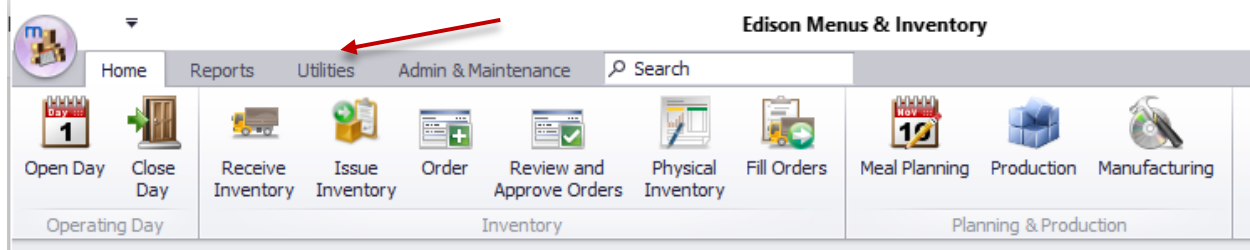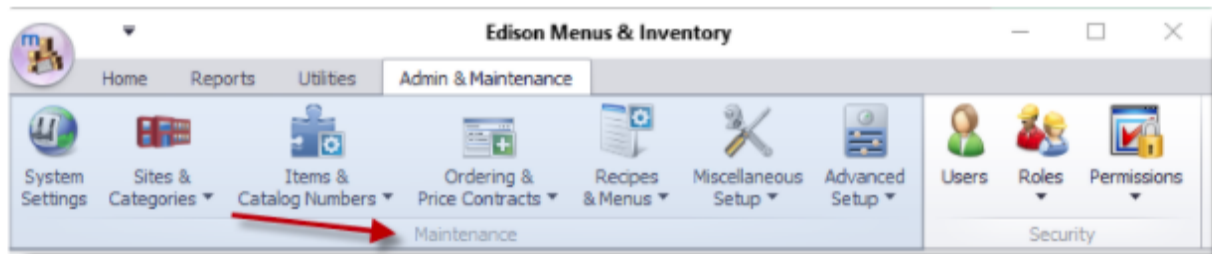# Edison User Guide – Site Managers

Navigation:

Tabs: Located at the top of the ribbon menu for quick navigation between operations within the system.


Ribbon Menu: Consists of icons to allow quick access to tasks and operations. Typically broken down into groups of actions that are performed in sequence.

Search: You'll find a search field at the top of the ribbon menus. Click Search to enable the field, then type a topic to display.
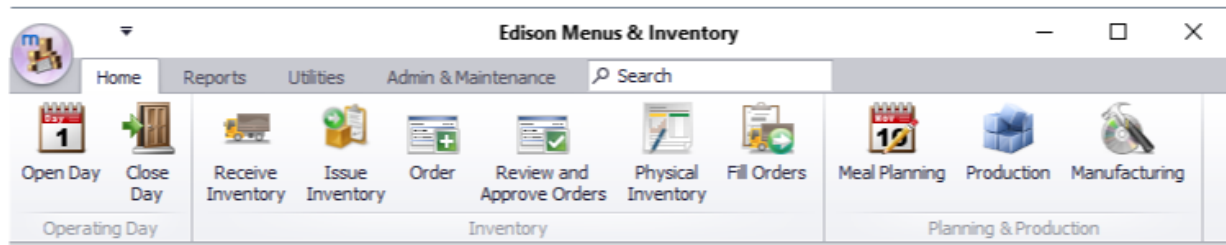

Edison icon: Select the Online User Guide to view a comprehensive website with answers to all of your questions about Edison.
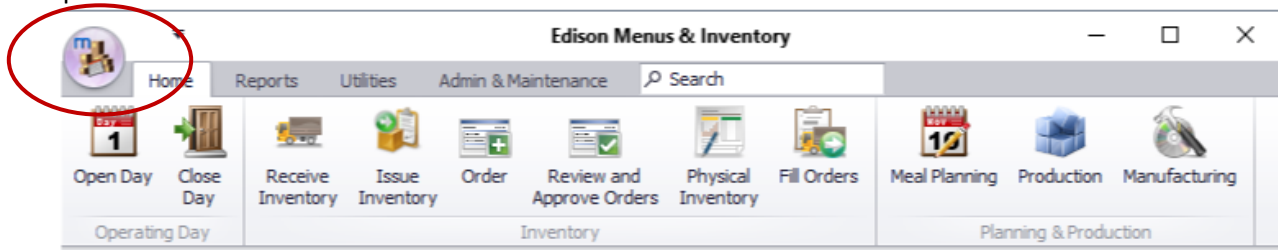
Open Day:

In order to complete daily operations that affect inventory (receiving, production, physical inventory) the date must be open.

- From the **Home tab** or **Checklist**, select **Open Day.**
- Color Legend:
  - ○ White – the day has not yet been opened
  - ○ Green – the day is currently open
  - ○ Red – the day has been closed
- Select a day to open.
- Only **5** days may be open at the same time.
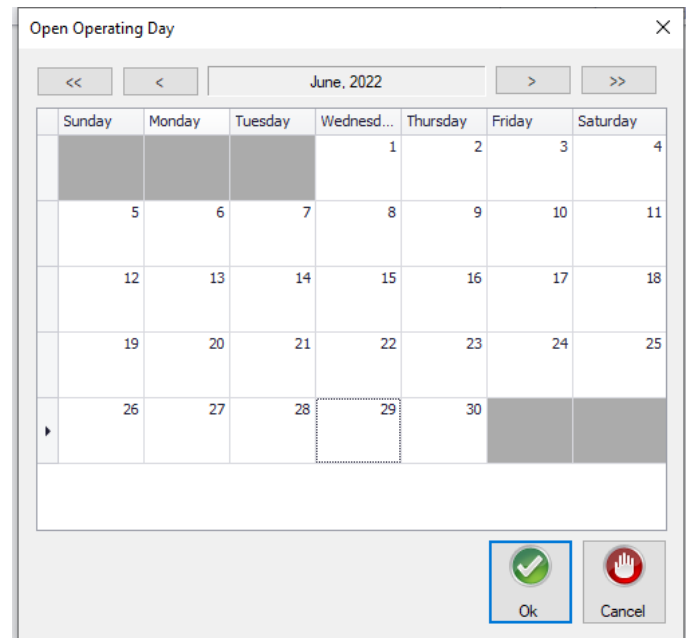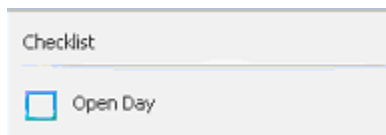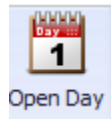
Meal Planning:

