INTRODUCTION
MENU SOFTWARE

MENU ENHANCEMENT NUTRITION MODULE

USER'S GUIDE

TEXAS DEPARTMENT OF AGRICULTURE
COMMISSIONER SID MILLER

WHAT IS MENU MODULE?

FAQS

What is MENU Module?

The MENU (Menu Enhancement and Nutrition) Module is a web-based system for menu planning, meal production, nutrition compliance, and meal cost analysis.

Who can use MENU Module?

MENU Module is the perfect tool for district employees responsible for menu planning, meal costing, food production reporting, and more.

What can MENU Module do?

MENU Module can analyze menus for compliance with federal meal requirements, consolidate menu planning and production, streamline administrative reviews (AR), and make marketing to students and parents more successful.

What is PrimeroEdge?

PrimeroEdge is the software vendor for MENU Module. TDA offers Contracting Entities (CE) in Texas PrimeroEdge's school nutrition software (MENU Module) at no cost. Texas makes MENU Module available to CEs via TX-UNPS.

Best Practice: Dedicate at least one person (in addition to you) to help manage MENU Module. You will need the most help when setting up menu cycles for the first time in the MENU Module.

GETTING ACCESS TO MENU MODULE

FAQS

How do I get to MENU Module?

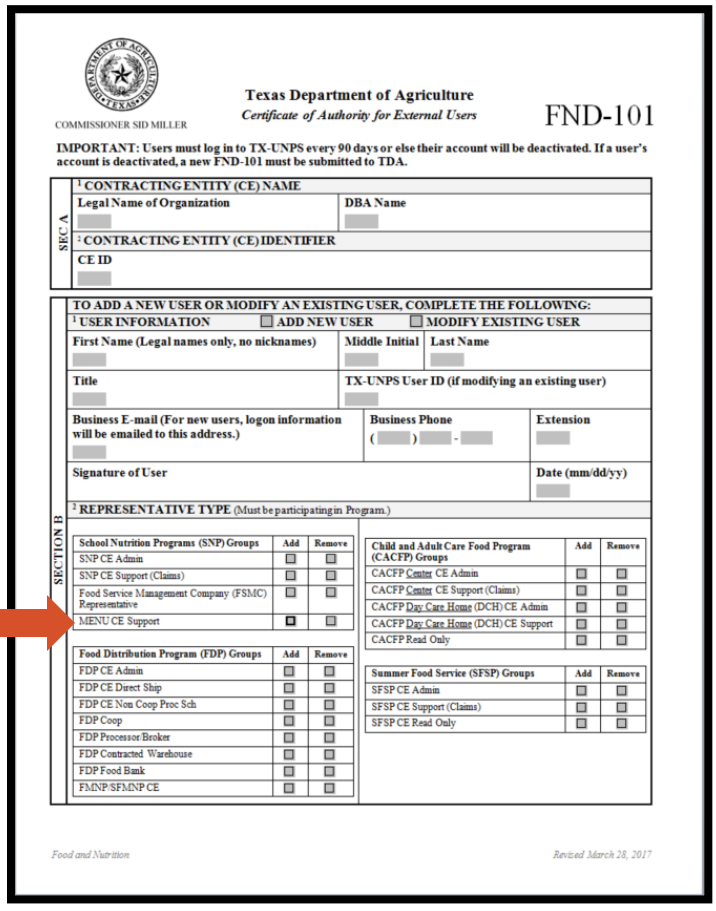
To gain access to MENU Module, submit a completed form FND-101 (found on squaremeals.org) and check the "MENU CE Support" box. You must submit a form FND-101 for MENU Module access. Allow 10-days for FND-101 processing.

Once TDA activates your TX-UNPS account for MENU Module access, you may log in to TX-UNPS and access MENU Module.

Who can use MENU Module?

Any district employee that requests permission for access by submitting an FND-101 can access MENU Module. Child Nutrition Directors may restrict what each user can "see" or "do" by changing system roles and permissions.

Note: Page one of form FND-101 shown.



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Texas Department of Agriculture

Certificate of Authority for External Users

FND-101

IMPORTANT: Users must log in to TX-UNPS every 90 days or else their account will be deactivated. If a user's account is deactivated, a new FND-101 must be submitted to TDA.

SEC A

[1] CONTRACTING ENTITY (CE) NAME

Legal Name of Organization | DBA Name

[2] CONTRACTING ENTITY (CE) IDENTIFIER

CE ID

SECTION B

TO ADD A NEW USER OR MODIFY AN EXISTING USER, COMPLETE THE FOLLOWING:

[1] USER INFORMATION ☐ ADD NEW USER ☐ MODIFY EXISTING USER

First Name (Legal names only, no nicknames) | Middle Initial | Last Name

Title | TX-UNPS User ID (if modifying an existing user)

Business E-mail (For new users, logon information will be emailed to this address.) | Business Phone ( ) - | Extension

Signature of User | Date (mm/dd/yy)

[3] REPRESENTATIVE TYPE (Must be participating in Program.)

