Version 8.x
Installation, Implementation and Training

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Implementation Outline

- ☐ Get the server hardware ready.
    - Server 2003 is functional.
    - Server has been added to the district network as appropriate.
- ☐ Install SQL 2005 or 2008
    - Attach Meals Plus database.
    - Set Security for SQL.
    - Set up a maintenance plan.
- ☐ Set up Meals Plus 8.0
    - Install central office client(s).
        - App.ConfigUtility will need to be run to point to the server.
    - Install/setup external hardware.
    - Set up Schools.
    - Set up users and security.
    - Set up items for serving.
    - Set up income brackets if using Student Eligibility.
    - Review Letters and make changes if needed.
    - Install school clients.
    - Export Student data from existing system (if available).
    - Import Students into 8.0.
- ☐ On-site Visit
    - Software training.
    - Go live with software.

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Meals Plus Requirements

Server

# of Schools	Processor type	Processor speed	Memory (RAM)
1 – 15 Schools	Pentium III processor or higher	Minimum: 1.3 GHz Recommended: 2 GHz or higher	Minimum: 1 GB Recommended: 4 GB or more
16 – 30 Schools	Pentium Xeon processor or higher	Minimum: 1.5 GHz Recommended: 2 GHz or higher	Minimum: 2 GB Recommended: 4 GB or more
31 – 60 Schools	Pentium Dual Core Xeon processor or higher	Minimum: 1.6 GHz Recommended: 2.33 GHz, 800MHz FSB or higher	Minimum: 4 GB Recommended: 4GB or more
61+ Schools	Pentium Quad Core Xeon processor or higher ***Recommended: Dual Processors***	Minimum: 1.6 GHz Recommended: 2 GHz, 1066 MHz FSB or higher	Minimum: 4 GB Recommended: 6 GB or more
# of Schools	**Hard Drive Configuration**	**Operating System**	**SQL Server 2005 Edition**
1 – 15 Schools	RAID 1 w/ two 73GB 7.2K RPM drives or higher	Windows Server® 2003 w/ SP2 or higher	Standard Edition or higher
16 – 30 Schools	RAID 5 w/ four 73GB 10K RPM drives or higher	Windows Server® 2003 w/ SP2 or higher	Standard Edition or higher
31 – 60 Schools	RAID 5 w/ four 73GB 10K RPM drives or higher	Windows Server® 2003 w/ SP2 or higher	Standard Edition or higher
60 + Schools	RAID 5 w/ four 73 GB 10k RPM drives or higher	Windows Server® 2003 w/ SP2 or higher	Standard Edition or higher

Client

- Pentium III processor or higher.
- 512 MB RAM or higher.
- 100/1000 NIC.
- Monitor with 1024 x 768 Resolution.
- Windows XP Service Pack 2 or higher.
- Minimum T1 connection between sites.

Installation and Configuration

Server Install

Server Setup

- ☐ Verify the server meets the minimum requirements based on the number of schools.
    - Processor, RAM, Hard Drive Configuration, Partition Sizes, OS, SQL Server Edition, etc. (Refer to Hardware Specs).
- ☐ Install SQL Server 2005 with the appropriate settings and service packs.
- ☐ Verify the SQL 2005 Installation.
    - Was Windows Only or Mixed Mode Authentication used?
    - Has TCP/IP, Named Pipes and Shared Memory been enabled?

SQL Setup

- ☐ Attach the MealsPlusDB
    - Owner should be ***sa***.
    - Recovery model should be ***Full***.
    - Do NOT place data files on the system partition if possible.
- ☐ Create the appropriate accounts in SQL. All client logins will need *db_owner* privileges to the *MealsPlusDB,* and *db_datareader* privileges to *Master*; nothing else.
- ☐ Configure SQL 2005 for the appropriate backup and maintenance plans.
    - Backup daily to a remote computer or storage device.
    - “Rebuild Index” once a week or daily. For large districts, 30+, set a daily task. Schedule for early am on a weekend.
    - Schedule a History Cleanup once a week or once a month as needed to remove the old records.

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MealsPlus Service

- ☐ Verify where MealsPlus Service should be installed.
  - If they prefer for the service to be installed on the server, create a directory: C:\Program Files\Meals Plus\Service and copy the files there as well as the mealsplus.config. Run the ***Install MP.WebServiceClient.bat*** file.
  - Once installed, go to Administrative Tools\Services and find ***Meals Plus Service*** and configure as needed for the district.
  - Recommended settings:
    - Automatic and Log on as: “Network Service” if installed on a machine other than the server. The account that the service runs under must have permission to that share or network resource and MealsPlusDB.
    - Automatic and Log on as “Local System Account” if installed on the server.

Client Install

- ☐ Client machine
  - Windows XP Professional with SP2
  - 512 MB RAM
- ☐ Install software using the 8.0 CD. This will also install .Net 2.0 and Crystal Reports if needed.
- ☐ Configure 8.0 by using ***App.ConfigUtility.exe***.

System Management Training Outline

- ☐ Pre-implementation list can be found in Appendix B.
- ☐ Site Setup with Licensing
  - Obtain License from Mealsplus (districtname.mpx).
  - Load license file or view existing license.
  - Enter site ID, description and select appropriate products.
- ☐ User Groups
  - View authorization for existing user groups.
  - Modify user groups.
  - Add new user groups.
- ☐ User Setup
  - Enter username, password, first name, last name, and user group to add a new user.
  - Discuss password expiration frequency.
  - Assign site access to users based on which sites they have access to.
- ☐ Control File setup in POS
  - User must have Administrator rights.
  - Unit code and unit name cannot be changed here and will be grayed out.
  - Address is optional.
  - Attendance Factor can be entered which will be used on various reports.
- ☐ Site Group Setup in POS
  - Enter site description.
  - Each school must be assigned one of these Site Groups.

