
CYBERSOFT

Primeros *edges*

Production

User Manual



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Technology Innovation Solutions

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PrimeroEdge Food Service Solutions
PrimeroEdge Production User Manual

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Chapter 1: Getting Started

In this chapter you will learn:

- ✓ Basics about PrimeroEdge Production.
- ✓ How to login and access the Production module
- ✓ Access the PrimeroEdge Dashboard.
- ✓ Navigate to the Production module.
- ✓ How to use this manual.

Introduction

Cybersoft Technologies created the innovative PrimeroEdge Cafeteria Solutions family of software products and services to solve the wants and needs expressed by school food services experts. PrimeroEdge Cafeteria solutions help you gain greater control of your operations by reducing expenses through productivity enhancements, ease of training and increased accuracy.

At the core of PrimeroEdge Cafeteria Solutions is a flexible structure, designed to integrate into the current school environment by utilizing open standards including XML and Schools Interoperability Framework (SIF). This platform enables productivity boosts now, as well as positions schools to take advantage of future technology enhancements.

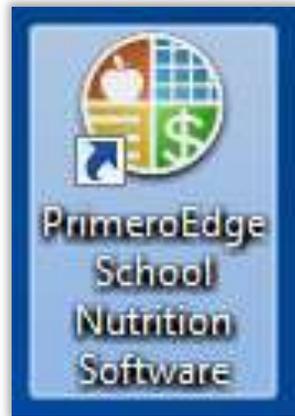
PrimeroEdge Production is an integral part of the PrimeroEdge Cafeteria Solutions family. It interfaces with the PrimeroEdge Menu Planning and Inventory modules to provide a total solution for meeting School Meals Initiative requirements from the procurement stage to the final stage of inventory control.

Key Features

- Includes more than 15,000 food items for food and recipe management.
- Recipes from the USDA as well as local recipes can be used.
- Menu items can include raw food, prepared foods, and recipes.
- Individual menus are built by day, school type and meal service.
- Menus are analyzed against nutrient standards using simple or weighted analysis methods.
- Combined breakfast and lunch nutrient analyses can be conducted.
- Daily menus are used to create cycle menus.
- School calendars are populated with single menus, cycle menus, or individual menu items.

Basics of Working with PrimeroEdge

Open PrimeroEdge



On your desktop:

- Find the PrimeroEdge shortcut icon.
- Double-click the icon.

The login page appears.

Log In To PrimeroEdge

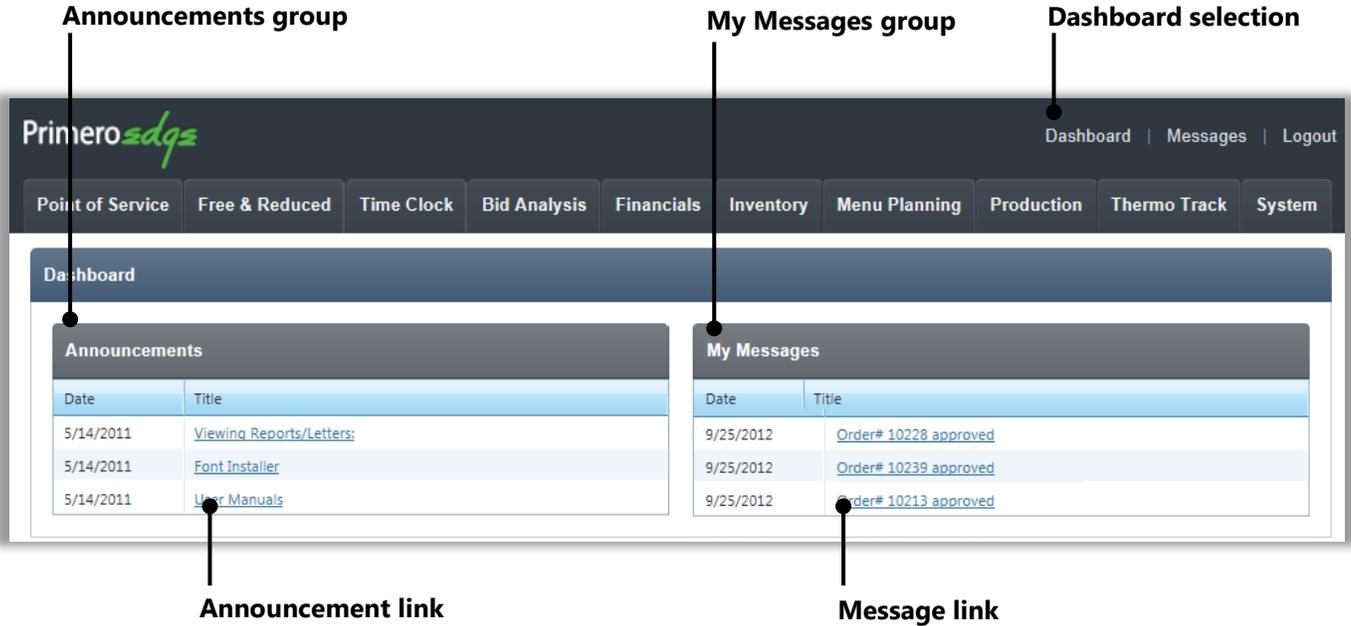
A screenshot of the PrimeroEdge login page. The page has a dark blue header with the "PrimeroEdge" logo in white and green. Below the header, there are two input fields: "Username" and "Password". Below the "Password" field, there is a "Login" button. The page has a light blue background.

On the Primero Login page:

- In **Username**, enter your Username.
- In **Password**, enter the password associated with your username.
- Click  .

Tour the PrimeroEdge Dashboard

The *Dashboard* page appears after a successful login. This page is accessed at any time by clicking **Dashboard** on the top navigation menu.

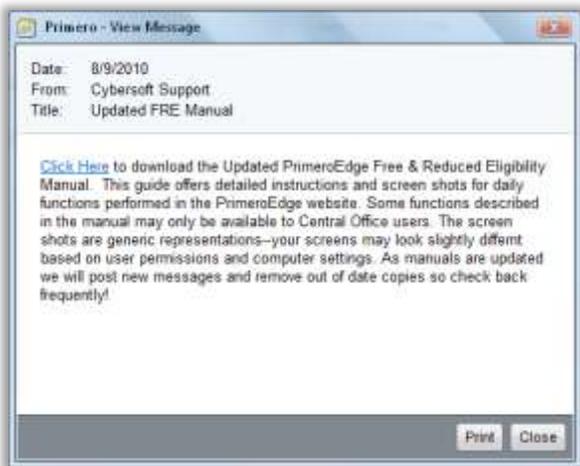


Dashboard Groups

The Dashboard offers two groups:

- **Announcements** – general messages for all users of Primero
- **My Messages** – specific messages to you about items in Primero

Clicking a link in the **Title** column in either group displays the **View Message** popup.



Navigate to the Production Module

When you login to PrimeroEdge you see one or more food services modules from Cybersoft Technologies that your district has chosen to use and that your role has permission to access. You will see one tab for each module.



To access the **[Production]** module

- Click the **Production** tab.

The **Production** home page is displayed.

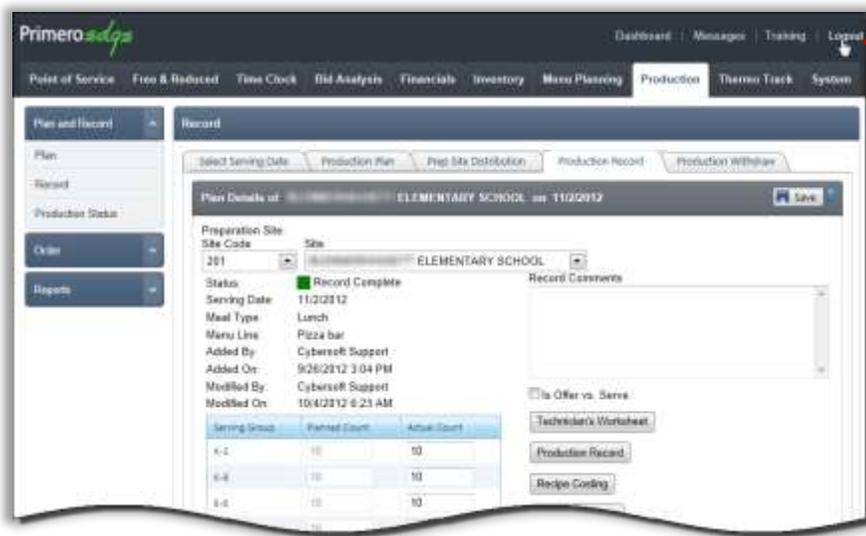
The **Production** module offers three (3) menus with multiple functions on each menu in the menu bar on the left.

★ Note

Menus and menu functions to which you have access to are those appropriate for your role with PrimeroEdge. Therefore, when you log on to PrimeroEdge, you may see a subset of the menus shown above, or you may not see all of the functions that are reviewed in this manual.

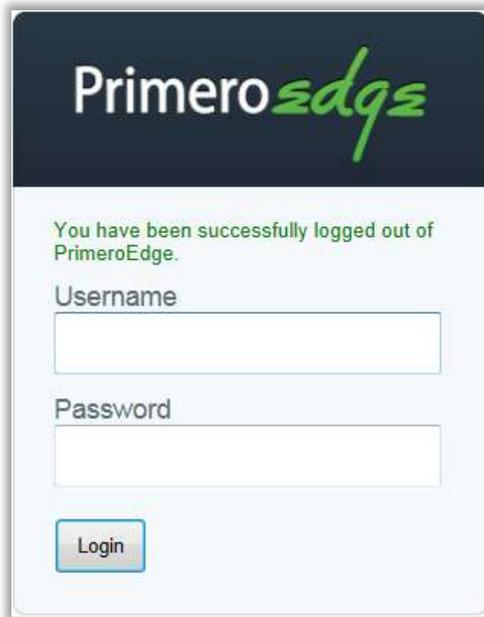
Log Out of PrimeroEdge

Logging out of PrimeroEdge can be performed from any page.



To log out of PrimeroEdge

Click [Logout](#).



The PrimeroEdge Login page is displayed.

A log out success message appears.

How to Use This Manual

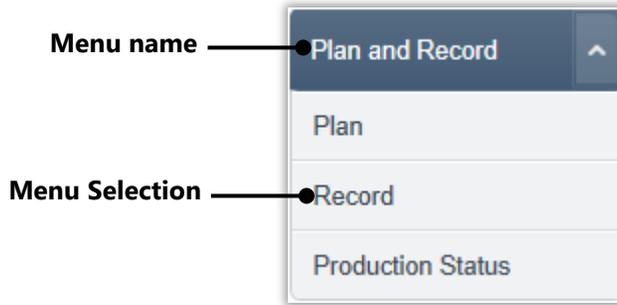
This manual uses style conventions to help you relate what you see in this book to what you see on the PrimeroEdge web site.

Text conventions

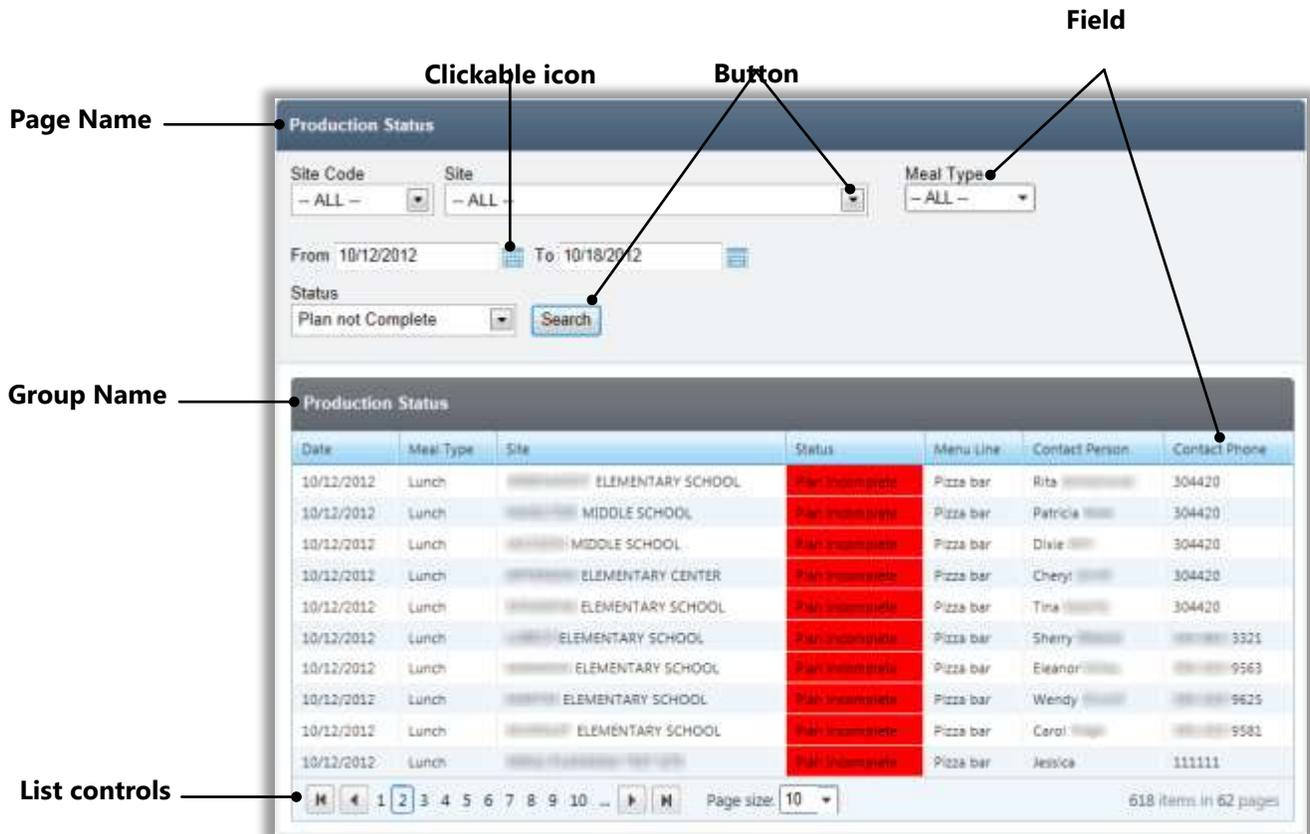
Item	Convention	Example
Button	Graphic as seen on screen	Click  .
Clickable icon	Icon name followed by graphic	Click Delete ().
Clickable link	<i>Blue, bold, italics, underlined</i>	Click the <i>BatchNumber</i> in the <u>Batch #</u> column.
Field name	Bold, underlined , capitalization as seen on page	In <u>Meal Type</u> , select a type.
Group name	Bold , capitalization as seen on screen	In the Production Status group...
Key name	Small caps	TAB key ENTER key
Menu name	Bold , title caps	The Plan and Record menu is...
Menu selection	Bold , capitalization as seen on screen	Select Production Status on the...
Message	<i>"Italics, enclosed in quotes, capitalization as seen on page"</i>	<i>"This is a new unsaved order."</i>
Module Name	Bold , <i>title caps</i> , enclosed with square brackets	[Production]
Page name	<i>Italics</i> , title caps	On the <i>Production Stats</i> page...
Selection sequence³	Bold , capitalization as seen on the page, separated with ">"	[Production] > Plan and Record > Plan
Window name	<i>Italics</i> , title caps	In the <i>Report Viewer</i> window, click...

Menu and Page Conventions

Menus



Pages



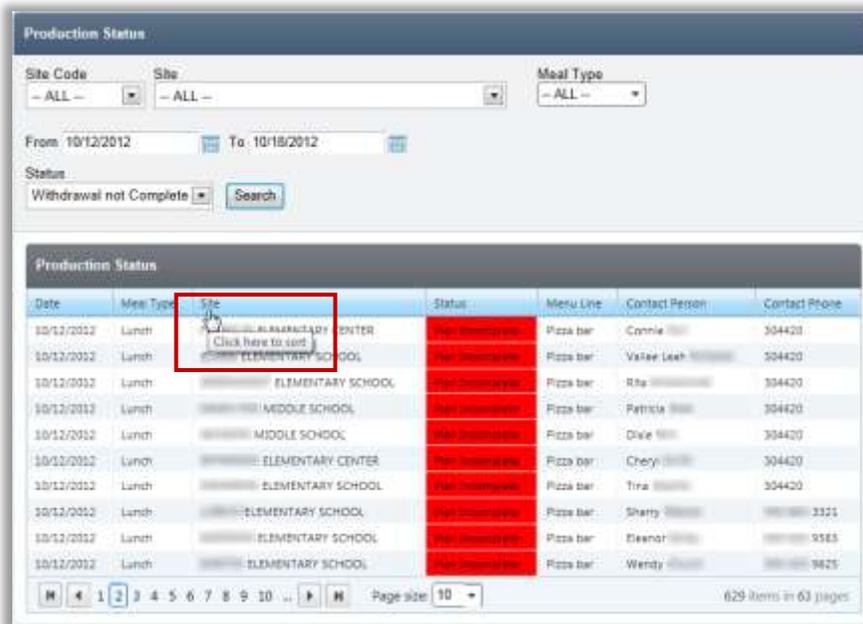
Icon convention

Icon	Name	What it means
	NOTE	Additional information on the use or function of the command or topic.
	CAUTION!	Information that is critical to the use of the function.
	TIP	Information that may help you use the function more effectively.

Special Functions

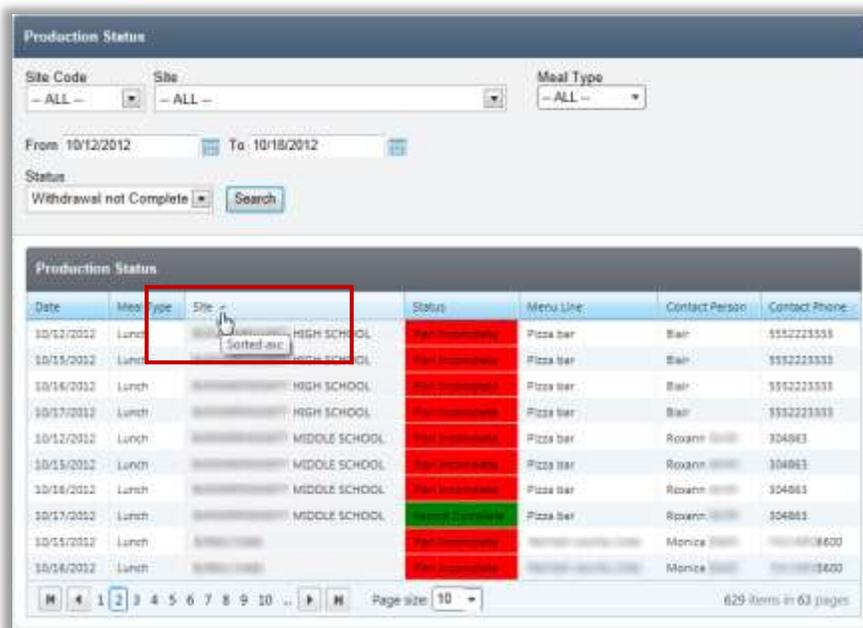
When you see...	You can...
	Place the cursor in a date section, such as Month, and click the ↑ key to increase the number or click the ↓ key to decrease the number.

Sorting Column Data



Column data can be sorted if the pointing finger icon appears when the mouse cursor hovers over a column header.

- Click once on the header to sort the column data in ascending order.
- Click the header again to sort the column data in descending order.

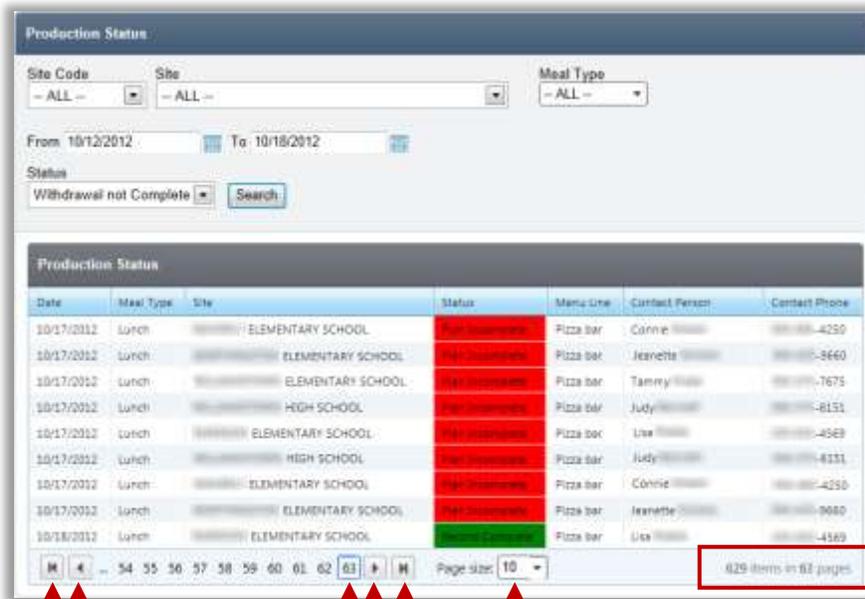


A small triangle next to the header indicates the sort order:

- ▲ ascending
- ▼ descending

Hovering over the triangle next to the column name displays a prompt that tells the sort order.

Using List Display Controls



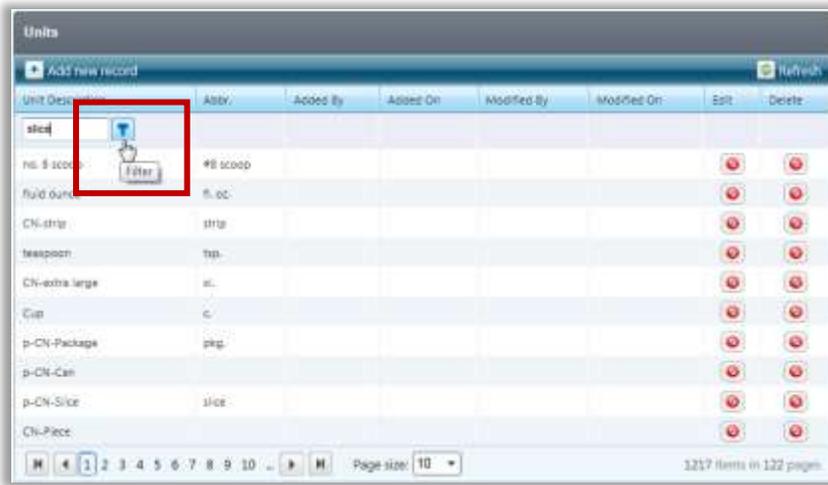
Several screens display listings on multiple pages. Display controls are provided below the listings to move between the pages.

The total number of items (listings) and the total number of pages of listings is shown.

