OTHER RESOURCES

In addition to the User’s Guide: Configuration, you may use the following resources to learn more about “Configuration” in MENU Module.

PRIMERO EDGE’S MENU PLANNING USER MANUAL
• Page 9-16
CONFIGURATION HELPER TOOL: SITE SELECTION HELPER

**Best Practice:** Follow a logical sequence for switching over to MENU Module.

**FAQ**

What is the “Site Selection Helper” and how do I use it?

The “Site Selection Helper” helps you decide which sites to transition to MENU Module first.

The questions in “Site Selection Helper” help you think about each site and how launching MENU Module may affect each site and your overall success.

Over time, you will transition all of your sites to MENU Module. Use the “Site Selection Helper,” to help you make a “game plan” for how to make the switch!

1. Find the “Configuration Helper Tool” under “Training” on the MENU Module web page on SquareMeals.org.

2. Locate the “Site Selection Helper” tab at the bottom of the tool (second tab).

3. Use the “Directions” and “Example” and the “Questions Guide: Site Selection Helper” (following pages) to fill out the tool.


**QUESTIONS GUIDE: SITE SELECTION HELPER**

**Note:** Use the information below as a guide to the “Site Selection Helper” questions.

**CONFIGURATION HELPER TOOL: SITE SELECTION HELPER**

**Question: What school types do you operate and how many?**

This question helps you determine the “school type” with the greatest representation in your district.

**Note:** Starting MENU Module at two or more sites at one time will require more planning and management, especially during production.

**CONFIGURATION HELPER TOOL: SITE SELECTION HELPER**

**Question: Who are your best five site managers [for each school type]? What site does he or she work at?**

This question helps you consider the motivation and skill level of your site managers. Consider the following questions:

- Is this site manager knowledgeable about the meal patterns?
- Does this site manager understand how to use CN labels?
- Does this site manager complete production with few mistakes?
- Does this site manager possess leadership skills?
- Does this site manager possess training skills?
- Does this site manager possess a positive attitude about new things?
- Does this site manager turn in complete and correct food production records?
- Does this site manager understand how to use the production record to plan and forecast for future meals?

**Best Practice:** Partner with site managers to help you make the switch to MENU Module. Involve site managers as early as possible. Site managers can help you to “divide and conquer” data entry, train staff, and implementation of MENU Module. Site managers can encourage “buy in” of MENU Module for other staff, save you time, and become experts on the production side of MENU Module.
QUESTIONS GUIDE: SITE SELECTION HELPER

CONFIGURATION HELPER TOOL: SITE SELECTION HELPER

Question: How many serving lines operate at this site?

This question refers to the number of meal lines the site operates during the busiest meal period. For example if the site operates one meal line at breakfast and two meal lines at lunch, you should answer, “2.”

Tip: Consider transitioning the sites with several meal lines to MENU Module later and beginning with the sites with fewer meal lines.

CONFIGURATION HELPER TOOL: SITE SELECTION HELPER

Question: Is a printer available at the site?

This question helps you to consider how the presence or absence of a printer can affect meal production. While not mandatory, sites with printers make it possible for site managers to print what they need (recipes, technician reports, food production records, etc.) directly from MENU Module.

Checkpoint: So far, you have explored how to use the answers to the first four questions in the “Site Selection Helper” to help you make decisions about which sites transition to MENU Module first. The following example illustrates one possible outcome to these questions:

“I have four elementary schools (one line each), with very strong site managers and printers available.”

How does the example above impact decision making for MENU Module? Are these sites good candidates for launching MENU Module?

Directions: Write your thoughts in the space below.
QUESTIONS GUIDE: SITE SELECTION HELPER

CONFIGURATION HELPER TOOL: SITE SELECTION HELPER
Question: Does the site share a common menu cycle with other sites in this row?

This question focuses on identifying sites that share a single/same menu cycle.

Sharing a single/same menu cycle means that sites share an exact copy of one full menu cycle. Identifying sites that share a common menu cycle can help to eliminate building multiple menus when first switching to MENU Module. This can help you reduce juggling too much information while trying to learn a new software program. Keeping your stress levels low early on will help you move forward.

CONFIGURATION HELPER TOOL: SITE SELECTION HELPER
Question: Do any of the sites purchase from the same Co-op? If so, list the Co-op’s name.

This question identifies if sites purchase from a Co-op, and if so, which one. Many Texas Co-ops have provided Co-op ingredient data, available in the “TDA Shared” database.

