2,000]	
A,RE		0.00		MILK-F	>= 1,000	1.000	
A,IU		0.00		Fruit-J		1.000	
VitC (mg)		0.00		Grain-D		0.000	
Mois (g)		0.00		Vegetable-J		0.000	
Ash (g)		0.00		MILK-V		Pass	

**Legend**  
(M) - Missing Nutrient Values

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

Item Name (Serving Size)	Plan Qty	FE (Kcal)	Fat (g)	Sfat (g)	TFat (g)	Chol (mg)	Na (mg)	Carb (g)	TDF (g)	Sugar (g)	Pro (g)	Fe (mg)	Ca (mg)	A,RE	A,IU	VitC (mg)	Mois (g)	Ash (g)	
SC-Salad Bar	300																		
Category: SC - Fruit; Choose: 1																			
SC-Banana - LR300024 (1 CN-CUP, ma)		0 200.25	0.74	0.25	-M-	-M-	2.25	51.39	5.85	-M-	2.45	0.59	11.25	18.00	144.00	19.57	168.55	1.85	

Page: 1 of 2

**Page 1**


Menu Nutrient Analysis Report  
STONE CREEK SCHOOLS

Generated on: 2/7/2014 12:32:33 PM

Item Name (Serving Size)	Plan Qty	FE (Kcal)	Fat (g)	Sfat (g)	TFat (g)	Chol (mg)	Na (mg)	Carb (g)	TDF (g)	Sugar (g)	Pro (g)	Fe (mg)	Ca (mg)	A,RE	A,IU	VitC (mg)	Mois (g)	Ash (g)	
CN-	0	1.61	0.01	0.00	-M-	0.00	0.05	0.41	0.02	-M-	0.02	0.01	0.34	0.24	2.40	0.10	1.95	0.01	
Milk; Choose: 1																			
SC-Low Fat Milk, Unflavored - LR300021 (8 oz.)		0 120.00	5.00	3.00	0.00	20.00	120.00	11.00	0.00	-M-	9.00	0.00	30.00	100.00	500.00	2.40	-M-	-M-	
SC-Skim Milk, Unflavored - LR300022 (1 c.)		0 80.00	0.00	0.00	0.00	0.50	130.00	12.00	0.00	-M-	8.00	0.00	300.00	80.00	400.00	4.00	-M-	-M-	
Category: SC - Salad; Choose: 1																			
SC-Chef Salad - LR300019 (3 c.)		0 0.62	0.01	0.00	0.00	0.10	0.22	0.06	0.04	-M-	0.06	0.02	0.59	4.44	149.32	0.08	1.61	0.01	
SC-Chicken Salad - LR300020 (12 oz.)		0 4.83	0.14	0.04	0.00	1.51	7.32	0.06	0.02	0.00	0.51	0.02	0.33	0.33	1.67	0.00	0.49	0.01	

Page: 2 of 2

**Page 2**

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

Section 3: Menus

http://.../reportviewer.aspx - Windows Internet Explorer

Generated on: 7/15/2013 3:05:54 PM

### Menu Nutrient Analysis Report

STONE CREEK SCHOOLS

Menu Name - SC-Salad Bar  
 Site Group - High School  
 Serving Group - 6-8  
 Meal Type - Lunch

Meal Pattern - [USDA]Meal Pattern SY 2012-2014  
 Calculation Method - Weighted Analysis  
 Result - **Fail**

Simplified Nutrients Option

Nutrient Summary				Food Component Summary			
Nutrient	Weekly Standard Value	Actual Value	% of Calories	Food Component	Standard Value	Actual Value	% of Total
FE (Kcal)	[600.00 - 700.00]	0.00		Fruit	>= 0.500	[1.000 - 2.000]	
Sfat (g)	< 10.00 % of Calories	0.00		Veg	>= 0.750	[0.000 - 2.000]	
Na (mg)		0.00		Veg-DG		1.000	
				Veg-RO		0.500	
				Veg-BP		0.500	
				Veg-S		0.000	
				Veg-O		0.000	
				Grains	>= 1.000	0.000	
				Non-WG		0.000	
				WG		0.000	
				Meat/MA	>= 1.000	[1.000 - 2.000]	
				MILK-F	>= 1.000	1.000	
				Fruit-J		1.000	
				Grain-D		0.000	
				Vegetable-J		0.000	
				MILK-V		Pass	

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

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

http://.../reportviewer.aspx - Windows Internet Explorer

Generated on: 2/7/2014 12:24:38 PM

### Menu Nutrient Analysis Report

STONE CREEK SCHOOLS

Menu Name - SC-Salad Bar  
 Site Group - High School  
 Serving Group - 9-12  
 Meal Type - Lunch

Meal Pattern - [USDA]Meal Pattern SY 2012-2014  
 Calculation Method - Weighted Analysis  
 Result - **Fail**

Expanded Nutrients Option

Nutrient Summary					Food Component Summary			
Nutrient	Weekly Standard Value	Actual Value	% of Calories		Food Component	Standard Value	Actual Value	% of Total
FE (kcal)(0)	[750.00 - 850.00]	0.00			Fruit	>= 1.000	[1.000 - 2.000]	
Fat (g)		0.00			Veg	>= 1.000	[0.000 - 2.000]	
Sfat (g)(0)	< 10.00 % of Calories	0.00			Veg-DG		1.000	
Na (mg)		0.00			Veg-RO		0.500	
Carb (g)		0.00			Veg-BP		0.500	
Pro (g)		0.00			Veg-S		0.000	
					Veg-O		0.000	
					Grains	>= 2.000	0.000	
					Non-WG		0.000	
					WG		0.000	
					Meat/MA	>= 2.000	[1.000 - 2.000]	
					MILK-F	>= 1.000	1.000	
					Fruit-J		1.000	
					Grain-D		0.000	
					Vegetable-J		0.000	
					MILK-V		Pass	

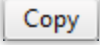

Legend  
 (M) - Missing Nutrient Values  
 (0) Standard Value is the daily average requirement for a school week.

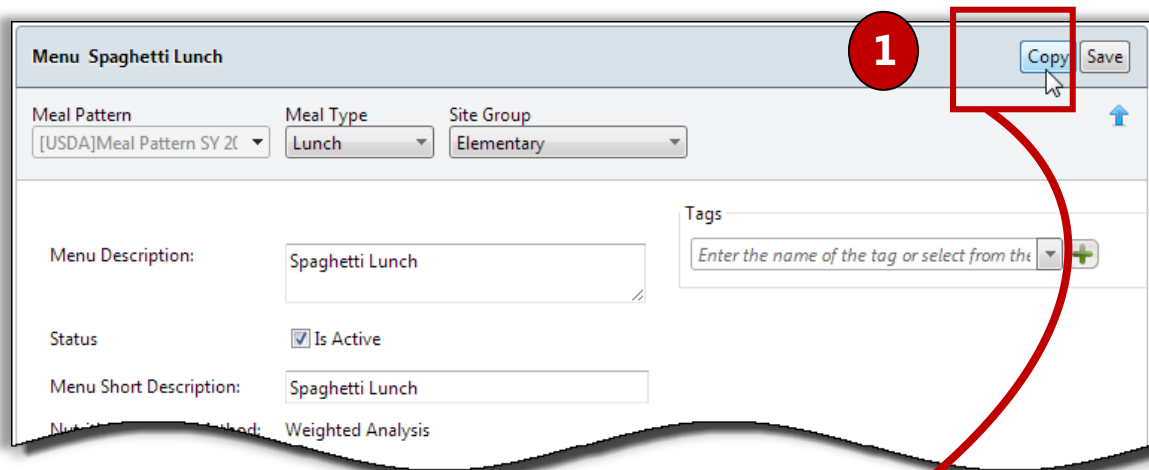
Item Name (Serving Size)	Plan Qty	FE (Kcal)	Fat (g)	Sfat (g)	Na (mg)	Carb (g)	Pro (g)
SC-Salad Bar	300						
Category: SC - Fruit; Choose: 1							
SC-Banana - LR300024 (1 CN-CUP, ma)	0	200.25	0.74	0.25	2.25	51.39	2.45
SC-Grapes - LR300025 (1 CN-grape)	0	1.61	0.01	0.00	0.05	0.41	0.02

Page: 1 of 2

## Copying a Menu

### To copy a Menu

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



**Menu Spaghetti Lunch**

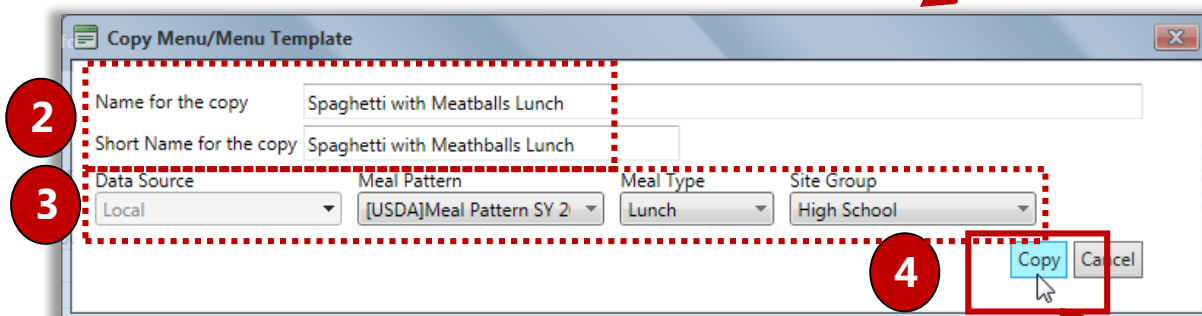
Meal Pattern: [USDA]Meal Pattern SY 20... Meal Type: Lunch Site Group: Elementary

Menu Description: Spaghetti Lunch

Status:  Is Active

Menu Short Description: Spaghetti Lunch

Nutrition Method: Weighted Analysis



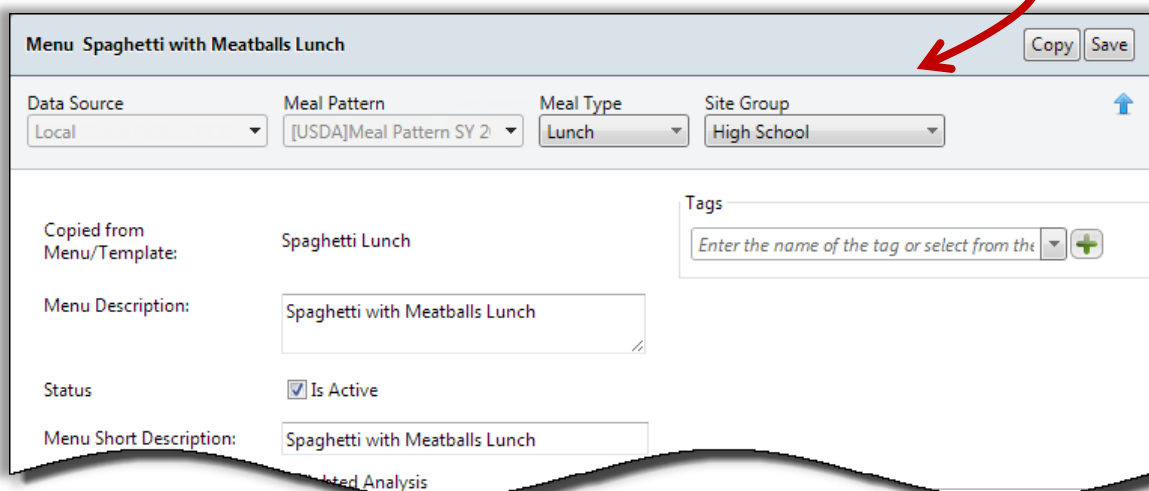
**Copy Menu/Menu Template**

Name for the copy: Spaghetti with Meatballs Lunch

Short Name for the copy: Spaghetti with Meathballs Lunch

Data Source: Local Meal Pattern: [USDA]Meal Pattern SY 20... Meal Type: Lunch Site Group: High School

**Copy** **Cancel**



**Menu Spaghetti with Meatballs Lunch**

Data Source: Local Meal Pattern: [USDA]Meal Pattern SY 20... Meal Type: Lunch Site Group: High School

Copied from Menu/Template: Spaghetti Lunch

Menu Description: Spaghetti with Meatballs Lunch

Status:  Is Active


Menu Short Description: Spaghetti with Meatballs Lunch

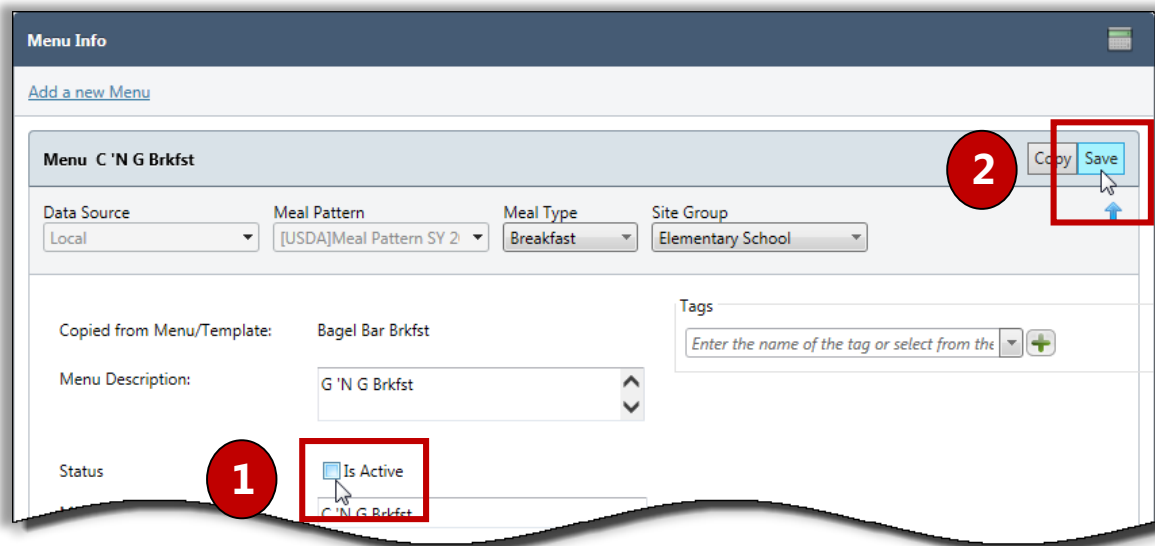
Nutrition Method: Weighted Analysis

## Discontinuing a Menu

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

### **To discontinue a Menu**


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



### **TIP**

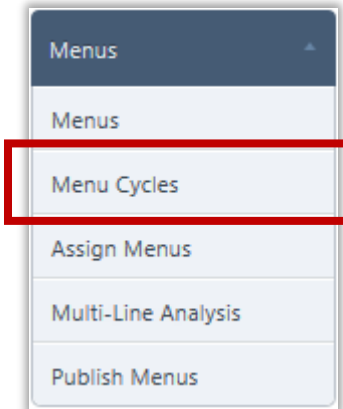
To include discontinued menus in lists, select **Include discontinued menus** in the search conditions.

### **To reactivate a Menu**

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



## Menu Cycles



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

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

### Menu Cycle Particulars

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

### Menu Cycles Page

 A screenshot of the 'Menu Cycles' page. At the top, there is a header 'Menu Cycles' and a link 'Add New Menu Cycle'. Below this is a form with four dropdown menus: 'Data Source' (set to '-- ALL --'), 'Meal Pattern' (set to '-- ALL --'), 'Meal Type' (set to '-- ALL --'), and 'Site Group' (set to '-- ALL --'). There is a 'Name' input field, a checkbox for 'Include Discontinued Menu cycles' (which is unchecked), and 'Apply' and 'Reset' buttons. Below the form is a table titled 'Menu Cycle List' with the following data:
 

Name	Site Group	Meal Type	Number of Weeks	Number of Days	Meal Pattern	Data Source
<a href="#">Regular Line</a>	Elementary School	Lunch	1	5	[USDA]Meal Pattern SY 2012-2014	Local
<a href="#">Salad Line</a>	Elementary School	Lunch	2	5	[USDA]Meal Pattern SY 2012-2014	Local
<a href="#">Sandwich Line</a>	Elementary School	Lunch	1	5	[USDA]Meal Pattern SY 2012-2014	Local

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

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

## Searching for a Menu Cycle

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

### To search for a Menu Cycle

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

The top screenshot shows the search interface with the following search criteria:

- Data Source: -- ALL --
- Meal Pattern: [USDA]Meal Pattern SY 2
- Meal Type: Breakfast
- Site Group: Elementary School
- Name: Bagel
- Include Discontinued Menu cycles

The bottom screenshot shows the search results table:

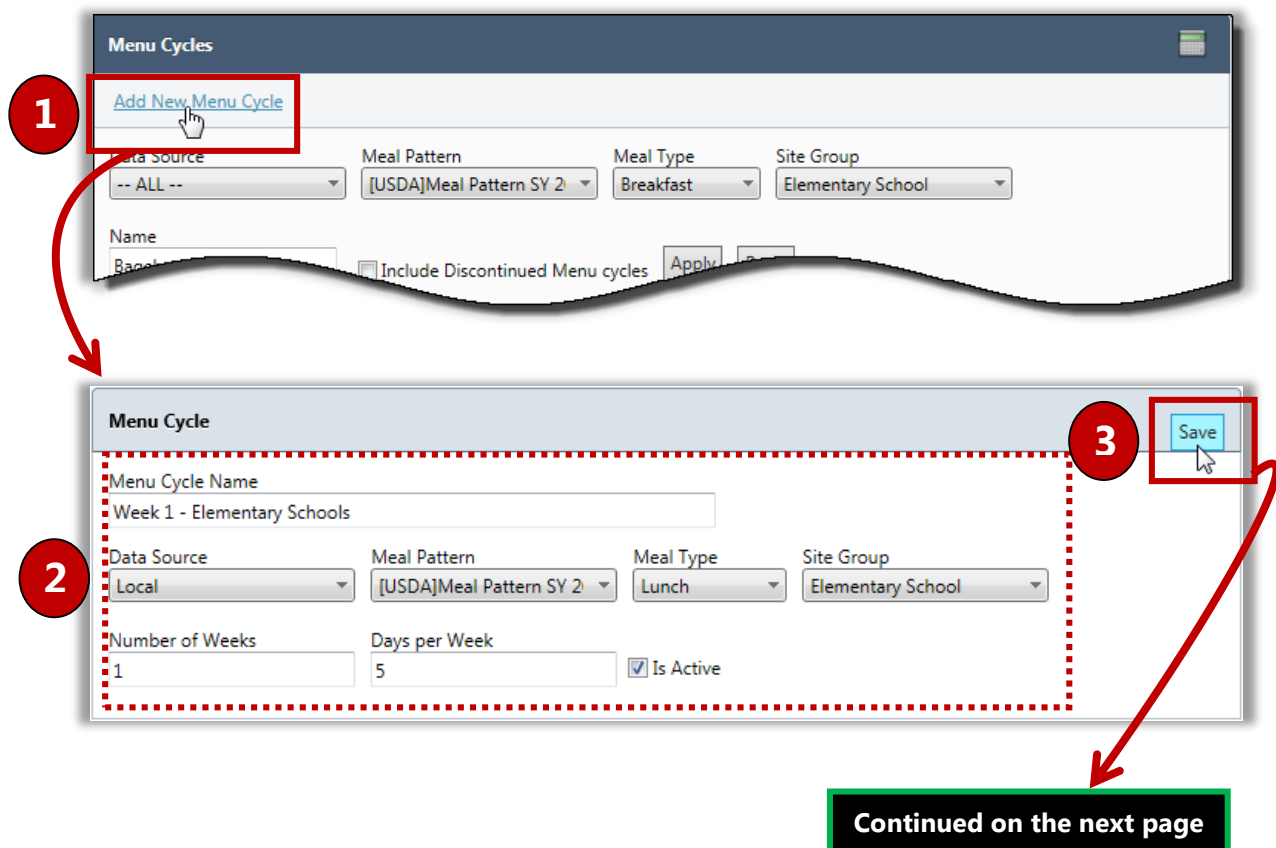
Name	Site Group	Meal Type	Number of Weeks	Number of Days	Meal Pattern	Data Source
<a href="#">Bagel Breakfast</a>	Elementary School	Breakfast	1	5	[USDA]Meal Pattern SY 2012-2014	Local

## Adding a Menu Cycle

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

### To add a Menu Cycle

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



**Menu Cycle Details**

Day	Name	Assign
Week: 1		
1		Assign Menu
2		Assign Menu
3		Assign Menu
4		Assign Menu

**Menu List**

Name	Site Group	Meal Type	Meal Pattern	Data Source	On Calendar	
Bar-B-Que Lunch	Elementary School	Lunch	[USDA]Meal Pattern SY 2012-2014	Local	True	Discontinue
Fiesta Lunch	Elementary School	Lunch	[USDA]Meal Pattern SY 2012-2014	Local	True	Discontinue
Green Fiesta Lunch	Elementary School	Lunch	[USDA]Meal Pattern SY 2012-2014	Local	True	Discontinue
Salad Lunch	Elementary School	Lunch	[USDA]Meal Pattern SY 2012-2014	Local	True	Discontinue
Sandwich Lunch	Elementary School	Lunch	[USDA]Meal Pattern SY 2012-2014	Local	True	Discontinue

**Menu Cycle**

Menu Cycle Name: Week 1 - Elementary Schools

Data Source: Local | Meal Pattern: [USDA]Meal Pattern SY 2 | Meal Type: Lunch | Site Group: Elementary School

Number of Weeks: 1 | Days per Week: 5 |  To Active

**Menu Cycle Details**

Day	Name	Assign
Week: 1		
1	Fiesta Lunch	Assign Menu
2	Bar-B-Que Lunch	Assign Menu
3	Salad Lunch	Assign Menu
4	Sandwich Lunch	Assign Menu
5	Green Lunch	Assign Menu

## Replacing a Menu in a Menu Cycle

### To replace a Menu in a Menu Cycle

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

**Menu Cycle Details**

Day	Name	Assign
Week: 1		
1	Fiesta Lunch	Assign Menu
2	Bar-B-Que Lunch	Assign Menu

**Menu List**

Name	Site Group	Meal Type	Meal Pattern	Data Source	On Calendar	
Bar-B-Que Lunch	Elementary School	Lunch	[USDA]Meal Pattern SY 2012-2014	Local	True	Discontinue
Fiesta Lunch	Bar-B-Que Lunch	Lunch	[USDA]Meal Pattern SY 2012-2014	Local	True	Discontinue
Green Lunch II	Elementary School	Lunch	[USDA]Meal Pattern SY 2012-2014	Local	True	Discontinue

**Menu Cycle**

Menu Cycle Name: Week 1 - Elementary Schools

Data Source: Local | Meal Pattern: [USDA]Meal Pattern SY 2 | Meal Type: Lunch | Site Group: Elementary School

Number of Weeks: 1 | Days per Week: 5 |  Is Active


**Menu Cycle Details**

Day	Name	Assign
Week: 1		
1	Bar-B-Que Lunch	Assign Menu

## Meat/Meat Alternate Grain Substitution

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

### To substitute a Grain contribution for a Meat/MA contribution

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

**Menu Items**

Menu Item	Meal Contribution	K-5 (100)
Category: SC - Brkfst Meals; Choose: 1		
Beef, sandwich steaks, flaked, chopped, formed and thinly sliced, raw	1/2 WG 1 Meat/MA	0% 1 Cup
Banana Bread Squares (Using Master Mix) B-05A	1/4 Non-WG 1/2 Grains	0% 1 Cup
Total:		
Category: SC - Milk; Choose: 1		
SC-Low Fat Milk, Unflavored	1 MILK-F	75% 75% 8 ounce
SC-Skim Milk, Unflavored	1 MILK-F	25% 25% 1 Cup
Total:		
		100% 100%

**Menu Info**

Add a new Menu

Menu Hot Brkfst

Data Source: Local | Meal Pattern: [USDA]Meal Pattern SY 2 | Meal Type: Breakfast | Site Group: Elementary School


Copy Save

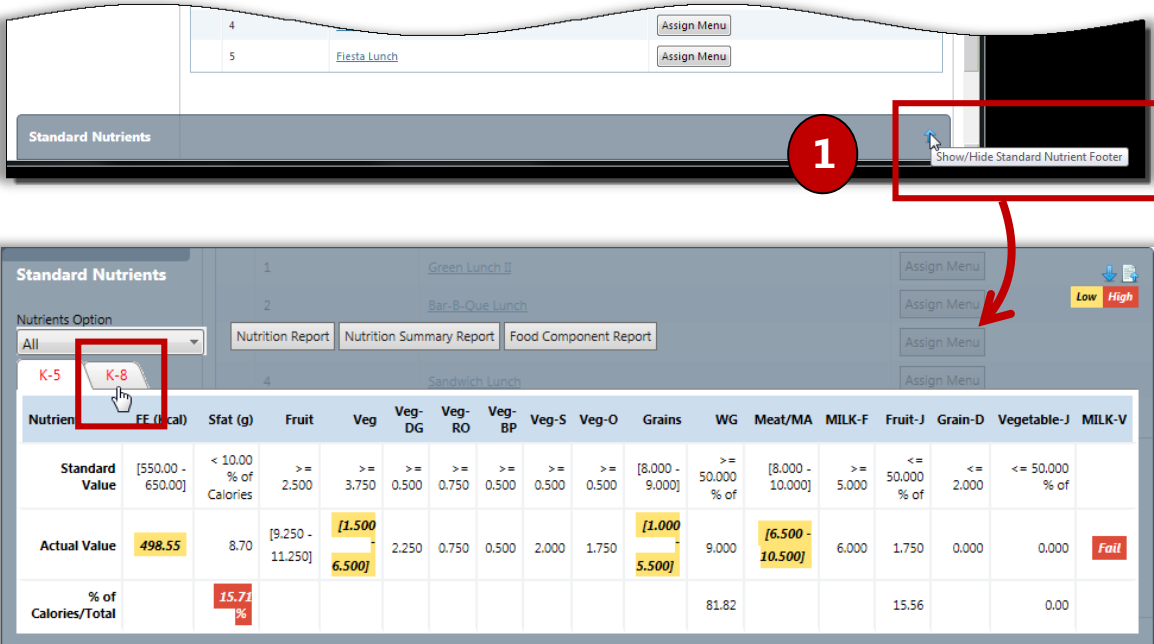
## Viewing Menu Cycle Nutrients and Food Components

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

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

### To view Standard Nutrients for a Serving Group


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

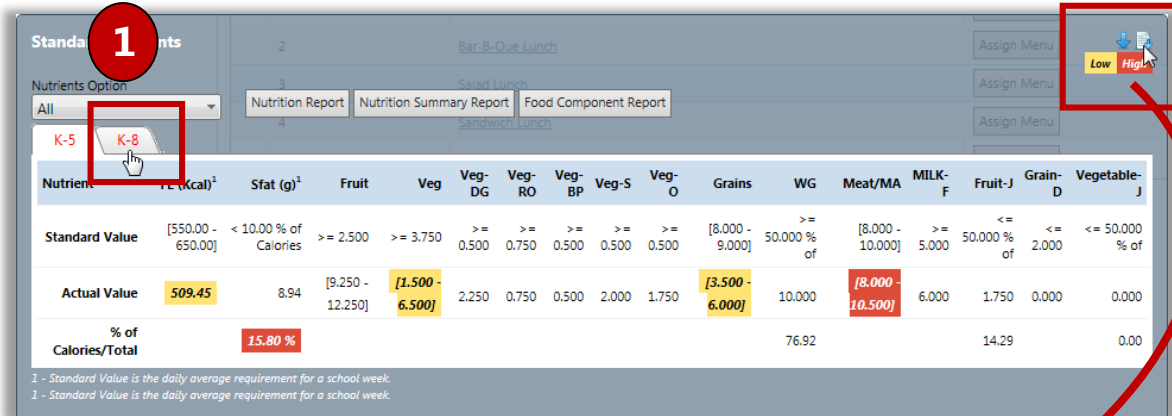


The image shows two screenshots from a software interface. The top screenshot shows a menu cycle display with a 'Standard Nutrients' footer. A red box highlights the 'Show/Hide Standard Nutrient Footer' button, which has an up arrow icon. A red circle with the number '1' is next to it. The bottom screenshot shows the 'Standard Nutrients' report for a serving group. A red box highlights the 'K-8' serving group tab, with a red circle and the number '2' next to it. The report table below shows nutrient values and requirements.

Nutrient	FF (kcal)	Sfat (g)	Fruit	Veg	Veg-DG	Veg-RO	Veg-BP	Veg-S	Veg-O	Grains	WG	Meat/MA	MILK-F	Fruit-J	Grain-D	Vegetable-J	MILK-V
<b>Standard Value</b>	[550.00 - 650.00]	< 10.00 % of Calories	>= 2.500	>= 3.750	>= 0.500	>= 0.750	>= 0.500	>= 0.500	>= 0.500	[8.000 - 9.000]	>= 50.000 % of	[8.000 - 10.000]	>= 5.000	<= 50.000 % of	<= 2.000	<= 50.000 % of	
<b>Actual Value</b>	498.55	8.70	[9.250 - 11.250]	[1.500 - 6.500]	2.250	0.750	0.500	2.000	1.750	[1.000 - 5.500]	9.000	[6.500 - 10.500]	6.000	1.750	0.000	0.000	Fail
<b>% of Calories/Total</b>		15.71 %									81.82			15.56		0.00	

### To view Standard Nutrients details for a Serving Group

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

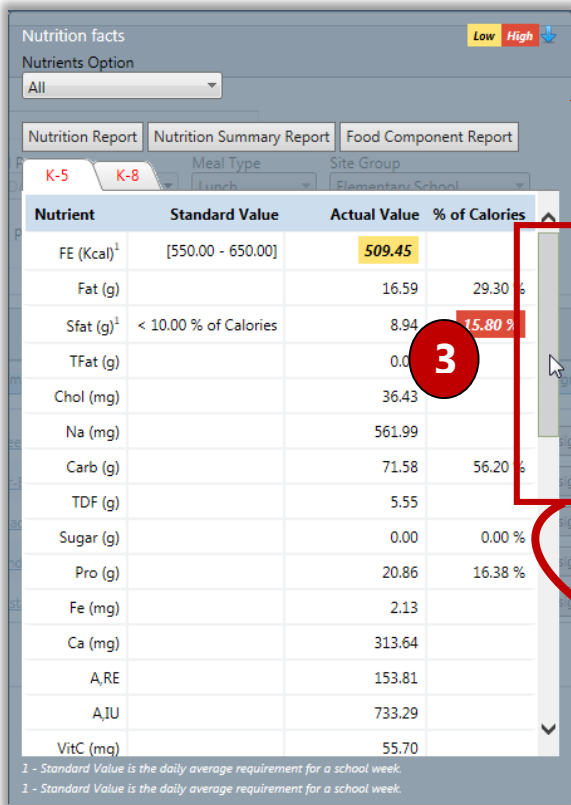


**1**

**2**

Nutrient	FE (Kcal) <sup>1</sup>	Sfat (g) <sup>1</sup>	Fruit	Veg	Veg-DG	Veg-RO	Veg-BP	Veg-S	Veg-O	Grains	WG	Meat/MA	MILK-F	Fruit-J	Grain-D	Vegetable-J
<b>Standard Value</b>	[550.00 - 650.00]	< 10.00 % of Calories	>= 2,500	>= 3,750	>= 0,500	>= 0,750	>= 0,500	>= 0,500	>= 0,500	[8,000 - 9,000]	>= 50,000 % of	[8,000 - 10,000]	>= 5,000	<= 50,000 % of	<= 2,000	<= 50,000 % of
<b>Actual Value</b>	509.45	8.94	[9,250 - 12,250]	[1,500 - 6,500]	2,250	0,750	0,500	2,000	1,750	[3,500 - 6,000]	10,000	[8,000 - 10,500]	6,000	1,750	0,000	0,000
<b>% of Calories/Total</b>		15.80 %									76.92			14.29	0.00	

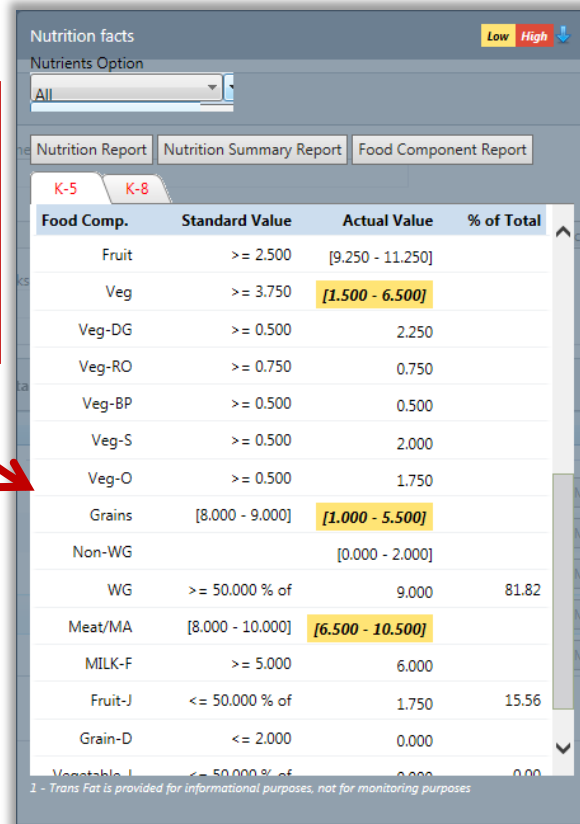
1 - Standard Value is the daily average requirement for a school week.  
1 - Standard Value is the daily average requirement for a school week.



**3**

Nutrient	Standard Value	Actual Value	% of Calories
FE (Kcal) <sup>1</sup>	[550.00 - 650.00]	509.45	
Fat (g)		16.59	29.30 %
Sfat (g) <sup>1</sup>	< 10.00 % of Calories	8.94	15.80 %
TFat (g)		0.00	
Chol (mg)		36.43	
Na (mg)		561.99	
Carb (g)		71.58	56.20 %
TDF (g)		5.55	
Sugar (g)		0.00	0.00 %
Pro (g)		20.86	16.38 %
Fe (mg)		2.13	
Ca (mg)		313.64	
A,RE		153.81	
A,IU		733.29	
VitC (mg)		55.70	

1 - Standard Value is the daily average requirement for a school week.  
1 - Standard Value is the daily average requirement for a school week.



Food Comp.	Standard Value	Actual Value	% of Total
Fruit	>= 2,500	[9,250 - 11,250]	
Veg	>= 3,750	[1,500 - 6,500]	
Veg-DG	>= 0,500	2,250	
Veg-RO	>= 0,750	0,750	
Veg-BP	>= 0,500	0,500	
Veg-S	>= 0,500	2,000	
Veg-O	>= 0,500	1,750	
Grains	[8,000 - 9,000]	[1,000 - 5,500]	
Non-WG		[0,000 - 2,000]	
WG	>= 50,000 % of	9,000	81.82
Meat/MA	[8,000 - 10,000]	[6,500 - 10,500]	
MILK-F	>= 5,000	6,000	
Fruit-J	<= 50,000 % of	1,750	15.56
Grain-D	<= 2,000	0,000	
Vegetable-J	<= 50,000 % of	0,000	0.00

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



## Generating a Menu Cycle Week Nutrient Analysis Report

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

Calories                      Saturated Fat                      Calcium

Highlighted report values include

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

The default **Nutrient Option** selection is “All”; the default value for this selection is set through the [Default Nutrients Option](#) system setting.

### To view Standard Nutrients analysis for a Serving Group

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

4. Click **Nutrition Report**.

**Standard Nutrients**

Nutrients Option: All

Report Type: Nutrition Report

Nutrient	(Kcal) <sup>1</sup>	Sfat (g) <sup>1</sup>	Fruit	Veg	Veg-DG	Veg-RO	Veg-BP	Veg-S	Veg-O	Grains	WG	Meat/MA	MILK-F	Fruit-J	Grain-D	Vegetable-J
Standard Value	[550.00 - 650.00]	< 10.00 % of Calories	>= 2,500	>= 3,750	>= 0.500	>= 0.750	>= 0.500	>= 0.500	>= 0.500	[8.000 - 9.000]	>= 50.000 % of	[8.000 - 10.000]	>= 5.000	<= 50.000 % of	<= 2,000	<= 50.000 % of
Actual Value	509.45	8.94	[9.250 - 12.250]	[1.500 - 6.500]	2.250	0.750	0.500	2.000	1.750	[3.500 - 6.000]	10.000	[8.000 - 10.500]	6.000	1.750	0.000	0.000
% of Calories/Total		15.80 %								76.92				14.29		0.00

1 - Standard Value is the daily average requirement for a school week.  
1 - Standard Value is the daily average requirement for a school week.

---

**Standard Nutrients**

Nutrients Option: All

Report Type: Nutrition Report

Nutrient	(Kcal) <sup>1</sup>	Sfat (g) <sup>1</sup>	Fruit	Veg	Veg-DG	Veg-RO	Veg-BP	Veg-S	Veg-O	Grains	WG	Meat/MA	MILK-F	Fruit-J	Grain-D	Vegetable-J
Standard Value	[600.00 - 650.00]	< 10.00 % of Calories	>= 2,500	>= 3,750	>= 0.500	>= 0.750	>= 0.500	>= 0.500	>= 0.500	[8.000 - 9.000]	>= 50.000 % of	[9.000 - 10.000]	>= 5.000	<= 50.000 % of	<= 2,000	<= 50.000 % of
Actual Value	0.00	0.00	[2.000 - 2.500]	[0.000 - 2.000]	1.000	0.500	0.500	0.000	0.000	0.000	0.000	[1.000 - 2.000]	1.000	0.000	0.000	0.000
% of Calories/Total														0.00		0.00

1 - Standard Value is the daily average requirement for a school week.  
1 - Standard Value is the daily average requirement for a school week.

Section 3: Menus

**"All" Nutrients Option**

**"Simplified" Nutrients Option**

**Menu Cycle Week Nutrient Analysis Report**  
 Menu Cycle Name - Week 1 - Elementary Schools  
 Site Group - Elementary School Meal Pattern - [USDA]Meal Pattern SY 2012-2014  
 Serving Group - K-8 Calculation Method - Weighted Analysis  
 Meal Type - Lunch Result - Fail  
 Week - 1

Cycle Week Nutrient Summary				Cycle Week Food Component Summary			
Nutrient	Weekly Standard Value	Actual Value	% of Calories	Food Component	Standard Value	Actual Value	% of Total
FE (Kcal)	[600.00 - 650.00]	0.00		Fruit	>= 2.500	[2.000 - 2.500]	
Fat (g)		0.00		Veg	>= 3.750	[0.000 - 2.000]	
Sfat (g)	< 10.00 % of Calories	0.00		Veg-DG	>= 0.500	1.000	
TFat (g)(1)		0.00		Veg-RO	>= 0.750	0.500	
Chol (mg)		0.00		Veg-BP	>= 0.500	0.500	
Na (mg)		0.00		Veg-S	>= 0.500	0.000	
Carb (g)		0.00		Veg-O	>= 0.500	0.000(a)	
TDF (g)		0.00		Grains	[8.000 - 9.000]	0.000	
Pro (g)		0.00		Non-WG		0.000	
Fe (mg)		0.00		WG	>= 50.000 % of	0.000	
Ca (mg)							
A,RE							
A,IU							
VitC (mg)							
Mois (g)							
Ash (g)							

**Legend**  
 (M) - Missing Nutrient Values  
 (1) Trans Fat is provided for informational purposes, not for  
 (a) Requirement is being met with additional amounts from

Item Name (Serving Size)	Plan Qty	FE (Kcal)	Fat (g)	Sf
Green Lunch II - Day: 1	100			
Category: SC - Fruit; Choose: 2				

**Menu Cycle Week Nutrient Analysis Report**  
 Menu Cycle Name - Week 1 - Elementary Schools  
 Site Group - Elementary School Meal Pattern - [USDA]Meal Pattern SY 2012-2014  
 Serving Group - K-8 Calculation Method - Weighted Analysis  
 Meal Type - Lunch Result - Fail  
 Week - 1


Cycle Week Nutrient Summary				Cycle Week Food Component Summary			
Nutrient	Weekly Standard Value	Actual Value	% of Calories	Food Component	Standard Value	Actual Value	% of Total
FE (Kcal)	[600.00 - 650.00]	0.00		Fruit	>= 2.500	[2.000 - 2.500]	
Sfat (g)	< 10.00 % of Calories	0.00		Veg	>= 3.750	[0.000 - 2.000]	
Na (mg)		0.00		Veg-DG	>= 0.500	1.000	
				Veg-RO	>= 0.750	0.500	
				Veg-BP	>= 0.500	0.500	
				Veg-S	>= 0.500	0.000	
				Veg-O	>= 0.500	0.000(a)	
				Grains	[8.000 - 9.000]	0.000	
				Non-WG		0.000	
				WG	>= 50.000 % of	0.000	
				Meat/MA	[9.000 - 10.000]	[1.000 - 2.000]	
				MILK-F	>= 5.000	1.000	
				Fruit-J	<= 50.000 % of	0.000	0.00
				Grain-D	<= 2.000	0.000	
				Vegetable-J	<= 50.000 % of	0.000	0.00
				MILK-V		Fail	

**Legend**  
 (M) - Missing Nutrient Values  
 (a) Requirement is being met with additional amounts from the dark green, red/orange, and beans/peas vegetable subgroups.

Item Name (Serving Size)	Plan Qty	FE (Kcal)	Sfat (g)	Na (mg)
Green Lunch II - Day: 1	100			
Category: SC - Fruit; Choose: 2				

Page: 1 of 2

**TIP**

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

## Generating a Menu Cycle Week Nutrient Summary Report

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

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

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

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

The screenshot shows the 'Standard Nutrients' interface with a 'Nutrition Summary Report' button highlighted. Below it is a detailed report for 'Fresh Fruit & Salads' showing daily and weekly nutrient values. Red arrows point to the 'Actual Value' for FE (Kcal) and the '% of Calories' for Sfat (g).