To use the list display controls

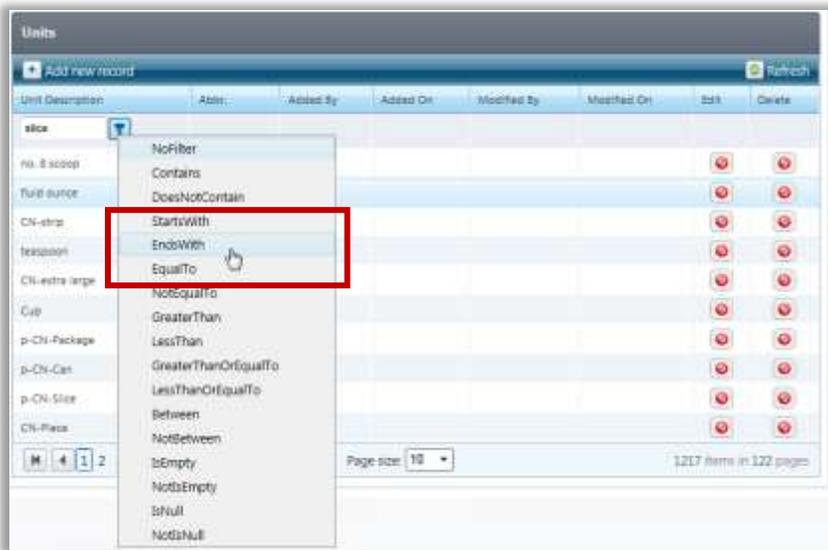
- To change the number of listings displayed on a page, select a number from the Page size: list.
- To display the last screen of listings, click .
- To display the next screen of listings, click .
- To display a specific page of listings, click number button such as .
- To display the previous screen of listings, click .
- To display the first screen of listings, click .

Working with Filters



In item lists, filters are provided to help you find data more quickly.

- In the filter field, enter a text string.
- Click **Filter** ().



In the filter list:

- Select the filter condition.



The filtered data is shown in the list.

Chapter 2:

Plan and Record

In this chapter you will learn how to:

- ✓ Add meal counts to complete a production plan.
- ✓ Add a menu item to a Complete production plan.
- ✓ Print production plan recipes.
- ✓ Record servings produced, carried over, returned to inventory or withdrawn from inventory as waste.
- ✓ Print a production record.
- ✓ Display a list of production records for a selected date range, site, meal type and status.
- ✓ Create a withdrawal from a completed production record.
- ✓ View and print a withdrawal.
- ✓ Adjust a withdrawal.
- ✓ Cancel a withdrawal.

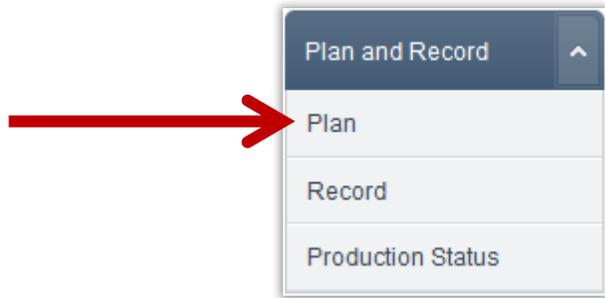
Plan and Record at a Glance

Menu Function	Description
Plan	Add plan counts, print plan recipes and add, modify, remove individual menu items to a plan.
Record	Add servings produced, carried over, and returned to- and/or removed from inventory.
Production Status	Display lists of production records by site, meal type and status for a date range.

Note

Menus and functions to which you have access are those appropriate for your role with PrimeroEdge. When you access the **Plan and Record** menu, you may see a subset of the functions listed above, or some of the functions described in this section may not be available.

Plan

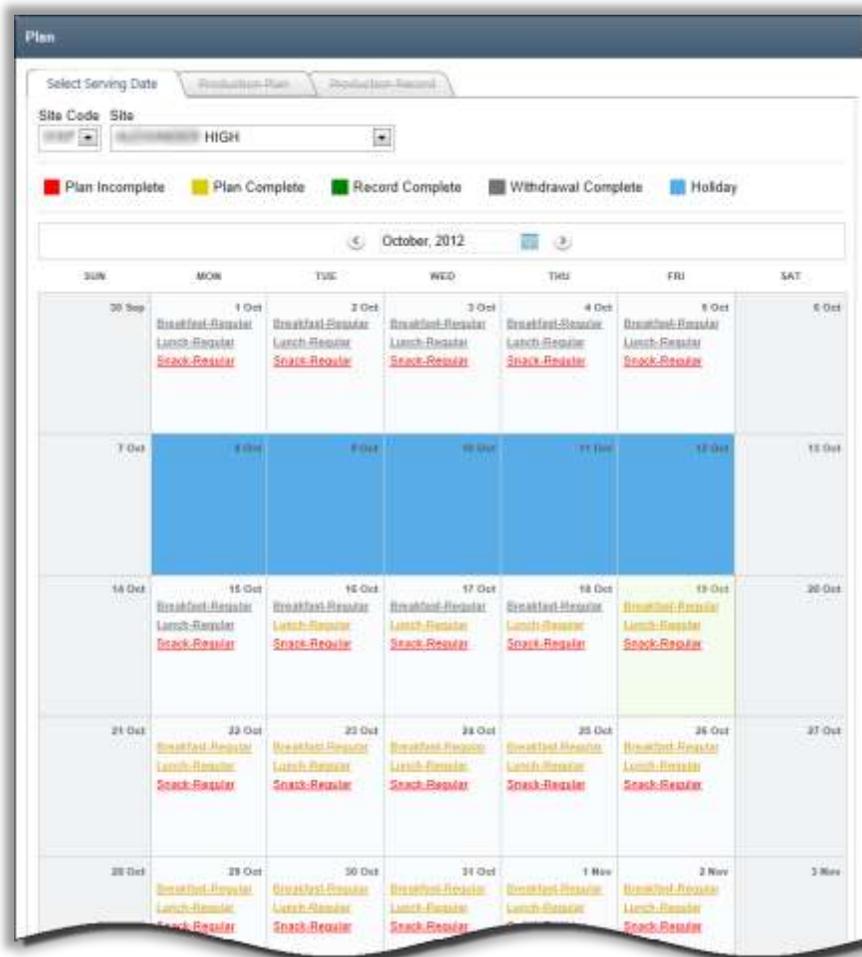


Completing a Production Plan is the first step in the Production management process. A Production Plan is automatically created for each menu assigned to a calendar date through the **[Menu Planning]** module. When the plan is created, it includes:

- 1) All menu items included on the assigned menu for each serving group, and
- 2) Projected meal counts.

Plan allows you to:

- Enter planned meal counts for each serving group for each menu item being served.
- Add menu items to a Production Plan for situations that require substitutions or the late addition of a menu item.
- Print recipes included in the Production Plan.



The *Plan* page includes three tabs:

- **Select Serving Date**—displays monthly calendars with links on each day to a Production Plan for each assigned menu.
- **Production Plan**—displays the Production Plan for an assigned menu; plan includes planned counts for each Serving Group, planned menu items and item counts.
- **Production Record**—displays actual serving counts.

On the **Select Serving Date** tab:

- **Site Code / Site** is set to your site or the first site in the list of available sites if you have access to multiple sites.
- A one-month calendar with the current month is displayed.

Calendar Legend

Each menu assigned to a calendar date is shown on the *Production* page on the **Select Serving Date** tab. Each menu entry is color coded to indicate the status of the plan/record in the production cycle.

The screenshot shows a calendar for November 2012 with various menu items listed for each day. The menu items are color-coded according to their status. A legend on the right side of the page explains the color coding:

- 1 Plan Incomplete**—a menu has been assigned but no planned meal counts have been entered. (Red square)
- 2 Plan Complete**—projected meal counts for each menu item have been entered on the plan for each serving group. (Yellow square)
- 3 Record Complete**— menu item counts served during a meal service are entered and saved. (Green square)
- 4 Withdrawal Complete**—menu items/ingredients have been withdrawn from inventory. (Gray square)
- Current Day**—the current day is shown in light green. (Light green square)
- Holiday**—holidays are shown in bright blue; no menus are typically assigned on these days but can be if needed. (Bright blue square)

Weekend days are shown in light gray; no menus are typically assigned on these days but can be if needed. (Light gray square)



You may see two additional tabs:

- **Prep Site Distribution** – available when your district includes sites that produce and/or distribute meals for other sites.
- **Production Withdrawal** – available when your district uses the **[Inventory]** module to manage items for food production.

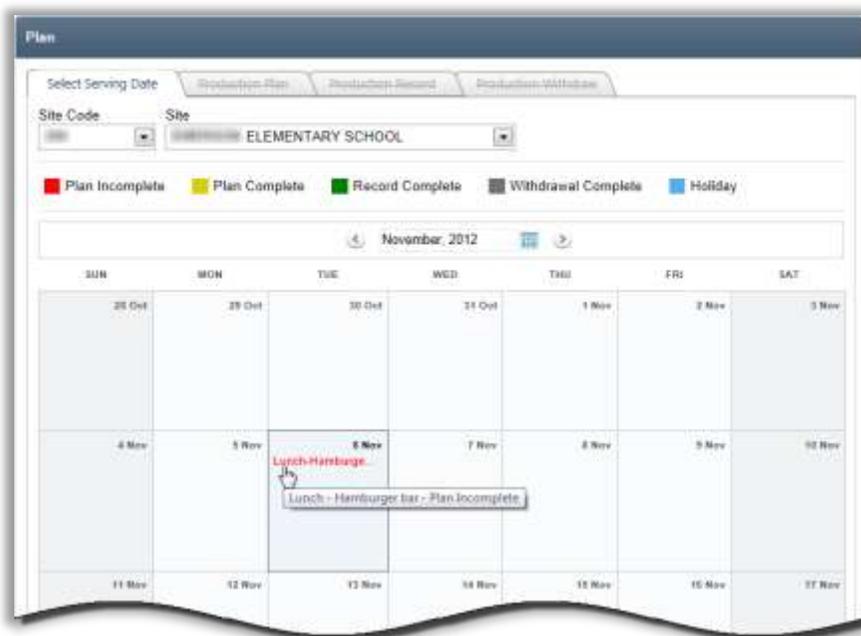


Note

A tab that has a line drawn through the tab name indicates that:

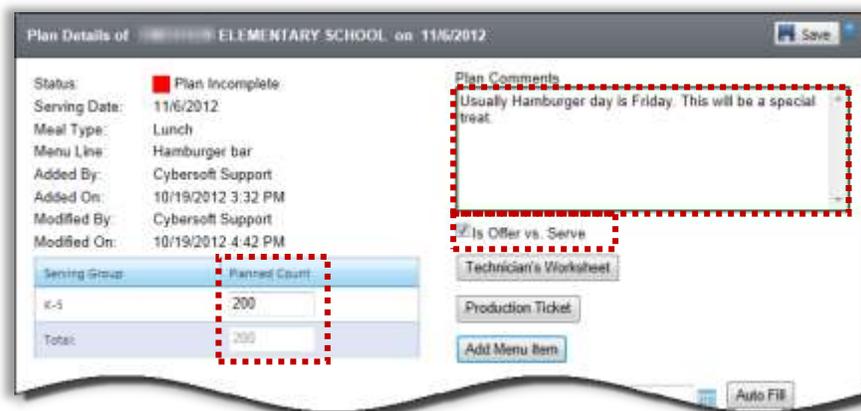
- The tab details cannot be accessed by clicking on the tab, *or*
- Required information has not been completed for the tab to be accessible, such as when the **Production Withdraw** tab is not accessible until the **Production Plan** is complete.

Completing a Production Plan



On the **Select Serving Date** tab:

- Click a production plan link with a status of **Plan Incomplete** (■).



On the *Production Plan* tab:

- In **Plan Comments**, enter comments about the plan as needed.
- Select **Is Offer vs Serve** if the meal service allows the student to decline items in a school breakfast or lunch.
- In **Planned Count**, enter the number of planned meal counts for each Serving Group.

Note

Enter "0" (zero) for a group's **Meal Count** if you do not plan to produce food for the group.

Menu Item	Meal/Contribution	Food Required	Carry Overs	K-S	Total Planned	Counts
Category: Meals						
Hamburger (LR100326)				50 1 CN-Piece	50	
Hamburger w/ Bun (LR100402)	2 WG 1 1/2 Meat/MA			200 1 each	200	
Subtotal:				250	250	
Category: Lg Milk						
PC-Milk, 5 (LR100675)	2 MILK-F			200 1 16oz gals milk	200	
Subtotal:				200	200	
Category: Salads						
Hamburger Vegetables (LR300075)	1/2 Veg-DG 1 Veg-RO			200 1 each	200	
Subtotal:				200	200	
Category: Fruit						
Apple, Golden Delicious (LR300076)	1 Fruit			200 1 CH-giams 1 serving	200	
Banana (LR300018)	2 Fruit			100 2 Cup	100	
Subtotal:				300	300	
Total:				950	950	

In the **Menu Items** group, enter the projected serving amounts for each menu item. Use one of the following methods:

- Use **Auto Fill Date**.
Enter a date that includes a plan with completed counts. When a menu item and serving group match is found between the two plans, the count from the completed plan is automatically entered on the new plan. Any non-matches are highlighted in red and left blank for you to complete.

- Enter individual serving group counts.

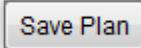
Enter counts for each menu item for each serving group using the **TAB** key to move between the serving group fields.

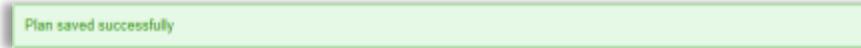


Note

Enter "0" (zero) for a serving group's projected serving amounts for items that you do not plan to serve.



At any time, you can click  to save the data that you have entered.



A save success message appears.

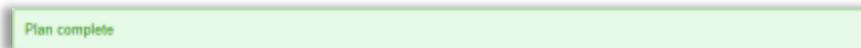


The Plan status remains **Plan Incomplete** ().



When all items on the plan have been updated as needed and you feel that the plan is complete:

- Click .

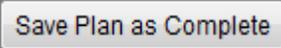
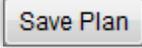


A green, success message appears.



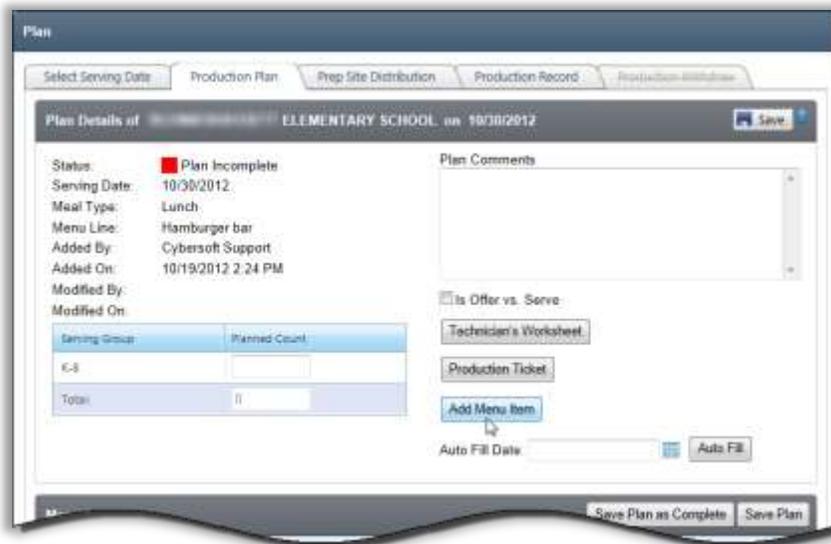
The Plan status changes to **Plan Complete** ().

 **Note**

The  button is no longer available. However, you can continue to update and save plan details by clicking .

Adding a Menu Item

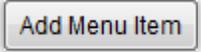
Menu items can be added to a Production Plan to include substitutions when needed.

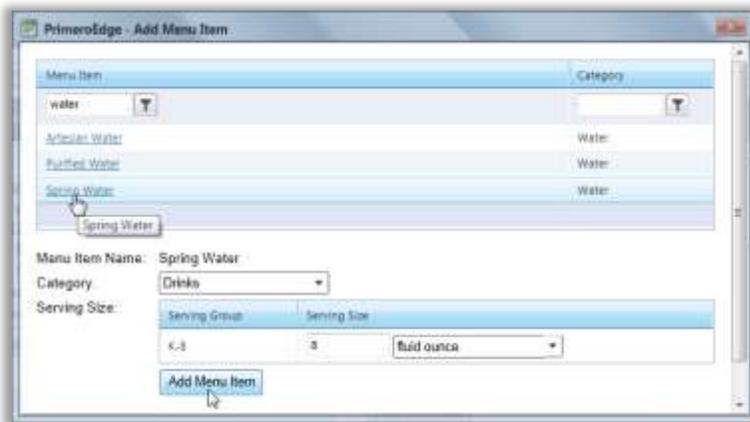


On the *Plan* page:

- Display a Production Plan on the **Production Plan** tab.

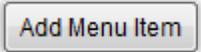
On the **Production Plan** tab:

- Click 



In the *Add Menu Item* popup:

- Use filters and/or list controls to display a set of menu items.
- Click a menu item listing.
- **Serving Size** is automatically populated based on your system configuration. However, you can change the serving size by selecting a different serving measurement from the drop-down list.

- Click 

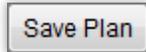
Note
See pages 15 and 16 for more information on using list controls and filters.



The new menu item is added to the corresponding category.

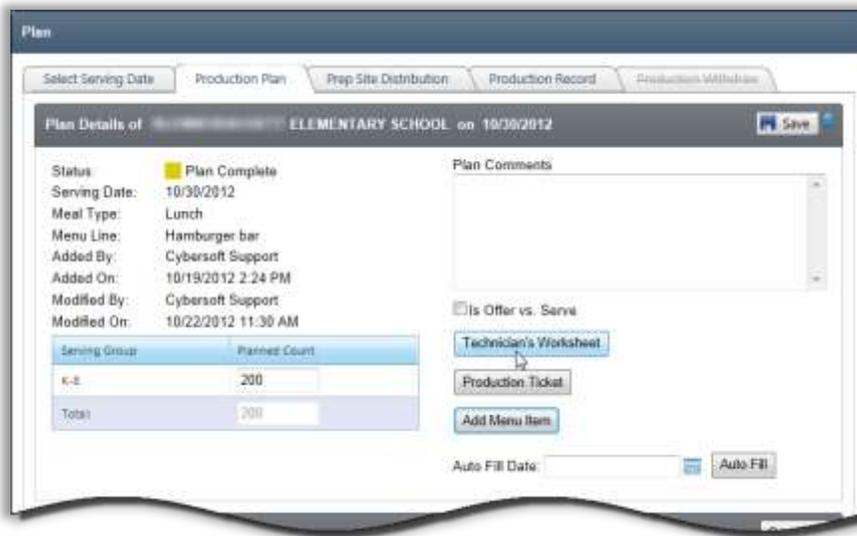
The new menu item can be removed by clicking **Delete** ().

The "original" menu items cannot be removed in the same manner because they are included on a menu.

- Click  to save the new menu item.

Printing a Technician's Worksheet

A printed Technician's Worksheet is used after a meal service to write down the amount prepared and the number of Leftovers for each menu item.

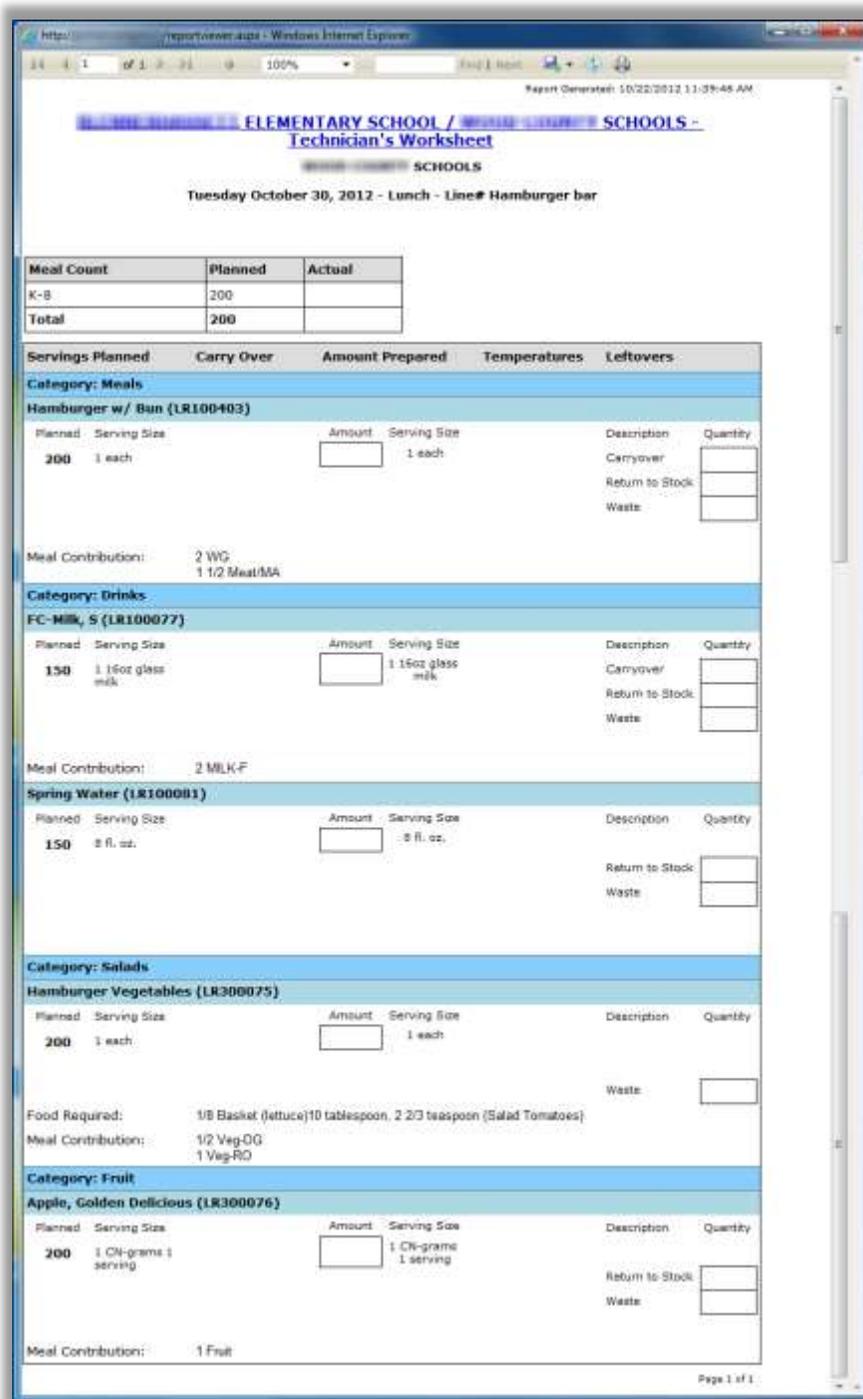


On the *Plan* page:

- Display a Production Plan on the **Production Plan** tab.

On the **Production Plan** tab:

- Click .



On the *Report Viewer* window toolbar:

- Click **Print** ().
- Click **Close** () to close the *Report Viewer* window.

This report may have multiple pages. Check the page count on the *Report Viewer* window toolbar.

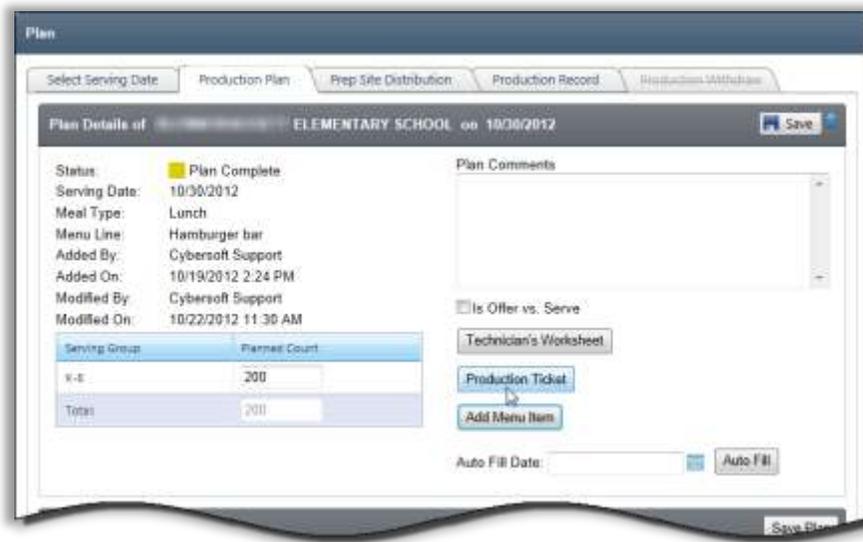
Each menu item is listed with:

- Planned number of servings
- Serving size
- Meal contributions (if included on the recipe's **Menu Item** tab in the **[Menu Planning]** module, and

To complete the worksheet:

- In **Meal Count**, record the number of servings that were actually distributed for each serving group.
- For each menu item, record
 - ★ Amount/number of servings prepared, and
 - ★ Quantities designated for type of leftover.

