

# CHEAT SHEET: CONFIGURATION

## QUICK GUIDE: CONFIGURATION HELPER TOOL

1. Find the “Configuration Helper Tool” under “Training” on the MENU Module web page on SquareMeals.org. Go to <http://www.squaremeals.org/>
2. Access and use the “Configuration Helper Tool” to help you tackle important steps that you need to take before using MENU Module.

## QUICK GUIDE: CONFIGURING SETTINGS IN MENU MODULE

### System Configuration: Assign Roles to Users

Click on “System” tab. Click on “Sites and Users” folder. Click on “Users” sub folder. Assign role to user by clicking user name, setting the “Organization Level” to “District,” scrolling down page to select role, and clicking on “Update User” button.

### Menu Planning Configuration: Create Menu Lines

Click on “Menu Planning” tab. Click on “Configuration” folder. Click on “Menu Lines” sub-folder. Create menu lines by typing name of line, and clicking on “Add” button.

### Menu Planning Configuration: Assign Menu Lines to Sites

Click on “Menu Planning” tab. Click on “Configuration” folder. Click on “Site Configuration” sub-folder. Click on a site and select “Meal Type,” “OVS Default,” (if applicable) and “Menu Lines” for the site. Click on “Insert” hyperlink.

### Menu Planning Configuration: Holiday Schedule

Click on “Menu Planning” tab. Click on “Configuration” folder. Click on “Holiday Schedule” sub-folder. To add holiday record, click on “Add new record.” Click on calendar icons to select beginning and end date of holiday. Enter description of holiday and select (or do not select) “Allow Deliveries” box. Click on “Insert” to save holiday.

### Menu Planning Configuration: Menu Item Categories

Click on “Menu Planning” tab. Click on “Configuration” folder. Click on “Menu Item Categories” sub-folder. Optional: Add additional “Menu Item Categories” by typing name of additional menu item category under “Category Description.” Click on “Add” button to save.

### Menu Planning Configuration: HACCP and CCP

Click on “Menu Planning” tab. Click on “Configuration” folder. Click on “HACCP Configuration” sub-folder. Optional: Add “HACCP Processes” or “HACCP CCPs” by clicking on “Add new record” button under each. Type or select information. Click on “Insert” hyperlink to save.

**The information above does not include updating system site settings, creating new roles, or configuring sites or site groups. Refer to the *Configuration User's Guide* for this information.**

## QUICK GUIDE: WHAT IS CONFIGURATION?

Configuration allows you to provide MENU Module with information needed to make the system work for your district’s needs. Districts should configure MENU Module before using the system for creating menus and recording production.

**Configuration is divided into two parts for MENU Module users.**

- System Configuration
- Menu Planning Configuration

**The steps needed to configure system and menu planning settings in are as follows.**

- System Configuration: Update Site and USDA Site Types
- System Configuration: Send Site to School Café
- System Configuration: Roles and Permissions
- System Configuration: Assign Roles to Users
- Menu Planning Configuration: Menu Lines
- Menu Planning Configuration: Sites
- Menu Planning Configuration: Site Groups
- Menu Planning Configuration: Holiday Schedule
- Menu Planning Configuration: Menu Item Categories
- Menu Planning Configuration: HACCP and CCP

## QUICK GUIDE: SYSTEM ROLES IN MENU MODULE

**Basic Role:** Menu Module automatically assigns the “Basic Role,” which comes with zero permission, to all users (except for the Child Nutrition Director) by default.

**Child Nutrition Director:** The “Child Nutrition Director” role possesses all “Menu Planning,” “Production,” “System,” and “Team Work” permissions. In addition, the “Child Nutrition Director” role is responsible for assigning roles (other than the “Basic Role”) to their staff.

**Manager:** The “Manager” role can plan, record, report, and review in production. Consider training the “Manager” role to access only their site.

**Menu Planner:** The “Menu Planner” role can configure menu planning settings, manage ingredients, recipes, and menus, and generate menu reports. The “Menu Planner” role shares similar production access as the “Manager” role and can make announcements to the team.

**Supervisor:** The “Supervisor” role shares similar production access as the “Manager” role. In addition, the “Supervisor” role can make announcements to the team and record staff training. Consider training the “Supervisor” role to access only certain sites.



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