School Nutrition Programs (SNP) Groups	Add	Remove
SNP CE Admin	☐	☐
SNP CE Support (Claims)	☐	☐
Food Service Management Company (FSMC) Representative	☐	☐
MENU CE Support	☐	☐

Child and Adult Care Food Program (CACFP) Groups	Add	Remove
CACFP Center CE Admin	☐	☐
CACFP Center CE Support (Claims)	☐	☐
CACFP Day Care Home (DCH) CE Admin	☐	☐
CACFP Day Care Home (DCH) CE Support	☐	☐
CACFP Read Only	☐	☐

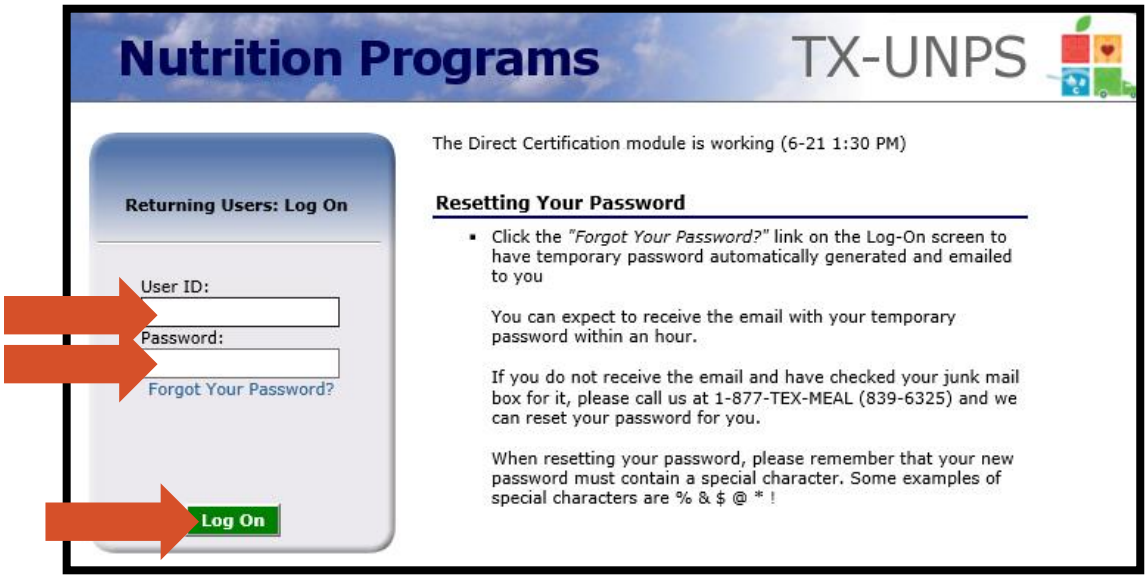
Food Distribution Program (FDP) Groups	Add	Remove
FDP CE Admin	☐	☐
FDP CE Direct Ship	☐	☐
FDP CE Non Coop Proc Sch	☐	☐
FDP Coop	☐	☐
FDP Processor/Broker	☐	☐
FDP Contracted Warehouse	☐	☐
FDP Food Bank	☐	☐
FMNP/SFMNP CE	☐	☐

Summer Food Service (SFSP) Groups	Add	Remove
SFSP CE Admin	☐	☐
SFSP CE Support (Claims)	☐	☐
SFSP CE Read Only	☐	☐