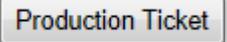
Printing Production Tickets

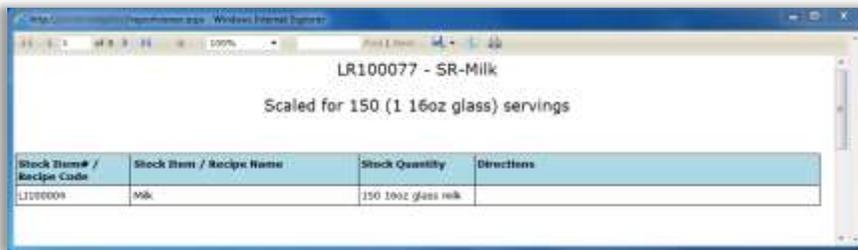


On the *Plan* page:

- Display a Production Plan on the **Production Plan** tab.

On the **Production Plan** tab:

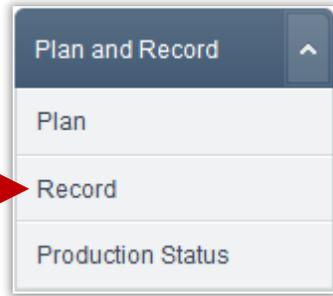
- Click 



One page is created for each menu item.



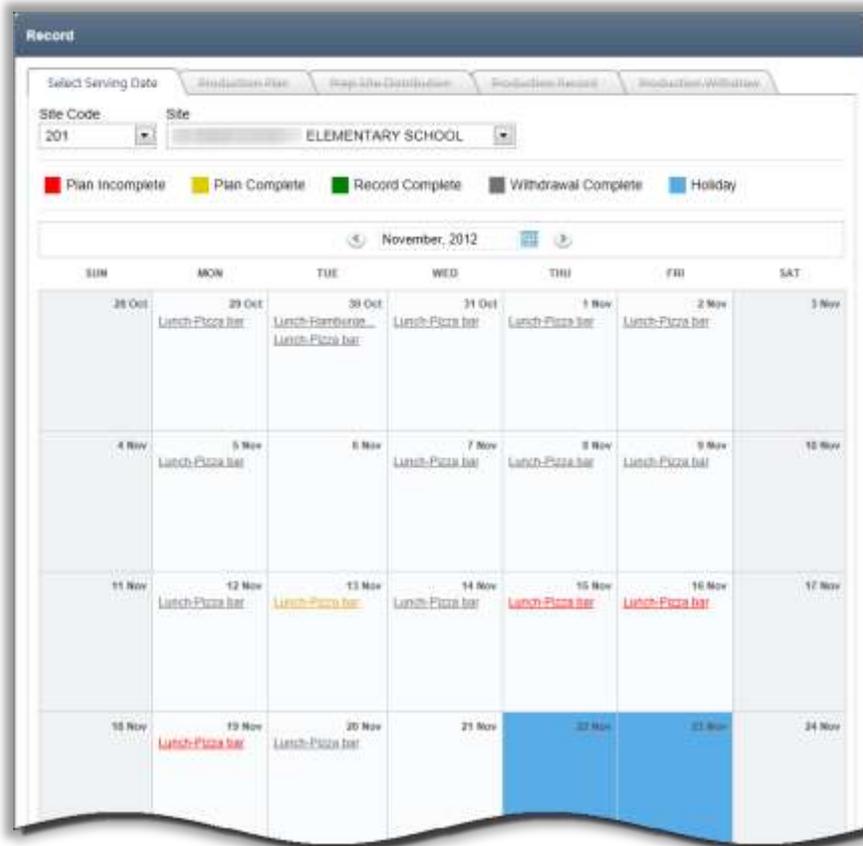
Record



Record allows you to save serving details after a meal service, such as the number of servings produced, carry overs to another date, returns to inventory, or discards (waste).

The Technician’s Worksheet can be printed before the meal service to manually record serving counts during the meal service.

The Production Plan is printed after serving counts have been entered and saved.



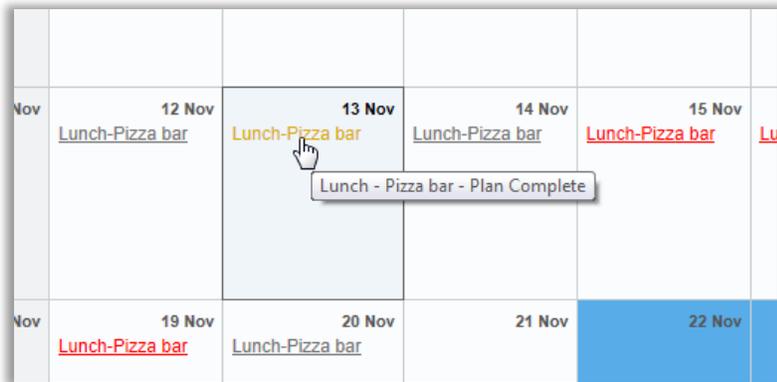
The *Plan* screen includes three tabs:

- **Select Serving Date** – displays calendars for each meal service offered in the selected month.
- **Production Plan** – displays planned counts for each RDA Group and each menu item.
- **Production Record** – displays actual serving counts.

Each date is assigned a status:

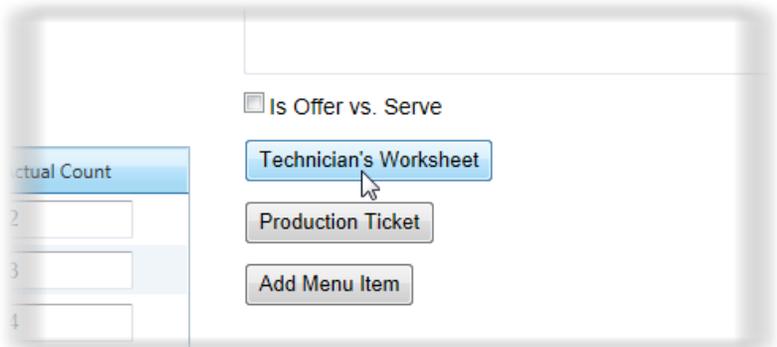
- **Plan Incomplete**—a menu has been assigned but no meal counts have been set up.
- **Plan Complete**—a menu is assigned and meal counts have been set up.
- **Record Complete**—a menu is assigned, meal counts set up and actual servings have been recorded.
- **Withdrawal Complete**—menu items/ingredients have been withdrawn from inventory.
- **Holiday**—typically, no menus are assigned to these days, but can be if needed.

Printing a Technician's Worksheet



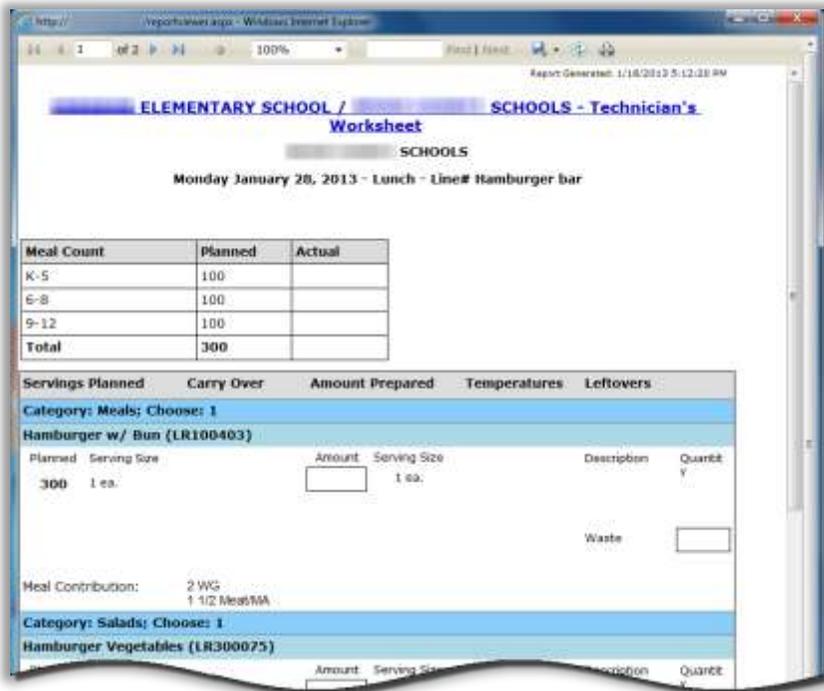
On the **Select Serving Date** tab of the *Record* page:

- Click a date with an assigned menu.

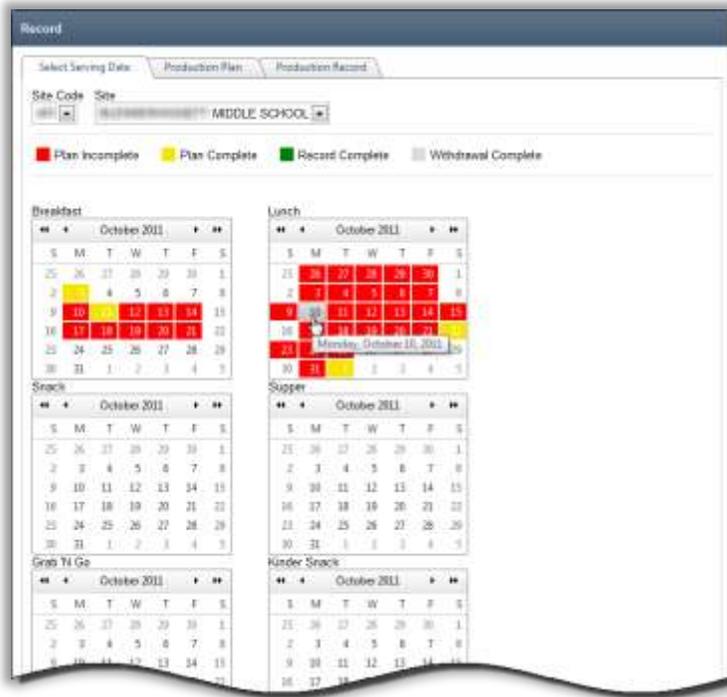


In the **Plan Details** group on the **Production Record** tab:

- Click [Technicians Worksheet](#)

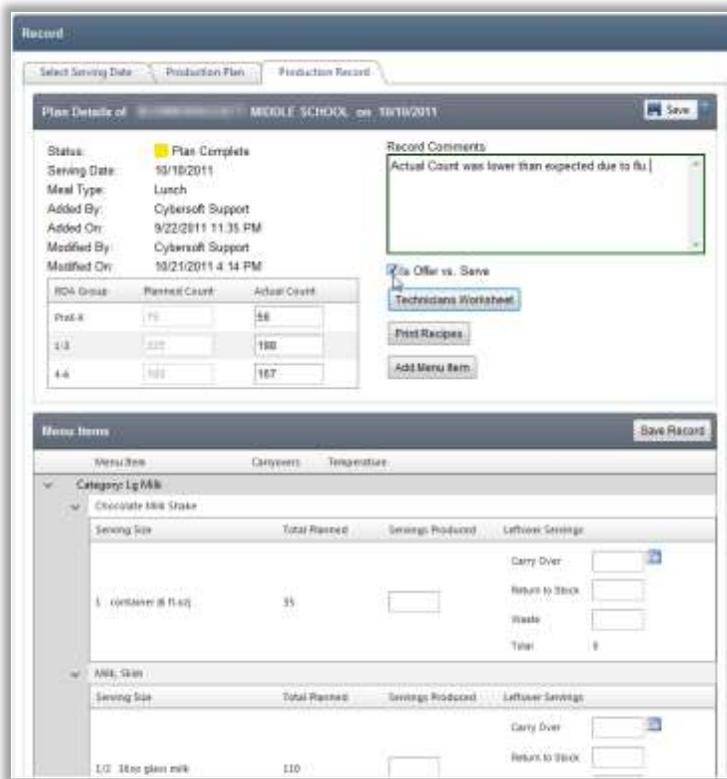


Completing a Production Record



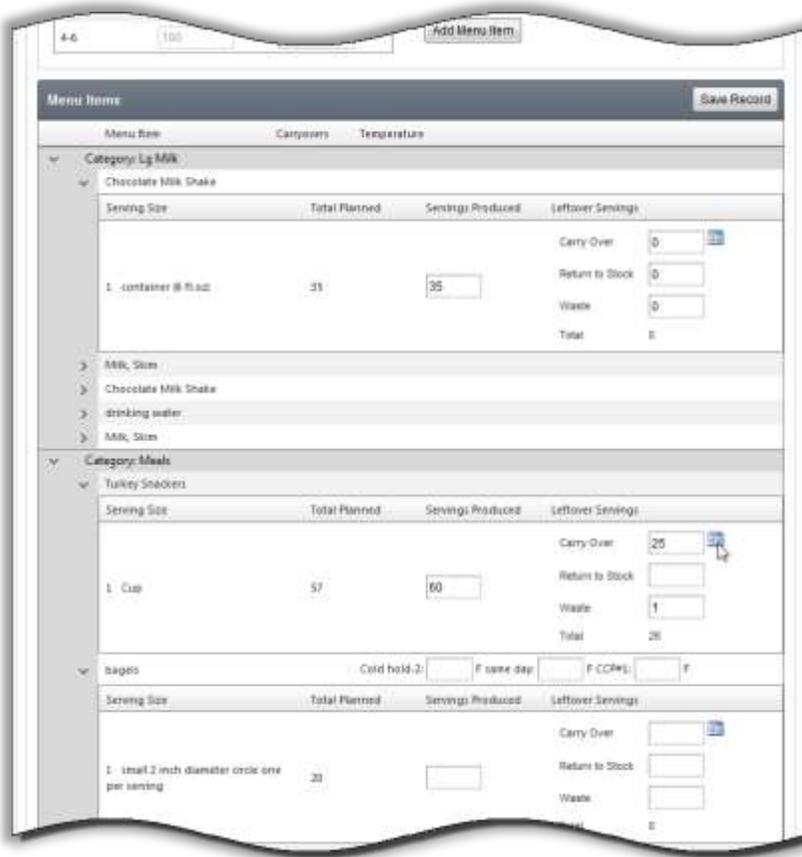
On the **Select Serving Date** tab of the *Record* screen:

- Click a date with a status of **Plan Complete** ().



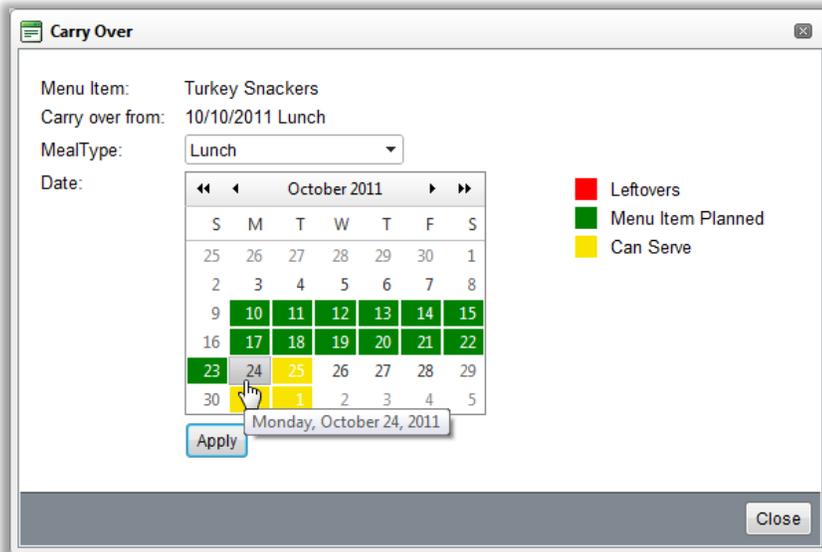
In the Plan Details group of the Production Record tab:

- In **Actual Count** in the **RDA Group** list, enter the number of meals served for each group.
- In **Record Comments**, enter comment text, if needed.
- In **Is Offer vs. Serve**, select if the meal service used the OVS (offer vs serve) system.



In the **Menu Items** group for each menu item:

- In **Servings Produced**, enter the total number of meal servings that were prepared.
- In **Carry Over**, enter the number of servings of the menu item to serve at another meal service.
- Click the Carry Over calendar icon to display the *Carry Over* dialog.



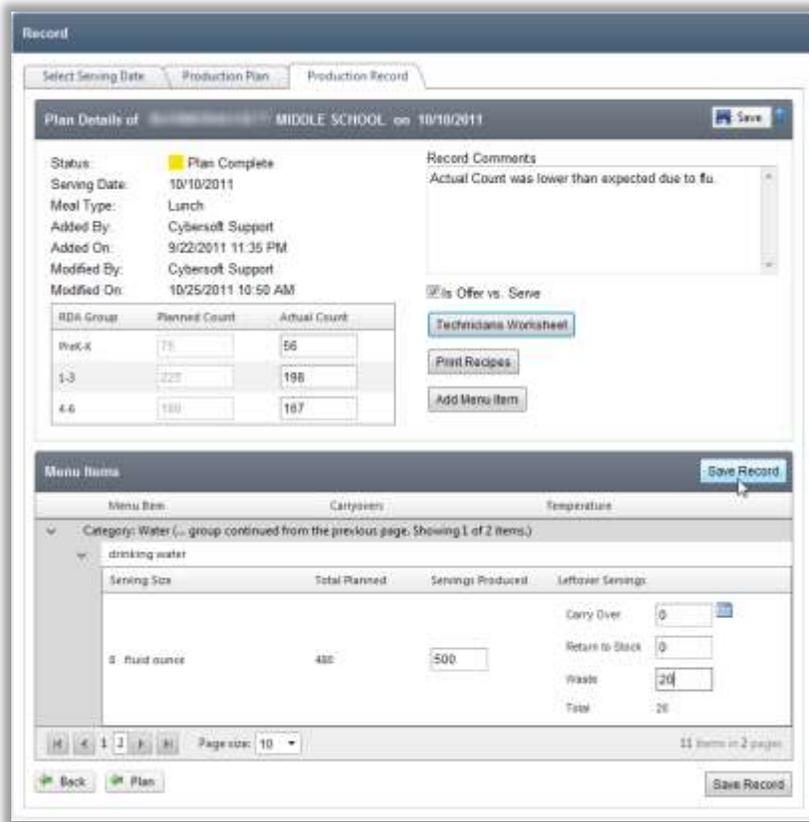
In the *Carry Over* dialog:

- In **Meal Type**, select a meal service, if needed,
- Click a date on which the carry over menu items will be served.

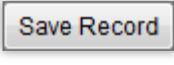
Menu Item	Capacity	Temperature	
Category: Lg Milk			
Chocolate Milk Shake			
Serving Size	Total Planned	Servings Produced	Leftover Servings
1 container 6 fl. oz.	35	35	Carry Over: 0 Return to Stock: 0 Waste: 0 Total: 0
Milk, Skim			
Chocolate Milk Shake			
drinking water			
Milk, Skim			
Category: Meals			
Turkey Snackers			
Serving Size	Total Planned	Servings Produced	Leftover Servings
1 Cup	57	60	Carry Over: 25 (10/24/2011 Lunch) Return to Stock: 0 Waste: 1 Total: 26
bagels Catal hold-2: <input type="checkbox"/> P same day: <input type="checkbox"/> P CCPNL: <input type="checkbox"/> P			
Serving Size	Total Planned	Servings Produced	Leftover Servings
1 small 2 inch diameter circle one per serving	20		Carry Over: <input type="text"/> Return to Stock: <input type="text"/> Waste: <input type="text"/>

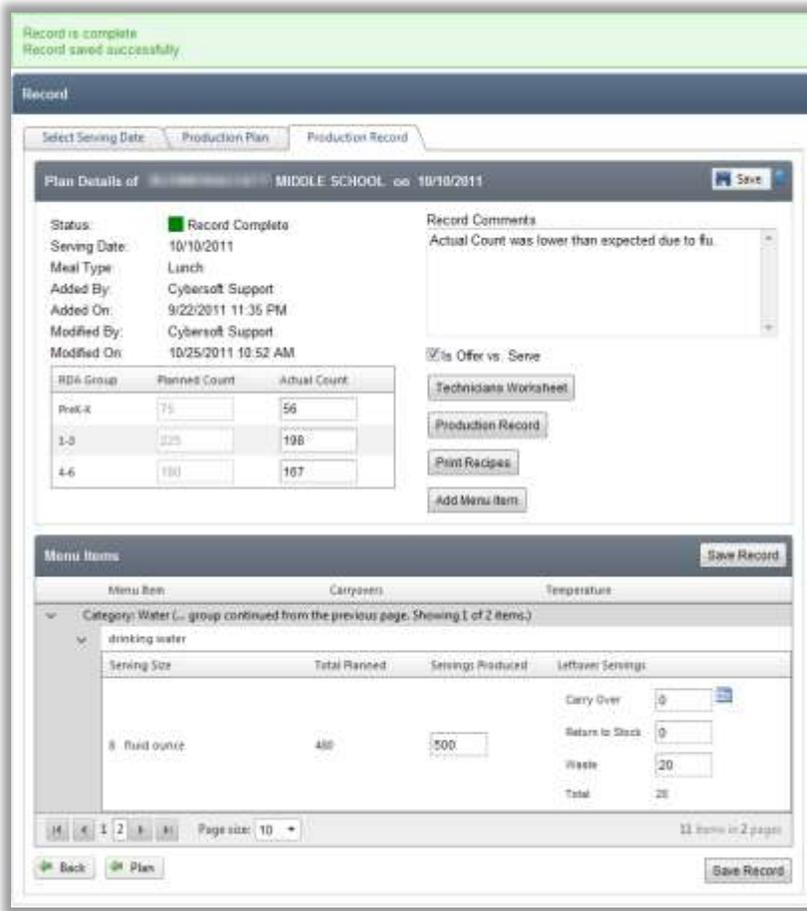
The selected date and meal service appears next to the Carry Over count.

- In **Return to Stock**, enter the menu item count that is to be returned to inventory.
- In **Waste**, enter the menu item count that is to be withdrawn and disposed.
- Enter the servings counts for all remaining menu items.



When all counts for all menu items is complete:

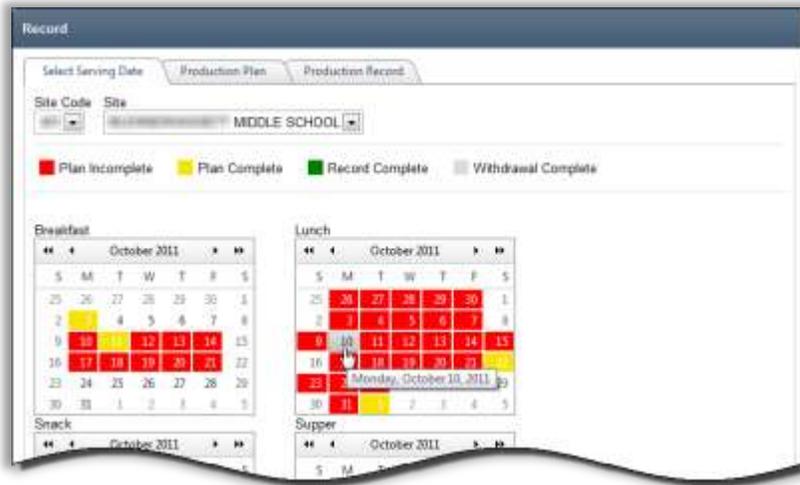
- Click 



A save success message appears.