- From the **Home** tab or **Checklist**, click on the **Meal Planning** Button.
- **Meal Planning** ribbon options
  - ○ **View** – changes how the calendar looks – click an option once to select it, click it again to deselect it
    - ▪ Include Sunday
    - ▪ Include Saturday
    - ▪ Show Recipe Details
    - ▪ Row Height
  - ○ **Edit Day** – opens the selected (blue) day. Can also double-click a day to open it.
  - ○ **Reset to Template** – Resets the entire selection to the CO template, and resets meal counts to zero.
  - ○ **Automatic Planning** – not using this feature at this time.
  - ○ **Move Planning Dates** – move or swap menus due to service cancellation.
- Select a **Meal Type** from the drop down at the top left of the screen. (Breakfast, Lunch, Supper, etc.)
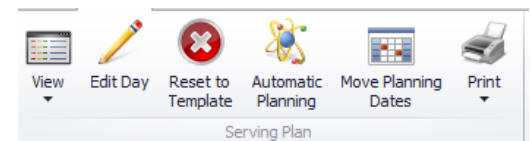
- o **NOTE**: It is always going to default to displaying Lunch
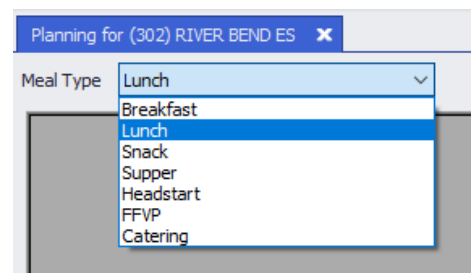
- Color legend:
  - o White – planning has not been started
  - o Green – at least one menu line has been planned
  - o Blue – The current selected day
  - o Yellow – planning is partially complete (if there is more than one menu, only one of the green menu lines has numbers in it)
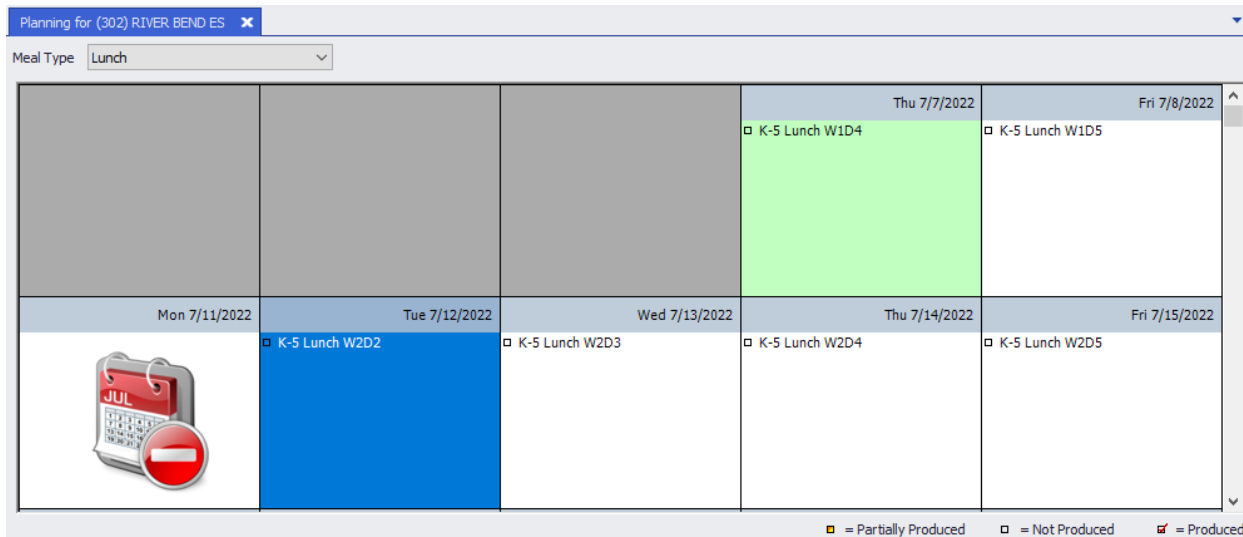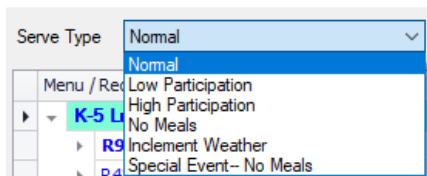

- Double click a day to open the **Serving Plan.**
  - o **Serve Type**
    - ▪ **Normal** – default option, for everyday use
    - ▪ Use other **Serve Types** when directed by the Central Office
      - For Year Round sites, for the dates the site is tracked out, open the **Serving Plan**, highlight the top **Meals Planned** line, click the **Remove** button at the bottom of the screen, and then select **No Meals** from the **Serve Type** drop down menu. Click **OK** to save the changes. Repeat this step for all menus for the tracked out date range.
      - If the menu needs to be restored to a date for whatever reason, highlight the calendar day and click **Reset to Template**. Click **Yes** to confirm. The original menu will now be displayed on the day, and the **Serve Date** will be changed to

- **Meals Planned** - The projected feeding figures for each menu count type (PK-05, 6-12, Adult, etc.) on the **Meals Planned** line item is calculated using the numbers entered into the "entrée" recipes.
- **Servings Planned** - Enter the estimated planned servings for students, adults, and a la carte for each recipe in the **Servings Planned** fields. These counts will be used towards determining which items need to be ordered. **Entrée** recipes are displayed in bold for ease of identification.
  - o **Enter 0 for any menu items that will not be served, do not remove the recipe from the menu.**

- **Daily Alert** – if the Central Office has added an alert to a menu, the icon will display a blinking red exclamation point. Click the icon to view the message.
- **Adding a recipe to the Serving Plan**
  - o Click the **Add** button.
  - o Click **OK** to add a recipe to the current menu
  - o Use the **Search** box to locate and select one or more recipes – search by word or recipe number
  - o Place check marks next to the recipes to be added
  - o Click **OK**