Food and Nutrition *Revised March 28, 2017*

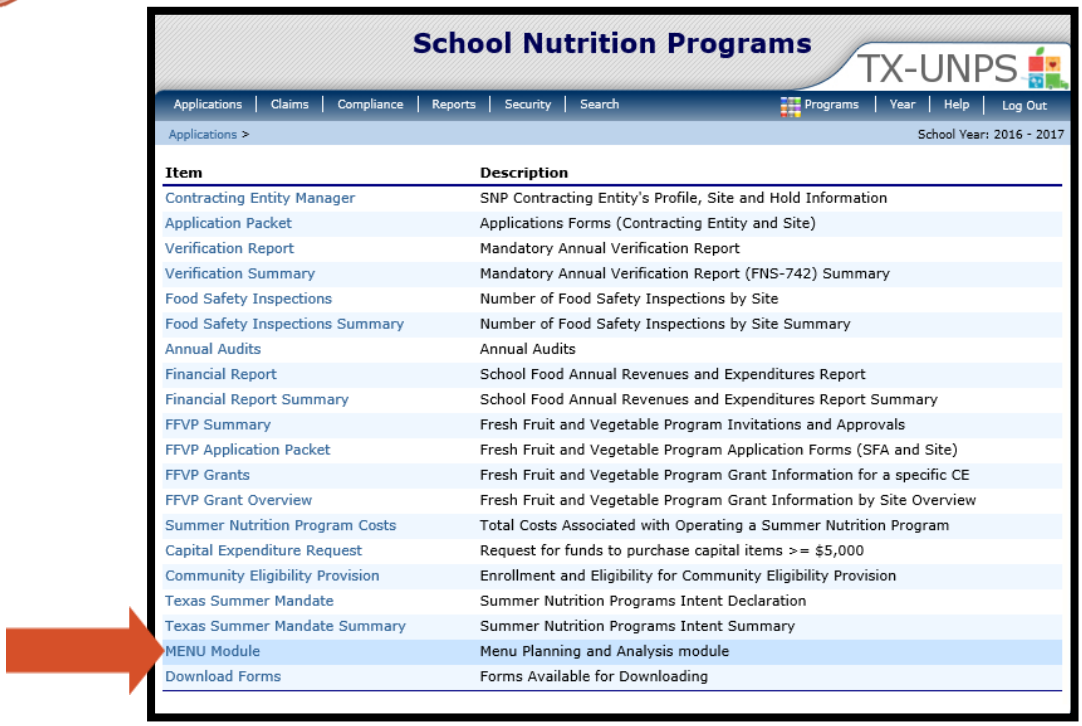
ACCESSING MENU MODULE

1. Log in to MENU Module through TX-UNPS.
   Go to https://txunps1.texasagriculture.gov/txunps/Splash.aspx. Enter your "User ID" and "Password" and click on the "Log On" button.



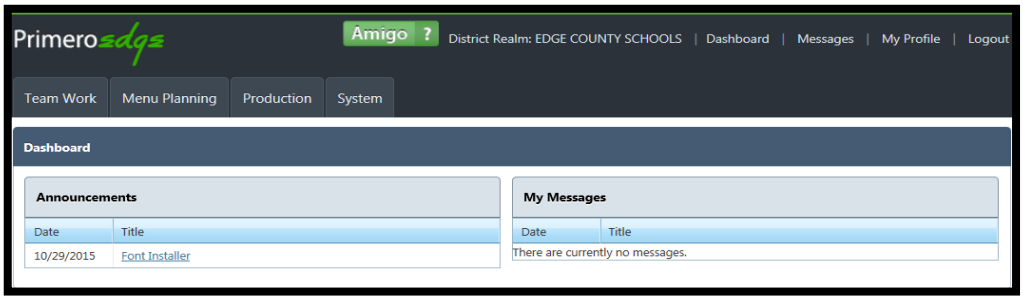
2. Click on the "Applications" link in the upper left hand corner.

3. Click on the "MENU Module" link from the list.



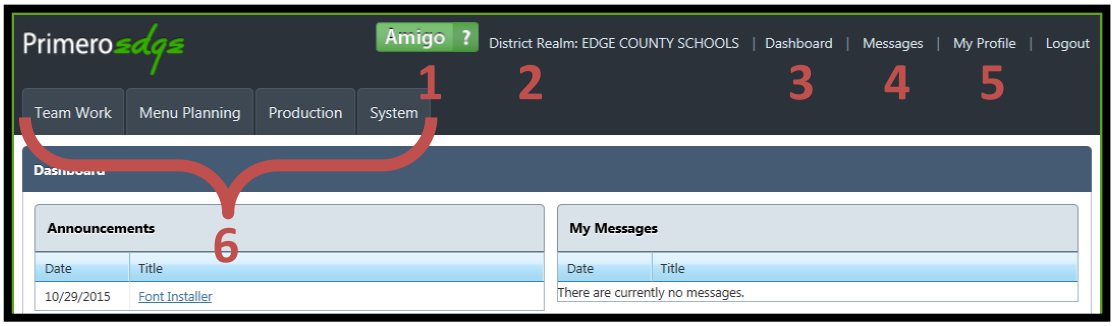
After clicking the "MENU Module" link in TX-UNPS, you will arrive to the MENU Module home page.

The roles and permissions set for you, affect what your home page looks like. For example, users might have access to the "Production" tab but not the "Menu Planning" tab.