CONFIGURATION HELPER TOOL: SITE SELECTION HELPER
List the names of the sites with the most favorable characteristics, for which you can also access the majority of the information listed below.

This question helps you determine the sites with the most complete and accessible information in order to plan menu items and menu cycles.

Note: First review the list of information needed for each menu item (the following question). After reviewing the following question, record the site(s) for which you can access the majority of the needed information.
QUESTIONS GUIDE: SITE SELECTION HELPER

CONFIGURATION HELPER TOOL: SITE SELECTION HELPER

Can you collect the information below?

This question summarizes the menu item information you need to make menu cycles in MENU Module:

- **Ingredient list**: The ingredient list should include a comprehensive list of exact ingredients used including details such as case sizes, nutrient information, and manufacturer codes.

- **Ingredient purchase units (whole and broken)**: Invoices, recipes, or other documentation may include specific information about the whole ingredient unit (such as a case) and the broken ingredient unit (such as each).

- **Weight of each ingredient unit**: Invoices, recipes, or other documentation may include specific information about the weight of each ingredient whole and broken unit.

- **USDA commodity ingredient list**: A “USDA commodity ingredient list” should provide a list of ingredients from your USDA Foods (commodity foods) inventory.

- **Ingredient manufacturer**: Invoices may provide information about the manufacturer of a specific ingredient.

- **Ingredient purchase price**: Invoices or other documentation may allow you to access the purchase price of ingredients.

- **Recipes**: Recipes should include recipes for all menu items in your menu cycles. Recipes include recipes for single ingredient menu items, such as pre-package items, and for recipes within recipes, such as a marinara sauce recipe that corresponds to a pizza recipe.

- **Menu item serving sizes**: Recipes and should include information about the serving size and portioning tool for menu items for each age/grade group.

- **Projected meal counts**: Past Food Production Records can help you determine projected meal counts.

- **Recipe HACCP & CCP information**: Recipes or other documentation should include HACCP and CCP processes and procedures used for recipes.

- **Component contribution information for menu item(s)**: Recipes and ingredient documentation can help you determine each menu item’s component contribution to the USDA meal pattern.
FAQ

Now that I have completed the “Site Selection Helper,” how do I make a decision about which sites to transition to MENU Module first?

Review your completed “Site Selection Helper.” Do any sites lack important characteristics needed to launch MENU Module successfully? Do you want to remove these sites from consideration?

Which sites possess promising characteristics (for example, sites with good site managers, thorough documentation, menu cycles in common with other sites, etc.)? Launch the sites where you are likely to have the greatest success first.

While you may want all sites to launch at once, keep in mind that using MENU Module for the first time may present a challenge. Start with less challenging sites first. Over time, you can transition all of your sites to MENU Module.
FAQ

What is the “MENU Module Access Helper” tab and how do I use it?

The "MENU Module Access Helper" tab can help you record and track the important steps for district employees that need access to MENU Module.

Decide which staff need MENU Module access for planning, production, and reporting purposes. Track staff’s progress getting access and record the type of access each staff member needs.

Note: Remember to submit an FND-101 for each district employee needing access to MENU Module. Everyone must submit an FND-101 requesting access to MENU Module, even those currently using TX-UNPS for other purposes.

1. Find the “Configuration Helper Tool” under “Training” on the MENU Module web page on SquareMeals.org.

2. Locate the “Menu Module Access Helper” tab at the bottom of the “Configuration Helper Tool,” third tab.

3. Use the “Instructions” and “Example” to fill out the tool.
CONFIGURATION HELPER TOOL: CONFIGURATION HELPER

FAQ

What is the “Configuration Helper” tab and how do I use it?

The "Configuration Helper" tab helps you plan for configuring MENU Module settings by collecting all of the needed information in one place.

Use the "Configuration Helper" tab to collect unique district and site characteristics before attempting to configure MENU Module settings.

1. Find the “Configuration Helper Tool” under “Training” on the MENU Module web page on SquareMeals.org.

2. Locate the “Configuration Helper” tab at the bottom of the “Configuration Helper Tool,” fourth tab.

3. Use the “Instructions” and “Example” to fill out the tool.

4. Use the tab to help you configure your settings in MENU Module.
FAQ

What is Configuration?

MENU Module works to gather specific district and site information so that when you use MENU Module, the system works for your unique situation. This customization process is called configuration.

Configuration is divided into two parts for MENU Module users.

