MENUS & MENU CYCLES
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: Menus & Menu Cycles*, you may use the following resources to learn more about "Menus & Menu Cycles" in MENU Module.

PRIMERO EDGE'S MENU PLANNING USER MANUAL

- Page 59-117

PRIMERO EDGE VIDEO TRAINING LIBRARY

- 1- Standard Menu Items
- 2- Menu Search
- 3- Create New Menu
- 4- Create Menu Cycle

BUILDING A MENU TEMPLATE

Best Practice: Create a menu template for each line before starting to build menus.

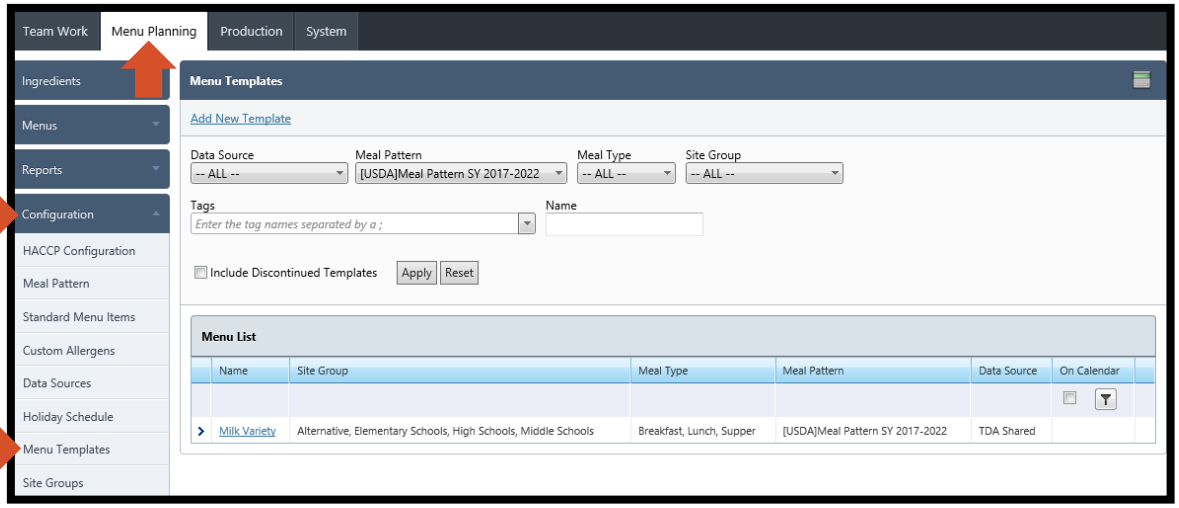
FAQs

Why should users build menu templates?

Menu templates help users build menus more quickly. Users can use a menu template to create the base offerings on all or most menus. Rather than creating a new menu every time, users start with a solid base and add the details that make each menu unique.

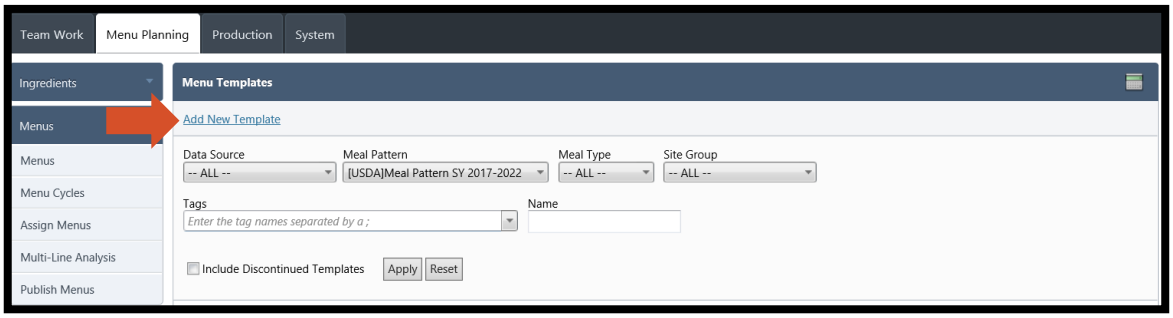
1. Click on the "Menu Planning" tab.
2. Click on the "Configuration" folder.
3. Click on the "Menu Templates" subfolder.
   Existing "Menu Templates" will display in the "Menu List" section.

Note: To search for a specific menu template, filter the search by selecting and entering any search criteria at the top of the page and clicking on the "Apply" button.



Note: Once users create a menu template, the system allows users to edit all of the "Menu Template" except for the "Meal Pattern" and "Meal Type." Users should discontinue or inactivate menu templates that they no longer wish to use.

4. Click on the "Add New Template" link.



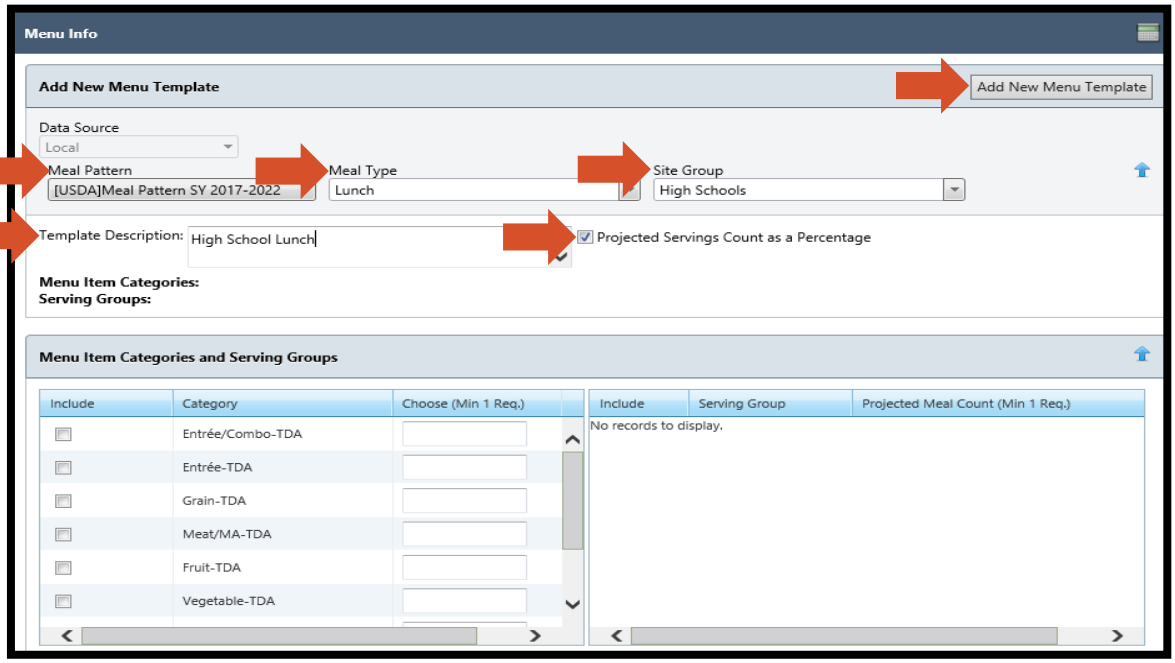
5. Select a "Meal Pattern," "Meal Type," and "Site Group" for the new template.
   Users can choose multiple "Meal Type(s)" and "Site Group(s)" for a menu template. Notice that users cannot change the "Data Source" from "Local."

Note: User's should choose "(USDA) Meal Pattern SY 2017-2022."

6. Optional: Select the "Projected Servings Count as a Percentage" box if you want the projected menu servings to show as a percentage of 100. For example, 20% of servings.

7. Enter a name for your template in the "Template Description" text box.

8. Click on the "Add New Menu Template" button.
   Notice that the system generates a table for "Menu Item Categories and Serving Group(s)."



9. Select one or more "Menu Item Categories" to include on the menu template in the "Include" column (left of the "Category" column).

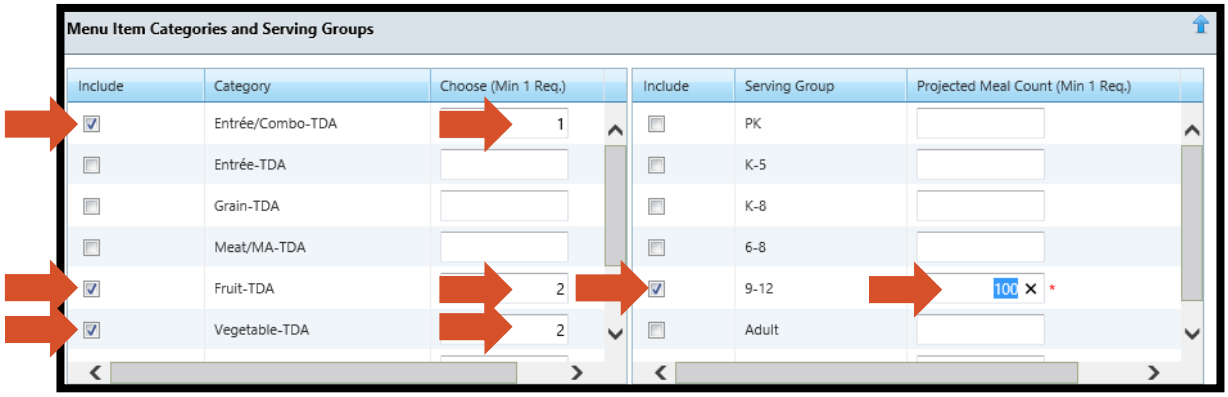
10. Enter the maximum number of choice(s) a student may make from each "Menu Item Categor(y)" selected.

11. Select one or more "Serving Group(s)" to include in the template in the "Include" column (left of the "Serving Group" column).

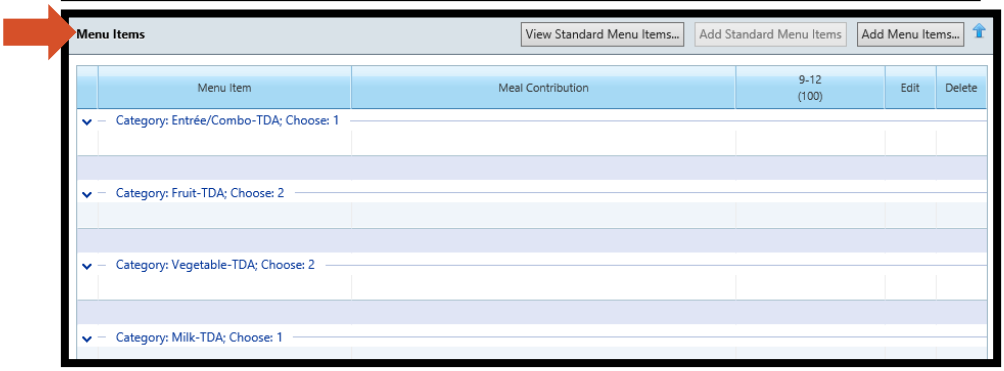
12. Enter "Projected Meal Count(s)" for each "Serving Group" selected.

    Enter the number of students you plan on serving from a specific "Serving Group" in the "Projected Meal Counts" column.

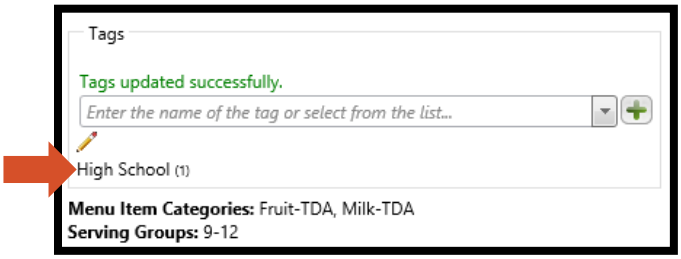
13. Click on the "Add New Menu Template" button again (pictured on the previous page).



Notice that the system generates a "Tags" and "Menu Items" section.



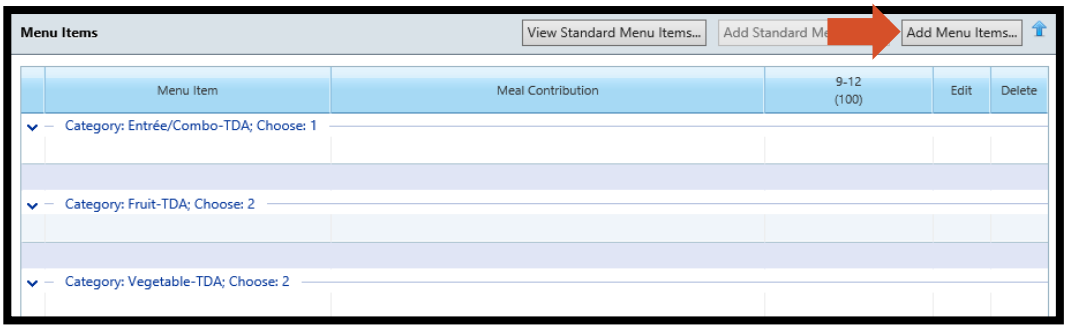
14. Optional: Add one or more "Tags" to the template by entering the tag name or selecting a tag category from the drop down box and clicking on the plus sign.



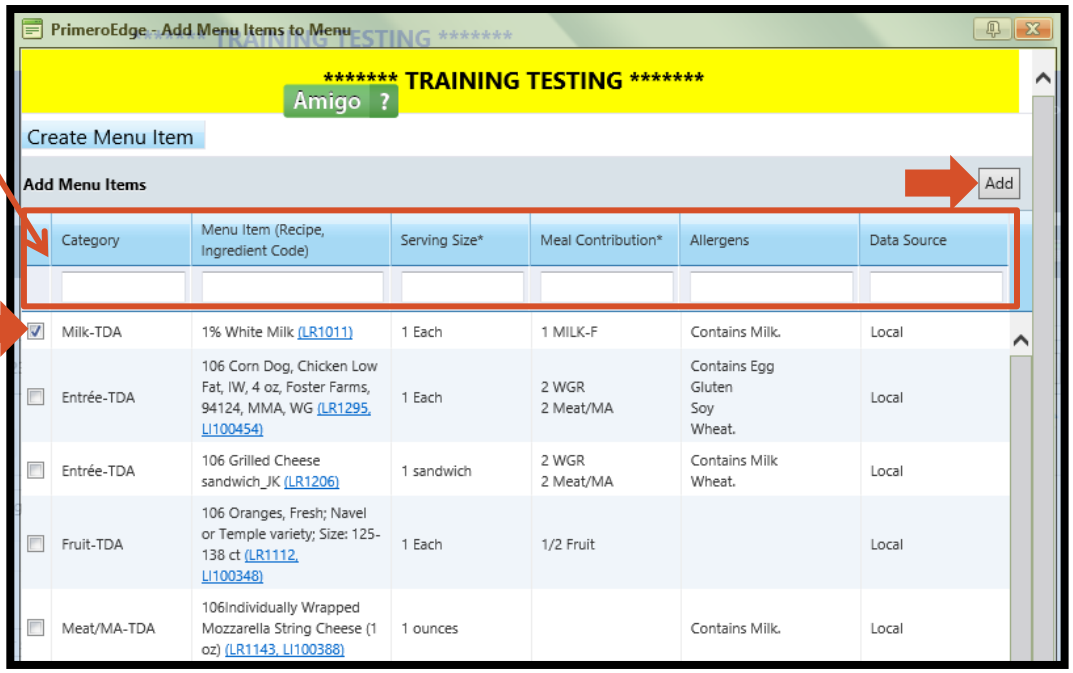
15. Scroll down to the "Menu Items" section. Add "Menu Items" to the template by clicking on the "Add Menu Items" button.
Notice that the system generates a window for searching for menu items to add to the menu template.

   a. Select one or multiple menu items by clicking on the check box(es) to the left of the listed menu items.

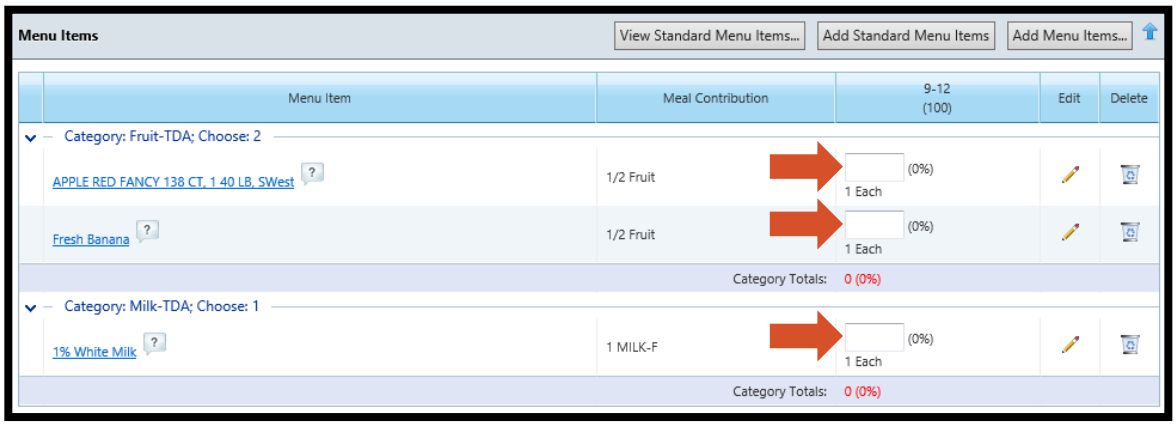
   b. Click on the "Add" button to add the selected menu items to the menu template.

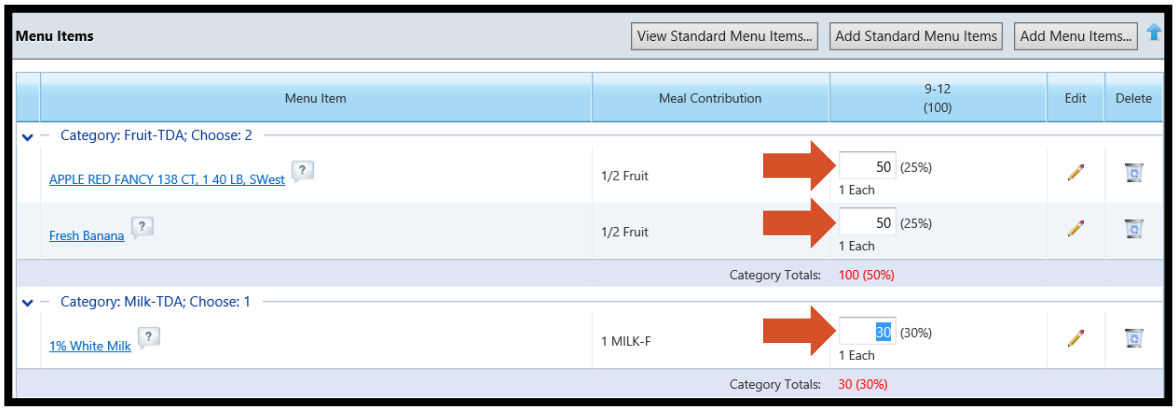


User's may filter their search here.



16. After adding all of the desired menu items to the template, enter projected servings for each menu item, for each "Serving Group" selected.



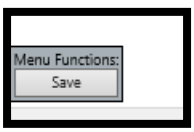


Tip: User's may enter a "0" for the projected servings to save the template without choosing projected servings.

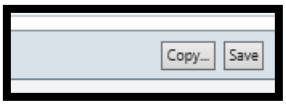
Note: Users may drag and drop menu items into different menu item categories by left clicking on the item, dragging the item to the desired menu item category, and dropping the item in the desired menu item category.

