OTHER RESOURCES

In addition to the User’s Guide: Ingredients, you may use the following resources for more information on “Ingredients” in MENU Module.

PRIMERO EDGE’S MENU PLANNING USER MANUAL
- Page 17-28
- Page 127-128

PRIMERO EDGE VIDEO TRAINING LIBRARY
- 1- Ingredient Search Filters
- 2- Ingredient Search Tags
- 3- Create a New Ingredient
- 4- Adding Ingredient Allergens
- 5- Using the Buying Guide Tab/Create a Stock Item
- 6- Copying a Shared Ingredient
SEARCHING FOR INGREDIENTS

1. Click on the “Menu Planning” tab.

2. Click on the “Ingredients” folder.

3. Click on the “Ingredients” subfolder.

4. Enter or select search criteria.
   View the “Quick Guide: Ingredients Search Criteria” on the next page for more detailed information about search criteria.

5. Click on the “Apply” button.
QUICK GUIDE: INGREDIENT SEARCH CRITERIA

**Ingredient Code:** Enter the “Ingredient Code” to find an ingredient with a specific code. “Ingredient Code”(s) are automatically assigned by the system when a user creates an ingredient.

**Ingredient Name:** Enter the “Ingredient Name” that describes the ingredient. You may enter a general “Ingredient Name,” such as “tortilla,” or a specific “Ingredient Name,” such as “Sunshine Whole Wheat Tortillas.”

**Commodity/Recipe Code:** Enter the “Commodity/Recipe Code” to find an ingredient with a specific USDA or manufacturer’s code, or another similar code. Not all ingredients contain a “Commodity/Recipe Code.”

**Manufacturer/Brand:** Enter the “Manufacturer/Brand” to find ingredients with a specific manufacturer or ingredient brand.

**Product Code:** Enter the “Product Code” to search for an ingredient with a specific product code.

**Stock Item #:** Enter the “Stock Item #” to search for an ingredient with a specific number assigned to the stock item linked to the ingredient.

**Data Source:** Select a “Data Source” from the drop down box to search for an ingredient in a specific database.

**Show Only Texas Grown:** Select the “Show Only Texas Grown” box to search ingredients designated as local Texas ingredients.

**Tags:** Enter “Tags” (keywords users add to ingredients [or recipes, menus, etc.]) to quickly find ingredients tagged for a specific purpose.

**Include Discontinued Ingredients:** Select the “Include Discontinued Ingredients” box if you need to view discontinued ingredients.

**Matching Criteria:** Select “Smart Search” to find ingredients that contain any part of the letters, numbers, or word sequence for that ingredient. Select “Exact Match” for exact matches only (including punctuation marks, capitalization, word sequence, numbers, etc.).

**Apply:** Select “Apply” to search for an ingredient filtered by the information you have entered and/or selected in the ingredient search criteria.

**Reset:** Select “Reset” to clear all selections and information entered in the search criteria.
SEARCHING FOR INGREDIENTS: EXISTING DATABASES

MENU Module includes several databases for storing ingredients (the databases also store recipes, menus, etc.).

- **Local:** Each district’s “Local” database contains district-entered ingredients and ingredients that the district copies to their “Local” database from other databases.

- **Child Nutrition Database:** The “Child Nutrition Database” includes more than 10,000 ingredients including many ingredients found in USDA recipes.

- **Cybersoft:** The “Cybersoft” database includes less than 50 unique ingredients.

- **TDA Shared:** The “TDA Shared” database includes ingredients listed on Co-op bids across Texas and contains more than 5,000 ingredients.

Read pg. 16, “Data Sources,” of the MENU Planning User Manual found in Amigo for more information on “Data Source(s).”
SEARCHING FOR INGREDIENTS

**Best Practice:** Make a list of all of the ingredients, used in your recipes, that you have purchased or plan to purchase before starting your ingredient search.

**Best Practice:** Collect nutrition and crediting information such as Nutrition Facts labels, Child Nutrition (CN) Labels, and Product Formulation Statements from the Manufacturer, before searching for and entering ingredients into the system.

**Best Practice:** Search the “TDA Shared” database and the “Child Nutrition Database” for ingredients and stock items that you can use to reduce manual entry of ingredients into the system.