| Menu / Recipe #	Menu / Recipe Description	Count Type	Menu Category / Item Type	Offer vs Serve	PK-05	Adult	A la Carte
K-5 Lunch W2D2	K-5 Lunch W2D2	Meals Planned	Reimbursable Meal	☑	0	0	0
R95070A	Beef for Nachos wth Shredded Cheese	Servings Planned	Entree	☐	0	0	0
R42127	Tortilla Chips, 2 oz	Servings Planned	Other	☐	0	0	0
R48226D	Ranch Style Pinto Beans	Servings Planned	Side Dish	☐	0	0	0
R48404	Salsa, Canned	Servings Planned	Side Dish	☐	0	0	0
R45570C	Chef Salad with Eggs & Cheese	Servings Planned	Entree	☐	0	0	0
R45570A	Chef Salad with Chicken & Cheese	Servings Planned	Entree	☐	0	0	0
R45570B	Chef Salad with Cheddar Cheese	Servings Planned	Entree	☐	0	0	0
R45576B41	Spinach Salad with Chicken & Egg	Servings Planned	Entree	☐	0	0	0
R43303A	Vanilla Yogurt & Peach Parfait	Servings Planned	Entree	☐	0	0	0
R43303B	Vanilla Yogurt & Strawberry Parfait	Servings Planned	Entree	☐	0	0	0
R43800	Tuna Salad on Whole Wheat	Servings Planned	Entree	☐	0	0	0
R48045	MIxed Fruit, Canned	Servings Planned	Side Dish	☐	0	0	0
R48051	Diced Peaches, Canned	Servings Planned	Side Dish	☐	0	0	0
R48061	Diced Pears, Canned	Servings Planned	Side Dish	☐	0	0	0
R48017	Apple Sauce, Cups	Servings Planned	Side Dish	☐	0	0	0
R48049	Diced Peach Cup	Servings Planned	Side Dish	☐	0	0	0
R45505	Fresh Apple Slices, Sweet	Servings Planned	Side Dish	☐	0	0	0
R45510	Fresh Apple Slices, Tart	Servings Planned	Side Dish	☐	0	0	0
R45515	Fresh Banana, Quad Green Tip	Servings Planned	Side Dish	☐	0	0	0
R45522	Fresh Banana, Standard Green Tip	Servings Planned	Side Dish	☐	0	0	0
R45637	Fresh Orange	Servings Planned	Side Dish	☐	0	0	0
R44430	Fat Free Milk, Unflavored	Servings Planned	Milk	☐	0	0	0
R44400	Fat Free Milk, Chocolate	Servings Planned	Milk	☐	0	0	0
R56360	BBQ Sauce Pack	Servings Planned	Condiment	☐	0	0	0

Ordering:

- **Creating a New Order**
  - o From the **Home** tab or **Checklist**, click on the **Order** Button
  - o Click **Create New Order**
  - o Click **Next** on the wizard
  - o **Select Ordering Group** - Select the appropriate **Ordering Group**
  - o Click **Next**
  - o **Requested Delivery Date**
    - ▪ The system is set up to show the next available delivery date relative to today, based on your specific school.
    - ▪ Verify that the **Requested Delivery Date** is correct. Change if necessary.
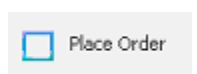
Create New Order

Requested Delivery Date
Select the date you would like to have your orde
determining which price contract to use.

Requested Delivery Date / Price Contract Date
7/13/2022

- o Click **Next**
- o **Automatic Ordering**
  - ▪ If set, it means this ordering group is going to consider what planned servings were entered on your **Serving Plans** for the given date range. Verify that the date range in the **Items needed for planned meals between** field and the **Meal Types** are accurate
  - ▪ If not set, it means this ordering group is not going to consider any planned servings.
  - ▪ This setting is controlled by the Central Office and does not need to be modified.

Create New Order   ×

Automatic Ordering
Select how you would like to automatically estimate your ordering needs

☐ Items below par-order levels

☑ Items needed for planned meals between   Meal Types

7/18/2022   and   7/22/2022   All Meals

☐ Items ordered to be filled from this site for delivery dates between

7/18/2022   and   7/31/2022

☐ Items needed for predicted orders from all sites based on planned meals between

7/18/2022   and   7/22/2022

                                        < Back   Next >   Cancel

- o Click **Next**
- o Click **Finish** to create the order
- o Review the generated order
  - ▪ For automatic ordering orders
    - ● The items at the top of the screen that show quantities are ingredients Edison has determined are needed for the recipes on the menus. **Quantities are calculated based on what is currently in inventory, what is coming in future orders, what is marked for use in other menus, and what planned servings are on this week's menus**

Order Worksheet Information

| | Requested Delivery Date | 7/13/2022 | Ordering Group | Sysco Food - |
| | Price Contract Date | 7/13/2022 | Automatic Ordering | meal planning |

|	Quantity	Unit Description	Catalog Number	Item Description
▶	1 cs / 0	48/Each	55029	Calzone, Pepperoni & Cheese
	1 cs / 0	6/5 LB Bag	49063	Potatoes, French Fries, Crinkle Cut
	1 cs / 0	12/12 CT Bag	40032	Eggs, Whole, Hard Boiled
	1 cs / 0	106/3 oz	53200	Chicken, Patty, Breast w/ Rib, Breaded
	3 cs / 0	6/64 OZ Bag	44050	Yogurt Pouch, LF, Vanilla
	1 cs / 0	4/50 OZ Bag	43303	Cereal, Granola, Bulk, WG

- ● Items with pink 0 quantities mean the items do not need to be ordered
  - ▪ For orders not using automatic ordering
    - ● All quantities will be 0
- o Make adjustments to quantities as needed
  - ▪ Click on any of the column headers to sort by that column if needed
  - ▪ Click the **Filter** icon within a column header to search for or filter items
  - ▪ **NOTE: Enter quantities for items not included in menu items, such as a la carte and non-food as needed.**
  - ▪ To add an item not already listed on the order
    - ● Click the **Add Item** button
    - ● Only items available to add will be listed
    - ● Place a check mark next to the item and click **OK**
    - ● The newly added item will appear at the bottom of the order screen
    - ● Enter the quantity needed for the item

Pick Ordering-List Item

Search for Ordering-List Item

Search   cereal

		Catalog Number	Description ▲	Unit Size
▶	☐	40365	Cereal, Blueberry Chex, 1 OEG	96/1 oz
	☐	40382	Cereal, Blueberry Chex, 2 OEG	60/2 oz
	☐	40360	Cereal, Cheerios, 1 OEG	96/1 oz
	☐	40350	Cereal, Cinnamon Chex, 1 OEG	96/1 oz

  - ▪ **Allow Broken Cases**
    - ● For items where there is a / included, such as "1 cs/0", the full case quantity is to the left of the / and the split case quantity is to the right of the /.

