



MENU ITEMS
MENU SOFTWARE

MENU ENHANCEMENT NUTRITION MODULE

USER'S GUIDE



TEXAS DEPARTMENT OF AGRICULTURE
COMMISSIONER SID MILLER

OTHER RESOURCES

In addition to the *User's Guide: Menu Items*, you may use the following resources to learn more about "Menu Items" in MENU Module.



PRIMERO EDGE'S MENU PLANNING USER MANUAL

- Page 40-41
- Page 48-50



PRIMERO EDGE VIDEO TRAINING LIBRARY

- 1- Create a Menu Item

CREATING MENU ITEMS: BASIC INFORMATION



1. Click on the “Menu Planning” tab.



2. Click on the “Ingredients” folder.



3. Click on the “Recipes” subfolder.



4. Narrow recipe search using the “Recipe Search Criteria.”



5. Click on the recipe link for the recipe associated with the menu item you want to create.



Note: Remember that each menu item in MENU Module will correspond to a single recipe within the system.



6. For non- “Local” database recipes (that have not been turned into menu items) create a copy of the recipe in the “Local” database by clicking on the “Copy” button of the “General” tab.

Creating a local copy of a recipe activates the “Menu Item” tab and allows users to store menu item information for non- “Local” database recipes that have not been turned into menu items.

The screenshot shows the MENU Module interface. The 'Menu Planning' tab is selected, and the 'Ingredients' folder is expanded in the left sidebar. The 'Recipes' subfolder is selected, and the 'Recipe Search Criteria' section is visible. The search results show a list of recipes, including 'LR1030 Lentils of the Southwest Texas Grown' and 'LR1000 Southwest Burrito, 2G, 2M, 1/2V'. The 'Discontinue' button is visible for each recipe.

Recipe Code	Name	Serving Size	Type	Number of Servings	Source	
LR1030	Lentils of the Southwest Texas Grown	1/4 Cup	Dual Entry	50	Local	Discontinue
LR1000	Southwest Burrito, 2G, 2M, 1/2V	1 burrito	Dual Entry	100	Local	Discontinue



7. Click on the “Menu Item” tab for the recipe that you want to make into a menu item.



8. Enter the “Menu Item” name.

Notice that the system automatically assigns the “Recipe Name” as the “Menu Item” name. Change the “Menu Item” name, if desired.



9. Enter the “Full Name” for the menu item.

Notice that the system automatically assigns the “Recipe Name” as the “Full Name.” Change the name to a different “Full Name,” if desired.



10. Enter the “Marketing” Name.”

The “Marketing Name” will display on the “Menu Calendar Report” (a menu for students and parents) and on the School Café app.



Tip: Give the menu item a “Marketing Name” that will sound appealing to students and parents.



11. Optional: Enter a “Marketing Description” for your “Menu Item.”

The “Marketing Description” provides a space to write an enticing, up to 5,000-character description of the menu item. The “Marketing Description” displays on the School Cafe App when users publish menus.

Notice that users cannot edit the “Texas Grown” field. The system auto-populates the “Texas Grown” field based on whether the ingredients entered for the recipe are “Texas Grown.”



12. Select a “Menu Item Category” from the list.

Remember that you can add or edit “Menu Item Categor(ies)” in the “Configuration” folder of the “Menu Planning” tab under “Menu Item Categories” if the pre-programmed “Menu Item Categories” do not meet your needs. Avoid duplicating “Menu Item Categories” within the system when possible.



13. Optional: Check the “Preparation Site Item” box if this item is prepared at a different site.



14. Check the “Show in Summary” box for the item to display on the “Menu Calendar Report” (the menu calendar for students and parents.)

For example, some users may want to exclude milk or condiments from the “Menu Calendar Report” for students and parents.



15. Select a “Leftover Category” (“Unspecified,” “Carryover,” “Return to Stock,” or “Waste.”)

- Carryover: Staff should serve the remaining items for a certain number of days.
- Return to Stock: Staff should return leftover items to stock (for example, individual serving milk cartons).
- Waste: Staff should discard the leftover items.
- Unspecified: All options remain available for the menu item on the food production record.