17. Click on the "Save" button to save the template.

Bottom left corner

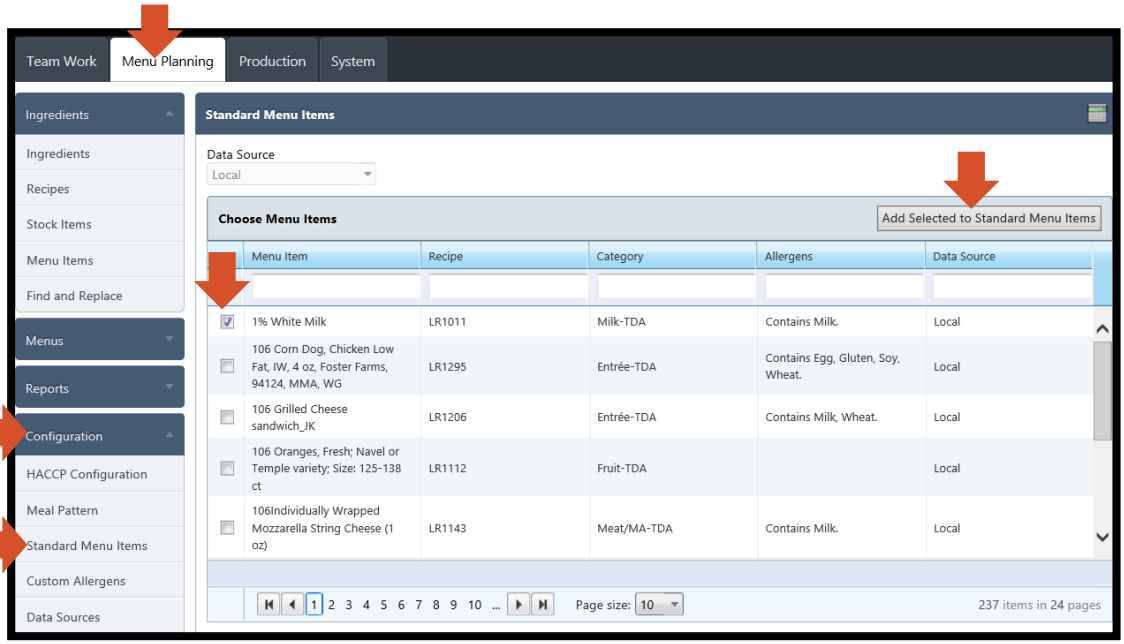


Top right corner

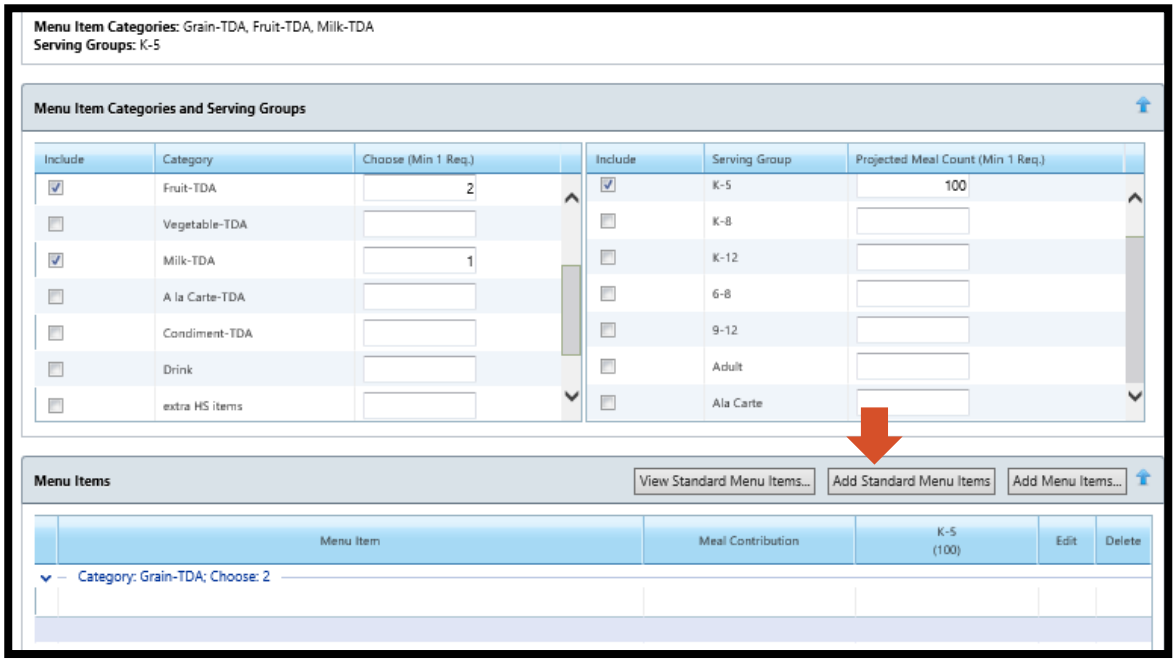


Standard Menu Items

Users may create "Standard Menu Items" (menu items to add to every menu, for example, milk, juice, condiments, etc.) and choose to add the standard menu items to menus. Click on the "Menu Planning" tab, "Configuration" folder, and "Standard Menu Items" subfolder to create "Standard Menu Items." Search for, and select the desired menu items and click on the "Add Selected to Standard Menu Items" button.



When creating a menu template or menu, users may select the "Add Standard Menu Items" button to add standard menu items to the menu template or menu.

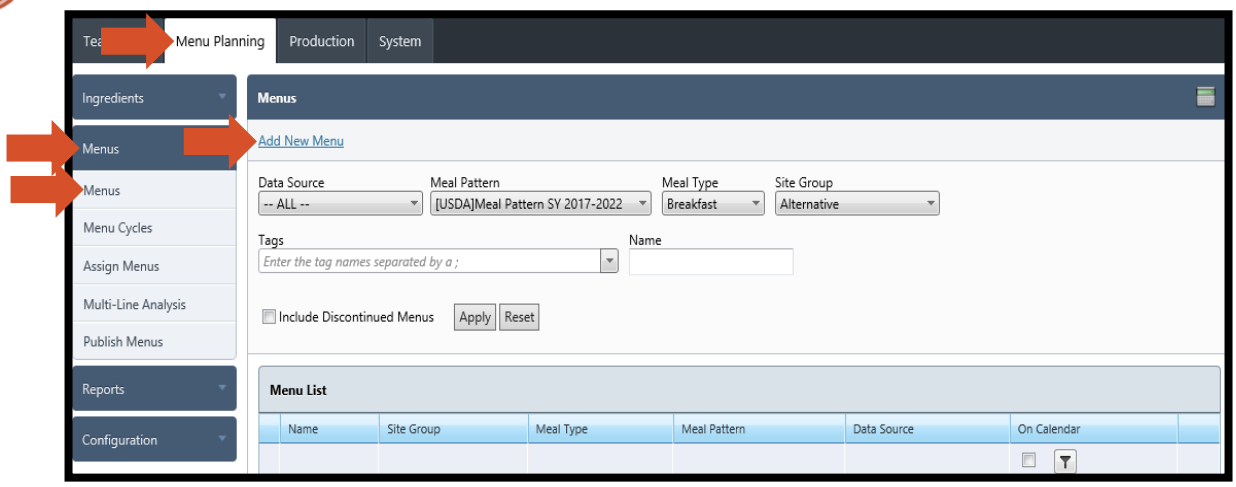


CREATING A MENU: BASIC INFORMATION

Best Practice: For greater success, build breakfast menus first, which typically contain fewer ingredients and more repetition than lunch menus.

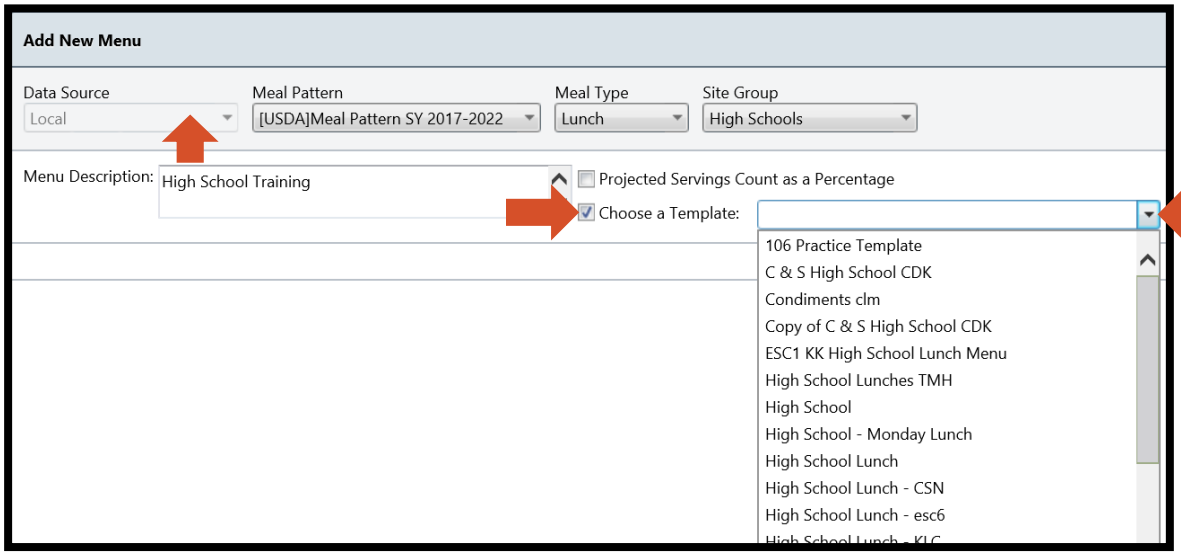
Best Practice: Build menus used at multiple sites first. Building multi-site menus allow users to make significant progress early on.

1. Click on the "Menu Planning" tab.
2. Click on the "Menus" folder.
3. Click on the "Menus" subfolder.
4. Click on the "Add New Menu" hyperlink.



Notice that all district created menus save to the "Local" database. Districts cannot change this setting.

5. **Optional: Click on the "Choose a Template" box to use a previously created menu template.**
   Any user created menu templates will display in the drop down box when clicking on the down arrow of the "Choose a Template" box.



6. **If not using a menu template, select a "Meal Pattern" from the drop down box.**
   In most instances, districts should select the "USDA Meal Pattern SY 2017-2022" "Meal Pattern."

7. **Select a "Meal Type" from the drop down box.**

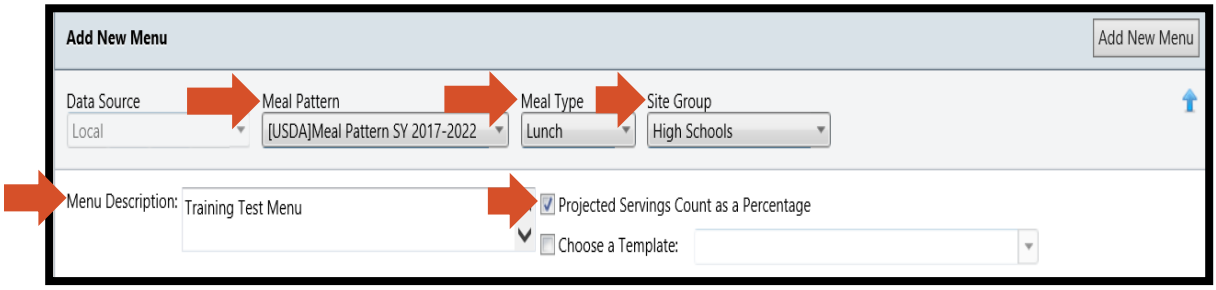
8. **Select a "Site Group" from the drop down box.**

Tip: Make the correct "Meal Pattern," "Meal Type," and "Site Group" selections for the menu. When users create a menu cycle, the "Meal Pattern," "Meal Type," and "Site Group" of the menu must match that of the menu cycle.

9. **Enter the menu name in the box labeled "Menu Description."**
   Make the name as simple or as descriptive as needed. For example, "Breakfast, Elem., Wk. 1."

10. **Optional: Click on the "Projected Servings Count as a Percentage" box for the projected menu item servings to show as a percentage of 100.**

11. **Click on the "Add New Menu" button.**



12. **Scroll down to the "Menu Item Categories and Serving Groups" section.**
Notice that the section on the left pertains to "Menu Item Categories" and that the section of the right pertains to "Serving Groups."

13. **In the "Menu Item Categories" section, click on each "Include" box (on the left-hand side of each menu item category) for each menu item to include on the menu.**

Note: To change the "Menu Item Categories" displayed in the "Category" column visit the "Menu Item Categories" Configuration subfolder (Menu Planning<Configuration<Menu Item Categories). Do not change the "Menu Item Categories" unless necessary.

14. **In the "Choose (Min1 Req.)" in the "Menu Item Categories" section, enter the number of choice(s) a student may make for each "Menu Item Categor(y)" selected.**

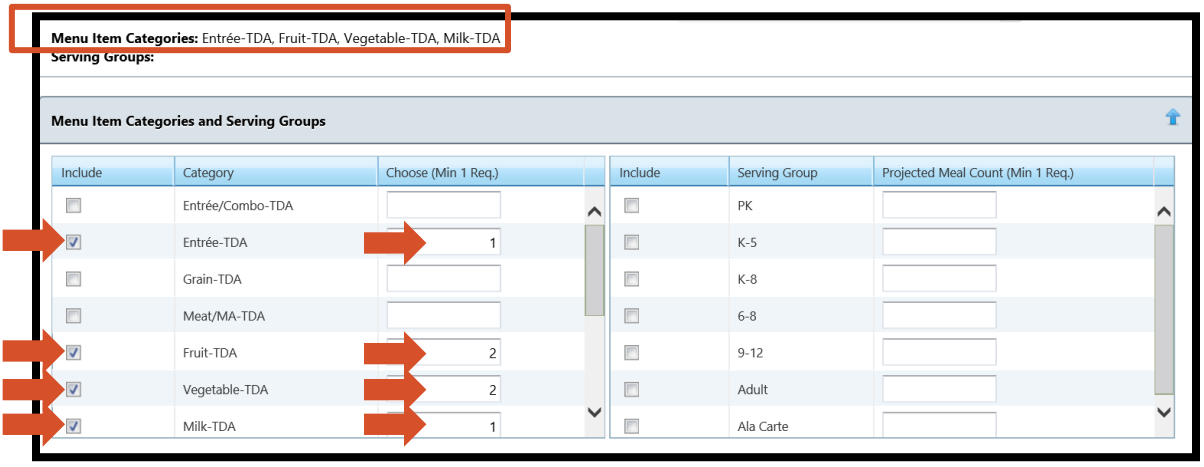
This amount should reflect the minimum number of servings the district must offer in order to meet the meal pattern requirements and to execute the menu as planned.

Example: For example, menu planners may plan to offer students one entrée serving, two fruit servings, two vegetable servings, and one milk serving.

Note: Selections made in the "Choose (Min1 Req.)" column apply to the offered menu and do not impact offer versus serve.

Example: For example, if the district offers high school students fruit in ½-cup servings, enter the number "2" in the "Choose (Min1 Req.)" for the "Fruit" category. This assures that the menu offers the student's one full cup (½ cup + ½ cup) of fruit but it does not stop students from choosing to take only ½ cup for OVS.

Notice that when users select "Menu Item Categories," the system generates a list of the selected "Menu Item Categories" following the word "Menu Item Categories."



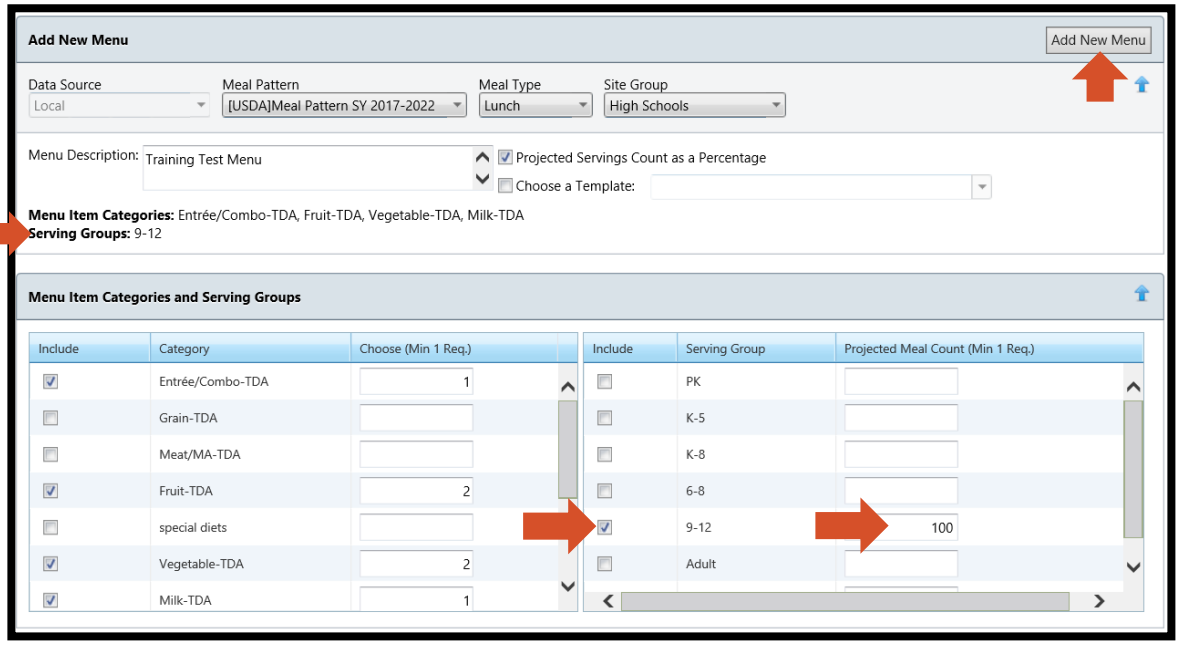
15. In the "Serving Group" section, click on the "Include" box to the left of each "Serving Group" to include on the menu.

Note: Users may select more than one "Serving Group" to serve more than one "Serving Group" the same menu.

Notice that when users select "Serving Group(s)," the system generates a "Serving Group(s)" list after the word "Serving Group(s)."

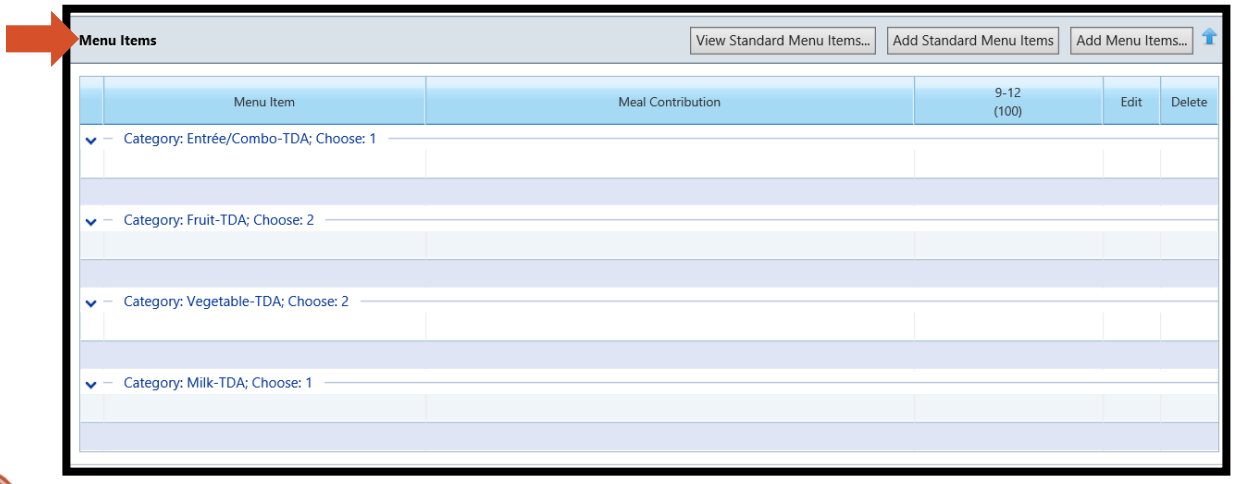
16. Enter the "Projected Meal Count" (Min1 Req.)" for each selected "Serving Group."