QUICK GUIDE: GETTING STARTED IN MENU MODULE

1. **Amigo:** MENU Module comes with a handy help feature called "Amigo." Amigo gives you quick access to Primero Edge's Release Magazines, guides, cards, and manuals (including a system User's Manual), webinars, import templates and more. Type in a help topic and Amigo tells you what to do every step of the way.
2. **District Realm:** The "District Realm" tells you what district you come from.
3. **Dashboard:** The dashboard serves as a communication tool for announcements and messages. Click on the "Dashboard" from anywhere in the system and it will bring you back to your homepage.
4. **Messages:** "Messages" takes you to your message board used for communicating with MENU Module users in your district.
5. **My Profile:** "My Profile" contains your user name, contact information, password options and your "theme" selection that you can used to change the MENU Module color scheme.
6. **Primary tabs:** The primary tabs make up the core functional tabs of MENU Module. You will use these tabs in almost everything that you do in MENU Module.



WELCOME TO AMIGO

1. Click on the green "Amigo" button.
   Amigo displays the "What can I help you with?" pop up box.
2. To search for a help topic, type a help topic into the search bar and click on the magnifying lens button.
3. To access a resource, click on a resource link (in green font).

QUICK GUIDE: AMIGO

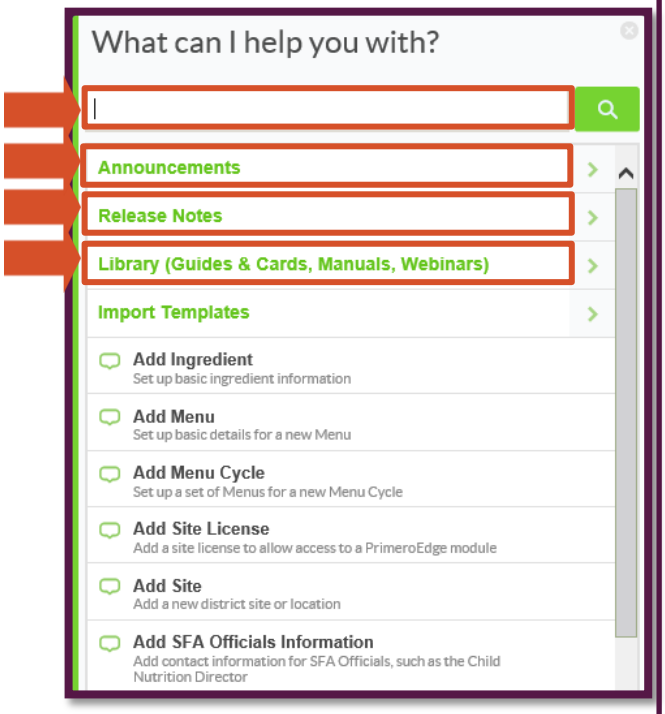
The search bar allows you to type in simple help topics such as "add menu."

"Announcements" link you to news from the software vendor, Primero Edge, highlighting newer information.

"Release Notes" link you to a collection of seasonal Primero Edge magazines. Release magazines highlight software changes.

"Library (Guides & Cards, Manuals, Webinars)" links you to many helpful resources including the "Menu Planning User Manual."

"Import Templates" allow you to import ingredients and all ingredient information.



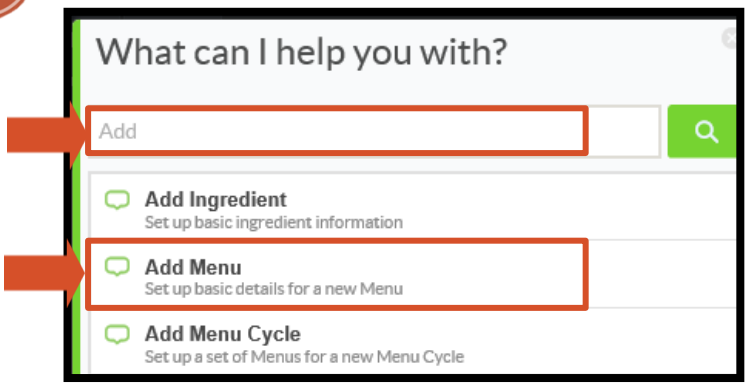
Tip: Keep electronic reference materials open next to MENU Module as you work in the software. This will allow you to reference useful guides when you need help in the software.