- To order partial cases for items where **Allow Broken Case** is checked, enter a number to the right of the /.
  - The total **Case Count** for the order is displayed at the bottom of the screen
- **View Worksheet**
  - If there are issues with the order, the **View Worksheet** icon in the **Action** ribbon will be blinking red
    - Click the **View Worksheet** icon
   - Select "**Include details of all items with problems**" and then click **OK**
    - Items that show "**Catalog number not available for order**" means the item is not on a price contract and cannot be ordered. Contact the Central Office for assistance.
    - Close the worksheet
- **Order Action** Ribbon
  - **Save Changes** – puts the order in an "Incomplete" status
  - **Save Changes and Complete Order** – submits the order. Click Yes if the "Automatic Ordering" warning appears. **Make sure the order is correct, there is no way to edit orders after clicking this button!**
  - **Cancel Changes** – deletes orders that have not yet been saved, and saves new changes made to orders that were previously saved
  - **Comments** – add a comment to the order that can be viewed by the Central Office. Click the "**Show to Vendor**" checkbox if necessary.
  - **Print** – print available reports as needed
- **Editing an Existing Saved/Incomplete Order**
  - From the **Home** tab, click on the **Order** Button
  - Double click on the order record OR highlight the order and click **Edit Order** from the **Action** ribbon
  - Make the necessary changes
  - Click **Save** to just save the changes OR if the order is ready to be submitted, click **Save Changes and Complete Order**
- **Deleting an Existing Saved/Incomplete Order**
  - From the **Home** tab, click on the **Order** Button
  - Highlight the order record
  - Click **Delete Order** in the **Action** ribbon
  - Enter a comment about why the order is being deleted, click **OK**
- **Reviewing Submitted Orders**
  - From the **Home** tab, click on the **Review and Approve Orders** button.
  - Use the filters within the **Order Status** section of the **Action** ribbon to search for open, submitted orders.
  - Click the **Show Closed Orders** button in the **Orders Action** ribbon to display closed orders.
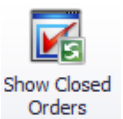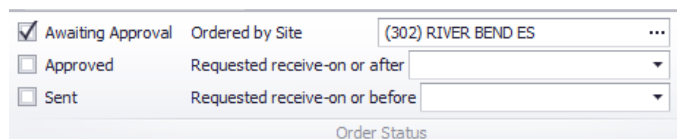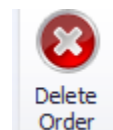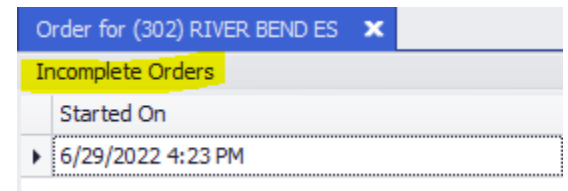
Receiving:

- **Receiving an Order from a Vendor**
  - From the **Home** tab or **Checklist**, click **Receive Inventory** button
  - Click the **Add New Receiving** button
  - Click **Next** in the wizard
  - **What are you receiving**? – select "Order that has been delivered by a vendor"
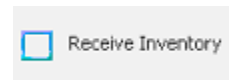
  Begin Receiving

  What are you receiving?
  Select one of the following receiving types

  - ⦿ Order that has been delivered by a vendor
  - ○ Items that have been transferred from a warehouse or other site
  - ○ Items received from a price-contract / purchase-order

  - Click **Next**
  - **Receive Order** – highlight the order to be received

  Begin Receiving

  Receive Order
  Please select which order you are receiving

ID	Delivery Date	From Vendor	Ordering Group
▶ 1005	7/13/2022	Foster Caviness	Foster Wednesday

  - Click **Next**
  - **Date Received** - this should be the date the goods are delivered to the site
  - Enter **Invoice Number -** exactly how it looks on the vendor's invoice
  - **Enter Purchased Total - this will be the total on the vendor's invoice**
  - For each line item:
    - Verify the **Quantity** received
      - If the quantity delivered is different from the **Quantity** listed on the **Receiving** screen, adjust the quantity to match what was delivered.
      - Items where the **Quantity Received** was adjusted will appear in orange.
      - If an item was not delivered, highlight the item and click the **Remove** Item button from the Items **Action** ribbon.
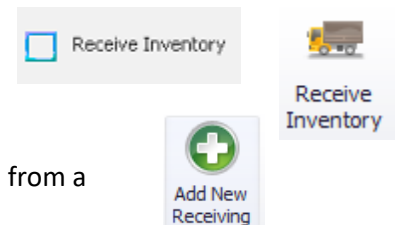   - Verify the **items** received

- If a substituted item was delivered and the new item is already on the order, adjust the delivered item's quantity as needed, then highlight the item that was not delivered and click the **Remove** Item button from the Items **Action** ribbon.
- If a substituted item or an additional item was delivered and the item is not on the order, click the **Add Item from List** button in the **Items Action** ribbon. **Search** for and select the delivered item. It will appear at the bottom of the order. Enter the delivered quantity.
    - o For each line item, place a checkmark in the **Checked** box once data is verified OR click the **Check All** button on the Items **Action** ribbon
    - o Click **Save Changes** to finish the receiving process for the order

Receiving Information										
Receiving ID	(new)			To Site	(302) RIVER BEND ES					
Date Received	Wednesday, June 29, 2022			From Site	Foster Caviness					

Invoice

Invoice Number							Delivery Agent	(n/a)		
Purchased Total	0.00						Delivery Fee	0.00		
Sales Tax	0.00						Storage Fee	0.00		
Donated Total	0.00									

Checked	Quantity Received	Quantity Expected	Unit Description	Partial Unit	Catalog Number	Item Description	Brand	Purchased Price / Case	Purchased Total	Inve
☐	10 cs / 0	10 cs / 0	138/Each		45502	Apple, Fresh, Golden Delicious	Produce	$41.3000	$413.0000	(new
☐	5 cs / 0	5 cs / 0	138/Each		45504	Apple, Fresh, Gala	Produce	$42.9200	$214.6000	(new
☐	8 cs / 0	8 cs / 0	100/Each		45505	Apple Slices, Fresh, Sweet Red	Produce	$27.8000	$222.4000	(new
☐	3 cs / 0	3 cs / 0	138/Each		45507	Apple, Fresh, Red Delicious	Produce	$42.2000	$126.6000	(new
☐	3 cs / 0	3 cs / 0	138/Each		45508	Apple, Fresh, Fuji	Produce	$42.8000	$128.4000	(new

$1,105.0000

- **Receiving an Order from the Warehouse**
    - o From the **Home** tab, click on the **Receive Inventory** button
    - o Click the **Add New Receiving** button
    - o Click **Next** in the wizard
    - o **What are you receiving**? – Items that have been transferred from a warehouse or other site

Begin Receiving

What are you receiving?
Select one of the following receiving types

○ Order that has been delivered by a vendor
◉ Items that have been transferred from a warehouse or other site
○ Items received from a price-contract / purchase-order

- ○ Click **Next**
- ○ **Receive Order** – highlight the order to be received

Begin Receiving   ×

Receive Transfer
Please select the transfer ticket that you are receiving

	ID	Date Issued	Transferred From Site	Order #	Ordering Group	Requested Delivery Date
▶	2	6/29/2022	(140) CNS Warehouse	1008	WH Food - Tue	7/12/2022

- ○ Click **Next**
- ○ **Date Received** - this should be the date of actual delivery
- ○ For each line item:
    - ▪ Verify the **Quantity** received
        - ● If the quantity delivered is different from the **Quantity** listed on the **Receiving** screen, adjust the quantity to match what was delivered.
        - ● Items where the **Quantity Received** was adjusted will appear in orange.
        - ● If an item was not delivered, highlight the item and click the **Remove** Item button from the Items **Action** ribbon.
    - ▪ Verify the **items** received
        - ● If a substituted item was delivered and the new item is already on the order, adjust the delivered item's quantity as needed, then highlight the item that was not delivered and click the **Remove** Item button from the Items **Action** ribbon.
        - ● If a substituted item or an additional item was delivered and the item is not on the order, click the Add Item from List button in the **Items Action** ribbon. **Search** for and select the delivered item. It will appear at the bottom of the order. Enter the delivered quantity.
- ○ For each line item, place a checkmark in the **Checked** box once data is verified Click **Save Changes** to finish the receiving process for the order.