**Best Practice:** Identify your staple food ingredients such as fruits and vegetables, raw protein, dry beans, plain cereal grains, and more. Staple food ingredients contain a standard of identity and you can use staple ingredients, found in MENU Module’s non-local databases, instead of creating new ingredients.

**EXAMPLE:**

See the identified staple ingredients from the ingredients listed on the day’s menu below. Remember that staple ingredients contain a standard of identity, meaning that, regardless of brand, staple ingredients should not vary much.

- **Chicken strips with orange sauce**
- **Beef patty dipper w/teriyaki and soy**
- **Oriental vegetable blend, frozen**
- **Baby lima beans, dried**
- **Bananas, fresh**
- **Grapefruit sections, canned, juice pack**
- **Brown rice, long-grain, raw**
- **1% Plain milk**
- **Fat free chocolate milk**

You may wonder why fat free chocolate milk is not a staple ingredient if plain milk is. Remember that chocolate milk is sweetened and that brands of chocolate milk can vary in sugar content. Also, remember that MENU Module’s non-local databases (especially the “TDA Shared” database) include many ingredients that you already use. Search for non-staple ingredients in MENU Module’s existing databases!
INGREDIENT SEARCH SHORTCUTS

- Double check your spelling if you can not find an ingredient.
- Use “Smart Search” as “Matching Criteria” for most searches.
  - Only use “Exact Match” as “Matching Criteria” if you can enter the exact “Ingredient Name,” “Ingredient Code,” etc.
  - “Exact Match” IS NOT case sensitive. “Exact Match” IS sensitive to changes to spelling, punctuation, spacing, etc.
- Enter parts of the ingredient name instead of attempting to enter the exact ingredient name if you do not remember the exact name. For example:
  - Exact name: PIZZA STRIPS PEPPERONI WHOLE GRAIN BULK 48CT CN
  - Parts of the name that you remember: Pepperoni pizza strips
  - What you should enter: Pepperoni pizza strips
- Try entering words such as “raw,” “fully cooked,” and “ready-to-eat” to narrow your ingredient search.
- Use the search filters at the top of each “Ingredient List” column to narrow your search. Type a word or number and select “Contains,” “DoesNotContain,” “EqualTo,” “NotEqualTo,” or “NoFilter.”

Tip: When you click on an ingredient hyperlink, the system clears search filters at the top of each “Ingredient List” column, and you must enter new search filters (at the top of each “Ingredient List” column) to continue the search.
CREATING A NEW INGREDIENT: GENERAL TAB

Follow steps 1-3 of pg. 4 to navigate to the ingredients subfolder.

1. Click on the “Add New Ingredient” link.
   Notice that the “Data Source” is set to “Local.” All ingredients created by districts are automatically stored in the “Local” database. Notice that the system only displays the “General” tab for the ingredient.

2. Enter the name of the ingredient in the “Ingredient Name” box. It is helpful to use the manufacturer’s name for the product or the ingredient name that displays on a product order or invoice.

3. Optional: Enter the short name (if applicable) of the ingredient in the “Ingredient Short Name” box. This is the name commonly used to describe the ingredient which will populate on the menu.

4. Select the correct “Ingredient Form” as “As Purchased” or “As Served.” “As Purchased” means that the ingredient can be served in the manner that it was purchased. “As Served” means that the ingredient must be “changed” before serving.

5. Optional: List the product ingredients in the “Sub Ingredients” box.

6. Select the “Display Weight in Recipe Steps” box if you want the weight of the ingredient to always display in the “Recipe Report” (can be printed for recipe production) when used in a recipe. For example, the recipe step may list, “5 cups tomatoes (2.22 lbs.)” rather than just “5 cups tomatoes.”

7. Optional: For ingredients served as individual menu items, enter any always-required instructions for the ingredient in the “Standard Recipe Directions” box.

8. Optional: Enter the name of the manufacturer in the “Manufacturer” box.


10. Optional: Enter any specific USDA or manufacturer’s code, or another similar code in the “Commodity/Recipe Code” box.
11. Optional: Select the “Texas Grown” box if the ingredient is produced locally in Texas.

12. Required: IF YOU SELECT THE “TEXAS GROWN” BOX, you must enter or select a “Producer” from the “Producer” drop down box.