EXERCISE: AMIGO

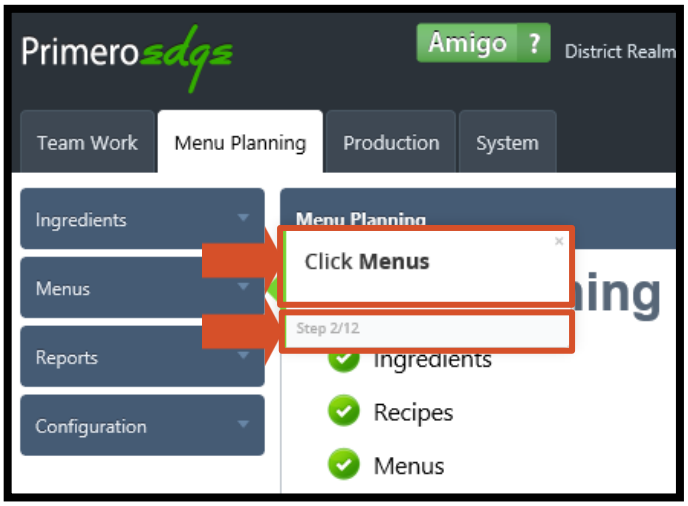
Explore what happens when you type "add menu" into the search bar.

1. **Type the word "add" into the search bar.**
   Amigo displays a list of topics and provides step-by-step instructions on the topic that you select when you click on the topic.

2. **Click on the "Add Menu" topic.**

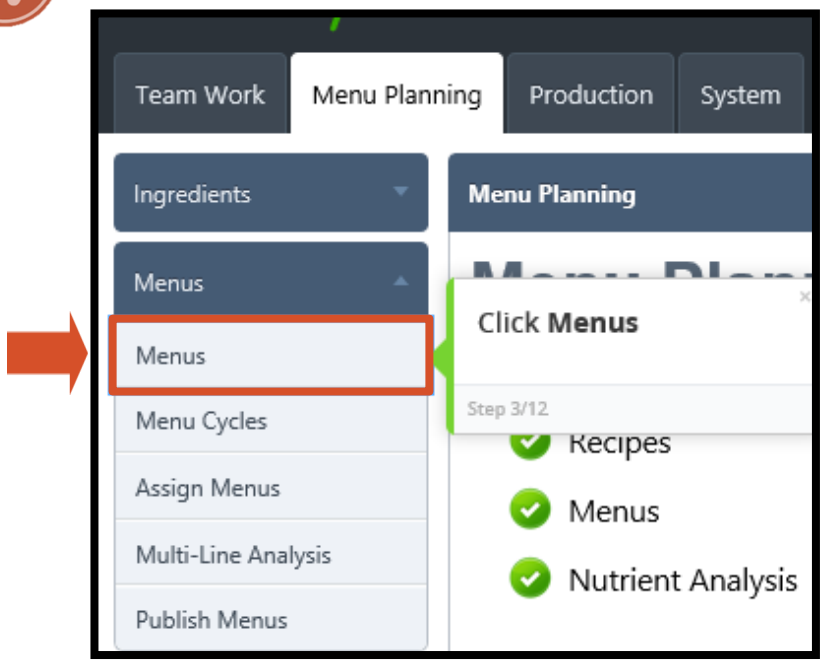


Amigo opens a pop up box that tells you what to do and lists the current step number and the total number of steps.

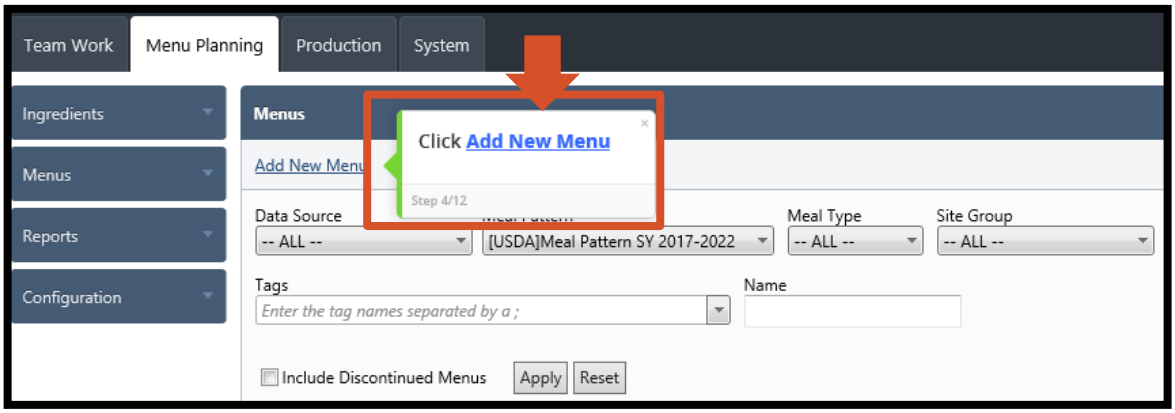


Explore what happens when you follow Amigo's instructions.