17. Click on the "Add New Menu" button.



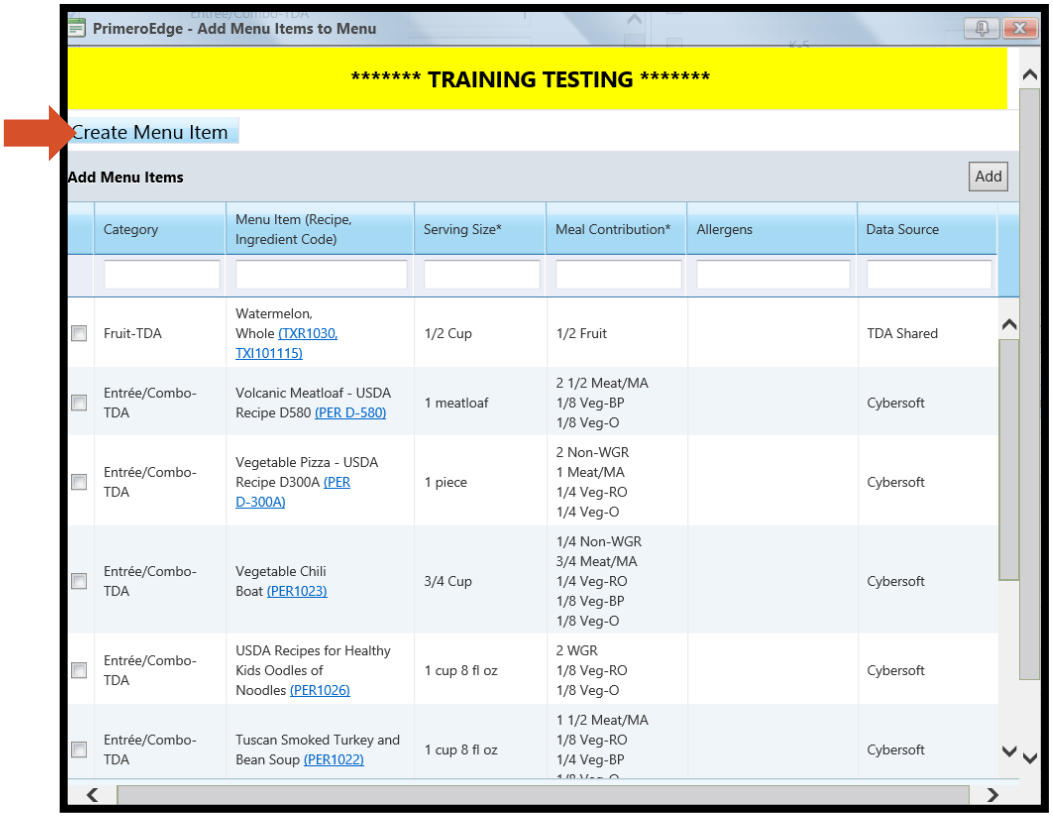
CREATING A MENU: ADDING MENU ITEMS

Notice that when users click on the "Add New Menu" button, the system saves the basic menu information and generates a "Menu Items" section where users can add the specific "Menu Items" that correspond to the menu.



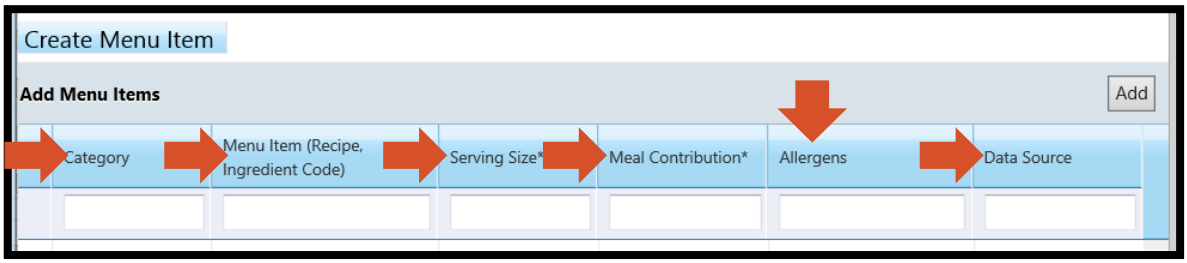
1. To add menu items to the menu, click on the "Add Menu Items" button.

The system generates a pop up window to search for and select menu items to include on the menu.



2. **Filter the search for menu items in the pop up window by entering information into the fields at the top of the columns. Filter the menu items search as follows: "Category," "Menu Item (Recipe, Ingredient Code)," "Serving Size*," "Meal Contribution*," "Allergens," and "Data Source."**

   - Category: Enter the full or partial name of the menu item "Category" for the menu item.
   - Menu Item (Recipe, Ingredient Code): Enter the full or partial menu item name or enter the recipe or ingredient code (for single ingredient recipes).
   - Serving Size: Enter the menu item serving size. Users may enter the exact words or part of the words listed in the 'Serving Size" column.
   - Meal Contribution: Enter the menu item "Meal Contribution." Users may enter the exact words or partial words in the "Meal Contribution" column.
   - Allergens: Enter one or more menu item "Allergens." If users enter more than one allergen, Users must enter the allergen the exact way that it appears in the "Allergen" column.
   - Data Source: Enter the "Data Source" for the menu item.



Enter as little or as much information desired to filter the search.

3. **Select the box next to each desired menu item.**
   Notice that users can select multiple menu items at one time.

4. **Click on the "Add" button to add menu items to the menu.**

Notice that the pop up screen closes and the selected menu items appear in the "Menu Items" table in their appropriate categories.

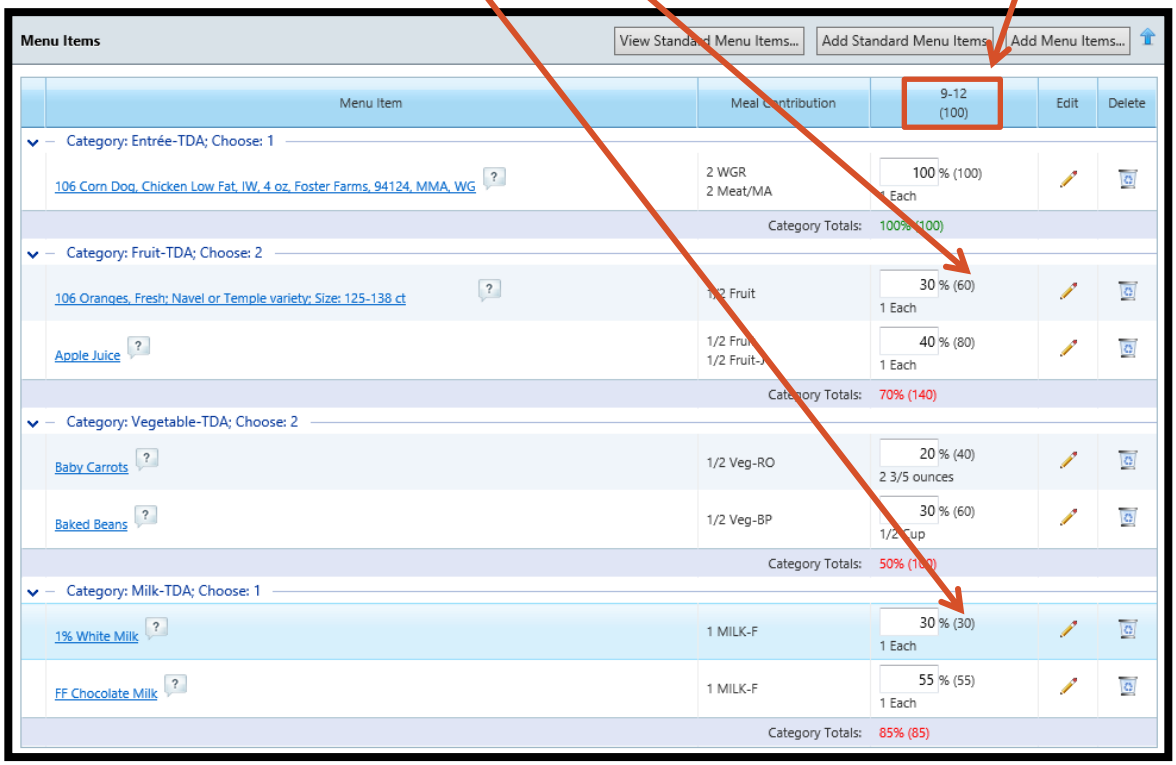
5. **Enter the projected servings for each menu item, for each serving group, in the column(s) between the "Meal Contribution" column" and the "Edit" column.**

Tip: Remember to base projected servings on the choices that students will make; for example, choosing one of two entrée choices or choosing meal components for offer versus serve.

Note: Remember that users who select the "Projected Servings Count as Percentages" box must enter projected servings as a percentage.

Users who select the "Projected Servings Count as Percentages" box should look at the number in parenthesis to determine the servings made by the percentage entered. In this example, in the "Fruit" category, where student may choose two options, 30 percent equates to 60 servings, and in the "Milk" category, where students may choose one option, 30 percent equates to 30 servings.

Serving Group: Top number
Projected Meal Counts: Bottom number



Note: Site staff, completing daily production plans, may also enter projected meal counts at the site level.

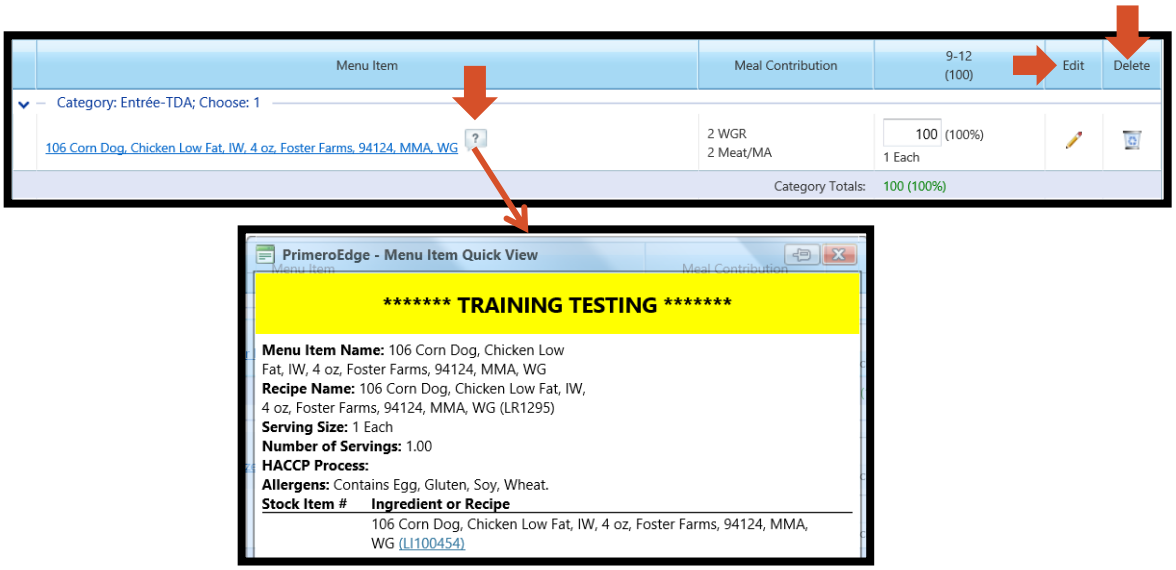
6. **Click on the "Save" button to save the projected servings for each menu item.** *Remember that the "Save" button is located at the bottom left corner and at the right, top corner of the page.*

Drag and Drop

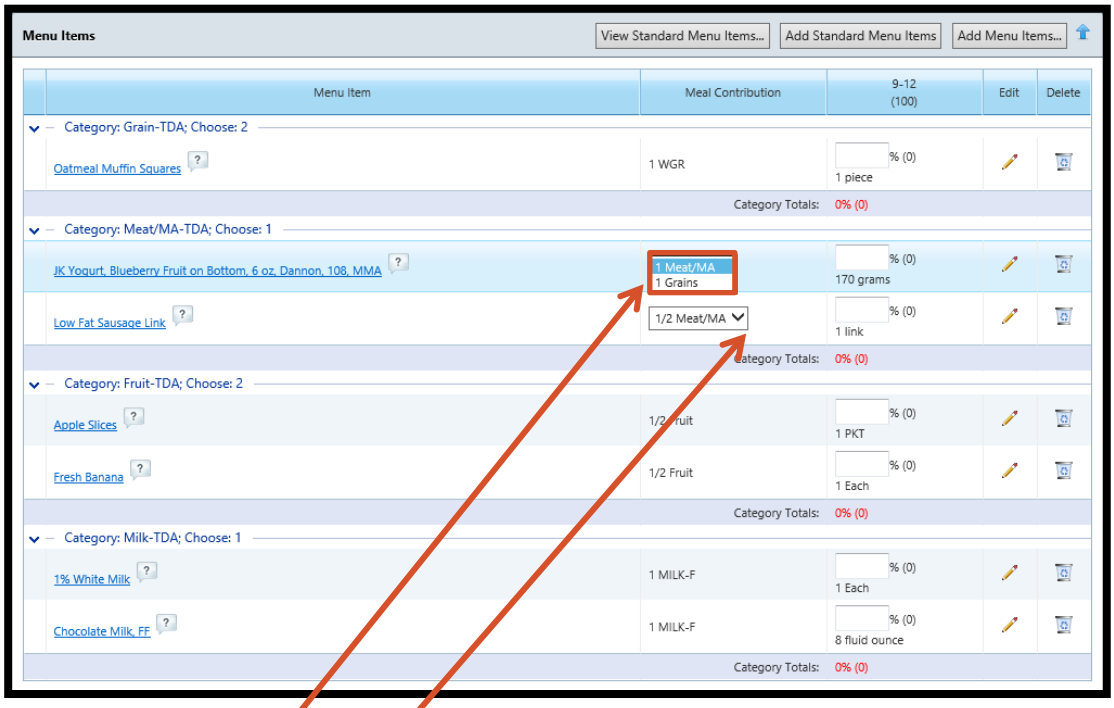
Use the mouse to drag and drop menu items from one "Menu Item Category" to another. Left click the menu item, drag the menu item to the desired "Menu Item Category," and release the click in the desired "Menu Item Category. For example, use drag and drop to move legumes from the "Vegetable" category to the "Entrée" category. Make sure to update any menu item categories affected by the changed menu item and click on the "Save" button. For example, if you move "Baked Chicken" from the "Meat/MA" category to the "Entrée" category, so that the menu displays with all entree items in the same category, scroll up to the "Menu Item Categories and Serving Groups" section and update the "Choose (Min 1 Req.)" row for the "Meat/MA" category with a "0."

Tips:

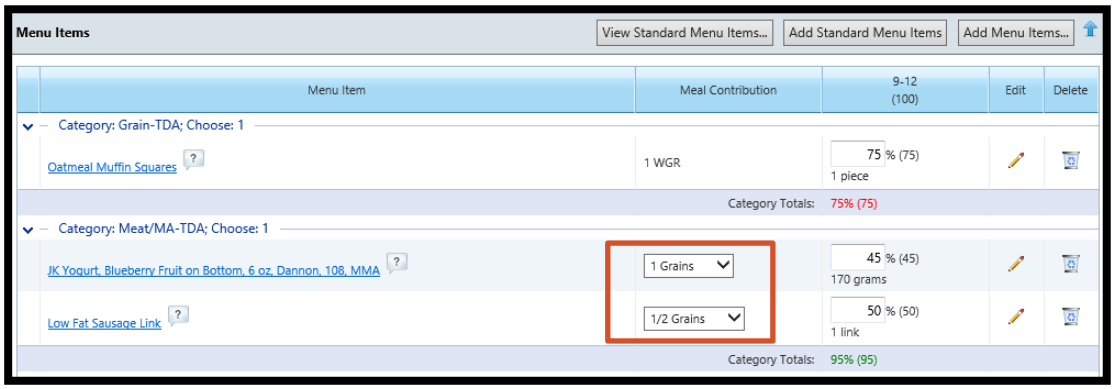
- Edit the menu item servings by clicking on the pencil icon to the right of the projected servings column and making the necessary changes.
- Delete a menu item from the menu by clicking on the trash bin icon to the right of the "Edit" column.
- Click on the question mark icons next to each listed menu item to quickly view information about each menu item.



Note: Users may substitute meat/meat alternates for grains at breakfast once users have placed a menu item providing at least 1 oz. eq. of grain (using an actual grain item) on the menu. MENU Module allows users to select the "Meal Contribution" for meat/meat alternates menu items at breakfast as "Meat/MA" or "Grains."



Click on the arrow next to the "Meal Contribution" drop down box to select the "Meal Contribution" for the "Meat/MA" menu item at breakfast.

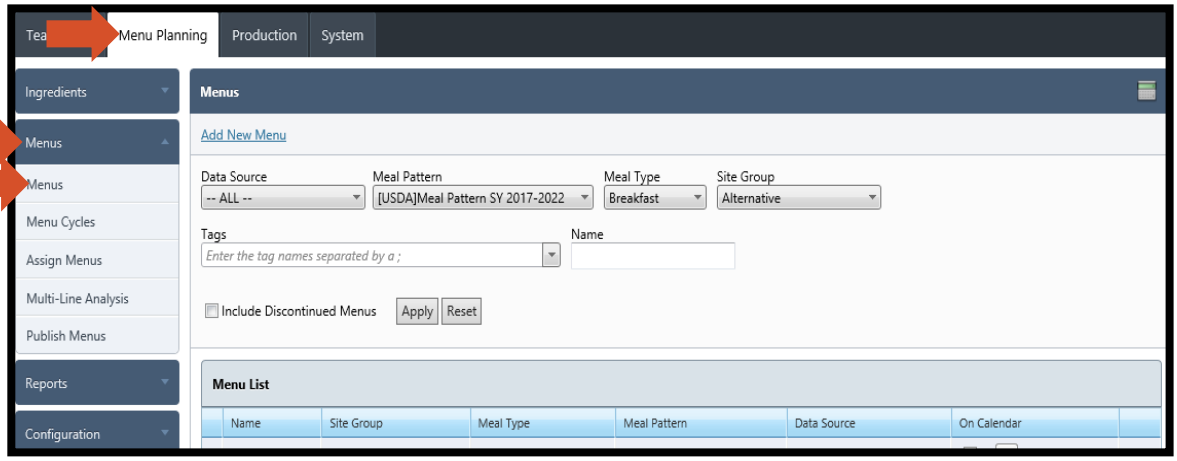


Standard Menu Items

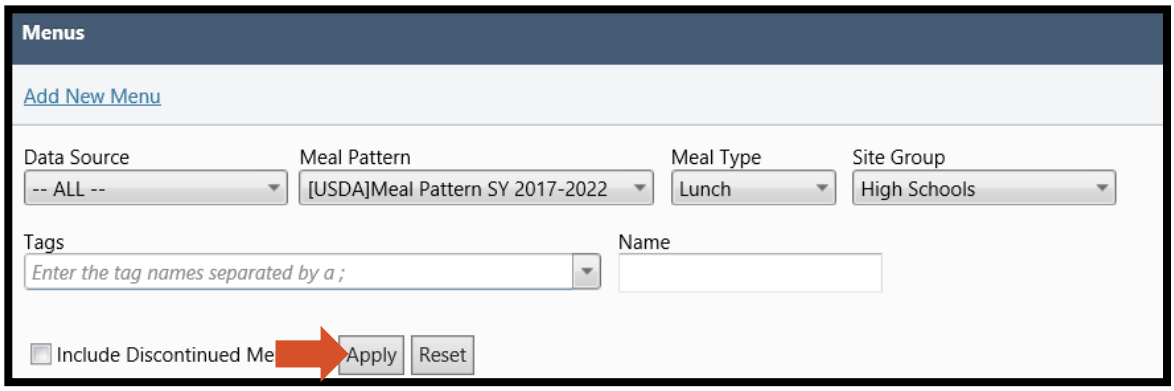
MENU Module allows users to set up "Standard Menu Items" that can help save time. Users may make "Standard Menu Items" from menu items, served daily (for example, milk, juice, and condiments.) Users may configure "Standard Menu Items" in the "Standard Menu Items" subfolder of the "Configuration" folder in the "Menu Planning" tab. Visit pg. 9 for more standard menu items information.