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☐ Site Setup in POS

- Site ID and Name will Auto populate from licensing section in System Management.
- Site may not be added here.
- Select a Site Group from the drop down.
- Select a Serving Site from the drop down.
- Min. prepaid the amount of prepay which qualifies for additional credit.
- Additional Credit % is the amount of extra credit given to a prepayment at or above the Min. Prepaid amount.
- Max $ Charge is the max charge amount allowed per student at this site.
- Default A La Carte Expenses allows for specifying maximum a la carte expense in a given time period.

☐ Item Setup in POS

- If you wish to convert supplemental sales to reimbursable meals, you will have to assign a nutrition code other than X.
- You may specify price by grade for various items.
- Grade 00 will default to all grades.
- Prohibit restricts sales to a group of accounts based on status.
- Assign users will give only the users you want access to serve specific items.

☐ Importing students

- Select the method of assigning serving number to be used (Administration, Control file).
- Required fields for student import file – Stu#, Student first name/ last name and site number.
- Import student file via a CSV or formatted text file.
- Enter enrolled value and withdrawn value (if applicable).

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Point of Sale Training Outline

Cashier Training

- ☐ Item Access Setup
    - Show user how to remove items they don't want to see and set the order of the items they use the most.
- ☐ Serving Breakfast/ Lunch
    - Select the correct meal (lunch or breakfast).
    - Verify the date is correct. *This is very important.*
    - Verify the serving site is correct.
    - Enter a quick serve item if you wish.
    - Turn touch screen on or off depending on your needs.
- ☐ Reviewing the serving screen
    - ID field, what this is and how it works.
    - Name lookup
        - If a child has forgotten their ID, they can be looked up by name using Name Lookup…demonstrate.
    - Visiting Student
    - Cashier information section
    - Student Information
        - Grade
        - Teacher
        - Special Notes
    - Available items
        - Touch Screen – Touch the item you want to add.
        - Non-Touch – Enter the number or click the item with your mouse.

- Item Purchased
    - + and – keys

- Payment Section
    - Money Keys
    - Payment information section
- Function Keys
    - F2 – Edit Quantity
    - F5 – History
    - F6 – Review
    - F7 – Void
    - F8 – Clear
    - F9 – Cash
    - F11 – Other
    - F4 – Receipt on or off

☐ Cash Sales and Account Sales – What's the Difference?

☐ Sample Transactions

- Lunch – Cash Sale
- Lunch – Cash Sale
- Lunch – Account Sale
- Lunch – Account Sale
- Lunch + Supp – Cash Sale
- Lunch + Supp – Account Sale
- Milk Only – Cash Sale
- Milk Only – Account Sale
- Multiple quantity – Account Sale
- Multiple quantity – Cash Sale

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- Multiple Items – Cash Sale
- Lunch – Show already served
- Extra items (already had a meal)
- Multiple Items – Account Sale
- Transaction – clear screen then do over
- No Lunch, Payment only
- Show that child is withdrawn
- Split Sale (part paid in cash, part with account)
- Lunch then immediate Review/Void
- Review/Void Transaction
- Re-key Transaction
- Split Sale (again)
- Multiple Items –Remove one of the items item

☐ Review Serving Other Items

☐ Review Serve By Teacher

- Choose Buy Items
- Choose Items
- Choose Buy (F11 if non-touch screen)
- Review Items Bought Section
- Review Amt Due and Paid section
- When finished with all sales for that class, click Checkout (F11 if non-touch)

☐ Meals Summary

- Choose type, serving site and user.
- Verify date and enter opening cash and ending cash.
- Explain summary screen.

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Manager Training

- ☐ Daily Deposit
  - Select serving site and enter total deposit amount.
  - Enter attendance and click continue.
  - Review the deposit reconciliation report.
- ☐ Reports
  - Item Summary
  - Participation
  - Receipts and Collections
  - Transaction History
  - Checks Summary
  - F8 Audit Report
  - States Reports if any are needed.
- ☐ Student Reports – Quick overview so manager knows where to go to print student rosters, letters, account balances, etc.

Student Eligibility Training Outline

Administration

- ☐ Setting up the Control File
    - General Tab
        - Unit code and unit name cannot be changed here.
        - Address Tab
        - Temp Period Days
        - School Fiscal Year
    - Contact Info Tab
        - Enter the contact information; Director and Hearing Officer.
    - Release Categories
    - Scanning Tabs – Sets preferences for handling duplicates when scanning applications.
- ☐ Setting up Income Brackets
    - Separate income chart for each year.
- ☐ Letter Setup
    - Show customization of letters.
    - Sample letters are provided in English and Spanish.
    - If an additional language is needed, enter the translated text for all the letters used with that language.
    - Editing a letter template – Start with Default VS. Modifying an existing template.
- ☐ Meal Benefit Expiration
    - Used to set expiration dates for students that didn't submit an application.
    - Multiple dates can be set.

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Processing

- ☐ New Application
  - To add a new application, follow these 4 steps.
    - Step 1: Student Information
    - Step 2: Household Information
    - Step 3: Additional Household Members
    - Step 4: Review and Save
  - Review how to enter various types of applications.
    - Income based application
    - Direct Certified application
    - Temporary application
    - Foster Child application
    - Emancipated Minor application
    - HMR application
- ☐ Manage Application
  - To view an application, you can double click the application or highlight the application and click View/Modify.
  - When reviewing an existing application you can:
    - Modify the application.
      - Move a student to the household tab.
      - Parent declines benefits.
      - Add students to the application.
    - Delete the application.
    - View the history.
    - View the image if the application was scanned.
    - Review or add notes.

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Verification

- ☐ Configuration
  - As of date – The application date is used to determine which applications should be eligible for verification. Only applications with a date on or before the "As of" date will be counted.
  - 3 Verification Choices
    - Basic – selects a percentage of all approved applications, but targets those that fall within the error prone limit (usually $1200 annually).
    - Alternate Random – selects a percentage from all approved applications.
    - Alternate Focused – selects a percentage from the error prone group and a percentage from the approved applications with case numbers.