The record status changes to **Record Complete** (■).

Printing a Production Record



On the *Record* screen:

- Click a date with a status of **Record Complete** (■).



In the Plan Details group on the Production Record tab:

- Click Production Record .

Daily Food Production Record
MIDDLE SCHOOL
Lunch, Serving Date - Monday, October 10, 2011

Offer Vs. Serve: YES

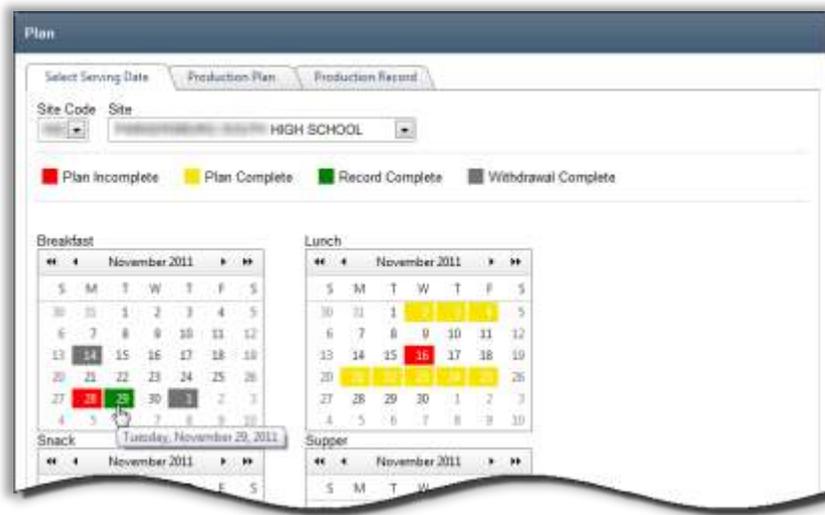
Meal Count	Planned	Actual
PreK-K	75	50
1-3	225	198
4-6	180	167

Plan Comments: Use this same plan for all lunches during the month of November.

Record Comments: Actual Count was lower than expected due to flu.

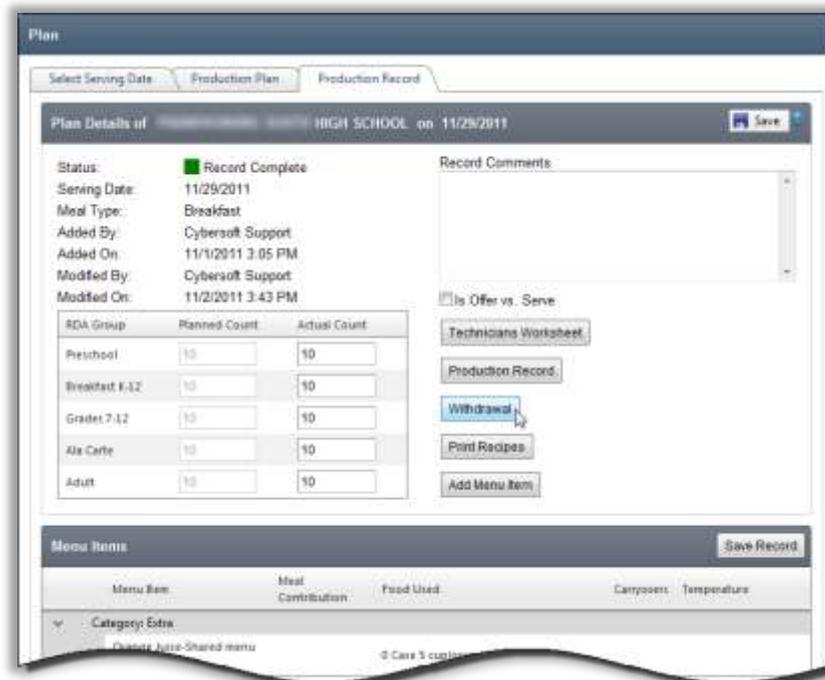
Menu Item (Recipe #)	PreK-K	1-3	4-6	Total Planned	Servings Produced	Qty Prepared	Left Over	Comments
Lg Milk (choose up to 1)								
Chocolate Milk Shake (LR100110)	10 (1 container)	10 (1 container)	15 (1 container)	35 (1 container)	35 (1 container)			
Milk, Skim (LR100077)	100 (1/2 16oz glass)	10 (1/2 16oz glass)	5 (1 16oz glass)	115 (1/2 16oz glass) + (1 16oz glass)	110 (1/2 16oz glass) + (1 16oz glass)			
drinking water (LR100081)	15 (8 fl. oz.)	50 (8 fl. oz.)	50 (8 fl. oz.)	115 (8 fl. oz.)	115 (8 fl. oz.)	LI100090 (920 fl. oz.)		
Meats (choose up to 2)								
Turkey Snackers (LR100108)	25 (1 c.)	10 (1 c.)	32 (1 c.)	67 (1 c.)	60 (1 c.)	LI100101 (60 c.)	CarryOver 35 (1 c.) to 10/24/2011 Return to Stock 0 (1 c.) Waste 1 (1 c.)	
bagels (LR100088)	10 (1 small 2 in)	5 (1 small 2 in)	5 (1 small 2 in)	20 (1 small 2 in)	21 (1 small 2 in)		CarryOver 1 (1 small 2 in) to 10/24/2011 Return to Stock 0 (1 small 2 in) Waste 0 (1 small 2 in)	
beans cooked and fried (LR100182)	10 (1 c.)	15 (1 c.)	33 (1 c.)	48 (1 c.)	50 (1 c.)	LI100073 (4 oz.) LI100030 (2 oz.) LI100074 (20 lb.) LI14180 (2 c.) LI100031 (2 c.) LI15620 (2 oz.)	CarryOver 13 (1 c.) to 10/24/2011 Return to Stock 0 (1 c.) Waste 1 (1 c.)	
Cajun Dirty Rice (LR100032)	30 (1 cup, cooked)	138 (1 cup, cooked)	175 (1 cup, cooked)	343 (1 cup, cooked)	298 (1 cup, cooked)	LI100048 (8 lb. bag.) LI100040 (400 c.)		
Water (choose up to 1)								
Bottled Water (LR100080)	0 (10 fl. oz.)	0 (10 fl. oz.)	0 (10 fl. oz.)	0 (10 fl. oz.)		LI100089 (0 fl. oz.)		
drinking water (LR100081)	75 (8 fl. oz.)	180 (8 fl. oz.)	225 (8 fl. oz.)	480 (8 fl. oz.)	500 (8 fl. oz.)	LI100090 (4000 fl. oz.)		

Withdrawing Items from Inventory



On the **Select Serving Date** tab of the *Plan* screen:

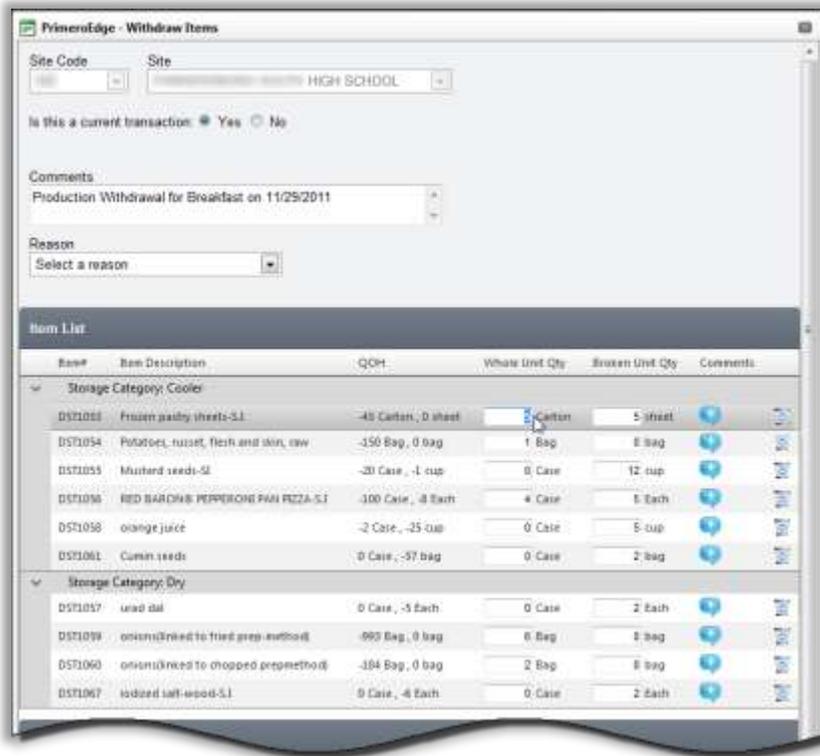
- Click a calendar date with a status of "Record Complete".



On the Production Record tab:

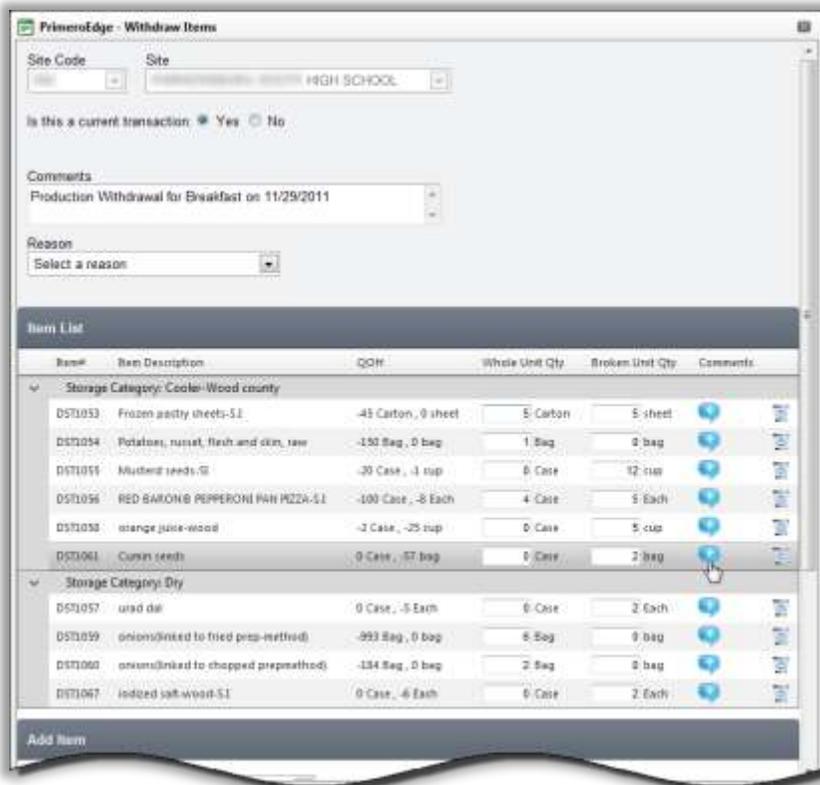
- Click

Withdrawal

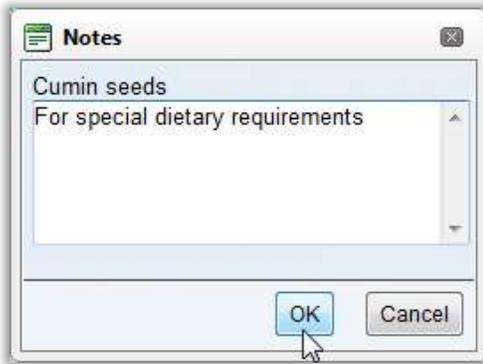


In the Item List:

- Change quantities in **Whole Unit Qty** and/or **Broken Unit Qty**, as needed by entering new amounts.

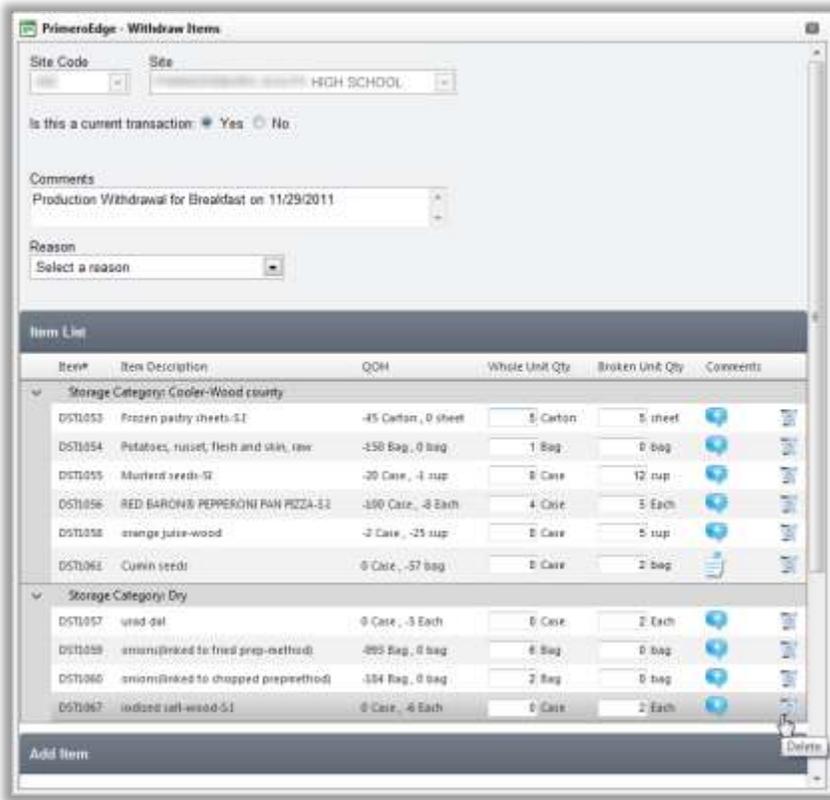


- Add comments to an item by clicking **Add Comment** () in an item listing.

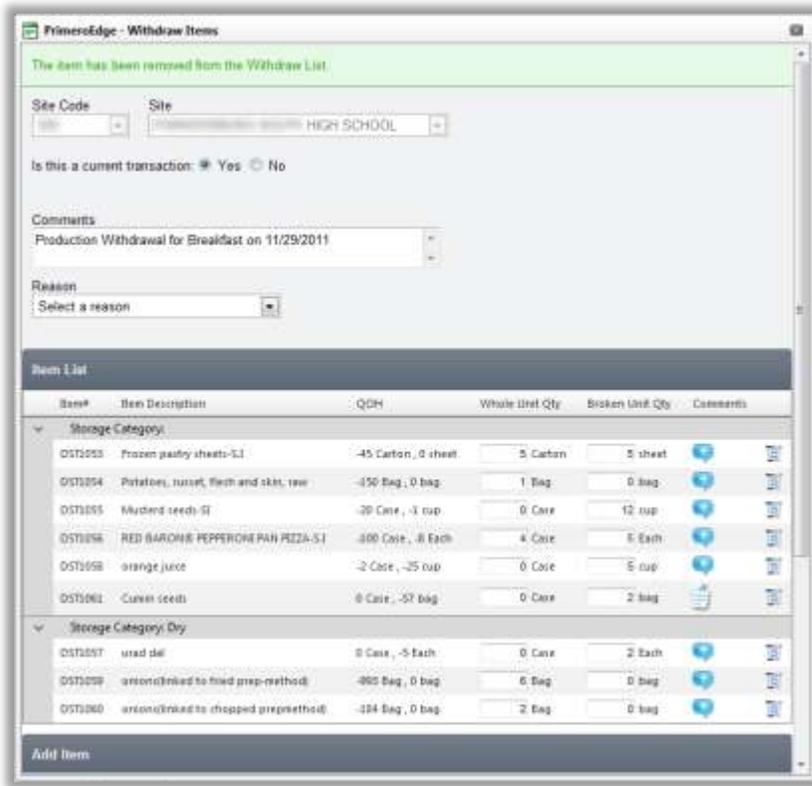


In the *Notes* dialog:

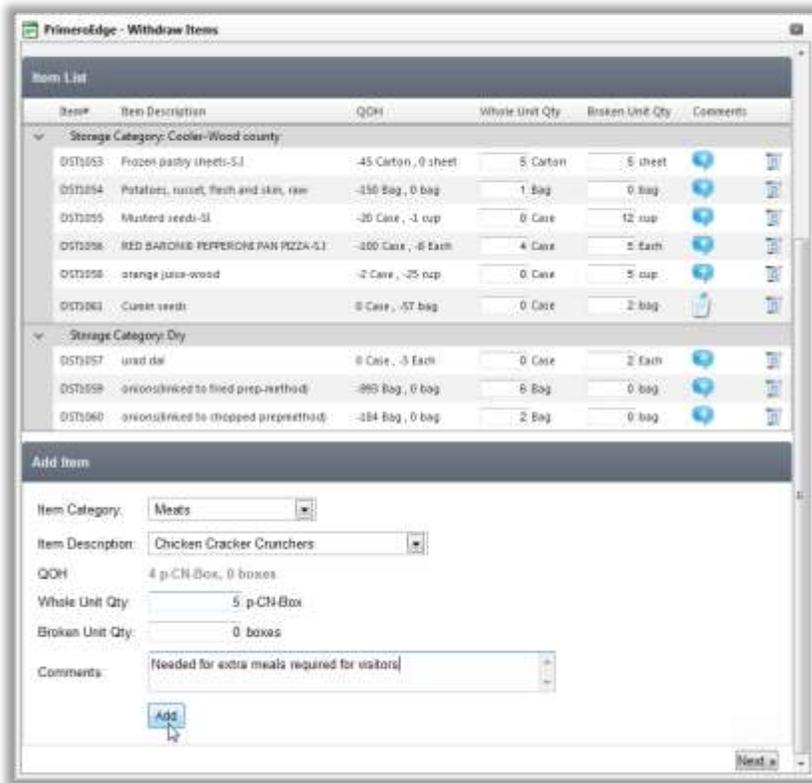
- Enter comment text.
- Click .



- Delete an item by clicking **Delete** () in an item listing.

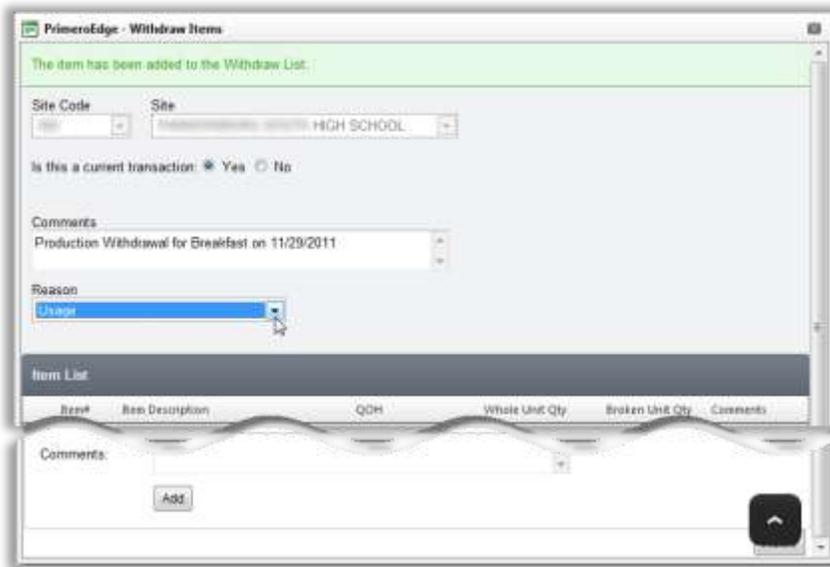


The item is removed and a removal message appears.



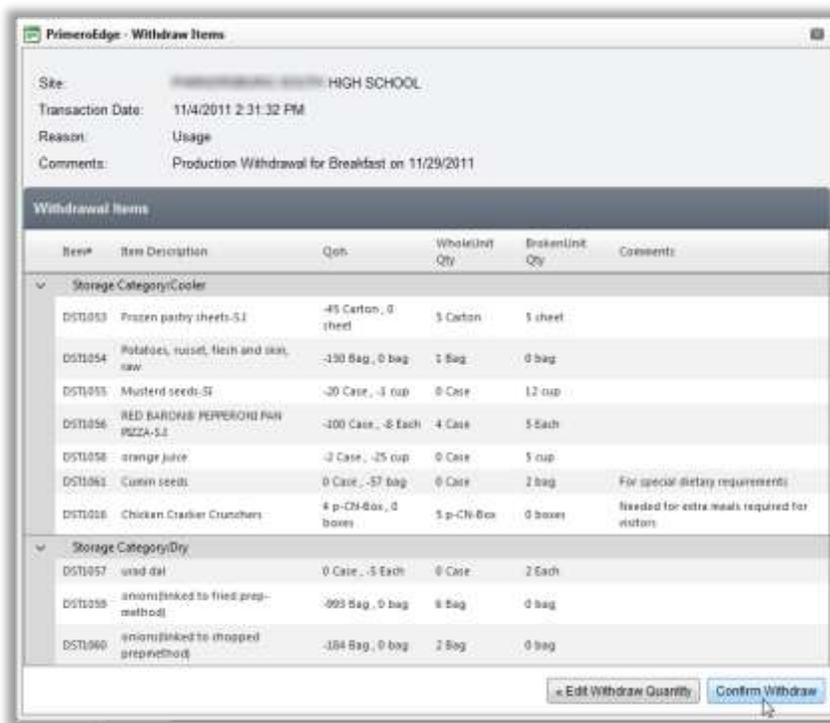
Add an item by:

- In **Item Category**, choose a category.
- In **Item Description**, choose an item.
- In **Whole Unit Qty**, enter the number of whole units to withdraw.
- In **Broken Unit Qty**, enter the number of broken units to withdraw.
- In **Comments**, enter comment text to document the addition.
- Click .



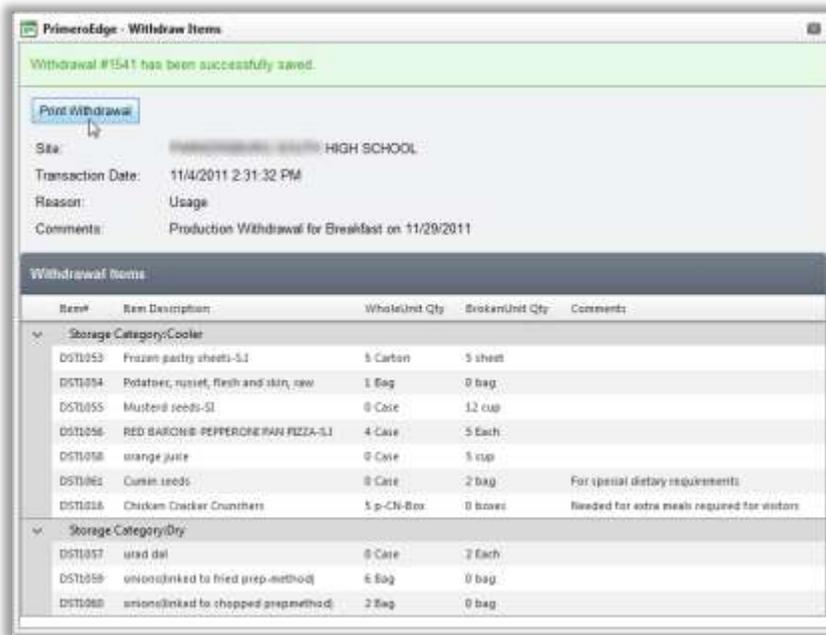
An add message appears.