Receiving Information										
Receiving ID	(new)			To Site	(302) RIVER BEND ES					
Date Received	Wednesday, June 29, 2022			From Site	(140) CNS Warehouse					

	Checked	Quantity Received	Quantity Expected	Unit Description	Partial Unit	Catalog Number	Item Description	Brand	Purchased Total	I
▶	☐	2 cs / 0	2 cs / 0	12/2 LB Bag	Lbs/Oz	49010	Broccoli Florets, Frozen	Unknown	$53.8600	0
	☐	5 cs / 0	5 cs / 0	144/1.3 oz		40168	Pancakes, WG	Bake Crafters	$104.9000	0
	☐	4 cs / 0	4 cs / 0	20/LB Bag	Lbs/Oz	53205	Chicken, Popcorn, Brst, WG	Unknown	$149.0000	0
	☐	4 cs / 0	4 cs / 0	8/5 LB	Lbs/Oz	53084	Turkey Breast, Deli, Smoked, Sliced	USDA	$669.7200	0

$977.4800

- **Receiving Delivery (No Order Exists)**
  - From the **Home** tab or **Checklist**, click on the **Receive Inventory** button
  - Click the **Add New Receiving** button
  - Click **Next** in the wizard
  - **What are you receiving**? – select the type of order to receive
    - Items received from a price contract/purchase order
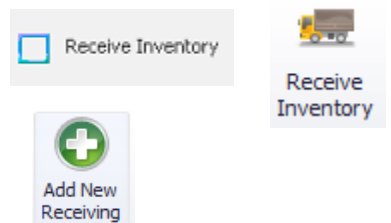
Begin Receiving

What are you receiving?
Select one of the following receiving types

○ Order that has been delivered by a vendor
○ Items that have been transferred from a warehouse or other site
◉ Items received from a price-contract / purchase-order

  - Click **Next**

11

- o **Receive from Price-Contract** – select the appropriate price contract record, and then click **Next**

Begin Receiving

Receive from Price-Contract
Please select the price contract / purchase-order from which you will be receiving

Show valid contracts for   7/7/2022

	Contract ID	PO Number	Vendor	Description	Start Date	End Date
	10		Pepsi	Pepsi 2021-2022	6/2/2022	7/31/2022
	11		Hershey's	Hershey 2021-2022	6/2/2022	7/31/2022
	12		Foster Caviness	Foster 2021-2022	6/2/2022	7/31/2022
	13		Sysco Raleigh	Sysco Food 2021-2022	6/2/2022	7/31/2022
	15		Sysco Raleigh	Sysco Non-Food 2021-2022	6/6/2022	7/31/2022
▶	30		Pizza Hut	Pizza Hut	6/10/2022	12/31/2023

- o **Date Received** - this should be the date of actual delivery
- o Enter **Invoice Number**
- o For each delivered item, enter the **Quantity** received
- o Click **Save Changes** to finish the receiving process for the order

Receiving Information

Receiving ID	(new)	To Site	(309) ALSTON RIDGE MS
Date Received	Thursday, June 30, 2022	From Site	Pizza Hut

Invoice

Invoice Number	1234	Delivery Agent	(n/a)
Purchased Total	0.00	Delivery Fee	0.00
Sales Tax	0.00	Storage Fee	0.00
Donated Total	0.00		

	Quantity Received	Unit Description	Partial Unit	Catalog Number	Item Description	Brand	P
▶	10 cs / 0	8/Slice		55044	Pizza, Cheese, Fresh Delivered	Pizza Hut	
	15 cs / 0	8/Slice		55045	Pizza, Pepperoni, Fresh Delivered	Pizza Hut	

- **Closing an order where NOTHING was delivered**
  - o Edison does not allow an order to be "received" with 0 **Quantity** for all items. Instead, it must be closed
    - ▪ From the **Home** tab, click on the **Review and Approve Orders** button
    - ▪ Use the filters within the **Order Status** section of the **Action** ribbon to search for open orders
    - ▪ Double click on the order to be closed
    - ▪ Review the line items within the order and verify that none were delivered
    - ▪ Click the **Close All** button in the Line Items section of the **Action** ribbon
    - ▪ Click **Yes** on the popup window to close the order and set all open quantities to zero
   - ▪ Click **Save Changes**
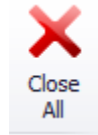
Order Information				
Order ID	1005		To Site	
Ordering Group	Foster Wednesday		Vendor / Warehouse	
Requested Delivery Date	7/13/2022		Automatic Ordering	
Price Contract Date	7/13/2022			

Quantity Ordered	Quantity Open	Unit Description	Catalog Number	It
10 cs / 0	0 cs / 0	138/Each	45502	A
5 cs / 0	0 cs / 0	138/Each	45504	A
8 cs / 0	0 cs / 0	100/Each	45505	A
3 cs / 0	0 cs / 0	138/Each	45507	A
3 cs / 0	0 cs / 0	138/Each	45508	A

- **Editing a Receiving Record**
  - o If a mistake was made on a receiving record, it can be corrected.
    - ▪ From the **Home** tab, click on the **Receive** Inventory button
    - ▪ Use the filters within the **Search** section of the **Action** ribbon to search for the receiving record
    - ▪ Double click the appropriate receiving record OR highlight the receiving record and click the **Edit Receiving Record** button in the **Receiving Records** section of the **Action** ribbon
    - ▪ Make the necessary changes, then click **Save Changes**
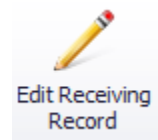
Site-to-Site Transfers
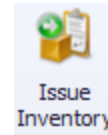
- **Create the transfer**
  - From the **Home** tab, click on the **Issue Inventory** button
  - Click the **Add New Issuing** button
  - Click **Next** in the wizard
  - **Why are you issuing inventory?** – select **Transferring inventory to another site (but not filling an order)**
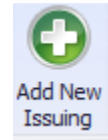
Issue Inventory

Why are you issuing inventory?
Select one of the following issuing types

- ⦿ Transferring inventory to another site (but not filling an order)
- ○ Adjusting Inventory (spoilage, lost, stolen, etc.)

  - **Click Next**
  - Begin typing the name of the site where the items are going, select it from the drop down list

Issue Inventory

Transfer Inventory
Please select the site to which you are transferring inventory

Transfer to Site | a
(303) ABBOTTS CREEK ES
(304) ADAMS ES
(306) HERBERT AKINS ES
(307) ALSTON RIDGE ES
(308) APEX ES

  - Click **Next**
  - Click the **Add Item** button
  - Use the **Search** box to locate a specific item and place a check mark in the column. Multiple items may be selected at one time.