3. **Click where indicated, "Menus."**



Amigo automatically tells you the next step. Amigo will continue to walk you through with instructions for all of the steps.



Tip: Amigo is very helpful but cannot help users with all decisions. Different sites and districts may operate differently. Users should use critical thinking skills to help make important decisions in MENU Module.

PRIMARY TABS

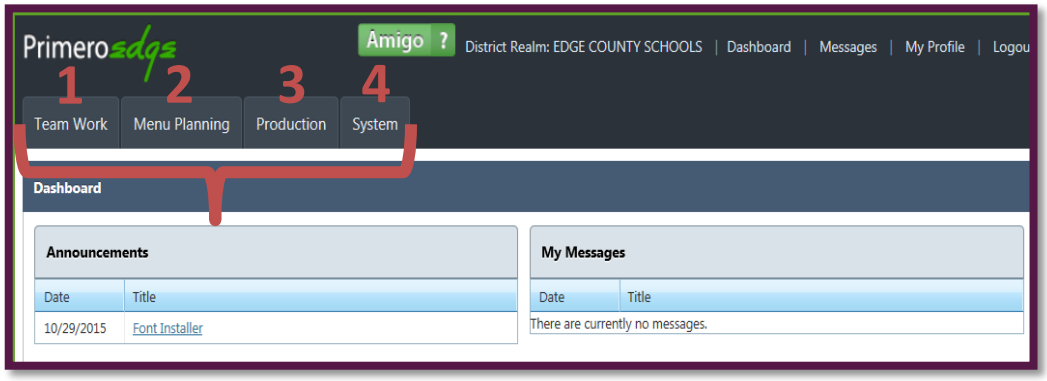
FAQ

What are the primary tabs?

The primary tabs provide access to core functional parts of the MENU Module system. Each tab works to give users access to more specific information. The primary tabs provide access to more specific folders and subfolders. The further users dig, the more specific the information becomes.

QUICK GUIDE: PRIMARY TABS

1. **Teamwork:** The "Teamwork" tab can help you manage employee training and professional standard compliance. This tab is optional and does not affect the core "Menu Planning" and "Production" functions of the system.
2. **Menu Planning:** You will spend the majority of your time in the "Menu Planning" tab. The tab contains everything from ingredients, to menu cycles, reports, and menu-related software setting options.
3. **Production:** The "Production" tab allows you to plan and record production. You can generate technician worksheets, production records, recipes, enter daily production information, and forecast for upcoming daily menus.
4. **System:** The "System" tab allows you to manage software settings such as defining the grade levels at each site, assigning users for MENU Module and selecting user roles and permissions. The "System" tab allows you to do much more, including using import and export functions, and performing management activities.