- System Configuration
- Menu Planning Configuration

The two types of configuration occur in two different areas of the system.

The steps needed to configure system and menu planning settings in MENU Module are covered in the Configuration User’s Guide as follows.

- System Configuration: Update Site and USDA Site Types
- System Configuration: Roles and Permissions
- System Configuration: Assign Roles to Users
- Menu Planning Configuration: Sites & Site Groups
- Menu Planning Configuration: Menu Lines
- Menu Planning Configuration: Holiday Schedule
- Menu Planning Configuration: Menu Item Categories
- Menu Planning Configuration: HACCP and CCP
SYSTEM CONFIGURATION: UPDATE SITE AND USDA SITE TYPE

1. Click on the “System” tab.

2. Click on the “Sites and Users” folder.

3. Click on the “Sites” sub-folder.

Notice the search fields at the top of the page where you can filter by “Site Type,” “Site Code,” “Site,” “Active Status,” Feeding Status,” and/or “Reimbursement Status.”

Note: Site names are pre-populated from TX-UNPS.

4. Let the fields display the word “ALL” and click on the “Apply” button.
5. Click on each site hyperlink.

![Website Screenshot]

6. For each site that you click on, correct any mistakes for “Site Type” and “USDA Site Type.”

![Website Screenshot]

7. Click on the “Save” button (at the bottom of the page.)

![Website Screenshot]
8. Click on the “Configuration” tab for that site.

9. Designate each site as a “Feeding Site” (If the site is not a “Feeding Site,” select a “Food Preparation Site” for the site.

   A “Feeding Site” means that the site prepares and serves the food prepared onsite.

   The “Food Preparation Site” is the site where the food for that site comes from if it is not a feeding site.

10. Click on the box to check the box labeled “Send site to SchoolCafé” if you would like to publish the menus that you send to production at this site to the SchoolCafé app.

11. Click on the “Save” button (at the bottom of the page.)
SYSTEM CONFIGURATION: ROLES AND PERMISSIONS

1. Click on the “System” tab.

2. Click on the “Sites and Users” folder.

3. Click on the “Roles” sub-folder.
   Notice that there are multiple roles available to select.
   - Basic Role
   - Child Nutrition Director
   - Manager
   - Menu Planner
   - Supervisor

Note: Read the Quick Guide: Roles in MENU Module (pg. 17), for details on the permissions granted to each role in MENU Module.

4. Review the permissions for each role by clicking on the “Role Description.”
   Different permissions give access to specific tasks in MENU Module. Use permissions to grant access to users, and allow users to only access tasks that are specific to their needs. For example, a site manager only needs access to production.

5. Optional: Create a new role by clicking on the “Add Role” button on the right hand side of the page.
   Use the pre-programmed roles as much as possible. Only create a new role if necessary!
6. Type the name of the new role that you need to create in the text box labeled “Role Description.”

7. Select “District” as the “Organization Level” for the Role.
   While MENU Module displays “Site,” “Area,” or “District” as options, every role that districts create in MENU Module “resets” to the “District” “Organization Level” and “Basic User” role daily. There is currently no way around this. Train kitchen managers and supervisors to access only certain sites in MENU Module.
   - “District” roles can access all sites in the district.

8. Scroll down and select “Role Permissions” by clicking on the arrows next to each “Role Permissions” Module (“Menu Planning,” “Production System,” and “Team Work”) and selecting the boxes next to the permissions for that role.

9. Click on the “Create New Role” button.
QUICK GUIDE: SYSTEM ROLES IN MENU MODULE

Basic Role

MENU Module automatically assigns the “Basic Role” to all users (except for the “Child Nutrition Director”) imported from TX-UNPS. A user with a “Basic Role” possesses zero permission in MENU Module and must receive a different role assignment from the “Child Nutrition Director.”

Child Nutrition Director

The district employee listed as “Child Nutrition Director” in TX-UNPS automatically receives the “Child Nutrition Director” role in MENU Module through the daily user import process from TX-UNPS. The “Child Nutrition Director” role possesses all “Menu Planning,” “Production,” “System,” and “Team Work” permissions. With these permissions, the “Child Nutrition Director” can manage and change menu planning, production, and system settings, make announcements, manage sites, manage users (including roles, training and reports), and more. 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 production. You may train staff assigned the “Manager” role to access only their site.