Please select the item to issue

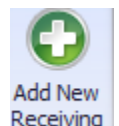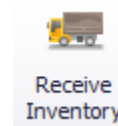- o Click **OK** to add the items to the transfer
- o For each item, type the quantity to be transferred in the yellow "**Quantity Issued**" field
  - ▪ The **Quantity Available** to transfer out is listed for each item
  - ▪ If the **Quantity Issued** exceeds the **Quantity Available**, the **Quantity Available** field will turn red. The transfer will not be able to be completed until the error is resolved.

- o To remove an item, highlight the item and then click the **Delete Item** button
- o Once all items are verified for accuracy, click the **Save Changes** button to complete the transfer.
- o A **Transfer Ticket** report will automatically be generated and can be printed to accompany the items to the receiving school.
- ● **Receiving a transfer**
  - o From the **Home** tab, click on the **Receive Inventory** button
  - o Click the **Add New Receiving** button
  - o Click **Next** in the wizard
  - o **What are you receiving?** – **Items that have been transferred from a warehouse or other site**

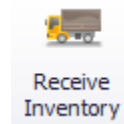- o Click **Next**
- o Select the appropriate transfer record

Begin Receiving

Receive Transfer
Please select the transfer ticket that you are receiving

	ID	Date Issued	Transferred From Site	C
▶	3	7/1/2022	(302) RIVER BEND ES	

- o Click **Next**
- o **Receive** the transfer order. No invoice number is required.
- ● **Editing an issuing record**
  - o If a mistake was made on an issuing record, it can be corrected.
    - ▪ From the **Home** tab, click on the **Receive Inventory** button
    - ▪ Use the filters within the **Search** section of the **Action** ribbon to search for the receiving record
    - ▪ Double click the appropriate receiving record OR highlight the receiving record and click the **Edit Receiving Record** button in the **Receiving Records** section of the **Action** ribbon
    - ▪ Make the necessary changes, then click **Save Changes**

Receive Inventory

Edit Receiving Record

Issuing Inventory (inventory adjustments):

Issue Inventory

- ● **Create an inventory adjustment – this option is used when some type of loss has occurred**
  - o From the **Home** tab, click on the **Issue Inventory** button.
  - o Click the **Add New Issuing** button
  - o Click **Next** on the wizard
  - o **Why are you issuing inventory?** – select **Adjusting Inventory (spoilage, lost, stolen, etc.)**
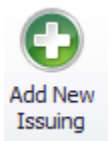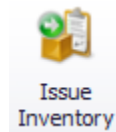
Add New Issuing

Issue Inventory

Why are you issuing inventory?
Select one of the following issuing types

○ Transferring inventory to another site (but not filling an order)

◉ Adjusting Inventory (spoilage, lost, stolen, etc.)

- o Click **Next**
- o **Adjustment Issuing** – select the reason inventory is being negatively adjusted

Issue Inventory

Adjustment Issuing
Please select the reason you are negatively adjusting inventory

- ○ Spoiled
- ○ Broken
- ○ Missing
- ○ Stolen
- ○ Other

- o Click **Next**
- o Click the **Add Item** button
- o Use the **Search** box to locate a specific item and place a check mark in the column. Multiple items may be selected at one time.
- o Click **OK** to add the items to the issuing record
- o For each item, type the quantity to be removed in the yellow "**Quantity Issued**" field
  - ▪ The **Quantity Available** to transfer out is listed for each item
  - ▪ If the **Quantity Issued** exceeds the **Quantity Available**, the **Quantity Available** field will turn red. The issuing record will not be able to be completed until the error is resolved.
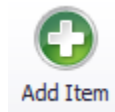
Issue Record

Date Issued 7/1/2022 ▦ ▼ Issued From (303) ABBOTTS CREEK ES

Catalog Number	Item Description	Quantity Issued	Case / Unit Description	Partial Unit Description	Quantity Available
▶ ⊞ 45505	Apple Slices, Fre...	0 cs / 0	100/Each		3 cs / 0

- o To remove an item, highlight the item and then click the **Delete Item** button
- o Once all items are verified for accuracy, click the **Save Changes** button to complete the issuing.
- o Comments are required when completing inventory adjustments. Enter a **comment** regarding the inventory adjustment being made. Once entered, click **OK**.
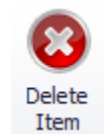
Production:

- From the **Home** tab, click on the **Production** button or click Breakfast Production or Lunch Production from the Checklist
- Choose a **Serving Date** and **Meal Type** from the **Search** section of the **Action** ribbon
   - o The **Serving Date** defaults to the most recent open day

- Print **Production Worksheet (Table Format)** to be used during service

- Print **Food Temp Log** to be used during service

- Review **Meal Planning** – click the **Meal Planning** button
    - o Only recipes with **Planned** counts will appear in the list of recipe to produce
    - o Make any adjustments to **Planned** counts as needed and click **OK**
- **Produce recipes**
    - o Double click on the first recipe to start the **Production** wizard
        - ▪ It is recommended to skip the wizard and go straight to the production screen, click the Skip button on the wizard. You may elect to always skip the wizard if desired.
    - o **Serving Records Produced** - Enter/verify the quantities **Planned, Planned Extras, Prepared, Served, Served Extras,** and **Remaining**, for each **menu count type.**
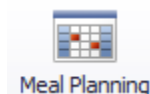
Serving Records Produced

Menu Count Type	Planned	Planned Extras	Prepared	Served	Served Extras	Remaining
PK-05	250	0	250	225	0	25
Adult	15	0	15	10	0	5
A la Carte	0	0	0	0	0	0

- o **Inventory Used for Production** – verify the item information is correct, and that the amount pulled from inventory to create the recipe is accurate. If changes need to be made, enter the correct quantity. If the item can be put back into inventory, enter the quantity in the **Quantity Returned** field.

Inventory Used for Production

Catalog Number	Item Description	Quantity Pulled	Quantity Returned	Case / Unit Description	Quantity Remaining
⊞ 55029	Calzone, Pepperoni & Cheese	0 cs / 0	0 cs / 0	48/Each	12 cs / 0

- o **Leftovers Received from Production**
    - ▪ If there are remaining servings, they will automatically count towards leftovers unless otherwise noted as being discarded.