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

## Generating a Weekly Food Component Report

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

Highlighted report values include

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

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

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

### To view the Weekly Food Component Report for a Serving Group

1. Display the Standard Nutrients footer for a menu and select a Serving Group, if needed.

2. Click **Food Component Report**.

Standard Value	FE (Kcal)	Sfat (g)	Fruit	Veg	Veg-DG	Veg-RO	Veg-BP	Veg-S	Veg-O	Grains	WG	Meat/MA	MILK-F	Fruit-J	Grain-D	Vegetable-J	MILK-V
[550.00 - 650.00]	< 10.00 % of Calories	>= 2.500	>= 3.750	>= 0.500	>= 0.750	>= 0.500	>= 0.500	>= 0.500	[8.000 - 9.000]	>= 50.000 % of	[8.000 - 10.000]	>= 5.000	<= 50.000 % of	<= 2.000	<= 50.000 % of		
Actual Value	498.55	8.70	[9.250 - 11.250]	[1.500 - 6.500]	2.250	0.750	0.500	2.000	1.750	[1.000 - 5.500]	9.000	[6.500 - 10.500]	6.000	1.750	0.000	0.000	Fail
% of Calories/Total	15.71 %										81.82			15.56		0.00	

**Continued on the next page**

http:// reportviewer.aspx - Windows Internet Explorer

Generated on: 08/26/2013 02:06:21 PM

### Weekly Food Component Report

Menu Cycle Name - Breakfast Grill  
 Site Group - Elementary School Meal Pattern - [USDA]Meal Pattern SY 2012-2014  
 Serving Group - K-5 Meal Type - Breakfast  
 Week - 1

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

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

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

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

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

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

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

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


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

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

Page: 1 of 1

**Substitutions**

**TIP**

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

## Copying a Menu Cycle

### To copy a Menu Cycle

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

**Menu Cycle**

Menu Cycle Name  
Breakfast Grill

Data Source: Local | Meal Pattern: [USDA]Meal Pattern SY 2 | Meal Type: Breakfast | Site Group: Elementary School

Number of Weeks: 2 | Days per Week: 3 |  Is Active

**Menu Cycle Details**

Day	Name	Assign
Week 1		
1	Hot Breakfast	Assign Menu
2	Hot Breakfast	Assign Menu
3	Hot Breakfast	Assign Menu

**Copy Menu Cycle**

Name for the copy: Southwest Grill

Data Source: Local | Meal Pattern: [USDA]Meal Pattern SY 2 | Meal Type: Breakfast | Site Group: Elementary School


Number of Weeks: 2 | Days per Week: 3

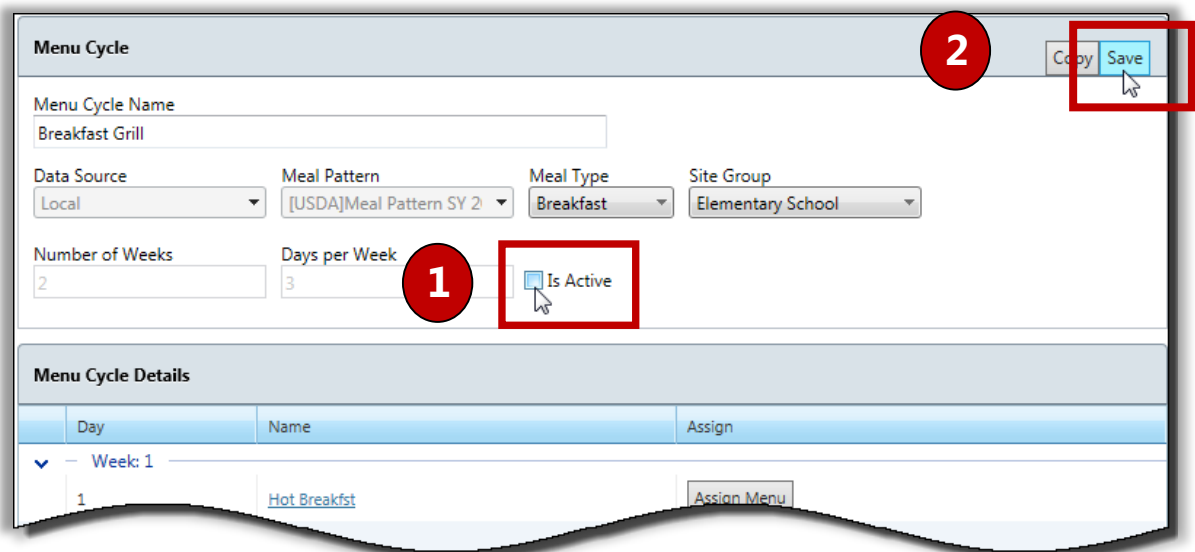
**4** Copy Cancel

## Discontinuing a Menu Cycle

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

### To discontinue a Menu Cycle

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



**Menu Cycle**

Menu Cycle Name  
Breakfast Grill

Data Source: Local | Meal Pattern: [USDA]Meal Pattern SY 2 | Meal Type: Breakfast | Site Group: Elementary School

Number of Weeks: 2 | Days per Week: 3

Is Active


**Menu Cycle Details**

Day	Name	Assign
Week: 1		
1	Hot Breakfast	Assign Menu

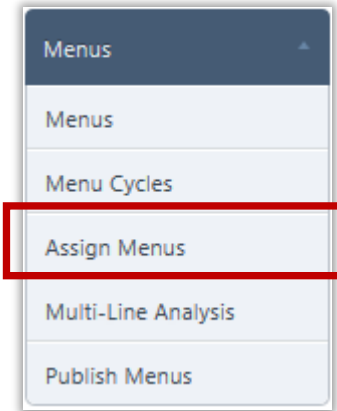
### TIP

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

### To reactivate a Menu Cycle

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


## Assign Menu



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

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

### *Assign Menus Page*

A screenshot of the 'Assign Menus' page. The page has a dark blue header with the title 'Assign Menus'. Below the header, there are four input fields: 'Meal Type' with a dropdown menu showing '-- SELECT --', 'Site Group' with a dropdown menu showing '-- SELECT --', 'Site' with a text input field, and 'Menu Line' with a text input field.

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

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



## Assigning a Menu Cycle

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

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

### To assign a Menu Cycle to a Menu Calendar

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

The screenshot shows the 'Assign Menu' window. A red box labeled '1' highlights the selection area for Meal Type (Lunch), Site Group (Elementary School), Site (-- ALL --), and Menu Line (Regular). A red arrow points from this box to the 'Regular' menu line in the dropdown. Below, a calendar for September 2013 is shown. A red box labeled '2' highlights the date '2 Sep' (Monday, September 02, 2013). Another red arrow points from the 'Next' button in the top right of the calendar area to the 'Next' button in the top right of the window.

Continued on the next page

Section 3: Menus

**Menu Cycles**

Select	Name	Name	Site Group	Meal Type	Number of Weeks	Meal Pattern
>	January Elementary Lunch	January Elementary Lunch	Elementary School	Lunch	1	[USDA] Traditional Meal Pattern
>	Test Menu Cycle default1	Test Menu Cycle default1	Elementary School	Lunch	1	[USDA]Meal Pattern SY 2012-2014
> <input checked="" type="checkbox"/>	Week 1 - Elementary Schools	Week 1 - Elementary Schools	Elementary School	Lunch	1	[USDA]Meal Pattern SY 2012-2014

3 Back Next

Menu Calendar | Select Menu/Menu Cycle | Review & Confirm

Back Assign

Selected Date:  
Menu Cycle: Week 1 - Elementary Schools Start Cycle on 9/2/2013

Skip Holidays  Skip Weekends  Use All Menus  Override Assigned Menus Apply

Serving Date	Day	Menu	Existing Menu
> 9/2/2013	Monday	Bar-B-Que Lunch	Green Lunch II
> 9/3/2013	Tuesday	Bar-B-Que Lunch	Bar-B-Que Lunch
> 9/4/2013	Wednesday	Salad Lunch	Salad Lunch

Site Name	Site Group	Effective Date	End Date
ELEMENTARY SCHOOL	Elementary School	10/5/2011	
ELEMENTARY SCHOOL	Elementary School	4/11/2012	
ELEMENTARY SCHOOL	Elementary School	3/6/2013	

4 Assign

Menu cycle assigned successfully.

**Assign Menus**

Meal Type: Lunch | Site Group: Elementary School | Site: -- ALL -- | Menu Line: Regular

Menu Calendar | Select Menu/Menu Cycle | Review & Confirm

Next

September 2013

S	M	T	W	T	F	S
25 Aug	26 Aug	27 Aug	28 Aug	29 Aug	30 Aug	31 Aug
1 Sep	2 Sep Green Lunch II	3 Sep Bar-B-Que Lunch	4 Sep Salad Lunch	5 Sep Sandwich Lunch	6 Sep Fiesta Lunch	7 Sep

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

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

For example

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



2. To this week starting on Tuesday the 3<sup>rd</sup>:

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

3. With these options selected:

Skip Holidays  
  Skip Weekends  
  Use All Menus

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

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

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

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

For example

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



2. To this calendar starting on Tuesday the 3<sup>rd</sup>:

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

3. With these options selected:

Skip Holidays  
  Skip Weekends  
  Use All Menus

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

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

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

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

- **Use All Menus** – when selected
  - \* Any unassigned Menus are assigned to the next available day
  - \* *Option is not selected by default.*

For example

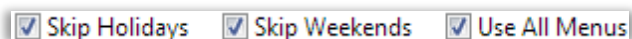
1. If you assign Menu Cycle X which includes five (5) menus:



2. To this calendar starting on Tuesday the 3<sup>rd</sup> :

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

3. With these options selected:



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

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

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

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

For example,

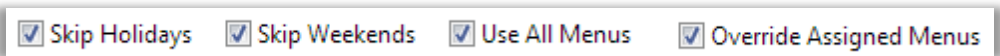
1. If you assign Menu Cycle X which includes five (5) menus:



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

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

3. With these options selected:





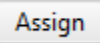
This is how the assigned week appears in the Menu Calendar:

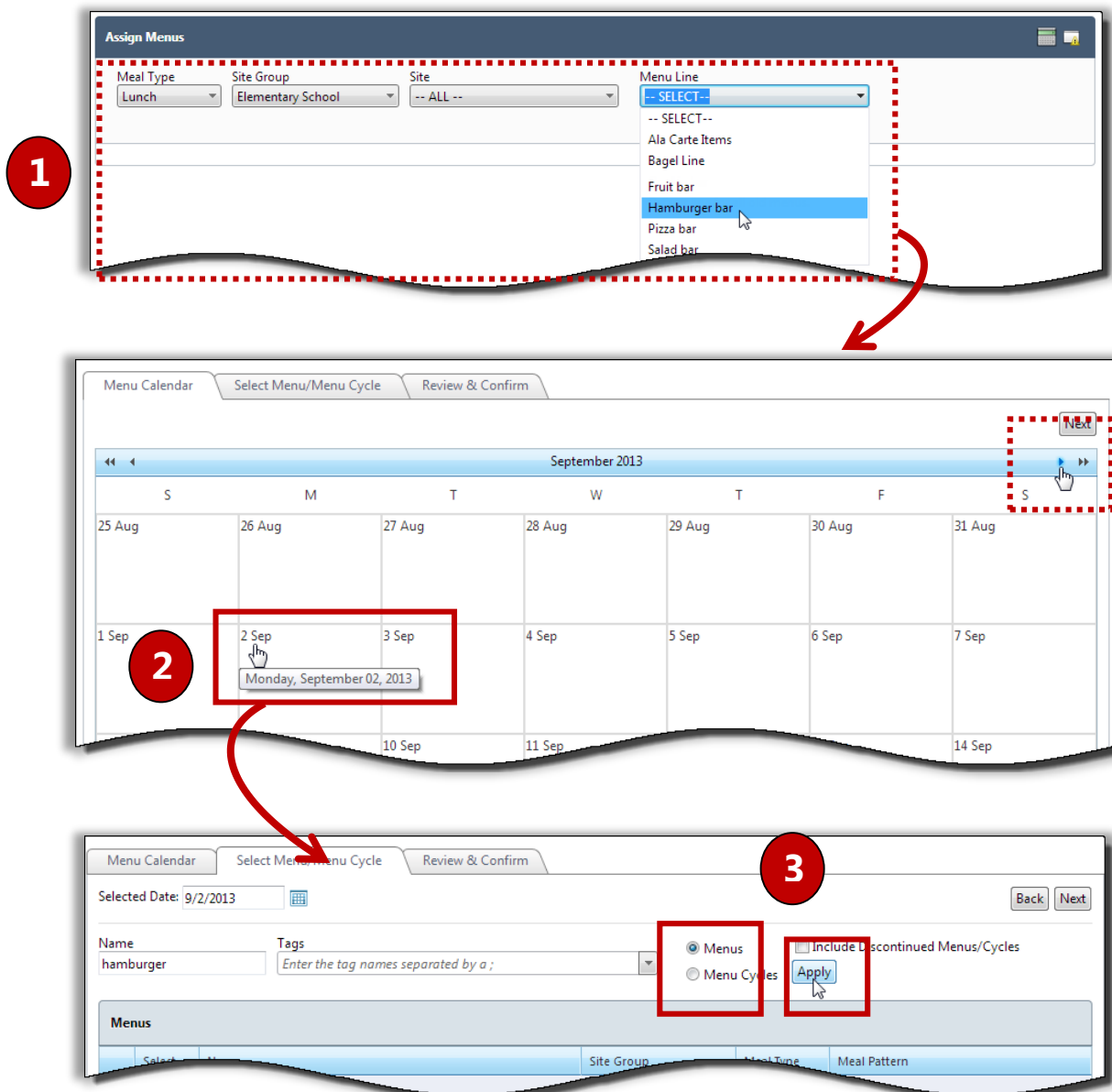
Sun 1	Mon 2	<b>Tues 3</b>	Wed 4	Thurs 5	Fri 6	Sat 7
		<b>Menu A</b>	<b>Menu B</b>	<b>Holiday</b>	<b>Holiday</b>	
Sun 8	Mon 9	Tues 10	Wed 11	Thurs 12	Fri 13	Sat 14
	<b>Menu C</b>	<b>Menu D</b>	<b>Menu E</b>	<b>Menu 4</b>	<b>Menu 5</b>	

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

## Assigning a Menu

### To assign a Menu

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



The first screenshot shows the 'Assign Menu' dialog box. A red circle with the number '1' is next to it. The 'Meal Type' is set to 'Lunch', 'Site Group' to 'Elementary School', and 'Site' to '-- ALL --'. The 'Menu Line' dropdown is open, showing options like 'Hamburger bar', 'Pizza bar', and 'Salad bar'. A red dashed box highlights the dropdown menu, and a red arrow points from it to the second screenshot.

The second screenshot shows the 'Menu Calendar' view for September 2013. A red circle with the number '2' is next to it. The date '2 Sep' is selected, and a tooltip shows 'Monday, September 02, 2013'. A red dashed box highlights the 'Next' button in the top right corner, and a red arrow points from it to the third screenshot.

The third screenshot shows the 'Review & Confirm' step. A red circle with the number '3' is next to it. The 'Selected Date' is '9/2/2013'. The 'Name' field contains 'hamburger'. The 'Tags' field is empty. The 'Include Discontinued Menus/Cycles' checkbox is checked. The 'Apply' button is highlighted with a red dashed box, and a red arrow points from it to the 'Menus' list below.

### Section 3: Menus

Menu Calendar    Select Menu/Menu Cycle    Review & Confirm

Selected Date: 9/2/2013

Name: hamburger    Tags:      Menu     Include Discontinued Menus/Cycles  
 Menu Cycles   

Select	Name	Site Group	Meal Type	Meal Pattern
<input checked="" type="checkbox"/>	Hamburger Meal	Elementary School	Lunch	[USDA]Meal Pattern SY 2012-2014

**4**

Menu Calendar    Select Menu/Menu Cycle    Review & Confirm

Selected Date: 9/2/2013

Menu: Hamburger Meal

Menu Item
Category: Meals; Choose: 1 Hamburger w/ Bun
Category: Salads; Choose: 1 Hamburger
Category: Fruit; Choose: 1 Apple, Golden Delicious Banana
Category: Milk; Choose: 1 Fat-free Milk Low-Fat Milk

Site Name	Site Group	Effective Date	End Date
EMERSON ELEMENTARY SCHOOL	Elementary School	10/20/2012	

**5**



## Replacing an Assigned Menu

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

### To replace an assigned Menu

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

The image consists of three overlapping screenshots from a software application, illustrating the process of replacing an assigned menu. Red circles and arrows indicate the sequence of steps.

**Step 1:** A menu calendar is displayed for the month of September. The date September 3rd is selected, and a tooltip shows the current menu: "Bar-B-Que Lunch" for "Tuesday, September 03, 2013".

**Step 2:** The "Menu Calendar" screen is shown with the "Selected Date" set to 9/3/2013. The "Existing Menu" is "Bar-B-Que Lunch". The "Menu" radio button is selected, and the "Next" button is highlighted.

Select	Name	Site Group	Meal Type	Meal Pattern
<input type="checkbox"/>	Bar-B-Que Lunch	Elementary School	Lunch	[USDA]Meal Pattern SY 2012-2014
<input checked="" type="checkbox"/>	Fiesta Lunch	Elementary School	Lunch	[USDA]Meal Pattern SY 2012-2014
<input type="checkbox"/>	Green Lunch II	Elementary School	Lunch	[USDA]Meal Pattern SY 2012-2014

**Step 3:** The "Assign Menus" screen is shown. The "Meal Type" is "Lunch", "Site Group" is "Elementary School", and "Menu Line" is "Regular". The "Selected Date" is 9/3/2013. The "Existing Menu" is "Bar-B-Que Lunch". The "Assign" button is highlighted.

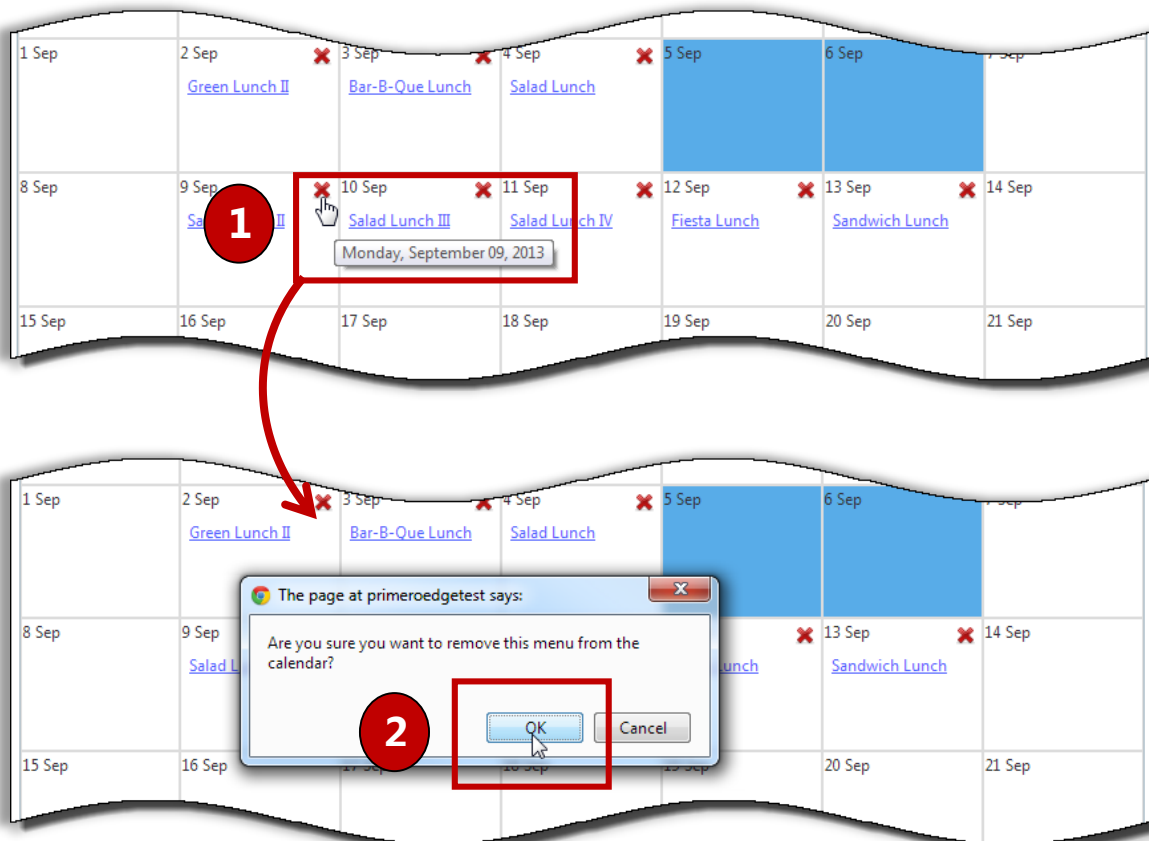
## Removing an Assigned Menu

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

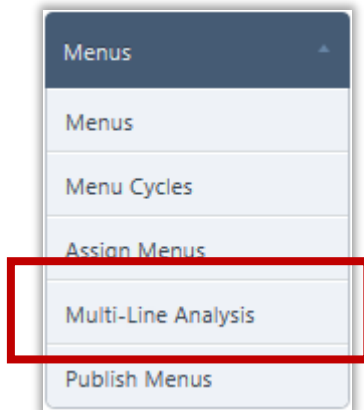
### **To remove an assigned Menu**

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

2. Click  .



## Multi-Line Analysis



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

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


### **Multi-Line Analysis Page**

 The screenshot shows the 'Multi-Line Analysis' page. At the top, there are three dropdown menus: 'Meal Pattern' (set to '-- SELECT--'), 'Meal Type' (set to '-- SELECT--'), and 'Site Group' (set to '-- SELECT--'). Below these are two more dropdowns: 'Days in Week' (set to '5') and 'Menu Cycle Name' (blank). There is a checkbox labeled 'Include Discontinued Menu Cycles' and an 'Apply' button. The page contains two tables. The first table, titled 'Menu Cycles Available', has columns for 'Name' and 'Week to Add' and currently shows 'No records to display.'. The second table, titled 'Menu Cycles Added to Analysis', has columns for 'Name', 'Week Selected', and 'Delete' and also shows 'No records to display.'.

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




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

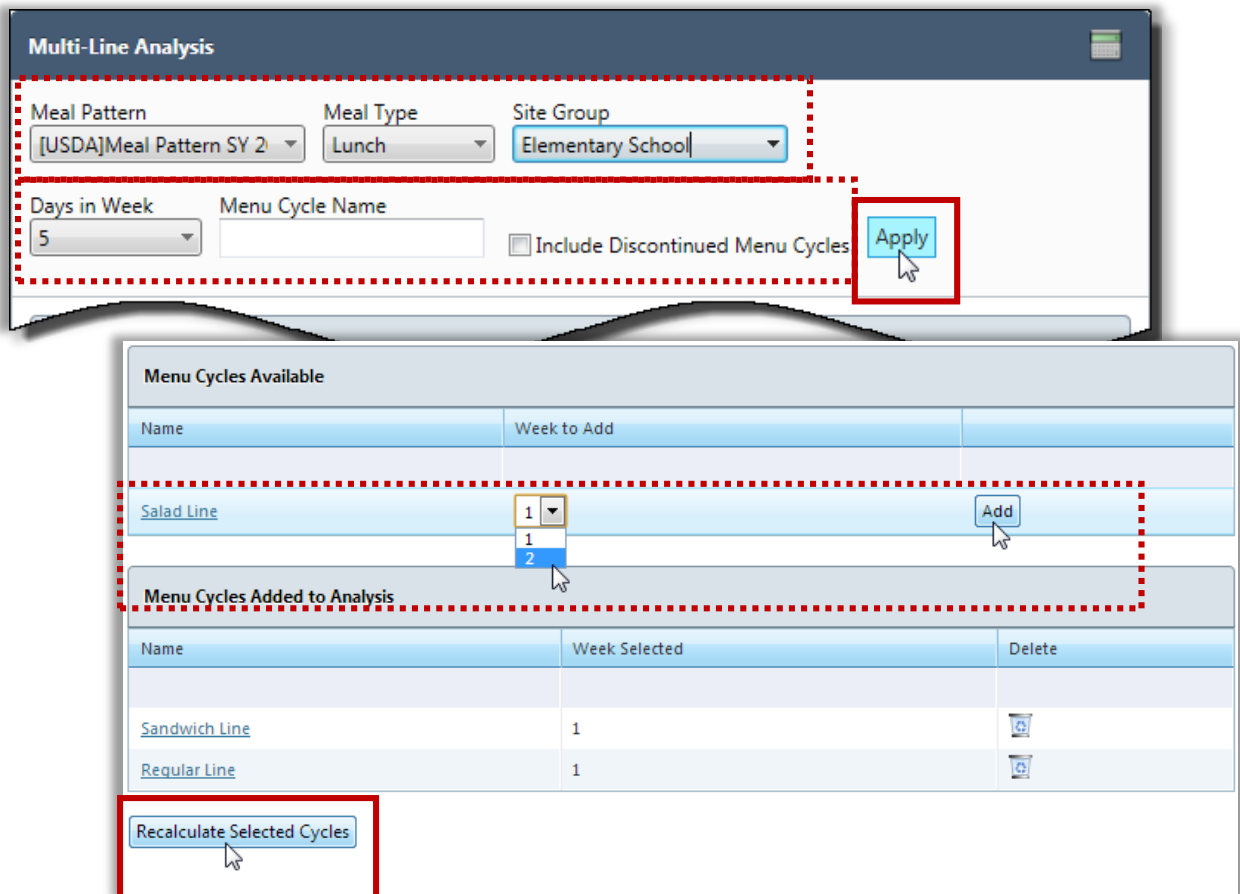
**Page Functions**

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

Generating a Multi-Line Analysis

**To perform a Multi-Line analysis**

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




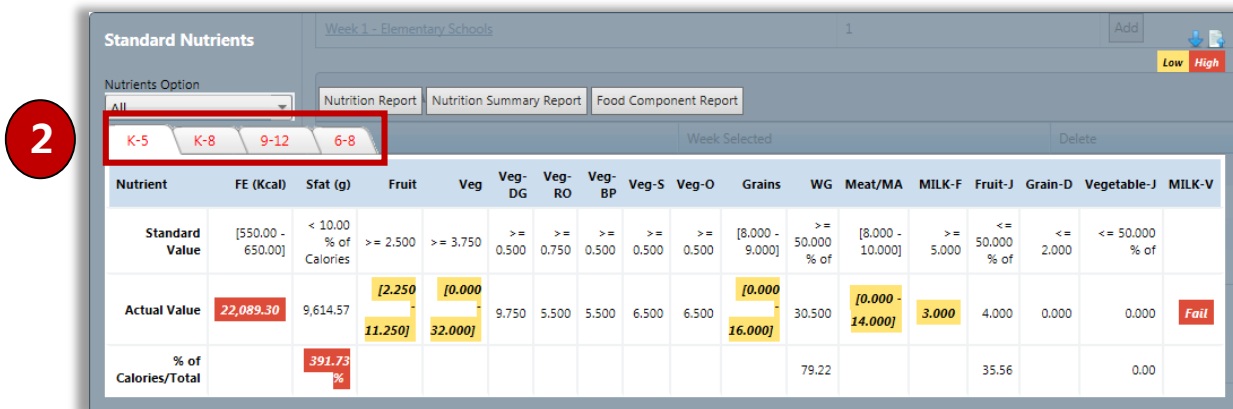
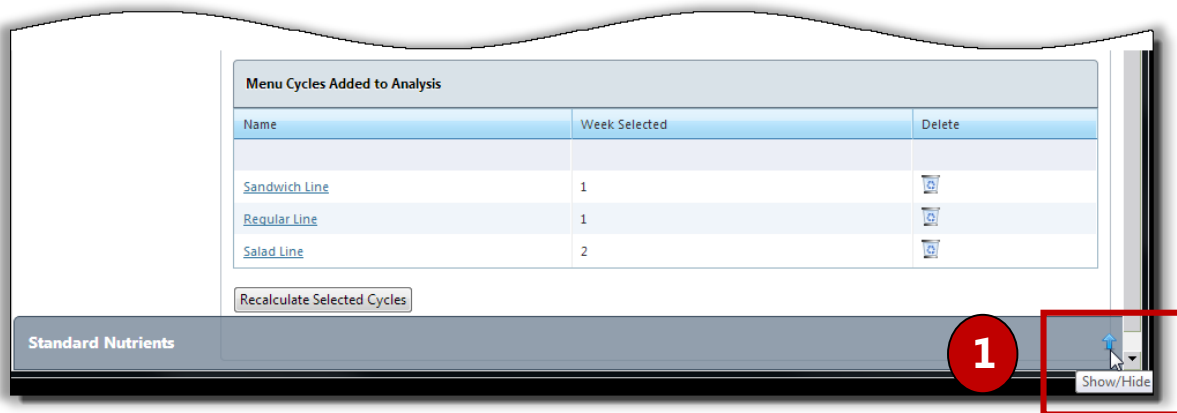
## Viewing Nutrients and Food Components for a Multi-Line Analysis

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


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

### To view Standard Nutrients for a Serving Group

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



### To view Standard Nutrients details for a Serving Group

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

**1**

Nutrient	FE (Kcal)	Sfat (g)	Fruit	Veg	Veg-DG	Veg-RO	Veg-BP	Veg-S	Veg-O	Grains	WG	Meat/MA	MILK-F	Fruit-J	Grain-D	Vegetable-J	MILK-V
Standard Value	[550.00 - 650.00]	< 10.00 % of Calories	>= 2.500	>= 3.750	>= 0.500	>= 0.750	>= 0.500	>= 0.500	>= 0.500	[8.000 - 9.000]	>= 50.000 % of	[8.000 - 10.000]	>= 5.000	<= 50.000 % of	<= 2.000	<= 50.000 % of	
Actual Value	22,089.30	9,614.57	[2.250 - 11.250]	[0.000 - 32.000]	9.750	5.500	5.500	6.500	6.500	[0.000 - 16.000]	30.500	[0.000 - 14.000]	3.000	4.000	0.000	0.000	Fail
% of Calories/Total		391.73 %									79.22			35.56		0.00	

**2**

**3**

Nutrient	Standard Value	Actual Value	% of Calories
FE (Kcal)	[550.00 - 650.00]	22,089.30	218.32 %
Fat (g)		5,358.39	218.32 %
Sfat (g)	< 10.00 % of Calories	9,614.57	391.73 %
TFat (g) <sup>1</sup>		7,467.06	
Chol (mg)		9,008.52	
Na (mg)		7,666.28	
Carb (g)		5,423.89	98.22 %
TDF (g)		4,701.58	
Pro (g)		18,160.04	328.85 %
Fe (mg)		5,552.17	
Ca (mg)		7,963.69	
A,RE		13,501.36	
A,IU		14,871.73	
VitC (mg)		51.71	
Mois (g)		191.12	
Ash (g)		10.34	

**3**

Food Comp.	Standard Value	Actual Value	% of Total
Fruit	>= 2.500	[2.250 - 11.250]	
Veg	>= 3.750	[0.000 - 32.000]	
Veg-DG	>= 0.500	9.750	
Veg-RO	>= 0.750	5.500	
Veg-BP	>= 0.500	5.500	
Veg-S	>= 0.500	6.500	
Veg-O	>= 0.500	6.500	
Grains	[8.000 - 9.000]	[0.000 - 16.000]	
Non-WG		[0.000 - 8.000]	
WG	>= 50.000 % of	30.500	79.22
Meat/MA	[8.000 - 10.000]	[0.000 - 14.000]	
MILK-F	>= 5.000	3.000	
Fruit-J	<= 50.000 % of	4.000	35.56
Grain-D	<= 2.000	0.000	
Vegetable-J	<= 50.000 % of	0.000	0.00

## Generating a Nutrient Analysis Report with a Multi-Line Analysis


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

Calories      Saturated Fat      Calcium

The default selection is “All” which is set through the [Default Nutrients Option](#) system setting. Highlighted report values include

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

### To view Standard Nutrient details for a Serving Group

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

**1**

Nutrient	FE (Kcal)	Sfat (g)	Fruit	Veg	Veg-DG	Veg-RO	Veg-BP	Veg-S	Veg-O	Grains	WG	Meat/MA	MILK-F	Fruit-J	Grain-D	Vegetable-J	MILK-V
Standard Value	[550.00 - 650.00]	< 10.00 % of Calories	>= 2.500	>= 3.750	>= 0.500	>= 0.750	>= 0.500	>= 0.500	>= 0.500	[8.000 - 9.000]	>= 50.000 % of	[8.000 - 10.000]	>= 5.000	<= 50.000 % of	<= 2.000	<= 50.000 % of	
Actual Value	22,089.30	9,614.57	[2.250 - 11.250]	[0.000 - 32.000]	9.750	5.500	5.500	6.500	6.500	[0.000 - 16.000]	30.500	[0.000 - 14.000]	3.000	4.000	0.000	0.000	Fail
% of Calories/Total		391.73 %								79.22				35.56		0.00	

**2**

Nutrient	Sfat (g)	Fruit	Veg	Veg-DG	Veg-RO	Veg-BP	Veg-S	Veg-O	Grains	WG	Meat/MA	MILK-F	Fruit-J	Grain-D	Vegetable-J	MILK-V	
Standard Value	[750.00 - 850.00]	< 10.00 % of Calories	>= 5.000	>= 5.000	>= 0.500	>= 1.250	>= 0.500	>= 0.500	>= 0.750	[10.000 - 12.000]	>= 50.000 % of	[10.000 - 12.000]	>= 5.000	<= 50.000 % of	<= 2.000	<= 50.000 % of	
Actual Value	128,552.14	57,602.95	[1.000 - 3.000]	[15.000 - 19.500]	7.500	3.000	3.000	3.000	3.000	4.000	2.000	[1.000 - 4.500]	1.000	0.000	0.000	0.000	Fail
% of Calories/Total		403.28 %								50.00				0.00		0.00	

**3**

Section 3: Menus

http:// /reportviewer.aspx - Windows Internet Explorer

Generated on: 7/25/2013 8:43:02 AM

### Menu Cycle Week Nutrient Analysis Report

Menu Cycle Name - Regular Line - Week 1, Salad Line - Week 2, Sandwich Line - Week 1  
 Site Group - Middle School Meal Pattern - [USDA]Meal Pattern SY 2012-2014  
 Serving Group - K-8 Calculation Method - Weighted Analysis  
 Meal Type - Lunch Result - **Fail**

Simplified Nutrients Option

Cycle Week Nutrient Summary				Cycle Week Food Component Summary			
Nutrient	Weekly Standard Value	Actual Value	% of Calories	Food Component	Standard Value	Actual Value	% of Total
FE (Kcal)	[600.00 - 650.00]	128,115.63		Fruit	>= 2.500	[2.000 - 4.500]	
Sfat (g)	< 10.00 % of Calories	57,601.52	404.65	Veg	>= 3.750	[0.000 - 6.500]	
Na (mg)		41,152.86		Veg-DG	>= 0.500	5.500	
				Veg-RO	>= 0.750	0.500	
				Veg-BP	>= 0.500	0.500	
				Veg-S	>= 0.500	0.000	
				Veg-O	>= 0.500	0.000	
				Grains	[8.000 - 9.000]	0.000	
				Non-WG		0.000	
				WG	>= 50.000 % of	0.000	
				Meat/MA	[9.000 - 10.000]	[1.000 - 5.500]	
				MILK-F	>= 5.000	1.000	
				Fruit-J	<= 50.000 % of	0.000	0.00
				Grain-D	<= 2.000	0.000	
				Vegetable-J	<= 50.000 % of	0.000	0.00
				MILK-V		Fail	

Legend  
(M) - Missing Nutrient Values

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

http:// /reportviewer.aspx - Windows Internet Explorer

Generated on: 7/25/2013 8:37:05 AM

### Menu Cycle Week Nutrient Analysis Report

Menu Cycle Name - Regular Line - Week 1, Salad Line - Week 2, Sandwich Line - Week 1  
 Site Group - Middle School Meal Pattern - [USDA]Meal Pattern SY 2012-2014  
 Serving Group - K-8 Calculation Method - Weighted Analysis  
 Meal Type - Lunch Result - **Fail**

"All" Nutrients Option

Cycle Week Nutrient Summary				Cycle Week Food Component Summary			
Nutrient	Weekly Standard Value	Actual Value	% of Calories	Food Component	Standard Value	Actual Value	% of Total
FE (Kcal)	[600.00 - 650.00]	128,115.63		Fruit	>= 2.500	[2.000 - 4.500]	
Fat (g)		32,003.07	224.82	Veg	>= 3.750	[0.000 - 6.500]	
Sfat (g)	< 10.00 % of Calories	57,601.52	404.65	Veg-DG	>= 0.500	5.500	
TFat (g)(1)		44,800.03		Veg-RO	>= 0.750	0.500	
Chol (mg)		53,765.11		Veg-BP	>= 0.500	0.500	
Na (mg)		41,152.86		Veg-S	>= 0.500	0.000	
Carb (g)		32,015.87	99.96	Veg-O	>= 0.500	0.000	
TDF (g)		28,161.88		Grains	[8.000 - 9.000]	0.000	
		108,803.15	339.70	Non-WG		0.000	
		33,283.76		WG	>= 50.000 % of	0.000	
		46,176.43		Meat/MA	[9.000 - 10.000]	[1.000 - 5.500]	
A.RE		79,489.16		MILK-F	>= 5.000	1.000	
A.IU		81,291.98		Fruit-J	<= 50.000 % of	0.000	0.00
VitC (mg)		8.70		Grain-D	<= 2.000	0.000	
Mois (g)		5.66		Vegetable-J	<= 50.000 % of	0.000	0.00
Ash (g)		2.31		MILK-V		Fail	

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

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

Page: 1 of 2



http://reportviewer.aspx - Internet Explorer

Generated on: 11/15/2013 3:23:40 PM

### Menu Cycle Week Nutrient Analysis Report

COUNTY

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

Site Group - Middle School      Meal Pattern - [USDA]Meal Pattern SY 2012-2014

Serving Group - K-5      Calculation Method - Weighted Analysis

Meal Type - Lunch      Result - **Fail**

Cycle Week Nutrient Summary				Cycle Week Food Component Summary			
Nutrient	Weekly Standard Value	Actual Value	% of Calories	Food Component	Standard Value	Actual Value	% of Total
FE (Kcal)	[550.00 - 650.00]	69,021.99		Fruit	>= 2.500	[2.250 - 12.250]	
Fat (g)		17,091.71	222.86	Veg	>= 3.750	[0.000 - 32.000]	
Sfat (g)	< 10.00 % of Calories	30,734.57	400.76	Veg-DG	>= 0.500	9.750	
Na (mg)		22,684.61		Veg-RO	>= 0.750	5.500	
Carb (g)		17,157.20	99.43	Veg-BP	>= 0.500	5.500	
Pro (g)		58,053.35	336.43	Veg-S	>= 0.500	6.500	
				Veg-O	>= 0.500	6.500	
				Grains	[8.000 - 9.000]	[0.000 - 16.000]	
				Non-WG		[0.000 - 8.000]	
				WG	>= 50.000 % of	31.500	79.75
				Meat/MA	[8.000 - 10.000]	[0.000 - 14.000]	
				MILK-F	>= 5.000	3.000	
				Fruit-J	<= 50.000 % of	4.000	32.65
				Grain-D	<= 2.000	0.000	
				Vegetable-J	<= 50.000 % of	0.000	0.00
				MILK-V		Fail	

**Legend**  
(M) - Missing Nutrient Values

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

**“Expanded” Nutrients Option**

Page: 1 of 6

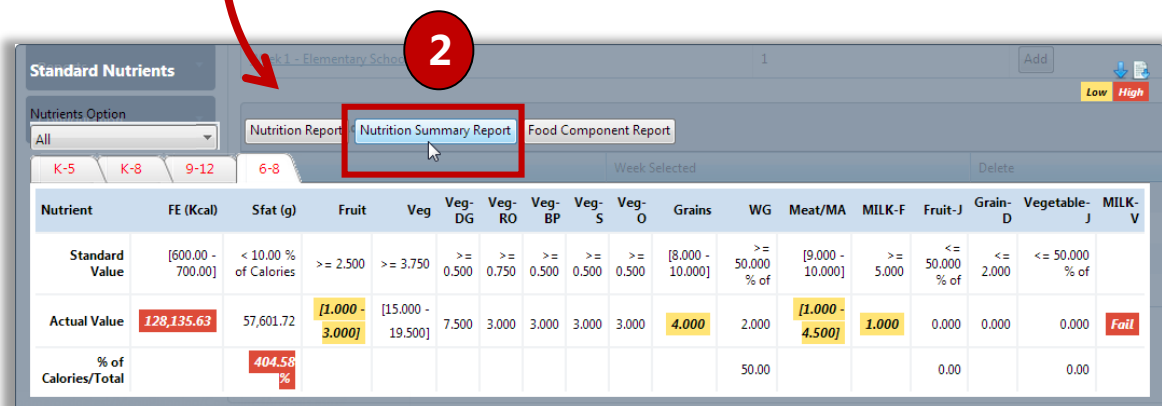
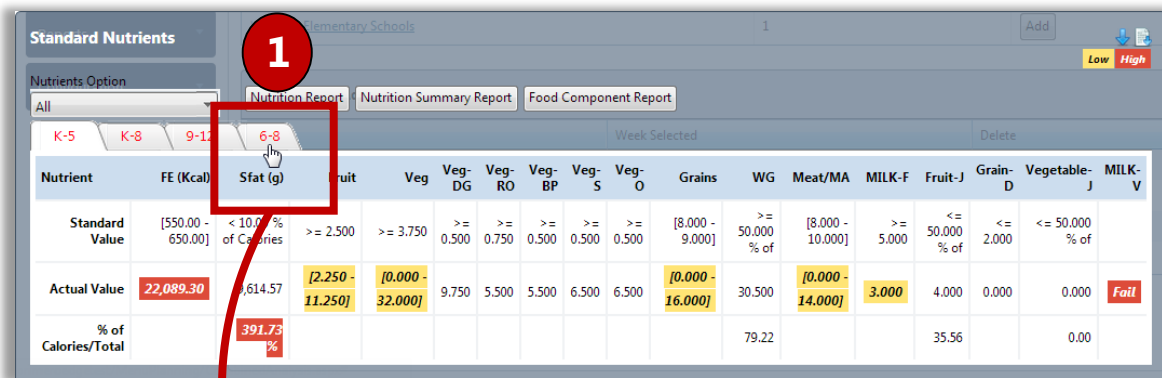
## Generating a Nutrition Summary Report with a Multi-Line Analysis

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

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

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

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



http:// /reportviewer.aspx - Windows Internet Explorer

1 of 1 100% Find | Next

Generated on: 8/30/2013 3:55:04 PM

### Menu Cycle Week Nutrient Summary Report

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

Site Group - Middle School Meal Pattern - [USDA]Meal Pattern SY 2012-2014

Serving Group - 6-8 Calculation Method - Weighted Analysis

Meal Type - Lunch

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

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

Page: 1 of 1

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

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

Highlighted report values include

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

### To view Standard Nutrient details for a Serving Group

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

**Standard Nutrients** - Week 1 - Elementary Schools

Nutrients Option: All

Nutrition Report | Nutrition Summary Report | **Food Component Report**

Serving Groups: K-5 | K-8 | **9-12** | 6-8

Nutrient	FE (Kcal)	Sfat (g)	Fruit	Veg	Veg-DG	Veg-RO	Veg-BP	Veg-S	Veg-O	Grains	WG	Meat/MA	MILK-F	Fruit-J	Grain-D	Vegetable-J	MILK-V
Standard Value	[550.00 - 650.00]	< 10.00 % of Calories	>= 2.500	>= 3.750	>= 0.500	>= 0.750	>= 0.500	>= 0.500	>= 0.500	[8.000 - 9.000]	>= 50.000 % of	[8.000 - 10.000]	>= 5.000	<= 50.000 % of	<= 2.000	<= 50.000 % of	
Actual Value	<b>22,089.30</b>	9,614.57	[2.250] [11.250]	[0.000] [32.000]	9.750	5.500	5.500	6.500	6.500	[0.000] [16.000]	30.500	[0.000 - 14.000]	<b>3.000</b>	4.000	0.000	0.000	<b>Fail</b>
% of Calories/Total		<b>391.73</b> %									79.22			35.56			0.00

**Standard Nutrients** - Week 1 - Elementary Schools

Nutrients Option: All

Nutrition Report | Nutrition Summary Report | **Food Component Report**

Serving Groups: K-5 | K-8 | 9-12 | 6-8

Nutrient	FE (Kcal)	Sfat (g)	Fruit	Veg	Veg-DG	Veg-RO	Veg-BP	Veg-S	Veg-O	Grains	WG	Meat/MA	MILK-F	Fruit-J	Grain-D	Vegetable-J	MILK-V
Standard Value	[750.00 - 850.00]	< 10.00 % of Calories	>= 5.000	>= 5.000	>= 0.500	>= 1.250	>= 0.500	>= 0.500	>= 0.750	[10.000 - 12.000]	>= 50.000 % of	[10.000 - 12.000]	>= 5.000	<= 50.000 % of	<= 2.000	<= 50.000 % of	
Actual Value	<b>128,552.14</b>	57,602.95	[1.000] [3.000]	[15.000] [19.500]	7.500	3.000	3.000	3.000	3.000	<b>4.000</b>	2.000	[1.000 - 4.500]	<b>1.000</b>	0.000	0.000	0.000	<b>Fail</b>
% of Calories/Total		<b>403.28</b> %									50.00			0.00			0.00

http://.../reportviewer.aspx - Internet Explorer

Generated on: 11/15/2013 03:59:59 PM

### Weekly Food Component Report

COUNTY

Menu Cycle Name - Regular Line - Week 1, Sandwich Line - Week 1, Salad Line - Week 2  
 Site Group - Elementary School Meal Pattern - [USDA]Meal Pattern SY 2012-2014  
 Serving Group - K-5 Meal Type - Lunch

Fruit (cups)	Day 1	Day 2	Day 3	Day 4	Day 5	Weekly Total	Weekly Requirement	Weekly Requirement Check
Minimum Fruits (cups)	[0.000 - 2.500] (Fail)	[0.000 - 2.500] (Fail)	[0.000 - 2.500] (Fail)	[1.000 - 1.750] (Pass)	[1.250 - 3.000] (Pass)	[2.250 - 12.250]	≥ 2.500	Fail
<b>Weekly Fruit Juice Limit Requirement</b>	<b>Total Weekly Fruit</b>	<b>Total Weekly Fruit Juice</b>	<b>Percent of Total Weekly Fruit that is Juice</b>	<b>Weekly Requirement Check</b>				
≤ 50.000 % of	12.250	4.000	32.653%	Pass				

Vegetables (cups)	Day 1	Day 2	Day 3	Day 4	Day 5	Weekly Total	Weekly Requirement	Weekly Requirement Check
Vegetables (cups)	[0.000 - 10.000] (Fail)	0.000 (Fail)	[0.000 - 4.500] (Fail)	[0.000 - 15.000] (Fail)	[0.000 - 2.500] (Fail)	[0.000 - 32.000]	≥ 3.750	Fail
Dark Green	2.000	0.000	4.500	3.000	0.250	9.750	≥ 0.500	Pass
Red/Orange	2.000	0.000	0.250	3.000	0.250	5.500	≥ 0.750	Pass
Beans/Peas (Legumes)	2.000	0.000	0.000	3.000	0.500	5.500	≥ 0.500	Pass
Starchy	2.000	0.000	0.500	3.000	1.000	6.500	≥ 0.500	Pass
Other	2.000	0.000	0.250	3.000	1.250	6.500	≥ 0.500	Pass
<b>Weekly Vegetable Juice Limit Requirement</b>	<b>Total Weekly Vegetables</b>	<b>Total Weekly Vegetable Juice</b>	<b>Percent of Total Weekly Vegetables that is Juice</b>	<b>Weekly Requirement Check</b>				
≤ 50.000 % of	32.000	0.000	0.000%	Pass				

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

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

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

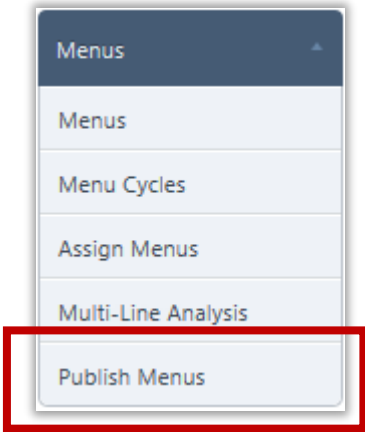
Page: 1 of 1

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

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

## Publish Menu

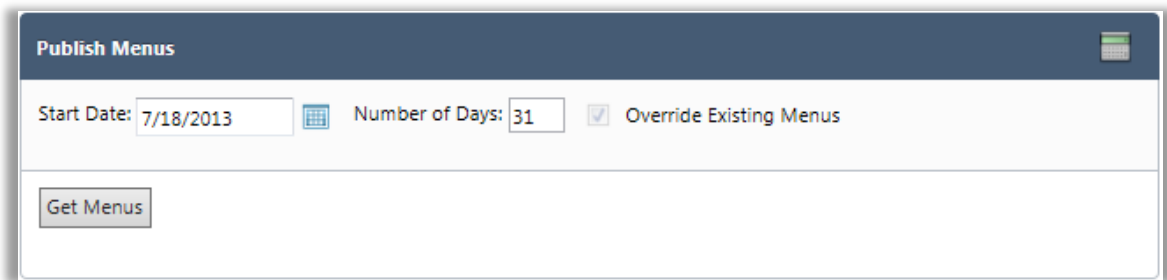


**Publish Menu** allows the Menu Planner to place one or more days of assigned menus on the Parent Online web site. This in turn allows parents to view menus scheduled for their child’s school.