SEARCHING FOR MENUS

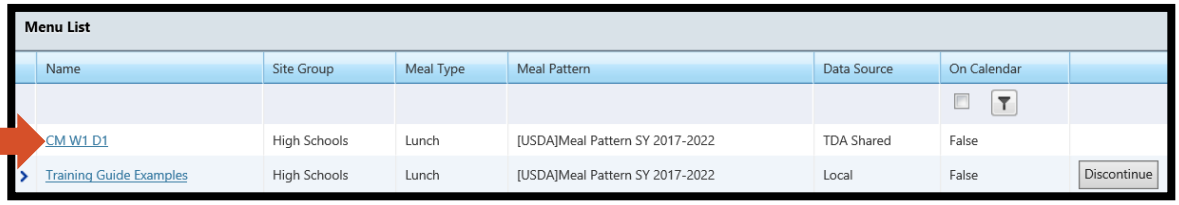
1. Click on the "Menu Planning" tab.
2. Click on the "Menus" folder.
3. Click on the "Menus" subfolder.



4. Enter and select criteria to narrow the search to a specific menu.
5. Click on the "Apply" button.



6. Click on the hyperlink for the specific menu.

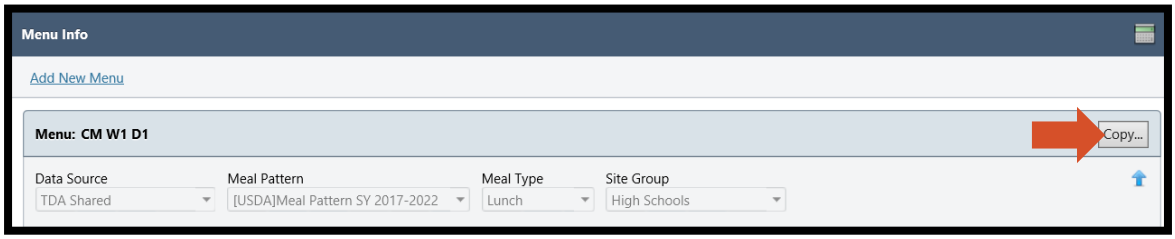


COPYING MENUS

1. Click on the "Menu Planning" tab.
2. Click on the "Menus" folder.
3. Click on the "Menus" subfolder.
4. Click on the hyperlink for the menu you want to copy.

Pictured on the previous page.

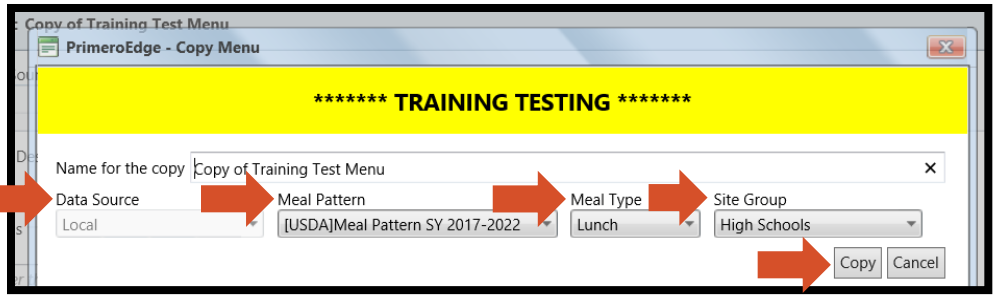
5. Click on the "Copy" button.



6. Enter a "Name for the copy."
7. Optional: Change any "Meal Pattern," "Meal Type," or "Site Group" information for the copy.

Note: Users cannot change the "Data Source" from "Local."

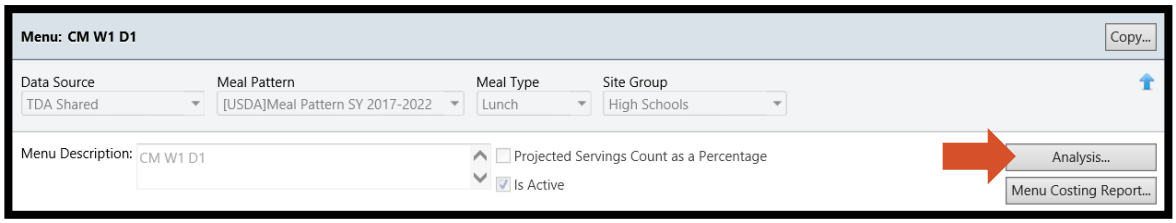
8. Click on the "Copy" button.
   Once a user creates the menu copy, the user may change the "Menu Item Categories," "Serving Groups," and "Menu Items" for the menu, as needed.



MENU REPORTS: ANALYSIS

1. Navigate to the menu you desire using the steps outlined on pg. 19.

2. **Click on the button labeled "Analysis."**
   The "Analysis" button is located at the bottom left corner of the page and near the top right section of the page.

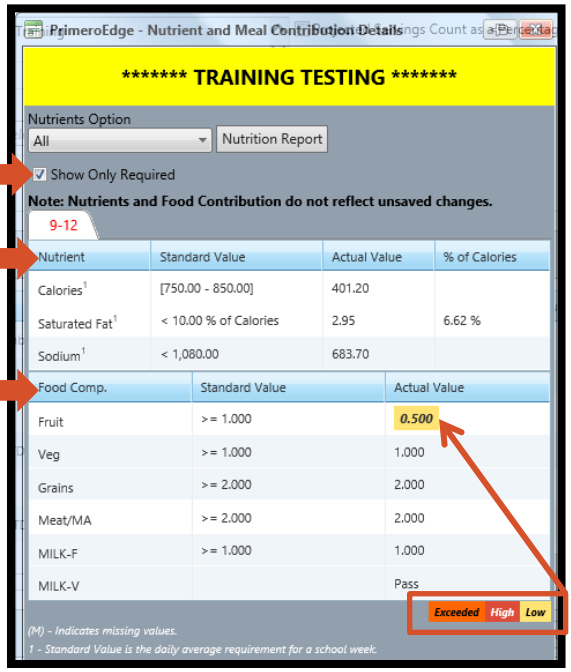


Notice that the system generates a "Nutrient and Meal Contributions Details" window. This window provides a quick view of whether the menu meets food component and nutrient standards.

Note: The system calculates nutrient standards for calories, sodium, and saturated fat as an average over the week.

Notice that the system automatically checks the "Show Only Required" box. A checked "Show Only Required" box directs the system to display the nutrients and meal components for federal standards for school meals.

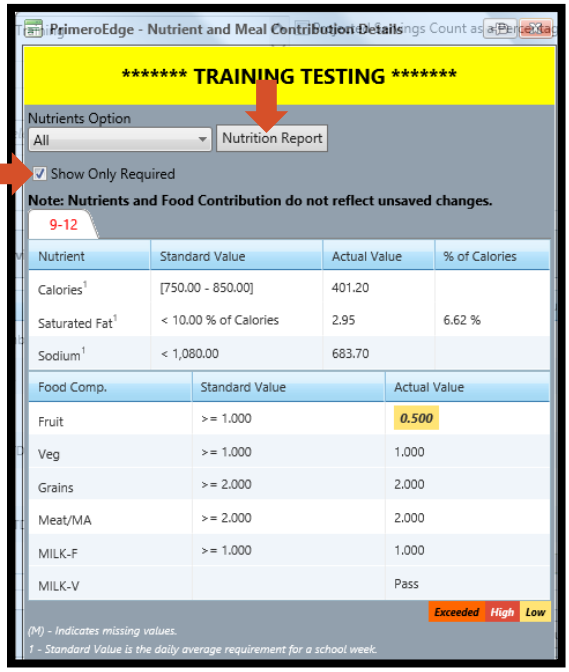
Notice that the system highlights the nutrients and meal components that do not meet the federal requirement as "Exceeded," "High," or "Low."



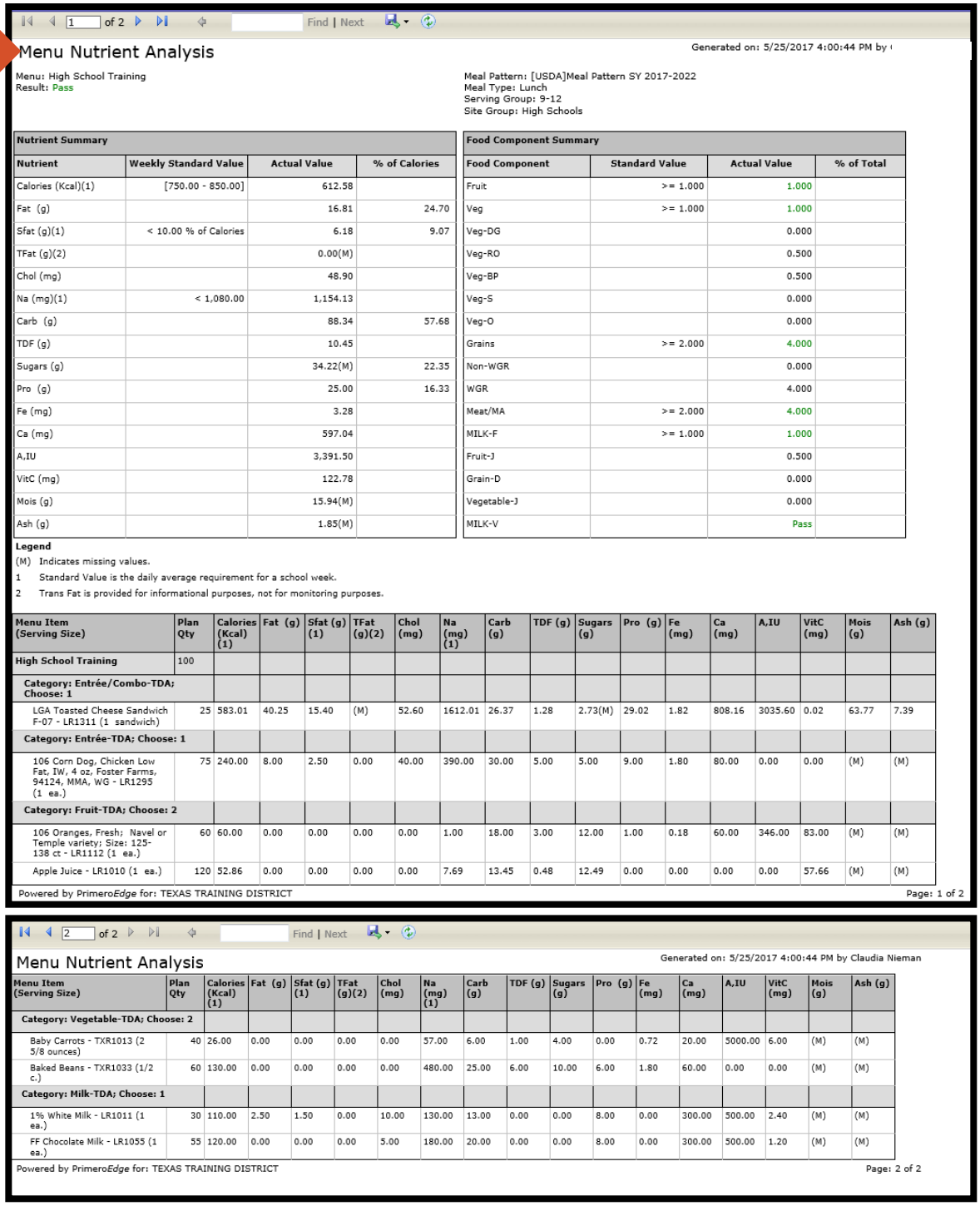
3. **Optional: Click on the "Show Only Required" box to remove the check mark and view other meal components (for example, vegetable subgroups) and other nutrients (for example, calcium, carbohydrates, or iron).**

4. **Optional: Click on the "Nutrition Report" button to view a report that provides a "Nutrient Summary," "Food Component Summary," and detailed menu item summary including nutrients for each menu item.**
   Notice that the system generates a window titled the "Menu Nutrient Analysis" (shown on the next page).

Tip: Use the "Menu Nutrient Report" to assess the overall nutrient and meal component compliance of the menu and identify specific menu items that affect the menu's compliance.



Example: "Menu Nutrient Analysis" report



1 of 2 Find | Next

Menu Nutrient Analysis

Generated on: 5/25/2017 4:00:44 PM by

Menu: High School Training
Result: Pass

Meal Pattern: [USDA]Meal Pattern SY 2017-2022
Meal Type: Lunch
Serving Group: 9-12
Site Group: High Schools

Nutrient Summary			
Nutrient	**Weekly Standard Value**	**Actual Value**	**% of Calories**
Calories (Kcal)(1)	[750.00 - 850.00]	612.58	
Fat (g)		16.81	24.70
Sfat (g)(1)	< 10.00 % of Calories	6.18	9.07
TFat (g)(2)		0.00(M)	
Chol (mg)		48.90	
Na (mg)(1)	< 1,080.00	1,154.13	
Carb (g)		88.34	57.68
TDF (g)		10.45	
Sugars (g)		34.22(M)	22.35
Pro (g)		25.00	16.33
Fe (mg)		3.28	
Ca (mg)		597.04	
A,IU		3,391.50	
VitC (mg)		122.78	
Mois (g)		15.94(M)	
Ash (g)		1.85(M)	

Food Component Summary			
Food Component	**Standard Value**	**Actual Value**	**% of Total**
Fruit	>= 1.000	1.000	
Veg	>= 1.000	1.000	
Veg-DG		0.000	
Veg-RO		0.500	
Veg-BP		0.500	
Veg-S		0.000	
Veg-O		0.000	
Grains	>= 2.000	4.000	
Non-WGR		0.000	
WGR		4.000	
Meat/MA	>= 2.000	4.000	
MILK-F	>= 1.000	1.000	
Fruit-J		0.500	
Grain-D		0.000	
Vegetable-J		0.000	
MILK-V		Pass	

Legend

(M) Indicates missing values.

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

2 Trans Fat is provided for informational purposes, not for monitoring purposes.

Menu Item (Serving Size)	Plan Qty	Calories (Kcal) (1)	Fat (g)	Sfat (g) (1)	TFat (g)(2)	Chol (mg)	Na (mg) (1)	Carb (g)	TDF (g)	Sugars (g)	Pro (g)	Fe (mg)	Ca (mg)	A,IU	VitC (mg)	Mois (g)	Ash (g)
High School Training	100																
Category: Entrée/Combo-TDA; Choose: 1																	
LGA Toasted Cheese Sandwich F-07 - LR1311 (1 sandwich)	25	583.01	40.25	15.40	(M)	52.60	1612.01	26.37	1.28	2.73(M)	29.02	1.82	808.16	3035.60	0.02	63.77	7.39
Category: Entrée-TDA; Choose: 1																	
106 Corn Dog, Chicken Low Fat, IW, 4 oz, Foster Farms, 94124, MMA, WG - LR1295 (1 ea.)	75	240.00	8.00	2.50	0.00	40.00	390.00	30.00	5.00	5.00	9.00	1.80	80.00	0.00	0.00	(M)	(M)
Category: Fruit-TDA; Choose: 2																	
106 Oranges, Fresh; Navel or Temple variety; Size: 125-138 ct - LR1112 (1 ea.)	60	60.00	0.00	0.00	0.00	0.00	1.00	18.00	3.00	12.00	1.00	0.18	60.00	346.00	83.00	(M)	(M)
Apple Juice - LR1010 (1 ea.)	120	52.86	0.00	0.00	0.00	0.00	7.69	13.45	0.48	12.49	0.00	0.00	0.00	0.00	57.66	(M)	(M)

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Menu Nutrient Analysis

Generated on: 5/25/2017 4:00:44 PM by Claudia Nieman

Menu Item (Serving Size)	Plan Qty	Calories (Kcal) (1)	Fat (g)	Sfat (g) (1)	TFat (g)(2)	Chol (mg)	Na (mg) (1)	Carb (g)	TDF (g)	Sugars (g)	Pro (g)	Fe (mg)	Ca (mg)	A,IU	VitC (mg)	Mois (g)	Ash (g)
Category: Vegetable-TDA; Choose: 2																	
Baby Carrots - TXR1013 (2 5/8 ounces)	40	26.00	0.00	0.00	0.00	0.00	57.00	6.00	1.00	4.00	0.00	0.72	20.00	5000.00	6.00	(M)	(M)
Baked Beans - TXR1033 (1/2 c.)	60	130.00	0.00	0.00	0.00	0.00	480.00	25.00	6.00	10.00	6.00	1.80	60.00	0.00	0.00	(M)	(M)
Category: Milk-TDA; Choose: 1																	
1% White Milk - LR1011 (1 ea.)	30	110.00	2.50	1.50	0.00	10.00	130.00	13.00	0.00	0.00	8.00	0.00	300.00	500.00	2.40	(M)	(M)
FF Chocolate Milk - LR1055 (1 ea.)	55	120.00	0.00	0.00	0.00	5.00	180.00	20.00	0.00	0.00	8.00	0.00	300.00	500.00	1.20	(M)	(M)

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Tip: Users who have entered incorrect recipe and/or menu item information should locate the recipes associated with the menu items, and make necessary changes in the "General," "Ingredients," "Nutrients," "Menu Item," "Allergens," or "Documents" tab.

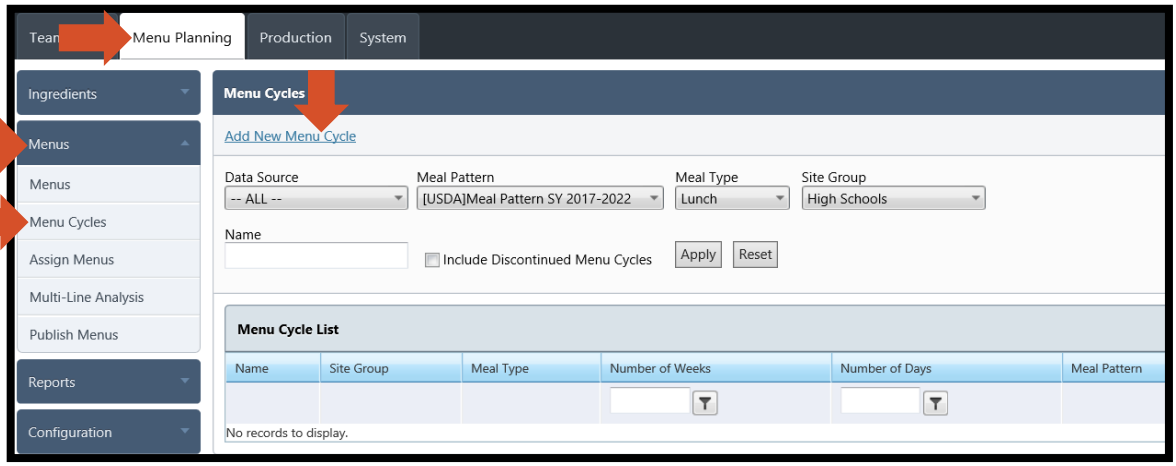
CREATING A MENU CYCLE: BASIC INFORMATION

FAQs

What is a menu cycle?
A menu cycle is a group of daily menus used for a span of time (weekly, monthly, etc.). The menu planner determines the length of the menu cycle.