- If there are **leftovers** being kept, select the **date** it will be served in the **Planned Use** field
  - If the recipe is already on the menu for the **planned use date**, Edison will count the leftovers towards the **Planned Count**, and will consider it when reporting how much product needs to be prepared on the day of service
  - If the recipe is not already on the menu for the **planned use date**, the leftover recipe will be added to the menu, and it will require **Planned Servings** to be entered. It will not assume that all of the leftovers will be reserved.
- If all or some of the remaining servings are not being kept, place a check mark in the **Discard** box
  - If all remaining servings are being discarded, no further action is needed
  - If some remaining servings are being discarded, and some are being kept as leftovers, update the **Discard Quantity** appropriately, and enter a **planned use** date.
  - Enter **Leftover N**otes in the **Leftovers Received** section of the **Action** ribbon, if there are leftovers

- o Click **Finish**
- o Verify the data on the production record for accuracy
- o Click **OK** to save the production record
- o Once production for a recipe is completed, a check mark will appear in the **Produced** column
- o Repeat the steps for each recipe

Leftovers Received from Production							
Catalog Number	Leftover Item Description	Quantity Leftover	Case / Unit Description	Discard	Discard Quantity	Quantity Kept	Planned Use
LO-R55029	Leftover Servings of Pork Pepperoni & Cheese Calzone	30.000 ea	by the each	✓	5.000 ea	25.000 ea	7/8/2022 …

- **Enter Meal Counts**
  - o Prior to being able to close the day, **Meal Counts** must be entered
  - o Click the **Meal Counts** button
  - o Click the + to expand the menu and enter **Served** counts for each **menu count type**
  - o Click **OK** to save
- Print completed **Production Record Report**
  - o Once all production has been completed, print the **North Carolina Production report**
  - o From the **Production** screen, click the **Print** button and select **Production Report**
  - o Select the appropriate filters, and then click **OK** to view the report
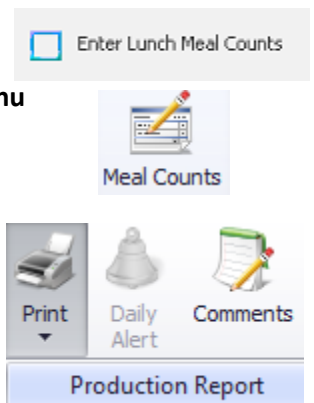
Close Day:

- Once all tasks have been completed for a day, the day should be closed.
    - From the **Home** tab or the **Checklist,** click the **Close Day** button
    - If more than one day is open, select the correct day to close, and then click **OK**.
    - Enter any necessary **comments** relative to the operating day, if needed.
    - Click the box to **acknowledge** that all daily operations have been reviewed and checked for accuracy, and then click **OK**.
        - If **Meal Counts** have not been entered for the day, an alert will be displayed before the day can be officially closed.

Reopen a Closed Day

- On occasion, it may be necessary to reopen a past day in order to make corrections. This should not occur on a regular basis.
    - From the **Home** tab, click the **Open Day** button
    - Select a closed (red) operating day and then click **OK**
    - A **commen**t is required to explain why a closed day is being reopened. Once entered, click **OK**.

Physical Inventory:

- **All orders/transfers should be received, and all production should be completed prior to starting the monthly physical inventory.**
- Begin a new **Physical Inventory**
    - o From the **Home** tab, click the **Physical Inventory** button
    - o Click the **Start New Physical** button
    - o Select the appropriate **Inventory Period**
        - ▪ Only periods enabled by the Central Office will be available to start
        - ▪ **Count Inventory as-of Date** – leave at the default "Last day of the inventory period"
        - ▪ **In addition to inventory tags calculated to be on-hand, which tags should be pre-filled on the worksheet** – leave at the default "Include any inventory tags that were issued or received during the inventory period"
        - ▪ Click **OK**

- Print the Worksheet
  - Highlight the newly created **Physical Inventory** record
  - Click the **Print** button and select "**Worksheet**" from the drop down box
  - Uncheck "**Show Previously Entered Counts**"
    - This will provide a space to handwrite counts on the worksheet

  - Place a check mark in the "**Page-break on Storage Category**" option if desired
  - Click **OK**
  - Print the report and write counted quantities on the space provided
    - Only items Edison thinks a site has in their inventory will appear on the report
    - Pay attention to **Brands** and **Case/Unit Descriptions** – some **Catalog Numbers** may appear more than once because the site has multiple **Brands** and/or **Case/Unit Descriptions** of the "same" item in inventory.

- **Enter Counts**
  - Highlight the newly created **Physical Inventory** record
  - Click the **Enter Counts** button
  - By default, each category is expanded.
    - Click the arrow next to each storage category to collapse a section, if desired.
  - For each item, enter the totals in the **Counted Quantity** column where applicable
  - For any items that are no longer in inventory, enter zero. These items will be removed once the inventory is committed.

Storage Slot ▲	Catalog Number ▲	Item Description	Counted Quantity	Counted Value	Case/Unit Description	Partial Use Unit	Brand
▾ Storage Category: Frozen							
⊞	55029	Calzone, Pepperoni & Cheese	10 cs / 0	$367.0000	48/Each		Albie's
▾ Storage Category: Refrigerated							
⊞	45502	Apple, Fresh, Golden Delicious	4 cs / 0	$165.2000	138/Each		Produce
⊞	45504	Apple, Fresh, Gala	3 cs / 0	$128.7600	138/Each		Produce
⊞	45505	Apple Slices, Fresh, Sweet Red	1 cs / 25	$34.7500	100/Each		Produce
⊞	45507	Apple, Fresh, Red Delicious	2 cs / 30	$93.5739	138/Each		Produce
⊞	45508	Apple, Fresh, Fuji	4 cs / 0	$171.2000	138/Each		Produce
▾ Storage Category: Uncategorized							
⊞	LO-R55029	Leftover Servings of Pork Pepperoni & Cheese Calzone	0.000 ea	$0.0000	by the each		Unknown

  - To add an unlisted item to inventory
    - Click the **Add Item** button
    - Click **New Tag** (when you click "new tag" it then opens a search window that searches the list of items in the program, not just items that had activity within the period.).
    - In the **Pick Item** box, search for the new item, select it and click **OK**

Edit Inventory Tag ✕

Inventory Tag	(new)
Item	[42098] Chips, Potato, Kettle, Sea Salt
Donation Source	None (Purchased)
Lot Number	
Packing Date	☐ 7/1/2022
Expiration Date	☐ 9/29/2022
Price Contract	Contract 13
Purchase Price / Case	26.0200
Delivery Fee / Case	0.0000
Donated Value / Case	0.0000
Storage Fee / Case	0.0000
Tax Rate	0.0000 %
Other Value / Case	0.0000

Ok   Cancel

- ▪ An **Edit Inventory Tag** box is created - click **OK** and the item is added to the list.
            - ▪ Find the item and enter the number of cases/units on hand.
        - o To remove an item
            - ▪ Enter 0 in the **Counted Quantity** column or leave blank, the item will be removed once the inventory is committed
        - o Once all counts have been entered, click **Save Changes**
- ● **Commit Inventory**
    - o Area supervisors will commit the inventories for their sites once they have been reviewed.
- ● **Discrepancies**
    - o If discrepancies exist between inventory on hand and quantities listed in Edison, a window will appear with a list of the discrepancies
    - o Click **Cancel** to return to the inventory screen and make any necessary changes
    - o Click **OK** to commit all counts and complete the physical inventory process

Reports:

- Most reports include a criteria screen that can be used to filter results before the report is displayed.
- Once the report is displayed, click the Show Criteria button to adjust the filters, without having to completely re-run the report.
  - **Inventory Reports**
    - **Cost of Food and Supplies** – cost of food and supplies used for a given date range
    - **Cost of Food Used by Meal and Day** – cost of goods used, broken out by meal and date
    - **Food, Supply, and Donated Inventory on Hand** – total inventory value as of a specified date
    - **Food, Supply, and Donated Receiving Summary** – total inventory received, by type, separated by Purchased Food, Donated Food, and Supplies
    - **Inventory History** – a complete history of all inventory adjustments, by item, for a given date range, including production, receiving, transfers, and adjustments
    - **Inventory On Han**d – a complete listing of inventory on hand as of a specified date
    - **Invoice Summary** – all invoices entered for a given date range, including total received price, grouped by site and vendor
    - **Issuing Detail** – details of inventory adjustments and transfers, for a specified date range
    - **On-Hand and Encumbered Inventory** – displays quantity currently on hand as well as the quantity committed for each item inventory for the selected site(s)
    - **On-Hand and Encumbered Inventory Encumbrance Details** – displays the details of what is on order for all internal order sites (warehouses)
    - **Order/Receiving Discrepancies** – displays line items on orders where the received quantity did not match the ordered quantity, where the ordered price did not match the received price, or where the received item was not on the original order.
    - **Order/Receiving Discrepancy Summary** – a summary of all orders where there is a discrepancy between the order total and the receive total, by invoice.
    - **Perpetual Inventory** – starting quantity, quantity received, quantity issued, ending quantity, and associated cost, for all items in a site's inventory for a specified date range.
    - **Physical Inventory Correction** – shows the variance for each item in a site's inventory based on what was entered during the physical inventory monthly process vs what was accounted for during daily production.
    - **Physical Inventory Progress** – shows the progress for the selected sites for a specified inventory period.
    - Product Expiration – shows items that are about to expire or have expired, by site, for a specified date
    - **Receive Item List** – lists all items received by site, from a specified vendor, for a given date range, to include received quantity and value.

- ▪ **Receiving Details** – lists all items received, by site, for a specified date range, grouped by receipt, to include received quantity, brand, Lot number, case price, and donated value.
- ▪ **Transfer Issue/Receive Discrepancies** – displays orders from warehouses or site-to-site transfers where an item(s) has a different quantity received from what was ordered.
- ▪ **Transfer Order/Issue Discrepancies** – displays orders from warehouses or site-to-site transfers where an item(s) has a different quantity issued from what was ordered.
- ▪ **Transfer Ticket** – shows the items and quantities ordered by a site from an internal source or from another site, to include the transfer number, to and from site information, and any changes made to the quantity issued vs what was ordered.
- ▪ **Transfer Out Summary** – displays the total cost of goods transferred out from a site for a given date range, with or without details.
- ▪ **Unapproved Order Totals by Vendor and Item** – displays total quantity ordered, by item and date range, on all unapproved orders.
- o **Production reports**
  - ▪ **Daily Prepared Food Temperature Log** – this report will display all recipes that require temperatures to be taken and recorded, grouped by date and menu.
  - ▪ **Daily Production Cost** – reports the cost of each ingredient within the recipes that were served at a site
  - ▪ **Menu Planning List** – displays all recipes and their planned counts for a site for a given date range
  - ▪ **Non-Program Cost of Goods** – Provides raw food cost totals for all a la carte and adult sales each month, excluding reimbursable meal costs
  - ▪ **North Carolina Production Report –** food production record report, specific to North Carolina
  - ▪ **Planning Summary –** displays a total count of meals planned for each recipe on a day/date range with the planning counts for site and a group total
  - ▪ **Popular Recipes –** displays popular recipes based on planned, served, or prepared counts, for a specified date range and a single or multiple sites
  - ▪ **Production/Serve Date Discrepancies –** for a specified site or group of sites, the report will display any instances where a menu date (Serve Date) and Production Date exceeds the number of days specified
  - ▪ **Production Worksheet (Table Format) –** displays the ingredient amounts needed for each planned recipe for a given date range, and provides space for cafeteria staff to enter actual quantities used.
  - ▪ **Recipe Ingredients Pull Sheet –** displays the recipes the site plans to serve, along with the planned quantities, and the total amount of each ingredient to pull in order to produce the recipes. Items highlighted in yellow indicate low quantities.
  - ▪ **Recipe Instructions –** shows scaled recipes by site and meal type, for a given date range, to include the total amount of each ingredient needed for each recipe and instructions and nutrient information.
  - ▪ **Satellite/Kitchen Bulk Shipping Report –** this report lists the recipes and quantities prepared for a satellite site by its production kitchen. The report

provides spaces to indicate temperatures and notes for each recipe that will accompany the food from the main site to the satellite site.

- o **Nutrient Analysis Reports**
    - ▪ **Carbohydrate Analysis** – Analyzes carb counts for menus based on menu count type and meal type for a specific site and date range
    - ▪ **Food Item Nutrient Analysis** – displays limited nutrient information for the selected items
    - ▪ **Food Item Nutrient Analysis (Extended)** – displays information for all of the selected nutrients for the specified items
    - ▪ **Meal Pattern Analysis** – analyzes the selected menus against the standards for the specified menu count type
    - ▪ **Nutrient Standards** – displays the nutrient standards set up for each menu count type
    - ▪ **Recipe Listing** – displays recipes with their ingredients and steps
    - ▪ **Recipe Nutrient Composition** – displays each recipe and its associated nutrients
    - ▪ **Weighted Nutrient Analysis** – these worksheets are used to analyze nutrient standards against menu templates, planned counts, served counts, or manually entered counts
- o **Other Reports**
    - ▪ **Automatic Order Discrepancies** – for order groups where planning counts are used to determine ordering quantities, this report will show any instances where a site changed the suggested quantity of an item, and what it was changed to.
    - ▪ **Catalog Numbers without Price Contracts** – displays items that are not on a price contract, as of a specified date
    - ▪ **Incomplete Orders** – shows orders that sites have started but not completed
    - ▪ **IPS Exceptions** – displays discrepancies between quantities and prices on received orders vs quantities and prices on vendor invoices
    - ▪ **Item Allergens** – displays allergen information, based on specified options
    - ▪ **Item Usage** – shows where items are currently in use, based on specified options
    - ▪ **Menu Template Details** – displays menus/recipes on templates for the specified meal type, date range, and options
    - ▪ **Ordering Status** – shows the status of orders for a specified delivery date and ordering group
    - ▪ **Permission Override Requests** – lists the status of all permission override requests for a given date range
    - ▪ **Projected Meal Cost** – using established source criteria, this report will display Cost Per Meal for each menu/date/site
    - ▪ **Recipe Allergens** – displays recipes and their associated allergens
    - ▪ **Recipe Cost per Serving** – displays serving costs for recipes using the established options
    - ▪ **Recipe Instructions by Manual Count** – scales recipes based on the specified number of servings
    - ▪ **User Activity Log** – displays user activity, based on the selected actions and options