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

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


### ***Publish Menu Page***



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

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

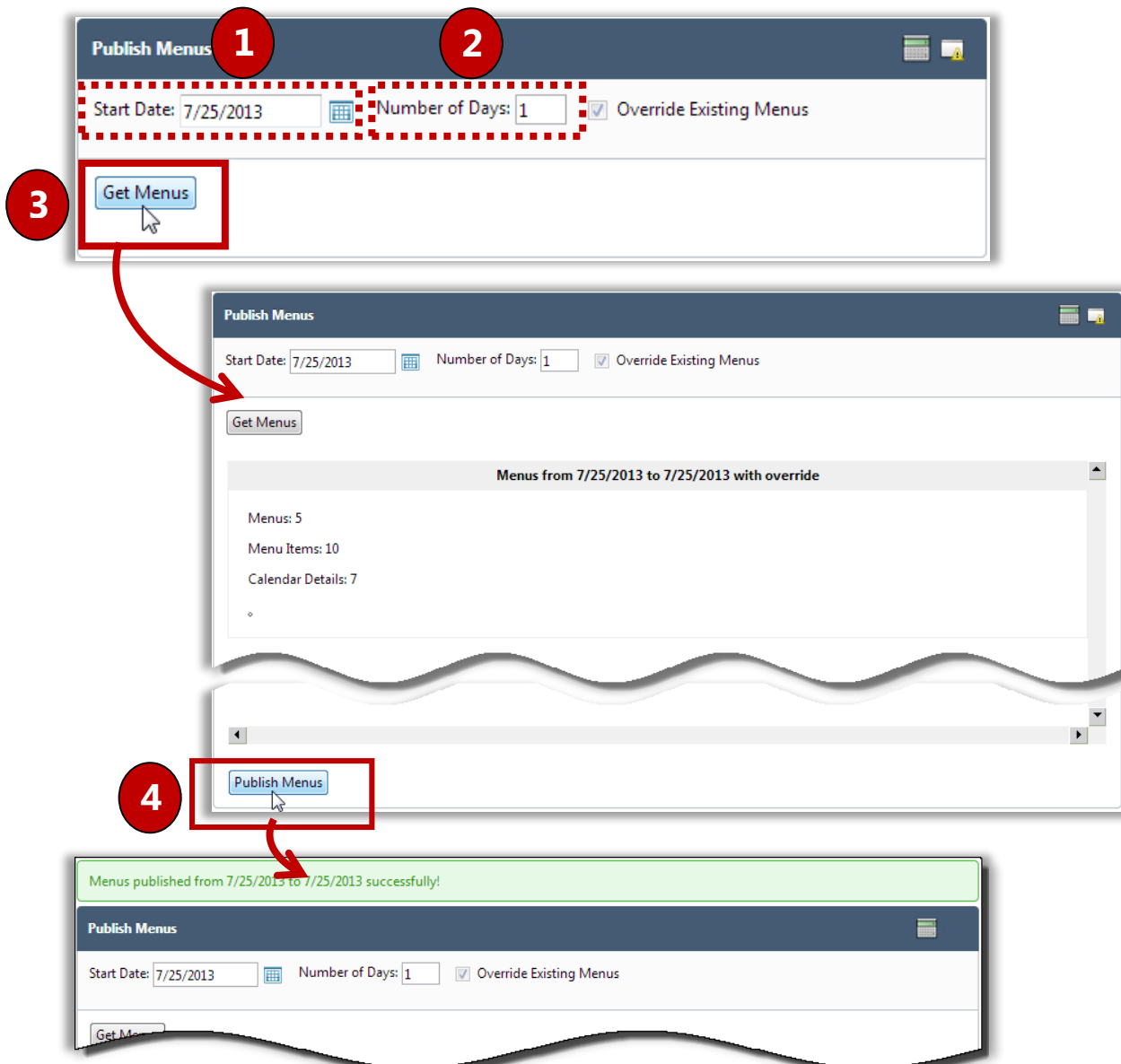
### ***Page Functions***

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

## Publishing Menus to Parent Online

### *To publish Menus to Parent Online*

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



◀ *End of Section* ▶



# 4 Reports

In this chapter you will learn:

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

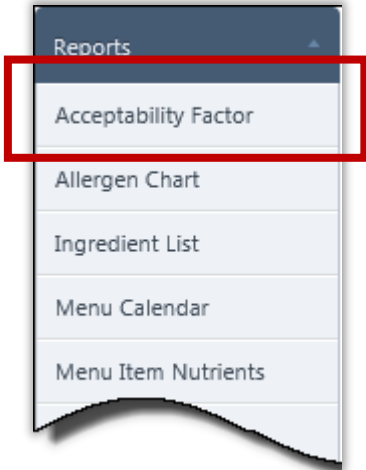
## Reports at a Glance

Menu Function	Description
Acceptability Factor	Generates a report of all planned counts for menu items.
Allergen Chart	Displays a list of all allergens found in all Menu Items included on Menus for a selected date range.
Ingredient List	Generates a report of nutrients for a selected set of ingredients identified by tags, data source, and either “As Purchased” or “As Served”.
Menu Calendar	Generates one of two reports: <ul style="list-style-type: none"> <li>▪ Menu Calendar – report of menu items served for a selected month</li> <li>▪ Menu Calendar – report of nutrients of menu items served for a selected month</li> </ul>
Menu Item Nutrients	Generates a report of selected nutrients for a selected data source, Meal Pattern and Serving Group.
Nutrient Standards	Generates a report of all current nutrient standards or requirements for each Serving Group in a selected Meal Pattern.
Recipe Book	Prints all recipes for a selected data source; recipes are ordered by recipe code; each recipe starts on a new page and provides detailed nutrient information.
Recipe Costing Report	Generates a report of all recipes for the district and provides serving size, number of servings, and cost per serving dollar number.
Recipe Nutrition	Generates a report of nutrient information for one (1) serving and 100 gm of a selected recipe.
Weekly Nutrient Analysis	Generates the Standard Nutrient footer for a Menu or Menu Cycle; nutrient values and food component counts can be viewed; Nutrient Analysis Report can be generated for a Menu or Menu Cycle; Food Component Report can be generated for a Menu Cycle.

### Note

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

# Acceptability Factor

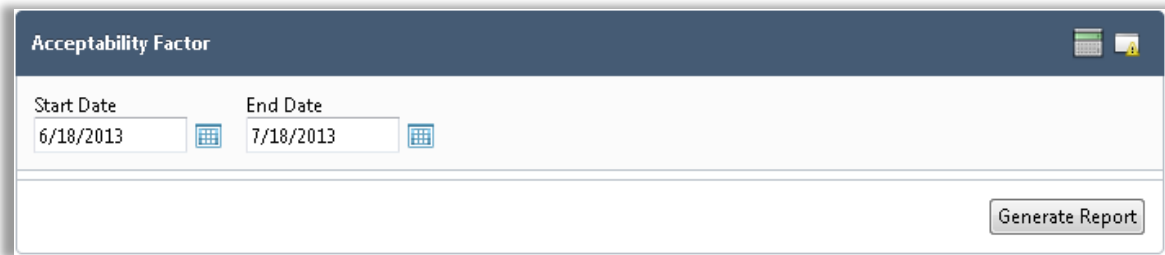


**Acceptability Factor** provides aggregate information on planned counts for all menu items to assist the nutritionist in setting weighted counts.

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

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

## Acceptability Factor Page



By default on the **Acceptability Factor** page

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

## Generating an Acceptability Factor Report

### To generate an Acceptability Factor report

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

Acceptability Factor

Start Date: 4/1/2013      End Date: 4/30/2013

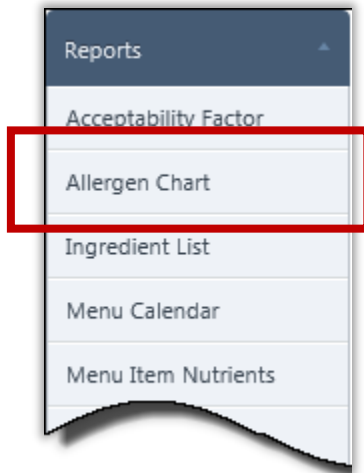
Generate Report

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

## Allergen Chart



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

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

### *Allergen Chart Page*

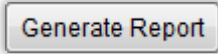


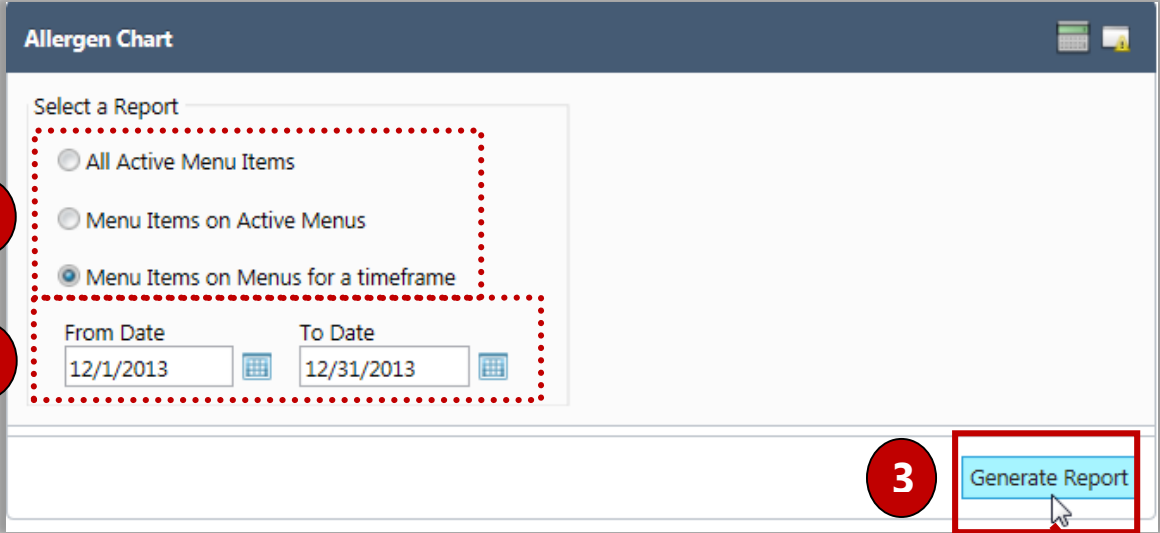
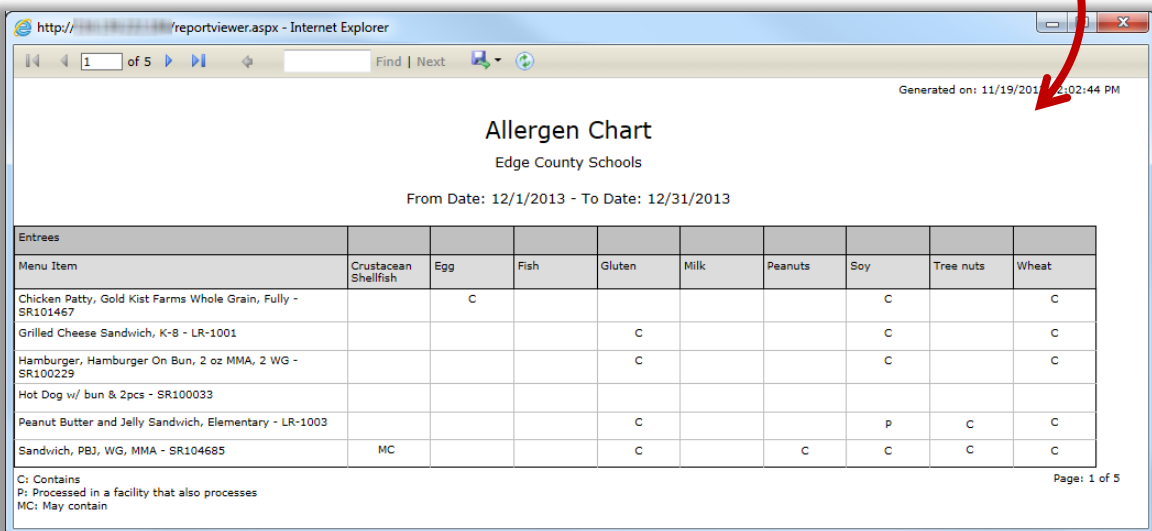
By default on the **Allergen Chart** page

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

## Generating an Allergen Chart

### To generate an Allergen Chart

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

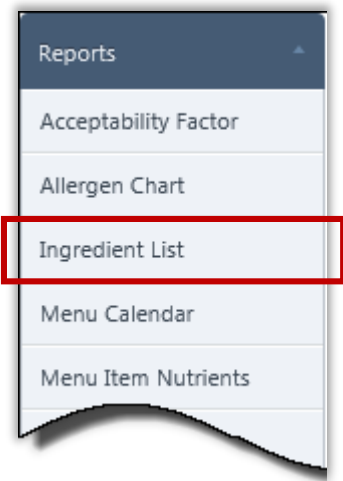



Entrees	Crustacean Shellfish	Egg	Fish	Gluten	Milk	Peanuts	Soy	Tree nuts	Wheat
Chicken Patty, Gold Kist Farms Whole Grain, Fully - SR101467		C					C		C
Grilled Cheese Sandwich, K-8 - LR-1001				C			C		C
Hamburger, Hamburger On Bun, 2 oz MMA, 2 WG - SR100229				C			C		C
Hot Dog w/ bun & 2pcs - SR100033									
Peanut Butter and Jelly Sandwich, Elementary - LR-1003				C			P	C	C
Sandwich, PBJ, WG, MMA - SR104685	MC			C		C	C	C	C

C: Contains  
P: Processed in a facility that also processes  
MC: May contain

Page: 1 of 5

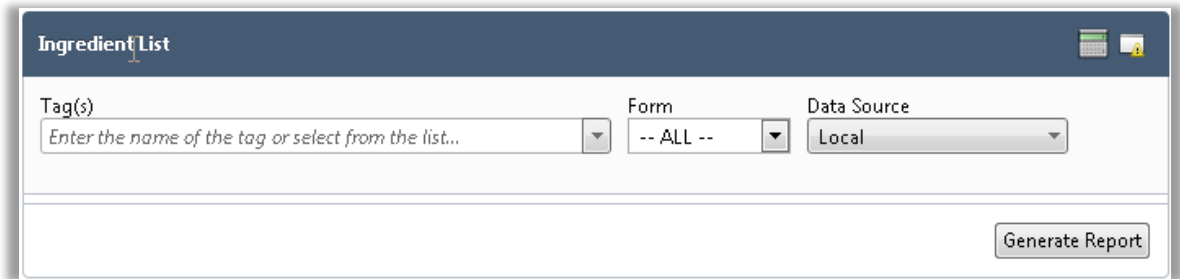
# Ingredient List



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

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

## **Ingredient List Page**

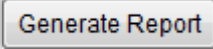


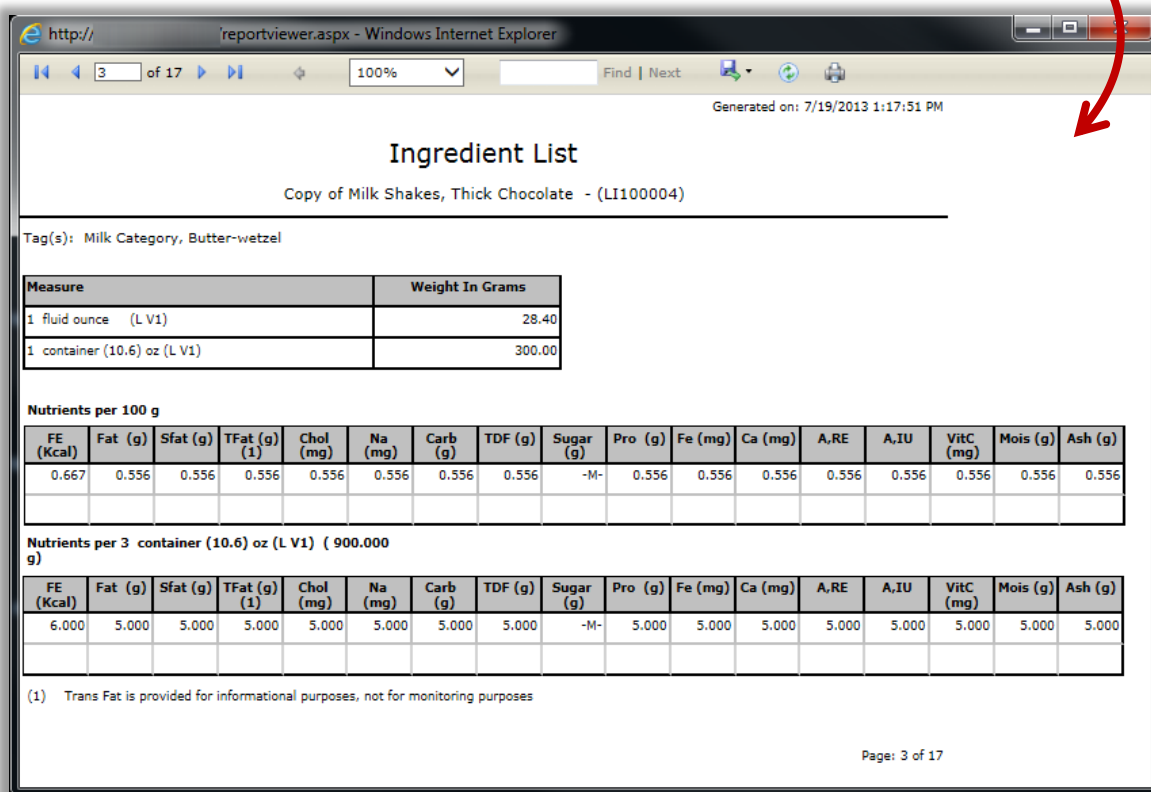
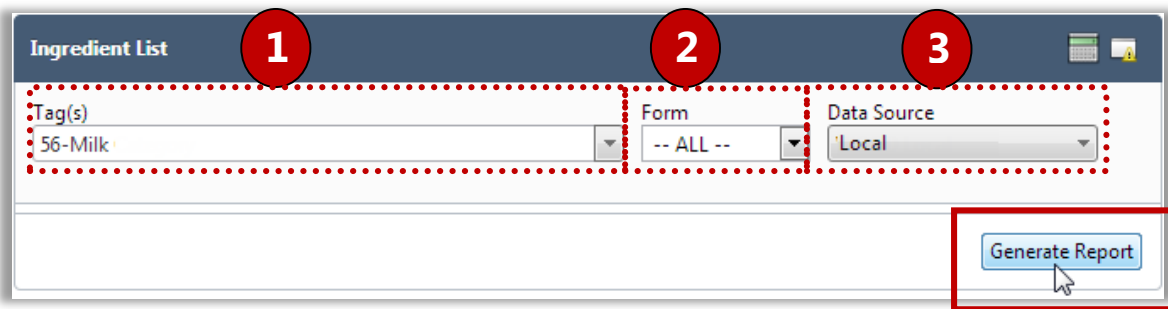
By default on the **Ingredient List** page

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

## Generating an Ingredient List Report

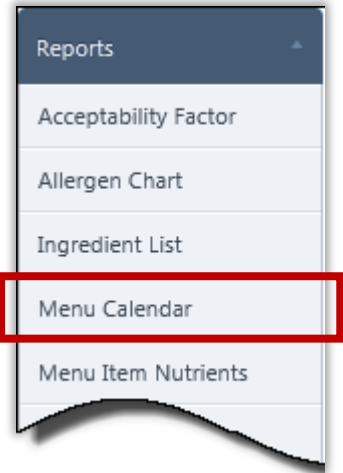
### To generate an Ingredient List report

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





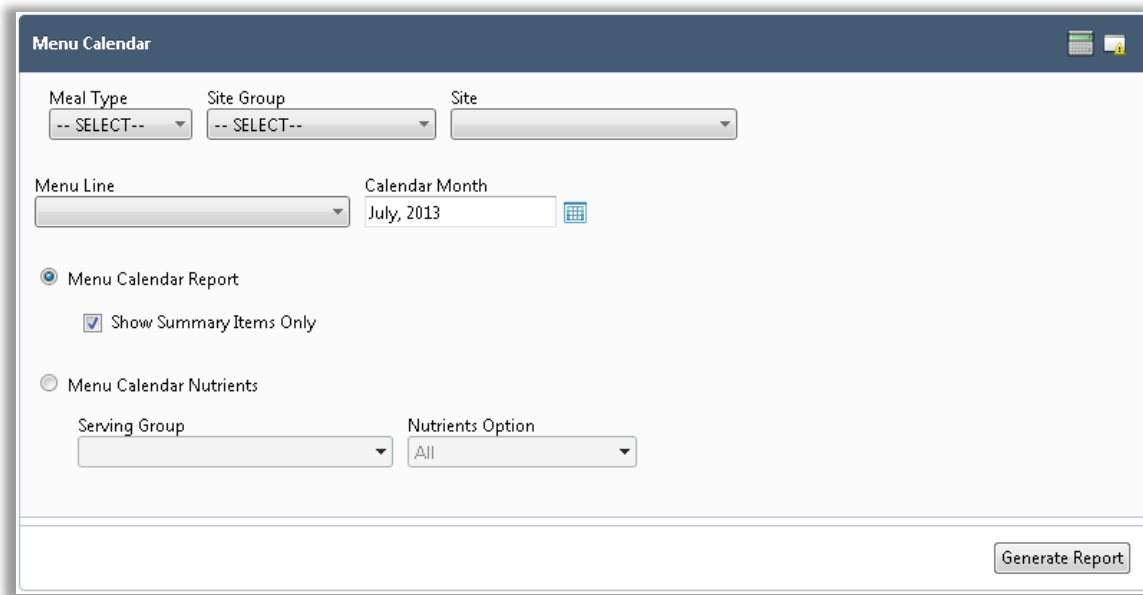
# Menu Calendar



**Menu Calendar** displays either:

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

## Menu Calendar Page

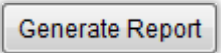


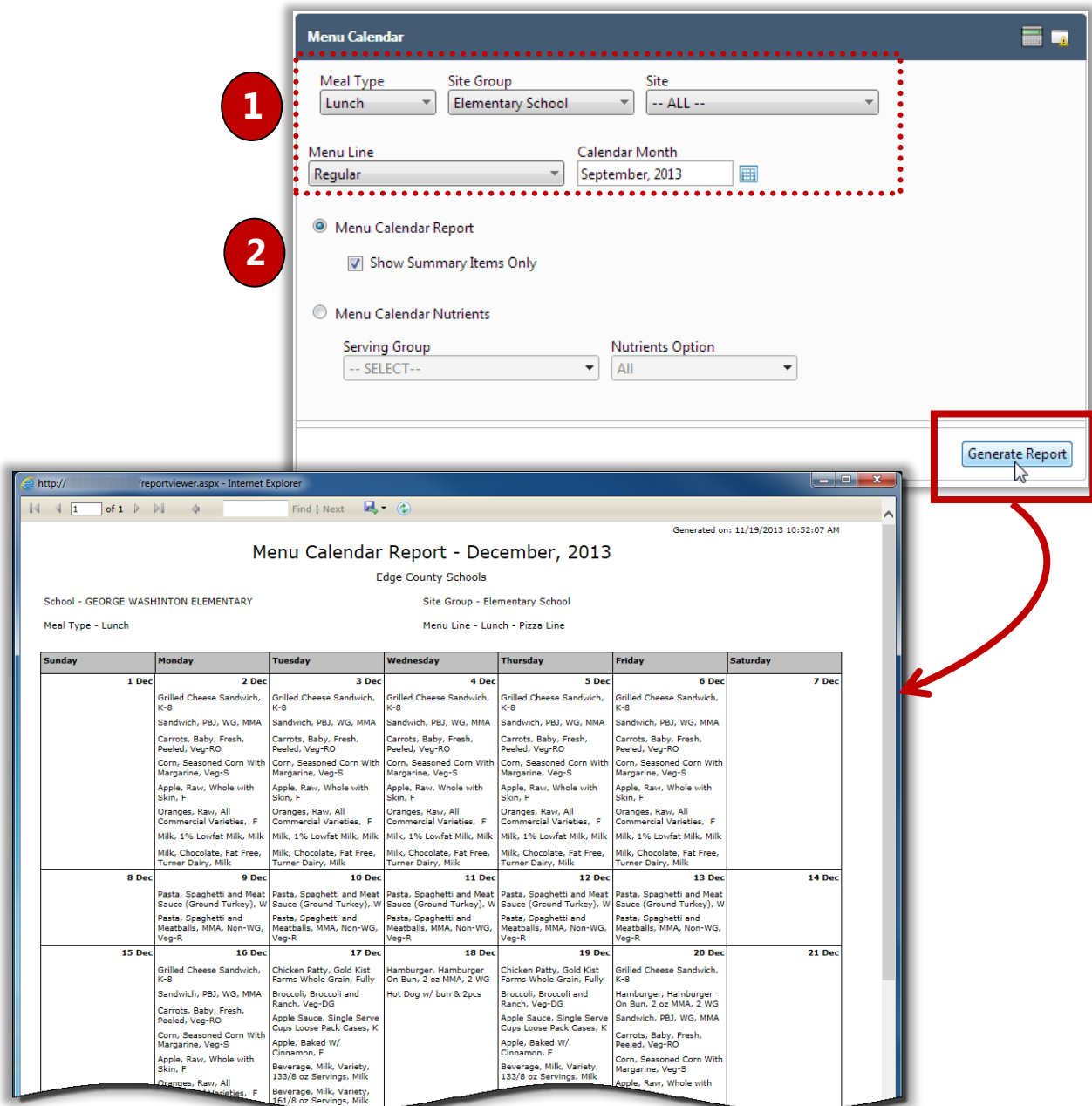
By default, on the **Menu Calendar** page:

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

## Generating a Menu Calendar Report

### To generate a Menu Calendar report

1. Select **Meal Type**, **Site Group**, and **Menu Line**; select **Site** and **Calendar Month**, if needed.
2. Clear **Show Summary Items Only** to include detailed Menu Item descriptions.
3. Click  .



The screenshot shows the 'Menu Calendar' application window. A red dashed box highlights the selection fields: Meal Type (Lunch), Site Group (Elementary School), Site (-- ALL --), Menu Line (Regular), and Calendar Month (September, 2013). A red circle with the number '1' points to this area. Below, the 'Menu Calendar Report' radio button is selected, and the 'Show Summary Items Only' checkbox is checked. A red circle with the number '2' points to this checkbox. A red box highlights the 'Generate Report' button, with a red arrow pointing to the report viewer below.

The report viewer displays the following report:

Menu Calendar Report - December, 2013  
 Edge County Schools  
 School - GEORGE WASHINGTON ELEMENTARY Site Group - Elementary School  
 Meal Type - Lunch Menu Line - Lunch - Pizza Line  
 Generated on: 11/19/2013 10:52:07 AM

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
1 Dec	2 Dec	3 Dec	4 Dec	5 Dec	6 Dec	7 Dec
	Grilled Cheese Sandwich, K-8 Sandwich, PBJ, WG, MMA Carrots, Baby, Fresh, Peeled, Veg-RO Corn, Seasoned Corn With Margarine, Veg-S Apple, Ravv, Whole with Skin, F Oranges, Ravv, All Commercial Varieties, F Milk, 1% Lowfat Milk, Milk Milk, Chocolate, Fat Free, Turner Dairy, Milk	Grilled Cheese Sandwich, K-8 Sandwich, PBJ, WG, MMA Carrots, Baby, Fresh, Peeled, Veg-RO Corn, Seasoned Corn With Margarine, Veg-S Apple, Ravv, Whole with Skin, F Oranges, Ravv, All Commercial Varieties, F Milk, 1% Lowfat Milk, Milk Milk, Chocolate, Fat Free, Turner Dairy, Milk	Grilled Cheese Sandwich, K-8 Sandwich, PBJ, WG, MMA Carrots, Baby, Fresh, Peeled, Veg-RO Corn, Seasoned Corn With Margarine, Veg-S Apple, Ravv, Whole with Skin, F Oranges, Ravv, All Commercial Varieties, F Milk, 1% Lowfat Milk, Milk Milk, Chocolate, Fat Free, Turner Dairy, Milk	Grilled Cheese Sandwich, K-8 Sandwich, PBJ, WG, MMA Carrots, Baby, Fresh, Peeled, Veg-RO Corn, Seasoned Corn With Margarine, Veg-S Apple, Ravv, Whole with Skin, F Oranges, Ravv, All Commercial Varieties, F Milk, 1% Lowfat Milk, Milk Milk, Chocolate, Fat Free, Turner Dairy, Milk	Grilled Cheese Sandwich, K-8 Sandwich, PBJ, WG, MMA Carrots, Baby, Fresh, Peeled, Veg-RO Corn, Seasoned Corn With Margarine, Veg-S Apple, Ravv, Whole with Skin, F Oranges, Ravv, All Commercial Varieties, F Milk, 1% Lowfat Milk, Milk Milk, Chocolate, Fat Free, Turner Dairy, Milk	
8 Dec	9 Dec	10 Dec	11 Dec	12 Dec	13 Dec	14 Dec
	Pasta, Spaghetti and Meat Sauce (Ground Turkey), W Pasta, Spaghetti and Meatballs, MMA, Non-WG, Veg-R	Pasta, Spaghetti and Meat Sauce (Ground Turkey), W Pasta, Spaghetti and Meatballs, MMA, Non-WG, Veg-R	Pasta, Spaghetti and Meat Sauce (Ground Turkey), W Pasta, Spaghetti and Meatballs, MMA, Non-WG, Veg-R	Pasta, Spaghetti and Meat Sauce (Ground Turkey), W Pasta, Spaghetti and Meatballs, MMA, Non-WG, Veg-R	Pasta, Spaghetti and Meat Sauce (Ground Turkey), W Pasta, Spaghetti and Meatballs, MMA, Non-WG, Veg-R	
15 Dec	16 Dec	17 Dec	18 Dec	19 Dec	20 Dec	21 Dec
	Grilled Cheese Sandwich, K-8 Sandwich, PBJ, WG, MMA Carrots, Baby, Fresh, Peeled, Veg-RO Corn, Seasoned Corn With Margarine, Veg-S Apple, Ravv, Whole with Skin, F Oranges, Ravv, All Commercial Varieties, F	Chicken Patty, Gold Kist Farms Whole Grain, Fully Broccoli, Broccoli and Ranch, Veg-DG Apple Sauce, Single Serve Cups Loose Pack Cases, K Apple, Baked W/ Cinnamon, F Beverage, Milk, Variety, 133/8 oz Servings, Milk Beverage, Milk, Variety, 161/8 oz Servings, Milk	Hamburger, Hamburger On Bun, 2 oz MMA, 2 WG Hot Dog w/ bun & 2pcs	Chicken Patty, Gold Kist Farms Whole Grain, Fully Broccoli, Broccoli and Ranch, Veg-DG Apple Sauce, Single Serve Cups Loose Pack Cases, K Apple, Baked W/ Cinnamon, F Beverage, Milk, Variety, 133/8 oz Servings, Milk	Grilled Cheese Sandwich, K-8 Hamburger, Hamburger On Bun, 2 oz MMA, 2 WG Sandwich, PBJ, WG, MMA Carrots, Baby, Fresh, Peeled, Veg-RO Corn, Seasoned Corn With Margarine, Veg-S Apple, Ravv, Whole with	

## Generating a Menu Calendar Nutrients Report

### To generate a Menu Calendar Nutrient report

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

The screenshot shows the 'Menu Calendar' interface with the following settings:

- Meal Type: Lunch
- Site Group: Elementary School
- Site: -- ALL --
- Menu Line: Regular
- Calendar Month: September, 2013
- Menu Calendar Nutrients (Selected)
- Serving Group: K-5
- Nutrients Option: Simplified

The 'Generate Report' button is highlighted in a red box. A red arrow points from this button to the report viewer window below.

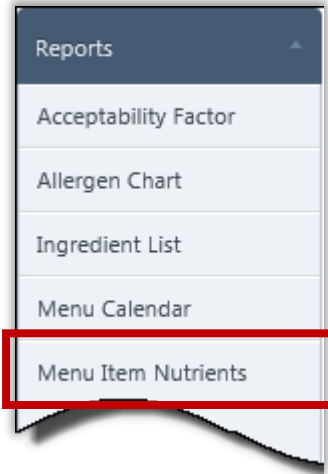
The report viewer window displays the following information:

- Report Title: Menu Calendar Nutrient Analysis Report - December, 2013
- Generated on: 11/19/2013 11:55:12 AM
- School: GEORGE WASHINGTON ELEMENTARY
- Site Group: Elementary School
- Meal Type: Lunch
- Menu Line: Lunch - Pizza Line
- Serving Group: K-5

Item Name (Serving Size)	Planned Qty	FE (Kcal)	Fat (g)	Sfat (g)	Tfat (g)	Chol (mg)	Na (mg)	Carb (g)	TDF (g)	Sugar (g)	Pro (g)	Fe (mg)	Ca (mg)	A,RE	A,IU	VitC (mg)	Mois (g)	Ash (g)	
3039: Spaghetti with Meatballs Lunch - Serving Date: 12/09/2013																			
Pasta, Spaghetti and Meat Sauce (Ground Turkey), W - SR103500 (1 1/2 c.)	0	318.43	6.43	1.38	0.00	55.00	404.00	44.20	6.20	-M-	24.41	2.92	60.01	0.80	404.00	15.00	0.00	0.00	
Pasta, Spaghetti and Meatballs, MMA, Non-WG, Veg-N - SR100022 ( 1/2 serv.)	0	214.75	6.56	2.02	0.00	17.72	501.56	27.79	2.02	4.03	11.13	7.58	40.25	10.13	300.63	8.11	-M-	-M-	
3039: Spaghetti with Meatballs Lunch - Serving Date: 12/10/2013																			
Pasta, Spaghetti and Meat Sauce (Ground Turkey), W - SR103500 (1 1/2 c.)	0	318.43	6.43	1.38	0.00	55.00	404.00	44.20	6.20	-M-	24.41	2.92	60.01	0.80	404.00	15.00	0.00	0.00	
Pasta, Spaghetti and Meat Sauce (Ground Turkey), W - SR103500 (1 1/2 c.)	0	214.75	6.56	2.02	0.00	17.72	501.56	27.79	2.02	4.03	11.13	7.58	40.25	10.13	300.63	8.11	-M-	-M-	
Week 1 Day 1 Elementary - Serving Date: 12/19/2013																			
Chicken Patty, Gold Kist Farms Whole Grain, Fully - SR101467 (1 patty (2.0))	0	216.00	12.00	2.00	0.00	62.00	370.00	13.00	2.00	1.00	14.00	2.00	29.00	14.60	73.00	11.00	-M-	-M-	
Broccoli, Broccoli and Ranch, Veg-DG - SR103735 ( 1/2 cup, chopp)	0	155.47	13.17	2.02	0.00	10.00	395.01	10.02	1.18	2.00	1.28	0.33	41.38	70.00					
Apple Sauce, Single Serve Cups Loose Pack Cases, K - SR100701 (1 Container)	100	90.00	0.00	0.00	0.00	0.00	10.00	22.00	2.00	19.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
Apple, Baked W/ Cinnamon, F - SR102432 (1/2 cup (1/2 c))	0	55.23	0.00	0.00	0.00	0.00	4.61	14.25	0.96	0.00	0.00	1.32	1.10	0.03	0.31	1.09	0.01	0.00	
Beverage, Milk, Variety, 133/8 oz Servings, Milk - SR102643 (8 fl. oz.)	0	125.64	0.23	0.14	0.00	5.89	158.12	22.35	0.00	20.54	8.20	0.14	300.00	100.00	500.00	2.40	-M-	-M-	

A green callout box with the text "All" Nutrients Option is positioned over the bottom right of the report table.

## Menu Item Nutrients



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

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

### Menu Item Nutrients Page

 A screenshot of the 'Menu Item Nutrients' page. At the top, there are three dropdown menus: 'Data Source' (set to 'Local'), 'Meal Pattern' (set to '-- SELECT --'), and 'Serving Group' (empty). Below these is a section with a 'Select All' checkbox and a list of 14 nutrients, each with an unchecked checkbox: Food Energy, Total Fat, Saturated Fat, Trans Fat, Cholesterol, Sodium, Carbohydrate, Total Dietary Fiber, Protein, Iron, Calcium, Vitamin A (RE), Vitamin A (IU), Vitamin C, Moisture, and Ash. At the bottom right, there is a 'Generate Report' button.

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

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

## Generating a Menu Item Nutrients Report

### To generate a Menu Item Nutrients report

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

**1** Data Source: Local

**2** Meal Pattern: [USDA]Meal Pattern SY 2012-2014

**3** Serving Group: K-5

**4**  Select All

Food Energy  Total Fat  Saturated Fat  Trans Fat  Cholesterol  Sodium

Carbohydrate  Total Dietary Fiber  Protein  Iron  Calcium  Vitamin A (RE)

Vitamin A (IU)  Vitamin C  Moisture  Ash

**5** Generate Report

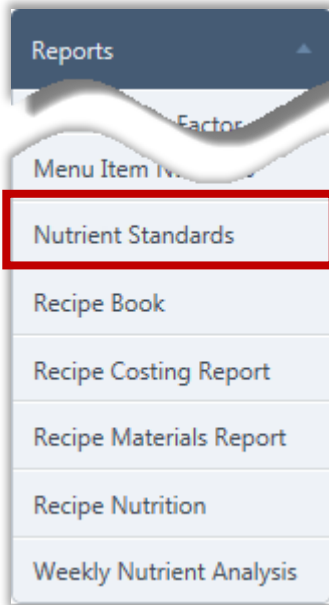
Menu Item Nutrient Report  
Edge County Schools  
Meal Pattern: [USDA]Meal Pattern SY 2012-2014 Serving Group: K-5  
Data Source: Local

Item Name (Serving Size)	FE (Kcal)	Fat (g)	Sfat (g)	Na (mg)	Ca (mg)
Beans, Black (Turtle), MMA - LR-1009 (1/2 c.)	109.00	0.35	0.10	140.00	42.00
Blueberry Muffin, Super Bakery, 9040 - LR-1000 (1 ea.)Contains Milk, Egg, Wheat, Gluten.	160.00	3.50	1.00	190.00	0.00
Copy of Beans, Black, Canned; black, seasoned, brine sauce, 6/#10 (108 oz); as purchased - LR-1010 (1/2 c.)	109.99	0.00	0.00	599.99	43.99
Frozen Juice, Strawberry-Mango, Sidekicks, 100% Juice, Ridgefield's, 225890 - LR-1008 (1 Container)	80.00	0.00	0.00	45.00	80.00
Grilled Cheese 9-12 - LR-1006 (1 sandwich)Contains Wheat, Soy, Gluten.	240.29	7.79	2.81	685.09	438.13
Grilled Cheese K-8 - LR-1005 (1 sandwich)Contains Wheat, Soy, Gluten.	240.29	7.79	2.81	685.09	438.13
Grilled Cheese Sandwich, K-8 - LR-1001 (1 sandwich)Contains Wheat, Soy, Gluten.	248.33	8.67	2.92	723.33	437.15
Honey Bun, Super Bakery, 6012 - LR-1002 (1 ea.)Contains Milk, Egg, Wheat, Soy.	310.00	15.00	5.00	190.00	100.00
Peanut Butter and Jelly Sandwich, Elementary - LR-1003 (1 sandwich)Contains Wheat, Soy, Gluten.	403.60	19.13	4.29	726.88	93.76
Ultra Muffin - Banana, Super Bakery, 9052 - LR-1004 (1 ea.) Contains Milk, Egg, Wheat.	180.00	6.00	1.00	125.00	80.00

Legend  
(M) - Missing Nutrient Values

Page: 1 of 1

## Nutrient Standards



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

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

### ***Nutrient Standards Page***

A screenshot of the 'Nutrient Standards' page in the software. The page has a dark blue header with the title 'Nutrient Standards'. Below the header, there are two dropdown menus: 'Meal Pattern' and 'Meal Type'. The 'Meal Pattern' dropdown is set to '[USDA]Meal Pattern SY 2012-2014' and the 'Meal Type' dropdown is set to 'Lunch'. At the bottom right of the page, there is a button labeled 'Generate Report'.