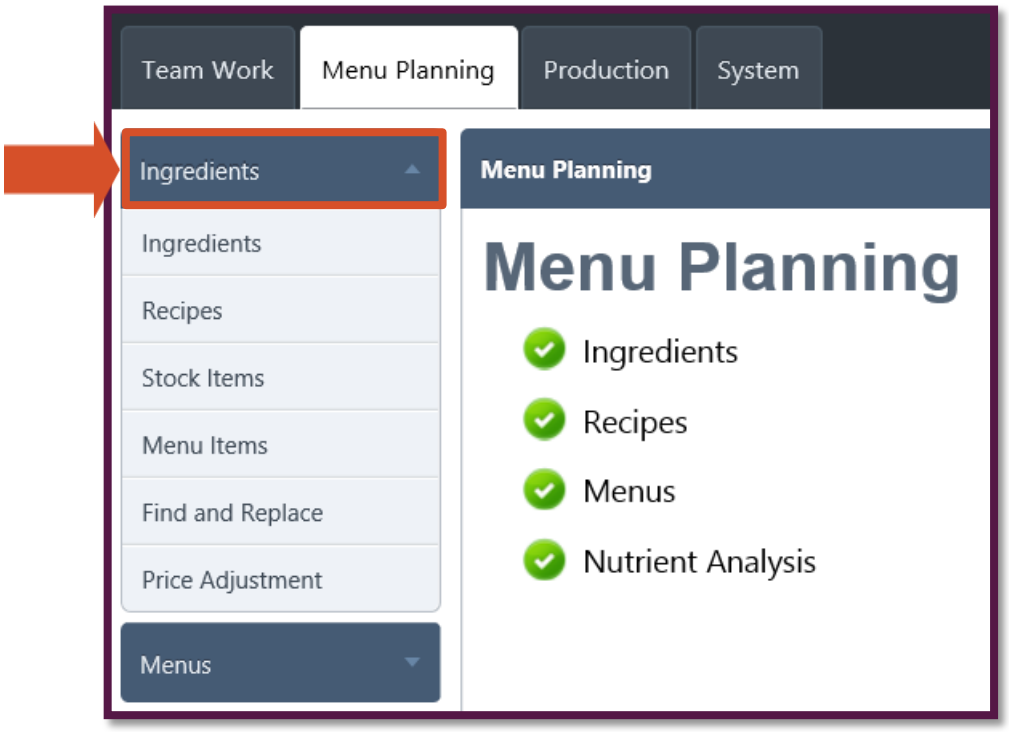


"INGREDIENTS" FOLDER

Explore each folder and the specific information listed under each folder. Start with "Ingredients."

From the "Menu Planning" tab.

1. **Click on the "Ingredients" folder.**



Within the "Ingredients" folder, you see the "Ingredients," "Recipes," "Stock Items," "Menu Items," "Find and Replace," and "Price Adjustment" subfolders.

FAQS

Why are these items listed under the Ingredients folder?

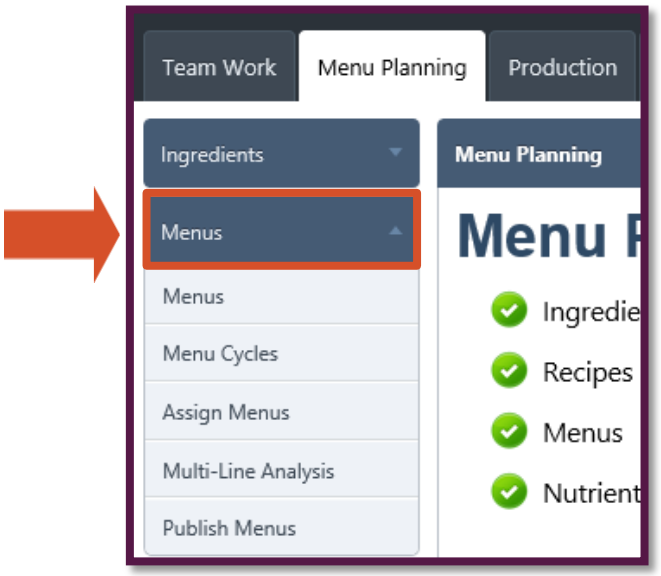
In MENU Module, ingredients build recipes, recipes become menu items, menu items are grouped together to become menus and menus are grouped together to become menu cycles. These items work together and each item builds upon the next item.

"MENUS" FOLDER

Explore the "Menus" folder.

From the "Menu Planning" tab.

1. **Click on the "Menus" folder**



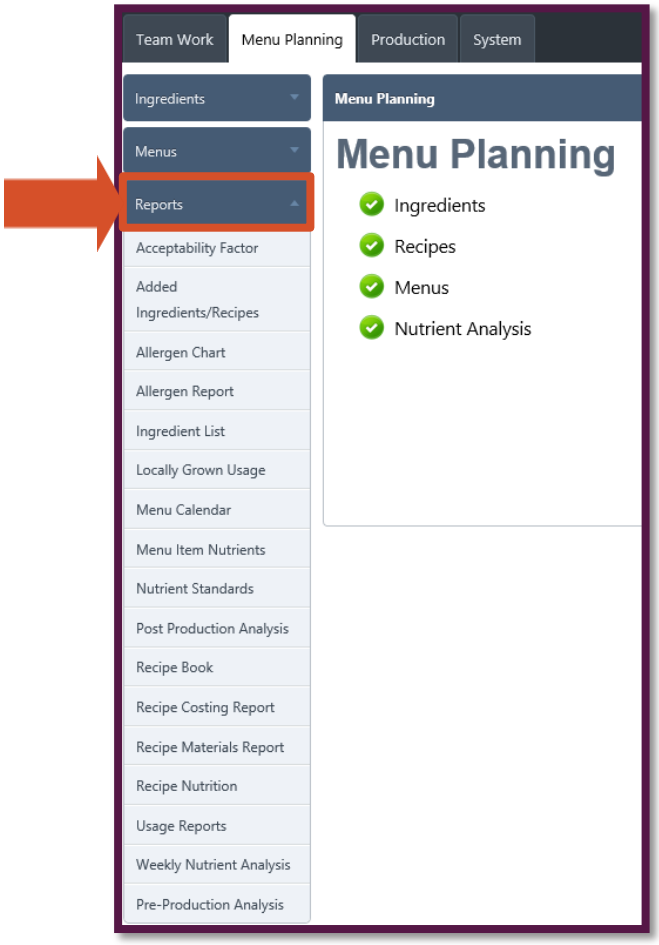
Within the Menus folder, you see the "Menus," "Menu Cycles," "Assign Menus," "Multi-line Analysis," and "Publish Menus" subfolders.