Why should districts use menu cycles?
Using menu cycles saves time used creating menus from scratch. Using menu cycles reduces data entry in both the planning and production phases of using MENU Module.

1. Click on the "Menu Planning" tab.
2. Click on the "Menus" folder.
3. Click on the "Menu Cycles" subfolder.
4. Click on the "Add New Menu Cycle" hyperlink.
   Notice that the system takes users to a new screen where users can enter the new menu cycle information.



5. Enter the "Menu Cycle Name" in the box.
   Give the menu cycle a simple or descriptive "Menu Cycle Name" as needed.

   Notice that any district created menu cycle becomes part of the "Local" database and district users cannot change the "Data Source" from "Local."
6. Select a "Meal Pattern" from the drop down box.

In most instances, users should select the "USDA Meal Pattern SY 2017-2022" "Meal Pattern."

7. **Select a "Meal Type" from the drop down box.**

8. **Select a "Site Group" from the drop down box.**

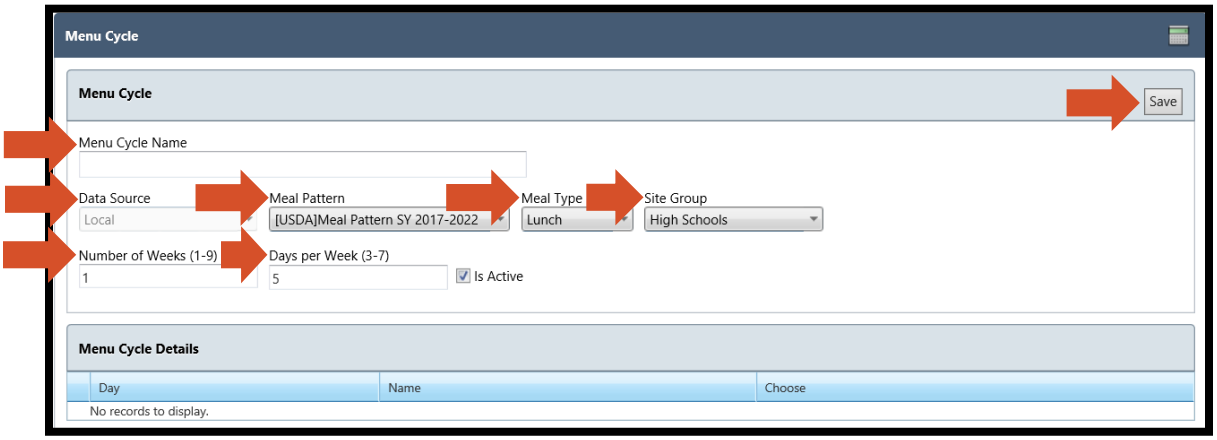
Note: When users create menu cycles, the "Meal Pattern," "Meal Type," and "Site Group" of the menu cycle must match that of the menus used in the menu cycle.

9. **Enter the "Number of Weeks (1-9)" that you want the menu cycle to contain.**

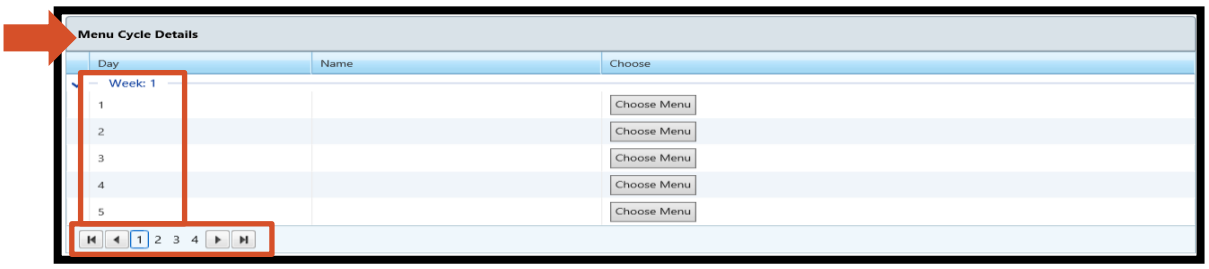
10. **Enter the "Days per Week (3-7)" that you want each week within the menu cycle to contain.**

    Notice that the system automatically checks the "Is Active" box to indicate that the menu cycle is active.

11. **Click on the "Save" button to save the menu cycle.**

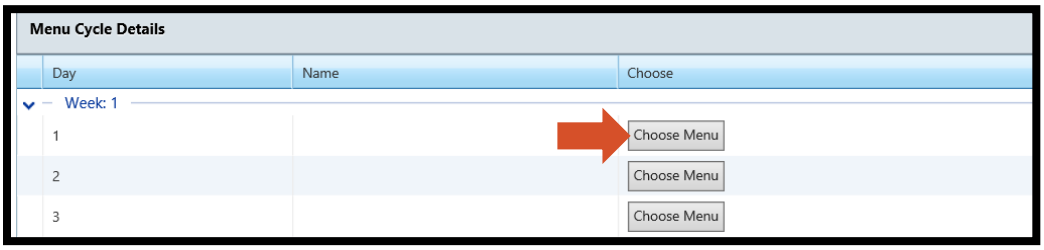


Notice that clicking on the "Save" button generates a new section labeled "Menu Cycle Details." The system displays one row for each day of each week of the menu cycle.

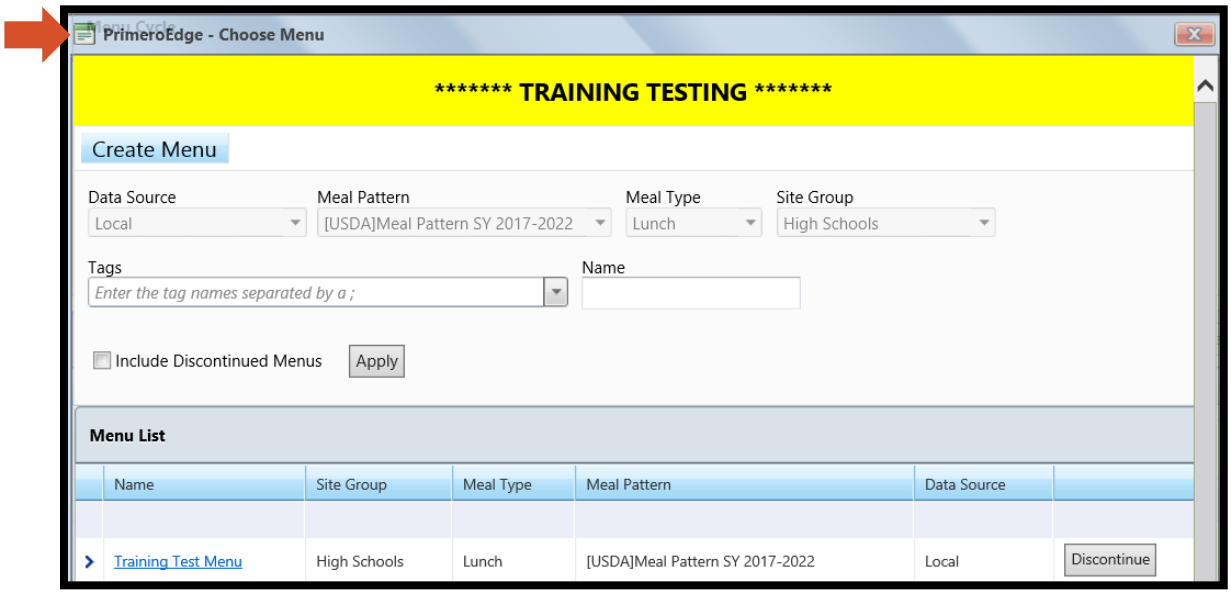


CREATING A MENU CYCLE: ADDING MENUS

1. Click on the "Choose Menu" button for the first day of the first week of the menu cycle.



Notice that the system generates a pop up search window so that users may search for menus serving the same "Meal Pattern," "Meal Type," and "Site Group" as the menu cycle.



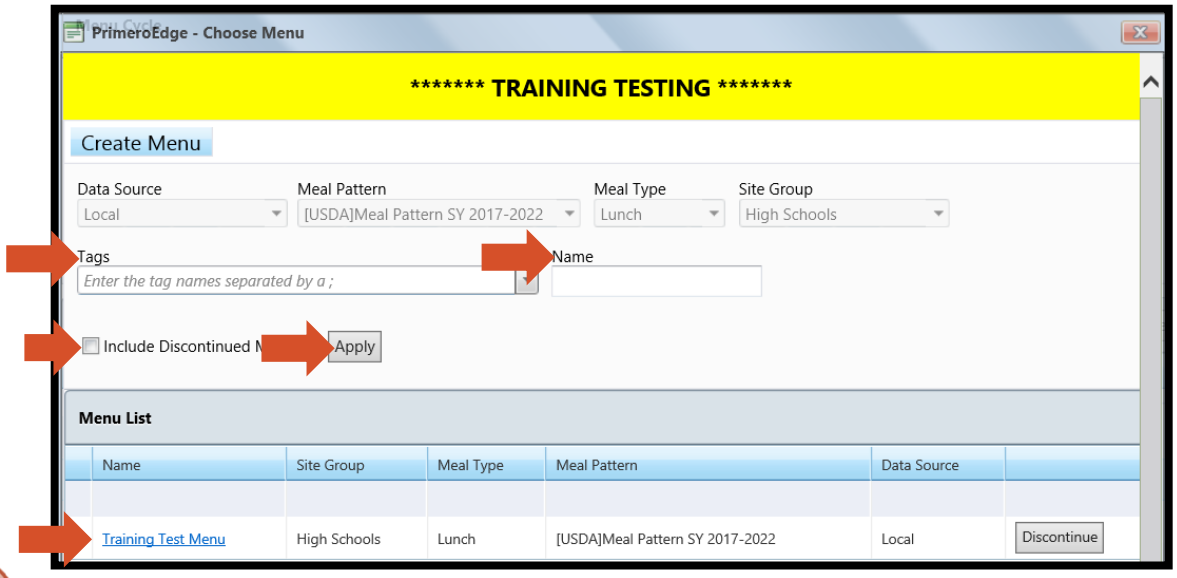
2. Optional: Enter any menu "Tags" to narrow the search for the desired menu.

3. Enter some of or the entire menu "Name" to search for the desired menu.

4. Click on the "Apply" button.

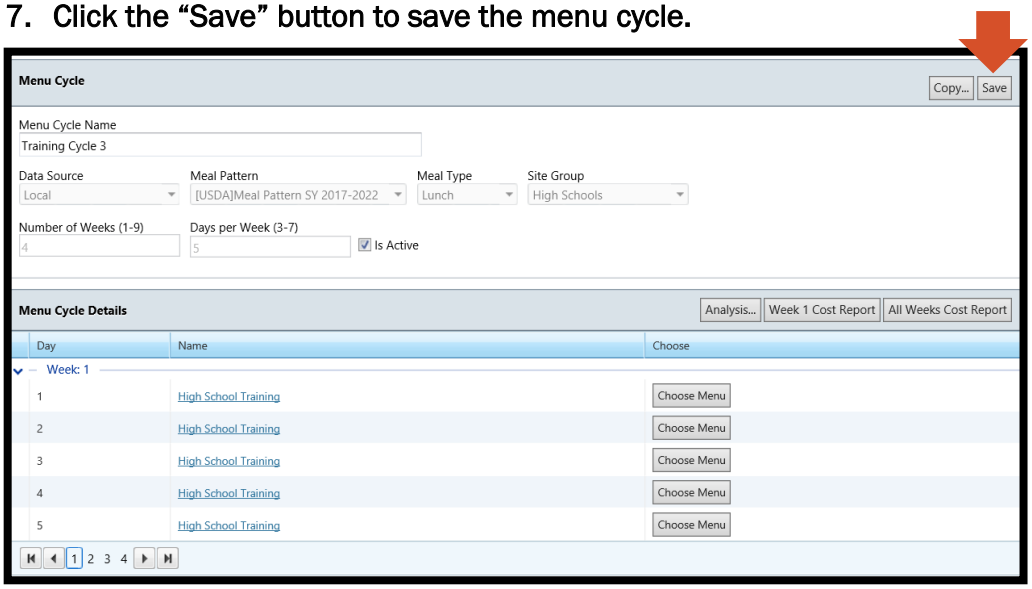
Note: Do not click the "Include Discontinued Menus" box unless necessary. Users must reactivate discontinued menus to use discontinued menus in a menu cycle.

5. Click on the hyperlink of the desired menu for the first day of the first week of the menu cycle.
   Notice that the system inserts the menu into the cycle and takes users back to the menu cycle page.



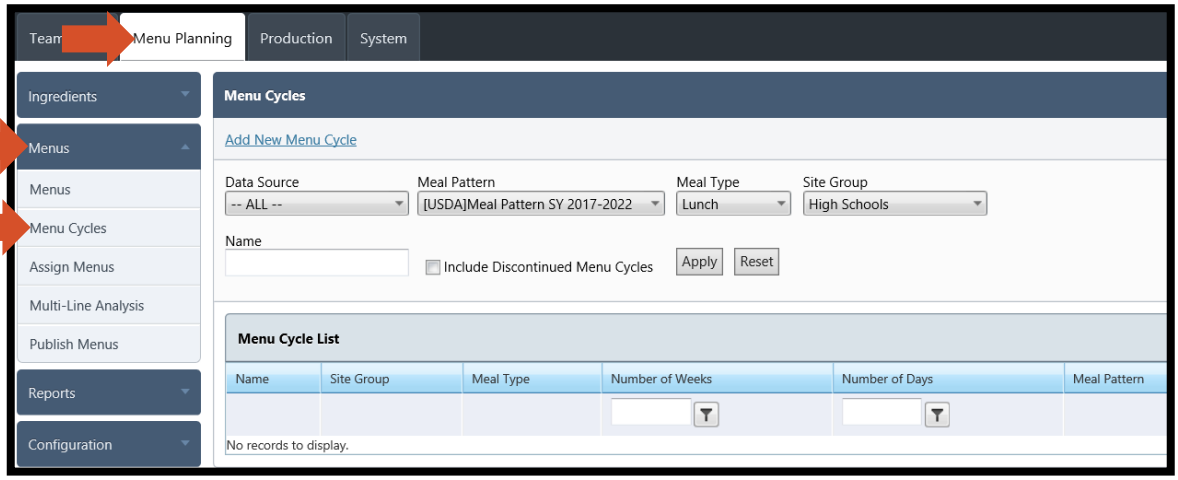
6. Repeat steps 1-5 for each day of each week of the menu cycle.

7. Click the "Save" button to save the menu cycle.



SEARCHING FOR MENU CYCLES

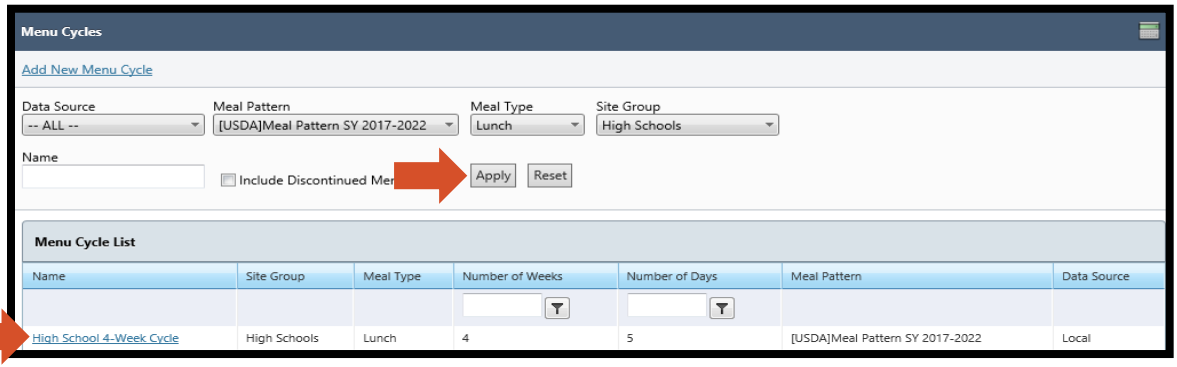
1. Click on the "Menu Planning" tab.
2. Click on the "Menus" folder.
3. Click on the "Menu Cycles" subfolder.



4. Select a "Data Source," "Meal Pattern," "Meal Type," and "Site Group," from the search criteria and enter the menu cycle "Name" to narrow the search to a specific menu cycle.

Note: Do not click the "Include Discontinued Menus" box unless necessary. Users must reactivate discontinued menu cycles to use discontinued menu cycles in a menu cycle.

5. Click on the "Apply" button.
6. Click on the hyperlink for the specific menu cycle.



COPYING MENU CYCLES

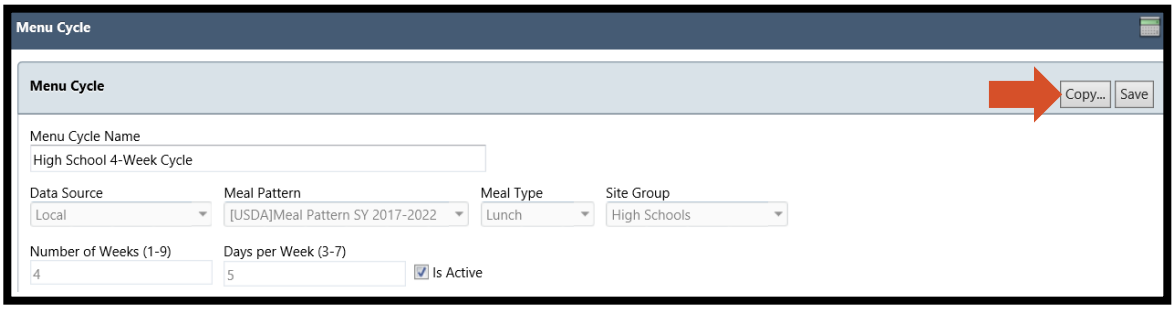
1. Click on the "Menu Planning" tab.
2. Click on the "Menus" folder.
3. Click on the "Menu Cycles" subfolder.

Pictured on the previous page.

4. Click on the hyperlink for the menu cycle to copy.

   Notice that the system takes the user to the menu cycle that the user clicks on.

5. Click on the "Copy" button for the menu cycle.

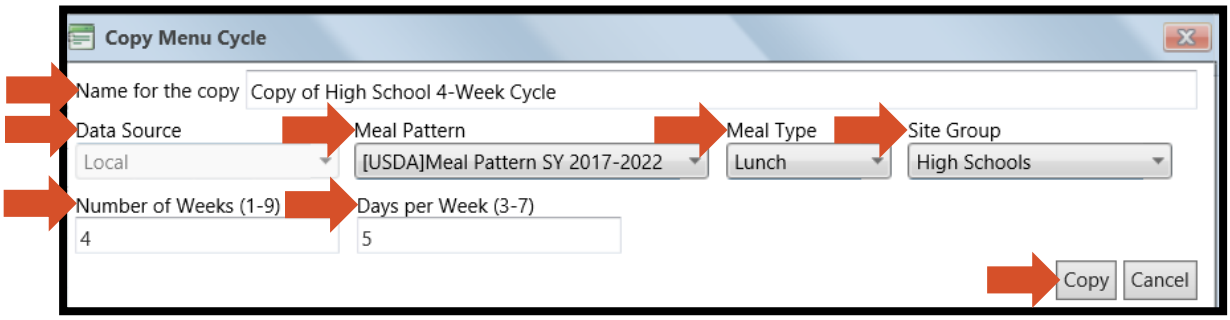


6. **Enter a "Name for the copy."**
   The system requires users to enter a unique name for each menu cycle, for a specific "Meal Type" and "Site Group." Users must enter a unique menu cycle name.