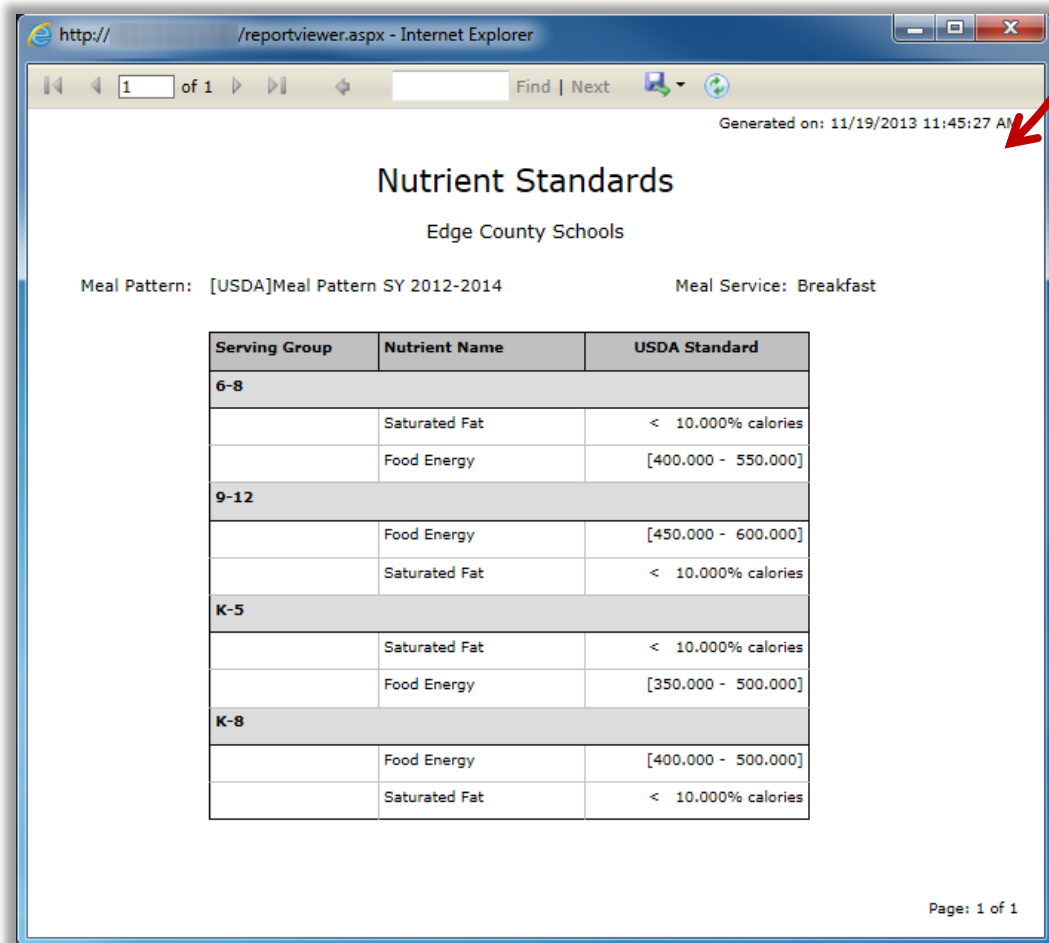
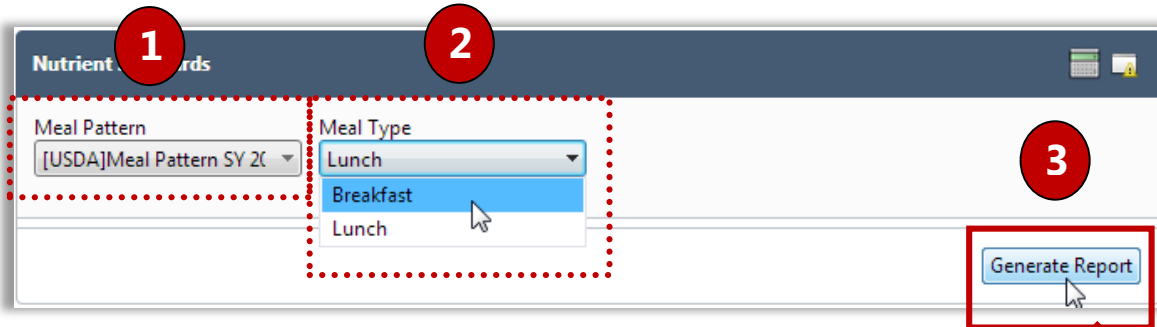
By default on the **Nutrient Standards** page:

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

## Generating a Nutrient Standards Report

### To generate a Nutrient Standards report

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



## Recipe Book



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

Menu Item ingredient pictures can be included in the print when the system setting “**Recipes – Display Pictures in Report**” is set to “Yes.”

### **Recipe Book Page**

A screenshot of the 'Recipe Book' page in a software application. The page has a dark blue header with the title 'Recipe Book' and two icons (a calendar and a warning sign). Below the header is a 'Data Source' dropdown menu with 'Local' selected. At the bottom right of the page is a 'Generate Report' button.

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

- **Data Source** is set to “**Local**”.



## Generating a Recipe Book

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

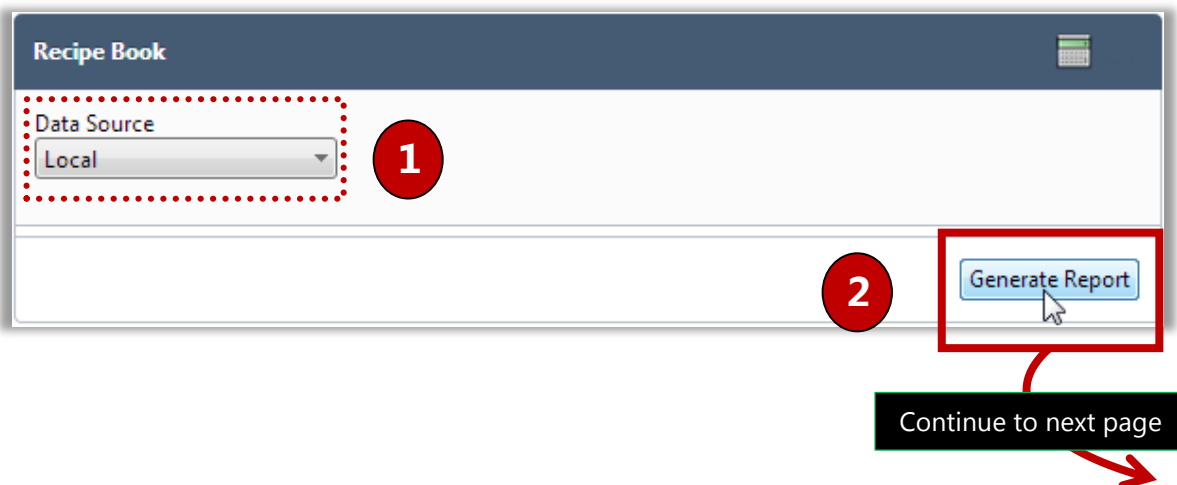
Each recipe includes:

- HACCP Processes, if selected
- Allergens, if selected
- Meal Contributions, if selected
- Serving information
- Stock Items used with pictures when system setting “Recipes – Display Pictures in Reports” is set to “Yes”
- Instructions
- CCP description
- Nutritional information

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

### **To generate a Recipe book**

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



http://.../reportviewer.aspx - Windows Internet Explorer

### Whoopie Pies (LR100002)

HACCP Process: No Cook  
 Allergens: Contains Egg; Processed in a facility that also processes Milk; May contain Wheat;  
 Meal Contribution: 1 CN-slice, thick/large (1/2" thick): 1/4 MILK-F,1/2 Non-WG,1/2 Grain-D,1/2 Veg-RO

---

Number of Servings: 48      Serving Size: 1 CN-slice, thick/large (1/2" thick)  
 Moisture gain/loss%: 0.0000      Yield: 2 Pound, 3 3/8 Ounce  
 Waste gain/loss%: 0.0000      Fat gain/loss% : 0.0000

Stock Item#	Stock Item	Stock Quantity	Ingredient Name	Quantity	Picture
SS-HKM-GNG-381	Carrot Fries , Fried	850 1/2 Gram	test pi LI100001	680 1/2 Gram	
	St-Bagel sesame seed , As Purchased	5 Ounce	Marks Pecan Pies SI100013	5 Ounce	
			Local hot dog LI100002	1 Gram	
WTCS-t1	Milk choclatae- Wood county , juice	6 fluid ounce , 1 no. 100 scoop	Milk Shakes, Thick Chocolate LI100000	6 fluid ounce , 1 no. 100 scoop	

**Preparation Instructions**

- 1 Peel and core apples.
- 2 Place apples in pan.
- 3 Cook at 350 for 45 minutes.
- Put Whoopies in pan with apples.
- Cook for 15 minutes
- spread shake over all.
- put hot dog in pan
- Pour milk shake into batter.
- Beat well.

CCP Name	CCP Description	Critical Temperature	Corrective Action
CRTE	Chill Ready-to-Eat foods	41.00	1. Use a different cooling method for prepared ready-to-eat foods when the food is above 41 °F and less than 4 hours into the cooling process 2. Discard prepared ready-to-eat foods when the food is above 41 °F and more than 4 hours into the cooling process.

**Nutritional Information**

	Fat	SFat	Carb	Protein	Sugar
% of Calories	12.07	1.49	74.52	12.00	(M)

**Nutrients per 100 g**

FE (Kcal)	Fat (g)	Sfat (g)	TFat (g)(1)	Chol (mg)	Na (mg)	Carb (g)	TDF (g)	Sugar (g)(2)	Pro (g)	Fe (mg)(3)	Ca (mg)(4)	A,RE	A,IU(5)	VitC (mg)(6)	Mois (g)	Ash (g)
37.495	0.503	0.062	0.000	0.005	0.000	6.985	0.378	Missing	1.125	44.882	14.994	0.000	0.168	0.000	0.005	0.005

**Nutrients per serving (20.888 g)**

FE (Kcal)	Fat (g)	Sfat (g)	TFat (g)(1)	Chol (mg)	Na (mg)	Carb (g)	TDF (g)	Sugar (g)(2)	Pro (g)	Fe (mg)(3)	Ca (mg)(4)	A,RE	A,IU(5)	VitC (mg)(6)	Mois (g)	Ash (g)
7.832	0.105	0.013	0.000	0.001	0.000	1.459	0.079	Missing	0.235	9.375	3.132	0.000	0.035	0.000	0.001	0.001

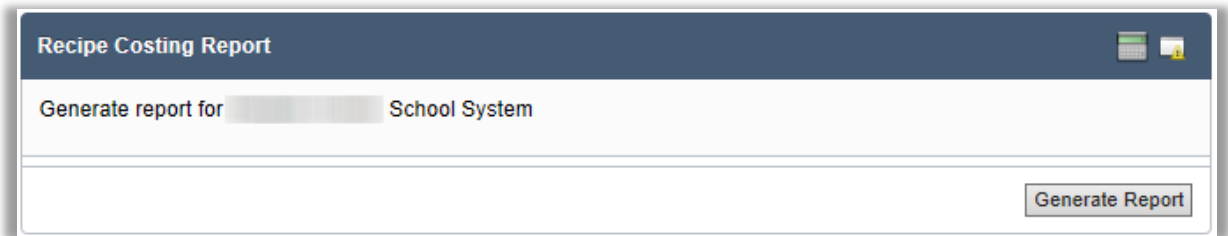
(1) Trans Fat is provided for informational purposes, not for monitoring purposes.  
 (2) This nutrient was added by the developer and not required by USDA for NSMP.  
 (3) Please enter either "Actual Value" or "%DRV" for nutrient Iron.  
 (4) Please enter either "Actual Value" or "%DRV" for nutrient Calcium.  
 (5) Please enter either "Actual Value" or "%DRV" for nutrient Vitamin A(IU).  
 (6) Please enter either "Actual Value" or "%DRV" for nutrient Vitamin C.

# Recipe Costing Report



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

## Recipe Costing Report Page



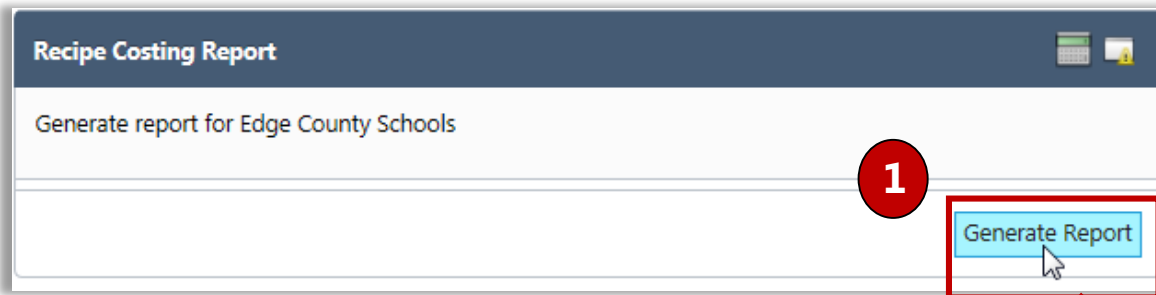
By default on the **Recipe Costing Report** page:

- No options or entries are available or required.

## Generating a Recipe Costing Report

### To generate a Recipe Costing Report

1. Click  .



The screenshot shows a web browser window displaying the "Recipe Costing Report". The browser address bar shows "/Primero/reportviewer.aspx - Windows Internet Explorer". The page title is "Recipe Costing Report" and it includes a timestamp "Generated on: 7/19/2013 4:55:53 PM". Below the title, there are dropdown menus for "District" and "School System". The main content is a table with the following columns: Recipe, Recipe Name, Serving Size, Recipe Material Cost (in \$), Number Of Servings, and Cost Per Serving (in \$). A red arrow from the previous screenshot points to the top right corner of this screenshot.

Recipe	Recipe Name	Serving Size	Recipe Material Cost (in \$)	Number Of Servings	Cost Per Serving (in \$)
LR100005	BBQ Sauce, IND PK	1 packet	0.09	1	0.09
LR100006	Beef & Cheese Burrito, Frozen	1 ea.	0.43	1	0.43
LR100007	Blueberry Muffin	1 muffin	0.27	1	0.27
LR100008	Cheese Cup, Jalapeno	3 ounces	0.29	1	0.29
LR100009	Doritos, Baked	1 Bag	0.22	1	0.22
LR100012	Gravy, White	1/3 c.	6.75	100	0.07
LR100015	Egg & Cheese Biscuit	1 ea.	16.07	50	0.32
LR100016	Fish Strips	4 ea.	11.29	80	0.14
LR100018	Tartar Sauce, Ind	1 pkg.	0.04	1	0.04
LR100019	Hushpuppies-Baked	4 ea.	10.30	80	0.13
LR100020	Hamburger	1 ea.	34.06	100	0.34
LR100021	Cheeseburger w/USDA patty	1 ea.	56.58	100	0.57
LR100022	Salad-Turkey (no croutons)	1 salad	25.19	50	0.50
LR100022	Butter & Jelly Sandwich	1 sandwich	19.99	50	0.39
LR100022		1/2			0.13
LR100428	Hamburger w/		12.25		
LR100429	Roast Pork w/ Gravy	2 oz.	0.37	1	
LR100430	Whole Grain Pancakes	2 ea.	0.04	72	0.00
LR100431	Nachos w/ Cheese Sauce Douglas	3 fl. oz.	13.84	50	0.28
LR100432	Nachos w/Beef & Cheese Sauce Douglas	3 fl. oz.	13.84	50	0.28
LR100433	Chicken Parmesan w/ Sauce-Breaded Filet	1 serv.	53.62	100	0.54
LR100434	Macaroni and Cheese w/ homemade sauce	2/3 c.	20.74	50	0.41
LR100435	Sweet Potato Waffle Fries (McCain's)	1/2 c.	32.15	80	0.40

Page: 8 of 8

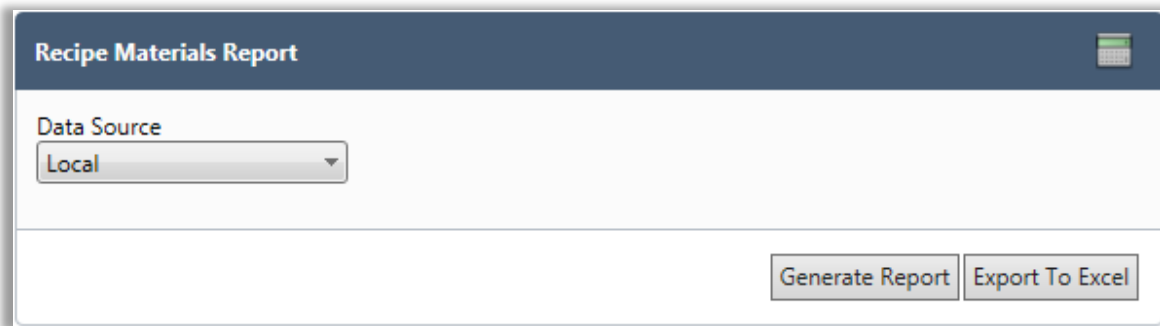
# Recipe Materials Report



**Recipe Materials Report** provides a dollar cost for the materials (items) required to produce each recipe. All items and item quantities required to produce a single recipe are listed.

A report can be generated in the report viewer window and then printed or exported to a file, or the data can be exported directly to an MS Excel file.

## Recipe Materials Report Page



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

- No options or entries are available or required.
- The default Data Source is “Local”; change when needed.

http://.../reportviewer.aspx - Windows Internet Explorer

Generated on: 2/7/2014 2:35:11 PM

### Recipe Materials Report

STONE CREEK SCHOOLS

Item # /Recipe Code	Item Description	Primary Quantity	Primary Unit	Secondary Quantity	Secondary Unit	Broken Unit Size	Broken Units Per Case	Broken Units Needed	Needed Broken Units Cost
<b>Recipe: TR1007 - PB&amp;J Sandwich, Wheat Grape; Servings: 1.000 (136 1/8 Gram)</b>									
FZ082	PB&J Sandwich, Wheat Grape	1.000	Each			136.000 Ounce	72	2.00	1.58
<b>Recipe Cost:</b>									<b>1.58</b>
<b>Recipe: TR1008 - Sandwich, Deli Turkey Ham &amp; Cheese; Servings: 1.000 (1 CN-sandwich)</b>									
FZ100	Sandwich, Deli Turkey Ham & Cheese	1.000	CN-sandwich			4.950 Ounce	50	2.00	1.86
<b>Recipe Cost:</b>									<b>1.86</b>
<b>Recipe: TR1009 - Macaroni &amp; Cheese, Whole Grain; Servings: 1.000 (1 CN-bowl)</b>									
FZ072	Macaroni & Cheese, Whole Grain	1.000	CN-bowl			5.000 Pound	6	1.00	7.65
<b>Recipe Cost:</b>									<b>7.65</b>
<b>Recipe: TR1010 - Burrito, Grilled Bean &amp; Cheese; Servings: 1.000 (1 Each)</b>									
FZ021	Burrito, Grilled Bean & Cheese	1.000	Each			6.500 Ounce	72	1.00	0.62
<b>Recipe Cost:</b>									<b>0.62</b>
<b>Recipe: TR1011 - Pizzata, Pepperoni; Servings: 1.000 (1 Each)</b>									
FZ095	Pizzata, Pepperoni	1.000	Each			2.200 Ounce	180	2.00	0.53
<b>Recipe Cost:</b>									<b>0.53</b>
<b>Recipe: TR1012 - Milk, Nonfat Chocolate 1/2 Pint; Servings: 1.000 (1 Each)</b>									
DR001	Milk, Nonfat Chocolate 1/2 Pint	1.000	Each			8.000 Ounce	70	1.00	0.18
<b>Recipe Cost:</b>									<b>0.18</b>
<b>Recipe: TR1013 - Milk, Nonfat Strawberry 1/2 Pint; Servings: 1.000 (8 fluid ounce )</b>									
DR004	Milk, Nonfat Strawberry 1/2 Pint	8.000	fluid ounce			8.000 Ounce	70	1.00	0.22
<b>Recipe Cost:</b>									<b>0.22</b>
<b>Recipe: TR1014 - Milk, Nonfat White 1/2 Pint; Servings: 1.000 (1 Each)</b>									
DR003	Milk, Nonfat White 1/2 Pint	1.000	Each			8.000 Ounce	70	1.00	0.18
<b>Recipe Cost:</b>									<b>0.18</b>
<b>Recipe: TR1015 - Milk, Soy 1/2 Pint; Servings: 1.000 (8 fluid ounce )</b>									
DR006	Milk, Soy 1/2 Pint	8.000	fluid ounce			8.000 Ounce	12	1.00	0.65
<b>Recipe Cost:</b>									<b>0.65</b>
<b>Recipe: TR1016 - Apples, Red School Boy; Servings: 1.000 (1 CN-CUP, pieces or slices)</b>									
PR003	Apples, Red School Boy	1.000	CN-CUP, pieces or slices			1.000 Each	163	1.00	0.15
<b>Recipe Cost:</b>									<b>0.15</b>
<b>Recipe: TR1017 - Applesauce Cups, Plain; Servings: 1.000 (1 Cup)</b>									
CN004	Applesauce Cups, Plain	1.000	Cup			4.000 Ounce	72	3.00	0.63
<b>Recipe Cost:</b>									<b>0.63</b>

Page: 1 of 2

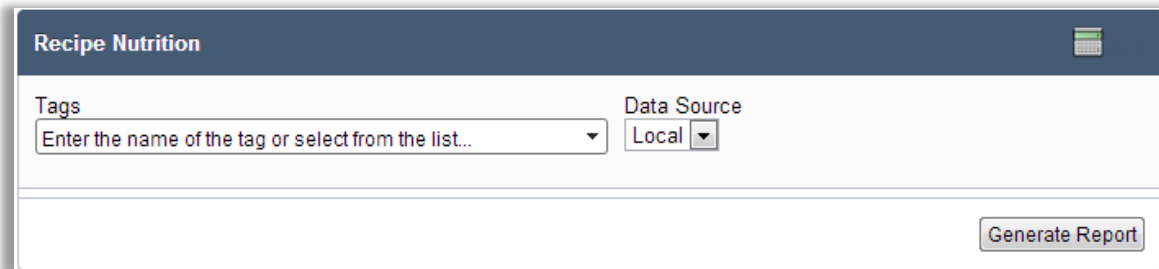
# Recipe Nutrition



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

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

## Recipe Nutrition Page



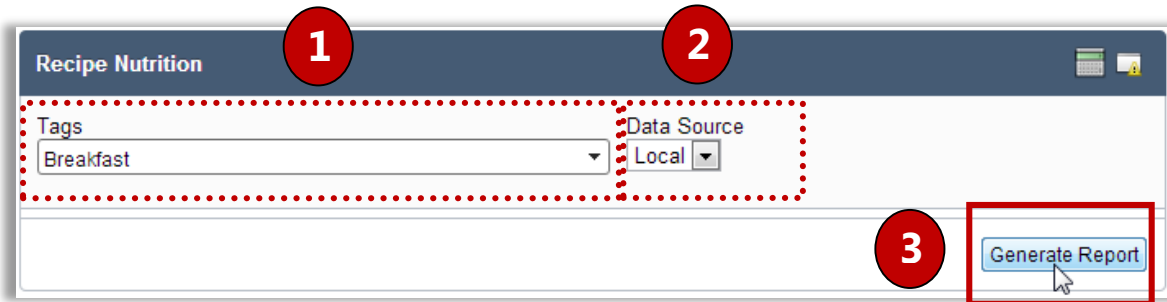
By default on the **Recipe Nutrition** page:

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

## Generating a Recipe Nutrition Report

### To generate a Recipe Nutrition Report

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



Generated on: 11/19/2013 12:52:53 PM

### Recipe

COUNTY

Bagel Half; Bake Crafters, Individually Wrapped; as served - (LR300043)

Tag(s): CN-Baked goods, CN-breads, CN-cakes, CN-cookies, CN-crackers, CN-pies, CN-rolls

Number of Servings: 1.000      Serving Size: 1 piece

Moisture gain/loss%: 0.000      Fat gain/loss% : 0.000

Waste gain/loss%: 0.000

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

(1) This nutrient was added by the developer and not required by USDA for NSMP  
 (2) Please enter either "Actual Value" or "%DRV" for nutrient Iron  
 (3) Please enter either "Actual Value" or "%DRV" for nutrient Calcium  
 (4) Please enter either "Actual Value" or "%DRV" for nutrient Vitamin A(IU)  
 (5) Please enter either "Actual Value" or "%DRV" for nutrient Vitamin C

Page: 2 of 11



# Weekly Nutrient Analysis



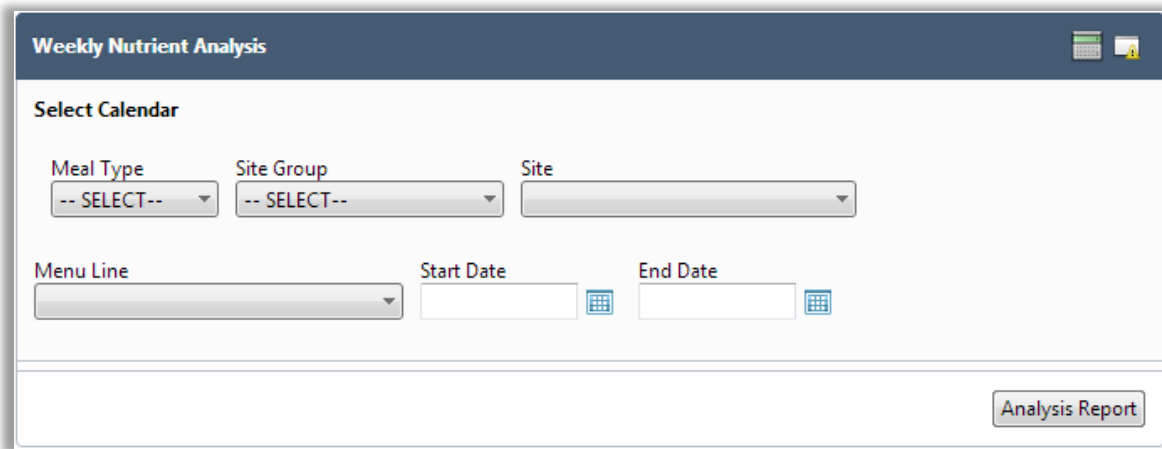
The Weekly Nutrient Analysis report provides:

- Nutrition Report
- Nutrition Summary Report
- Food Component Report

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

After clicking **Analysis Report** the Standard Nutrients footer appears.

## Weekly Nutrient Analysis Page



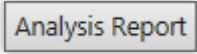
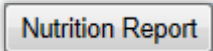
By default on the **Weekly Nutrient Analysis** page:

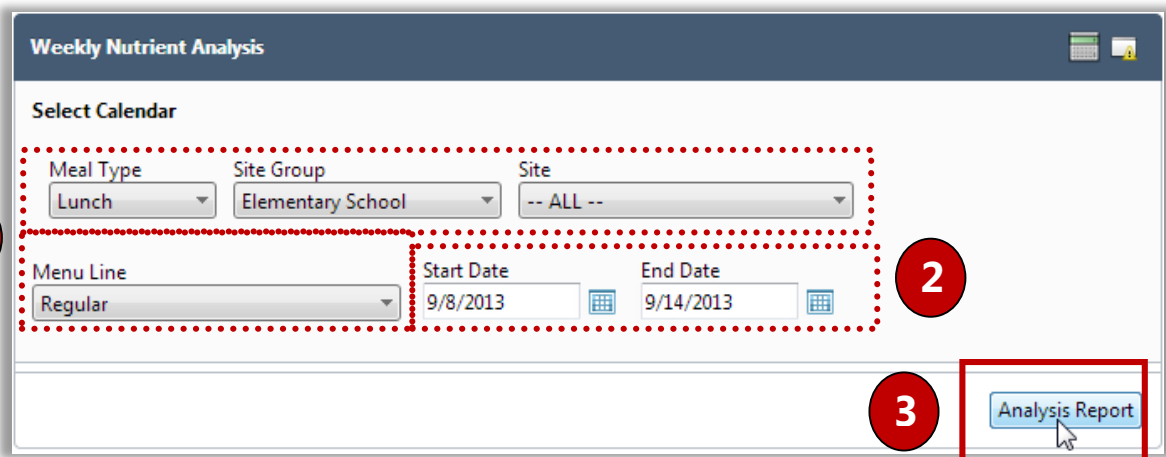
- **Meal Type** and **Site Group** are set to “SELECT”.
- **Site** and **Menu Line** are blank.
- **Start Date** and **End Date** are blank.

## Generating a Weekly Nutrient Analysis Report

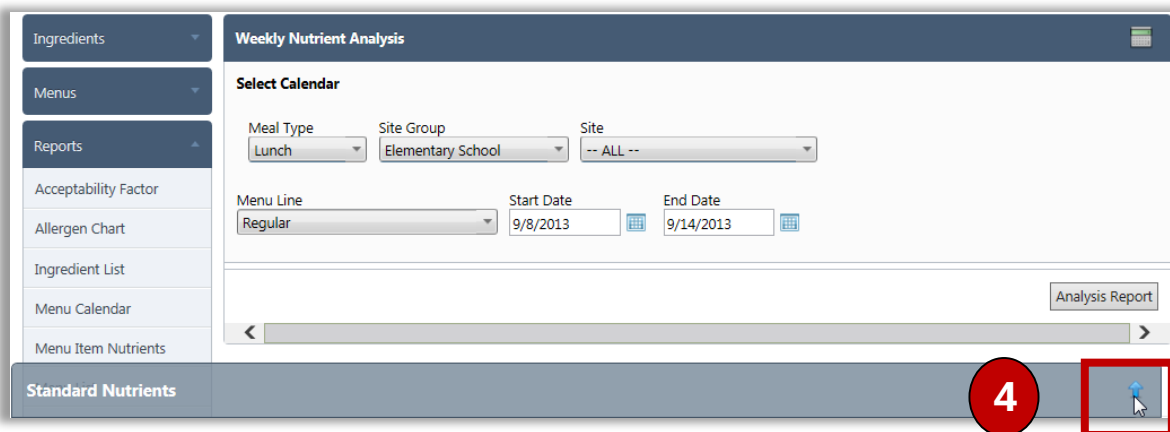
You only need to select a **Start Date** or **End Date**—the other date is automatically calculated for you (seven days after or before the selected date, respectively).

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

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



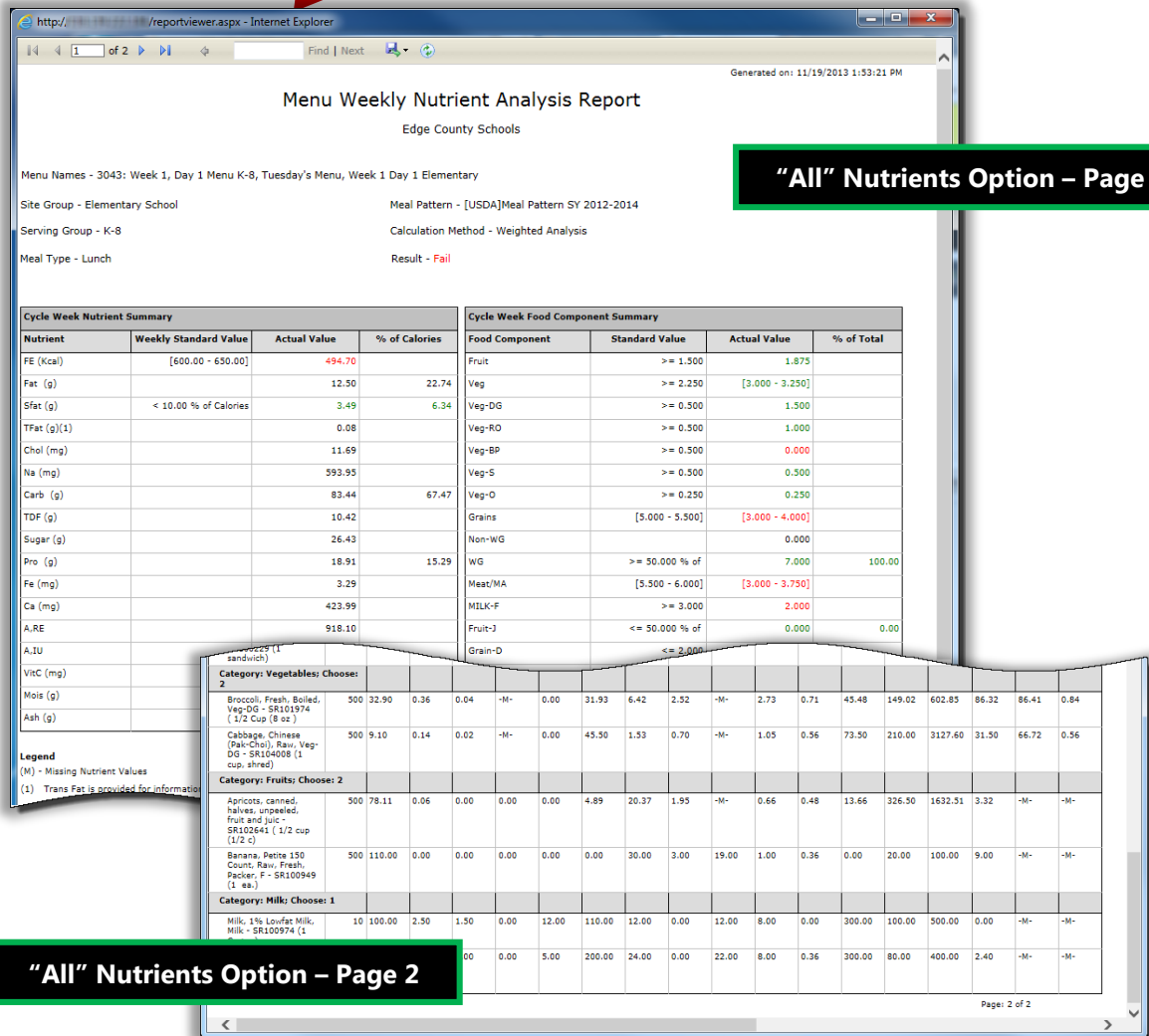
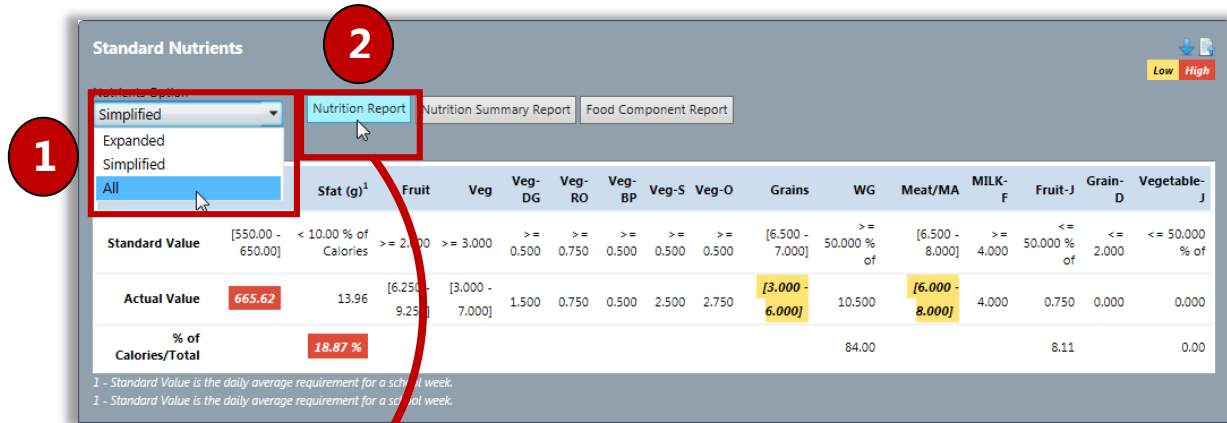
The screenshot shows the 'Weekly Nutrient Analysis' form. A red dotted box labeled '1' encloses the 'Meal Type' (Lunch), 'Site Group' (Elementary School), and 'Menu Line' (Regular) dropdowns. A red circle labeled '2' is next to the 'Start Date' (9/8/2013) and 'End Date' (9/14/2013) fields. A red circle labeled '3' is next to the 'Analysis Report' button.



The screenshot shows the 'Weekly Nutrient Analysis' form with the 'Standard Nutrients' footer expanded. A red circle labeled '4' is next to the 'Analysis Report' button in the footer area.

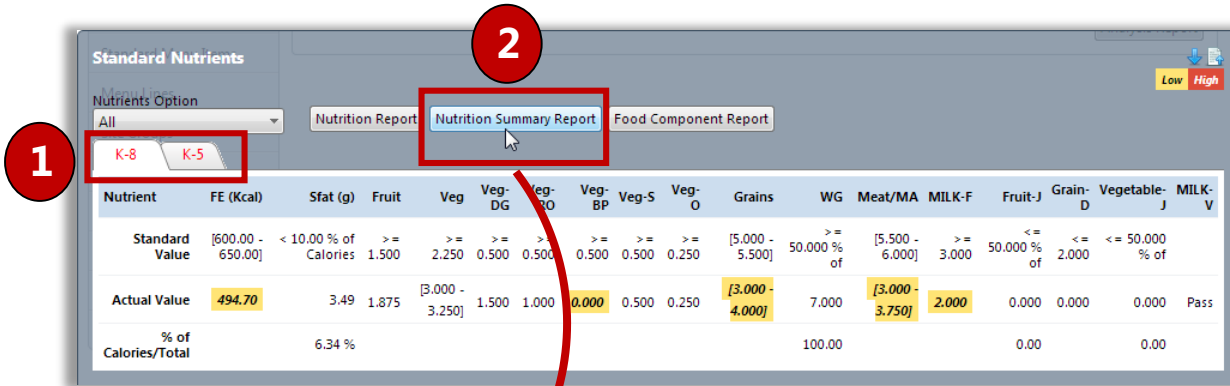
**To generate a Nutrition Report from the Standard Nutrients footer**

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



**To generate a Nutrition Summary Report from the Standard Nutrients footer**

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



http:// /reportviewer.aspx - Internet Explorer

Generated on: 11/19/2013 2:19:53 PM

### Menu Weekly Nutrient Summary Report

Edge County Schools

Menu Names - 3043: Week 1, Day 1 Menu K-8, Tuesday's Menu, Week 1 Day 1 Elementary  
 Site Group - Elementary School Meal Pattern - [USDA]Meal Pattern SY 2012-2014  
 Serving Group - K-8 Calculation Method - Weighted Analysis  
 Meal Type - Lunch

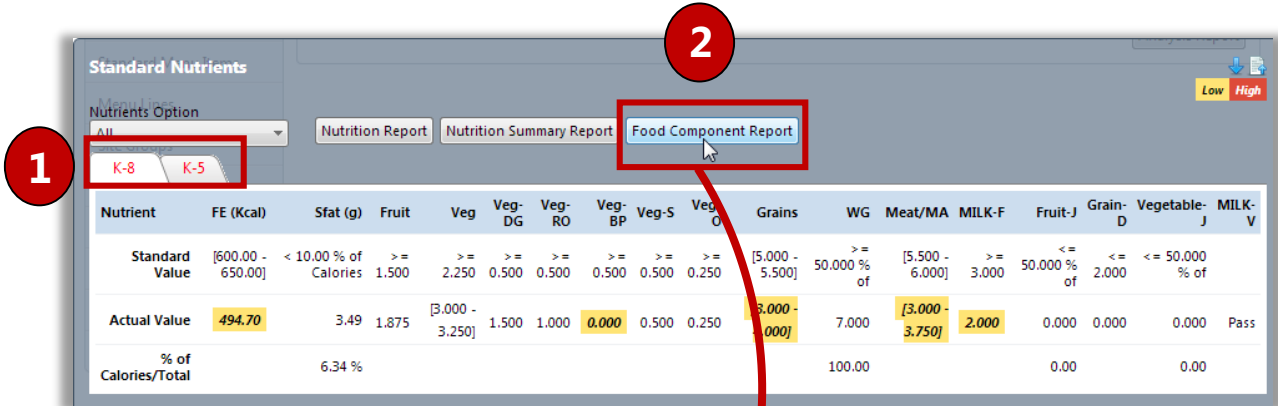
Nutrient	Day 1	Day 2	Week Standard Value	Actual Value	% of Calories
FE (Kcal)	833.53	650.57	[600.00 - 650.00]	494.70	
Fat (g)	25.68 (27.72%)	11.82 (16.33%)		12.50	22.74%
Sfat (g)	6.31 (6.82%)	4.14 (5.73%)	< 10.00 % of Calories	3.49	6.34%
TFat (g)(1)	0.25	0.00		0.08	
Chol (mg)	8.89	26.18		11.69	
Na (mg)	958.11	823.73		593.95	
Carb (g)	133.02 (63.83%)	117.30 (72.12%)		83.44	67.47%
TDF (g)	16.44	14.80		10.42	
Sugar (g)	35.49	43.80		26.43	
Pro (g)	28.15 (13.51%)	28.58 (17.57%)		18.91	15.29%
Fe (mg)	4.22	5.65		3.29	
Ca (mg)	671.61	600.35		423.99	
A.RE	1910.43	843.88		918.10	
A.IU	18289.23	6159.33		8,149.52	
VitC (mg)	88.87	134.76		74.54	
Mois (g)	269.36	156.87		142.08	
Ash (g)	0.92	1.68		0.87	

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

Page: 1 of 1

**To generate a Food Component report from the Standard Nutrients footer**

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



Weekly Food Component Report

Menu Names - Salad Lunch, Bar-B-Que Lunch, Salad Lunch, Fiesta Lunch, Salad Lunch  
 Site Group - Elementary School Meal Pattern - [USDA]Meal Pattern SY 2012-2014  
 Serving Group - K-5 Meal Type - Lunch

Fruit (cups)	Day 1	Day 2	Day 3	Day 4	Day 5	Weekly Total	Weekly Requirement	Weekly Requirement Check
Minimum Fruits (cups)	[2,000 - 2,500] (Pass)	2,500 (Pass)	[2,000 - 2,500] (Pass)	[1,500 - 2,000] (Pass)	[2,000 - 2,500] (Pass)	[10,000 - 12,000]	≥ 2,500	Pass
Weekly Fruit Juice Limit Requirement	Total Weekly Fruit		Total Weekly Fruit Juice		Percent of Total Weekly Fruit that is Juice		Weekly Requirement Check	
≤ 50,000 % of	12,000		1,000		8.333%		Pass	
Vegetables (cups)	Day 1	Day 2	Day 3	Day 4	Day 5	Weekly Total	Weekly Requirement	Weekly Requirement Check
Vegetables (cups)	[0,000 - 2,000] (Fail)	0,000 (Fail)	[0,000 - 2,000] (Fail)	[1,250 - 2,500] (Pass)	[0,000 - 2,000] (Fail)	[1,250 - 8,500]	≥ 3,750	Fail
Dark Green	1,000	0,000	1,000	0,250	1,000	3,250	≥ 0,500	Pass
Red/Orange	0,250	0,000	0,250	0,250	0,250	1,000	≥ 0,750	Pass
Beans/Peas (Legumes)	0,000	0,000	0,000	0,500	0,000	0,500	≥ 0,500	Pass
Starchy	0,500	0,000	0,500	1,000	0,500	2,500	≥ 0,500	Pass
Other	0,250	0,000	0,250	1,250	0,250	2,000	≥ 0,500	Pass
Weekly Vegetable Juice Limit Requirement	Total Weekly Vegetables		Total Weekly Vegetable Juice		Percent of Total Weekly Vegetables that is Juice		Weekly Requirement Check	
≤ 50,000 % of	8,500		0,000		0.000%		Pass	
Meat / Meat Alternates (oz equivalents)	Day 1	Day 2	Day 3	Day 4	Day 5	Weekly Total	Weekly Requirement	Weekly Requirement Check
Meat/Meat Alternates (oz eq)	2,000 (Pass)	[2,000 - 2,500] (Pass)	2,000 (Pass)	[0,500 - 2,000] (Fail)	2,000 (Pass)	[8,500 - 10,500]	[8,000 - 10,000]	Fail
Grains (oz equivalents)	Day 1	Day 2	Day 3	Day 4	Day 5	Weekly Total	Weekly Requirement	Weekly Requirement Check
Grains (oz eq)	0,000 (Fail)	[1,000 - 2,000] (Pass)	0,000 (Fail)	[0,000 - 1,500] (Fail)	0,000 (Fail)	[1,000 - 3,500]	[8,000 - 9,000]	Fail
Weekly Whole Grain Rich	Weekly Grains Total	Weekly Whole Grain Rich Total	Percent of Whole Grain Rich	At Least Half Whole Grain Rich	Grain Based Dessert Total for All Weekly Meals	No More Than 2oz Equivalents of Grain Based Desserts		
≥ 50,000 % of	7,500	3,500	73.333%	Pass	0,000	Pass		
Milk (cups)	Day 1	Day 2	Day 3	Day 4	Day 5	Weekly Total	Weekly Requirement	Weekly Requirement Check
Minimum Fluid Milk (cups)	1,000 (Pass)	2,000 (Pass)	1,000 (Pass)	1,000 (Pass)	1,000 (Pass)	6,000	≥ 5,000	Pass
Skim/fat-free, unflavored; Skim/fat-free, flavored; Low-fat (1% or less), unflavored	Fail	Fail	Fail	Fail	Fail			
Low-fat (1% or less), flavored								
Reduced fat (2% fat) or whole, unflavored and flavored								

◀ *End of Section* ▶

# 5 Configuration

In this chapter you will learn how to:

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

## Configuration at a Glance

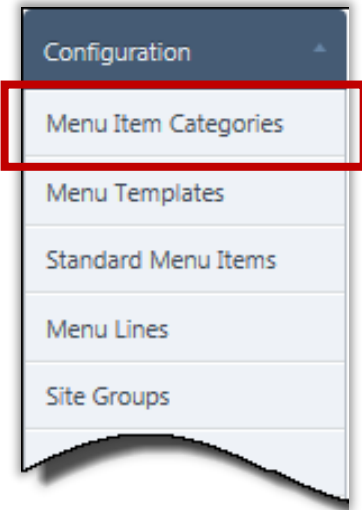
Menu Function	Description
Menu Item Categories	Create and update categories for Menu Items.
Menu Templates	Create and manage templates for Menus.
Standard Menu Items	Create and remove menu items from the Standard Menu Item list – items that are frequently included on Menus.
Menu Lines	Create and update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