16. For “Carryover” items, select “Maximum Carryover Days.”

This action limits staff that complete food production records from serving the leftover item for more days than the specified number.



17. Optional: Click on the “Upload Picture” button and follow the prompts to upload a menu item photograph.

Uploaded photographs appear in the School Café App and serve to market your menu items to student and parents. Users should choose a good quality photograph that portrays the food item accurately. Users may find tips on taking quality menu item photographs, in the “Food Photography Basics” curriculum found on the MENU Module page of Squaremeals.org.



Tip: Using poor quality menu item photographs can hurt marketing efforts and discourage students from eating school food. Using high quality photos can entice students and encourage meal participation. Smart phone cameras can usually produce quality photographs, and districts do not need to invest in expensive, professional cameras to take good photographs



18. Click on the “Save” button to create the menu item.

Recipe Auto Save when switching tabs No prompts

Name: Southwest Burrito, 2M, 2G, 1/2 V Recipe Report

General Ingredients Nutrients **Menu Item** Allergens Scale Documents (0) History

Menu Item: Southwest Burrito, 2M, 2G, 1/2 V Upload Picture Save

Full Name: Southwest Burrito, 2M, 2G, 1/2 V

Marketing Name:

Marketing Description:

Texas Grown: No

Menu Item Category: --Select--

Preparation Site Item:

Show In Summary:

Leftover Category: Unspecified

Maximum Carryover Days: 7

Recipe Auto Save when switching tabs No prompts

Name: Southwest Burrito, 2M, 2G, 1/2 V Recipe Report

General Ingredients Nutrients **Menu Item** Allergens Scale Documents (0) History

Menu Item: Southwest Burrito, 2M, 2G, 1/2 V Click to enlarge Save

Full Name: Southwest Burrito, 2M, 2G, 1/2 V

Marketing Name: Southwest Burrito Ole

Marketing Description: Tangy barbeque pork, savory beans and spiced rice... this drool worthy burrito all comes together in a warm tortilla to give you a reason to eat on campus and make you say "yum!"

Texas Grown: No


Menu Item Category: Entrée/Combo-TDA

Preparation Site Item:

Show In Summary:

Leftover Category: Carryover

Maximum Carryover Days: 1

 Upload Picture

Uploaded File: Southwest_burrito.jpg

Delete Picture

CREATING MENU ITEMS: SERVING SIZES

Notice that when you click on the "Save" button, the system generates a section in the "Menu Item" tab called "Available Menu Item Serving Sizes," "Contributions," "Default Serving Size Exceptions," and "Smart Snacks."



1. Scroll down to view the "Available Menu Item Serving Sizes" section. Notice that the system automatically generates the serving size listed in the recipe (in the "General" tab) as the default "Menu Item" serving size.



Tip: Always make sure to use the same serving size unit (for example, fluid ounces, each, cups, etc.) for the recipe ("General" tab) and menu item ("Menu Item" tab). Different serving size units in the "General" and "Menu Item" tab will cause errors in the system.



2. Optional: Click on the "Add New Serving Size" plus sign box to add a new menu item serving size. This selection allows users to offer the same menu item in different serving sizes.

Example: For example, a district may want to use the same spaghetti recipe for K-5 students and 9-12 students but offer K-5 students $\frac{1}{2}$ cup of pasta and 9-12 students 1 cup of pasta.

Available Menu Item Serving Sizes					
+ Add New Serving Size					
Serving Size	Portioning Tool	Is Default	Meal Contribution	Edit / Select Food Contributions	Delete
1.000 burrito		✓			



3. Enter the number and select the unit from the drop down box for the additional serving size.



4. Optional: Enter a "Portioning Tool" staff should use to portion the serving (for example, a #4 scoop, #8 scoop, etc.).