13. Required: IF YOU SELECT THE “TEXAS GROWN” BOX, you must enter or select a “Distributor” from the “Distributor” drop down box.

14. Click on the “Save” button.
Clicking the “Save” button makes the “Ingredient Report” button, “Create Recipe” button, “Tags” section, “Serving Measures” section and all other tabs (“Nutrients,” Allergens,” “Buying Guide,” “Documents,” and “History”) appear. Notice that the system has assigned the ingredient a unique “Ingredient Code.”

Tip: For the purposes of creating ingredients, you can ignore the “Ingredient Report” button and the “Create Recipe” button until later in the process.

15. Enter any “Tags” that help you identify a specific ingredient or categories of ingredients and click on the plus icon box to save the “Tags.”
16. Enter the “Serving Size” of the ingredient by entering the number and selecting a serving unit from the drop down box. Make sure that the serving size correlates with the weight. Notice that you can click on the “Add new unit...” link to add a unit when a serving unit does not already exist in the system.

Tip: Type in the name of the serving measure to select a serving measure without having to scroll throughout the entire list.

17. Enter the “Weight” of the ingredient serving size by entering the number and selecting a weight unit from the drop down box.

18. Click on the “Add” button.

Notice that the entered “Serving Size” and “Weight” populates in the table and that the system automatically calculates the “Serving Size” and “Weight” for one or multiple units of the “Serving Size.”

19. Optional: “Edit” or “Delete” the entered ingredient by clicking on the pencil icon (to edit) or trash can icon (to delete.)
CREATING A NEW INGREDIENT: NUTRIENTS TAB

1. Click on the “Nutrients” tab of the ingredient.

2. Enter the “Serving Size” listed on the Nutrition Facts label of the ingredient by entering the number and selecting a serving unit from the drop down box.

3. Enter the nutrient value (“Calories” through “Ash”) for each nutrient listed on the Nutrition Facts label of the ingredient or select the “Is Missing” box if the information is not available.

Tip: You do not need to enter nutrient information for nutrients that are not on the Nutrition Facts label (or other nutrient information) for the ingredient. Make sure to select the “Is Missing” box if the information is not available. Many labels will not contain information for “Moisture” or “Ash” content.
Tip: Some Nutrition Facts labels list Iron, Calcium, Vitamin A, and Vitamin C as percentages instead of mg or IU. Use the text boxes on the left to enter the numbers as mg or IU. Use the text boxes on the right to enter the numbers as percentages. When you enter the number as a percentage, the system will automatically calculate the correct mg or IU.

4. Click on the “Save” button.
CREATING A NEW INGREDIENT: ALLERGENS TAB

1. Click on the “Allergens” tab of the ingredient.

2. Select the box next to each allergen if the product “Contains,” “May contain,” or is “Processed in a facility that also processes” that allergen.

Tip: Some labels may not designate allergen information specifically, and you may need to determine allergen information based on the ingredients in the product. Check the front of label packaging, ingredient list, and/or contact the manufacturer for more allergen information.

3. Select the correct “Allergen Indicator” (“Contains, “May contain” or is “Processed in a facility that also processes”) for the allergen.

4. Select the “None Indicated” box for ingredients that do not meet any “Allergen Indicator” for the listed “Standard Allergens.”

5. Click on the “Save” button.

Tip: Visit the “Custom Allergens” subfolder of the “Configuration” folder (in the “Menu Planning” tab) to add custom allergens to the list of “Allergen Indicator(s).”
CREATING A NEW INGREDIENT: BUYING GUIDE (STOCK ITEMS) TAB

FAQS

Why must I turn ingredients into stock items?

Turning ingredients into stock items allows you to generate compliant food production records that contain information about the quantity of ingredients prepared (for example, No. 10 cans, lbs, etc.). With stock items, you can also generate recipe and meal costing reports that help you track meal costs.

Tip: In order to generate accurate recipe and meal costing reports, enter price information for every ingredient used in the meals. Purchase information may be added at a later date, if desired.

1. Click on the “Buying Guide” tab of the ingredient.

2. Click on the “Create Stock Item” button.

Notice that the system generates a new window (pictured on next page).
**Note:** All of the fields that are not addressed on this page may be left unchanged or blank by users and do not impact anything significant in MENU Module.