### Note

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



# Menu Item Categories



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

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

## Menu Item Categories Page

**Menu Item Categories**

Add New Menu Item Category

Data Source: Local | Category Description: | Display Order: | Add

Description	Display Order	Data Source	Edit
SC - Bkfst Entree		Local	[Edit]
SC - Fruit		Local	[Edit]
SC - Lunch Entree		Local	[Edit]
SC - Meals	8	State Level	[Edit]
SC - Milk		Local	[Edit]
SC - Non Reimbursable	7	State Level	[Edit]
SC - Salad		Local	[Edit]
SC - Veg - Green	7	Local	[Edit]
SC - Veg-O	6	Local	[Edit]
SC - Whole Grains	9	State Level	[Edit]


Page size: 10 | 18 items in 2 pages

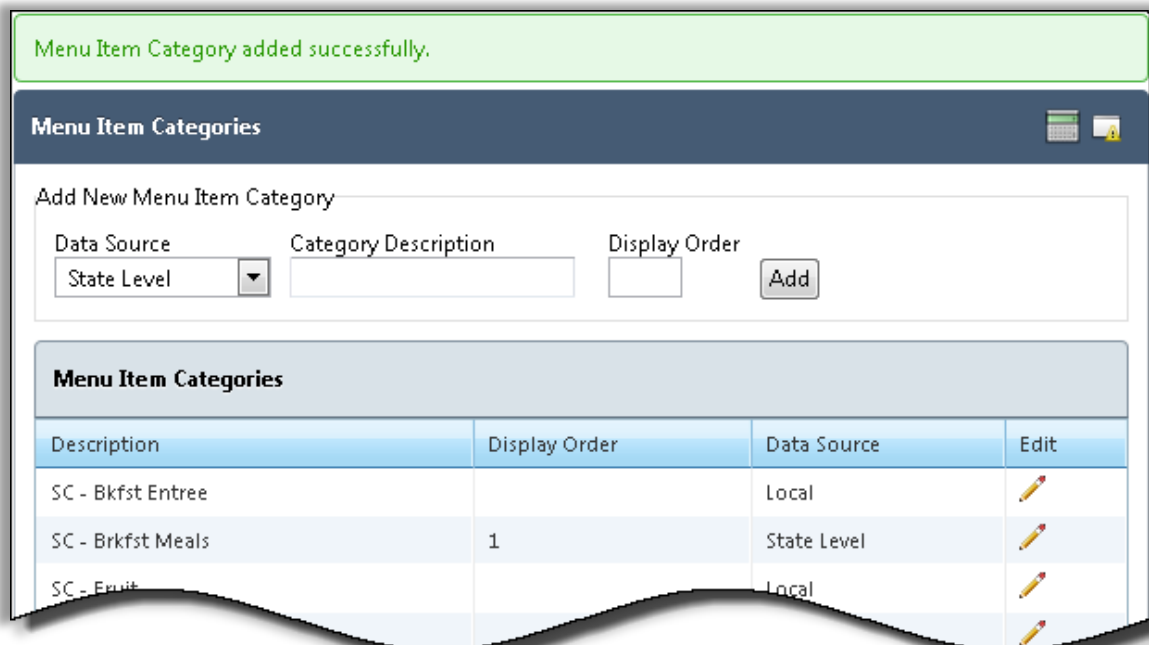
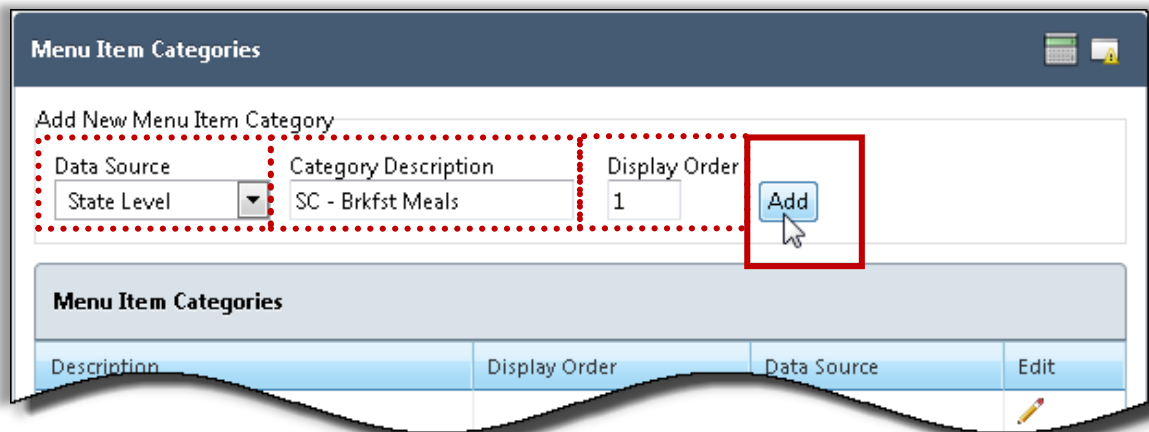
By default on the **Menu Items Categories** page:

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

## Adding a Menu Item Category



### To add a new Menu Item category

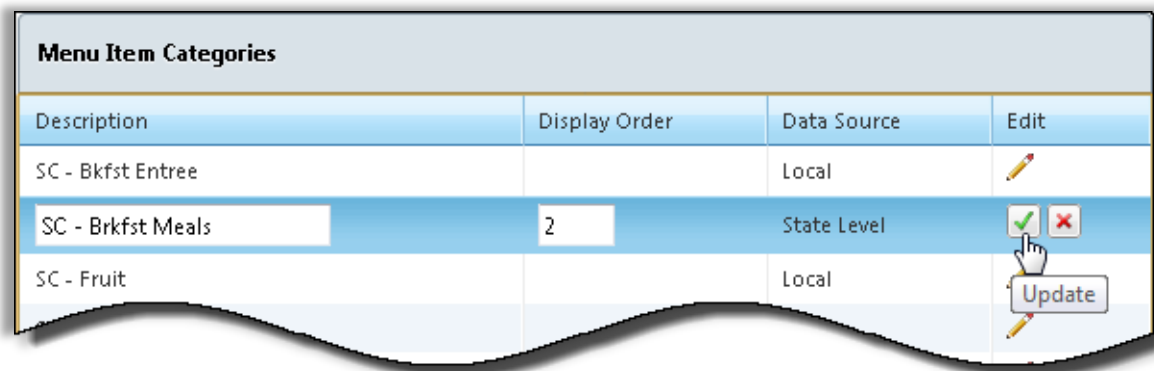
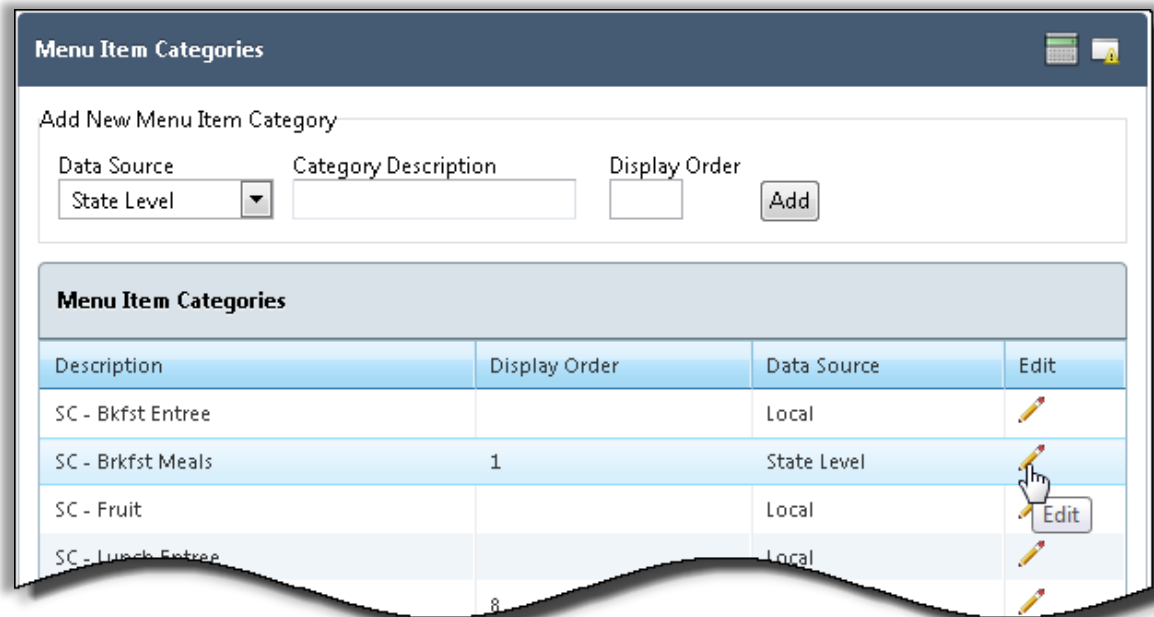
1. Select a **Data Source**, if needed.
2. Enter a brief name or description for the new category in **Category Description**.
3. Enter a number in **Display Order** to represent the placement of the new category in drop-down lists on various **Production** module pages.
4. Click  .



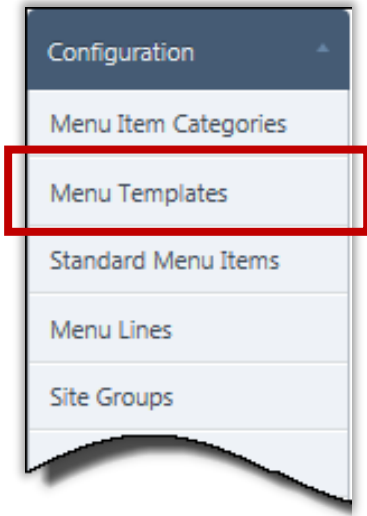
## Updating Category Details

### To update Menu Item Category details

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

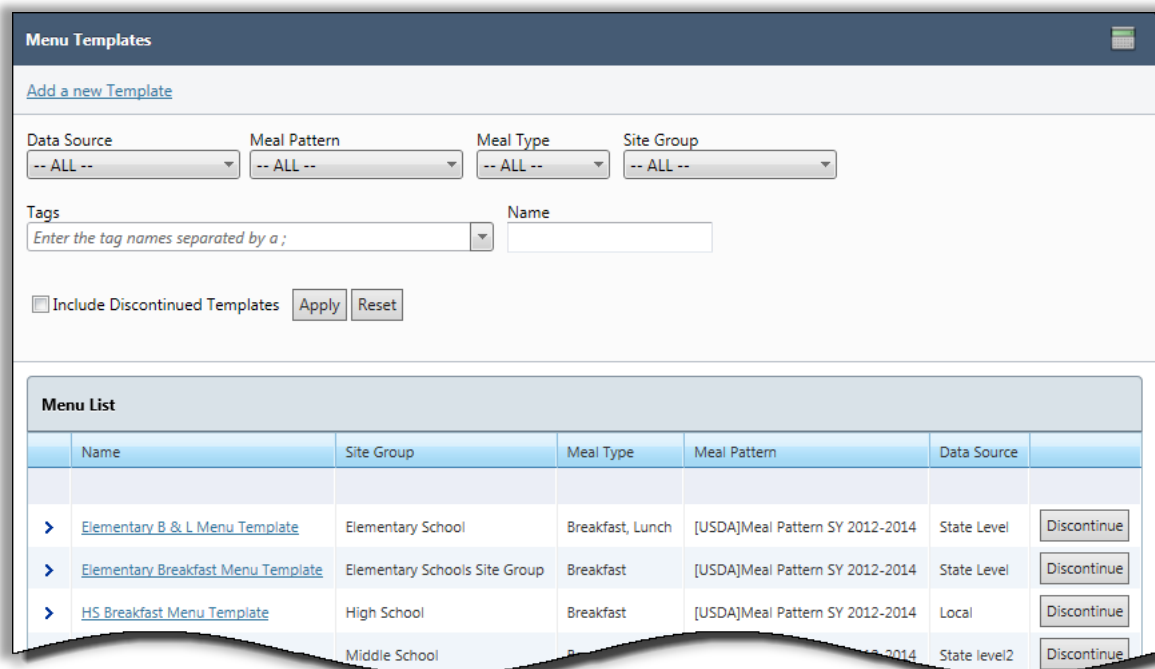


# Menu Templates



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

## Menu Templates Page




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

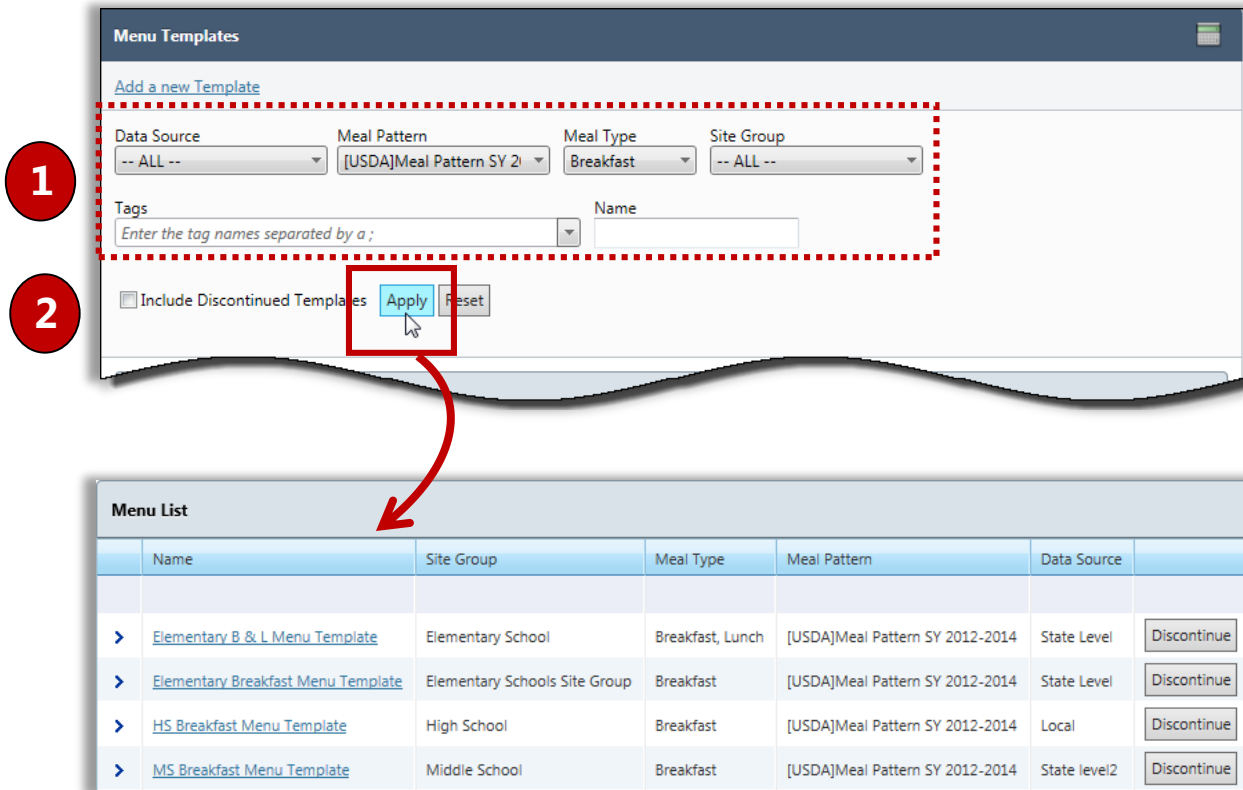
- **Meal Pattern, Meal Type, and Site Group** are set to “ALL”.
- **Tags and Name** are blank (empty).
- **Include Discontinued Templates** is cleared.

## Searching for a Menu Template

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

### To search for a Menu Template

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



**Menu Templates**

[Add a new Template](#)

: -- ALL --   
 : [USDA]Meal Pattern SY 2   
 : Breakfast   
 : -- ALL --

: Enter the tag names separated by a ;   
 :

Include Discontinued Templates   
    

**Menu List**

	Name	Site Group	Meal Type	Meal Pattern	Data Source	
>	<a href="#">Elementary B &amp; L Menu Template</a>	Elementary School	Breakfast, Lunch	[USDA]Meal Pattern SY 2012-2014	State Level	<input type="button" value="Discontinue"/>
>	<a href="#">Elementary Breakfast Menu Template</a>	Elementary Schools Site Group	Breakfast	[USDA]Meal Pattern SY 2012-2014	State Level	<input type="button" value="Discontinue"/>
>	<a href="#">HS Breakfast Menu Template</a>	High School	Breakfast	[USDA]Meal Pattern SY 2012-2014	Local	<input type="button" value="Discontinue"/>
>	<a href="#">MS Breakfast Menu Template</a>	Middle School	Breakfast	[USDA]Meal Pattern SY 2012-2014	State level2	<input type="button" value="Discontinue"/>

## Adding a Menu Template

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

### To add a Menu Template

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

The image shows two screenshots from the PrimeroEdge software interface. The top screenshot, titled "Menu Templates", shows a list of templates with a red box around the "Add a new Template" link, labeled with a red circle containing the number 1. Below this, the "Menu Info" form is shown with several fields highlighted by red dashed boxes and numbered callouts: 2 points to the "Data Source", "Meal Pattern", "Meal Type", and "Site Group" dropdowns; 3 points to the "Menu Description" and "Menu Short Description" text boxes; 4 points to the "Serving Groups" dropdown; 5 points to the "Menu Item Categories" dropdown; and 6 points to the "Save" button in the top right corner of the form.

**Menu Template October Menu** Copy Save

Data Source: Local Meal Pattern: [USDA]Meal Pattern SY 2 Meal Type: Breakfast Site Group: Middle School

Menu Description: October Menu Template **7** Tags: Enter the name of the tag or select from this

Status:  Is Active

Menu Short Description: October Menu

Nutrition Analysis Method: Weighted Analysis

Projected Servings Count as a Percentage:

Menu Item Categories: SC - Brkfst Meals, SC - Fruit, SC - Milk Serving Groups: 9-12

Menu Costing: **8** Add Standard Menu Items Generate Report

**Menu Items** Add Menu Items

Menu Item	Meal Contribution	9-12 (550)	Edit	Delete
Category: SC				
Category: SC				
Category: SC				

**PrimeroEdge - Add Menu Item to Menu** Add

Category	Menu Item (Recipe Code)	Serving Size	Meal Contribution	Allergens	Data Source
SC - Bkfst					
<input type="checkbox"/>	SC - Bkfst Entree	3.6 oz Precooked Breaded Fish Portions (LR300035)	3 5/8 Ounce		Local
<input type="checkbox"/>	SC - Bkfst Entree	Bagel Half; Bake Crafters, Individually Wrapped; as served (LR300043)	1 piece	2 WG	Local
<input type="checkbox"/>	SC - Bkfst Entree	Bagel, 100% Whl Wheat, sliced, Fzn, Cooked (LR300049)	1 piece		Local
<input checked="" type="checkbox"/>	SC - Bkfst Entree	Bagel, Blueberry Swirl, Sliced, Fzn, Cooked (LR300047)	1 piece		Local
<input type="checkbox"/>	SC - Bkfst Entree	Bagel, Cinn Raisin, sliced, fzn, cooked (LR300048)	1 piece		Local
<input type="checkbox"/>	SC - Bkfst Entree	Cereal Bar, Apple Cinnamon; Bake Crafters, Individually Wrapped; as served (LR300044)	1 piece		Local
<input checked="" type="checkbox"/>	SC - Bkfst Entree	Cereal, Kashi Hot Cereal, Heart to Heart Instant Oatmeal, Raisin Spice,	1 Package	2 WG	Local

Page size: 100 8 items in 1 pages

**Menu Template October Menu** Copy Save **9**

Data Source: Local Meal Pattern: [USDA]Meal Pattern SY 2 Meal Type: Breakfast Site Group: Middle School

## Updating a Menu Template

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

### To update a Menu Template

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

**Menu List**

Name	Site Group	Meal Type	Meal Pattern	Data Source	
> September Menu	High School	Breakfast	[USDA]Meal Pattern SY 2012-2014	Local	<input type="button" value="Discontinue"/>

**Menu Template September Menu**

Data Source: WOOD Local | Meal Pattern: [USDA]Meal Pattern SY 2 | Meal Type: Breakfast | Site Group: High School

Menu Description: September Menu

Status:  Is Active

Menu Short Description: September Menu

Nutrition Analysis Method: Weighted Analysis

Projected Servings Count as a Percentage:

Menu Item Categories: SC - Brkfst Meals, SC - FRUIT, SC - MILK | Serving Groups: 9-12

Menu Costing:

**Menu Items**


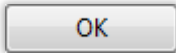
Menu Item	Meal Contribution	9-12 (100)	Edit	Delete
Category: SC - MILK; Choose: 1				
MILK	1 MILK-F	200 200%	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>

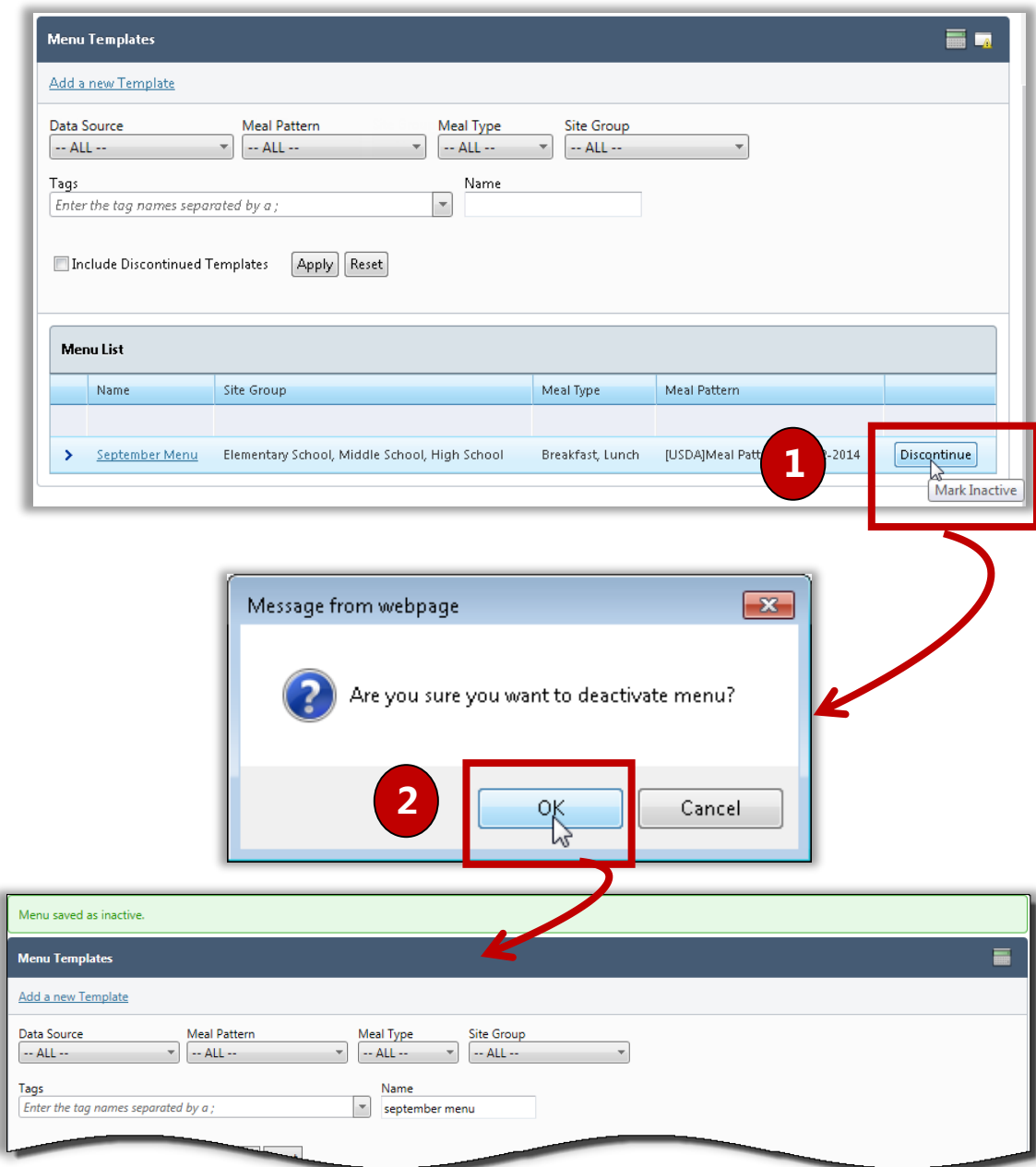


## Discontinuing a Menu Template

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

### To discontinue a Menu Template

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



## Activate a Discontinued Menu Template

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

### To activate a discontinued Menu Template

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

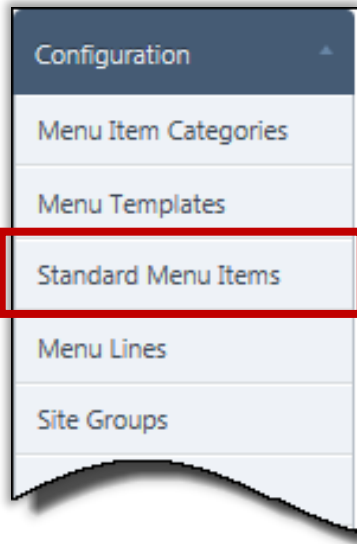
The screenshot illustrates the process of activating a discontinued menu template in the PrimeroEdge system. It is divided into four numbered steps:

- Step 1:** A red dashed box highlights the **Include Discontinued Templates** checkbox, which is checked. A red circle with the number '1' is placed to the left of this box.
- Step 2:** A red box highlights the **Apply** button next to the checkbox. A red circle with the number '2' is placed above the box.
- Step 3:** A red box highlights the **Activate** button in the **Menu List** table. A red circle with the number '3' is placed to the right of the box. The table below shows a single entry: 

Name	Site Group	Meal Type	Meal Pattern	Status
September Menu	Elementary School, Middle School, High School	Breakfast, Lunch	[USDA]Meal Pattern SY 2012-2014	
- Step 4:** A red box highlights the **OK** button in a confirmation dialog box titled "Message from webpage" with the question "Are you sure you want to activate menu?". A red circle with the number '4' is placed to the left of the box.

Below the confirmation dialog, a green banner displays the message "Menu saved as active." The final screenshot shows the **Menu Templates** interface with the **Include Discontinued Templates** checkbox still checked.

# Standard Menu Items



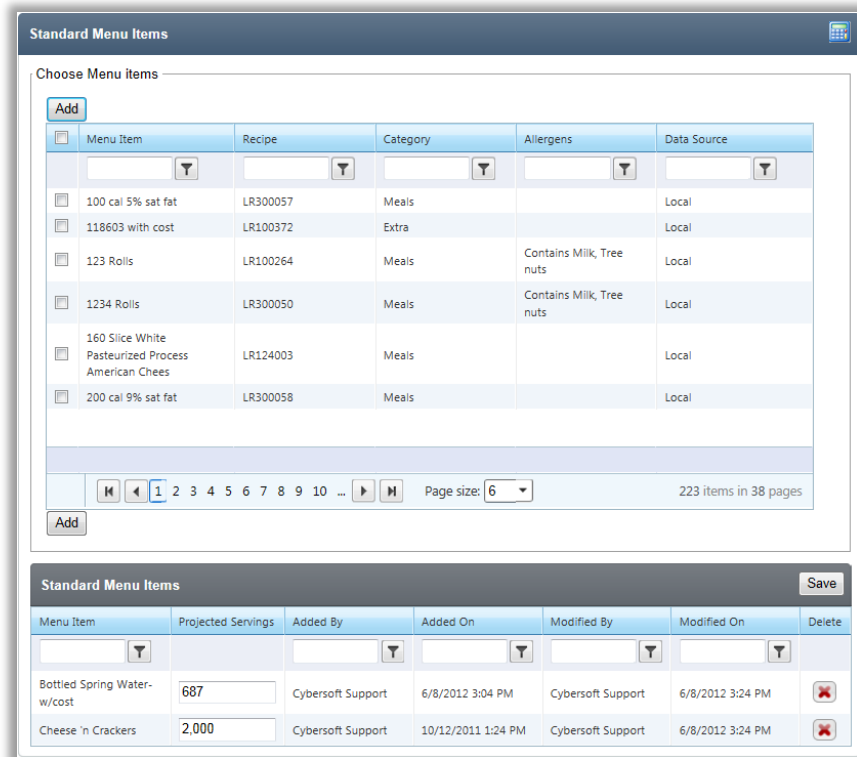
**Standard Menu Items** are those items that are included on many or all Menus, such as milk, fruit, bread, etc. This menu function maintains the list of menu items that are added to a Menu when

**Add Standard MenuItems** is clicked on the **Menu Info** page.

Adding Standard Menu Items eliminates adding each Menu Item one at a time making the Menu Planner’s job quicker and easier.

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

## Standard Menu Items Page



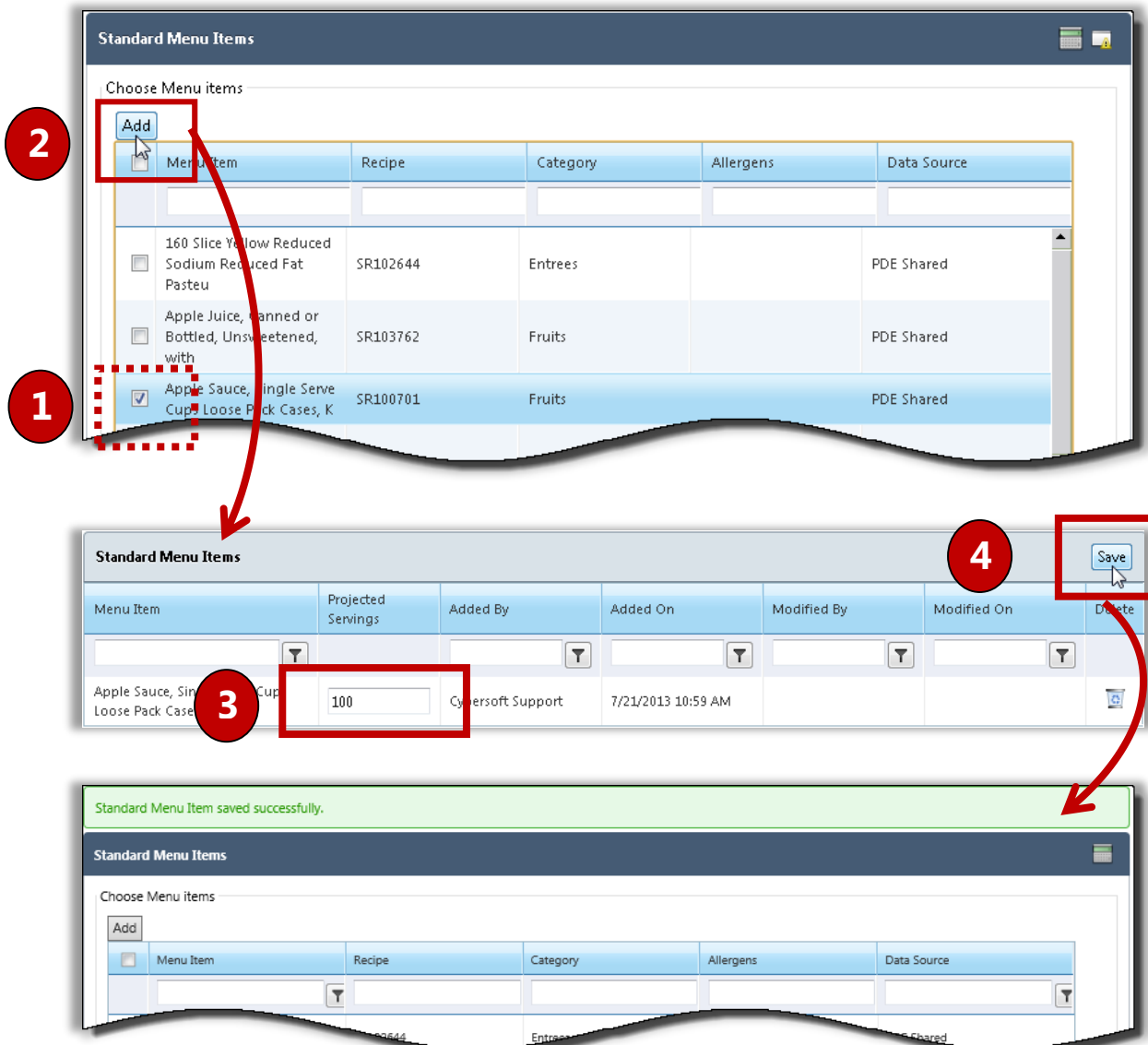
By default on the **Standard Menu Items** page:

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

## Adding a Standard Menu Item


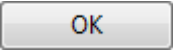
### To add a Standard Menu Item

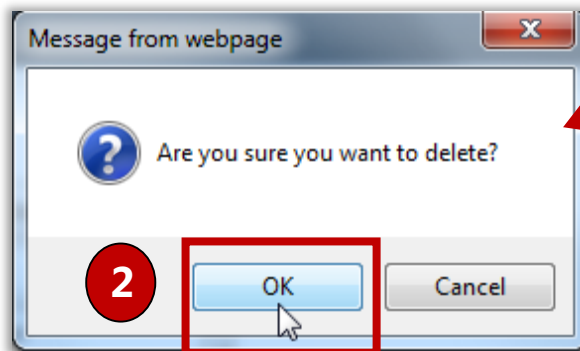
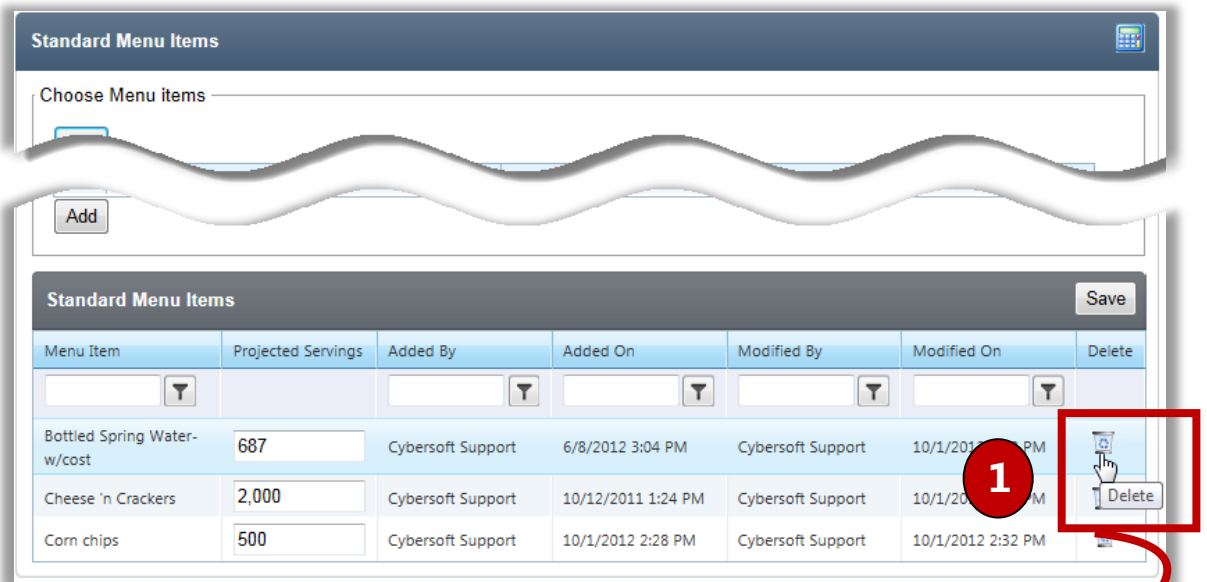
1. Select one or more items in the **Choose Menu Items** list; use the filters in each column to narrow the display of menu items.
2. Click  .
3. Enter the Projected Serving Counts for each added Menu Item.
4. Click  .



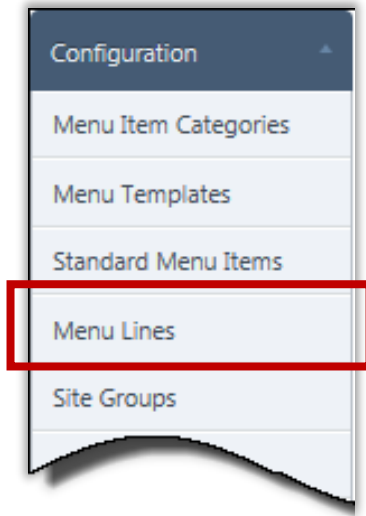
## Deleting a Standard Menu Item

### To remove a Standard Menu Item

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



## Menu Lines



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

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

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

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

### Menu Lines Page

 A screenshot of the 'Menu Lines' page in a software application. At the top, there is a header 'Menu Lines'. Below it is a section for 'Add New Menu Line' with a text input field for 'Menu Line Description' and an 'Add' button. Below this is a section titled 'Existing Menu Lines' containing a table with two columns: 'Description' and 'Edit'. The table lists several menu line types, each with a pencil icon in the 'Edit' column.
 

Description	Edit
Regular	
Breakfast - In Class	
Salad Bar	
Pizza Bar	
OLE Taco Bar	
Hot Sandwich Bar	
Smoothie Bar	

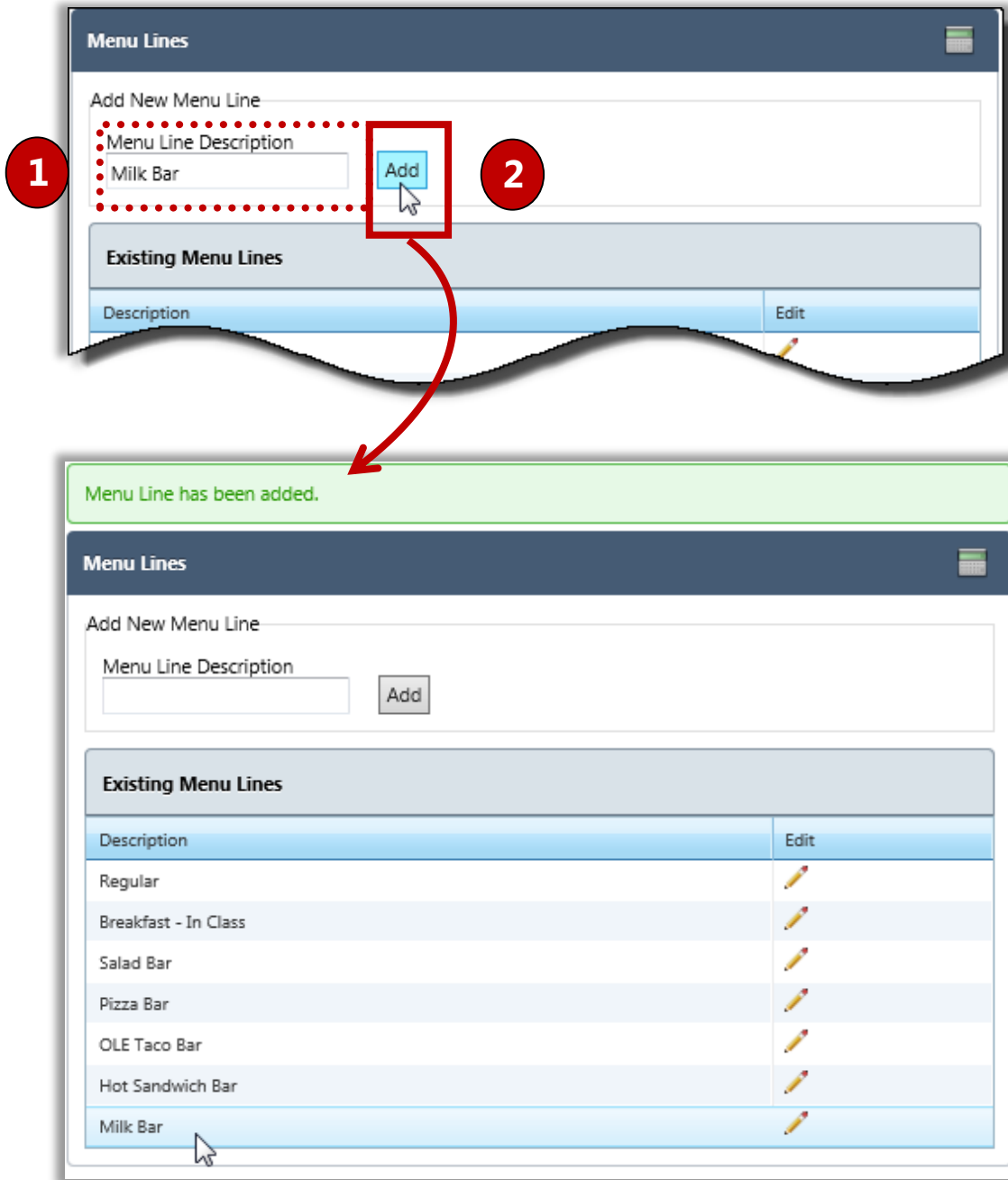
By default on the **Menu Lines** page:

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

## Adding a Menu Line



### To add a Menu Line

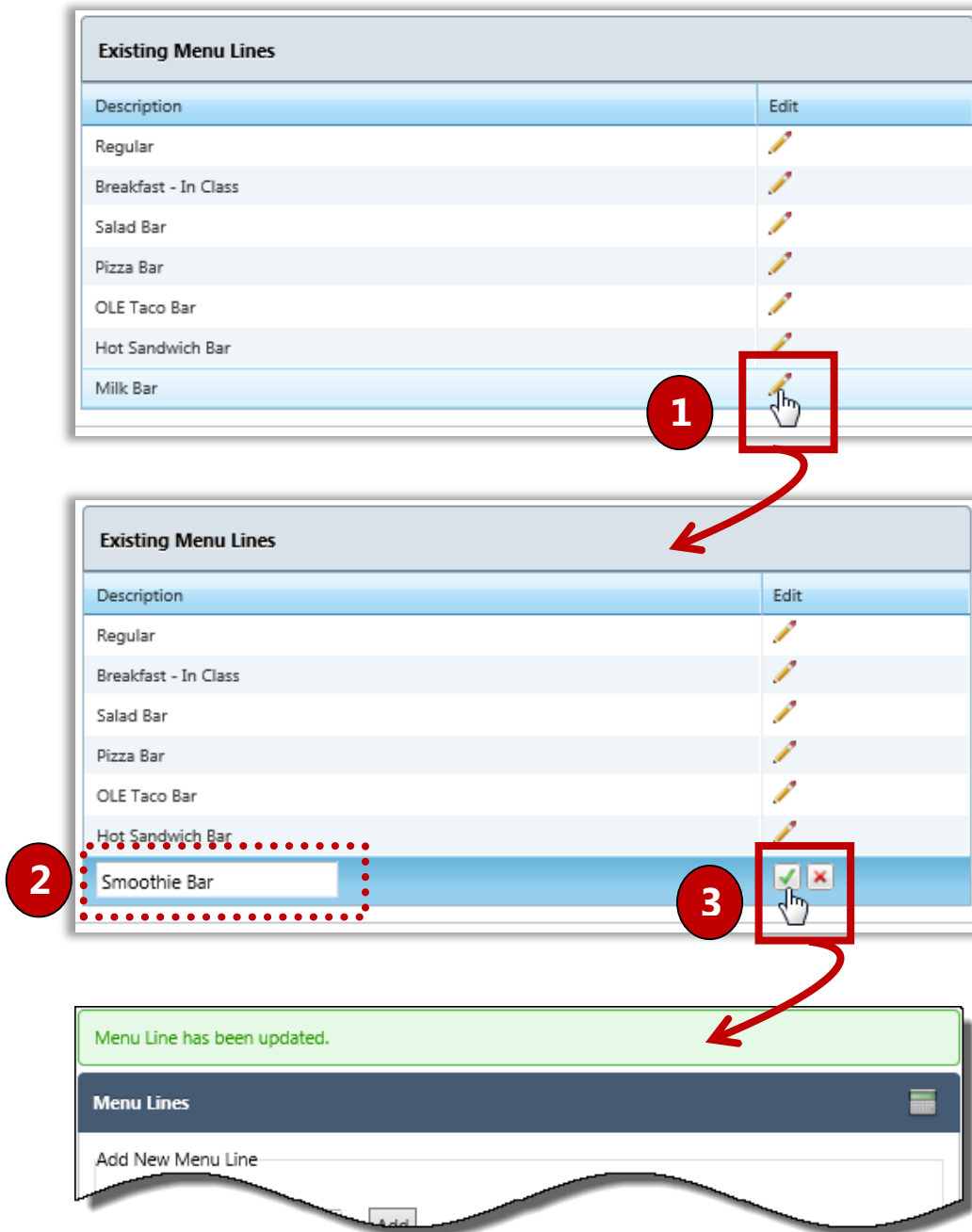
1. Enter a name for the new menu line in **Menu Line Description**.
2. Click  .