- In **Reason**, choose a reason for the withdrawal.
- Click



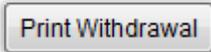
In the *Withdraw Items* dialog:

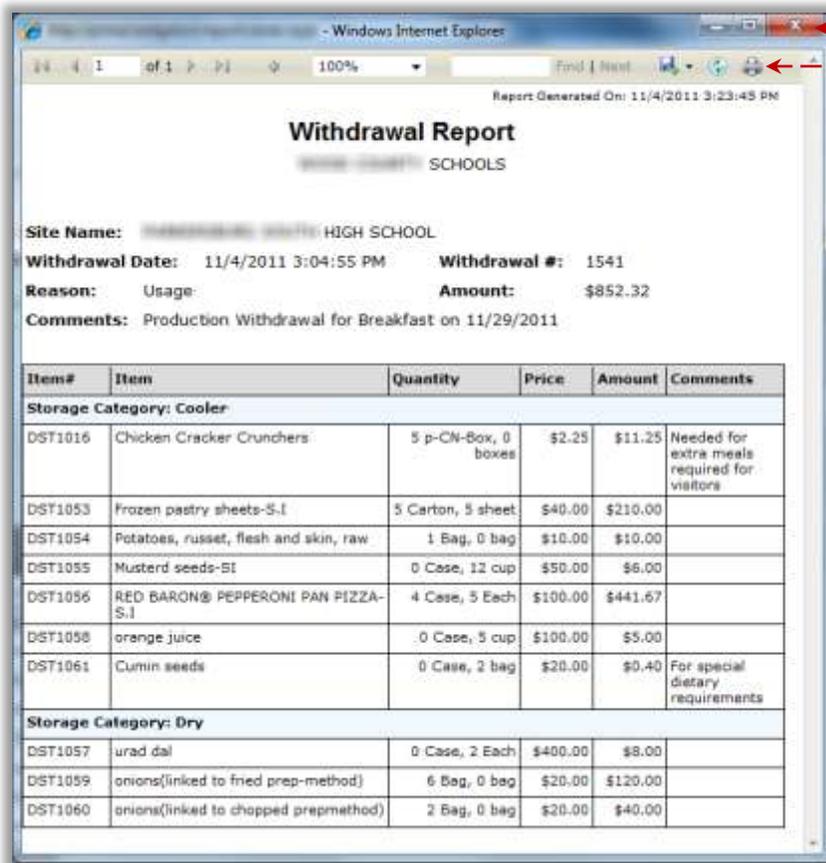
- Review the items, quantities, and comments for each listed item.
- Click **< Edit Withdraw Quantity** to return to the editable *Withdraw Items* dialog and make changes.
- Click **Confirm Withdraw** to complete the withdrawal.



A save success message appears.

To print the withdrawal:

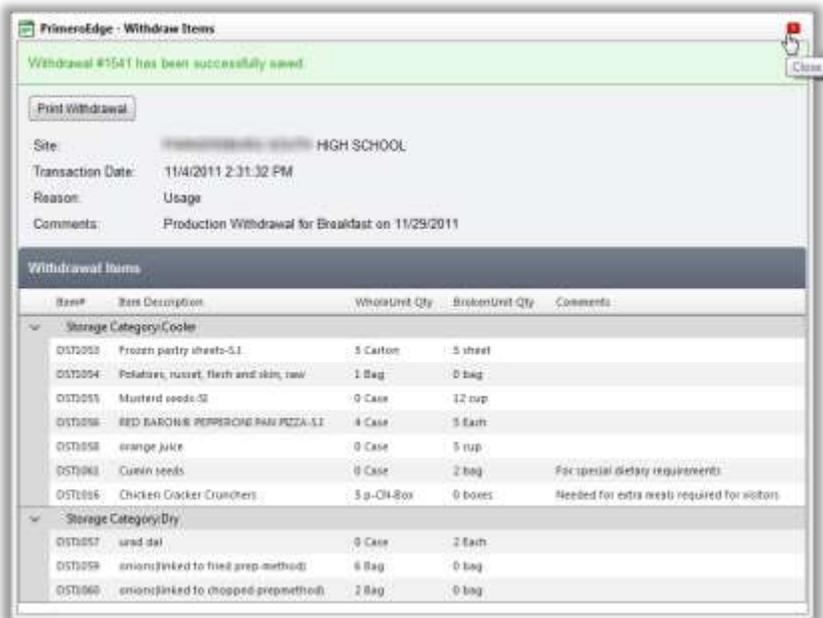
- Click 



On the *Report Viewer* window toolbar:

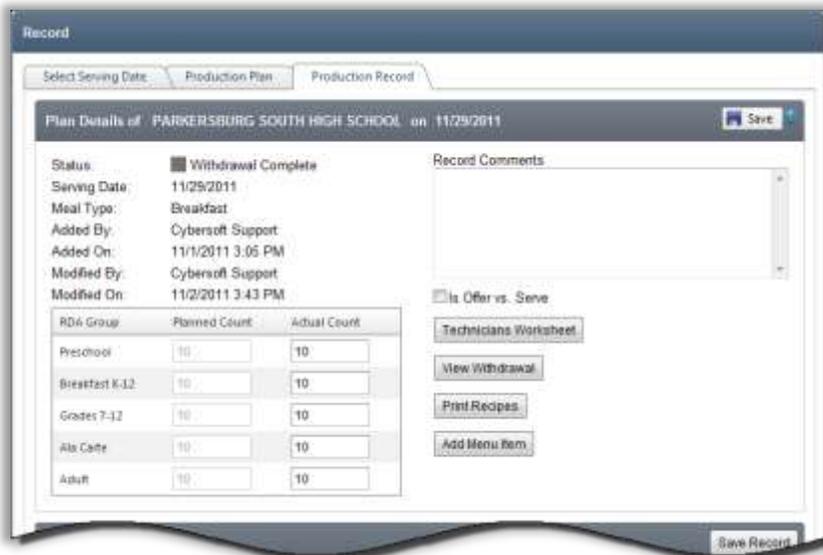
- Click Print ().
- Click Close () to close the *Report Viewer* window.

★ This report may have multiple pages. Check the page count on the *Report Viewer* window toolbar.



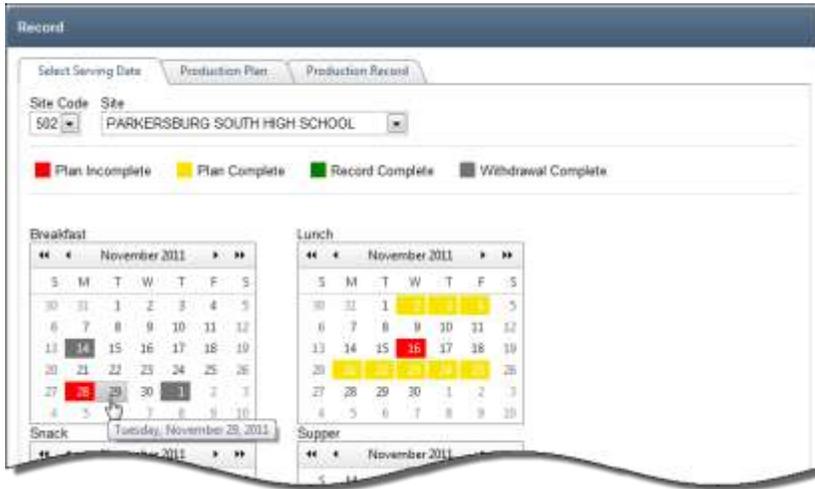
A save success message appears.

- Click **Close** ().



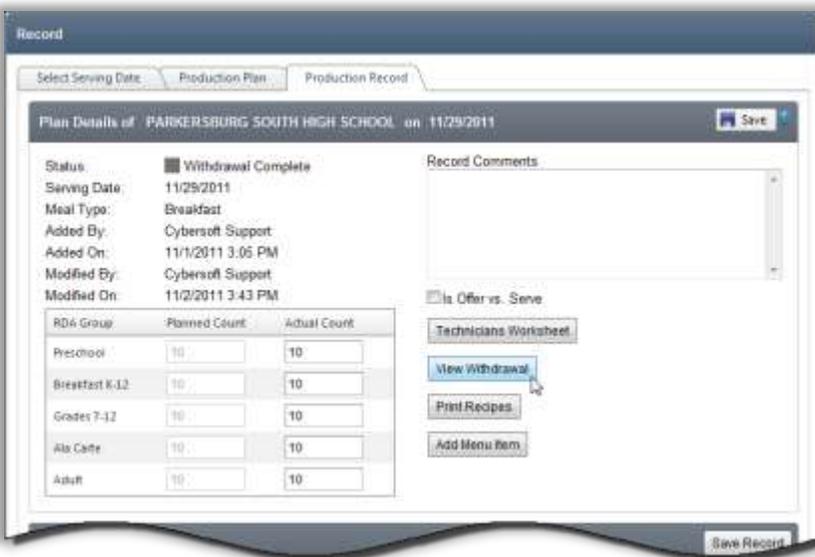
The Production Record status changes to " Withdrawal Complete".

Viewing a Withdrawal



On the **Select Serving Date** tab of the *Record* screen:

- Click a date with a status of "Withdrawal Complete".



On the Production Record tab:

- Click [View Withdrawal](#).

PrimerEdge - Withdraw Items

Adjust Withdrawal Cancel Withdrawal Print Withdrawal

Site: HIGH SCHOOL
 Transaction Date: 11/4/2011 3:04:55 PM
 Reason: Usage
 Comments: Production Withdrawal for Breakfast on 11/29/2011

Item#	Item Description	WholeUnit Qty	BrokenUnit Qty	Comments
Storage Category:Cooler				
DST1028	Chicken Cracker Crunchers	5 p-CN-Box	0 boxes	Needed for extra meals required for visitors
DST1061	Cumin seeds	0 Case	2 bag	For special dietary requirements
DST1053	Frozen pastry sheets-S1	5 Carton	5 sheet	
DST1055	Mustard seeds-S1	0 Case	12 cup	
DST1058	orange juice	0 Case	5 cup	
DST1054	Potatoes, russet, fresh and skin, raw	1 Bag	0 bag	
DST1098	RED BARONIE PEPPERONI PAN PIZZA-S1	4 Case	3 Each	
Storage Category:Dry				
DST1060	onions(linked to chopped prep-method)	2 Bag	0 bag	
DST1059	onions(linked to fried prep-method)	6 Bag	0 bag	
DST1057	urad dal	0 Case	2 Each	

Adjusting a Withdrawal

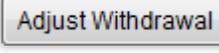
PrimerEdge - Withdraw Items

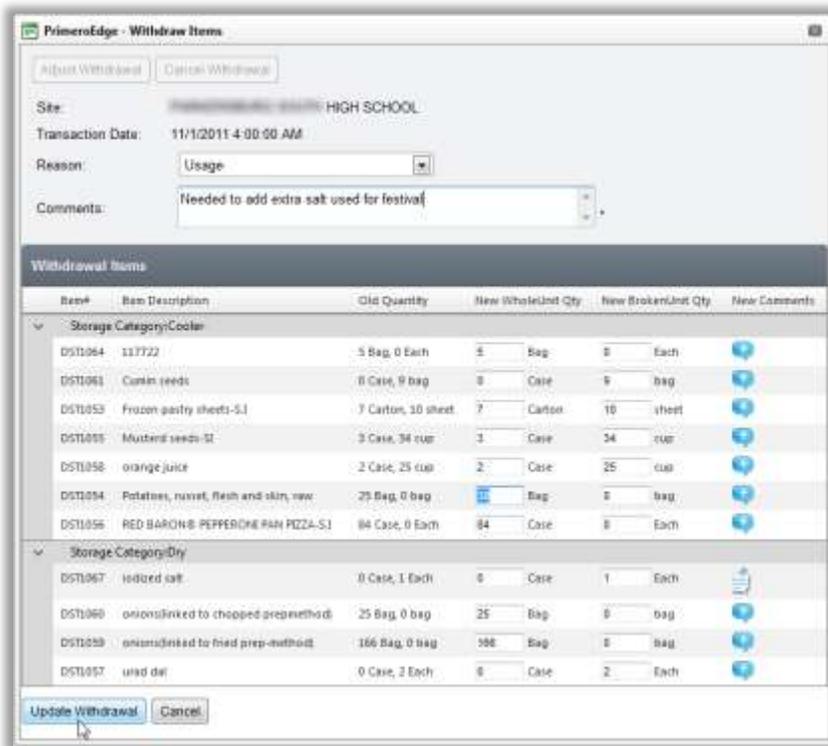
Adjust Withdrawal Cancel Withdrawal Print Withdrawal

Site: HIGH SCHOOL
 Transaction Date: 11/1/2011 4:00:05 AM
 Reason: Usage
 Comments: Production Withdrawal for Breakfast on 12/01/2011

Item#	Item Description	WholeUnit Qty	BrokenUnit Qty	Comments
Storage Category:Cooler				
DST1064	11772	5 Bag	0 Each	
DST1061	Cumin seeds	0 Case	8 bag	
DST1053	Frozen pastry sheets-S1	7 Carton	10 sheet	
DST1055	Mustard seeds-S1	3 Case	34 cup	
DST1058	orange juice wood	2 Case	25 cup	
DST1054	Potatoes, russet, fresh and skin, raw	25 Bag	0 bag	
DST1098	RED BARONIE PEPPERONI PAN PIZZA-S1	04 Case	0 Each	
Storage Category:Dry				
DST1067	iodized salt-wood-S1	0 Case	1 Each	
DST1060	onions(linked to chopped prep-method)	25 Bag	0 bag	
DST1059	onions(linked to fried prep-method)	366 Bag	0 bag	
DST1057	urad dal	0 Case	2 Each	

- Display a withdrawal from the **Production Record** tab of a date with a status of "Withdrawal Complete".

- Click 

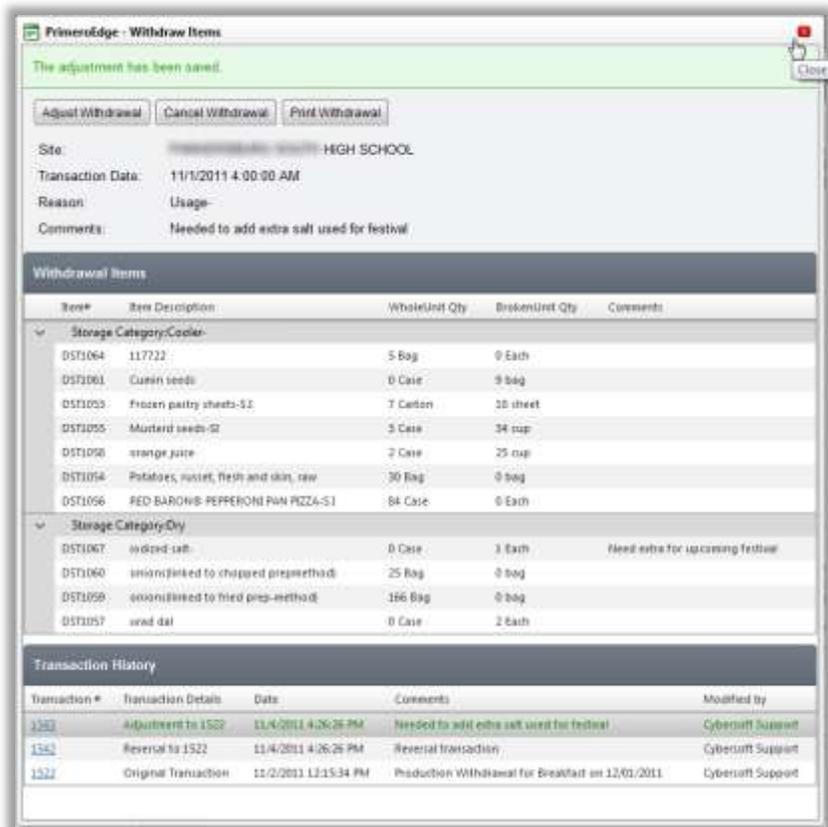


In the *Withdraw Items* dialog:

- Change quantities in **New Whole Unit Qty** and **New Broken Unit Qty** as needed.
- Add comments to withdrawal items, as needed.

Update Withdrawal

- Click



A save message appears.

The Transaction History appears with a list of all transactions associated with the withdrawal.

- Click **Close** ().

Canceling a Withdrawal

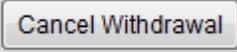
PrimerEdge - Withdraw Items

Adjust Withdrawal Cancel Withdrawal Print Withdrawal

Site: HIGH SCHOOL
 Transaction Date: 11/2/2011 3:41:28 PM
 Reason: Usage
 Comments: Production Withdrawal for Breakfast on 11/14/2011

Item#	Item Description	WholeUnit Qty	BrokenUnit Qty	Comments
Storage Category: Cooler				
DST1061	Cumin seeds	0 Case	48 bag	
DST1033	Frozen pastry sheets-S1	37 Carton	10 sheet	
DST1055	Mustard seeds-S1	18 Case	87 cup	
DST1054	Potatoes, russet, flesh and skin, raw	125 Bag	0 bag	
DST1056	RED BARONE PEPPERONI PAN PIZZA-S1	16 Case	8 Each	
Storage Category: Dry				
DST1067	Iodized salt	0 Case	5 Each	
DST1060	onion(linked to: chopped prep-method)	139 Bag	0 bag	
DST1059	onion(linked to: fried prep-method)	827 Bag	0 bag	
DST1057	urad dal	0 Case	3 Each	

- Display a withdrawal from the **Production Record** tab of a date with a status of "Withdrawal Complete".

- Click .

Notes

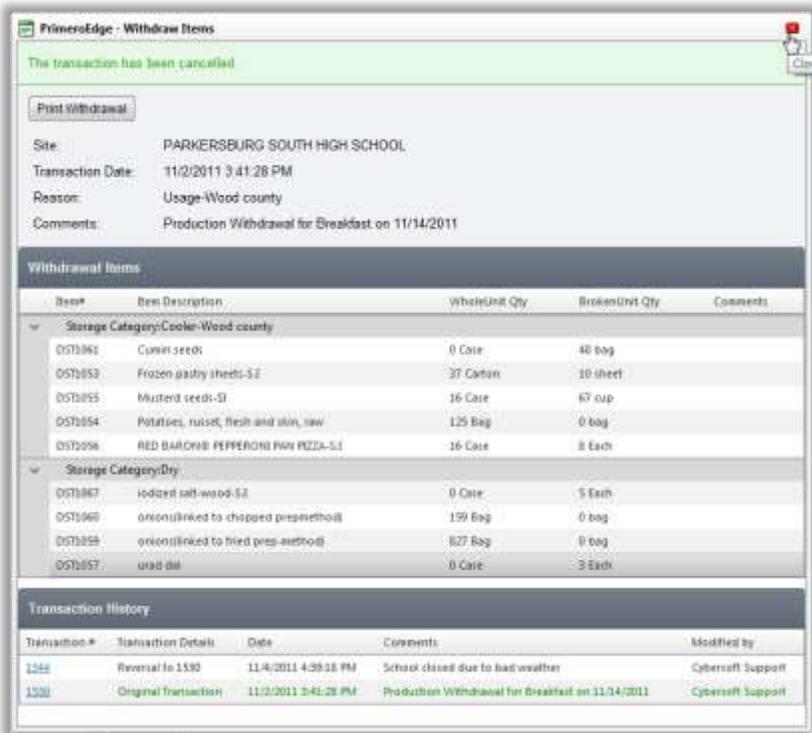
Cancel Comments (required)
 School closed due to bad weather

OK Cancel

In the *Notes* dialog:

- Enter comments to document the cancellation of the withdrawal.

- Click .

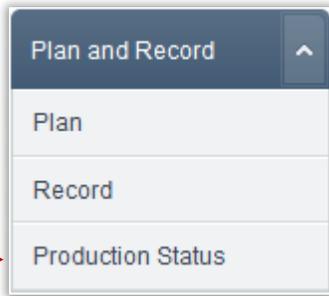


A cancellation message appears.

The Transaction History is updated to reflect the cancellation.

- Click **Close** ().

Production Status



Production Status displays a set of listings for a selected site, meal type, date range and status.



By default, on the *Production Status* page:

- **Site Code**, **Site** and **Meal Type** are set to "ALL".
- **From** and **To** are set to a date range from the current date and prior seven days.
- **Status** is set to "Plan not Complete".

Page Functions

Button	Description
	Click to display all records that meet the selected search conditions.

Listings: Sessions

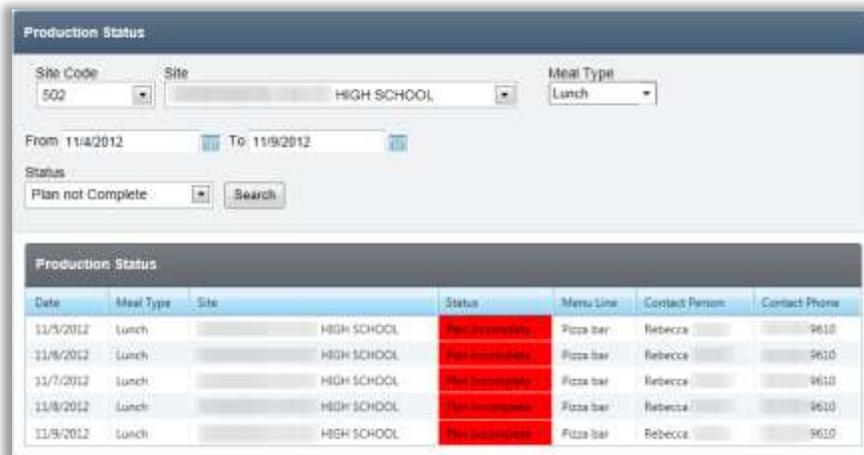
Production Status						
Date	Meal Type	Site	Status	Menu Line	Contact Person	Contact Phone
11/5/2012	Lunch	HIGH SCHOOL	Plan Incomplete	Pizza bar	Rebecca	9610
11/6/2012	Lunch	HIGH SCHOOL	Plan Incomplete	Pizza bar	Rebecca	9610
11/...		HIGH SCHOOL	Plan Incomplete		Rebecca	9610

Header Name	Description
Date	Calendar date in the selected date range.
Meal Type	Meal service.
Site	Site or location where meal was served.
Status	Selected production plan status
Menu Line	Individual menu line.
Contact Person	Name of person listed in Contact Person on the General tab of the <i>Sites</i> page in [System] .
Contact Phone	Phone number listed in Contact Phone on the General tab of the <i>Sites</i> page in [System] .

Displaying Selected Status Listings



- On the *Production Status* page:
- Select search conditions/criteria.
 - Click  .



All listings meeting the selected conditions are displayed in the **Production Status** list.

Chapter 4:

Order

In this chapter you will learn:

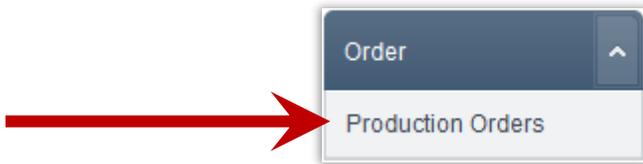
- ✓ Generate a vendor order from a Production Record.
- ✓ Change a vendor order.
- ✓ Place a vendor order.
- ✓ Cancel a vendor order
- ✓ Print stock items from a Production Record.