Menu Planner

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

Supervisor

The “Supervisor” role shares a similar role as the “Manager” role. In addition, the “Supervisor” role can make announcements to the team and record staff training. You may train staff assigned the “Supervisor” role to access only certain sites.
SYSTEM CONFIGURATION: ASSIGN ROLES TO USERS

1. Click on the “System” tab.

2. Click on the “Sites and Users” folder.

3. Click on the “Users” sub-folder.
   The list of users displayed here has been imported from TX-UNPS data.
   
   Remember that you must submit an FND-101 for each district employee that needs access to MENU Module.

4. To edit each user role (only allowed by the “Child Nutrition Director” role), click on the user name hyperlink.
5. Select “District” as the “Organization Level.”

6. Scroll down the page to “Roles,” and select the box next the desired role.

7. Click on the “Update User” button.

**Notice that when you return to the “Users” screen, the system has updated the user role.**
MENU PLANNING CONFIGURATION: SITES & SITE GROUPS

Use the steps that follow to assign a site group to a site in MENU Module

1. Click on the “Menu Planning” tab.

2. Click on the “Configuration” folder.

3. Click on the “Site Configuration” sub-folder.
   A list of all sites in the district will display on this page. This list populates from the sites listed in the “Sites” subfolder in the “Sites and Users” folder of the “System” tab.
   
   Notice that in the screenshot below, all, but one, of the sites has been configured. When doing this for the first time, none of the district sites will be configured.

4. To configure a site, click on the pencil icon in the same row as the site.
   Notice that the system generates a “Site Name,” “Site Group,” and “Effective Date” field.

5. Select a “Site Group” from the drop down list.
6. **Click on the calendar icon to set an effective date.**

7. **Click on the “Update” link to save the site configuration.**

Notice that in the “Site Group” column, the site now lists the “Site Group that you selected.”

8. **Repeat this action for each site until you have assigned all sites to a “Site Group.”**

### FAQ

**What is the purpose of assigning sites to site groups?**

In MENU Module, you must assign every site using MENU Module to a “Site Group.” MENU Module will not allow you to assign a menu to a site if the site is not part of a “Site Group.”

Assigning sites to “Site Group(s)” also allow you to assign menus and menu cycles to multiple sites at one time. For example, if all elementary schools use the same menu, you can assign the menus to all elementary schools in the “Site Group,” “Elementary Schools,” at one time.
Use the steps that follow to view and create site groups to MENU Module if necessary:

1. Click on the “Menu Planning” tab.

2. Click on the “Configuration” folder.

3. Click on the “Site Groups” sub-folder.
   The site group information will display on this page.

4. Click on the arrow to the left of each site group description to expand the list of sites belonging to each site group.
   The screenshot below displays what it looks like when you expand the list of sites under each “Site Group” description.
5. **To add a “Site Group,”** click on the “Add new Site Group” plus box. *Notice that the system generates a “Description” and “Data Source” field.*

6. **Enter a name for the “Site Group”** in the “Description” box.

7. **Click on the “Insert” link.**

Notice that the system adds the “Site Group” to the list of site groups. *Use the pencil icon to edit the site group and the trash can icon to delete the site group. Notice that you can only edit and delete the site groups that you created.*
MENU PLANNING CONFIGURATION: MENU LINES

FAQ

Why do I have to configure menu lines in MENU Module?

Configuring menu lines allows users to assign menus and menu cycles to the appropriate lines at their sites.

Configuring menu lines in MENU Module is a two-step process.

• First, you must create menu lines.
• Then, you must assign menu lines to each site

Part One: Create Menu Lines

1. Click on the “Menu Planning” tab.

2. Click on the “Configuration” folder.

3. Click on the “Menu Lines” sub-folder.
   * A list of all menu lines for the district will display on this page.

4. Create additional menu lines by typing the name of the line, and clicking on the “Add” button to the right of the text box.
Part Two: Assign Menu Lines to Sites

1. Click on the “Menu Planning” tab.

2. Click on the “Configuration” folder.

3. Click on the “Site Configuration” sub-folder.
   *In the “Status” box, you can search for “Configured” or “Not Configured” sites.*

4. Click a site from the list.
   *This will cause three fields, “Meal Type,” “OVS Default” and “Menu Lines” to appear.*
5. Select a “Meal Type” (“Breakfast,” “Lunch,” “Snack,” or “Supper”) from the drop down box.