## Updating a Menu Line Description

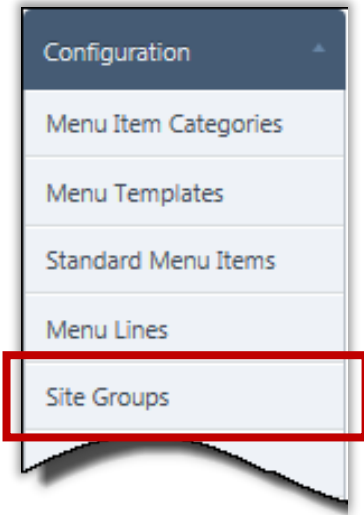
### To update a Menu Line description

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






# Site Groups

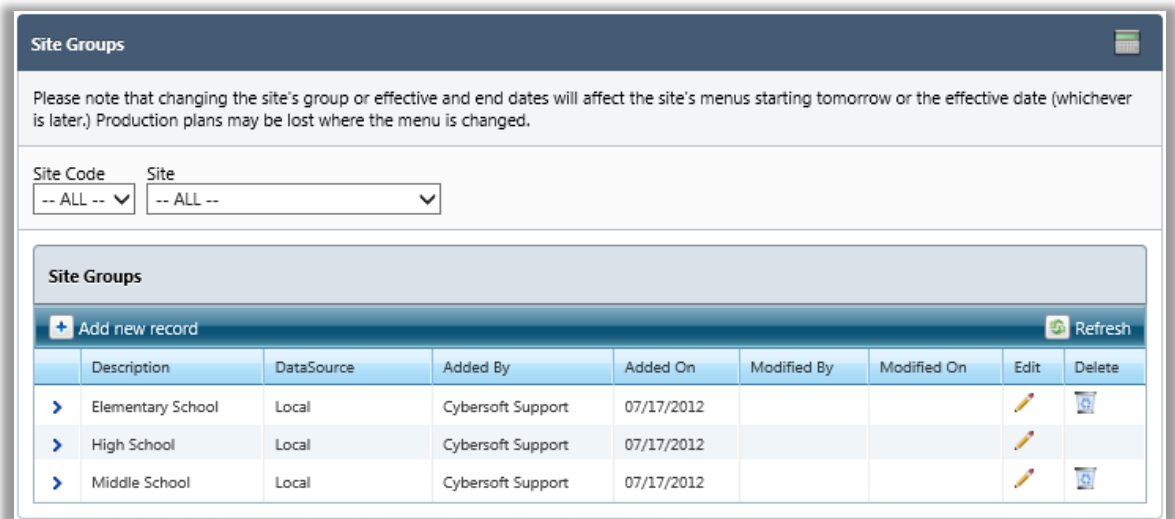


**Site Groups** organizes feeding sites into groups to make creating and assigning Menus easier and quicker. Creating a Site Group is as simple as clicking one button to automatically place all sites into a group according to the assigned Site Code. Or, you can create local (custom) groups and individually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

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

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

## Site Groups Page

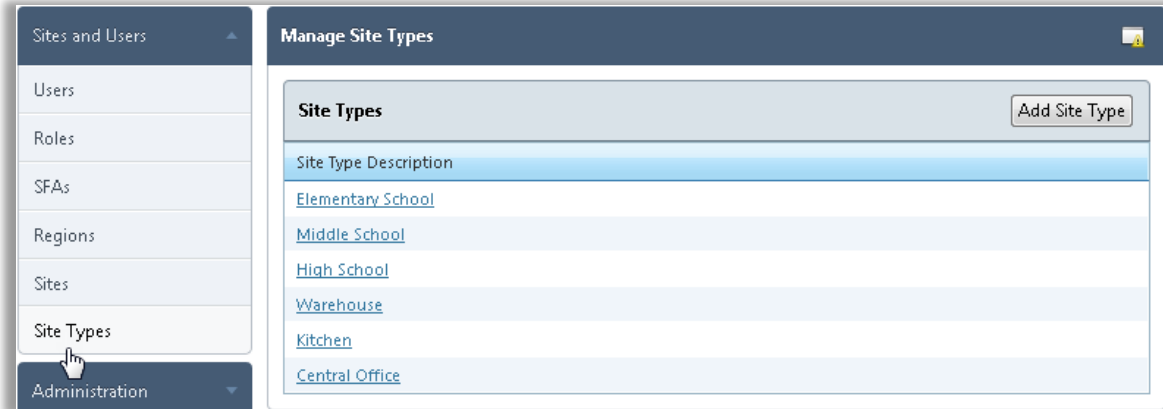


By default on the **Site Groups** page:

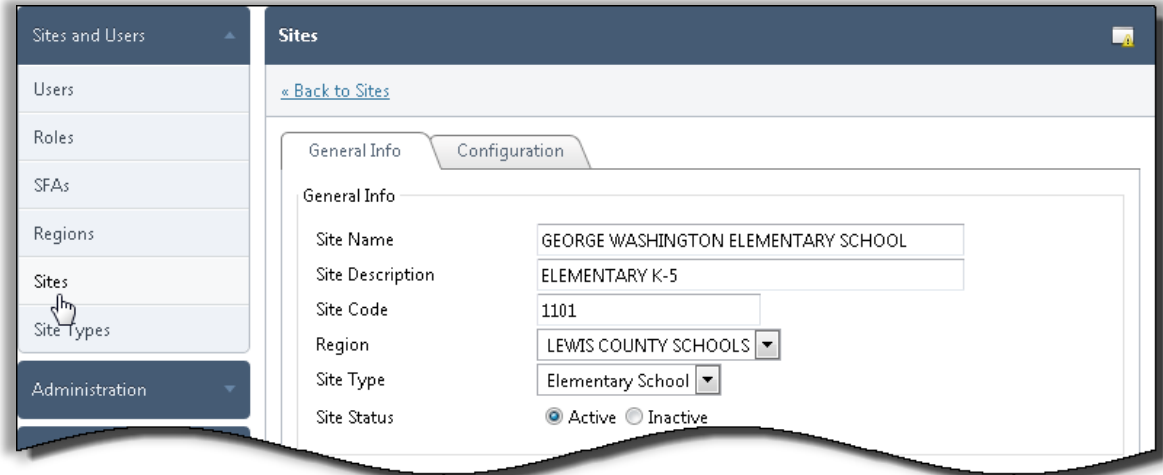
- All existing site groups are listed.
- Site group details are hidden.

## Adding Site Groups by Site Type

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



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



### To create Site Groups for all Site Types

1. Click  .

1

The screenshot shows the 'Site Groups' configuration page. At the top, there is a warning message: "Please note that changing the site's group or effective and end dates will affect the site's menus starting tomorrow or the effective date (whichever is later.) Production plans may be lost where the menu is changed." Below the warning are two dropdown menus for 'Site Code' and 'Site', both set to '-- ALL --'. A red box highlights the 'Add Site types as groups' button, with a red circle containing the number '1' and an arrow pointing to it.

The screenshot shows the 'Site Groups' configuration page after the button click. The 'Add Site types as groups' button is now disabled. Below the filters, a table displays the following data:

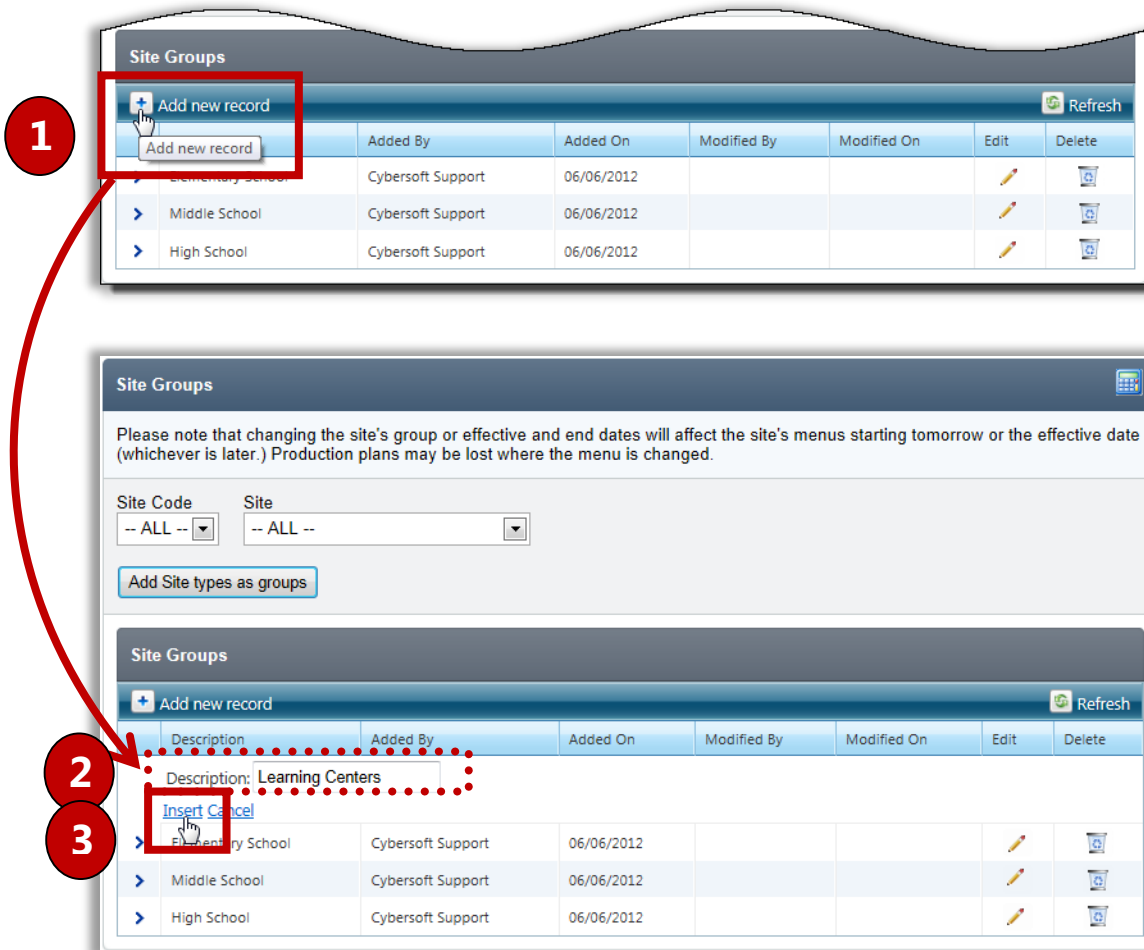
Description	Added By	Added On	Modified By	Modified On	Edit	Delete
> Elementary School	Cybersoft Support	06/06/2012				
> Middle School	Cybersoft Support	06/06/2012				
> High School	Cybersoft Support	06/06/2012				

## Adding a Site Group

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

### To add an individual Site Group

1. Click  .
2. Enter a name for the Site Group in **Description**.
3. Click [Insert](#).



**1**

**2**

**3**

**Site Groups**

+ Add new record Refresh

	Added By	Added On	Modified By	Modified On	Edit	Delete
Elementary School	Cybersoft Support	06/06/2012				
Middle School	Cybersoft Support	06/06/2012				
High School	Cybersoft Support	06/06/2012				

Please note that changing the site's group or effective and end dates will affect the site's menus starting tomorrow or the effective date (whichever is later.) Production plans may be lost where the menu is changed.

Site Code: -- ALL -- Site: -- ALL --

Add Site types as groups

**Site Groups**



+ Add new record Refresh

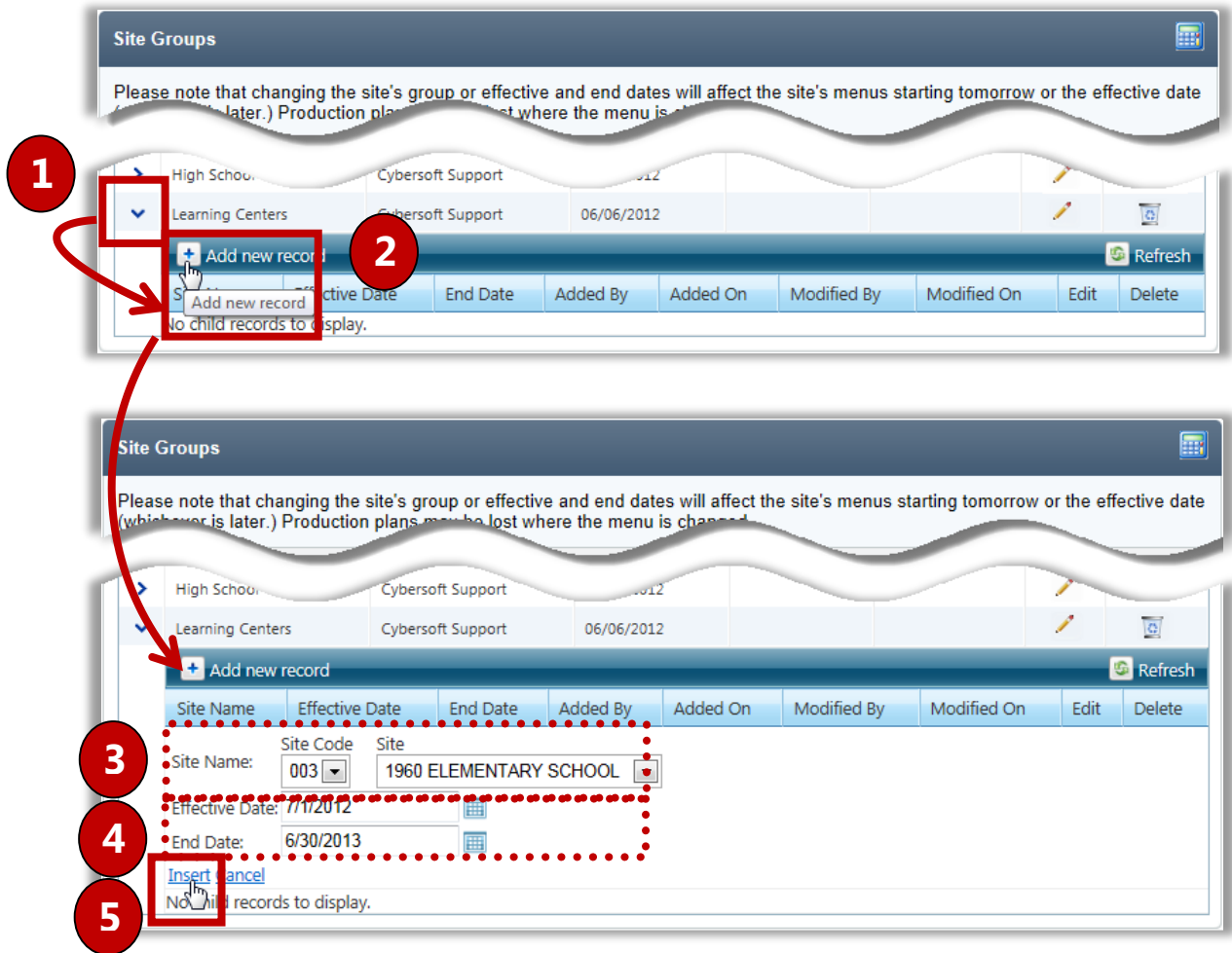
Description	Added By	Added On	Modified By	Modified On	Edit	Delete
Description: Learning Centers						
Elementary School	Cybersoft Support	06/06/2012				
Middle School	Cybersoft Support	06/06/2012				
High School	Cybersoft Support	06/06/2012				

## Adding a Site to a Site Group

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

### To add a Site to a Site Group

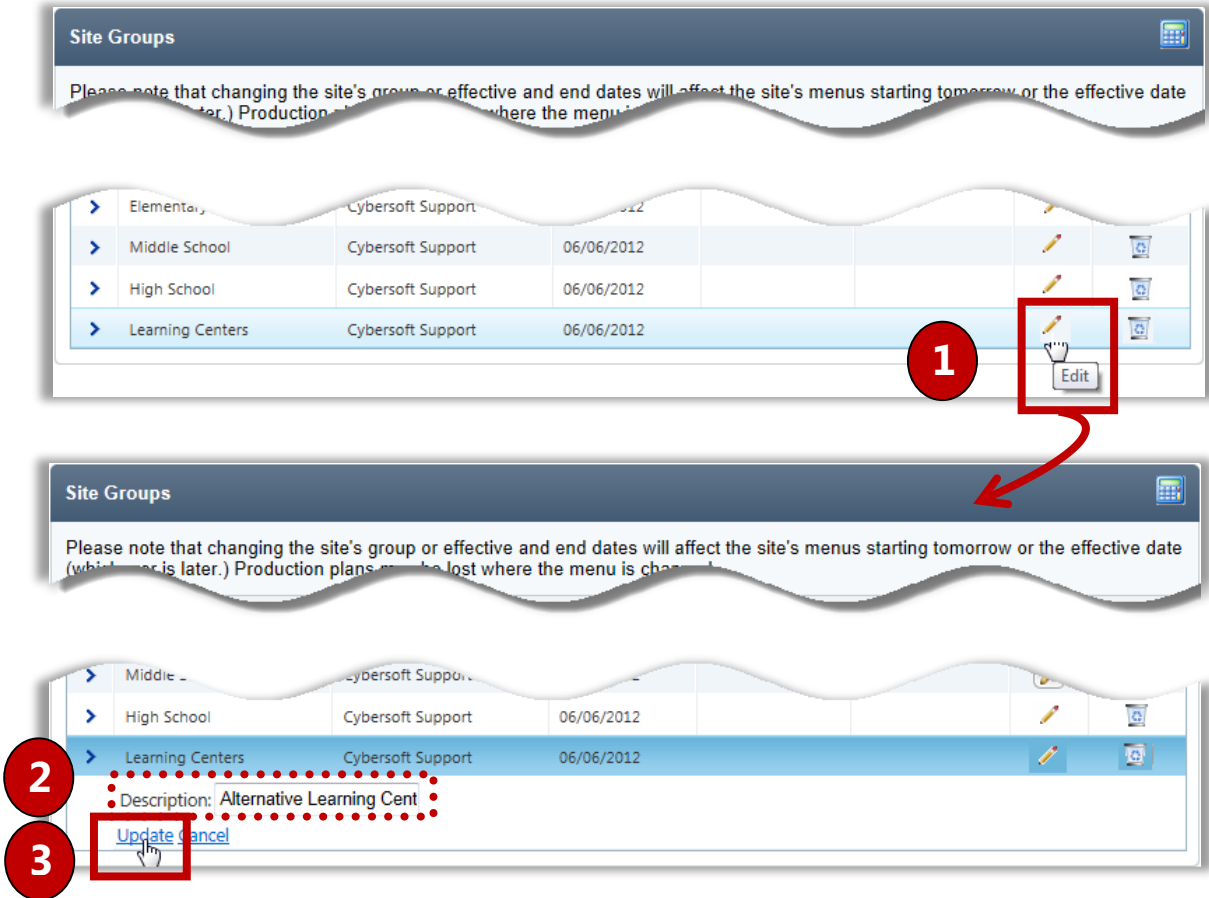
1. Click **Show** (  ) in a Site Group listing.
2. Click  .
3. Select a **Site Code** or **Site**.
4. Enter a service start date in **Effective Date** and a service end date in **End Date**.
5. Click **Insert**.



## Updating Site Group Details

### To update Site Group details



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



## Updating Site Details

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


### To change Site details

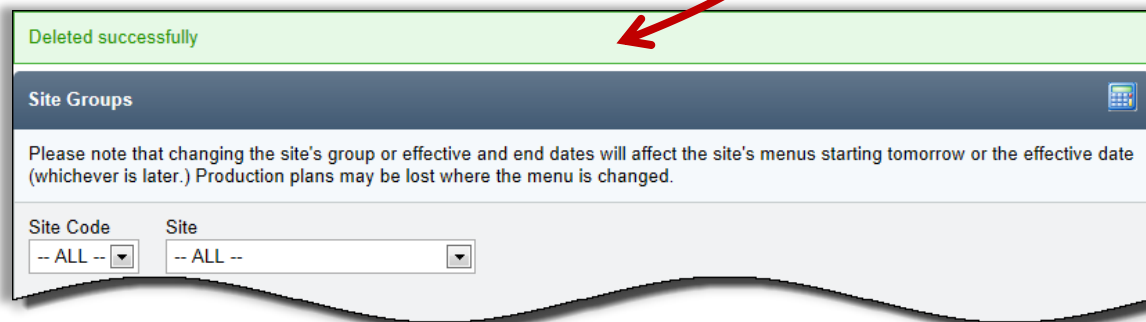
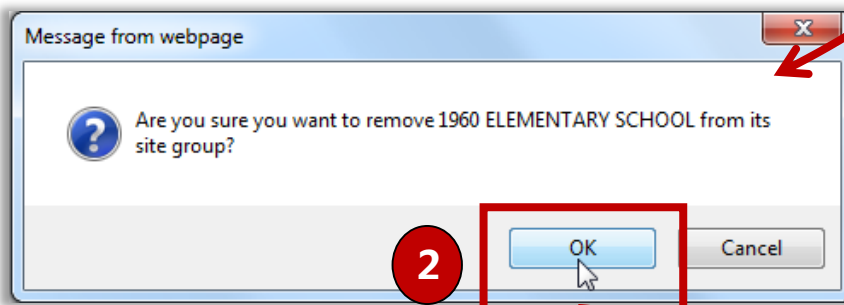
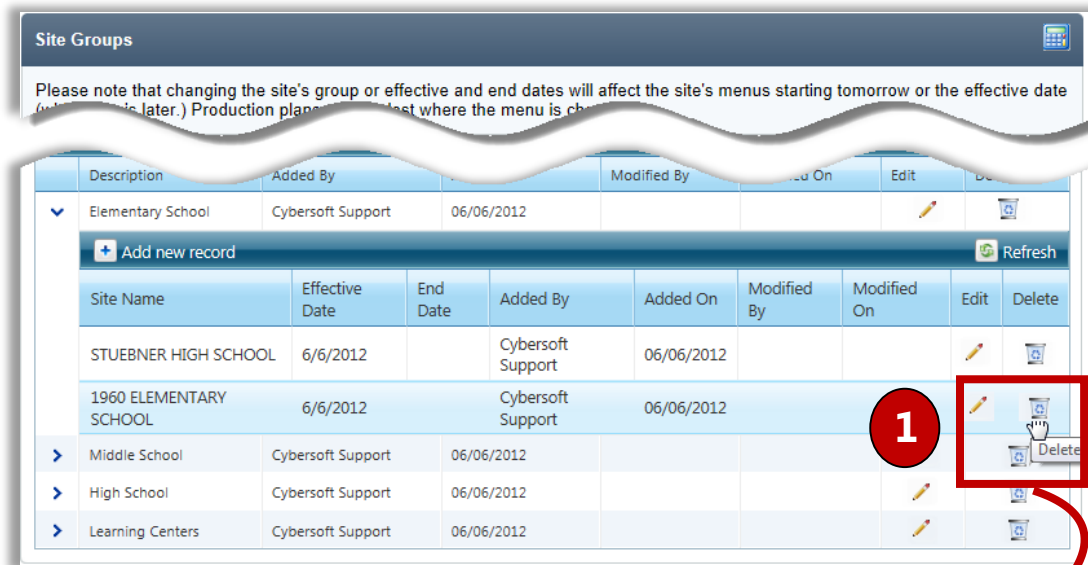
1. Click **Expand** (  ) in a Site Group listing.
2. Click **Edit** (  ) in a Site listing.
3. Enter or select a new **Effective Date** (Start Date) or **End Date**.
4. Click **Update**.

The screenshot shows the 'Site Groups' interface. At the top, there is a warning: "Please note that changing the site's group or effective and end dates will affect the site's menus starting tomorrow or the effective date (whichever is later.) Production plans may be lost where the menu is changed." Below this are filters for 'Site Code' and 'Site', both set to '-- ALL --'. A table lists site groups: Elementary School, Middle School, High School, and Learning Centers. A red circle '1' highlights the expand icon for Learning Centers. Below the table, another table shows details for '1960 ELEMENTARY SCHOOL' with Effective Date '7/1/2012' and End Date '6/30/2013'. A red circle '2' highlights the 'Edit' button. The edit form below shows 'Site Name' as '1960 ELEMENTARY SCHOOL', 'Effective Date' as '7/1/2012', and 'End Date' as '6/28/2013'. A red circle '3' highlights the date fields, and a red circle '4' highlights the 'Update' button.

## Deleting a Site in a Site Group

### To delete a Site from a Site Group

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


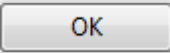


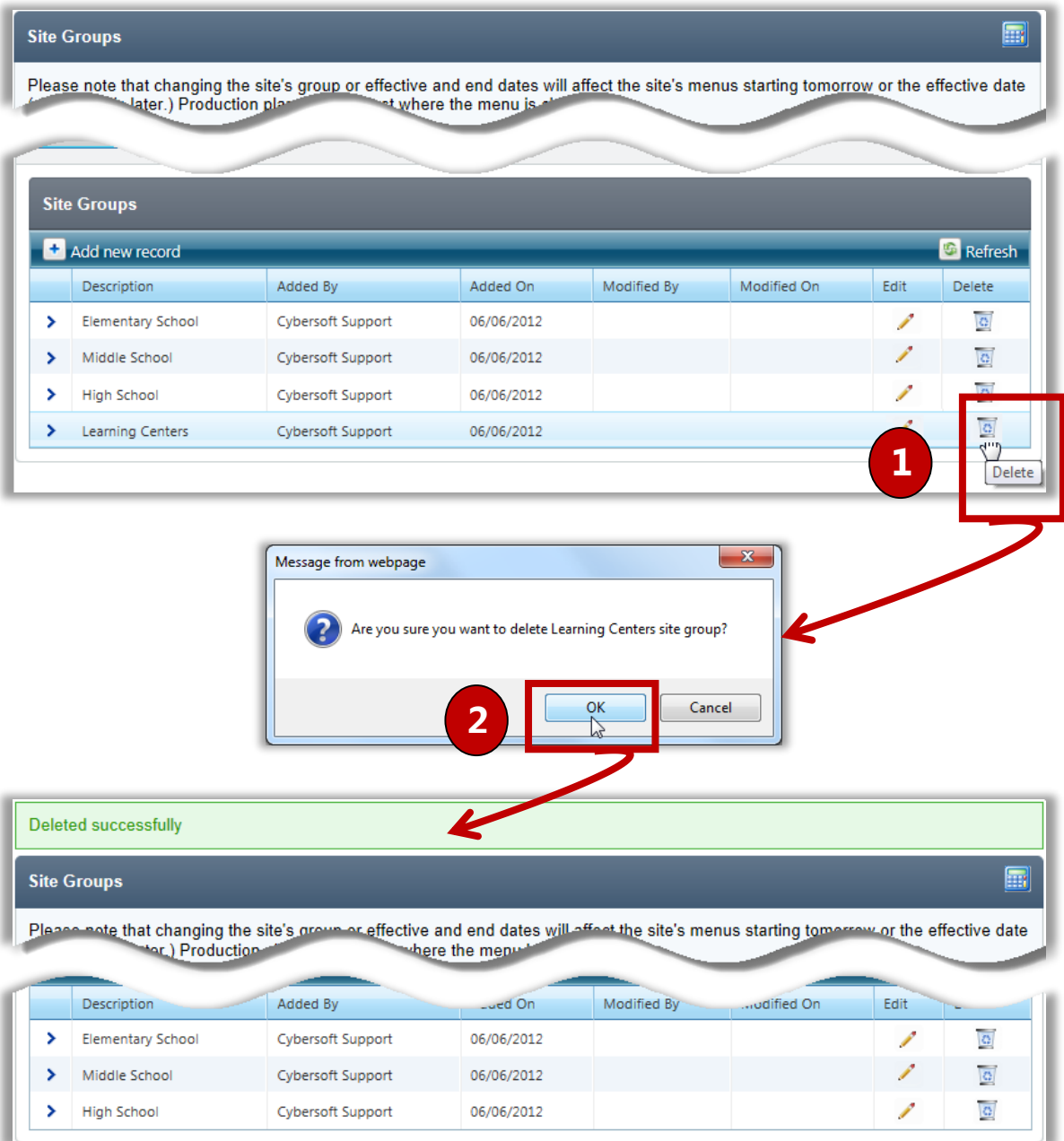


## Deleting a Site Group

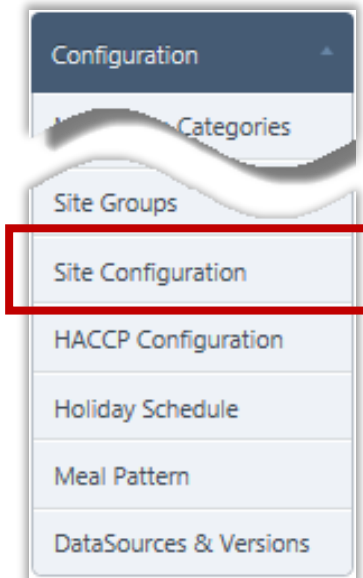
A Site Group can be removed (deleted) only if no Sites are included in the group.

### To delete a site group

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



## Site Configuration



**Site Configuration** specifies for each feeding site:

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

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

### Site Configuration Page

 A screenshot of the 'Site Configuration' page. At the top, there are three input fields: 'Site Code', 'Site Name', and 'Site Group' (set to '-- ALL'). Below these is a 'Status' dropdown menu set to 'Not Configured' and an 'Apply' button. The main area contains a table titled 'Not Configured Sites' with columns for Site Name, Site Code, Site Group, and Meal Services. The table lists several sites, including 'ELEMENTARY' sites with codes 201, 204, and 203, and 'HIGH' and 'MIDDLE' schools with codes 216 and 217. At the bottom, there are navigation arrows, a page size dropdown set to '10', and a status indicator '18 items in 2 pages'.
 

Site Name	Site Code	Site Group	Meal Services
ELEMENTARY	201	Elementary School	
ELEMENTARY	204	Elementary School	
ELEMENTARY	000	Elementary School	
ELEMENTARY	203	Elementary School	
HIGH	216	High School	
MIDDLE	217	Middle School	

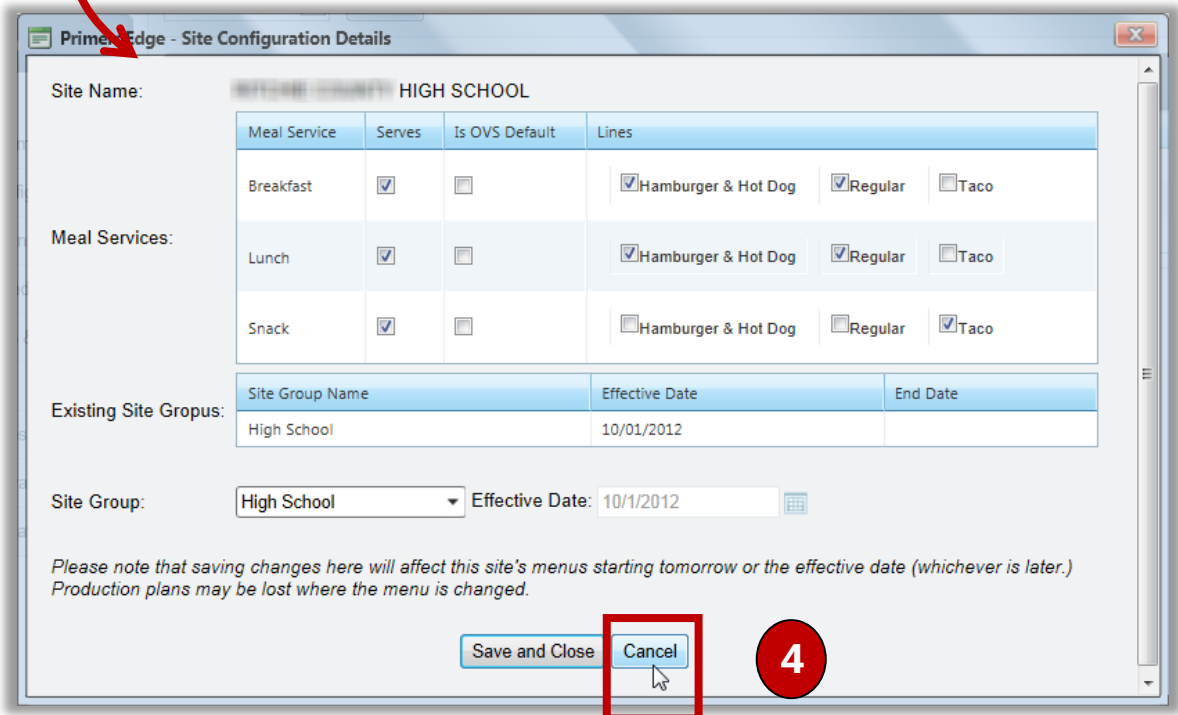
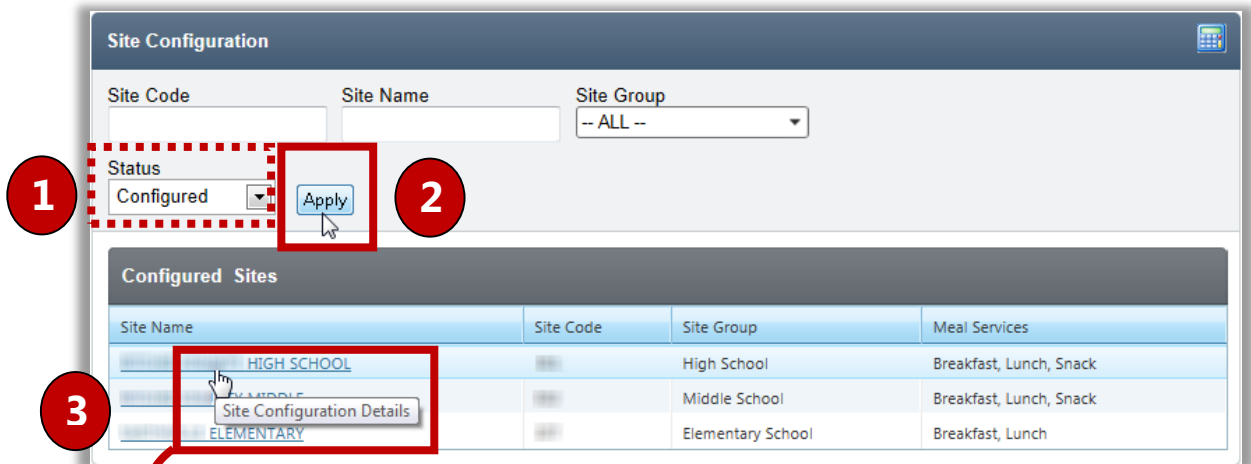
By default on the **Site Configuration** page:

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

## Displaying Site Configuration Details

### To display configuration details for a site

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



## Configuring a Site

### To configure a site

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

**Not Configured Sites**

Site Name	Site Code	Site Group	Meal Services
<a href="#">ABRAHAM LINCOLN MIDDLE SCHOOL</a>	1203		
<a href="#">ANDREW JACKSON HIGH SCHOOL</a>	1305		
<a href="#">CENTRAL OFFICE</a>	0000		
<a href="#">GEORGE WASHINGTON ELEMENTARY SCHOOL</a>	1101		
<a href="#">THOMAS JEFFERSON ELEMENTARY SCHOOL</a>	1102		

**Site Configuration Details**

Site Name: GEORGE WASHINGTON ELEMENTARY SCHOOL

Meal Service	Serves	Is OVS Default	Lines
Breakfast	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> A La Carte <input type="checkbox"/> Hamburger Line <input type="checkbox"/> Pizza Line <input checked="" type="checkbox"/> Regular
Lunch	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> A La Carte <input checked="" type="checkbox"/> Hamburger Line <input checked="" type="checkbox"/> Pizza Line <input checked="" type="checkbox"/> Regular
Snack	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> A La Carte <input type="checkbox"/> Hamburger Line <input type="checkbox"/> Pizza Line <input type="checkbox"/> Regular

**Site Configuration Details**

Site Name: GEORGE WASHINGTON ELEMENTARY SCHOOL

Meal Service	Serves	Is OVS Default	Lines
Summer Lunch	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Hamburger Line <input type="checkbox"/> Pizza Line <input type="checkbox"/> Regular

to display.

Site Group:  Effective Date:

Please note that saving changes here will affect this site's menus starting tomorrow or the effective date (whichever is later.)  
Production plans may be lost where the menu is changed.

**Save and Close**   **Cancel**

## Updating Site Details

### To update details for a configured site:

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

The screenshot shows the 'Site Configuration' window. At the top, there are input fields for 'Site Code', 'Site Name', and 'Site Group' (set to '-- ALL --'). Below these is a 'Status' dropdown set to 'Configured' and a 'Search' button. A table titled 'Configured Sites' lists the following data:

Site Name	Site Code	Site Group	Meal Services
<a href="#">SMITHVILLE ELEMENTARY</a>	207	Elementary School	Lunch, Snack

A red circle with the number '1' highlights the 'SMITHVILLE ELEMENTARY' link. A red arrow points from this link to the 'Site Configuration Details' window. This window shows the following details for 'SMITHVILLE ELEMENTARY':

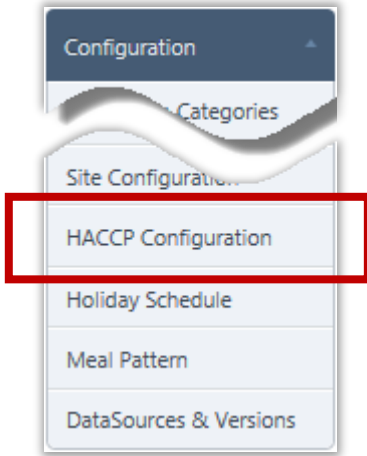
- Site Name:** SMITHVILLE ELEMENTARY
- Meal Services:**

Meal Service	Serves	Is OVS Default	Lines
Breakfast	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Hamburger & Hot Dog <input checked="" type="checkbox"/> Regular <input type="checkbox"/> Taco
Lunch	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Hamburger & Hot Dog <input checked="" type="checkbox"/> Regular <input checked="" type="checkbox"/> Taco
Snack	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> Hamburger & Hot Dog <input type="checkbox"/> Regular <input type="checkbox"/> Taco
- Existing Site Groups:**

Site Group Name	Effective Date	End Date
Elementary School	10/01/2012	
- Site Group:** Elementary School (dropdown), Effective Date: 10/1/2012

A red circle with the number '2' highlights the 'Meal Services' section. At the bottom of the window, a red circle with the number '3' highlights the 'Save and Close' button. A note at the bottom of the window reads: 'Please note that saving changes here will affect this site's menus starting tomorrow or the effective date (whichever is later.) Production plans may be lost where the menu is changed.'

# HACCP Configuration



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

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

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

## HACCP Page

**HACCP Configuration**

Data Source: -- ALL -- Apply

**HACCP Processes**

+ Add new record Refresh

Process Description	Short Name	Added By	Added On	Modified By	Modified On	Detail	Delete
Process 1: No Cook	No Cook	Cybersoft Support	7/22/2011 7:55 PM				
Process 2: Same day service	Same day service	Cybersoft Support	7/22/2011 7:59 PM				
Process 3: Complex food	Complex food	Cybersoft Support	7/22/2011 8:02 PM				

Page size: 10 3 items in 1 pages

**HACCP CCPs (Critical control points)**

+ Add new record Refresh

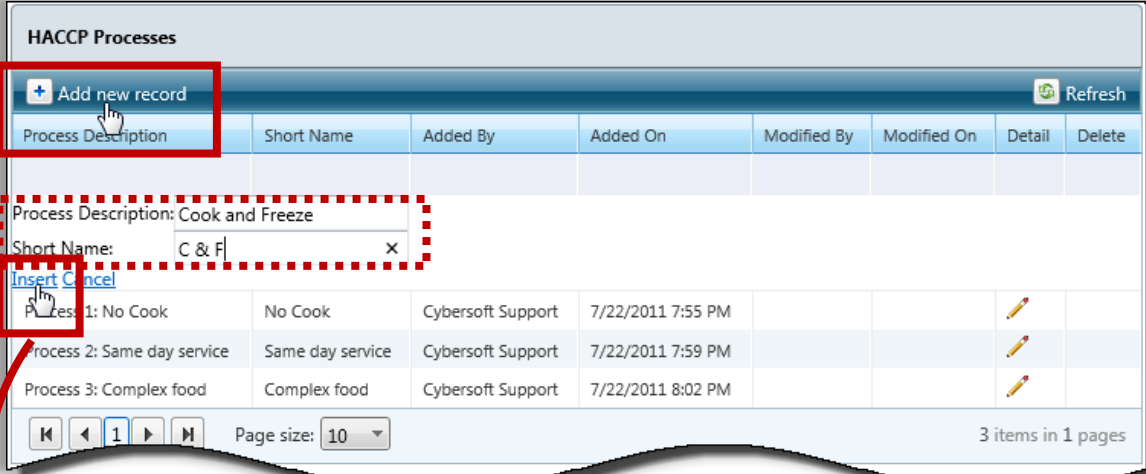
CCP Description	Short Name	Critical Limit	Default Corrective Action	Modified By/On	Edit	Delete
Cold	Cold Hold	Hold at <= 41.00 °F	Discard the food if it cannot be determined how long the food temperature	Added By: Cybersoft Support Added on 7/22/2011		
Cooking	Cook	Heat to <= 165.00 °F for 15 seconds	Continue cooking food until the internal temperature reaches the required temperature.	Added By: Cybersoft Support Added on 7/22/2011		

Page size: 10 7 items in 1 pages

## Adding a HACCP Process

### To add a HACCP process

1. Click .
2. Enter a name for the process in **Process Description** and a brief name in **Short Name**.
3. Click [Insert](#).

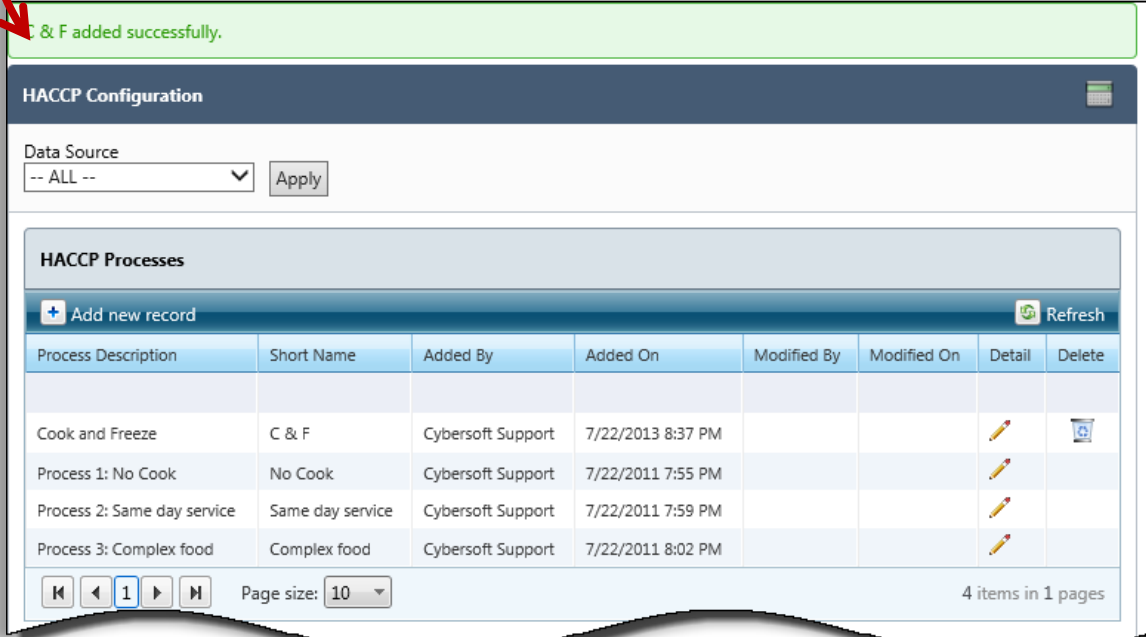


The screenshot shows the HACCP Processes table with three annotations:

- 1**: A red box highlights the **+ Add new record** button.
- 2**: A red dashed box highlights the input fields for **Process Description: Cook and Freeze** and **Short Name: C & F**.
- 3**: A red box highlights the **Insert** button.