REPORTS FOLDER

Open the "Reports" folder next.

From the "Menu Planning" tab.

1. **Click on the "Reports" folder**



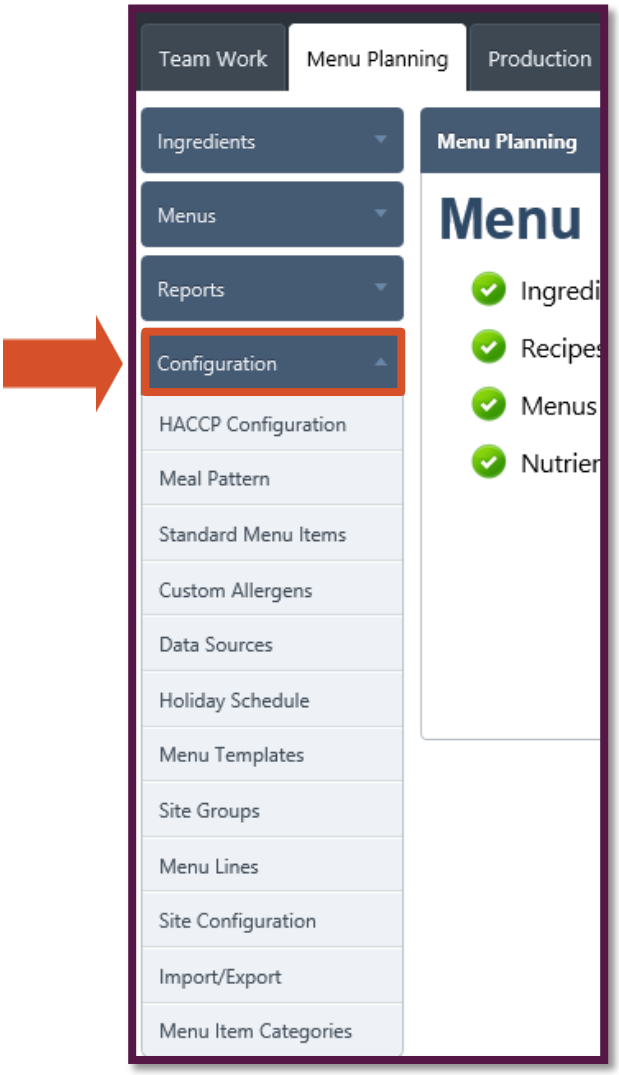
MENU Module can provide many reports, but until you begin using MENU Module and building your menus, your reports may not provide complete information.

CONFIGURATION FOLDER

Explore the Configuration folder.

From the "Menu Planning" tab.

1. **Click on the "Configuration" folder.**



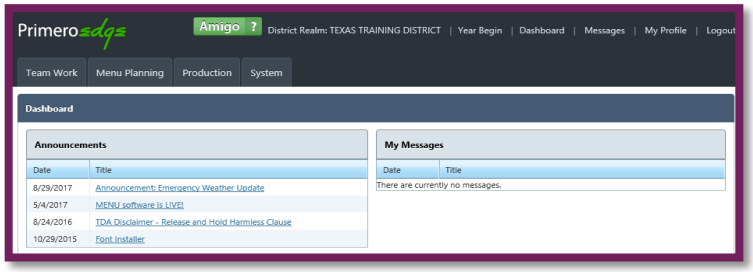
To get the results you want, you need to program the MENU Module system before you begin using it. The folders listed under "Configuration" help you set-up your system for site-level production and produce the reports that you need.

Resource: Explore the *Configuration Helper Tool (found in "Module 2: Configuration" training materials on the MENU Module webpage of SquareMeals.org)* to help you decide what settings you need to configure.

MENU MODULE RESOURCES

PERSONALIZED TECHNICAL ASSISTANCE
- ☐ ESCs

PRIMERO EDGE
- ☐ Learning Resources
  - ○ Amigo
  - ○ Menu Planning User Manual
  - ○ Menu Planning Quick Cards
- ☐ Marketing Materials
  - ○ School Café Flyers and Quick Cards



SQUARE MEALS WEBSITE
- ☐ MENU Module Training Resources
  - ○ User's Guides
  - ○ Cheat Sheets
  - ○ Process Map
  - ○ Tools
  - ○ Training Videos
- ☐ Marketing Materials

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COMMISSIONER SID MILLER

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Office of the Assistant Secretary for Civil Rights

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Washington, D.C. 20250-9410;

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

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