The items marked with an asterisk (*) **MUST** be completed by the user for the system to move forward and save the stock item information. However, unless specifically addressed on this page, what the user enters for these fields does not significantly impact MENU Module.

Information entered here, impacts the food production record. Users **MUST** enter information correctly.

If users select “USDA Commodity,” from the dropdown, the system replaces the “Net off Invoice” field with a field called “Commodity Value.” In this case, enter the “Commodity Value” for “USDA foods.”

The name entered for the “Broken Unit Description” **MUST** match the unit selected for the “Broken Unit Size.”

Users **MUST** enter a “Fair Market Value/Standard Price” for every ingredient in order to generate meal cost reports. Users who do not wish to generate cost reports may enter “0.”

Click here to save the stock item information.
3. Type or select the stock item information listed in the "Item Info" tab for the ingredient. Use the following as a guide.

Tip: The system requires users to complete fields (marked by an *) in order to move forward and “Save” a stock item. In addition, users must fill out some fields that are not marked by an * in the system to generate compliant food production records and accurate recipe costing and meal costing reports.

“Is Active” box (Non-editable): The system automatically checks the “Is Active” box to designate active stock items.

Data (Non-editable): Stock items created by districts will always save to the “Local” “Data Source.” Districts cannot edit the “Data Source.”

District Item # (Non-editable): The “District Item #” refers to the stock item number the system generates after users save a stock item. Users cannot edit this field.

GTIN Code (Optional): Enter the Global Trade Item Number (GTIN), an identifier used within bar codes.

Item Name/Description (Required): Users must enter a name for the stock item (can be the same as ingredient name).

Tip: Use an “Item Name/Description” that will help you distinguish the item from other stock items.

Item Valuation Group (Required): Select the “Item Valuation Group,” from the drop down box. Select “Non-commodity Food,” “Commodity Food,” or “Non-Food.”

Item Type (Required): Select the “Item Type” (“Non-commodity Food,” “Commodity Food,” or “Non-Food.”)

Item Category (Required): Select the “Item Category” that best fits the stock item. Users do not need to change the selection unless they plan to search for stock items by “Item Category.”

Brand Name (Optional): Type the “Brand Name” of the item.
Manufacturer Name (Optional): Type the “Manufacturer Name” of the stock item.

MFG/Product Code (Optional): Type the MFG or Product Code for the stock item.

Purchase/Whole Unit (Required):
Select the unit, from the drop down box, that best describes the largest unit purchased for the item.

Broken Units per Whole Unit (Required): Type the number of “Broken Units” in the whole unit for the item.

Broken Unit Description (Required): Type the name that best describes the broken unit of the item. This field should match the unit for the “Broken Unit Size.”

Broken Unit Size (Required): Enter the broken unit size by typing a number and selecting a unit from the drop down box.

Broken Unit Weight (Required): Enter the broken unit weight by typing the number and selecting the unit from the drop down box.

Tip: The “Broken Unit Weight” should match the “Broken Unit Size.”

Whole Units per Pallet (Optional): It is not necessary to enter anything in this field.

Storage Category (Optional): Select the “Storage Category” for the item from the drop down box. Select “Cooler,” “Dry,” or “Freezer.” Users do not need to change the selection unless they plan to search for stock items by “Item Category.”

Is Orderable in Broken Units (Optional): It is not necessary to enter anything in this field.

Fair Market Value/Standard Price (Required): Enter the net price of the item listed on the item invoice.

Commodity Value (Required): Enter the “USDA Foods Value” if you selected “USDA Commodity” as the “Item Type.”

Net off Invoice (Optional): It is not necessary to enter anything in this field.

Bid Category (Optional): It is not necessary to enter anything in this field.

Bid Specification (Optional): It is not necessary to enter anything in this field.
Acceptable Brands: It is not necessary to enter anything in this field.

Allow Alternate Pack Sizes: It is not necessary to enter anything in this field.

4. Click on the “Add Item” box.
   Notice that the system takes you back to the “Buying Guide” tab and populates some of the spaces in the “Buying Guide” tab with the information entered into the stock “Item Info” tab.