5. Click on the "Is Default" box to make the new serving size the default serving size for the menu item.



6. Click on the "Insert" link to save the new serving size.

Available Menu Item Serving Sizes					
+ Add New Serving Size					
Serving Size	Portioning Tool	Is Default	Meal Contribution	Edit / Select Food Contributions	Delete
Serving Size: 1/2 burrito	Portioning Tool: <input type="text"/>	Is Default: <input type="checkbox"/>			

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

Notice that the system adds the new serving to the “Available Menu Item Serving Sizes” table. To edit or to delete the menu item select the pencil icon and trash can icon, respectively, and follow the prompts.

Available Menu Item Serving Sizes					
+ Add New Serving Size					
Serving Size	Portioning Tool	Is Default	Meal Contribution	Edit / Select Food Contributions	Delete
0.500 burrito					
1.000 burrito		✓			



7. Optional: Scroll down to view the “Default Serving Size Exceptions” section. Click on the “Add New Serving Size Exception For Serving Group” if you want to assign a different default menu item serving size for a specific serving group.

Default Serving Size Exceptions				
+ Add New Serving Size Exception For Serving Group				
Meal Pattern	Serving Group	Serving Size	Edit	Delete
No records to display.				

- a. Select a meal pattern from the first drop down box labeled “Serving Group.”
- b. Select a “Serving Group” from the second drop down box.
- c. Select a “Serving Size” from the drop down box.
- d. Click on the “Insert” link to save the new default serving size for the serving group.

Now, anytime a user adds the menu item to a menu, for the selected serving group, the system will automatically use the serving size exception.

Default Serving Size Exceptions				
+ Add New Serving Size Exception For Serving Group				
Meal Pattern	Serving Group	Serving Size	Edit	Delete
Serving Group:	[USDA]Meal Pattern SY 2017-2022	Adult		
Serving Size:	2 burrito			
Insert Cancel				
No records to display.				

Default Serving Size Exceptions				
+ Add New Serving Size Exception For Serving Group				
Meal Pattern	Serving Group	Serving Size	Edit	Delete
[USDA]Meal Pattern SY 2017-2022	Adult	2 burrito		

CREATING MENU ITEMS: FOOD COMPONENT CONTRIBUTIONS



1. From the “Default Serving Size Exception,” section scroll up to the “Contributions” section.

Notice that the word “Contributions” is followed by a hyphen and a serving size. Because different serving sizes do not contribute the same meal contribution, users must enter the meal contribution for each menu item serving size.

Notice that the system highlights the selected serving size in the “Available Menu Item Serving Sizes” section.

The following steps allow users to assign the “Food Component” contribution for the serving sizes (listed to the right of the word “Contributions”).



2. For fluid milk menu items, select one milk option from the “Milk Type” drop down box.



3. For fruit and or vegetable juice or a grain-based dessert menu items, select the applicable check boxes: “Fruit Juice,” “Vegetable Juice,” or “Grain Based Dessert.”



4. Scroll down to the “Food Component” section and select a menu item “Contribution” amount for the “Food Component(s)” that the menu item contributes to.

Notice that, for “Grains,” users must select “Whole Grain-Rich” or “Non Whole Grains-Rich.”

Notice that, for “Vegetables,” users must select the “Vegetables” subgroup, “Dark Green,” “Red/Orange,” “Beans/Peas (Legumes),” “Starchy,” or “Other.”

Notice that the system records the “Fruits,” “Fluid Milk,” and “Vegetables” “Food Component(s)” in increments of $\frac{1}{8}$ cups.

Notice that the system records “Meat/Meat Alternates” and “Grains” “Food Component(s)” in increments of $\frac{1}{4}$ oz. eq..



5. Click on the “Save” button to save the “Food Component” contribution for the serving size.

Enter contribution information for the selected serving size.

Contributions - 1.000 burrito Selected serving size.

Meal Pattern ?