Letters

- ☐ Printing Letters
  - Notification Letters
    - This screen handles both Notification and Direct Certified Letters.
    - A letter is generated every time a status or application date is changed.
  - Temporary Reminder Letters
    - These letters are used to remind families to re-apply if they want to continue to receive free or reduced meals.
    - All temporary approvals (free or reduced) will automatically be changed to status 4 (denied) on their expiration dates.

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Reports

- ☐ Status Change
- ☐ Master Roster
- ☐ Demographics
- ☐ Transfer/Withdrawn
- ☐ Letter History
- ☐ Meal Benefit Expiration

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Accountability Training Outline

- ☐ Control File
  - Unit code and unit name cannot be changed here and will be grayed out.
  - Address is optional.
  - If using AS400/CMS, enter IP address and login information here.
  - Meal Equivalents are entered here and used for calculating the Meals per Labor Hour Report.
- ☐ Reimbursement Rates
  - Enter reimbursement rates that apply for federal and/or state reimbursable meals and snacks.
  - This information is used for the Reimbursement Report and the Revenue Summary.
- ☐ Reports
  - Receipts and Collections
  - Accuclaim Edit
  - Monthly Claim Form
  - Reimbursement
  - Revenue Summary
  - Participation
  - Meal Per Labor Hour
  - Unclosed Dates
- ☐ Utilities
  - SC Snacs
    - This option builds an XML file for importing claims into SC SNACS.
  - Export Totals
    - To CMS exports monthly participation data to the AS400.
    - To file creates a text file with participation data for the month and school(s) selected.

Inventory Training Outline

Administration

- ☐ Control File
  - Unit code and unit name cannot be changed.
  - Address can be edited if needed.
  - Choose Perpetual or Summary Inventory
  - If using CMS, chose export settings.
- ☐ Site Setup
  - Contact and address information for each site can be added here.
  - Create Warehouse.
- ☐ Acct. Category Setup
  - Used in Item Maintenance to group different types of inventory items for accounting purposes.
  - Step can be skipped if user does not want to use account categories.
- ☐ Bid Group Setup
  - Used in Inventory to group items together for bidding purposes and reports.
  - Bid Analysis routine uses Bid Groups to determine which items go together on a bid.
- ☐ Item Group Setup
  - Used in Item Maintenance to group items together for searching and filtering on reports and screens.
- ☐ Tax Group Setup
  - Allow user to define specific sales tax configurations that may apply to various inventory items.

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- ☐ Vendor Setup
  - The file includes all the vendor information needed for ordering and receiving inventory.
  - Configure Elec. File
- ☐ Item Maintenance
  - Define a manage items used in inventory.
  - Review upper grid – qty on hand and value on hand.
  - Review adding a new inventory item.
    - Bid Price information
    - Bid Analysis section
    - Menu costing (if using Menus)
  - Assigning site access.

Orders

- ☐ Manage Orders
  - Review View options.
  - Create new order.
  - View and Edit orders.
  - Duplicate Orders.
  - Close orders – used only if you do not want to generate a PO.
  - Delete orders – only open orders can be deleted.
  - Create P.O.(s)
    - Invalid bid price message
    - Create
    - Warehouse Orders – created automatically when PO's a created if the item ordered is available in the warehouse.

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- ☐ View Purchase Orders
    - Print
    - Electronic File – can only be used if the electronic file feature is enabled for the vendor

Transactions

- ☐ Receive Inventory
    - Receiving increases on hand quantities and value.
    - Receive with Order
        - Use View/Edit
        - Verify receipt date, item numbers and quantities, and prices.
        - Save, update on hand and keep open if some items have not been received yet.
        - Save update on hand and close if user has finished processing everything on the PO.
- ☐ Transfer
    - Select transfer date, from site and to site.
    - Enter transferred items and quantities.
    - Save, update on hand and close.
- ☐ Usage
    - Will decrease on hand inventory.
- ☐ Adjustment
    - Typically used to correct errors.
    - May also be used to update the warehouse if food has been lost.

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- ☐ Physical
    - Used for recording physical counts at the end of an inventory period.
    - Enter and save prior transactions before closing a physical.

Bid Analysis

- ☐ Create/Print Bids
    - Establishes the Bid Dates and Bid Specifications.
    - Allows user to print Bid Solicitation reports to send to vendors.
    - Review following actions:
        - Create New
        - View/Edit
        - Close Bid(s)
        - Export Bid
- ☐ Vendor Feedback
    - Used the enter vendors proposed prices.
    - Create New to enter feedback from each vendor.
- ☐ Award Bid
    - Analyze based on bottom line or cost per serving.
    - Award Bid.
- ☐ Print Awarded Bids

Reports

- ☐ On hand
- ☐ Item Listing
- ☐ Open Orders
- ☐ Order Forms

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- ☐ Physical Inventory Form
- ☐ Warehouse Hold

Utilities

- ☐ Import
  - CMS Master
  - Item File
- ☐ Export
  - Orders to CMS
  - Physicals to CMS

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Menus Training Outline

Administration

☐ Control File

- Unit code and unit name cannot be changed here and will be grayed out.
- Address is optional.
- Apply Cycle – tells the program how to handle non-serving days in a school week.
- Inventory Integration – If the customer also has the Inventory module, they may choose to:
    - Update Inventory – option will update Inventory Usage from Production Records.
    - Calculate Cost Per Serving – automatically calculate recipe and menu costs based on Inventory bid prices.

☐ Site Setup

- Site ID comes from the license and cannot be changed.
- Description and Site Group can be changed, but if changed will affect all Meals Plus products.
- Breakfast FF and Lunch FF – This is the number of reimbursable meals you usually serve. FF = Feeding Figure.