Order at a Glance

Menu Function	Description
Production Orders	Display lists of production records by site, meal type and status for a date range.

Note: The menus and functions to which you have access are those appropriate for your role with PrimeroEdge. When you access the **Order** menu, you may see a subset of the functions listed above.

Production Orders



Production Orders display a list of all generated orders for a selected location and date or date range.

Production Orders

Area: WOOD COUNTY SCHOOLS | Site Code: 201 | Site: BLENNERHASSETT ELEMENTARY SCHOOL

From: 1/19/2013 | To: 1/25/2013 | One Order Per Vendor | [Get Details](#)

The system setting, "[Production Order Dates Types](#)", specifies whether to display **From / To** selections for a custom date range (first image) or to display a list of week selections (second image) for the next eight weeks.

Production Orders

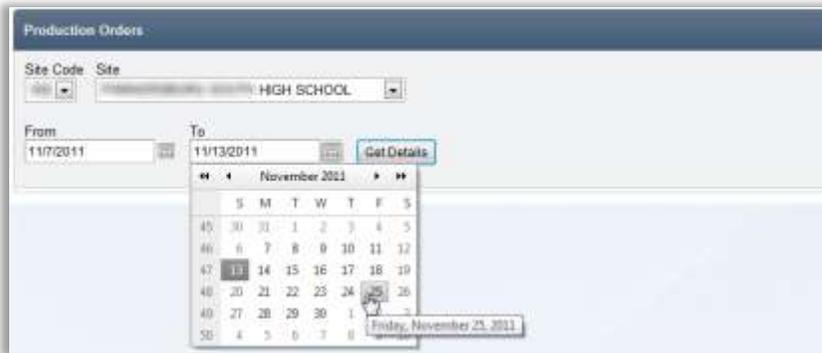
Area: SCHOOLS | Site Code: 201 | Site: ELEMENTARY SCHOOL

01/28/2013 to 02/03/2013 | One Order Per Vendor | [Get Details](#)

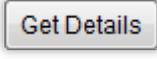
By default, on the *Production Orders* page:

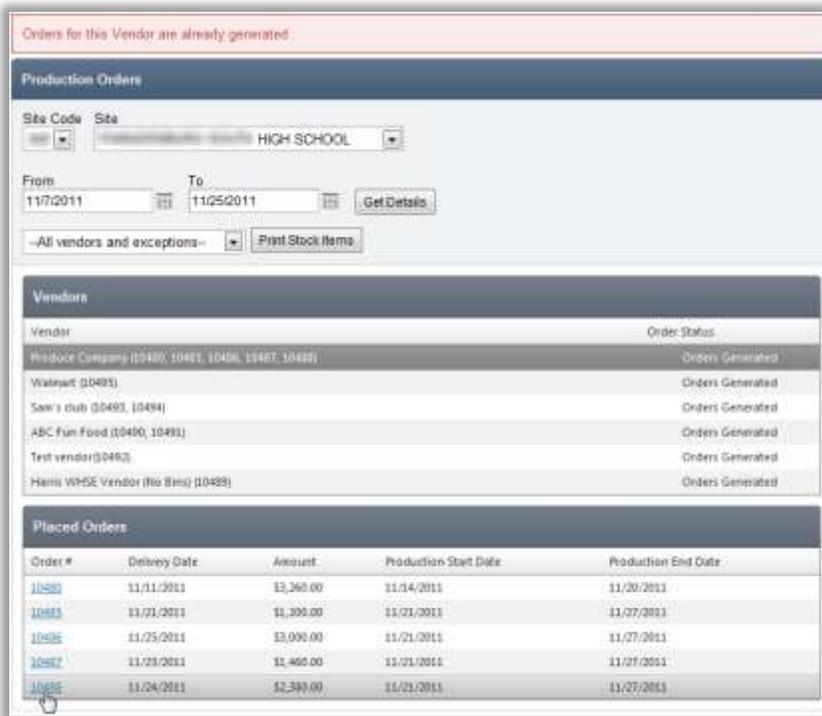
- **Area**, **Site Code** and **Site** are set to the first selection in the list of selections.
- **From** and **To** are set to a date range from the next day's date forward seven days.
- (Week Selections) is set to the next week.
- **One Order Per Vendor** options is cleared/not selected (no check mark).

Displaying Generated Orders



On the *Production Orders* screen:

- Select a site code/site.
- Select a week or a date range.
- Click  .



A message appears to let you know that orders for the selected vendor have been generated.

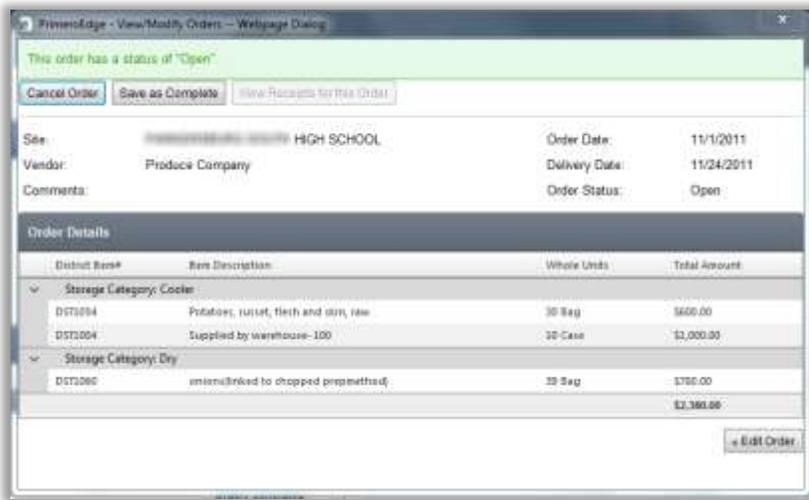
All vendors from whom recipe ingredients will be ordered are shown in the **Vendors** list.

Order Status displays "Orders Generated" when a vendor is selected in the **Vendors** list that has generated orders. A message appears to let you know that orders for the selected vendor have been generated.

For vendors with generated orders, the order number(s) appear next to the vendor name.

In the **Placed Orders** list:

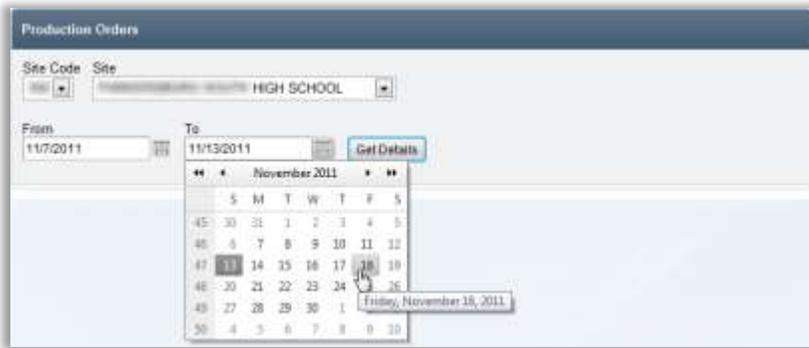
- Click the [Order #](#) in an order listing.



A status message appears above the order.

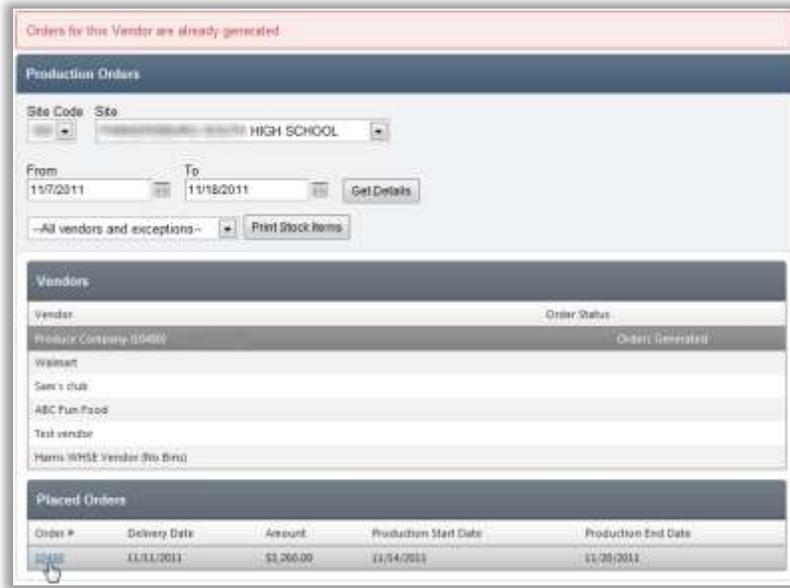
On this screen, the order can be cancelled, changed or saved as complete.

Changing an Order



On the *Production Orders* screen:

- Select a site code/site.
- Select a week or a date range.
- Click  .

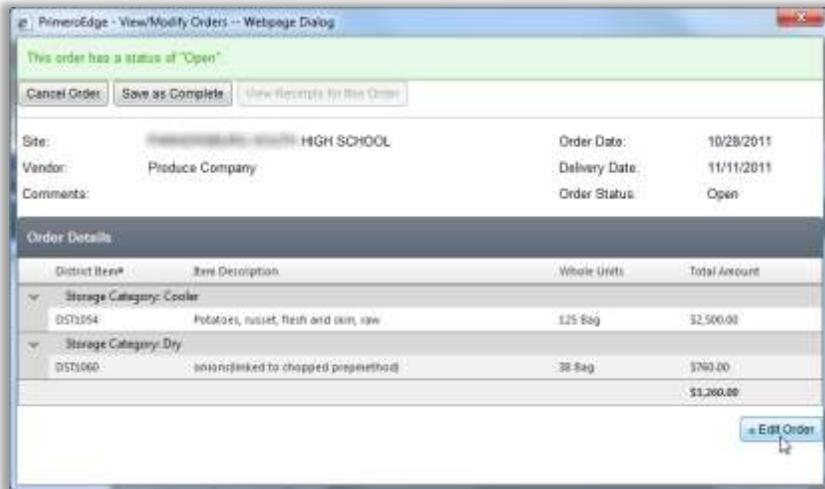


In the **Vendors** list:

- Select a vendor with "Orders Generated" in **Order Status**.

In the **Placed Orders** list:

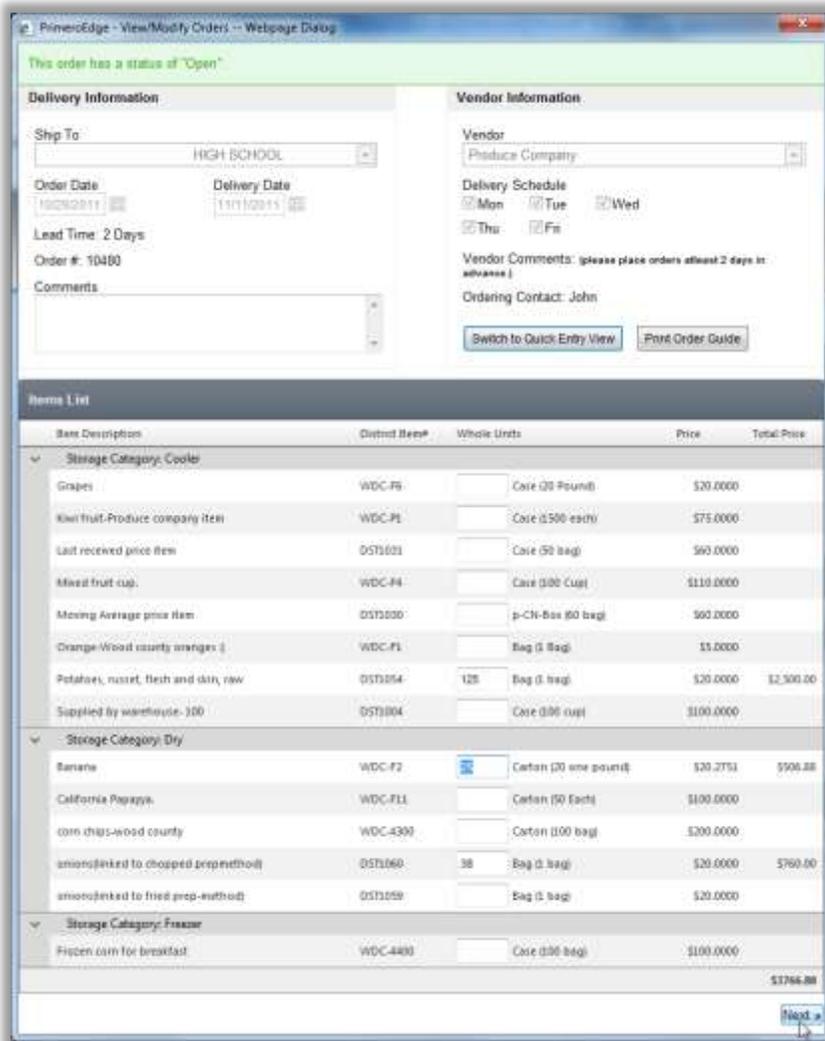
- Click [Order #](#) in an order listing.



In the View/Modify Orders dialog:

- Verify that the order has a status of "Open".

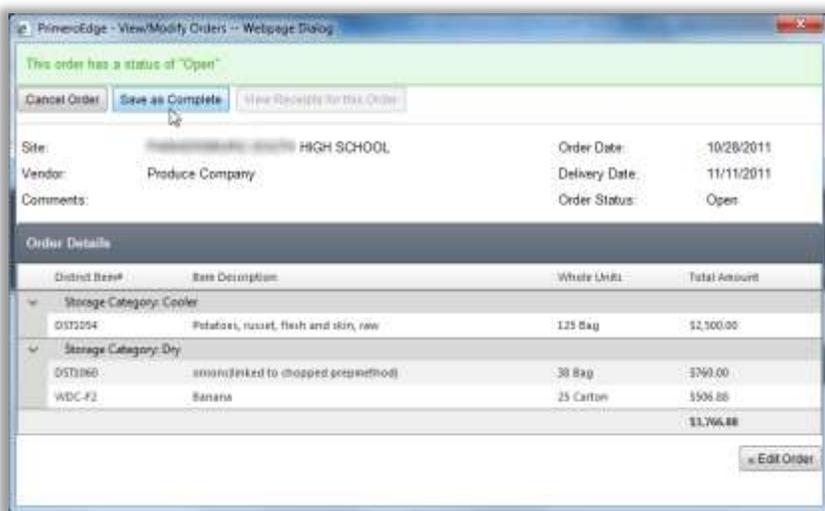
- Click



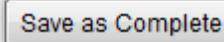
In the expanded View/Modify Orders dialog, do one or more of:

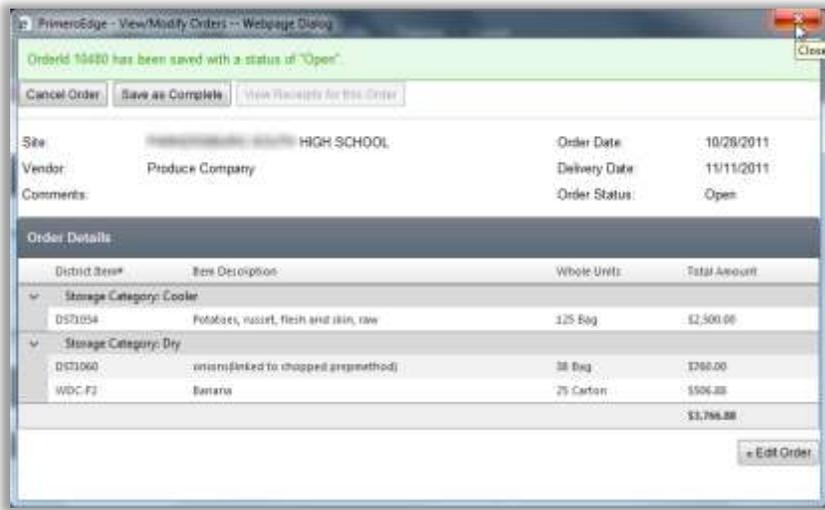
- To add an item, enter an amount in Whole Units.
- To remove an ordered item, clear the amount in Whole Units.
- To change the quantity of an ordered item, change the amount in Whole Units.
- Add comments, if needed, to document the changes.

▪ Click 



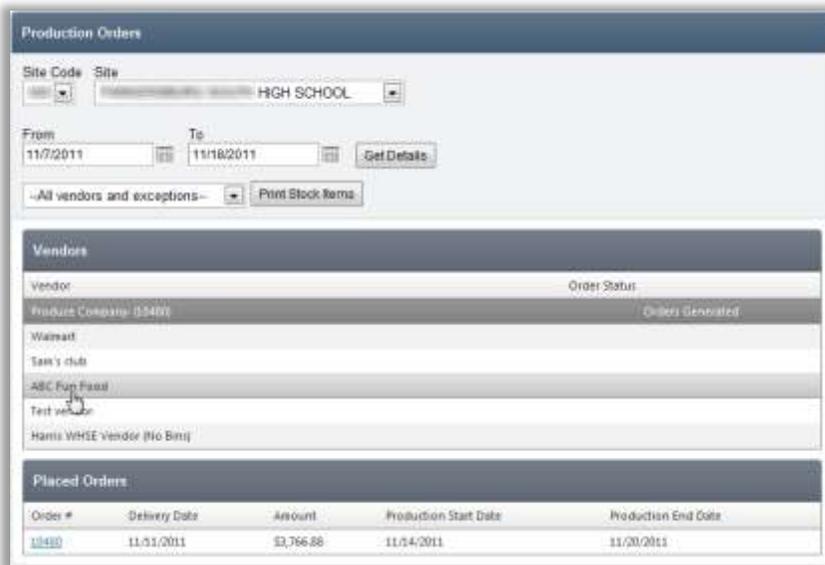
In the View/Modify Orders dialog:

▪ Click 



A save message appears.

Placing an Order



On the Production Orders screen:

- Display a list of vendors/orders for a selected site and week/date range.
- Select a vendor that **does not have** an **Order Status** of "Orders Generated".

Production Orders

Site Code Site
 HIGH SCHOOL

From 11/7/2011 To 11/10/2011

-All vendors and exceptions-

Vendors

Vendor	Order Status
Produce Company (10480)	Orders Generated
Wal-Mart	
Sami's club	
ABC Fun Food	
Test vendor	
Harris WARE Vendor (No Bnd)	

Items Supplied by the Vendor

Item#	Item Description	Whole Units	Price	Total
Delivery Date: 11/10/2011				
D51067	iced tea	1 Case (10 Each)	\$10.0000	\$10.00
D51053	Frozen party	38 Carton (30 sheet)	\$40.0000	\$1,520.00

Add Item

Item# Item Units

Delivery Date 11/10/2011 Price Whole Units

In Items Supplied by the Vendor:

- Review the items and quantities for each delivery date.
- Make changes as needed to the quantities in **Whole Units**.

The screenshot displays the 'Production Orders' application window. At the top, there are fields for 'Site Code' (set to 'HIGH SCHOOL') and 'Site'. Below this, 'From' and 'To' date pickers are set to '11/7/2011' and '11/18/2011' respectively, with a 'Get Details' button. A dropdown menu is set to '-All vendors and exceptions-' and a 'Print Stock Items' button is present.

The 'Vendors' section lists several vendors: 'Produce Company (0480)', 'Wal-Mart', 'Sam's club', 'ABC Fun, Food', 'Test vendor', and 'Harris WHSE Vendor (file bin)'. The 'Order Status' column for 'Produce Company (0480)' shows 'Orders Generated'.

The 'Items Supplied by the Vendor' section contains a table with the following data:

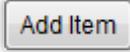
Item#	Item Description	Whole Units	Price	Total
Delivery Date: 11/07/2011				
DST067	Iodized salt-	1 Case (50 Each)	\$10.0000	\$10.00
DST053	Frozen party	36 Carton (30 each)	\$40.0000	\$1,320.00

Below the table is the 'Add Item' section with the following fields:

- Item#: DST1045
- Item: Bagel, Sesame Seed, Sliced, Bake Crafters, as served
- Units: Bag (25 each)
- Delivery Date: 11/10/2011
- Price: \$20.5231
- Whole Units: 10

An 'Add Item' button is located below these fields, and a 'Next >' button is at the bottom right of the window.

To add a new item:

- In **Item#**, enter an item number or select the item from the **Item** list.
- In **Whole Units**, enter the quantity needed.
- Click 

The screenshot shows the 'Production Orders' interface. At the top, there are fields for 'Site Code' (set to 'HIGH SCHOOL') and 'Site'. Below these are date pickers for 'From' (11/7/2011) and 'To' (11/18/2011), with a 'Get Details' button. A dropdown menu is set to '--All vendors and exceptions--' and a 'Print Stock Items' button is visible.

The 'Vendors' section lists several vendors with their 'Order Status':

Vendor	Order Status
Produce Company (0400)	Orders Generated
Walmart	
Sain's club	
ABC Fun Food	
Test vendor	
Hams WHSE Vendor (No Bmi)	

The 'Items Supplied by the Vendor' section contains a table with the following data:

Item#	Item Description	Whole Units		Price	Total
Delivery Date: 11/10/2011					
DST067	Iodized salt	1	Case (10 Each)	\$10.0000	\$10.00
DST053	Frozen pasta	38	Carton (30 sheet)	\$40.0000	\$1,520.00
DST045	Bagel, Sesame Seed, Sliced; Bake Crafters; as served	10	Bag (25 each)	\$20.5291	\$205.29

Below the table is an 'Add Item' form with fields for 'Item#', 'Item' (a dropdown menu showing 'Select an item'), 'Units', 'Delivery Date' (11/10/2011), 'Price', and 'Whole Units'. An 'Add Item' button is at the bottom left of the form. A 'Next »' button is located at the bottom right of the entire interface.

The new item appears in the list of items.

- Add more items as needed.
- Click **Next »**.

The screenshot shows the 'Production Orders' interface. At the top, there are fields for 'Site Code' and 'Site' (set to 'HIGH SCHOOL'), and date ranges 'From 11/7/2011' to 'To 11/18/2011'. Below this is a 'Vendors' section with a list of vendors including 'Produce Company (0400)', 'Wal-Mart', 'Sam's club', 'ABC Fun Food', 'Test vendor', and 'Harris WHEE Vendor (No Bins)'. The 'Orders that will be placed' section shows a delivery date of 11/10/2011, an amount of \$1,735.23, and a table of items:

Item#	Item Description	Whole Units	Price	Total
01T1067	iodized salt	1 Case	\$10.00	\$10.00
01T1053	Frozen pastry sheets	38 Carton	\$40.00	\$1,520.00
01T1041	Bagel, Sesame Seed, Shred; Bake Creffers; as served	10 Bag	\$20.52	\$205.23

Buttons for 'Edit Orders' and 'Place Orders' are at the bottom.

The updated order is shown with the new item and order totals.

To add a comment, click

The 'Notes' dialog box is open, showing a text area with the following comment: 'Added bagels for "Bagel Day Celebration"'. The 'OK' button is highlighted with a mouse cursor.

In the *Notes* dialog:

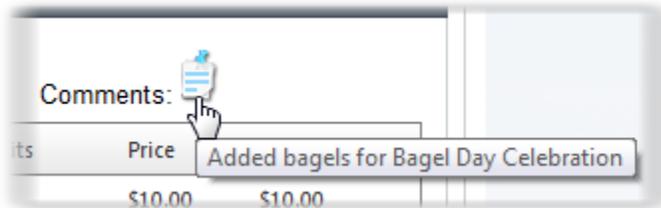
- In **Comments**, enter text to document the changes made.
- Click .