5. (REQUIRED) Select a “Prep Method” from the drop-down box. Select “As Purchased” for items served in the purchased form (without any preparation), “Cooked” for items that require cooking (or preparation), or “Drained” for items that require draining.
   *Districts must select a “Prep Method” so that the stock item will link to the ingredient. If districts do not select a “Prep Method,” the stock item link will seem to “disappear.”*

6. Click on the “Display Item Weight In Production” box to select the box. The system requires this action for the item weight to display on the food production record.

7. Click on the “Save” button.
   Notice that this action generates the “Cost Per Serving Measure” section to appear. This section breaks down the cost per serving of the stock item.
### ADDITIONAL STOCK ITEM INFORMATION

#### Whole vs. Broken Unit Size and Weight

Whole vs. broken unit size and weight information entered for the stock item significantly impact the food production record, recipes, and more. Users MUST enter this critical stock item information correctly.

![Whole vs. Broken Unit Size and Weight Form](image)

**Purchase/Whole Unit**: Enter the largest unit that the user purchases this ingredient.

- For example, a case, package, bag, etc.

Use the following list, from the system to select a “Purchase/Whole Unit” for the stock item:

<table>
<thead>
<tr>
<th>Bag</th>
<th>Dozen</th>
<th>Ounce</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bale</td>
<td>Each</td>
<td>Package</td>
</tr>
<tr>
<td>Bar</td>
<td>Flat</td>
<td>Pail</td>
</tr>
<tr>
<td>Basket</td>
<td>Fluid ounce</td>
<td>Pair</td>
</tr>
<tr>
<td>Block</td>
<td>Gallon</td>
<td>Pan</td>
</tr>
<tr>
<td>Bottle</td>
<td>Gram</td>
<td>Pint</td>
</tr>
<tr>
<td>Box</td>
<td>Half Pint</td>
<td>Pound</td>
</tr>
<tr>
<td>Bucket</td>
<td>Head</td>
<td>Quart</td>
</tr>
<tr>
<td>Bunch</td>
<td>Jar</td>
<td>Rack</td>
</tr>
<tr>
<td>Bund</td>
<td>Kilogram</td>
<td>Roll</td>
</tr>
<tr>
<td>Bundle</td>
<td>Lift</td>
<td>Sleeve</td>
</tr>
<tr>
<td>Can</td>
<td>Liter</td>
<td>Slice</td>
</tr>
<tr>
<td>Carton</td>
<td>Loaf</td>
<td>Stick</td>
</tr>
<tr>
<td>Case</td>
<td>Lug</td>
<td>Tray</td>
</tr>
<tr>
<td>Container</td>
<td>No. 10 can</td>
<td>Tub</td>
</tr>
<tr>
<td>Cup</td>
<td>No. 2 ½ can</td>
<td>Tube</td>
</tr>
<tr>
<td>Cylinder</td>
<td>No. 3 cylinder</td>
<td></td>
</tr>
</tbody>
</table>
**Broken Unit Description:** Enter the smaller units that make up the whole unit.

- For example, does the case contain individual patties, pizzas, or burritos? If so, the user may enter **“Each”** as the broken unit.
- Does the package of crackers contain smaller bags of crackers? If so the user may enter **“Bag”** as the “Broken Unit Description.”

Users should make every effort to enter a different unit for the “Broken Unit Description” than the “Purchase/Whole Unit.”

- For example, even though a bulk “Jar” (Purchase/Whole Unit) of mayonnaise does not contain distinct broken units, such as, “Each” or “Package(s),” the bulk “Jar” of mayonnaise can be broken down into ounces. In this example, the “Purchase/Whole Unit” for the mayonnaise is “Jar” and the “Broken Unit Description” is “Ounce.”

**Note:** Users may use the “Purchase/Whole” unit list from the previous page to select a “Broken Unit Description.”

**Broken Units per Whole Unit:** Enter the number of broken units in each whole unit.

- For example, “128” “Ounce” per “Jar.” In this example, the “Broken Units per Whole Unit” is “128.”
- For example, “6” “no. 10 can” per “Case.” In this example, the “Broken Units per Whole Unit” is “6.”

**Broken Unit Size:** Enter the size of one broken unit. The broken unit selected from the drop down box MUST match the “Broken Unit Description” entered for the stock item.