☐ Nutritional Standards

- Description – A unique description for each nutritional standard (i.e. Elementary Breakfast, High School Lunch).
- Analysis Type – NSMP (Nutrient Standard Menu Planning) or FBMP (Food-Based Menu Planning)
- Meal Type – Breakfast or Lunch

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- Grade or Age – Modified RDA's use predetermined age or grade groupings.
  - With Standard RDA's you create your own groupings by grade or age. If you select a range of ages or grades, the nutrient standard will be an average of the selected range.
  - The USDA standards have predetermined ages for each grade. Kindergarten is age 5; first grade is 6; and so on through grade 12 which is age 17.
- Nutritional Standards
  - NSMP – USDA required cannot be edited and are based on the USDA's RDA list. User Defined is where you may add additional standards if you like.
  - FBMP – Breakfast has multiple rows of daily standards to handle the different Meat/Grain choices. Lunch has weekly standards as well as daily standards.

☐ School Calendar

- Multiple school calendars can be created within a single fiscal year.
- Exemptions will need to be set for each week day or series of days that you will not be serving school meals (such as vacations and holidays).
- Serving Checkbox – This is to be used if you are serving meals on a day marked as an exception. If you plan to serve meals on a Saturday or Sunday, list that day as an exception and check the Serving box.

☐ Inventory Item

- This screen is only available if you are licensed to use Meals Plus Inventory.
- It associates the **Menus Ingredients** that are used in your recipes with your **Inventory Item Codes** for menu costing.

- It is also used to update Inventory Usage from Production.

☐ Public Calendar Template

- You can create multiple templates that can be distributed to the public.
- A title, primary and secondary color and up to 3 images can be added.
- Any text you wish can be displayed in the News section.

Ingredients and Recipes

☐ Ingredient Groups

- These make is easier to search data and filter information for reports.
- Additional groups may be added, but no default groups may be deleted.

☐ Manage Ingredients

- Current USDA ingredients are provided and cannot be edited.
- Additional ingredients (Local Ingredients) may be added and will begin with ID Code 900000.
- Buying Guide – has information from USDA about the quantity of ready-to-serve, ready-to-cook or cooked food obtained from a purchased unit of food.
- If an existing ingredient, such as French fries, is also a recipe, you can use the convert to a recipe button.

☐ Recipe Groups

- These make is easier to search data and filter information for reports.
- Additional groups may be added, but no default groups may be deleted.

☐ Manage Recipes

- Some sample recipes have been installed. Customers should verify their accuracy before using them.
- Additional recipes may be added and will begin with 'R-' then a four digit number.

- Review tabs for entering a recipe
    - Recipe Info – contains additional information for Food-Based Analysis, menu costing and Production.
    - Ingredients – enter ingredients used for recipe. You can type the ID code or use the search to look up the ingredient(s).
    - Nutrients – used to review nutritional information for one serving.
    - Directions – use this tab to enter recipe directions.
    - Notes – additional notes on preparing and serving the recipe.
    - Fat/Moisture Change – used to record gains and losses during preparation.

Menus

- ☐ Cycle Menu – Used to create menus and apply to sites and school calendars.
    - Create new cycle menu.
        - Enter feeding figure.
        - Add recipes. Mark recipes that should be analyzed for weighted analysis as A/R type Reimb.
        - Repeat for each day in the cycle menu.
        - When complete run weighted analysis.
            - Tell analysis what day to start on and how many days to analyze.
            - Click Start Analyzing.
            - Standards not met will be highlighted in red.
    - View/Edit – Used if a change needs to be made to a menu.

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- Duplicate
    - Enter new Menu description and click duplicate.
    - If a different nutritional standard is needed on the duplicated menu, select the menu and change in the bottom grid.
- Apply – Use to apply the cycle menu to the school year after all days in the cycle menu are complete.
    - The menu will be applied to the site(s) or site group(s) selected based on each site's feeding figure in site setup.

☐ School Daily Menu – Used to view or edit an existing menu.

- You can add or remove recipes here.
- Usually used if the menu changes for a special event such as a turkey lunch before Thanksgiving.

☐ Reports

- Ingredient Listing – nutrient information of selected ingredients.
- Recipe Listing – nutrient information of selected recipes.
- Recipe Preparation – preparation reports by recipe, cycle menu or school daily menu.
- Public Calendar – calendar that can be used for distribution.
- Calendar Report – menu items for each school and date.
- Discontinued Ingredients – list of ingredients to be discontinued.
- RDA List – nutrient standard information used for analysis.
- FBMP List – food based standards used for analysis.
- Weighted Analysis – analysis report.
- Menu Costing – Total cost of a daily menu.
- Production Order Forecasting

☐ Production Report – Pre- and post-production reports.

- See Production Training Outline for more information.

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Production Training Outline

- ☐ Planning Status
  - To be done at any time after the School Daily Menu has been set up.
  - Populated with information from the daily menu.
  - Sections 6-10 are only needed for the planning phase.
    - Food Item – daily menu items are listed but can be edited if needed.
    - Serving Size – information is populated from daily menu.
    - Planned number of servings
      - Student Reimbursable – the number of planned reimbursable servings from the daily menu.
      - Total – include reimbursable, a la cart and adult servings.
    - Planned Quantity/Portions – amount needed to prepare the total planned servings.
    - Recipe number – populated from the recipe.
  - When complete choose 'Save Only'.
- ☐ Open Status
  - Used to enter production and service records.
    - Menu – enter production times and temperatures for any recipe.
    - School Date and Time – automatically entered.
    - Meal Planning – Where substitutions made? Notes on substitutions can be entered in section 11. Total planned meals is automatically filled in, but can be edited.

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- Number served – enter counts for the following categories.
  - Students served
  - Grade Level
  - Catered Meals
  - SFS Adult meals
  - Other Meals
  - Offer VS Serve – if used, enter grades (i.e KI-05)
- Personnel – Check items that apply and any corrective action taken.
- Directions, comment, other information – any comments or directions relevant to production or preparation.
- Quantity/portions available – quantity of each item that was actually prepared.
- Other non-reimbursable servings – number of portions for non-reimbursable meals.
- Leftovers – record in accordance with HACCP and local guidelines.

- When complete, chose to 'Save and Close Record' or 'Save, Print and Close Record'
- If you are using inventory and have tied inventory items to recipes, you will receive an Update Inventory Usage Screen when the record is closed.