The screenshot shows the 'Production Orders' window. At the top, there are fields for 'Site Code' and 'Site' (set to 'HIGH SCHOOL'), and date ranges for 'From' (11/7/2011) and 'To' (11/18/2011). Below these are buttons for 'Get Details', '-All vendors and exceptions-', and 'Print Stock Items'. A 'Vendors' section lists several vendors with their 'Order Status'. The 'Orders that will be placed' section shows a summary with 'Delivery Date: 11/10/2011' and 'Amount: \$1,735.23'. A table lists items with columns for Item#, Item Description, Whole Units, Price, and Total. A 'Comments' icon is visible next to the summary. At the bottom are 'Edit Orders' and 'Place Orders' buttons.

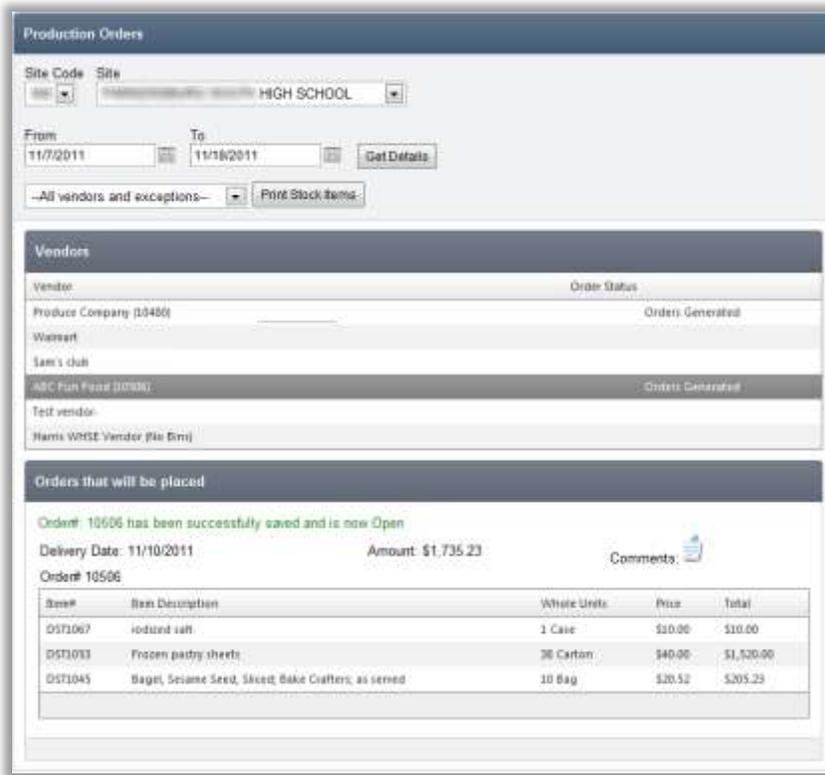
Vendor	Order Status
Produce Company (10480)	Orders Generated
Walmart	
Sains club	
ABC Fun Food	
Test vendor	
Harris WHSE Vendor (No Bmi)	

Item#	Item Description	Whole Units	Price	Total
DIST067	Iodized salt	1 Case	\$10.00	\$10.00
DIST053	Frozen pastry inserts	38 Carton	\$40.00	\$1,520.00
DIST041	Bagel, Sesame Seed, Moist, Bake Creffers; as served	10 Bag	\$20.52	\$205.23

Notice that the Note icon changed to indicate that comments are attached.



When you hover over the Comments icon, comment text is shown.

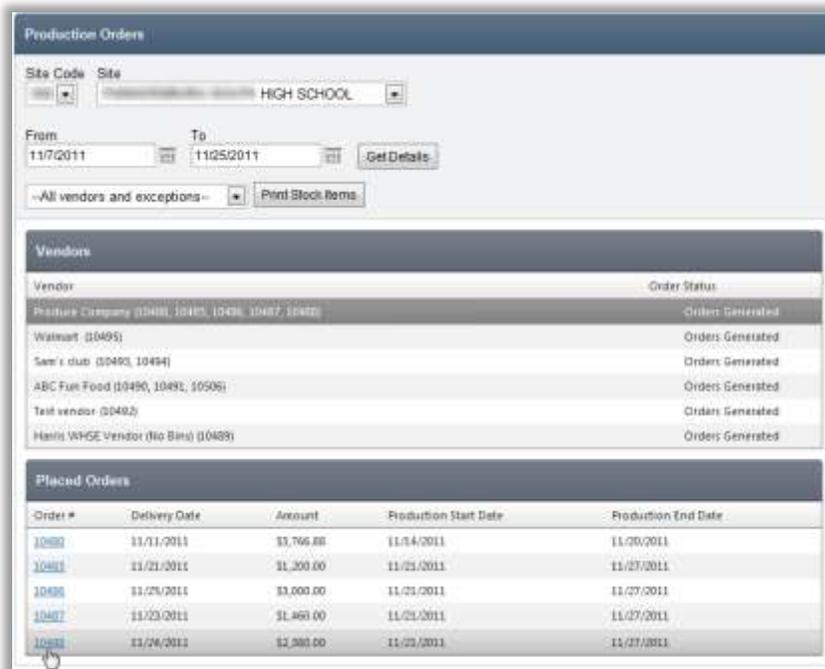


A save success message appears.

The order is given a number.

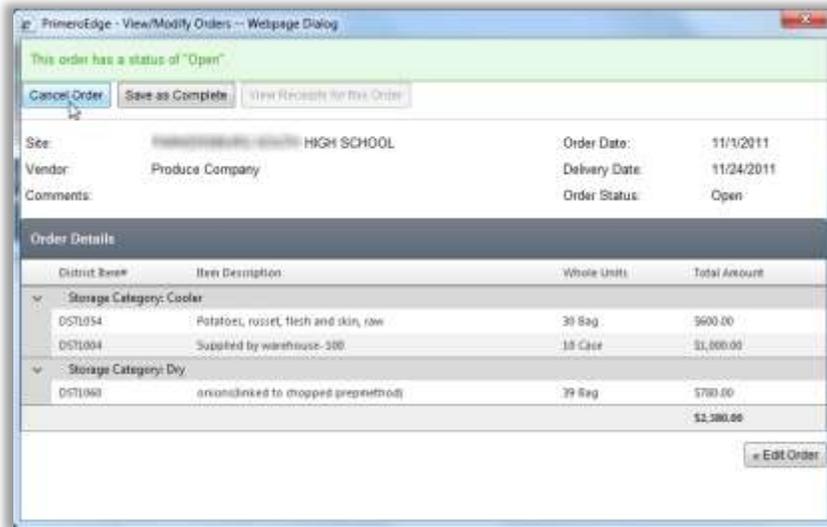
“Orders Generated” appears in **Order Status** in the vendor listing.

Canceling an Order

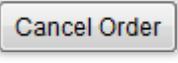


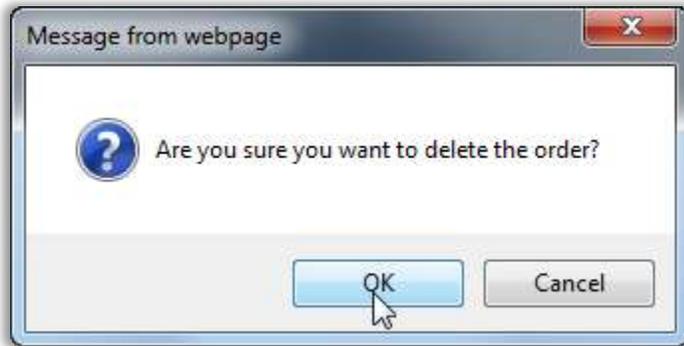
On the Production Orders screen:

- Display a list of placed orders for a selected site and vendor.



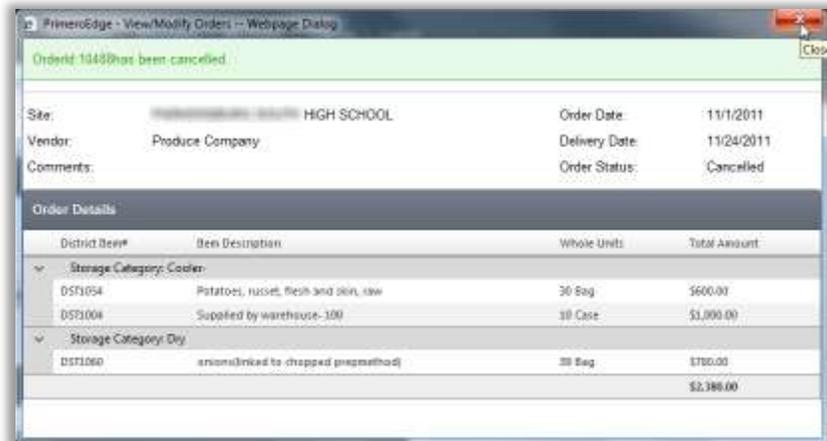
On the View/Modify Orders screen:

- Click 



In the confirmation dialog:

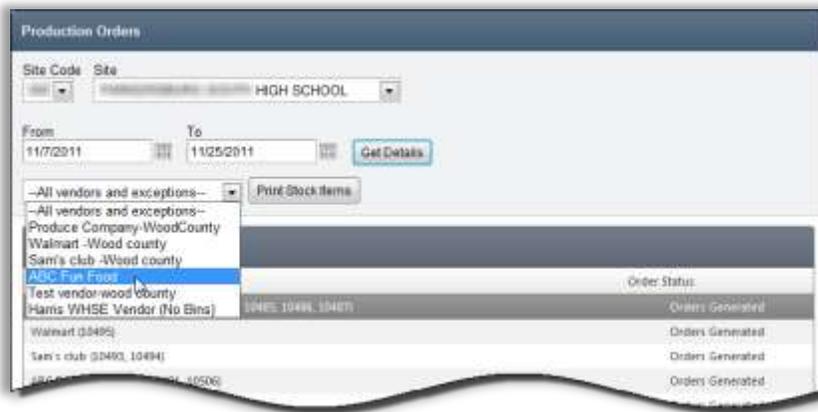
- Click 



A cancel message appears.

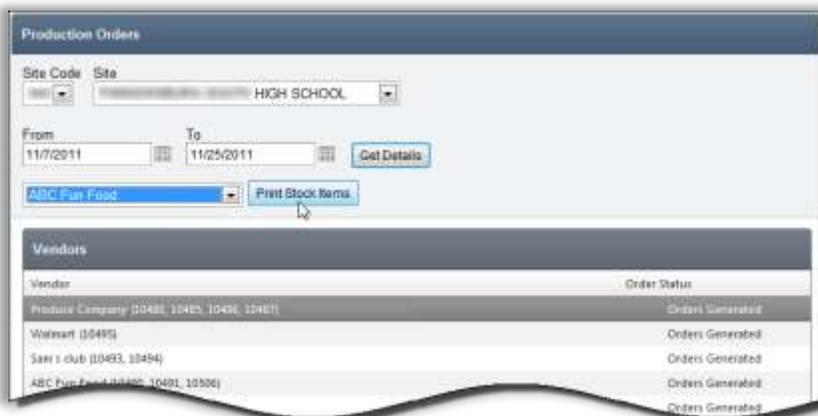
The **Order Status** changes to "Cancelled".

Printing Stock Items



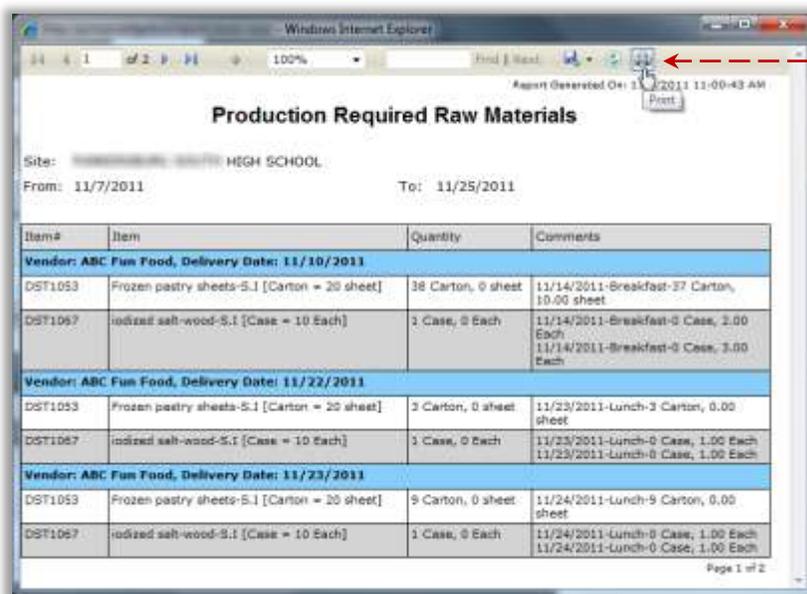
On the Production Orders screen:

- Display a list of placed orders for a selected site and vendor.
- In the drop-down list of vendors, select one vendor.



- Click

Print Stock Items



On the Report Viewer window toolbar:

- Click **Print** ().
- Click **Close** () to close the Report Viewer window.

Note

This report may have multiple pages. Check the page count on the Report Viewer window toolbar.

Chapter 4: Reports

In this chapter you will learn:

- ✓ Generate a vendor order from a Production Record.
- ✓ Change a vendor order.
- ✓ Place a vendor order.
- ✓ Cancel a vendor order
- ✓ Print stock items from a Production Record.

Reports at a Glance

Menu Function	Description
Production Print Recipes	Displays and prints
Production Reports	

Note: The menus and functions to which you have access are those appropriate for your role with PrimeroEdge. When you access the **Order** menu, you may see a subset of the functions listed above.

Production Print Recipes



Production Print Recipes allows you to:

- View or print a recipe; includes ingredients, preparation instructions and nutrient information per 100g and per serving.
- View or print a **scaled** recipe; recipe can be scaled by the number of batches or by serving size.

 A screenshot of the 'Production Print Recipes' search page. It features a header 'Production Print Recipes' and a section titled 'Recipe Search Criteria'. Below this, there are two input fields: 'Recipe Code' and 'Recipe Name'. To the right of the 'Recipe Name' field is a 'Search' button with a magnifying glass icon.

By default on the *Production Print Recipes* page:

- **Recipe Code** is blank.
- **Recipe Name** is blank.

Page Functions

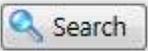
Page Functions	Description
	Click to find all recipes that include the entered Recipe Code or Recipe Name .

Printing a Recipe

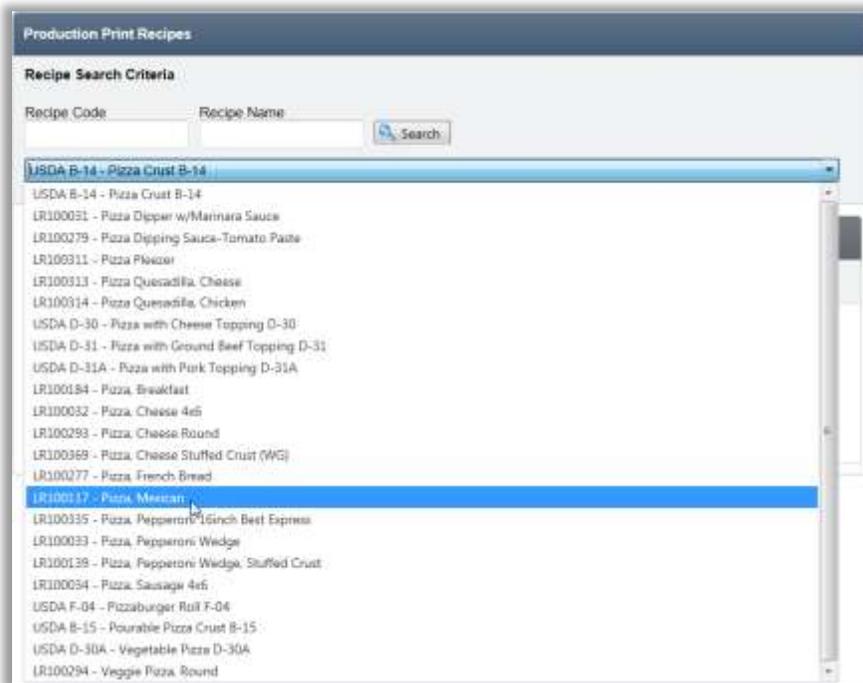
Search for a Recipe



On the *Production Print Recipes* page:

- Do one of the following:
 - In **Recipe Code** enter a complete recipe code, **or**
 - In **Recipe Name**, enter a partial or complete recipe name.
- Click  .

Choose a Recipe

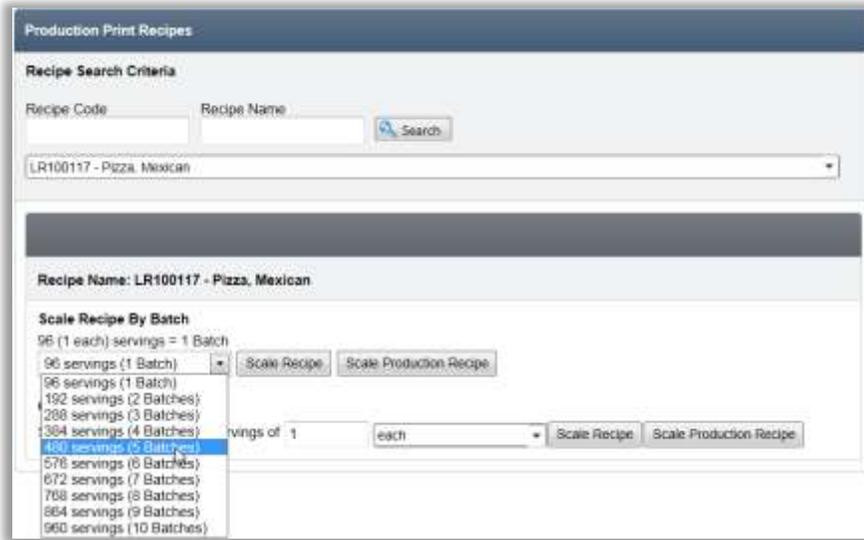


The first recipe that meets the search criteria is listed.

- Click on the drop-down arrow in the list box to display all recipes that meet the search criteria. Click on a different recipe, if needed.

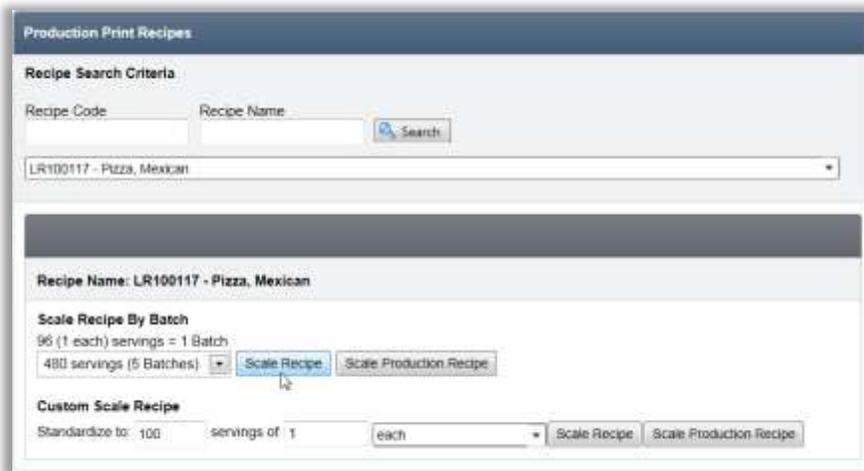
Scale the Recipe

By default, a recipe is scaled by a single batch. However, a recipe can be scaled by the number of servings/batches, or by the number of servings and/or serving size.

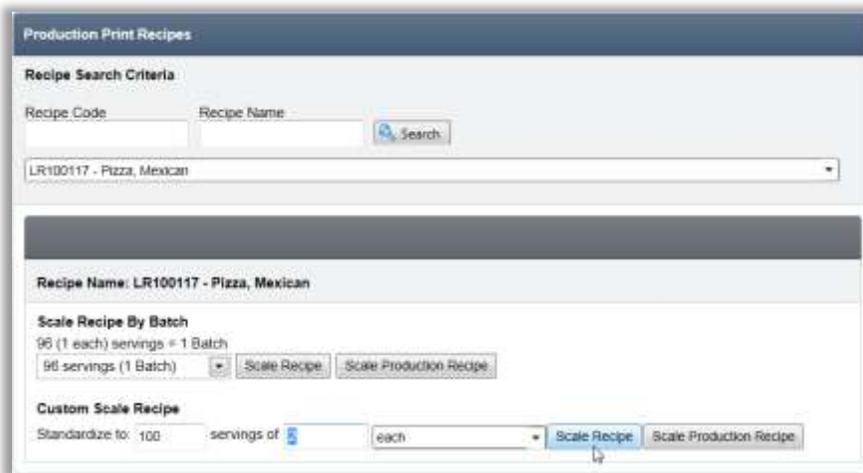


To scale a recipe by batch, in the **Scale Recipe By Batch** group:

- Select the desired number of batches.
-

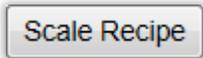


- Click 



To scale a recipe by servings/serving size, in the **Custom Scale Recipe** group:

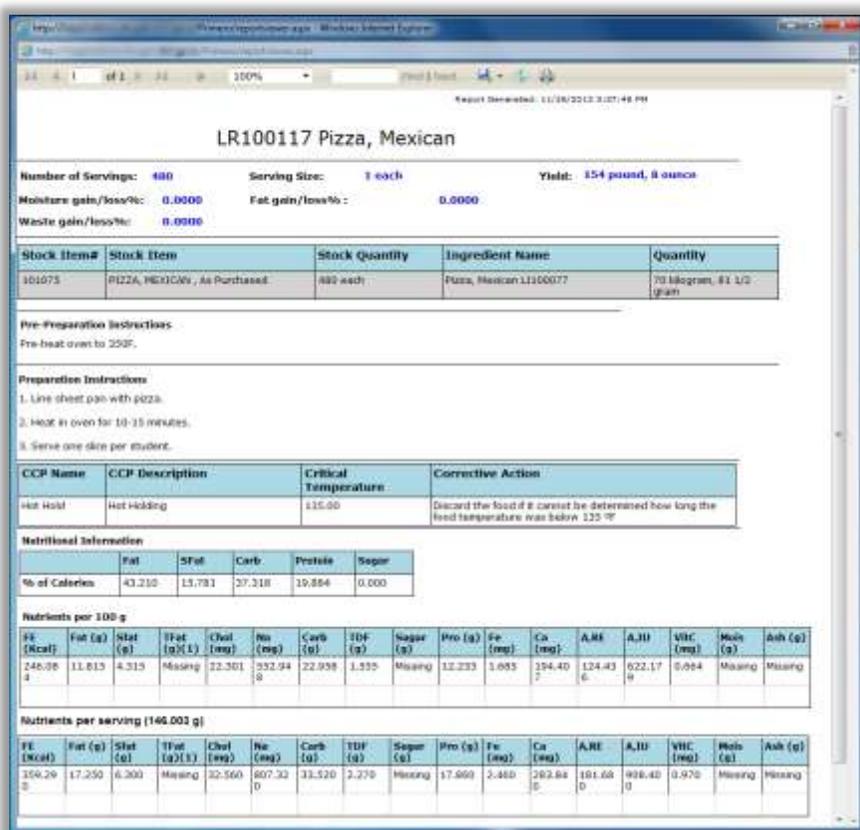
- In **Standardize to:**, enter the number of servings (default = "100").
- In **servings of**, enter the serving amount and select a serving unit.



- Click

View/Print the Recipe

The recipe appears in the print viewer window.



To view the recipe:

- Scroll through the displayed page using the scroll bars or
- Use the page controls to move among the pages, if multiple pages are generated.