Note: District users cannot change the "Data Source" from "Local."

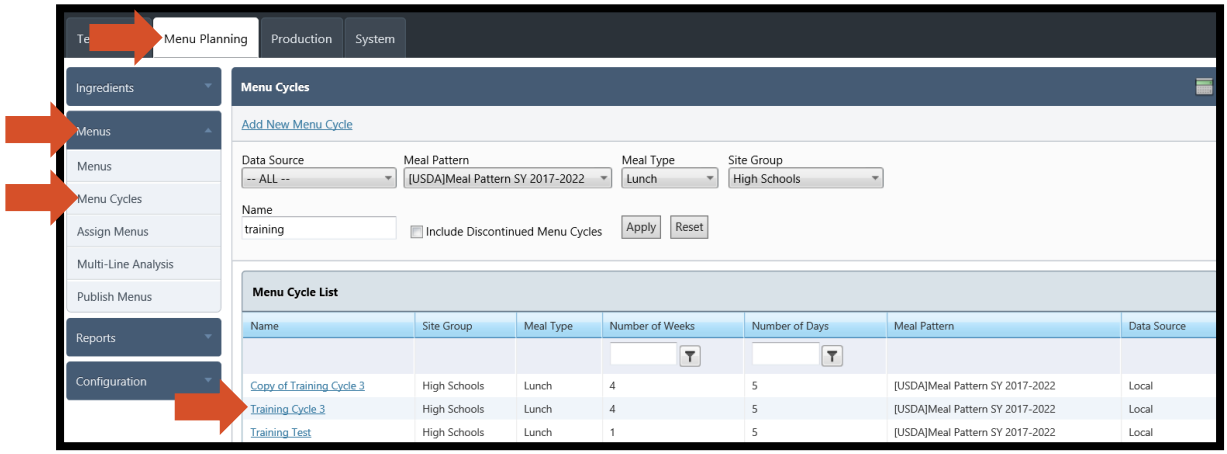
7. **Optional: Change the "Meal Pattern," "Meal Type," "Site Group," "Number of Weeks (1-9)," and/or "Days per Week (3-7)" information, as desired, for menu cycle copy.**

8. **Click on the "Copy" button.**
   Once a user creates a menu cycle copy, the user may change the menu cycle's daily menus as needed.

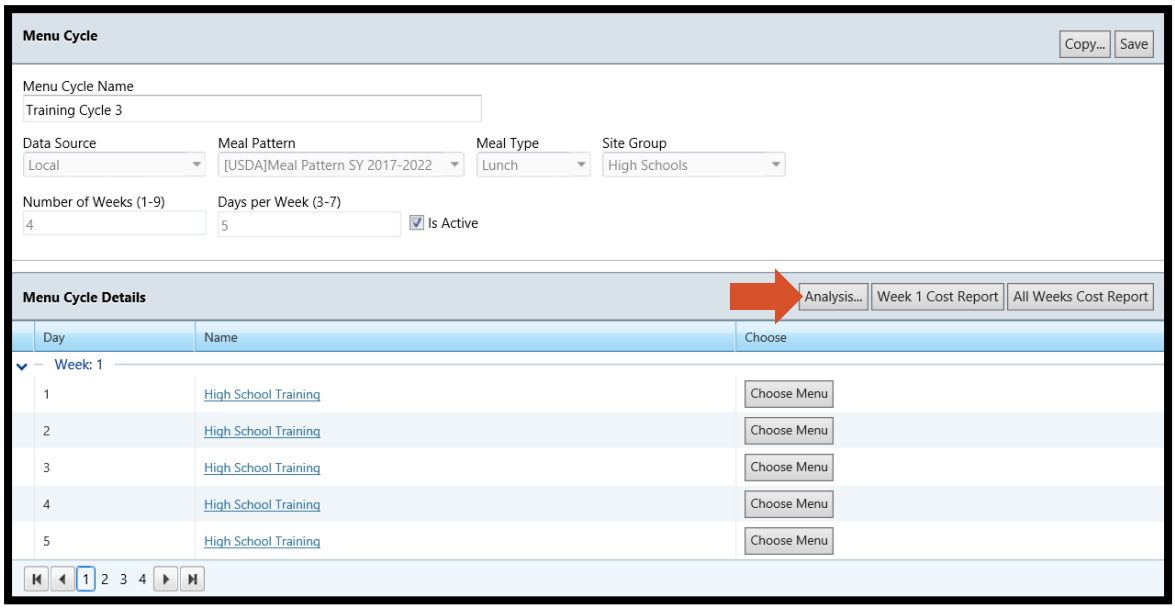


MENU CYCLE REPORTS

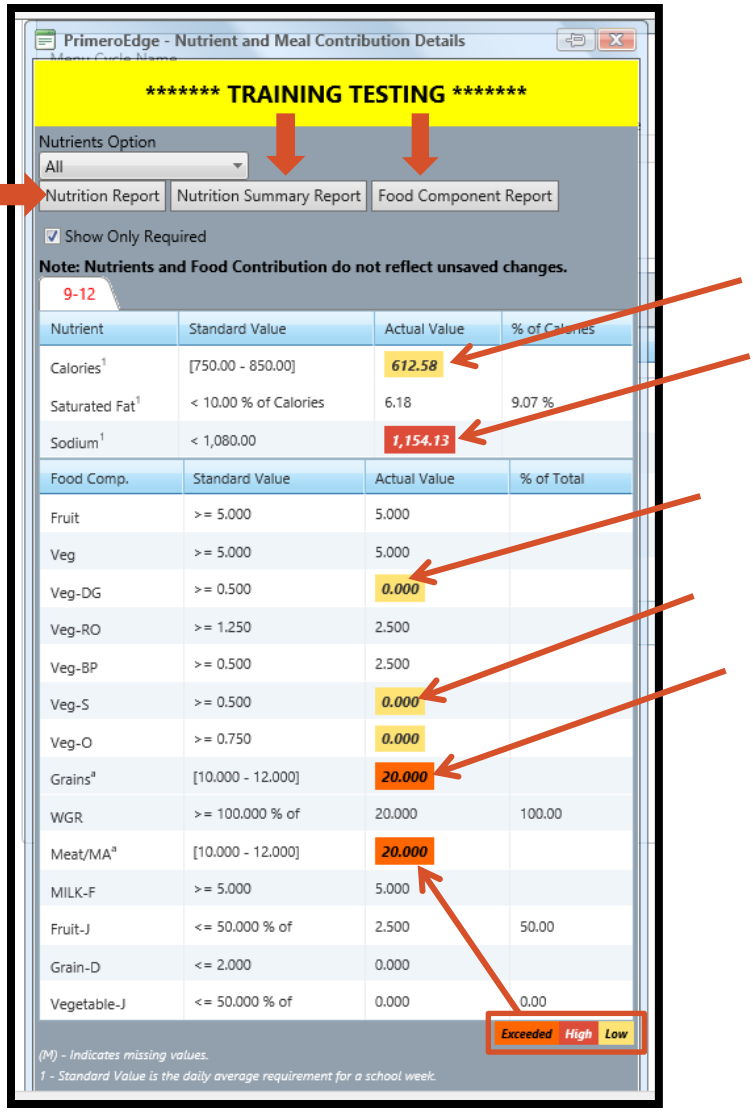
1. **To generate a menu cycle report, navigate to the desired "Menu Cycle."**
   Click on the "Menu Planning" tab. Click on the "Menus" folder. Click on the "Menu Cycles" subfolder. Click on the hyperlink of the desired menu cycle.



2. **Click on the "Analysis" button.**



Notice that the system generates a window containing "Nutrient" and "Food Component" summaries for the selected menu cycle.



Notice that the system highlights the nutrients and meal components that do not meet the federal requirement as "Exceeded," "High," or "Low."

Notice the three buttons "Nutrition Report," "Nutrition Summary Report," and "Food Component Report."

3. **Click on any of the three buttons, "Nutrition Report," "Nutrition Summary Report," or "Food Component Report" to generate the desired report for the selected menu cycle.**

   View the following page for information about each type of report.

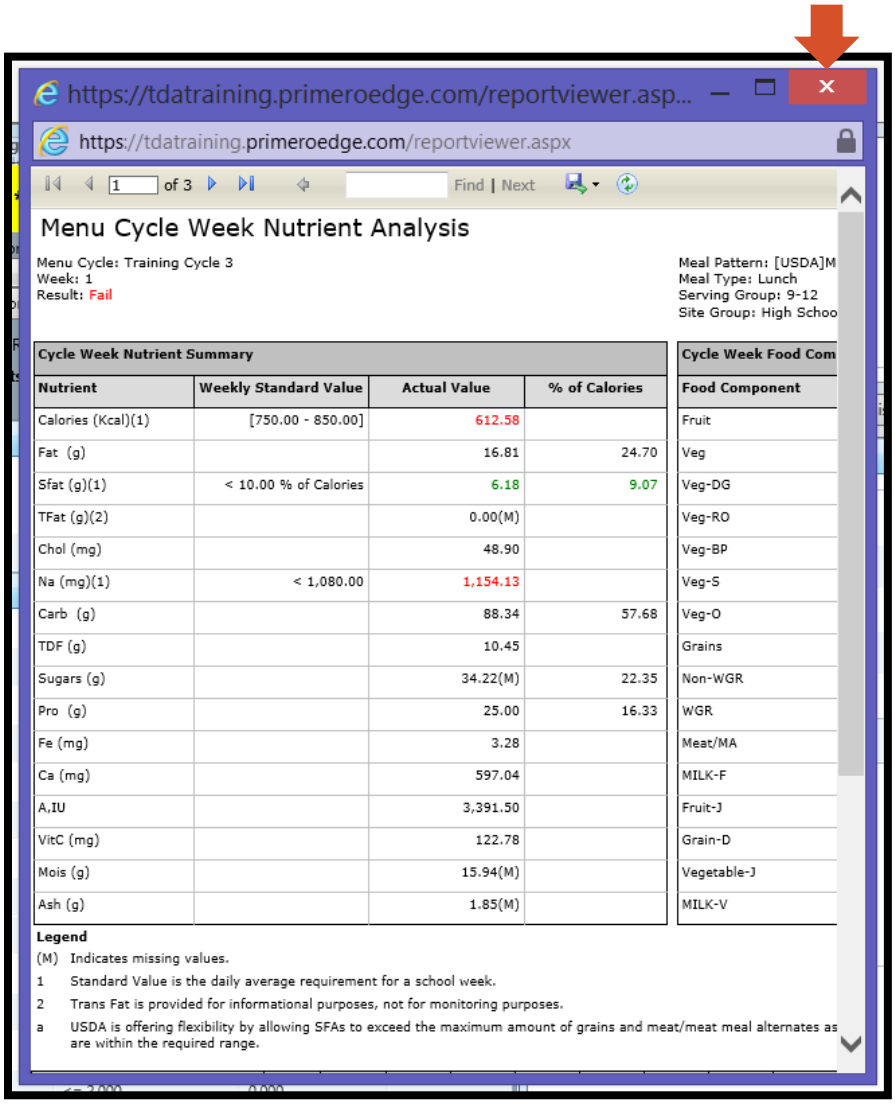
Note: The system assigns an "M" to nutrients marked as "Is Missing." Remember that the system calculates nutrients for each menu item from the ingredients used to make the menu item.

- **Nutrition Report:** The top portion of the "Nutrition Report" provides a summary of the nutrient and food component values for the menu cycle. The remaining report provides detailed nutrient information for each menu item.

- **Nutrition Summary Report:** The "Nutrition Summary Report" details nutrient values for daily menus, average nutrient values for weekly menus, and highlights when average nutrient values for weekly menus meet (in green) or do not meet (in red) the weekly nutrient standards.

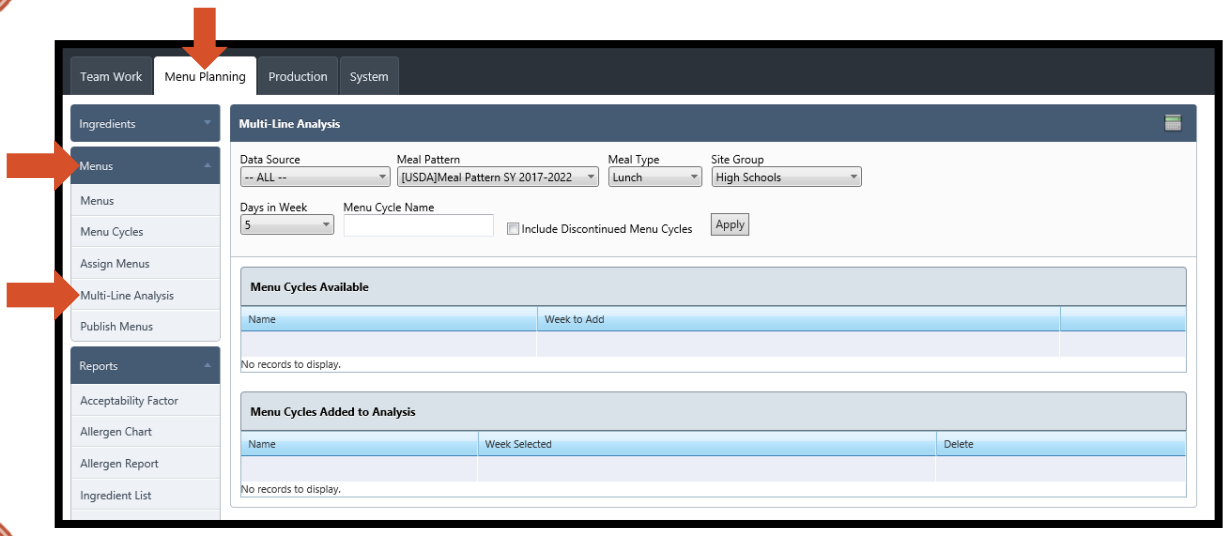
- **Food Component Report:** The "Food Component Report" shows how daily menus meet (or do not meet) food component values and assigns a "Pass" or "Fail" for meeting weekly food component values.

4. **After reviewing the desired report, click on the "X" button to close the window, exit the report, and return to the selected menu cycle "Analysis" window.**



MULTI-LINE ANALYSIS REPORTS

1. Click on the "Menu Planning" tab.
2. Click on the "Menus" folder.
3. Click on the "Multi-Line Analysis" subfolder.

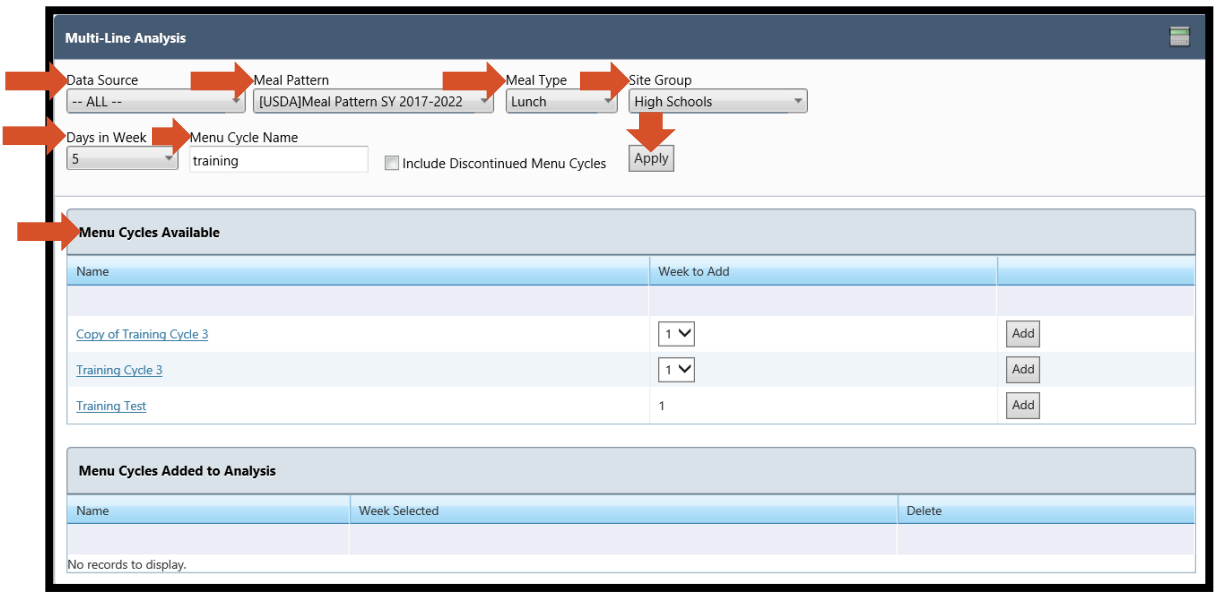


4. Select a "Data Source," "Meal Pattern," "Meal Type," "Site Group," and "Days in Week" to search for specific menu cycles to include in the "Multi-Line Analysis."

Note: Do not click the "Include Discontinued Menus" box unless necessary. Users must reactivate discontinued menu cycles to use discontinued menu cycles.

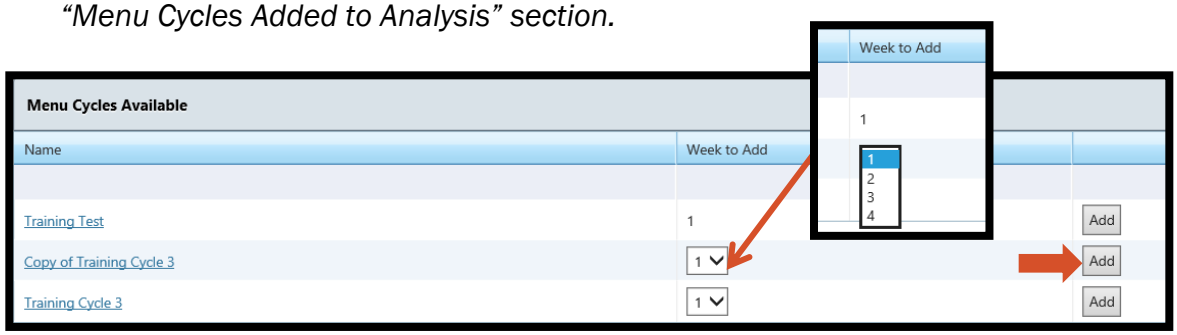
5. Optional: Enter some or part of the "Menu Cycle Name" to include in the search.

6. Click on the "Apply" button.
   Notice that they system generates a table titled "Menu Cycles Available" (shown on the next page).