☐ Update Inventory Usage

- All ingredients used in the meal will be listed on the Usage screen
- Verify quantities before you Update Usage.
- Primary and secondary quantities can be edited.
- Rows highlighted in yellow means that the inventory item does not have a secondary weight.
- Rows highlighted in pink means no item is associated with the ingredient.

Time Clock

Time Clock Employee

- ☐ Clock In/Out
  - Employee Number and PIN
  - Forgot PIN?
  - Multiple Job Assignments
  - If you forget to clock out
- ☐ Time Sheet
  - Time Worked
  - Approve
  - Leave Accruals
- ☐ Requests
  - Create Requests
  - View Requests
  - Missed Clock Out Request
- ☐ Change PIN
- ☐ My Info

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Time Clock Administration

- ☐ Administration
  - Control File
  - School Calendar
  - Leave Setup
  - Job Setup
  - Certification Class Setup
  - Request Setup
- ☐ Manage
  - Employees
    - Employee Info
      - Enter new employees.
      - View and edit existing employees.
    - Job Tab
      - Each employee must have a job assignment.
      - Employees may have multiple job assignments.
    - Leave History
      - View leave history and enter adjustments for accrued leave.
      - Summarized line for each leave type.
    - Certification Classes
      - Record certification classes an employee has completed.
    - Notes
  - Request
    - Manage system generated request.
    - Manage Employee request.

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- Time Sheets
  - Time Clock
    - Edit and approve employee time sheets.
    - Black – approved by employee.
    - Orange – not approved by employee.
    - Blue – approved by administrator.
  - Leave Taken
    - Use to add or edit absences.
  - Approvals
    - Upper right grid summarizes the time for each day and gives weekly totals.
    - Has checkboxes for approvals.

Utilities

☐ Comp Time

- Adds accumulated comp time to the employees' earned leave.
- Should be ran after the work week is complete.
- Time sheets must be approved before comp time can be processed.

☐ Export

- Exports time and leave records to a text file.

Reports

☐ Time Sheets

- Summary by week.
- Summary by day.
- Can specify site, week begin date and number of weeks.

- ☐ Leave
  - Leave taken or leave balance report.
  - Can be run for an entire site or single employee.
- ☐ Exceptions
  - Report of late arrivals or missed clock-outs.

Current Employee Activity

- ☐ Snapshot of current Time Clock Activity.
- ☐ Multiple Views
  - Present
  - Absent
  - Arrived late
  - Left early

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Appendix A – SQL Help

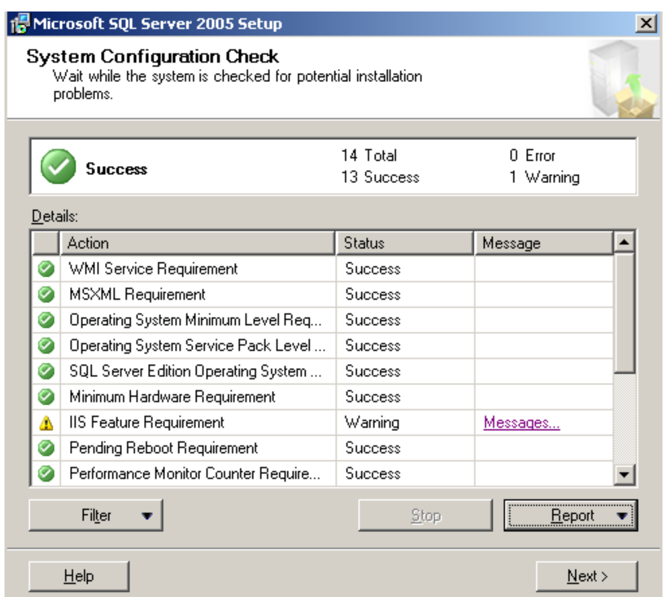
SQL 2005 Recommended Install

☐ Install IIS

- Control Panel, Windows Components
- Choose Application Server, then Details
- Choose Internet Information Services

☐ Install SQL 2005

- Select Install
- After System Configuration Check has run, make sure there are no errors or warnings other than IIS. IIS is not required. If there are, correct and restart installation.



- Registration Information: Customer will provide.

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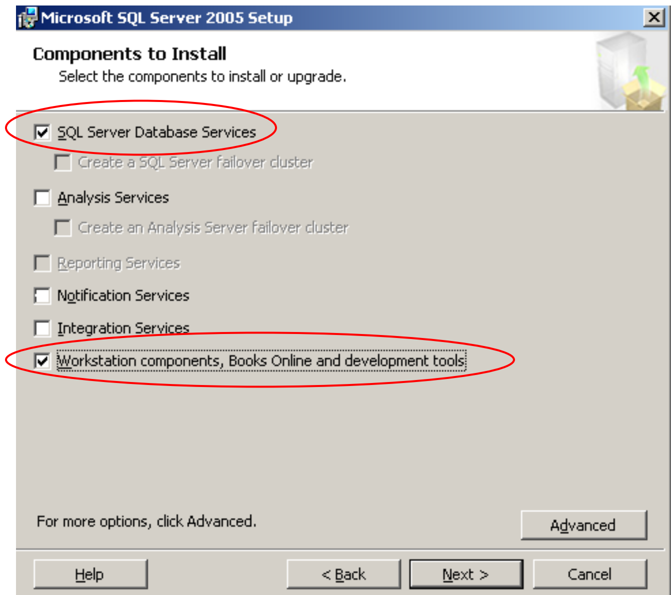
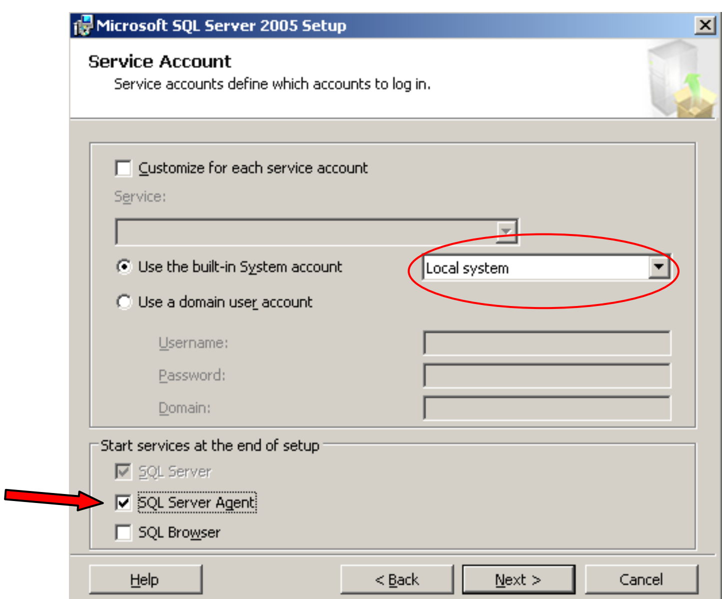
- Components to install:



- Choose SQL Server Database Services and Workstation Components
- 'Click' Advanced
- Change the installation path to D, if available

- Instance Name: It is the *customer's choice* to use the default instance or a named instance.
- Service Account:



Select the built-in system account; Local System

'Check' SQL Server Agent, to start at end of setup

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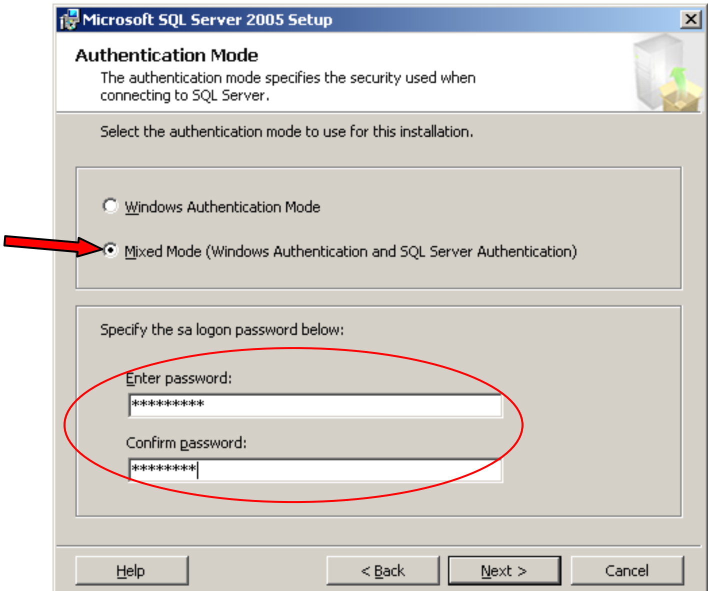
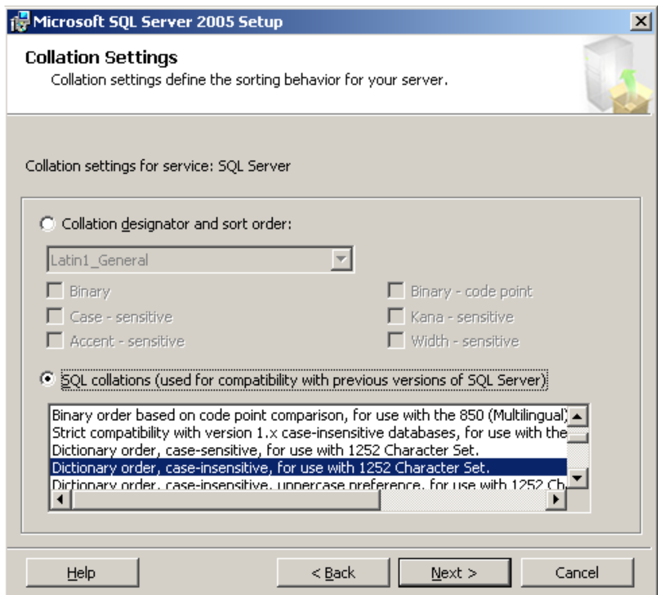
- Authentication Mode:



Choose 'Mixed Mode' if a customer does not have a Windows Domain **or** has one, but does not plan on creating a group to provide access to the Meals Plus Product Suite.

- Collation Settings:



Do not change anything on this screen.

- Error and Usage Report Settings: Nothing has to be selected here. This is completely up to the customer.

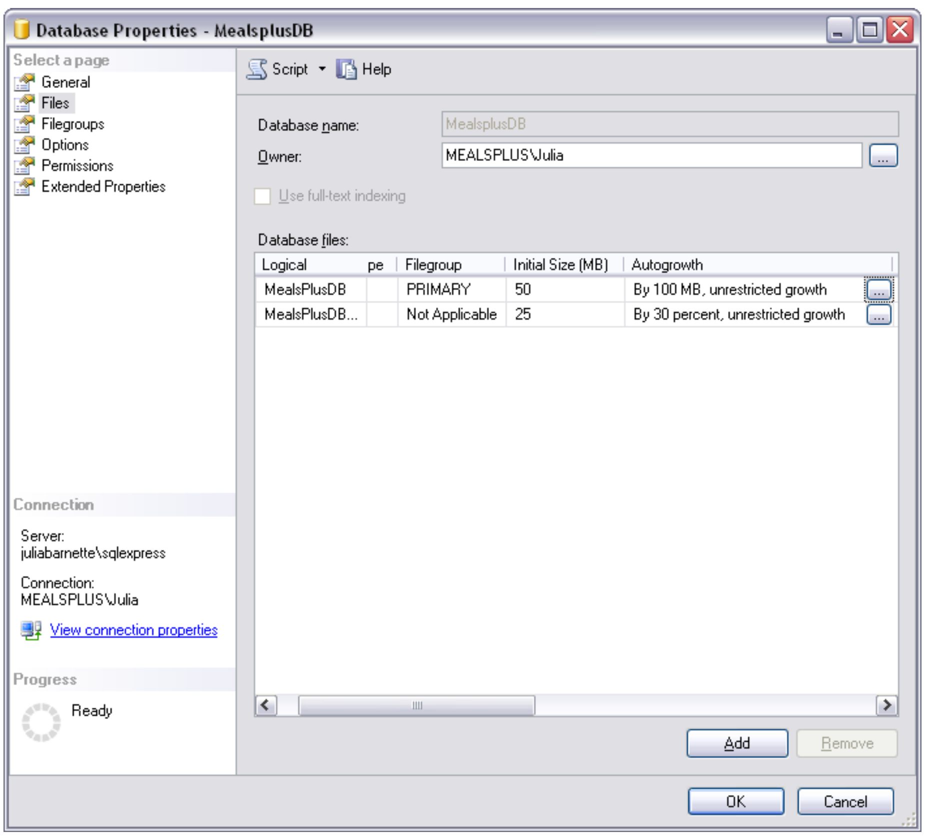
- Ready to Install: Double check the components to be installed and click Install.