- For example, while a “Case” may contain “108” “Each” (of apples), the broken unit size is “1” “Each” (or one apple).
- For example, while a “Package” of broccoli may contain “6” “Bags” (of broccoli), the broken unit size is “1” “Bag.”

**Broken Unit Weight:** Enter the weight of one broken unit in grams, ounces, or pounds.

- For example, “1” “Bag” of broccoli (from the “Package”) equals “2” “Pound” as the “Broken Unit Weight.” In one package of broccoli, there are six 2-pound bags.
- For example, “1” “Each” of apples (from the “Case”) equals “0.25” “Pound” as the “Broken Unit Weight.” One case of apples, contains 108 quarter-pound apples (entered as “Each”).
- For example, “128” “Ounce” of mayonnaise (from the “Jar”) equals, “128” “Ounce” as the “Broken Unit Weight.” One jar of mayonnaise contains 128 ounces that each weigh 1 ounce.
**ADDITIONAL STOCK ITEM INFORMATION**

**Stock Items from the “TDA Shared Database”**

The “TDA Shared” database contains ingredients that have been turned into stock items and already contain whole unit and broken unit size and weight information. For these items, the price equals “0.” If the stock item information matches the information of the user’s ingredient, users may use the stock item, as is, from the “TDA Shared” database and enter a “Local” price for the stock item.

Users may use the ingredient/stock item from the “TDA Shared” database “as is” and enter “Local” price information to generate meal costing reports.
Price Adjustment

Rather than visiting each individual stock item to update price information, users may visit the “Price Adjustment” subfolder in the “Ingredients” folder to adjust price for all stock items from a single location within the system.

Enter price information here.
CREATING A NEW INGREDIENT: DOCUMENTS TAB

FAQS

What is the purpose for the “Documents” tab in each ingredient?

MENU Module allows you to save documents and images that correlate with your ingredient, such as Child Nutrition (CN) Labels, Nutrition Facts Labels, Product Manufacturer statements and invoices.

Access your ingredient documentation easily from any computer for daily use or for an Administrative Review (AR).

1. Click on the “Documents” tab of the ingredient.

2. Click on the “Upload File” button.

   Notice that a window appears that allows you to select files to upload (pictured on next page).
3. Click on the “Select” button. Notice that a file explorer window, associated with files on your computer appears (pictured in step 4).

4. Select the file that you want to upload and click on the “Open” button.
5. Click on the “Upload” button.  
Notice that an image of the file appears (if it is an image file) in the space on the left (pictured in step 7 and on pg. 24).

6. Type a “Description” that will help you identify the uploaded document in the “Description” field.

7. Click on the “OK” button.  
Notice that a description of the uploaded document appears in the “Documents” section.

If the uploaded file is a type of image file, the image appears here.
Example:

8. Optional: Click on the printer icon to print the document (not shown).
   Some browsers may not allow the printer icon to show.

9. Optional: Click on the trash can icon to delete the document.
CREATING A NEW INGREDIENT: HISTORY TAB

1. Click on the “History” tab of the ingredient. Notice that all changes made to this ingredient are documented here. Each listed change includes a time stamp and the name of the user associated with the change.

2. Click on “Show Details” from an item on the list to view the specific changes.

3. Optional: Select a specific type of change made to the ingredient from the “Filter On” drop down box to view the “History” results for that change only.
**USING NON-LOCAL DATABASE INGREDIENTS**

**FAQ**

Why should I use non-local databases ingredients?

Use ingredients from MENU Module’s non-local databases (“TDA Shared,” “Child Nutrition Database,” and “Cybersoft.”) to save time.

In general, you can only change the “Buying Guide” and “Documents” tab of non-local database ingredients. This allows you to create stock items and store documentation for the ingredient.

Tip: Using an ingredient, saved in the non-local database, allows you to receive ingredient updates anytime the database administrators make updates to the ingredient.

When using non-local database ingredients, the following applies:

- “General” tab: Cannot be altered.
- “Nutrients” tab: Cannot be altered.
- “Allergens” tab: Cannot be altered.
- “Buying Guide” tab: Use the “Buying Guide” tab to create a ingredient/stock item link.