Milk Type:

Fruit Juice Vegetable Juice Grain Based Dessert

Food Component	Contribution
Fruits (cups)	<input type="text" value=""/> Fruit
Fluid Milk (cups)	<input type="text" value=""/> MILK-F
Meat/Meat Alternates (oz eq.)	<input type="text" value="2"/> Meat/MA
- Grains (oz eq.) -	
Whole Grain-Rich	<input type="text" value="2"/> WGR
Non Whole Grains-Rich	<input type="text" value=""/> Non-WGR
- Vegetables (cups) -	
Dark Green	<input type="text" value=""/> Veg-DG
Red/Orange	<input type="text" value=""/> Veg-RO
Beans/Peas (Legumes)	<input type="text" value=""/> Veg-BP
Starchy	<input type="text" value=""/> Veg-S
Other	<input type="text" value=""/> Veg-O

Highlighted serving size (in blue).

Available Menu Item Serving Sizes

Serving Size	Portioning Tool	Is Default	Meal Contribution	Edit / Select Food Contributions	Delete
1.000 burrito		✔			
2.000 burrito					

To add “Food Component” contribution for other serving sizes:



6. Click on another serving size in the “Available Menu Item Serving Sizes” section to highlight the serving size.

Notice that the highlighted serving size now displays after the word “Contributions” followed by a hyphen and the selected serving size.



7. Follow the steps previously listed in steps 2-5 to assign the “Food Component” contribution for other serving size(s).

Available Menu Item Serving Sizes

Serving Size	Portioning Tool	Is Default	Meal Contribution	Edit / Select Food Contributions	Delete
0.500 burrito					
1.000 burrito					

Annotations: Red arrows point to the 0.500 burrito row with the text "Click on this serving size to highlight it." and to the 1.000 burrito row with the text "This serving size is currently highlighted."

Contributions - 0.500 burrito

Meal Pattern ?

Milk Type: -- SELECT --

Fruit Juice Vegetable Juice Grain Based Dessert

Annotation: A red arrow points to the title "Contributions - 0.500 burrito" with the text "This confirms that you can now enter the serving size information for the highlighted serving size."



8. After saving all “Food Component” information for the menu item serving sizes, scroll up to view the “Available Menu Item Serving Sizes” table.

Notice that the “Meal Contribution” column now contains the “Meal Contribution” information for each serving size.

Available Menu Item Serving Sizes

Serving Size	Portioning Tool	Is Default	Meal Contribution	Edit / Select Food Contributions	Delete
0.500 burrito			1 WGR, 1 Meat/MA		
1.000 burrito			2 WGR, 2 Meat/MA		

Annotations: Red arrows point to the "Meal Contribution" cells for both rows.



Note: This manual does not address the “Smart Snacks” section of the “Menu Item” tab. Use “Amigo” to help you enter “Smart Snacks” information and designate menu items as “Smart Snacks” items.

SEARCHING FOR MENU ITEMS



1. Click on the “Menu Planning” tab.



2. Click on the “Ingredients” folder.



3. Click on the “Menu Items” subfolder.



4. Enter or select search criteria for “Menu Items.”



Note: See the “Quick Guide: Menu Item Search Criteria,” on the next page.



5. Click on the “Apply” button.



6. Select the “Menu Item” or “Recipe Code” hyperlink for the menu item that you want to use or edit.

The screenshot shows the 'Menu Items' search interface. The 'Menu Planning' tab is selected. In the left sidebar, the 'Ingredients' folder is expanded, and the 'Menu Items' subfolder is selected. The search area contains fields for 'Menu Item', 'Category' (set to 'ALL'), and 'Ingredient Code'. There are checkboxes for 'Smart Search' and 'Show Only Texas Grown'. Below these are fields for 'Recipe Code' and 'Tags', with an 'Apply' button. The 'Menu Item List' table below shows several items, with the 'Southwest Burrito, 2G, 2M, 1/2V' item highlighted. Red arrows point to the 'Menu Planning' tab, the 'Ingredients' folder, the 'Menu Items' subfolder, the search fields, the 'Apply' button, and the 'Southwest Burrito' item in the list.