LR100117 Pizza, Mexican

Number of Servings: 400 Serving Size: 1 each Yield: 154 pound, 8 ounce

Moisture gain/loss%: 0.0000 Fat gain/loss%: 0.0000

Waste gain/loss%: 0.0000

Stock Item#	Stock Item	Stock Quantity	Ingredient Name	Quantity
101073	PIZZA, MEXICAN , As Purchased	400 each	Pizza, Mexican LR100077	10 kilogram, 61 1/2 gram

Pre-Preparation Instructions
Pre-heat oven to 250F.

Preparation Instructions:
1. Line sheet pan with pizza.
2. Heat in oven for 10-15 minutes.
3. Serve one slice per student.

CCP Name	CCP Description	Critical Temperature	Corrective Action
Hot Hold	Hot Holding	135.00	Discard the food if it cannot be determined how long the food temperature was below 135 °F

Nutritional Information

% of Calories	Fat	Sfat	Chol	Prot	Sugar
43.210	15.781	37.318	19.884	0.000	

Nutrients per 100 g

EE (kcal)	Fat (g)	Sfat (g)	TFat (g)(1)	Chol (mg)	Na (mg)	Carb (g)	TDF (g)	Sugar (g)	Pro (g)	Fe (mg)	Ca (mg)	A,RE	A,BI	VitC (mg)	Mois (g)	Ash (g)
246.08	11.815	4.313	Missing	22.301	552.94	22.958	1.555	Missing	12.233	1.683	194.40	124.43	623.17	0.884	Missing	Missing

Nutrients per serving (146.000 g)

EE (kcal)	Fat (g)	Sfat (g)	TFat (g)(1)	Chol (mg)	Na (mg)	Carb (g)	TDF (g)	Sugar (g)	Pro (g)	Fe (mg)	Ca (mg)	A,RE	A,BI	VitC (mg)	Mois (g)	Ash (g)
359.29	17.250	6.300	Missing	32.540	807.32	33.520	2.270	Missing	17.840	2.480	283.04	181.68	909.40	0.970	Missing	Missing

To print the recipe:

- Click **Print** () on the report viewer toolbar.

LR100117 Pizza, Mexican

Number of Servings: 100 Serving Size: 2 each Yield: 64 pound, 0 ounce

Moisture gain/loss%: 0.0000 Fat gain/loss%: 0.0000

Waste gain/loss%: 0.0000

Stock Item#	Stock Item	Stock Quantity	Ingredient Name	Quantity
101073	PIZZA, MEXICAN , As Purchased	200 each	Pizza, Mexican LR100077	10 kilogram, 200 3/8 gram

Pre-Preparation Instructions
Pre-heat oven to 250F.

Preparation Instructions:
1. Line sheet pan with pizza.
2. Heat in oven for 10-15 minutes.
3. Serve one slice per student.

CCP Name	CCP Description	Critical Temperature	Corrective Action
Hot Hold	Hot Holding	135.00	Discard the food if it cannot be determined how long the food temperature was below 135 °F

Nutritional Information

% of Calories	Fat	Sfat	Chol	Prot	Sugar
43.210	15.781	37.318	19.884	0.000	

Nutrients per 100 g

EE (kcal)	Fat (g)	Sfat (g)	TFat (g)(1)	Chol (mg)	Na (mg)	Carb (g)	TDF (g)	Sugar (g)	Pro (g)	Fe (mg)	Ca (mg)	A,RE	A,BI	VitC (mg)	Mois (g)	Ash (g)
246.08	11.815	4.313	Missing	22.301	552.94	22.958	1.555	Missing	12.233	1.683	194.40	124.43	623.17	0.884	Missing	Missing

Nutrients per serving (292.000 g)

EE (kcal)	Fat (g)	Sfat (g)	TFat (g)(1)	Chol (mg)	Na (mg)	Carb (g)	TDF (g)	Sugar (g)	Pro (g)	Fe (mg)	Ca (mg)	A,RE	A,BI	VitC (mg)	Mois (g)	Ash (g)
718.33	34.300	12.600	Missing	65.120	1014.6	67.040	4.540	Missing	35.720	4.920	387.08	263.26	1016.8	1.940	Missing	Missing

1) Trans Fat is provided for informational purposes, not for marketing purposes.

Page 1 of 1

Note

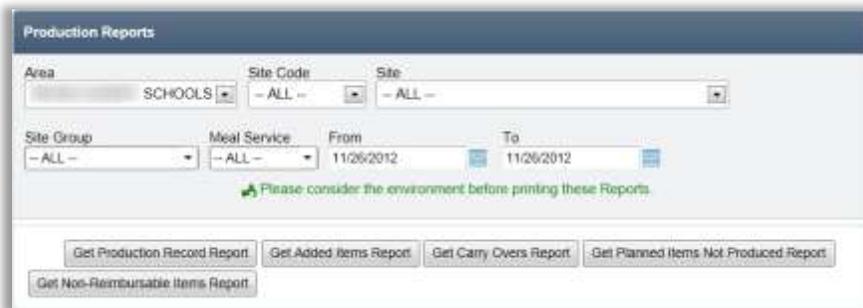
When the serving size is changed, the nutrient information *per serving* is updated to reflect the change.

Production Reports



Production Reports allows you to view or print the following reports:

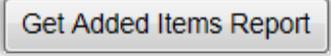
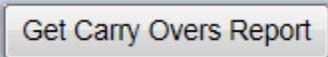
-



By default on the *Production Reports* page:

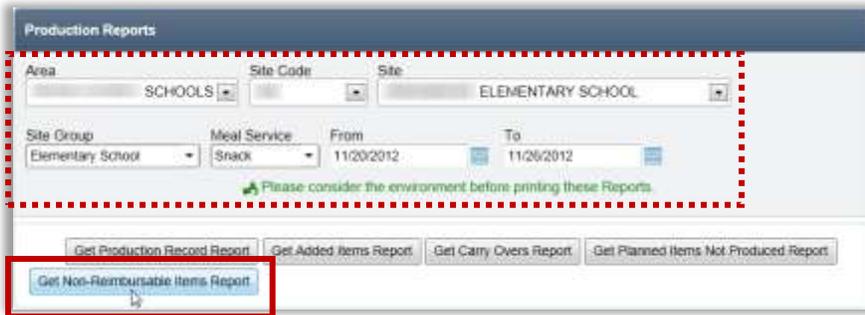
- **Area** is set to your area; if you have access to multiple areas, the first area in the list of available areas is listed.
- **Site Code/Site** are set to your site; if you have access to multiple sites, the first site in the list of available sites is listed.
- **Site Group** is set to "ALL".
- **Meal Service** is set to "ALL".
- **From / To** are set to the current date.

Page Functions

Page Functions	Description
	
	Click to generate a list of all menu items added to a Production Record that were not included in the planned menu(s).
	Click to generate a list of menu items prepared in the selected date range that are being carried over to a future date.

Get Planned Items Not Produced Report	Click to generate a list of menu items that were planned for production on a date/date range but were not produced.
Get Non-Reimbursable Items Report	

Generating a Production Record Report



On the *Production Reports* page:

- Select report criteria/ conditions, as needed.
- Click



Production Record reports can be generated for production records with a status of ■ **Record Complete** and/or ■ **Withdrawal Complete**. Use the table below to read the **Production Record** report data.

Report Field	Description
Column Headers	
Menu Item (Recipe #)	Menu item name and recipe code assigned to the recipe when the recipe was created
Meal Contributions	Menu item contributions to a reimbursable meal
K-8 (Serving Group[s])	Projected servings for each Serving Group (Serving size and unit)
Total Planned	Planned production count of menu item (Serving size and unit)
Servings Produced	Total servings produced (Serving size and unit)
Total Served	Total served of produced menu item (Serving size and unit)
Qty Prepared	
Left Over	Count of menu item remaining after meal service and how the left over is to be handled (serving size and unit)
Comments	Comment text recorded on the Production Plan, if any

http://reportserver.azure - Windows Internet Explorer

of 2 100%

Food | Home

Daily Food Production Record

SCHOOLS

ELEMENTARY SCHOOL

Lunch, Serving Date - Tuesday October 30, 2012

Preparation Site: ELEMENTARY SCHOOL

Offer Vs.Serve: NO

Plan Comments:

Record Comments:

Menu Line: Hamburger bar

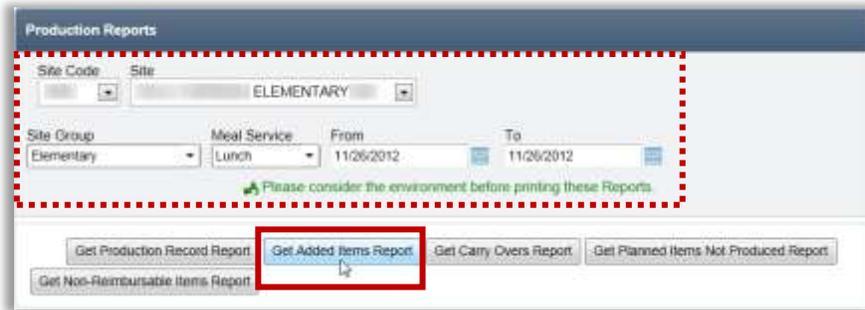
Meal Count	Planned	Actual
K-8	200	200
Total	200	200

Menu Item (Recipe #)	Meal Contribution	K-8	Total Planned	Servings Produced	Total Served	Qty Prepared	Left Over	Comments
Meals (Must Take 1)								
Hamburger w/ Bun (LR100403)	2 WG 1 1/2 Meat/MA	200 (1 ea.)	200 (1 ea.)	200 (1 ea.)	200 (1 ea.)			
Drinks (Must Take 1)								
Low-Fat Milk (LR100077)	1 MILK-F	150 (1 16oz glass)	150 (1 16oz glass)	200 (1 16oz glass)	150 (1 16oz glass)		Return to Stock 50 (1 16oz glass)	
Spring Water (LR100001)		150 (8 fl. oz.)	150 (8 fl. oz.)	150 (8 fl. oz.)	100 (8 fl. oz.)		Return to Stock 50 (8 fl. oz.)	
Salads (Must Take 1)								
Hamburger Vegetables (LR300075)	1/2 Veg-DG 1 Veg-RD	200 (1 ea.)	200 (1 ea.)	200 (1 ea.)	200 (1 ea.)	1/8 Basket (lettuce) 10 tablespoon, 2 2/3 teaspoon (Salad Tomatoes)		
Fruit (Must Take 1)								
Apple, Golden Delicious (LR300076)	1 Fruit	200 (1 CN-grams 1)	200 (1 CN-grams 1)	225 (1 CN-grams 1)	210 (1 CN-grams 1)		Return to Stock 15 (1 CN-grams 1)	

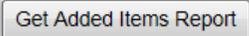
Report Generated On: 11/27/2012 4:16:05 PM

Page 2 of 2

Generating an Added Items Report



On the *Production Reports* page:

- Select report criteria/ conditions, as needed.
- Click 

Use the table below to read the **Items Added to Production Records** report data.

Report Field	Description
Column Headers	
Category	Category assigned to the menu item
Menu Item	Name of the menu item
Serv. Size	Menu item serving amount and unit
Comment	Additional information recorded for the menu item in the Production Record
School Listing Header	
School Code	District assigned site number
School Name	District assigned site name
Date	Date for which data is collected
Meal Service	Meal service name
Site Group	Site Group name
Menu Line	Menu Line name

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http://.../Primero/reportviewer.aspx

Generated On: 11/27/2012 12:20:48 PM

Items Added To Production Records

School System

From : 11/26/2012 To : 11/26/2012

Category	Menu Item	Serv. Size	Comment
MIDDLE - 11/26/2012 - Breakfast - Middle - Regular			
MEAT/MEAT ALT	Yogurt, Strawberry FF-4oz	1 each	
CONDIMENT	Cinnamon Raisin Bagel	1 each	
CONDIMENT	Cream Cheese, Ind	1 each	
CONDIMENT	Plain Bagel	1 each	
ELEMENTARY - 11/26/2012 - Snack - Elementary - Regular			
FRUIT	Gripz-Cinnamon	1 package	
MIDDLE - 11/26/2012 - Lunch - Middle - Regular			
MEAT/MEAT ALT	Chicken Patty Sandwich	1 sandwich	
MEAT/MEAT ALT	Pizza, Pepperoni Wedge	1 serving (1 slice)	
VEGETABLE	Deli Roaster Potatoes	1/2 c.	
VEGETABLE	Seasoned Potato Stix	1/2 c.	
VEGETABLE	Tator Tots	1/2 c.	
FRUIT	Mixed Fruit	1/2 c.	
ELEMENTARY - 11/26/2012 - Lunch - Elementary - Regular			
MEAT/MEAT ALT	Country Steak Fingers	3 each	
VEGETABLE	Mixed Vegetables (Frozen)	1/2 c.	
CONDIMENT	Elem/Middle Sack Lunch-Chicken Sand.	1 ea.	
MIDDLE - 11/26/2012 - Breakfast - Middle - Regular			
MEAT/MEAT ALT	Pancake on a Stick	1 each	
MEAT/MEAT ALT	Steak Biscuit	1 each	
CONDIMENT	Honeybun-Wheat	1 honeybun	
HIGH - 11/26/2012 - Breakfast - High - Regular			
CONDIMENT	Cereal Variety	1 each	
CONDIMENT	Jelly	1 packet (6 oz)	

Generating a Carry Overs Report



On the *Production Reports* page:

- Select report criteria/ conditions, as needed.
- Click Get Carry Overs Report

Report Field	Description
Column Headers	
Category	Category assigned to the menu item
Menu Item	Name of the menu item
Serv. Size	Menu item serving amount and unit
Days	Number of days that the menu item can be carried over to be used on a future date; carry over days are set on the Production Record
On Menu	Yes/No; indicates if the menu assigned to the "To Date" day includes the carried over menu item
Comment	Additional information recorded for the menu item in the Production Record
School Listing Header	
School Code	District assigned site number
School Name	District assigned site name
Date	Date for which data is collected
Meal Service	Meal service name
Site Group	Site Group name
Menu Line	Menu Line name

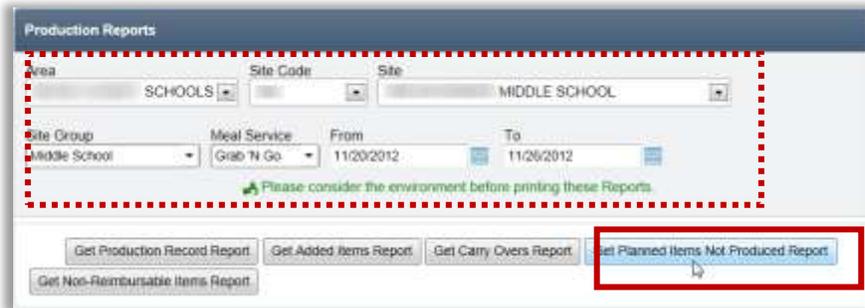
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Carry Overs Report

School System
 From : 11/26/2012 To : 11/26/2012

Category	Menu Item	Amount (Serv. Size)	Days	On Menu	Comment
HIGH - From Date :11/26/2012 - To Date :11/27/2012 - Breakfast - High					
MEAT/MEAT ALT	Chicken Biscuit	38 (1 each)	1	No	
MEAT/MEAT ALT	Sausage Biscuit	40 (1 each)	1	No	
MIDDLE - From Date :11/26/2012 - To Date :11/27/2012 - Lunch - Middle					
MEAT/MEAT ALT	Rice, White Steamed	68 (1/2 c.)	1	No	
MEAT/MEAT ALT	Vegetable Salad w/croutons	32 (1 salad)	1	No	
FRUIT	Applesauce	7 (1/2 c.)	1	No	
FRUIT	Fresh Fruit	76 (1 whole fruit)	1	No	
CONDIMENT	Salad Dressing Variety	32 (2 Tbsp.)	1	No	
MIDDLE - From Date :11/26/2012 - To Date :12/14/2012 - Lunch - Middle					
MEAT/MEAT ALT	Cheeseburger w/USDA patty	14 (1 each)	18	No	
VEGETABLE	French Fries-Straight Cut BAKED	30 (1/2 c.)	18	No	
ELEMENTARY - From Date :11/26/2012 - To Date :12/04/2012 - Breakfast - Elementary					
MEAT/MEAT ALT	Sausage Patty, Pork 1.25oz	20 (1 patty)	8	No	
ELEMENTARY - From Date :11/26/2012 - To Date :12/10/2012 - Breakfast - Elementary					
MEAT/MEAT ALT	Blueberry Muffin	20 (1 muffin)	14	No	
MIDDLE - From Date :11/26/2012 - To Date :11/27/2012 - Breakfast - Middle					
MEAT/MEAT ALT	Cheese Omelet	6 (1 each)	1	No	
MEAT/MEAT ALT	Chicken Biscuit	43 (1 each)	1	No	
MEAT/MEAT ALT	Cinnamon Toast	6 (1 piece)	1	No	
MEAT/MEAT ALT	Sausage Biscuit	66 (1 each)	1	No	
MIDDLE - From Date :11/26/2012 - To Date :11/27/2012 - Lunch - Middle					
MEAT/MEAT ALT	Ham & Cheese Sandwich	3 (1 sandwich)	1	No	
MEAT/MEAT ALT	Rice, White Steamed	150 (1/2 c.)	1	No	
		23 (1/2 c.)			

Generating a Planned Items Not Produced Report



On the *Production Reports* page:

- Select report criteria/ conditions, as needed.
- Click

Get Planned Items Not Produced Report

Use the table below to read the **Planned Items Not Produced** report data.

Report Field	Description
Column Headers	
Category	Category assigned to the menu item
Menu Item	Name of the menu item
Planned (Serv. Size)	Planned production counts of the menu item (menu item serving amount and unit)
Comment	Additional information recorded for the menu item in the Production Record
School Listing Header	
School Code	District assigned site number
School Name	District assigned site name
Date	Date for which data is collected
Meal Service	Meal service name
Site Group	Site Group name
Menu Line	Menu Line name

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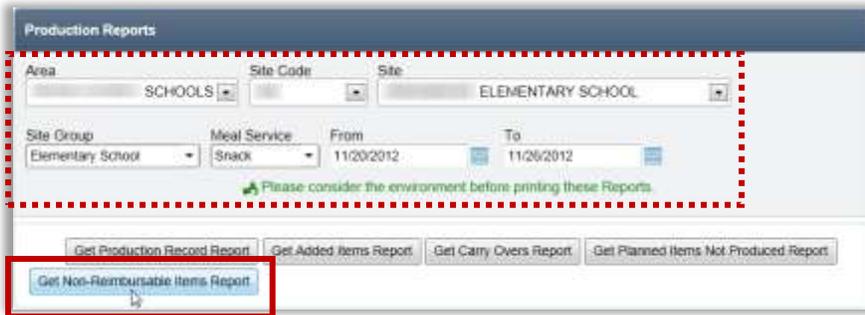
Planned Items Not Produced Report

School System

From : 11/26/2012 To : 11/26/2012

Category	Menu Item	Planned (Serv. Size)	Comment
MIDDLE - 11/26/2012 - Lunch - Middle - Regular			
MEAT/MEAT ALT	Rolls, Breadsticks, Homemade	100 (1 ounce roll)	
ELEMENTARY - 11/26/2012 - Breakfast - Elementary - Regular			
MEAT/MEAT ALT	Cheese Toast	25 (1 each)	
ELEMENTARY - 11/26/2012 - Snack - Elementary - Regular			
MEAT/MEAT ALT	Uncrustable, PBJ 2.8oz	50 (1 each)	
ELEMENTARY - 11/26/2012 - Breakfast - Elementary - Regular			
MILK	Milk, Skim 8oz	2 (1 carton)	
ELEMENTARY - 11/26/2012 - Lunch - Elementary - Regular			
MEAT/MEAT ALT	Rolls, Breadsticks, Homemade	100 (1 ounce roll)	
MEAT/MEAT ALT	Salad-Egg (croutons)	50 (1 salad)	
VEGETABLE	Garden Side Salad	25 (1 c.)	
CONDIMENT	Mustard, Indv Pkts	100 (1 packet)	
CONDIMENT	Salad Dressing Variety	40 (2 Tbsp.)	
HIGH - 11/26/2012 - Breakfast - High - Regular			
MILK	Milk, Skim 8oz	50 (1 carton)	
MILK	Milk, Strawberry Trumoo FF 8oz	50 (1 carton)	
MILK	Milk, Vanilla Trumoo FF 8oz	50 (1 carton)	
HIGH - 11/26/2012 - Lunch - High - Regular			
MEAT/MEAT ALT	Chef Salad w/croutons	12 (1 salad)	
MEAT/MEAT ALT	Vegetable Salad w/croutons	3 (1 salad)	
MEAT/MEAT ALT	Vegetable Wrap	10 (1 ea.)	
ELEMENTARY - 11/26/2012 - Breakfast - Elementary - Regular			
MEAT/MEAT ALT	Sausage Patty, Pork 1.25oz	200 (1 patty)	

Generating a Non-Reimbursable Items Report



On the *Production Reports* page:

- Select report criteria/ conditions, as needed.
- Click

Get Non-Reimbursable Items Report

Use the table below to read the **Planned Items Not Produced** report data.

Report Field	Description
Column Headers	
Recipe #	Recipe code assigned to the recipe when the recipe was created
Menu Item	Name of the menu item
Serv. Size	Menu item serving amount and unit
Quantity Sold	Number of menu item sold on the selected date/date range
Unit Cost	Cost to produce an individual menu item; Unit Cost is calculated with cost data stored in the [Inventory] module.
Purchase Cost	Total of Quantity Sold x Unit Cost

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Non - Reimbursable Items Report

School System

All Sites

From : 11/26/2012 To : 11/26/2012

Recipe #	Menu Item	Serving Size	Quantity Sold	Unit Cost	Purchase Cost
LR100007	Blueberry Muffin	1 muffin	22	\$0.2990	\$6.58
LR100015	Egg & Cheese Biscuit	1 each	1	\$0.3067	\$0.31
LR100021	Cheeseburger w/USDA patty	1 each	36	\$0.5481	\$19.73
LR100039	Milk, Chocolate Trumoo FF 8oz	1 carton	121	\$0.2800	\$33.88
LR100040	Milk, Skim 8oz	1 carton	2	\$0.2700	\$0.54
LR100042	Milk, Vanilla Trumoo FF 8oz	1 carton	1	\$0.2800	\$0.28
LR100058	Chicken Patty Sandwich	1 sandwich	85	\$0.4424	\$37.60
LR100062	Chicken Bites-BAKED	4 oz.	1	\$0.1660	\$0.17
LR100063	Deli Roaster Potatoes	1/2 c.	3	\$0.1863	\$0.56
LR100105	Sliced Turkey & Gravy	2 oz.	1	\$0.2625	\$0.26
LR100133	Beef Tacos	2 tacos	26	\$1.3616	\$35.40
LR100157	Ketchup, Ind Pack	1 each	46	\$0.0086	\$0.40
LR100160	Honey Mustard	1 ounces	1	\$0.0714	\$0.07
LR100295	Garden Burger	1 carton	1	\$0.2800	\$2.24
LR100315	Sweet Potato Stix	1/2 c.	1	\$0.2007	\$0.20
LR100343	Dressing, Ranch Lite Ind	1 oz.	16	\$0.0772	\$1.23
LR100381	Orange Juice, 4oz	1 carton	22	\$0.1370	\$3.01
LR100405	Creole Turkey	3 oz.	2	\$0.3417	\$0.68
					\$161.58

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