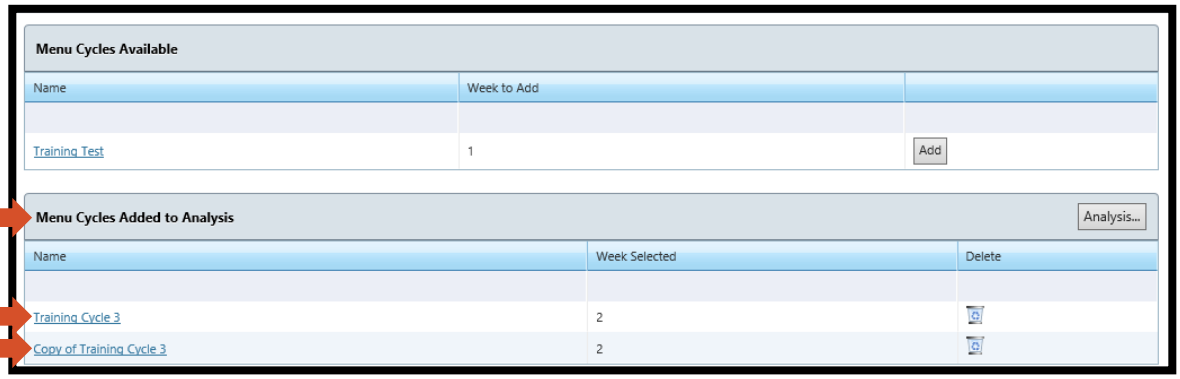


7. Select a "Week to Add," if applicable, from the desired menu cycle.

8. Click on the "Add" button for the desired menu cycle(s).
   Notice that the system moves the selected and added menu cycle to the "Menu Cycles Added to Analysis" section.



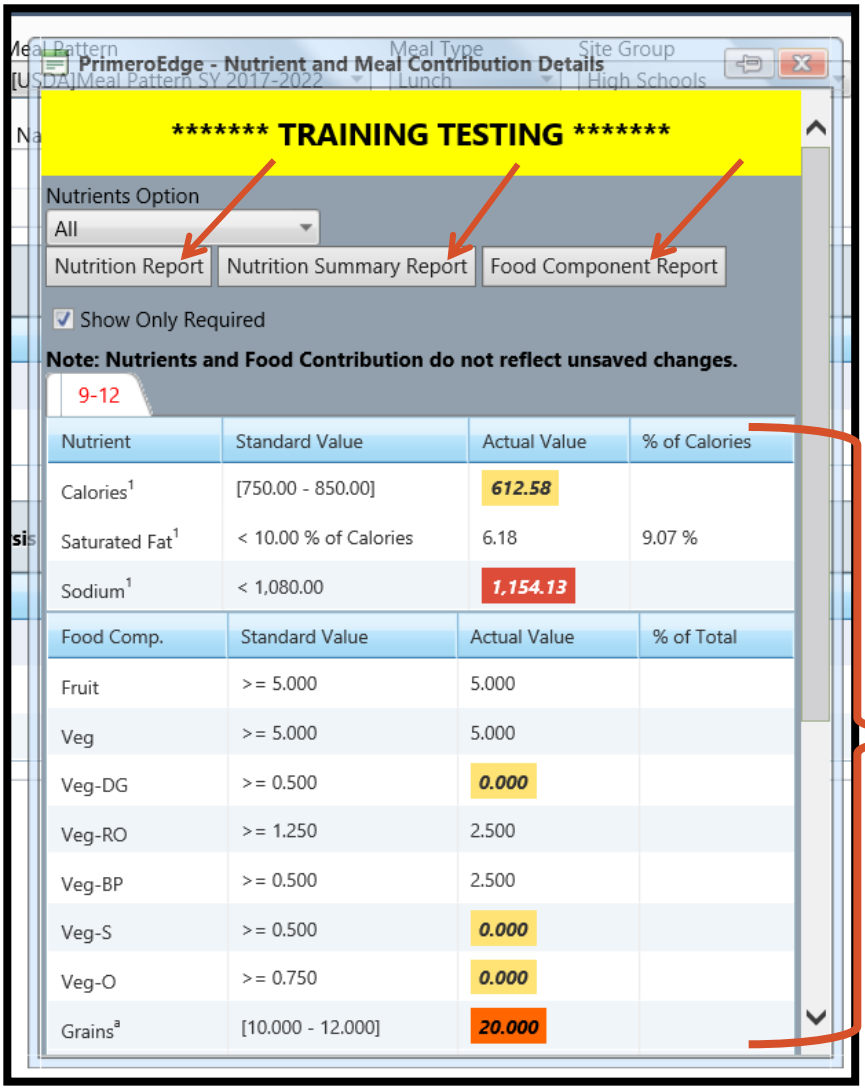
9. Continue adding menu cycles until the "Menu Cycles Added to Analysis" section contains all of the desired menu cycles.



10. Click on the "Analysis" button.
Notice that the system generates a window containing "Nutrient" and "Food Component" summaries for the selected menu cycles.

Note: View pg. 31-32 of this "User's Guide" for more details on how to interpret and view reports after selecting the "Analysis" button.

Note: Read pg.107-117 of "Primero Edge's Menu Planning User Manual" for more information on Multi-Line Analysis.



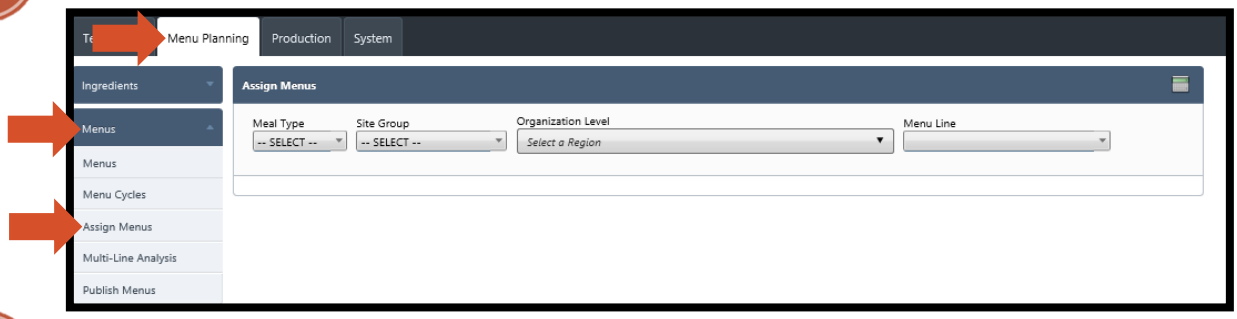
ASSIGNING A MENU CYCLE TO PRODUCTION CALENDAR

FAQ

How do site staff access menu cycles for production?

For site staff to use menu cycles for production, users must first assign the menu cycle to the production calendar.

1. Click on the "Menu Planning" tab.
2. Click on the "Menus" folder.
3. Click on the "Assign Menus" subfolder.

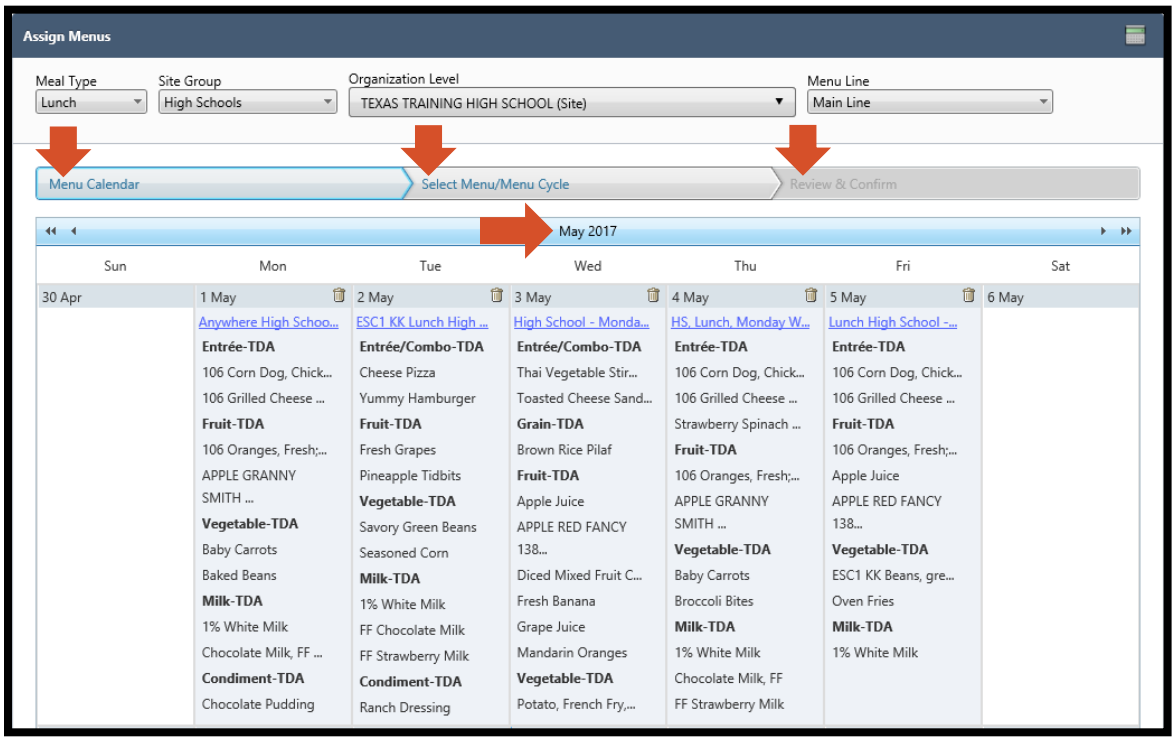


4. Select the "Meal Type" that you want to assign to the calendar.
5. Select the "Site Group" from the drop down box for the menu that you want to assign to the calendar.
6. Select an "Organization Level" from the "Organization Level" drop down box. *Notice that users may choose the district as the "Organization Level," which allows users to assign the menu to all sites from the selected site group, or users may select a specific site.*

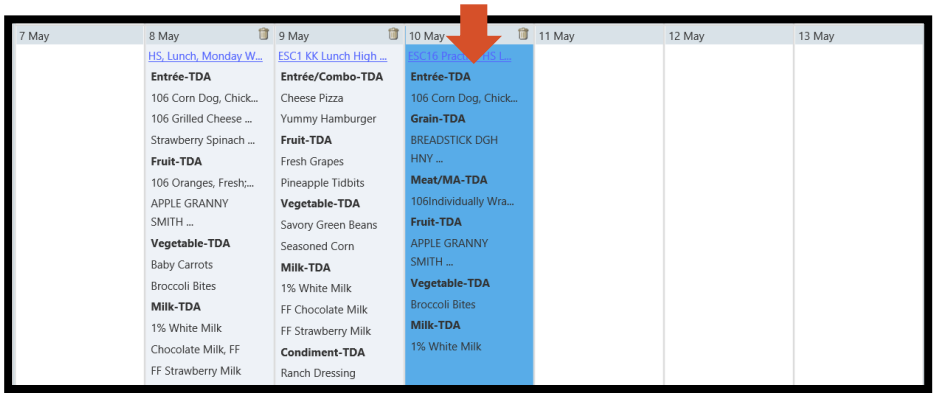
7. **Select a menu line from the "Menu Line" drop down box.**
   The "Menu Line" drop down box contains district configured menu lines.

Note: To configure and edit menu lines, visit the "Menu Lines" subfolder in the "Configuration" folder of the "Menu Planning" tab.

Notice that the system generates a new window with three tabs and a calendar.

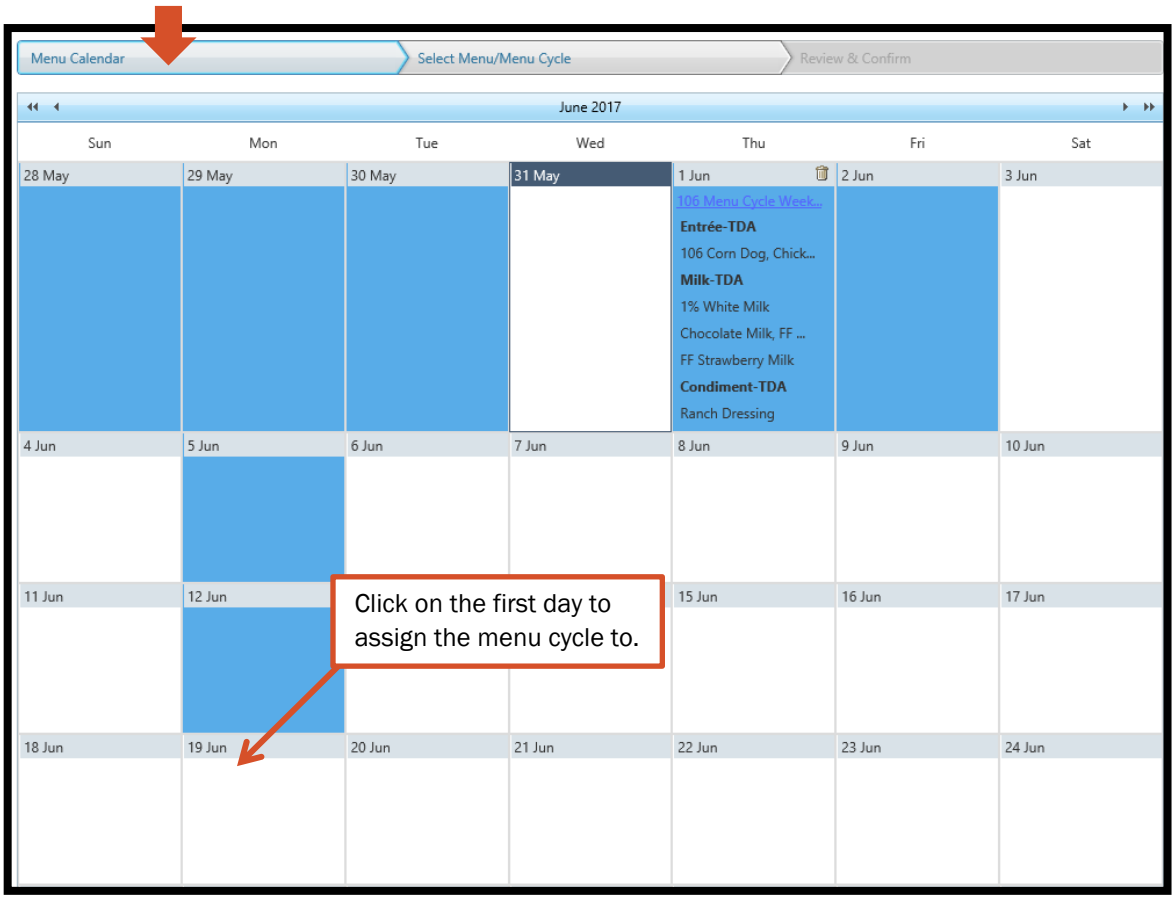


Note: The system highlights any dates configured as "Holidays" in blue.



Note: Users cannot assign menu cycles to weeks that have already passed.

8. **On the calendar, in the "Menu Calendar" tab, click on the first day of the first week to assign the menu cycle to.**



Notice that the system takes users to the second tab, labeled "Select Menu/Menu Cycle."

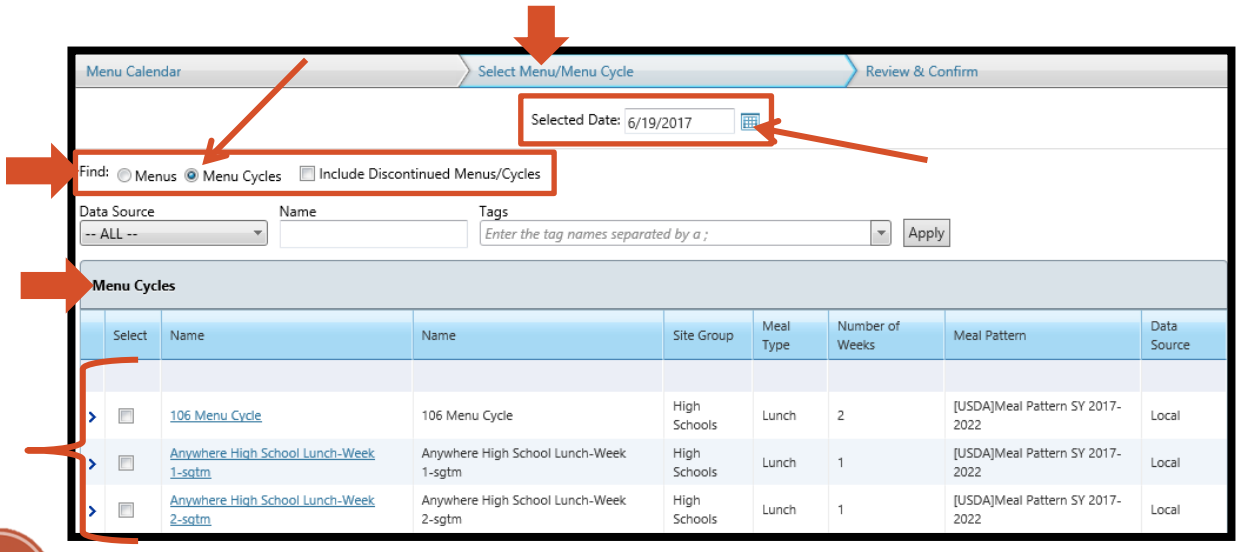
9. **Confirm that the "Selected Date" matches the date selected on the calendar.**

Note: To select a different date, click on the calendar icon.

10. **Select "Menus" or "Menu Cycles" from the "Find" section.**

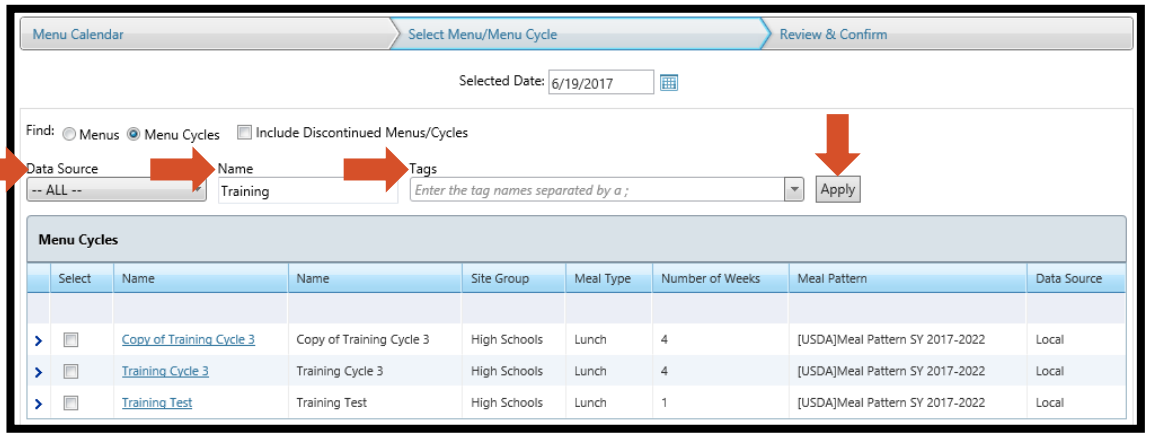
Notice that when a user selects "Menus," in the "Find" section, the system generates a "Menus" section containing a list of all created single menus.

Notice that when a user selects "Menus Cycles" in the "Find" section, the system generates a list of all available menu cycles.