Process Description	Short Name	Added By	Added On	Modified By	Modified On	Detail	Delete
Process 1: No Cook	No Cook	Cybersoft Support	7/22/2011 7:55 PM				
Process 2: Same day service	Same day service	Cybersoft Support	7/22/2011 7:59 PM				
Process 3: Complex food	Complex food	Cybersoft Support	7/22/2011 8:02 PM				

Page size: 10 | 3 items in 1 pages



The screenshot shows the HACCP Configuration page with a green success message: **C & F added successfully.**

**HACCP Configuration**




Data Source: -- ALL --

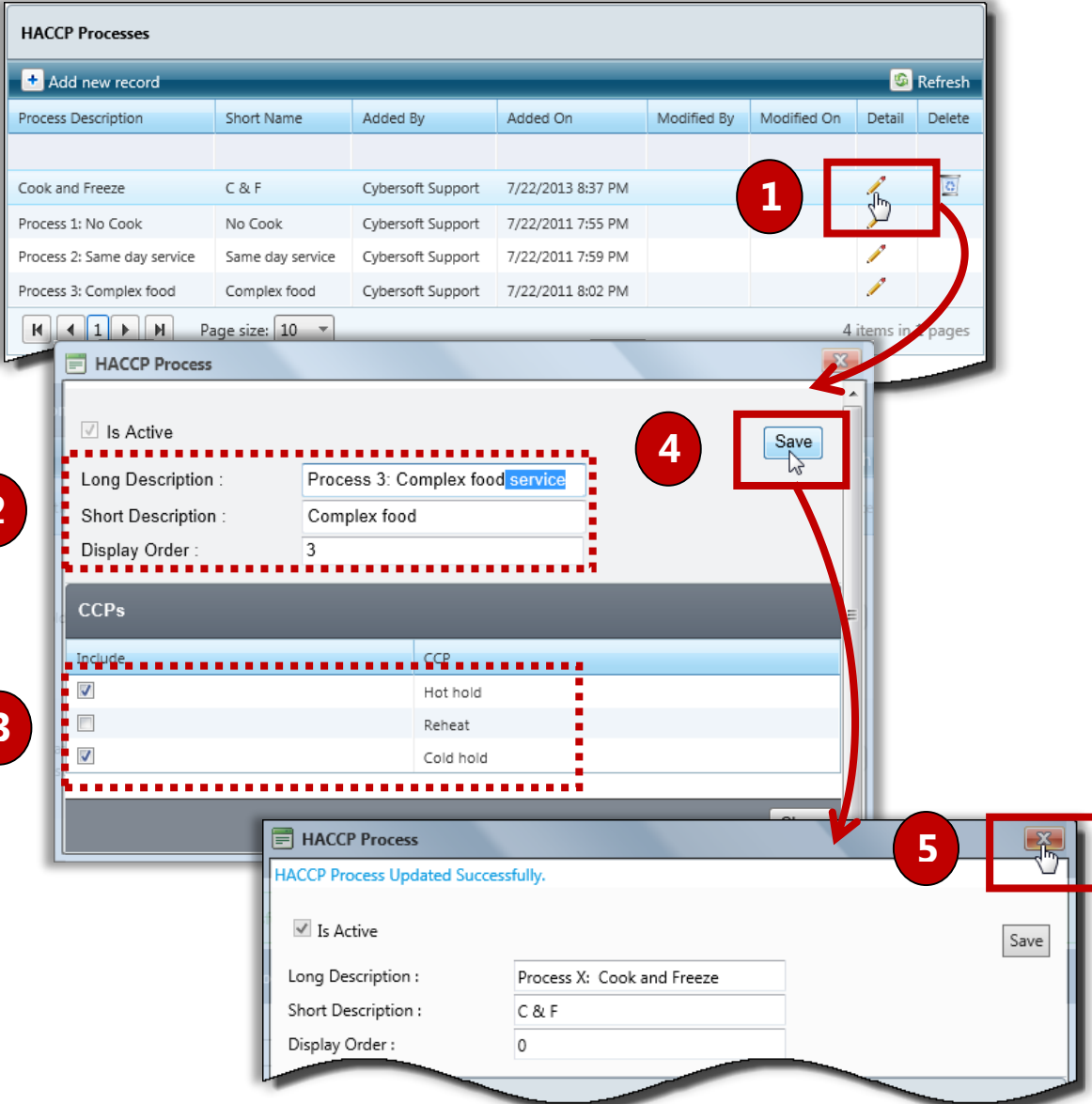
Process Description	Short Name	Added By	Added On	Modified By	Modified On	Detail	Delete
Cook and Freeze	C & F	Cybersoft Support	7/22/2013 8:37 PM				
Process 1: No Cook	No Cook	Cybersoft Support	7/22/2011 7:55 PM				
Process 2: Same day service	Same day service	Cybersoft Support	7/22/2011 7:59 PM				
Process 3: Complex food	Complex food	Cybersoft Support	7/22/2011 8:02 PM				

Page size: 10 | 4 items in 1 pages






## Updating a HACCP Process

### To update a HACCP process

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



**HACCP Processes**

Process Description	Short Name	Added By	Added On	Modified By	Modified On	Detail	Delete
Cook and Freeze	C & F	Cybersoft Support	7/22/2013 8:37 PM				
Process 1: No Cook	No Cook	Cybersoft Support	7/22/2011 7:55 PM				
Process 2: Same day service	Same day service	Cybersoft Support	7/22/2011 7:59 PM				
Process 3: Complex food	Complex food	Cybersoft Support	7/22/2011 8:02 PM				

**HACCP Process**

Is Active

Long Description :

Short Description :

Display Order :

**CCPs**

Include	CCP
<input checked="" type="checkbox"/>	Hot hold
<input type="checkbox"/>	Reheat
<input checked="" type="checkbox"/>	Cold hold

**HACCP Process**

HACCP Process Updated Successfully.

Is Active

Long Description :


Short Description :

Display Order :


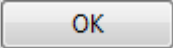
Save

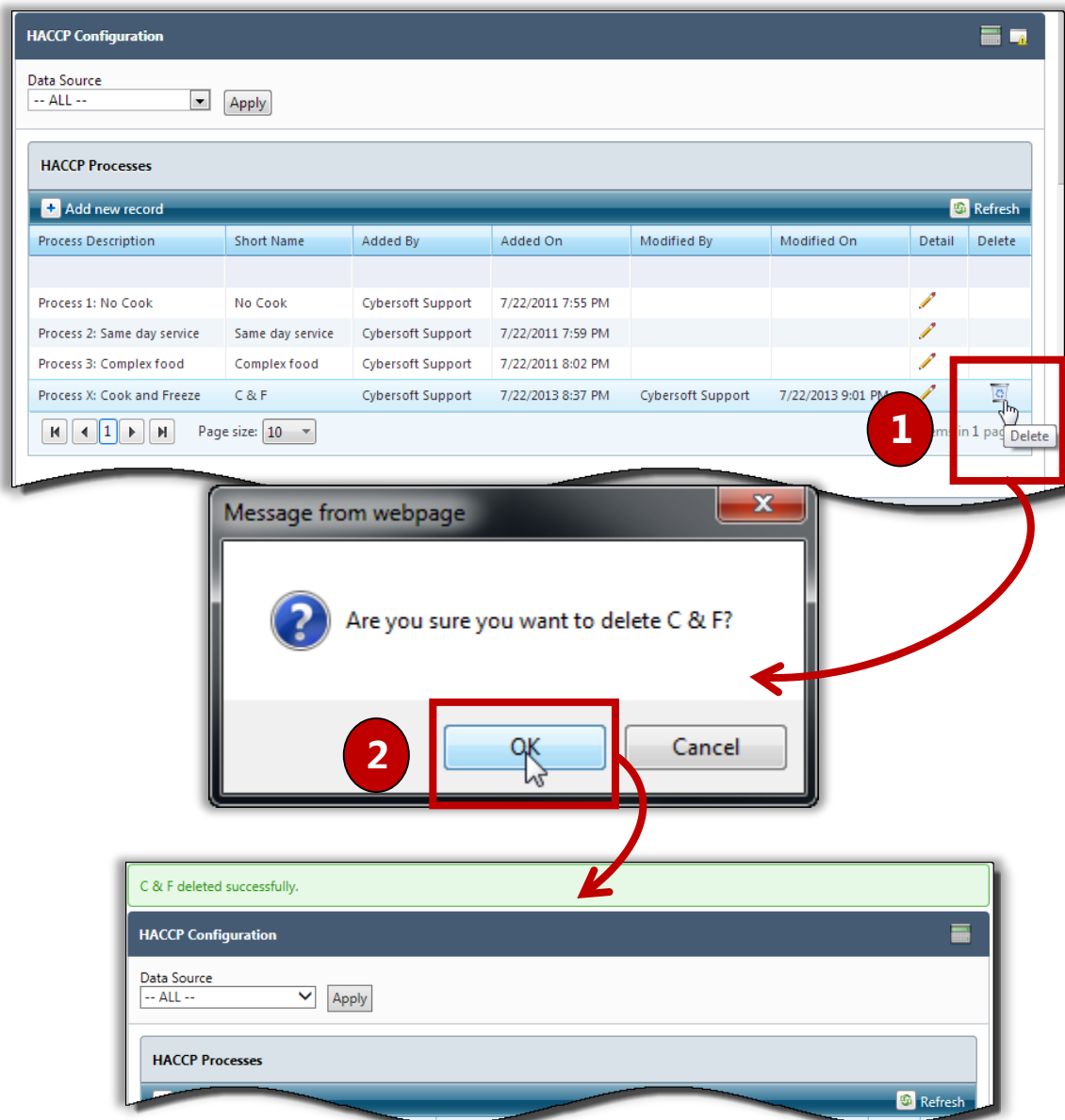


## Deleting a HACCP Process

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

### To delete a HACCP process

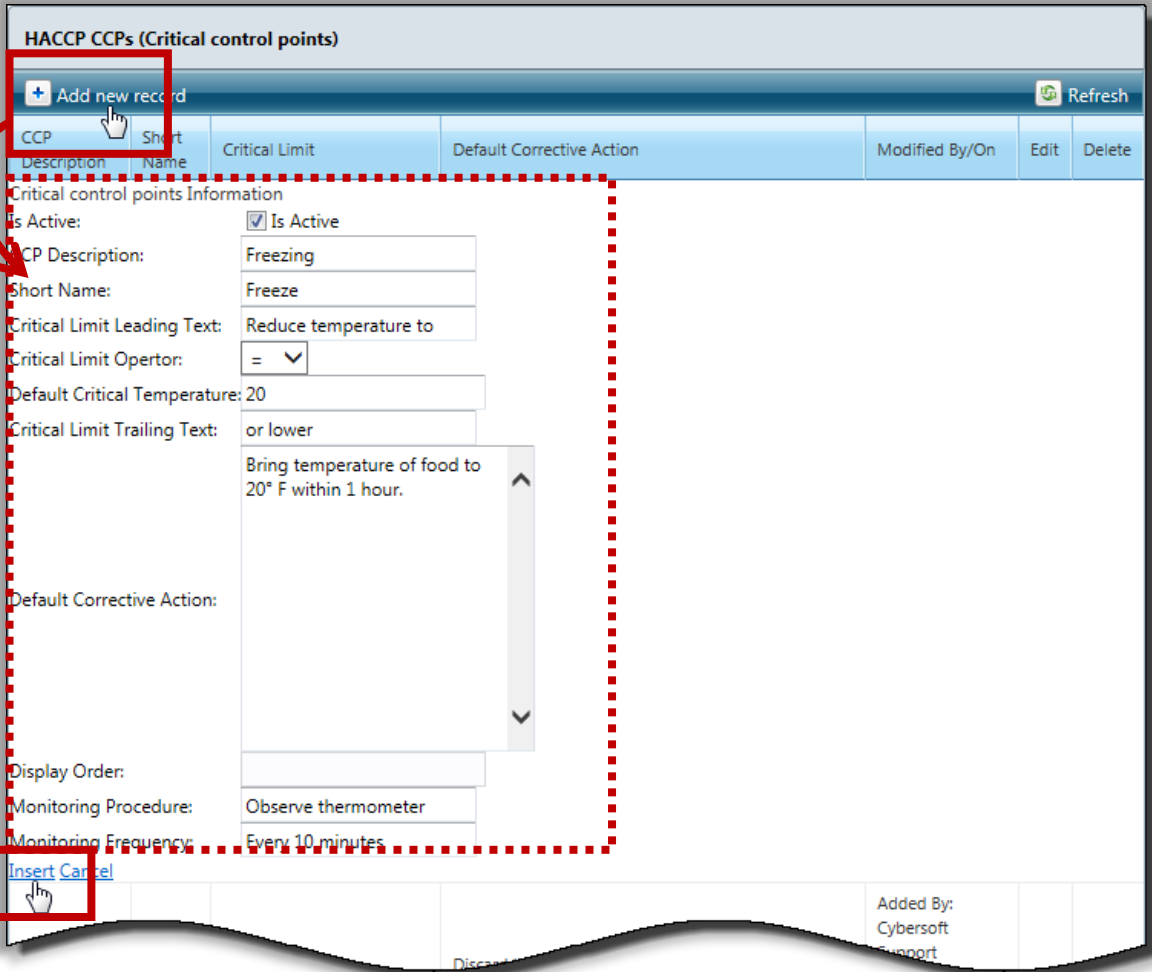
1. Click **Delete** (  ) in a process listing.
2. Click  to confirm the removal.



## Adding a Critical Control Point

### To add a Critical Control Point (CCP)

1. Click .
2. Enter or select Critical Control Point information.
3. Click [Insert](#).




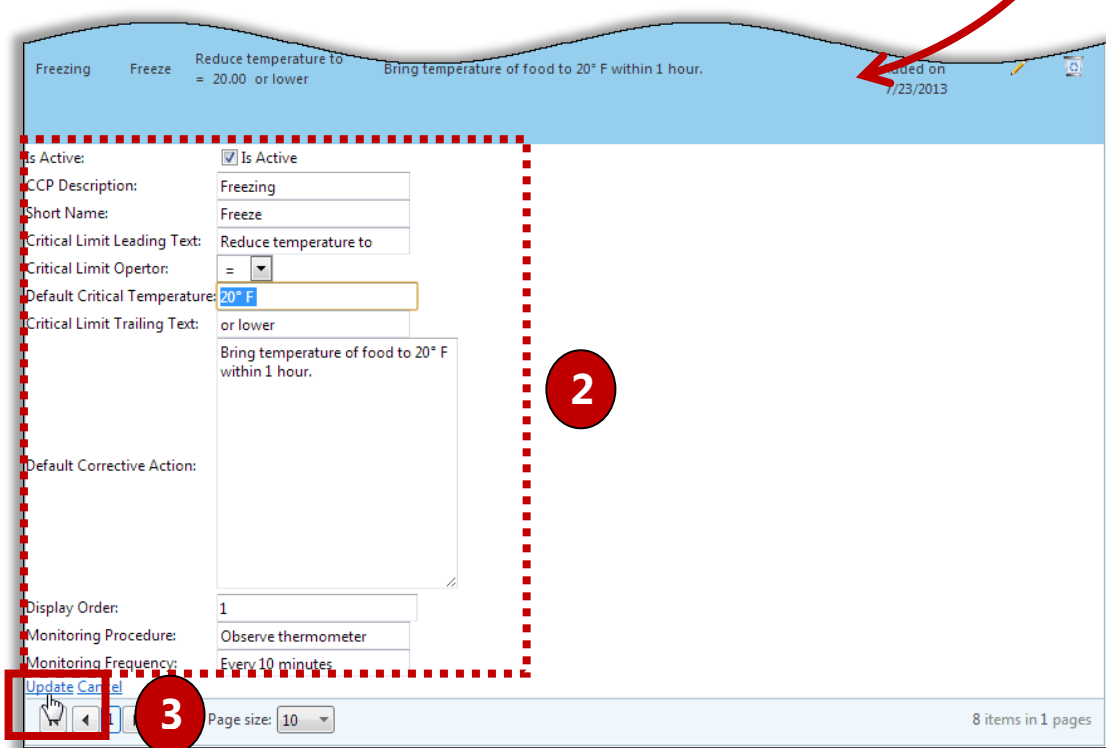
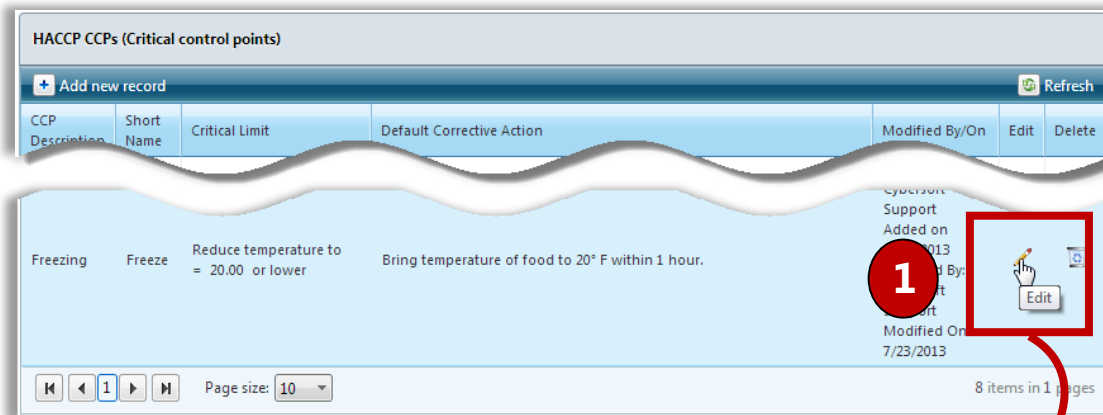
The screenshot displays the 'HACCP CCPs (Critical control points)' form. A red box highlights the '+ Add new record' button, with a red circle and arrow labeled '1' pointing to it. A red dashed box highlights the form fields, with a red circle and arrow labeled '2' pointing to it. A red box highlights the 'Insert' button, with a red circle and arrow labeled '3' pointing to it. Below the form, a green message box states 'Freeze added successfully.' The form fields include: 'Is Active' (checked), 'CCP Description' (Freezing), 'Short Name' (Freeze), 'Critical Limit Leading Text' (Reduce temperature to), 'Critical Limit Operator' (=), 'Default Critical Temperature' (20), 'Critical Limit Trailing Text' (or lower), 'Default Corrective Action' (Bring temperature of food to 20° F within 1 hour.), 'Monitoring Procedure' (Observe thermometer), and 'Monitoring Frequency' (Every 10 minutes).

CCP	Short Name	Critical Limit	Default Corrective Action	Modified By/On	Edit	Delete
Freezing	Freeze	Reduce temperature to	Bring temperature of food to 20° F within 1 hour.			


## Updating a Critical Control Point

### To update a Critical Control Point (CCP)


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



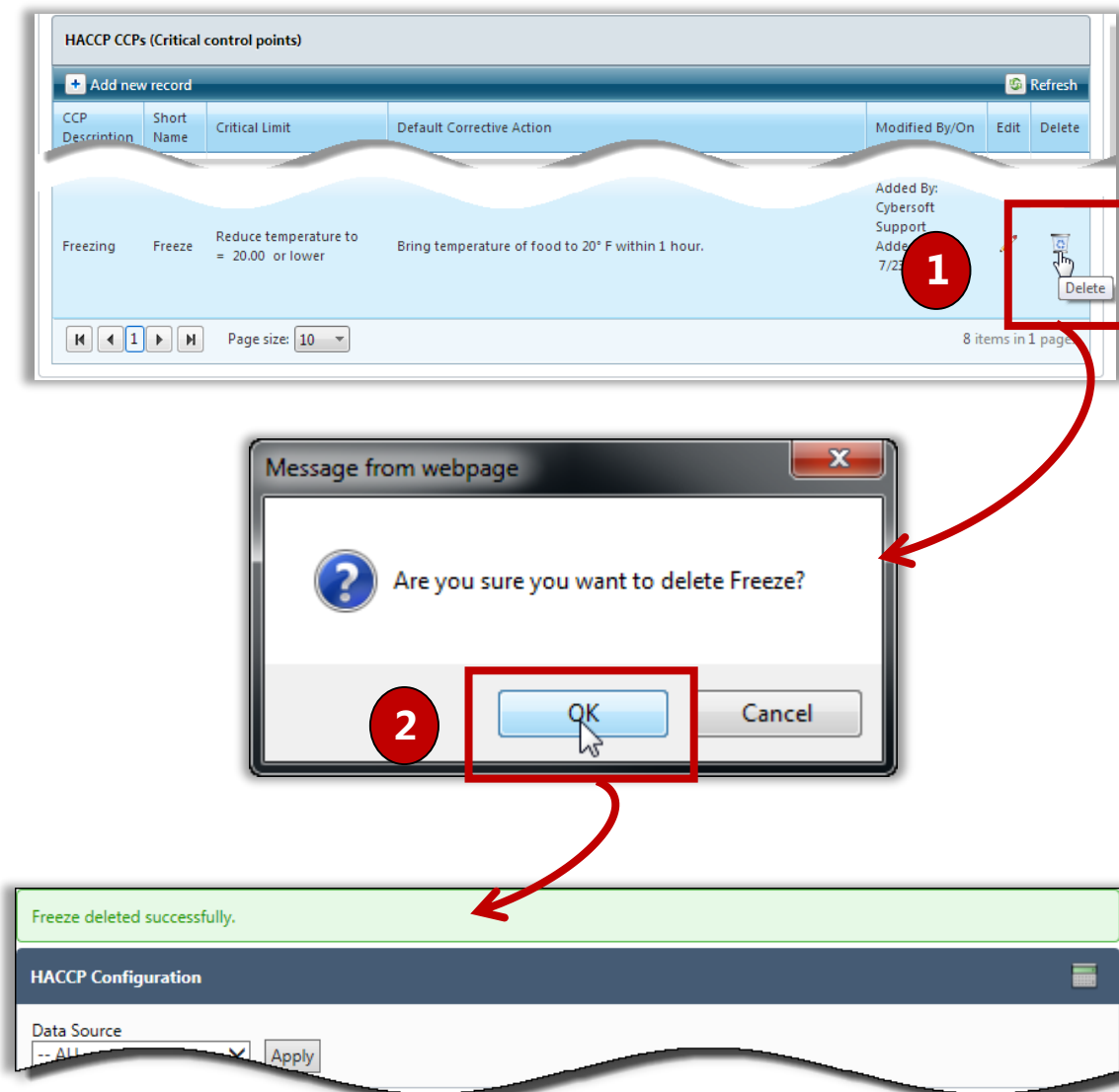
## Deleting a Critical Control Point

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

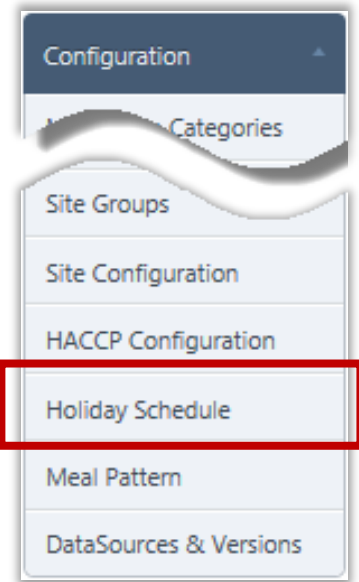
### To delete a Critical Control Point

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

2. Click  .



# Holiday Schedule



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

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

Holidays are set up before Menu assignment begins.

## Holiday Schedule Page

The screenshot shows the 'Holiday Schedule' page with a table of records. The table has columns for Date, Description, Added on, Edit, and Delete. There is an 'Add new record' button at the top left of the table area.

Date	Description	Added on	Edit	Delete
11/29/2013	Thanksgiving Break	7/21/2013 6:13 PM		
11/28/2013	Thanksgiving Break	7/21/2013 6:13 PM		
9/6/2013	Teacher Inservice	7/21/2013 6:12 PM		
1/2/2012	Happy New Year	11/18/2011 11:28 PM		
12/26/2011	Merry christmas	11/18/2011 11:28 PM		
12/5/2011	Holiday	11/18/2011 11:28 PM		
11/11/2011	Holiday	11/18/2011 11:28 PM		


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

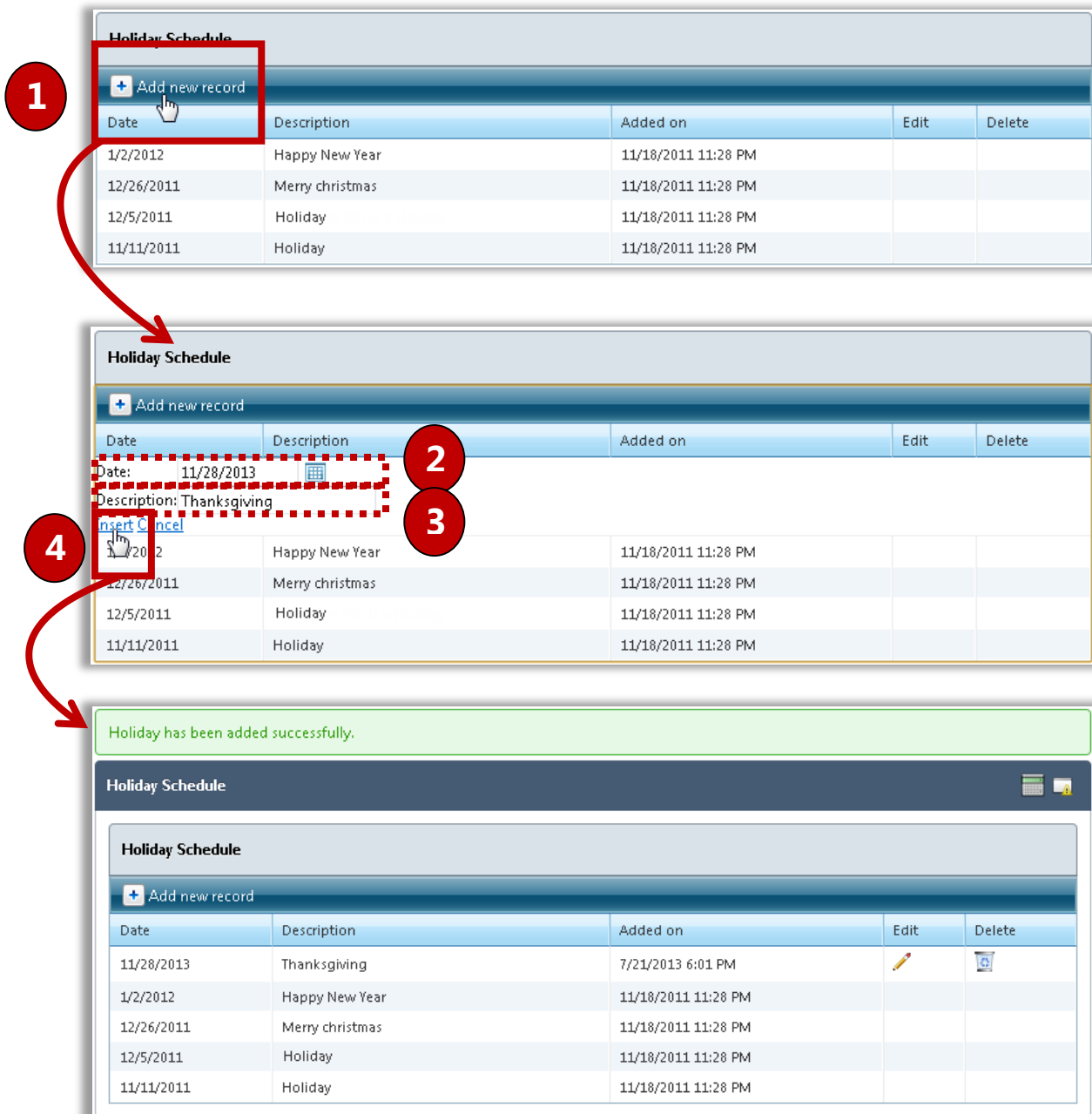
- All existing holidays are listed in the **Holiday Schedule** group.

## Adding a Holiday

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

### To add a holiday

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



**1**

Date	Description	Added on	Edit	Delete
1/2/2012	Happy New Year	11/18/2011 11:28 PM		
12/26/2011	Merry christmas	11/18/2011 11:28 PM		
12/5/2011	Holiday	11/18/2011 11:28 PM		
11/11/2011	Holiday	11/18/2011 11:28 PM		

**2**



Date: 11/28/2013

**3**



Description: Thanksgiving

**4**

Insert


Date	Description	Added on	Edit	Delete
11/28/2013	Thanksgiving	7/21/2013 6:01 PM		
1/2/2012	Happy New Year	11/18/2011 11:28 PM		
12/26/2011	Merry christmas	11/18/2011 11:28 PM		
12/5/2011	Holiday	11/18/2011 11:28 PM		
11/11/2011	Holiday	11/18/2011 11:28 PM		

Holiday has been added successfully.

Date	Description	Added on	Edit	Delete
11/28/2013	Thanksgiving	7/21/2013 6:01 PM		
1/2/2012	Happy New Year	11/18/2011 11:28 PM		
12/26/2011	Merry christmas	11/18/2011 11:28 PM		
12/5/2011	Holiday	11/18/2011 11:28 PM		
11/11/2011	Holiday	11/18/2011 11:28 PM		



## Updating Holiday Details

### To change a Holiday description

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



**Holiday Schedule**

+ Add new record

Date	Description	Added on	Edit	Delete
11/28/2013	Thanksgiving	7/21/2013 6:01 PM	 Edit	
1/2/2012	Happy New Year	11/18/2011 11:28 PM		
12/26/2011	Merry christmas	11/18/2011 11:28 PM		
12/5/2011	Holiday	11/18/2011 11:28 PM		
11/11/2011	Holiday	11/18/2011 11:28 PM		

**Holiday Schedule**


+ Add new record

Date	Description	Added on	Edit	Delete
11/28/2013	Thanksgiving	7/21/2013 6:01 PM		
Date: <input type="text" value="11/28/2013"/> 				
Description: <input type="text" value="Thanksgiving Break"/>				
<a href="#">Update</a> <a href="#">Cancel</a>				
1/2/2012	Happy New Year	11/18/2011 11:28 PM		
12/26/2011	Merry christmas	11/18/2011 11:28 PM		
12/5/2011	Holiday	11/18/2011 11:28 PM		
11/11/2011	Holiday	11/18/2011 11:28 PM		

Holiday has been updated successfully.

**Holiday Schedule**


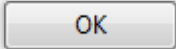
+ Add new record

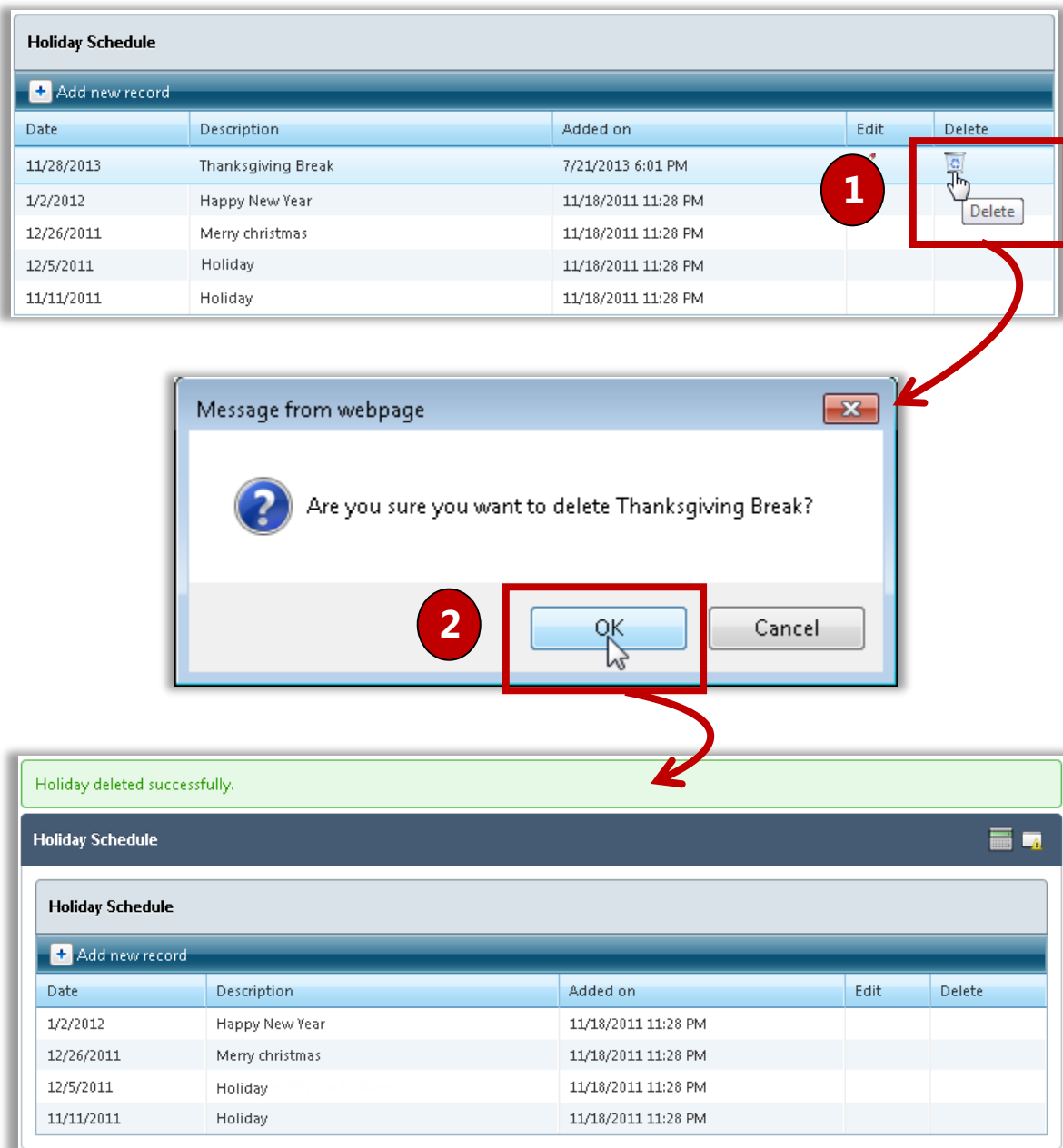
Date	Description	Added on	Edit	Delete
11/28/2013	Thanksgiving Break	7/21/2013 6:01 PM		
1/2/2012	Happy New Year	11/18/2011 11:28 PM		
12/26/2011	Merry christmas	11/18/2011 11:28 PM		
12/5/2011	Holiday	11/18/2011 11:28 PM		
11/11/2011	Holiday	11/18/2011 11:28 PM		

## Deleting a Holiday

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


### To delete a Holiday

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



**Holiday Schedule**

+ Add new record

Date	Description	Added on	Edit	Delete
11/28/2013	Thanksgiving Break	7/21/2013 6:01 PM		 Delete
1/2/2012	Happy New Year	11/18/2011 11:28 PM		
12/26/2011	Merry christmas	11/18/2011 11:28 PM		
12/5/2011	Holiday	11/18/2011 11:28 PM		
11/11/2011	Holiday	11/18/2011 11:28 PM		

Message from webpage

Are you sure you want to delete Thanksgiving Break?

OK Cancel

Holiday deleted successfully.

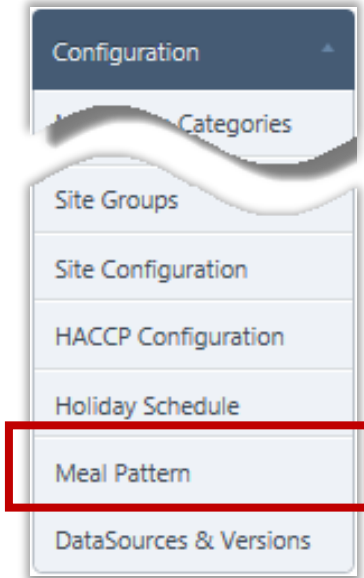
**Holiday Schedule**

+ Add new record

Date	Description	Added on	Edit	Delete
1/2/2012	Happy New Year	11/18/2011 11:28 PM		
12/26/2011	Merry christmas	11/18/2011 11:28 PM		
12/5/2011	Holiday	11/18/2011 11:28 PM		
11/11/2011	Holiday	11/18/2011 11:28 PM		



# Meal Pattern



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

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

## Meal Pattern Page

A screenshot of the 'Meal Pattern List' table. The table has columns for Meal Pattern, Type, Is Food Based, Added By, Added On, Last Modified By, Last Modified On, Edit, and Delete. There are five rows of data.

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

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

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

## Displaying Meal Pattern Details

### To view Meal Pattern details

1. Expand a Meal Pattern listing in the **Meal Pattern List**.
2. Click a [Serving Group Name](#) link.
3. When multiple meal services are available for a meal pattern, click the **Meal Service** tab to view nutrient and food component requirements.

**Meal Pattern List**

Meal Pattern	Type	Is Food Based	Added By	Added On	Last Modified By	Last Modified On	Edit	Delete
> [USDA] Modified RDA	Age Based	False	Cybersoft Support	5/25/2011 11:53 AM	Cybersoft Support	7/1/2013 5:35 PM		
> [USDA] Standard RDA	Age Based	False	Cybersoft Support	5/25/2011 11:53 AM	Cybersoft Support	7/1/2013 5:35 PM		
> Adults 51+	Age Based	False	Cybersoft Support	5/25/2011 11:53 AM	Cybersoft Support	7/1/2013 5:35 PM		
> [USDA] Traditional Meal Pattern	Grade Based	True	Cybersoft Support	5/25/2011 11:53 AM	Cybersoft Support	7/1/2013 5:35 PM		
▼ [USDA] Meal Pattern SY 2012-2014	Grade Based	True	Cybersoft Support	4/10/2012 11:56 AM	Cybersoft Support	7/1/2013 5:35 PM		

Serving Group Name	Meal Service
<a href="#">K-5</a>	Breakfast,Lunch
<a href="#">6-8</a>	Breakfast,Lunch
<a href="#">9-12</a>	Breakfast,Lunch
<a href="#">Adult</a>	Breakfast,Lunch
<a href="#">Ala Carte</a>	Breakfast,Lunch
<a href="#">K-8</a>	Breakfast,Lunch
<a href="#">K-12</a>	Breakfast

**Edit Serving Group**

<< [Back To Meal Pattern](#)

Serving Group:

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

Services: Breakfast

Group Name:

K-12


Nutrient	USDA Standard
FE (Kcal)	[450.000 - 500.000]
Sfat (g)	<10.000 % calories

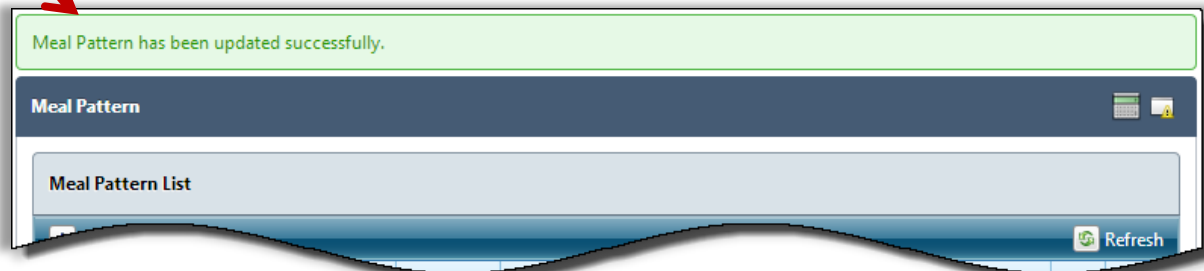
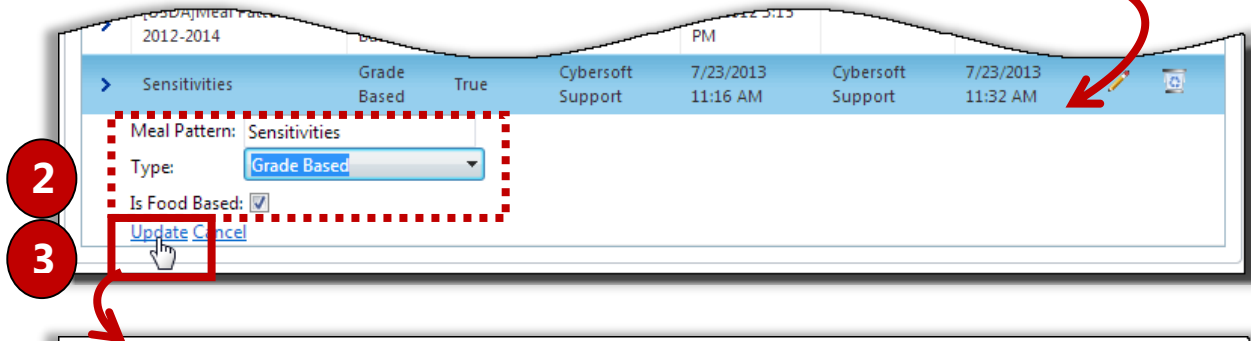
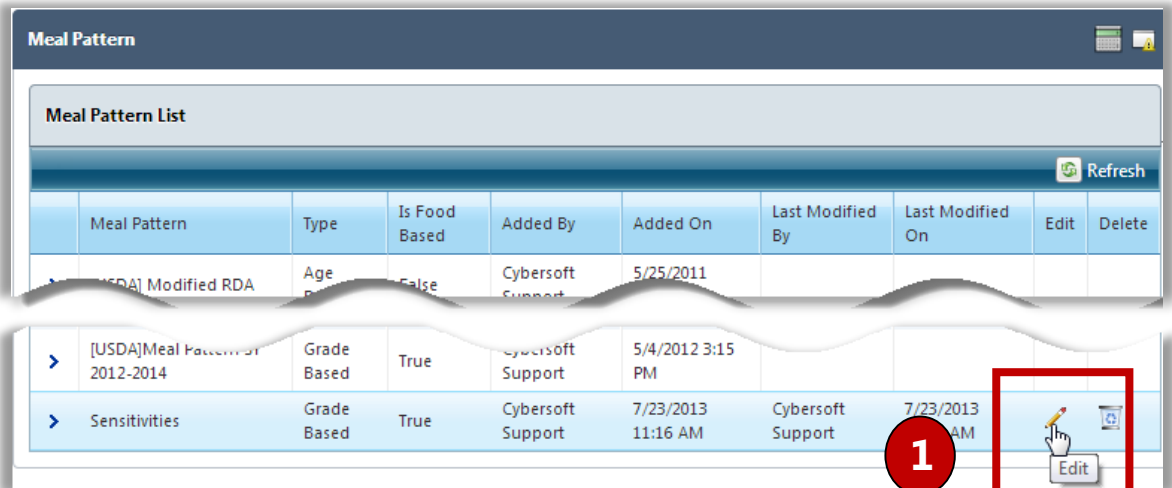
  

Food Component	Daily Standard	Weekly Standard
Fruits (cups) (Fruit)	≥0.500	≥2.500
Fruit Juice only (Fruit-J)		≤100.000 %
Fluid Milk (cups) (MILK-F)	≥1.000	≥5.000
Varieties of Milk (MILK-V)	≥2.000	
Grains (oz eq.) (Grains)	≥1.000	[9.000 - 10.000]
Whole Grain-Rich (WG)		≥50.000 % Grains (oz eq.)
Grain Based Dessert (Grain-D)		≤2.000
Meat/Meat Alternates (oz eq.) (Meat/MA)		≥0.000

## Updating Meal Pattern Basis

### To change Meal Pattern basis


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

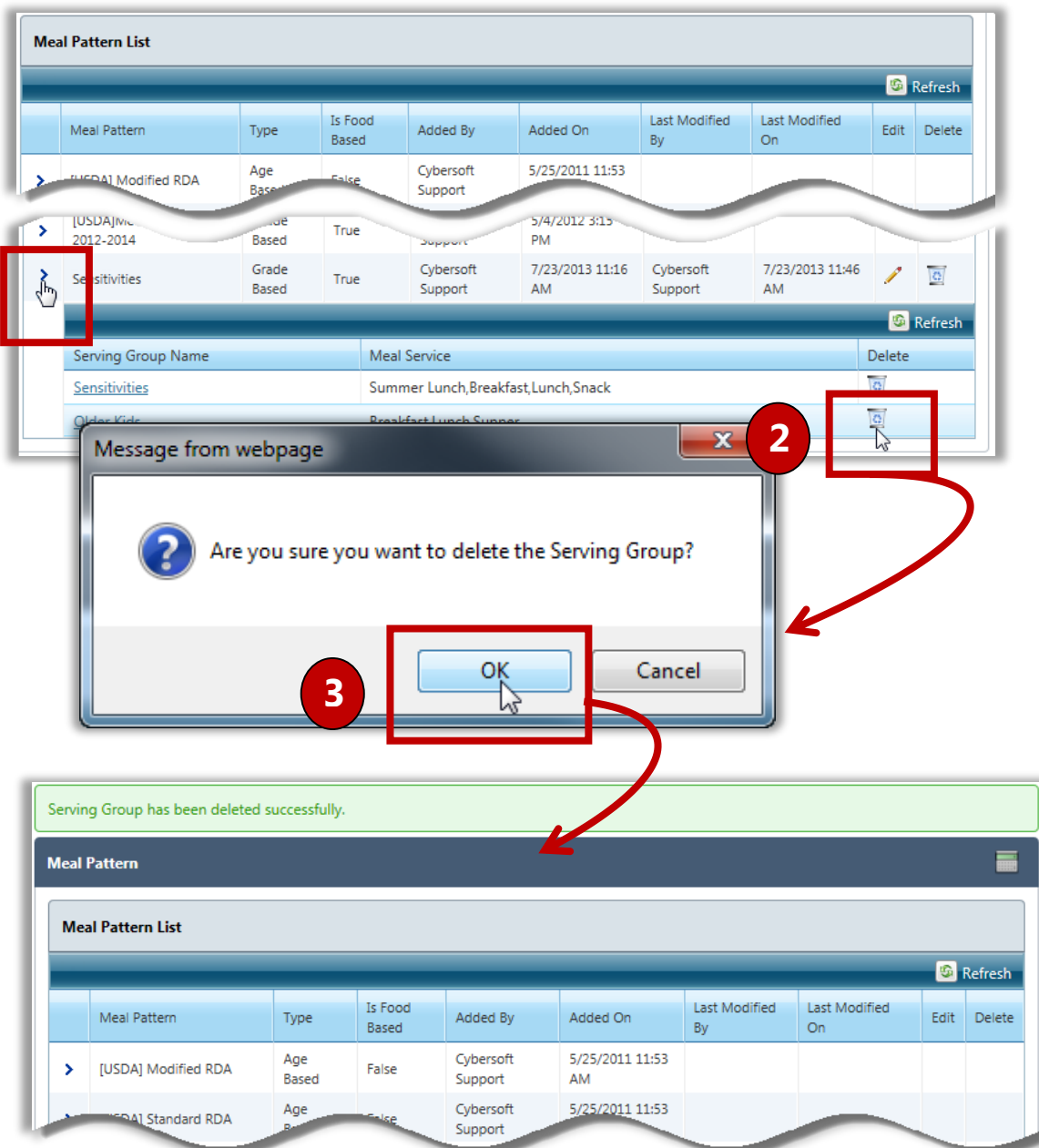


## Deleting a Serving Group from a Meal Pattern

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

### To delete a Serving Group



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





The screenshot illustrates the process of deleting a serving group from a meal pattern. It is divided into three numbered steps:

- Step 1:** A red box highlights the expand icon (a blue arrow) next to the 'Sensitivities' meal pattern in the 'Meal Pattern List' table.
- Step 2:** A red box highlights the 'Delete' button (a trash can icon) next to the 'Sensitivities' serving group in the expanded view.
- Step 3:** A red box highlights the 'OK' button in the 'Message from webpage' dialog box, which asks 'Are you sure you want to delete the Serving Group?'.