The stock item information saves to the “Local” database but remains linked to the ingredient in the non-local database so that you may always view the stock item information when viewing the ingredient.

Create a stock item for a non-local database ingredient the same way you would create a stock item for an ingredient you manually enter into the system. See page 16-24.
Note: Most “TDA Shared” database ingredients already contain stock item information. For “TDA Shared” ingredients, users may enter a “Local” price, click on the “Save Item Standard Prices” button and use the ingredient “as is” in recipes and for meal costing reports.

“Documents” tab: Use the “Documents” tab to save ingredient documentation. The ingredient remains in the non-local database but the documentation saves to the “Local” database.

Save documents in the “Documents’ tab the same way you would for an ingredient you manually enter into the system. See page 25-28.

“History” tab: The system captures any changes associated with the ingredient in the “History” tab of that ingredient.

Note: If you update the “Buying Guide” tab or “Document” tab for an ingredient stored in a non-local database, you will see the “Local” stock item and “Local” document information each time you access the ingredient.
COPYING INGREDIENTS

FAQ

Why should I copy ingredients from non-local databases?

If you want to save time, consider using ingredients from non-local databases. Find an ingredient that fits your needs, copy the ingredient to the “Local” database, and make changes to the ingredient as needed.

Changes may include updating allergens, serving sizes, nutritional information, or stock item whole and broken unit information.

The system allows you to change any ingredient tab (“General,” “Nutrients,” “Allergens,” “Buying Guide,” “Documents,” and “History”) for copied ingredients.

Follow steps 1-3 of pg. 4 to navigate to the ingredients subfolder. Apply search terms as described on page 4.

1. Select the hyperlink next to the ingredient that you want to copy.
   Notice that the system takes you to the “General” tab of that ingredient.

2. Select the “Copy…” button.
   Notice that the system generates a pop-up window. Notice that ingredient copies always save to the “Local” “Data Source” (pictured on the next page).
3. Delete (unless you want to keep) the words “Copy of” from the “Name for the copy.”
   You may use the original ingredient name or elect to give the ingredient a new name.

4. Type a “Short Name for the copy” in the “Short name for the copy” field or edit the current “Short Name for the copy.”

5. Click on the “Copy” button to save the copy and redirect you to the “General” tab of the new ingredient copy.

6. Proceed to edit the ingredient as needed, and as you would for a manually entered ingredient (described on page 9-25.)
   Tip: Ingredient “Tags” do not transfer for copied ingredients. You must manually enter new, desired “Tags” for copied ingredients.
GENERATING INGREDIENT REPORTS

To generate a report for one ingredient:

Follow steps 1-3 of pg. 4 to navigate to the ingredients subfolder. Apply your search terms as described on page 4.

1. Select the hyperlink next to the ingredient for which you want to generate an “Ingredient Report.”
   Notice that the system takes you to the “General” tab for that ingredient.

2. Click on the “Ingredient Report” button.
   Notice that the report includes a date the report was accessed and name of user accessing the report, the name and code of the ingredient, any listed “Sub Ingredients,” the serving size and “Weight In Grams” of the serving size, and nutrient values per serving and per 100 grams of the ingredient.

To generate a report for multiple ingredients:

1. Click on the “Menu Planning” tab.
2. Click on the “Reports” folder.
3. Click on the “Ingredient List” subfolder.
4. Optional: Select a “Tag(s)” from the drop down box.

5. Optional: Select a “Form” (“All” [includes “As Purchased” and “As Served”], “As Purchased,” or “As Served.”)

6. Optional: Select a “Data Source” to filter your search results.

7. Click on the “Generate Report” button.
   Notice that the system generates one page for each ingredient. The report includes a date the report was accessed and name of user accessing the report, the name and code of the ingredient, any listed “Sub Ingredients,” the serving size and “Weight In Grams” of the serving size, and nutrient values per serving and per 100 grams of the ingredient for each ingredient included in the report.

Tip: Print or export the report to one of seven formats: XML, CVS, PDF, MHTL, TIFF, Excel or Word.
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Office of the Assistant Secretary for Civil Rights
1400 Independence Avenue, SW
Washington, D.C. 20250-9410;

(2) fax: (202) 690-7442; or

(3) email: program.intake@usda.gov.