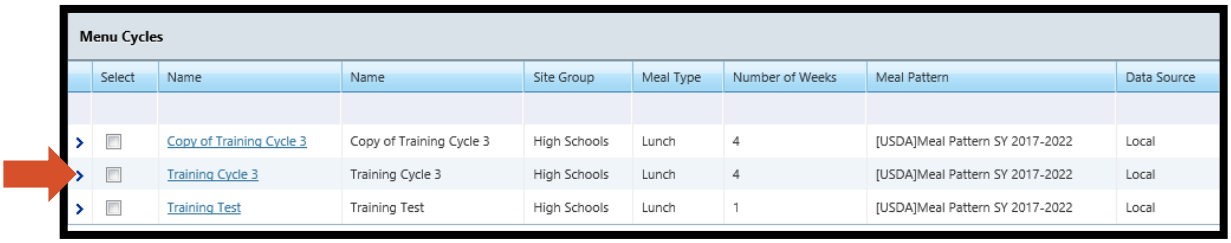


11. **Optional: Filter the search for menu cycles to assign to the calendar.**

    a. **Select a "Data Source" and/or enter a "Name," or "Tags."**
    b. **Click on the "Apply" button.**

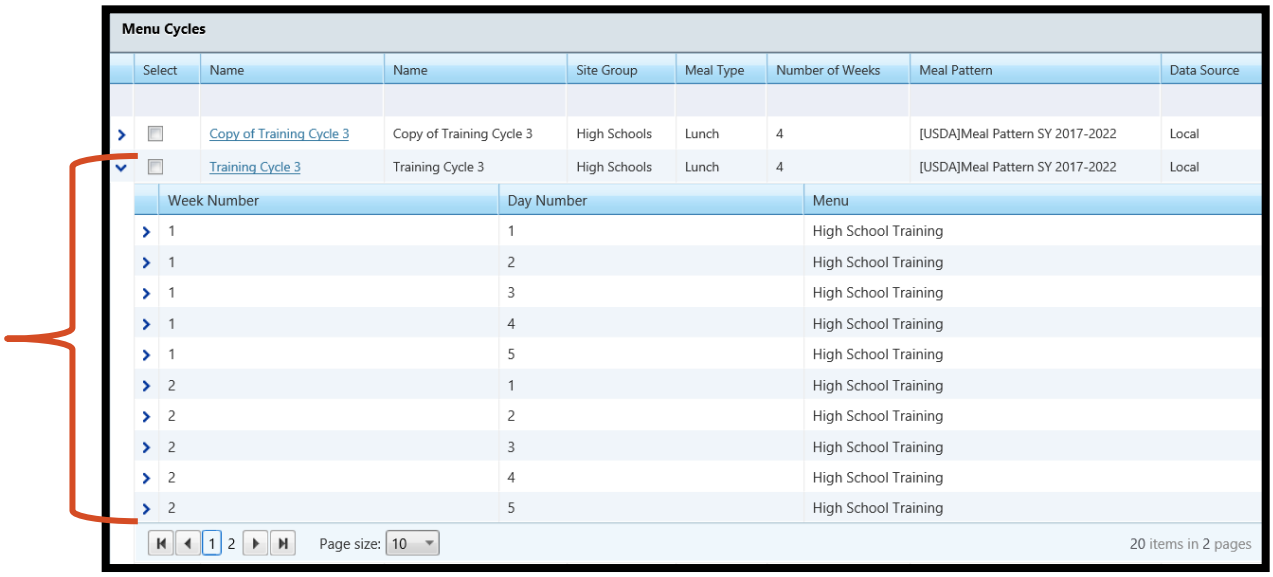


Note: Notice the arrow to the left of each menu cycle hyperlink (in the list). Click on arrows next to each menu cycle to expand a list of the menus within the menu cycle. Click on the arrow to the left of each menu to view details for each menu.



Menu Cycles

Select	Name	Name	Site Group	Meal Type	Number of Weeks	Meal Pattern	Data Source
	Copy of Training Cycle 3	Copy of Training Cycle 3	High Schools	Lunch	4	[USDA]Meal Pattern SY 2017-2022	Local
	Training Cycle 3	Training Cycle 3	High Schools	Lunch	4	[USDA]Meal Pattern SY 2017-2022	Local
	Training Test	Training Test	High Schools	Lunch	1	[USDA]Meal Pattern SY 2017-2022	Local

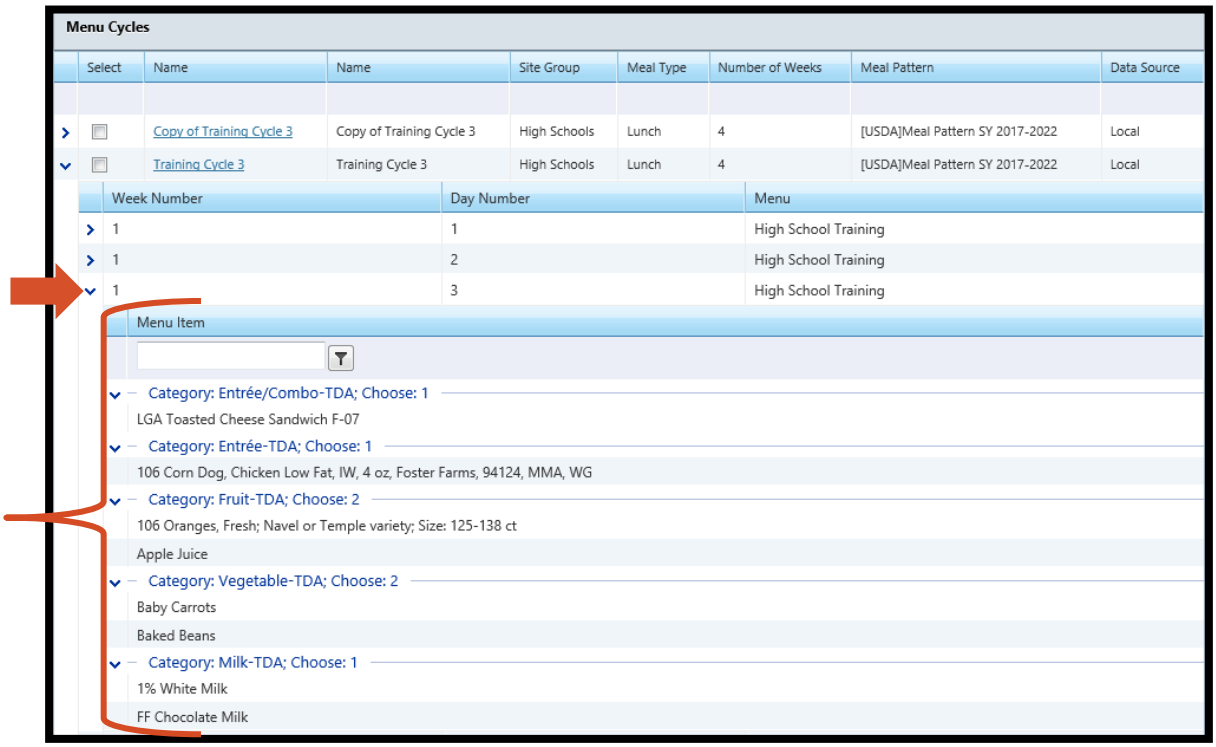


Menu Cycles

Select	Name	Name	Site Group	Meal Type	Number of Weeks	Meal Pattern	Data Source
	Copy of Training Cycle 3	Copy of Training Cycle 3	High Schools	Lunch	4	[USDA]Meal Pattern SY 2017-2022	Local
	Training Cycle 3	Training Cycle 3	High Schools	Lunch	4	[USDA]Meal Pattern SY 2017-2022	Local

Week Number	Day Number	Menu
1	1	High School Training
1	2	High School Training
1	3	High School Training
1	4	High School Training
1	5	High School Training
2	1	High School Training
2	2	High School Training
2	3	High School Training
2	4	High School Training
2	5	High School Training

1 2 Page size: 10 20 items in 2 pages



Menu Cycles

Select	Name	Name	Site Group	Meal Type	Number of Weeks	Meal Pattern	Data Source
	Copy of Training Cycle 3	Copy of Training Cycle 3	High Schools	Lunch	4	[USDA]Meal Pattern SY 2017-2022	Local
	Training Cycle 3	Training Cycle 3	High Schools	Lunch	4	[USDA]Meal Pattern SY 2017-2022	Local

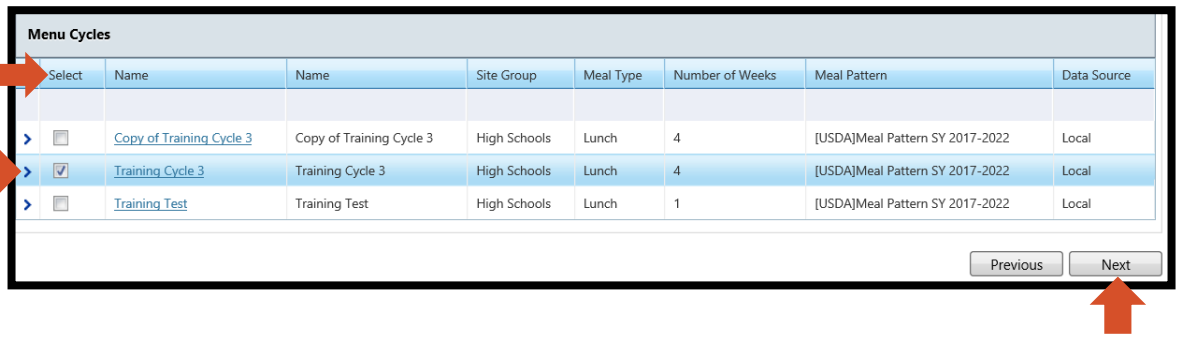
Week Number	Day Number	Menu
1	1	High School Training
1	2	High School Training
1	3	High School Training

Menu Item

Category: Entrée/Combo-TDA; Choose: 1
LGA Toasted Cheese Sandwich F-07
Category: Entrée-TDA; Choose: 1
106 Corn Dog, Chicken Low Fat, IW, 4 oz, Foster Farms, 94124, MMA, WG
Category: Fruit-TDA; Choose: 2
106 Oranges, Fresh; Navel or Temple variety; Size: 125-138 ct
Apple Juice
Category: Vegetable-TDA; Choose: 2
Baby Carrots
Baked Beans
Category: Milk-TDA; Choose: 1
1% White Milk
FF Chocolate Milk

12. Click on the box in the "Select" column for the menu cycle you choose to add to the calendar.

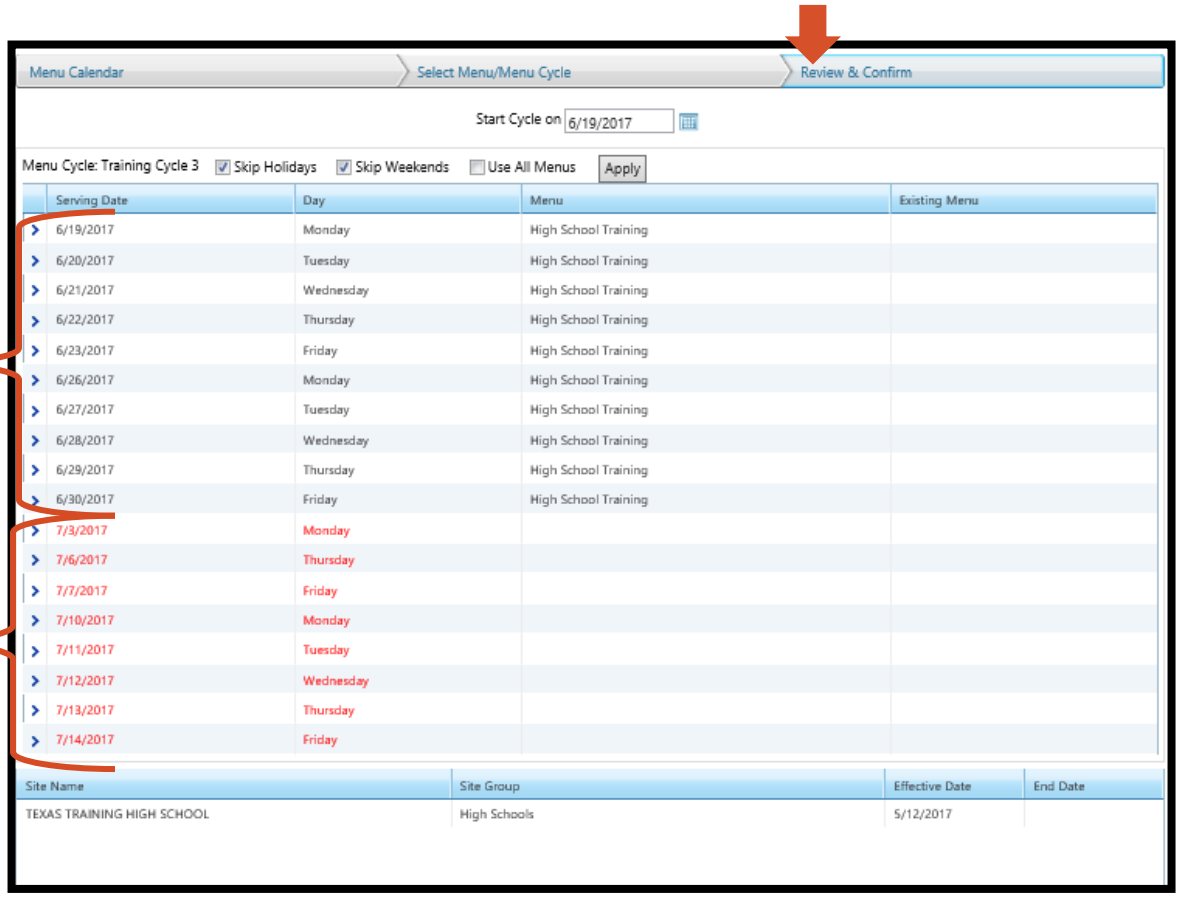
13. Click on the "Next" button.



Notice that the system takes users to the third, "Review & Confirm" tab.

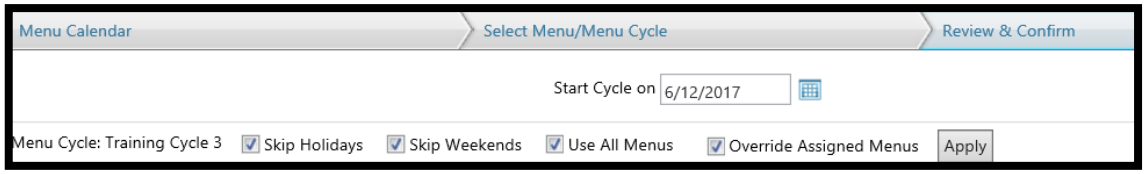
Notice that the system generates a list of dates and lists the menu assigned to each date.

Notice that the system highlights missing menus from the menu cycle in red.



Notice that users may choose how the system applies the menu cycle to the calendar. Users should make the following selections, as applicable.

- **Skip Holidays:** Select the "Skip Holidays" box so that the system does not apply menus to days configured as holidays on the calendar.
- **Skip Weekends:** Select the "Skip Weekends" box so that the system does not assign menus to weekends on the calendar.
- **Use All Menus:** Select the "Use All Menus" box so that the system uses each menu of the menu cycle, rather than skipping over menus that fall on skipped days, such as weekends and holidays.
- **Override Assigned Menus:** Select the "Override Assigned Menus" box so that the system replaces previous menu cycles with any newly added menu cycles on the calendar.

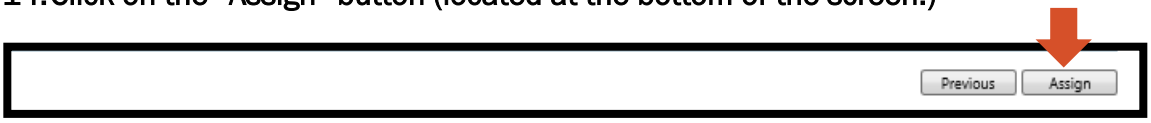


Example: The calendar pictured on the right reflects the following selections made by the user.

Selected
- Skip Holidays

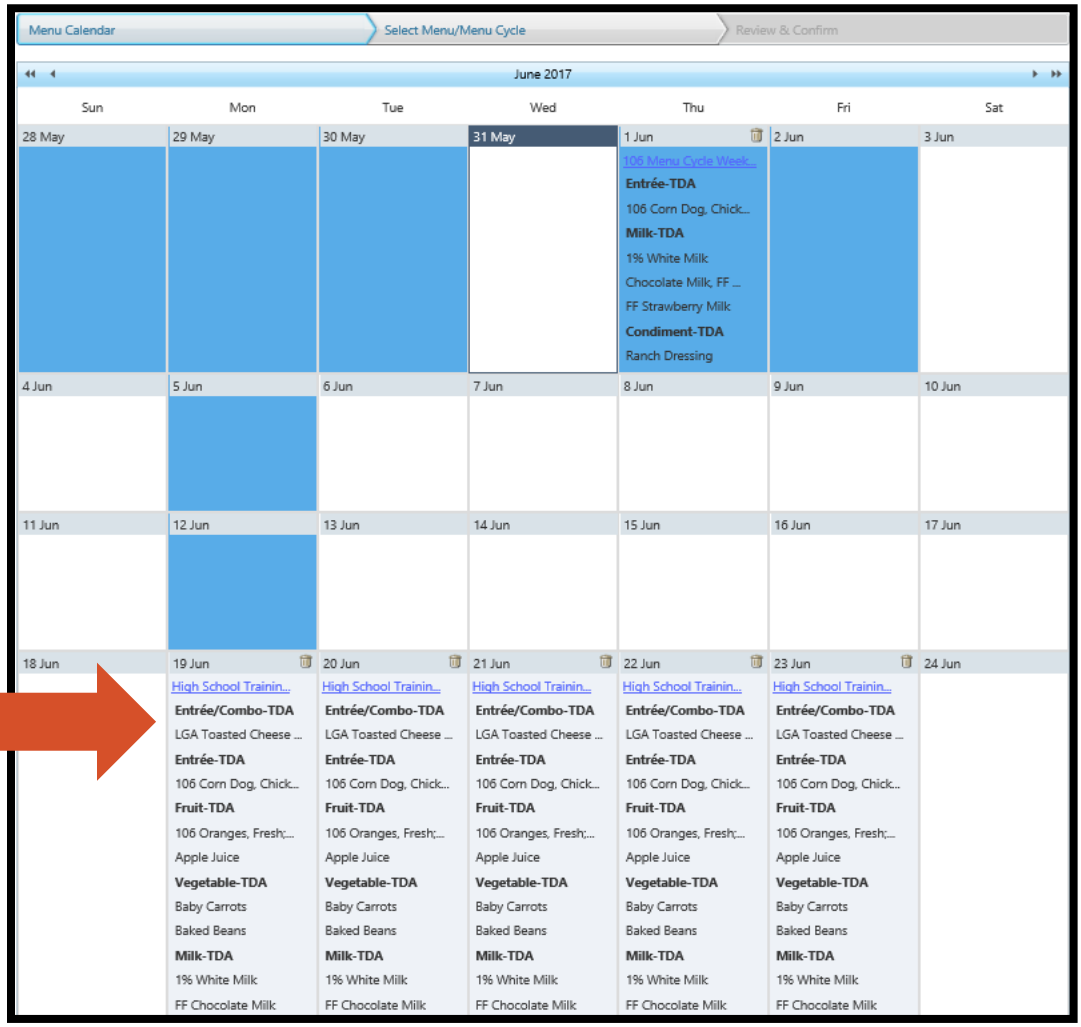
Not Selected
- Skip Weekends
- Use All Menus
- Override Assigned Menus

14. Click on the "Assign" button (located at the bottom of the screen.)



Notice that the system takes users back to the first tab, titled "Menu Calendar."

Notice that the system has populated the menu cycle to the "Menu Calendar."



Note: Once users assign menus or menu cycles to the calendar, site staff can see the menus or menu cycles in production.

Note: MENU Module allows users to remove or change single menus from a menu cycle after users assign the menu cycle to the production calendar. Users can also change menus at a single site (even after assigning a menu cycle to all sites in a site group.)

TEXAS DEPARTMENT OF AGRICULTURE
COMMISSIONER SID MILLER

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