☐ Install Service Pack 2 for SQL 2005.

Recommended Database Settings

When creating a mealsplus database for a new customer, the data and log file sizes need to be edited from the default. Below are the steps to do so.

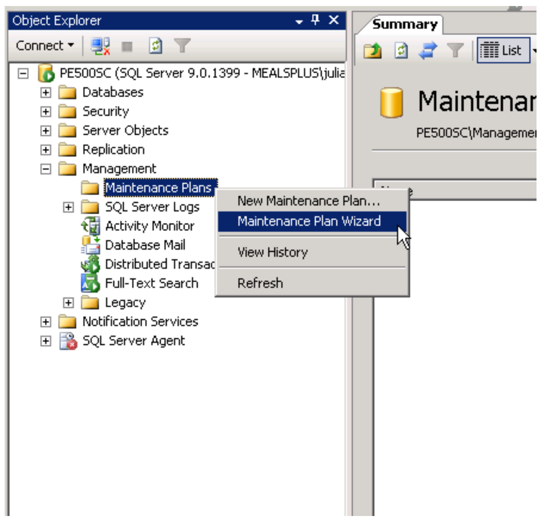
- ☐ Right click on database and choose attach.
- ☐ Locate the mealsplusdb.mdf.
- ☐ Remove the ldf from the bottom portion so it will be created and click OK.
- ☐ Right click on MealsplusDB, and choose properties.
- ☐ Select Files from the left hand side.
- ☐ Set Initial Size for the data and log files as 400 MB each and Autogrowth to 400MB for the data file and 40% for the log file.
- ☐ When finished click OK.



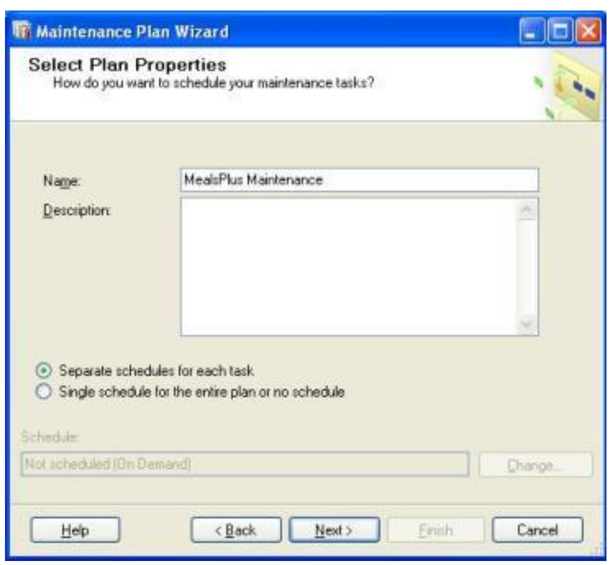
Recommended Backup Maintenance Plans

1. Rebuild Index and Clean Up History

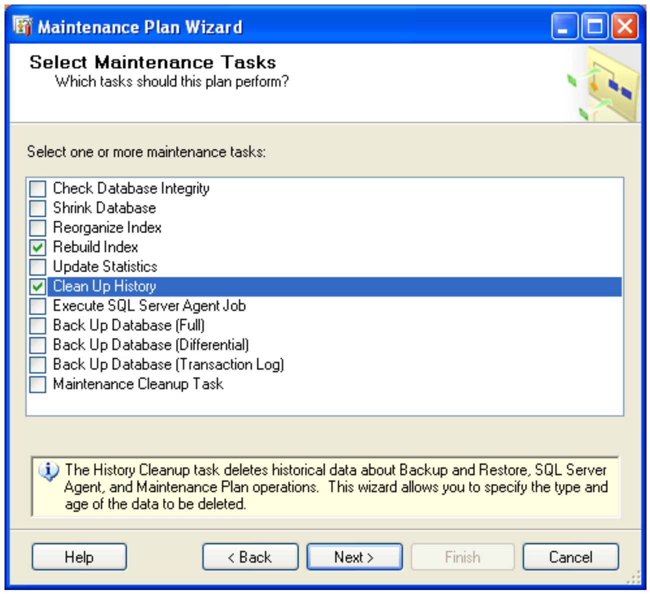
☐ Once in Management Studio for SQL 2005, expand Management and right click on Maintenance Plans. Choose Maintenance Plan Wizard.



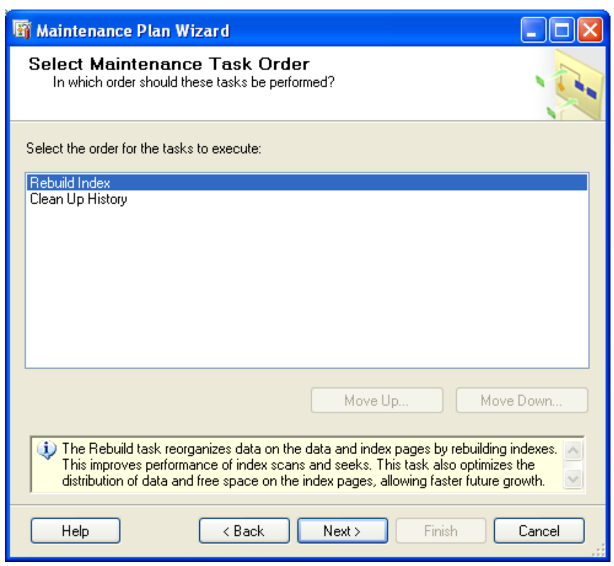
☐ Give your maintenance plan a name and choose Separate schedules for each task. For the first plan, we recommend Rebuild Index\Clean up.