Below the dialog box, a green notification bar states 'Serving Group has been deleted successfully.' The final screenshot shows the 'Meal Pattern List' table with the 'Sensitivities' serving group removed.

Meal Pattern	Type	Is Food Based	Added By	Added On	Last Modified By	Last Modified On	Edit	Delete
[USDA] Modified RDA	Age Based	False	Cybersoft Support	5/25/2011 11:53 AM				
[USDA] Modified RDA 2012-2014	Age Based	True	Cybersoft Support	5/4/2012 3:15 PM				
Sensitivities	Grade Based	True	Cybersoft Support	7/23/2013 11:16 AM	Cybersoft Support	7/23/2013 11:46 AM		

Serving Group Name	Meal Service	Delete
Sensitivities	Summer Lunch,Breakfast,Lunch,Snack	
Older Kids	Breakfast,Lunch,Supper	


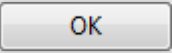
  

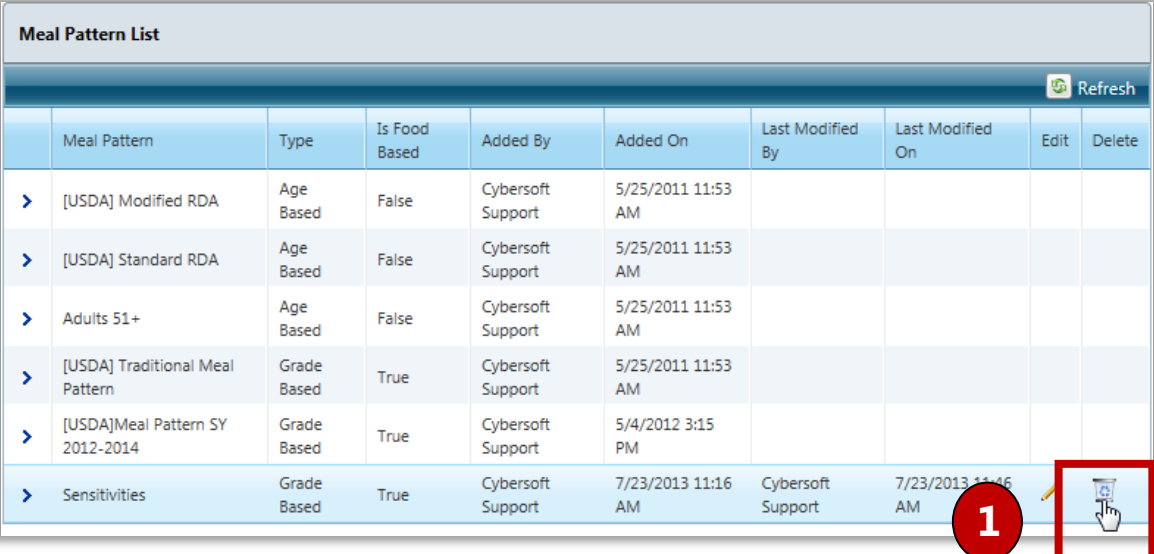
Meal Pattern	Type	Is Food Based	Added By	Added On	Last Modified By	Last Modified On	Edit	Delete
[USDA] Modified RDA	Age Based	False	Cybersoft Support	5/25/2011 11:53 AM				
[USDA] Standard RDA	Age Based	False	Cybersoft Support	5/25/2011 11:53 AM				


## Deleting a Meal Pattern

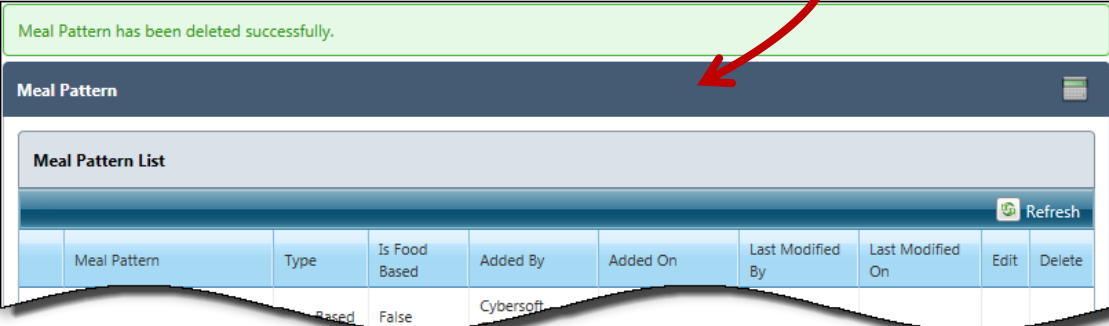
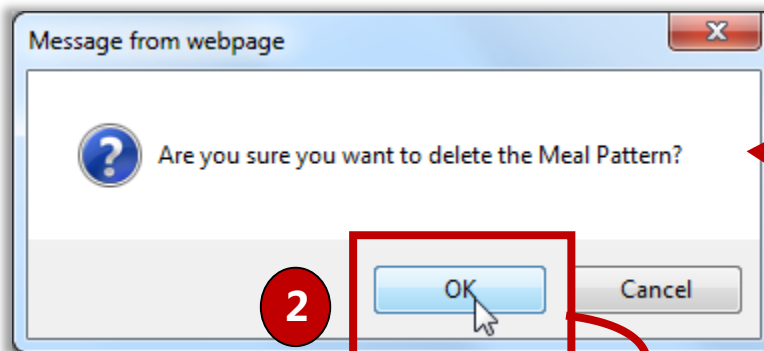
Only custom Meal Patterns can be removed.

### To delete a Meal Pattern

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



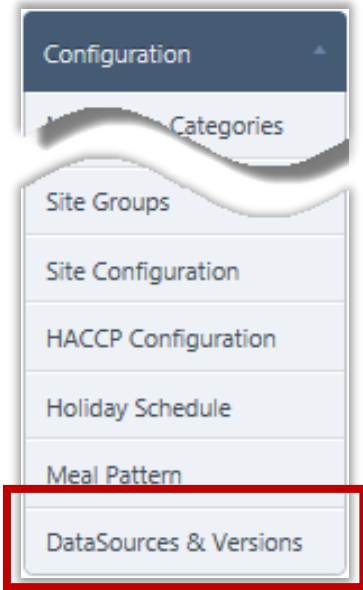
Meal Pattern	Type	Is Food Based	Added By	Added On	Last Modified By	Last Modified On	Edit	Delete
> [USDA] Modified RDA	Age Based	False	Cybersoft Support	5/25/2011 11:53 AM				
> [USDA] Standard RDA	Age Based	False	Cybersoft Support	5/25/2011 11:53 AM				
> Adults 51+	Age Based	False	Cybersoft Support	5/25/2011 11:53 AM				
> [USDA] Traditional Meal Pattern	Grade Based	True	Cybersoft Support	5/25/2011 11:53 AM				
> [USDA]Meal Pattern SY 2012-2014	Grade Based	True	Cybersoft Support	5/4/2012 3:15 PM				
> Sensitivities	Grade Based	True	Cybersoft Support	7/23/2013 11:16 AM	Cybersoft Support	7/23/2013 11:16 AM		



Meal Pattern has been deleted successfully.

Meal Pattern	Type	Is Food Based	Added By	Added On	Last Modified By	Last Modified On	Edit	Delete
> [USDA] Modified RDA	Age Based	False	Cybersoft Support	5/25/2011 11:53 AM				

# Data Sources & Versions



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

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

## Data Sources & Versions Page

The screenshot shows the 'DataSources & Versions' page. It contains two tables. The first table, 'Data Sources Owned', has columns for Data Source, Abbreviation, IngredientCodePrefix, RecipeCodePrefix, Data Source Type, AddedBy, and AddedOn. The second table, 'Accessible Data Sources', has columns for Data Source, Version, Owned By, Data Source Type, and Upgrade.

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

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

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

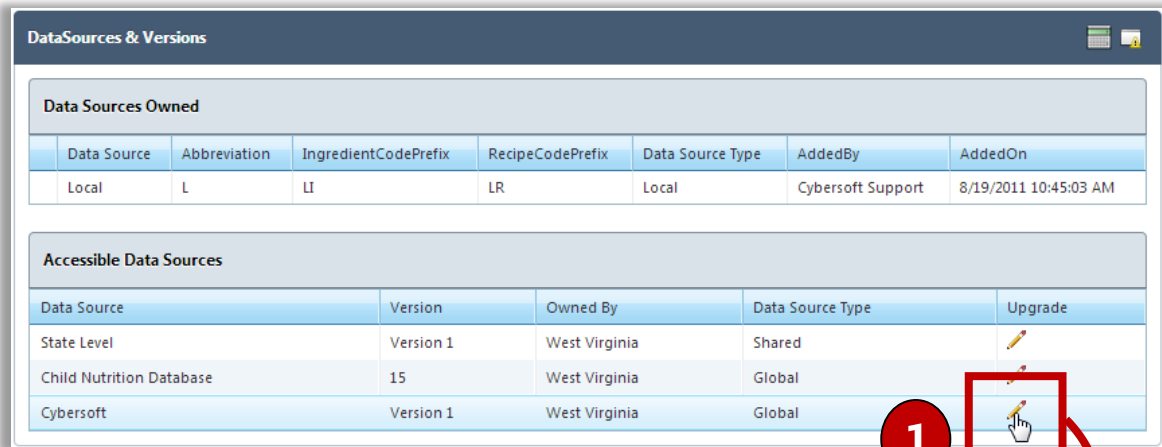
- All available data sources are listed.

## Upgrading a Data Source

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

### To upgrade a Data Source

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






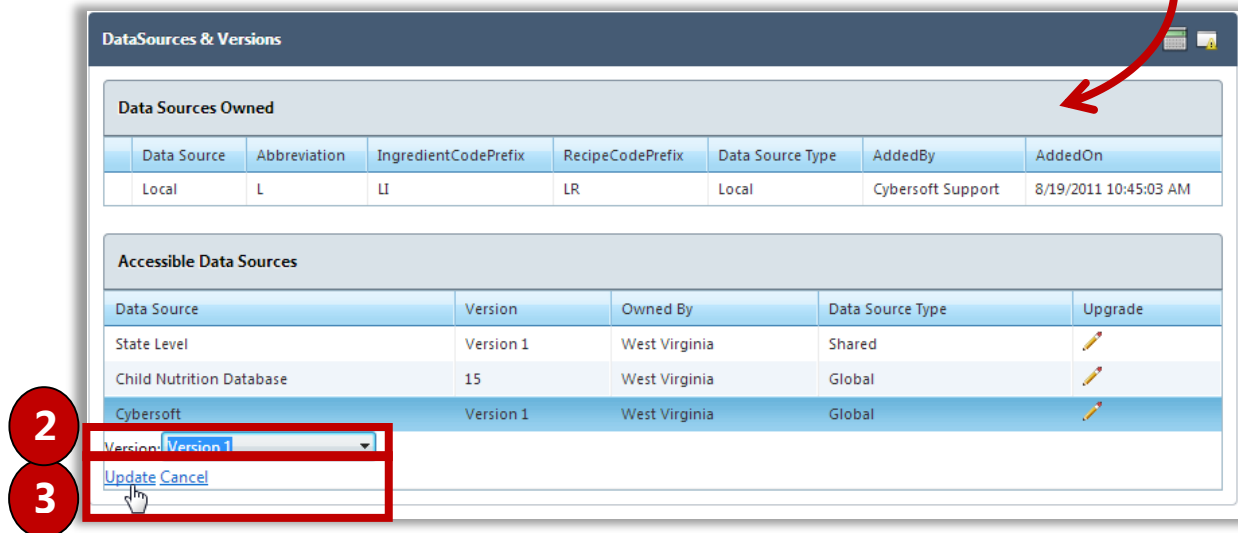
**DataSources & Versions**

**Data Sources Owned**

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

**Accessible Data Sources**

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






**DataSources & Versions**

**Data Sources Owned**

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

**Accessible Data Sources**

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

Version: **Version 1**

[Update](#) [Cancel](#)

◀ *End of Section* ▶



# A Working with PrimeroEdge

In this section you will learn:

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

## Open PrimeroEdge




### To open PrimeroEdge

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

The web login page appears.

## Log In To PrimeroEdge

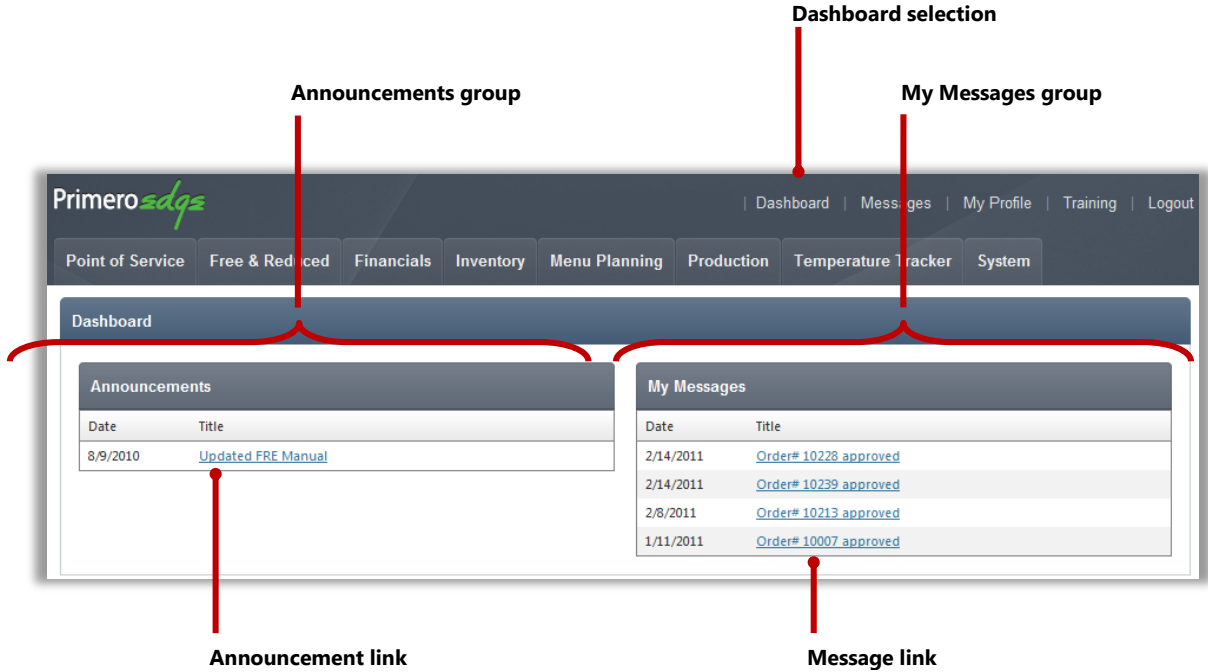
### To log in to PrimeroEdge

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



# Tour the PrimerEdge Dashboard

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

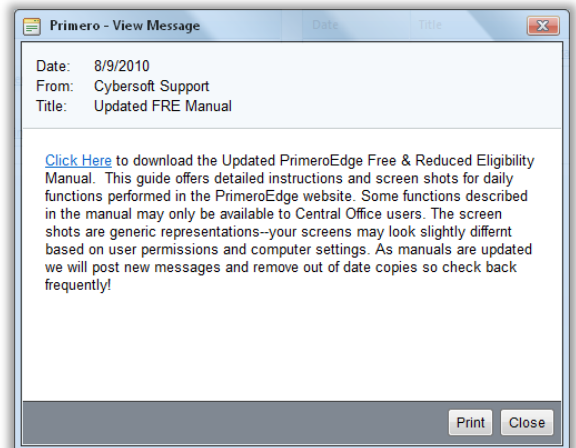
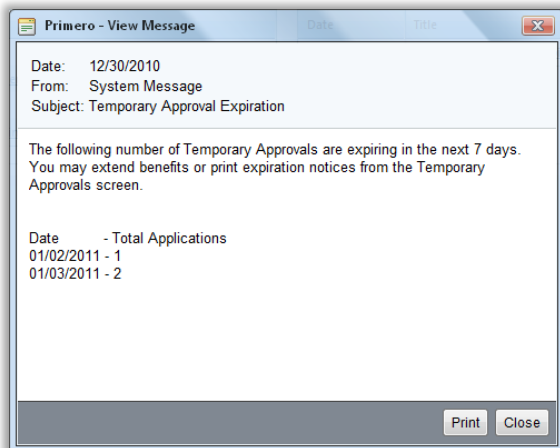


## Dashboard Groups

The Dashboard offers two groups:

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

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



## Navigate to Menu Planning

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

### To access the Menu Planning module

- Click the **Menu Planning** tab.

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



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

### ★ Note

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

## Log Out of PrimeroEdge

Logging out of PrimeroEdge can be performed from any page.

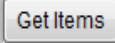

### To log out of PrimeroEdge

- Click **Logout**.



## How to Use This Manual

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

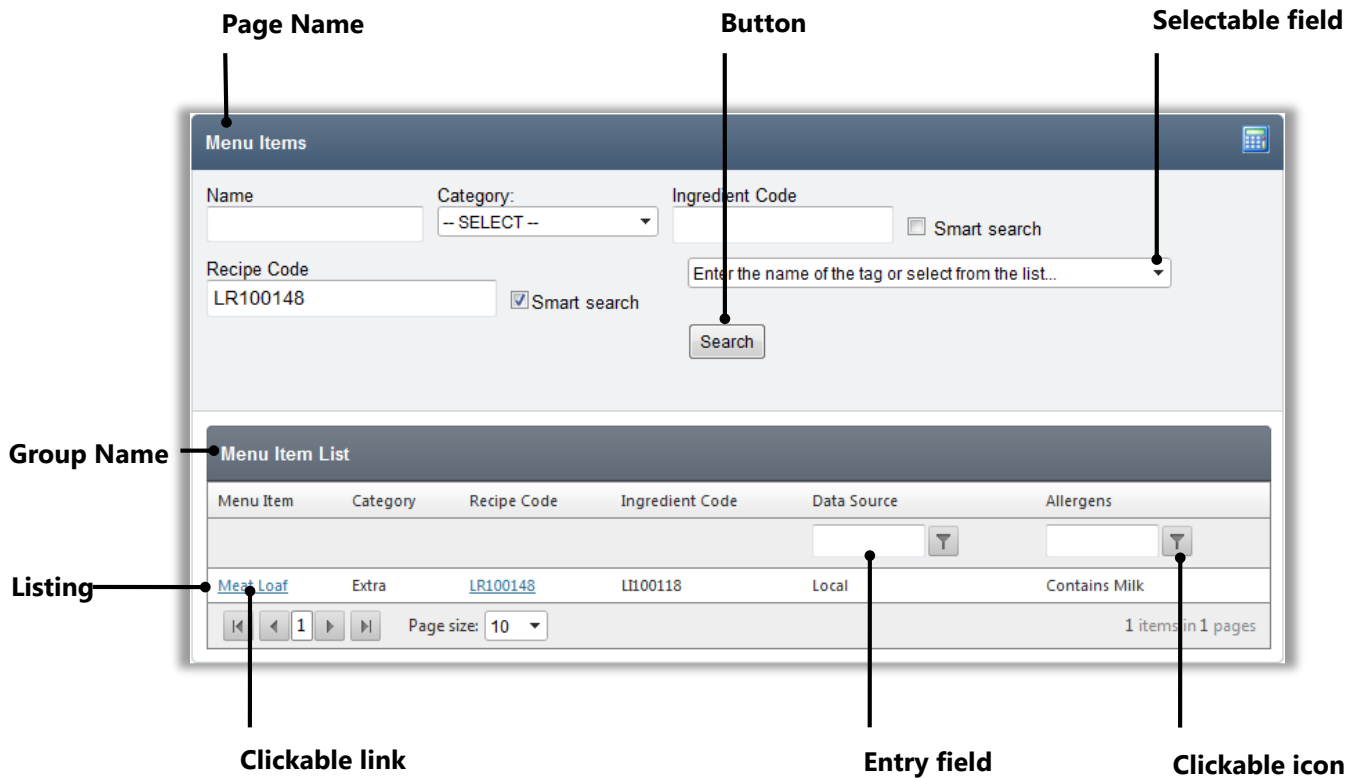
Item	Convention	Example
Button	Graphic as seen on page	Click  .
Clickable icon	Icon name in bold followed by graphic	Click <b>Calendar</b> (  ).
Clickable link	Blue, bold, italics, underlined	Click the <i><b>OrderNumber</b></i> in the <b>Order #</b> column.
Field name	Bold, <u>underlined</u> , capitalization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

## Menu and Page Conventions

### Menus






### Pages






## Icon Conventions

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

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

## Special Functions

When you see...	You can...
<input type="text" value="8/30/2010"/> 	Place the cursor in a date section, such as Month, and click the  key to increase the number or click the  key to decrease the number.





# Working with Column Data

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

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

Menu Item List								
Category	Menu Item	Recipe Code	Ingredient Code	Serving Size	Meal Contribution	Allergens	Data Source	Verified
Condiments	<a href="#">Base_Beef Base_AP_6x1lb_NAMSG_Minor's_Nestle</a>	<a href="#">SR102567</a>	SI102344	3/4 teaspoon			PDE Shared	Yes
Entrees	<a href="#">Base_Chicken Flavor No MSG Soup_12/1 lb_Nestle</a>	<a href="#">SR103517</a>	SI102939	1 portion		Contains Gluten, Milk, Soy, Wheat.	PDE Shared	Yes
Condiments	<a href="#">Base_Chicken Flavor Soup Base_Harvest Value_301</a>	<a href="#">SR104225</a>	SI102680	1 teaspoon			PDE Shared	Yes
Condiments	<a href="#">BBO Sauce Condiment</a>	<a href="#">SR100073</a>		1 serving (1/3 cup)			PDE Shared	Yes
Entrees	<a href="#">Bean Burrito</a>	<a href="#">SR100060</a>		1 burrito	1 1/2 WG 2 Meat/MA 1/4 Veg-O	Contains Gluten, Soy, Wheat.	PDE Shared	Yes
Vegetables	<a href="#">Bean Salad_Fancy Three Bean Salad_Canned_Monarc</a>	<a href="#">SR103145</a>	SI102676	1/2 cup serving	1/2 Veg-O		PDE Shared	Yes
Vegetables	<a href="#">Bean Butter in Sauce</a>	<a href="#">SR102660</a>	SI100478	1/2 cup (1/2 cup)			PDE Shared	Yes

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

-  (Ascending)
-  (Descending)

Menu Item List								
Category	Menu Item	Recipe Code	Ingredient Code	Serving Size	Meal Contribution	Allergens	Data Source	Verified
Condiments	<a href="#">Dressing_Dijon_Fat Free Honey Dijon_Ken's_4133</a>	<a href="#">SR100964</a>	SI101150	2 tablespoon			PDE Shared	Yes
Condiments	<a href="#">Dressing_Fat Free Italian Cains Foods</a>	<a href="#">SR101218</a>	SI101324	2 tablespoon			PDE Shared	Yes
Condiments	<a href="#">Dressing_Fat Free Raspberry Vinaigrette_Natural</a>	<a href="#">SR104045</a>	SI102259	1 1/2 ounces			PDE Shared	Yes
Condiments	<a href="#">Dressing_French Country</a>	<a href="#">SR101528</a>	SI101603	1 pouch			PDE Shared	Yes

# Working with List Display Controls

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

Menu Item List								
Category	Menu Item	Recipe Code	Ingredient Code	Serving Size	Meal Contribution	Allergens	Data Source	Verified
Condiments	<a href="#">Base, Beef Base, AP, 6x1lb, NAMSG, Minor's, Nestle</a>	<a href="#">SR102567</a>	SI102344	3/4 teaspoon			PDE Shared	Yes
Entrees	<a href="#">Base, Chicken Flavor No MSG Soup, 12/1 lb., Nestle</a>	<a href="#">SR103517</a>	SI102939	1 portion		Contains Gluten, Milk, Soy, Wheat.	PDE Shared	Yes
Condiments	<a href="#">Base, Chicken Flavor Soup Base, Harvest Value, 301</a>	<a href="#">SR104225</a>	SI102680	1 teaspoon			PDE Shared	Yes
Condiments	<a href="#">BBO Sauce Condiment</a>	<a href="#">SR100073</a>		1 serving (1/3 cup)			PDE Shared	Yes
Entrees	<a href="#">Bean Burrito</a>	<a href="#">SR100060</a>		1 burrito	1 1/2 WG 2 Meat/MA 1/4 Veg-O	Contains Gluten, Soy, Wheat.	PDE Shared	Yes
Vegetables	<a href="#">Bean Salad, Fancy Three</a> <a href="#">Bean Salad, Canned, Monarc</a>	<a href="#">SR103145</a>	SI102676	1/2 cup serving	1/2 Veg-O		PDE Shared	Yes
Vegetables	<a href="#">Bean, Butter, in Sauce, Canned, Monarch-D, 170283</a>	<a href="#">SR102660</a>	SI100478	1/2 cup (1/2 cup ladle)			PDE Shared	Yes
Vegetables	<a href="#">Bean, Canned, Beans, Refried, Vegetarian, 6/112, R</a>	<a href="#">SR100255</a>	SI100590	1/2 Cup (8 oz ladle)	1/2 Veg-BP		PDE Shared	Yes
Vegetables	<a href="#">Bean, Fancy Black Beans, Veg-BP</a>	<a href="#">SR100537</a>	SI100476	1/4 Cup Cooked, Drained Vegetable	1/4 Veg-BP		PDE Shared	Yes
Vegetables	<a href="#">Bean, Garbanzo (chickpea), Fancy, Canned, Monarch-</a>	<a href="#">SR102598</a>	SI100118	1/4 cup serving	1/4 Veg-BP		PDE Shared	Yes

⏪ ⏩ 1 2 3 4 5 6 7 8 9 10 ... ⏪ ⏩ Page size: 10 3345 items in 335 pages

- Click to display the first page of listings
- Click to display the previous page of listinas
- Click to display a specific page of listings
- Click to display the next page of listings
- Click to display the last page of listings
- Select a number from the **Page size:** list to change the number of listings displayed on a page
- The total number of items (listings) and the total number of pages of listings is shown

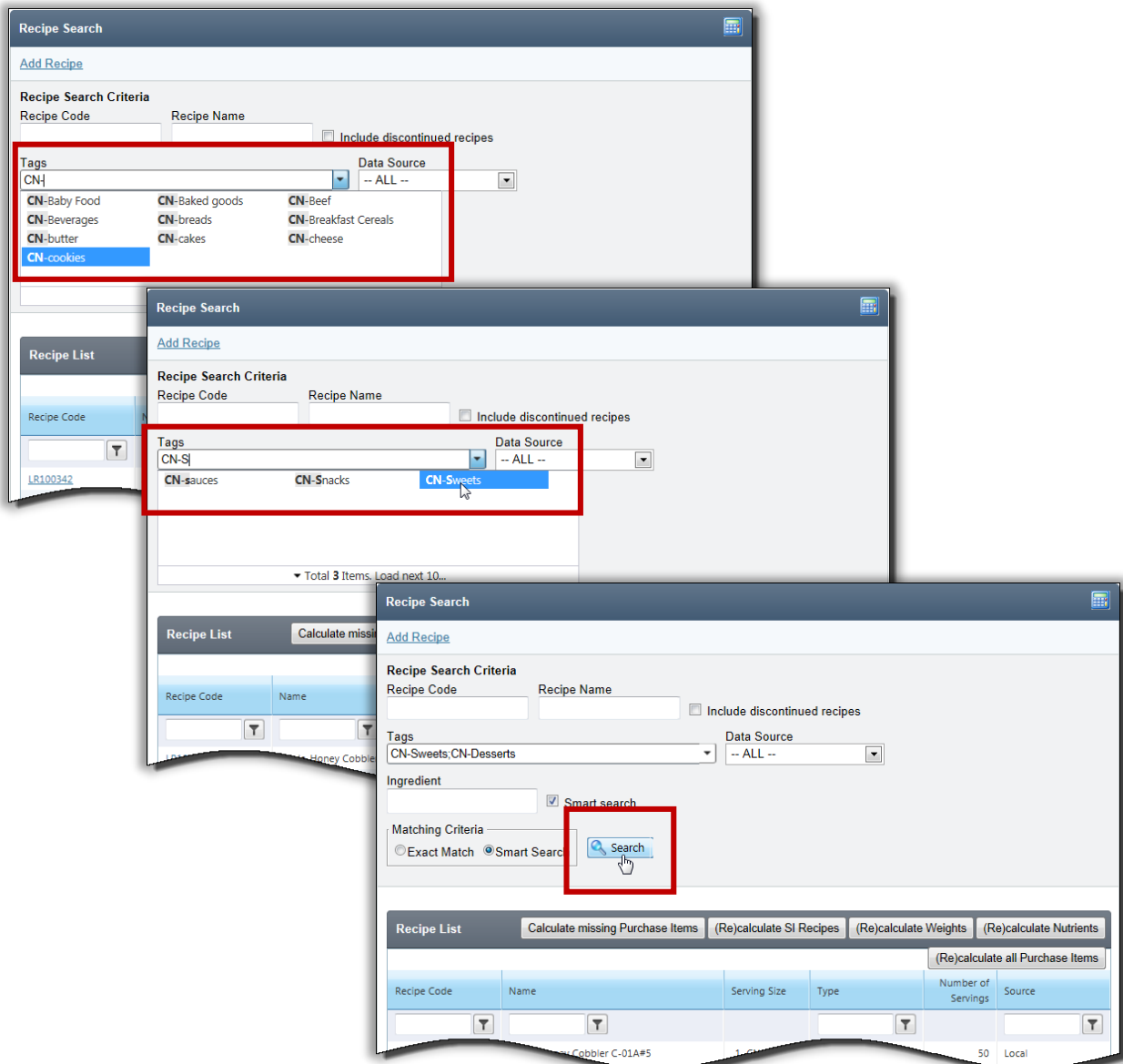
# Working with Tags

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

## To choose tags

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

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

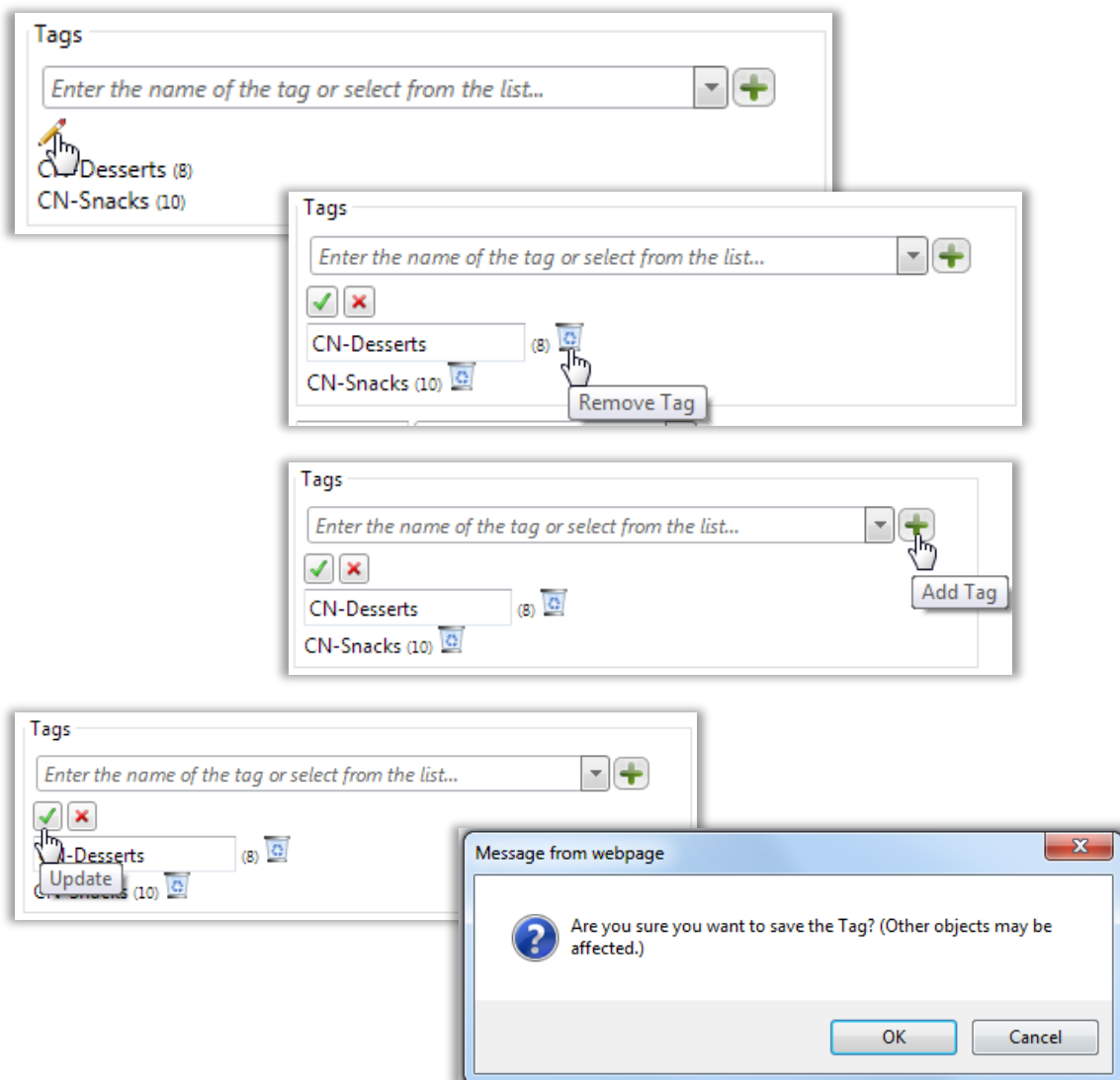


## Managing Tags for an Ingredient

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

### To manage Tags

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



# B

## Terms

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

## Terms Used with Ingredients

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

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

---

## Terms Used with Recipes

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



Term	Description
Pre-Preparation Instructions	Activities to complete before Recipe preparation begins, such as bringing Ingredients to a specific temperature before use.
Recipe Generation Type	<p>Method or process in which the recipe is used; can be either:</p> <ul style="list-style-type: none"> <li>▪ <b>Nutrition Analysis Recipe</b> – analyzed with the Yield Factor Method to provide a nutrient analysis that accounts for changes in nutrients caused by preparation and cooking. The Yield Factor Method requires that each raw RecipeIngredient be converted and entered in the Recipe as a “as consumed” or ready-to-serve (often cooked) Ingredient.</li> </ul> <p>When building this type of recipe, user selects <i>ingredients</i> on the <b>Ingredients</b> tab.</p> <ul style="list-style-type: none"> <li>▪ <b>Production Recipe</b> – includes raw Ingredients and amounts in the uncooked state, directions for producing the Recipe, and the yield and serving size as prepared. These Recipes are generally used by cooks to prepare the Recipe or to calculate how much/many raw ingredients to order.</li> </ul> <p>When building this type of Recipe, user selects <i>purchase items</i> on the Ingredients tab.</p> <ul style="list-style-type: none"> <li>▪ <b>Dual Entry Recipe</b> – recipe is used for both Nutritional Analysis and Production.</li> </ul> <p>When building this type of recipe, user selects either <i>ingredients</i> or <i>purchase items</i> on the <b>Ingredients</b> tab.</p> <ul style="list-style-type: none"> <li>▪ <b>Single Ingredient Recipe</b> – recipe is created from a single ingredient, such as using the “As Purchased” “Bagel” Ingredient to create the “Bagel” Recipe which in turn allows for creating a Menu Item to be offered for a meal service.</li> </ul> <p>The “default” Recipe type is set through the system setting: <a href="#">Default Recipe Generation Type</a> ([System] &gt; Management &gt; System Settings &gt; Menu Planning &gt; Category:Ingredients).</p>
Recipe Name	Full and complete Recipe description.
Recipe Short Name	Brief, shortened form of the full Recipe name.

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

◀ *End of Appendix* ▶

# Index

allergens.....	25	categories.....	11, 12, 14, 61, 64, 71, 153, 158, 160
Ingredients.....	25	creating.....	23
Menu Items.....	49, 125, 132	food component contributions.....	41
Recipes.....	42	Menu Lines.....	11
Broken Unit Weight.....	26	analysis.....	107
Child Nutrition recipe.....	18	Menu Templates.....	12
cost of		Menus.....	10
Menu production.....	72	publishing.....	40, 118
Recipe production.....	139, 141	modules, PrimeroEdge	
Data Source.....	10, 16, 198	Inventory.....	26, 51, 54
Ingredients.....	16	Production.....	26
Menu Cycles.....	81	nutrient analysis	
Menu Items.....	49	Menu Cycles.....	87, 109, 111
Menus.....	62	Menu Lines.....	109, 111
Purchase Items.....	52	Menus.....	74
Recipes.....	32	nutrient values.....	28
reports.....	127, 132, 136, 143	nutrients.....	24
Edible Portion value.....	26	nutrition labels.....	27
Effective Start Date.....	12	option	
Exact Match search.....	21, 33, 50	AutoCalculate.....	38
Food Component Report		Include Discontinued Ingredients.....	20
Menu Cycles.....	92, 116	Include Discontinued Menu Cycles.....	81
Menu Lines.....	116	Include Discontinued Menu Items.....	50
food components.....	75, 88, 110	Include Discontinued Recipes.....	32
HACCP Process.....	11, 29	Is Missing.....	24
Holiday Schedule.....	10, 11	Override Assigned Menus.....	102
Ingredient Code.....	28, 30	Preparation Site Item.....	40
Ingredients.....	10, 19, 26, 34, 37	Show in Summary.....	40
adding.....	22	Skip Holidays.....	100
copying.....	30	Skip Weekends.....	99
searching.....	21	Use All Menus.....	101
item weight in Production, show.....	26	ParentOnline.....	40, 118
links		Preferred Measurement, setting.....	23
Purchase Item.....	54	preparation	
Stock Item.....	54	method.....	26, 55
listings		time.....	29
Menu Item List.....	49	Projected Meal Counts.....	14, 64, 70, 158, 160, 164
Menu List.....	62	Purchase Items.....	26, 34, 36, 37, 53, 54, 55, 56, 57
Purchase Items.....	52	recipe tips.....	29
Recipe List.....	32	recipe types.....	32, 34, 37, 42, 217
Meal Pattern.....	10	Recipes.....	10
Menu Calendar report.....	15, 40, 122, 129, 130	active.....	32
Menu Calendars.....	10, 11, 14, 62, 97, 99, 100, 101, 102, 105, 106, 178	adding.....	34
assigning to.....	65	allergens.....	42
editing.....	66	copying.....	44
page.....	40	details.....	35
Menu Cycles		Dual Entry.....	32, 34, 37, 217
Nutrient Analysis Report.....	89	generating report.....	47
Nutrient Summary Report.....	89	inactive.....	32
Menu Items.....	29, 40	Menu Item.....	40
allergens.....	15, 49	nutrients.....	38
		Nutrition Analysis.....	32, 34, 37, 217

Production.....	32, 34, 37, 43, 217
scaling.....	42
Single Ingredient (SI).....	13, 19, 29, 32, 217
strict batching.....	35
reports	
Acceptability Factor.....	124
Allergen Chart.....	126
Food Component Report (Menu Cycle).....	92
Food Component Report (Multi-Line Analysis).....	116
Food Component Report (Weekly Nutrient Analysis) .....	149
Ingredient List.....	19, 28, 128
Menu Calendar.....	130
Menu Calendar Nutrients.....	131
Menu Costing.....	72
Menu Item Nutrients.....	133
Nutrient Standards.....	135
Nutrition Report.....	38, 76
Nutrition Report (Menu Cycle).....	89
Nutrition Report (Multi-Line Analysis).....	111
Nutrition Report (Weekly Nutrient Analysis).....	147
Nutrition Summary Report (Menu Cycle).....	91
Nutrition Summary Report (Multi-Line Analysis)..	114
Nutrition Summary Report (Weekly Nutrient Analysis).....	148
Recipe Book.....	137
Recipe Costing.....	140
Recipe Materials Report.....	141
Recipe Nutrition.....	144
Recipe report.....	47
Scale Recipe by Batch.....	42
Scale Recipe by Servings.....	42
Weekly Nutrient Analysis.....	146
searching for	
Ingredients.....	21
Menu Cycles.....	82
Menu Items.....	50
Menu Templates.....	157
Menus.....	63
Recipes.....	33
Serving Groups 10, 12, 23, 64, 70, 71, 152, 156, 158, 160, 193, 196	
serving size, Menu Item....	23, 24, 34, 38, 40, 69, 123, 217
exceptions.....	41
Site Configuration.....	12
Site Group.....	10, 11
Smart Search search.....	19, 21, 31, 33, 50
Standard Menu Items.....	12, 14, 158, 163
Standard Nutrients footer..	15, 74, 76, 87, 89, 91, 92, 109, 111, 114, 116, 145, 146
stock item.....	26
strict batching, for recipes.....	35
substitutions, M/MA or Grains.....	86
system setting	
Default Nutrients Option.....	76, 89, 111
Menu Cycle – Maximum Days per Cycle.....	83
Menu Items – Default Maximum Carryover Days ...	40
Menus – Include Standard Menu Items by Default	12
Recipes – Auto Generate Recipe Codes.....	30
Recipes – Display Pictures in Recipes.....	36
Recipes – Display Pictures in Reports .....	47, 136, 137
uploading	
supporting documents,ingredients.....	27