Category	Menu Item	Recipe Code	Ingredient Code	Serving Size	Meal Contribution	Allergens	Data Source	
Entrée/Combo-TDA	Southwest Burrito, 2G, 2M, 1/2V	LR1000		1 burrito			Local	Discontinue
Meat/MA-TDA	Baked Fish Scandia	LR1006		1 portion	2 Meat/MA	Contains Fish.	Local	Discontinue
Meat/MA-TDA	Low Fat Sausage Link	LR1009		1 link	1/2 Meat/MA		Local	Discontinue
Fruit-TDA	Apple Juice	LR1010		1 Each	1/2 Fruit 1/2 Fruit-J		Local	Discontinue

QUICK GUIDE: MENU ITEM SEARCH CRITERIA

Menu Item: Enter the name of the menu item. Users may enter part or the entire menu item name.

Category: Select a menu item “Category” to filter the search by menu item categories.

Ingredient Code: Enter the “Ingredient Code” to find a menu item associated with an ingredient with a specific code.

Recipe Code: Enter the “Recipe Code” to find a menu item associated with a recipe with a specific code.

Smart Search: Select “Smart Search” to find menu items that contain any part of the letter, sequence, or word(s).

Include Discontinued Menu Items: Select the “Include Discontinued Menu Items” box to include discontinued menu items in the search if necessary.

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

Apply: Select “Apply” to search for a menu item based on the information entered and/or selected within the menu item search criteria.

Reset: Select “Reset” to clear all selections and information entered into the search criteria fields.

Column Header	Data Type	Description
Category	View only	Sortable; Lists the menu item category.
Menu Item	Clickable link	Sortable; Click to display Menu Item tab of the recipe that menu item is associated with.
Recipe Code	Clickable link	Sortable; Click to display General tab of the recipe that menu item is associated with.
Ingredient Code	View only	Sortable; Lists the ingredient code for single-ingredient recipes.
Serving Size	View only	Lists default serving size for the menu item.
Meal Contributions	View only	Lists all food components for the menu item.
Allergens	View only	Sortable; Lists all allergens associated with the menu item.
Data Source	View only	Sortable; Lists the data location (database) of the menu item.

Menu Item List								
Category	Menu Item	Recipe Code	Ingredient Code	Serving Size	Meal Contribution	Allergens	Data Source	
						<input type="text"/>	<input type="text"/>	
Fruit-TDA	Mandarin Fruit Cup	TR1000		1/2 Cup	1 Fruit		Local	Discontinue
Vegetable-TDA	Carrots, baby frozen	TR1003		1 Cup	1/2 Veg-RO 1/2 Vegetable-J		Local	Discontinue
Grain-TDA	Chocolate Chip Cookies	TR1007		2 cookie (2" dia)	1/4 WGR 1/4 Grain-D	Contains Egg, Gluten, Milk, Soy, Wheat.	Local	Discontinue
Vegetable-TDA	Corn on the Cob	TR1010		1 Each	1/4 Veg-S 1/4 Vegetable-J		Local	Discontinue
Grain-TDA	Garlic Bread	TR1012		2 Each	1/4 WGR		Local	Discontinue



TEXAS DEPARTMENT OF AGRICULTURE COMMISSIONER SID MILLER

In accordance with Federal civil rights law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, the USDA, its Agencies, offices, and employees, and institutions participating in or administering USDA programs are prohibited from discriminating based on race, color, national origin, sex, disability, age, or reprisal or retaliation for prior civil rights activity in any program or activity conducted or funded by USDA.

Persons with disabilities who require alternative means of communication for program information (e.g. Braille, large print, audiotape, American Sign Language, etc.), should contact the Agency (State or local) where they applied for benefits. Individuals who are deaf, hard of hearing or have speech disabilities may contact USDA through the Federal Relay Service at (800) 877-8339. Additionally, program information may be made available in languages other than English.

To file a program complaint of discrimination, complete the **USDA Program Discrimination Complaint Form**, (AD-3027) found online at: http://www.ascr.usda.gov/complaint_filing_cust.html, and at any USDA office, or write a letter addressed to USDA and provide in the letter all of the information requested in the form. To request a copy of the complaint form, call (866) 632-9992. Submit your completed form or letter to USDA by:

(1) mail: U.S. Department of Agriculture

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.