6. Check the “OVS Default” box if the site operates Offer vs. Serve for that “Meal Type.”

7. Select the “Menu Line(s)” for that “Meal Type.”

8. Click on the “Insert” hyperlink to save the selections.

9. Repeat until you have selected all “Meal Type(s)” and “Menu Lines” for each site.
MENU PLANNING CONFIGURATION: HOLIDAY SCHEDULE

FAQ

Why should I configure the holiday schedule in MENU Module?

Configuring the holiday schedule prevents users from assigning menus to days that the district does not offer meal service.

1. Click on the “Menu Planning” tab.

2. Click on the “Configuration” folder.

3. Click on the “Holiday Schedule” sub-folder.

4. Click on the “Add new record” plus box.
5. Click on the calendar icon next to the “From” and “To” text boxes.

6. Select the beginning and end date of the school holiday on each calendar icon.

7. Click on the “Description” field and enter the description of the holiday. You may enter Thanksgiving, Spring Break, Staff Work Day, etc.

8. Optional: Click on the “Allow Deliveries” check box if vendors may make deliveries during this holiday.

9. Click on the “Insert” link to save the holiday.

10. Repeat for additional holidays.
**MENU PLANNING CONFIGURATION: MENU ITEM CATEGORIES**

**FAQ**

What does configuring “Menu Item Categories” do?

Configuring “Menu Item Categories” allows you to use and create categories that make finding menu items easier when creating menus. Try to work with the existing “Menu Item Categories” first and only create new menu item categories if necessary. Do not create duplicate “Menu Item Categories.”

1. Click on the “Menu Planning” tab.

2. Click on the “Configuration” folder.

3. Click on the “Menu Item Categories” sub-folder.

*The existing “Menu Item Categories” will display on this page.*
4. Optional: Add additional “Menu Item Categories” by typing the name of the additional menu item category in the field labeled “Category Description.”

You can change the order of how the categories appear on your menus by inserting numbers into the “Display Order” field.

Tip: Use the pre-programmed “Menu Item Categories” as much as possible. Only create a new menu item category if necessary.

5. Click on the “Add” button to save the new “Menu Item Category.”
6. Optional: To edit “Menu Item Categories,” click on the pencil icon to the right of the menu item category that you want to edit.

   a) Make the changes to the “Description” or “Display Order” as needed.

   b) Click the check mark icon to save or click on the “X” icon to cancel without saving changes.

<table>
<thead>
<tr>
<th>Menu Item Categories</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
</tr>
<tr>
<td>A la Carte-TDA</td>
</tr>
<tr>
<td>Condiment-TDA</td>
</tr>
<tr>
<td>Entrée-TDA</td>
</tr>
<tr>
<td>Entrée/Combo-TDA</td>
</tr>
<tr>
<td>Fruit-TDA</td>
</tr>
<tr>
<td>Grain-TDA</td>
</tr>
<tr>
<td>Meat/MA-TDA</td>
</tr>
<tr>
<td>Milk-TDA</td>
</tr>
<tr>
<td>Training Test</td>
</tr>
<tr>
<td>Vegetable-TDA</td>
</tr>
</tbody>
</table>
FAQ

What does configuring “HACCP and CCP” do?

MENU Module allows you to insert pre-configured Hazard Analysis Critical Control Points (HACCP) and Critical Control Points (CCP) into recipes to give production staff instructions that prevent foodborne illness. Try to work with the existing “HACCP Processes” and “HACCP CCPs” first and create new “HACCP Processes” and “HACCP CCPs” if necessary.

1. Click on the “Menu Planning” tab.

2. Click on the “Configuration” folder.

3. Click on the “HACCP Configuration” sub-folder.
   The existing “HACCP Processes” and “HACCP CCPs” will display on this page.
4. Optional: Add additional “HACCP Processes” by clicking the plus button next to “Add new record” in the fields under “HACCP Processes.”
   a) Type in the name of the process in the text box next to “Process Description” and the “Short Name” in the text box next to “Short Name.”
   b) Click on the “Insert” link to save the HACCP process.
   c) Click on the pencil icon to the right of the entry to edit the HACCP process and the trashcan icon to discontinue the entry.
5. **Optional: Add additional “HACCP CCPs” by clicking the plus button next to “Add new record” in the field under “HACCP CCPs.”**

   a) Type in or select the information for all of the blank fields.
   b) Click on the “Insert” link to save.
   c) Click on the pencil icon to the right of the entry to edit and the trashcan icon to discontinue the entry once saved.
TEXAS DEPARTMENT OF AGRICULTURE
COMMISSIONER SID MILLER

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