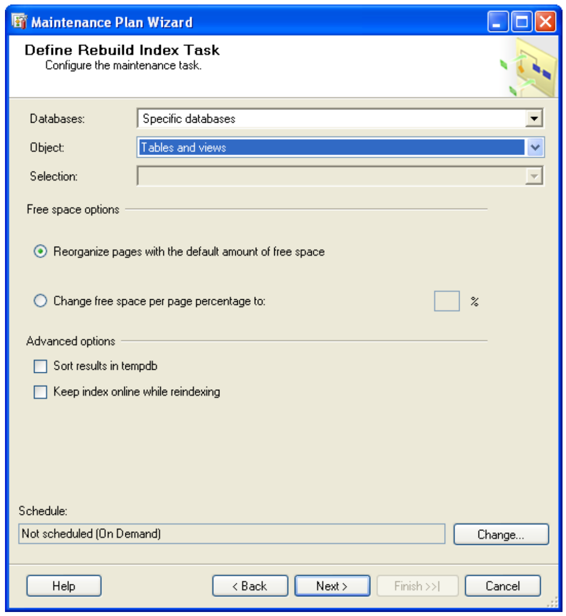
☐ From the list, select Rebuild index and Clean up history.



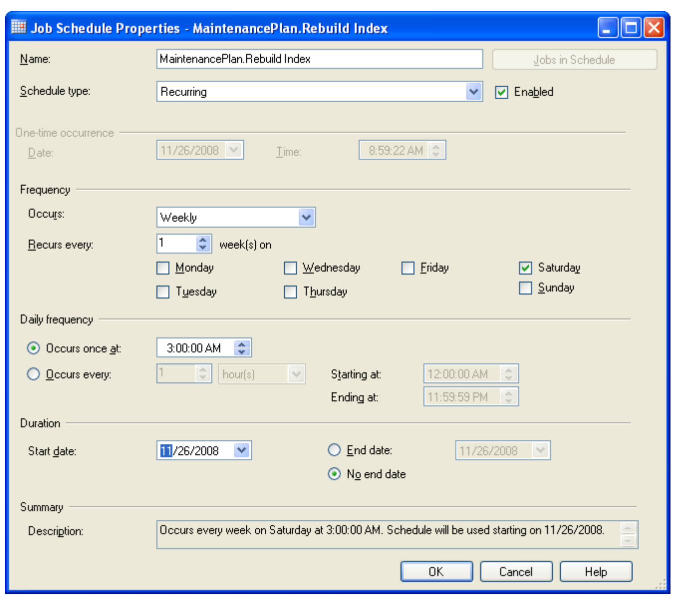
☐ Verify tasks and click Next.



- ☐ Click the drop down, select the appropriate database(s) (typically mealsplusDB, but could include TeleformDB, MealsPlusAgentDB, etc.) then choose **change** to edit the schedule.



- ☐ Set rebuild index to run weekly on Saturday at 3:00 AM, Click OK, and then Next to continue to the next task.



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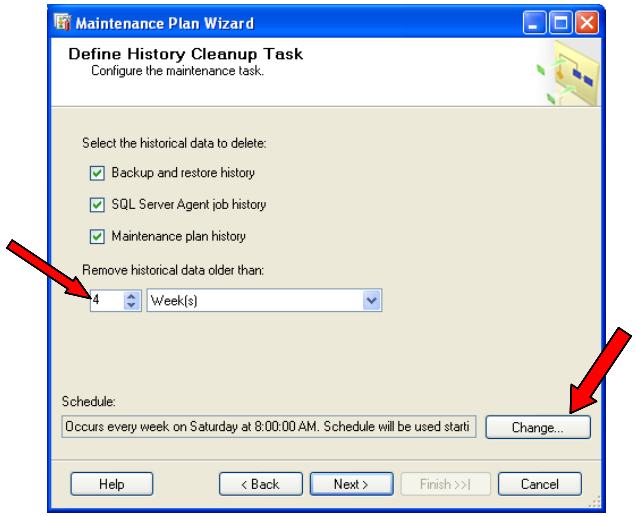
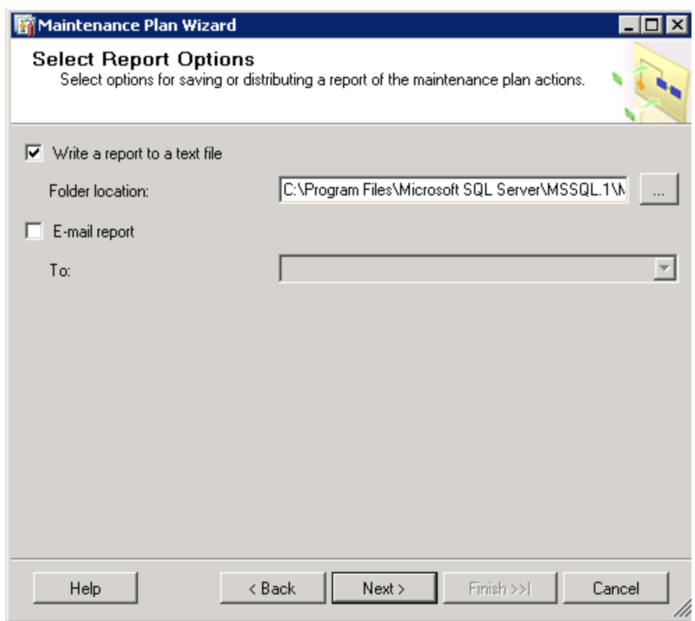
☐ Check all 3 boxes to delete, change data older than 4 weeks and then click **change** to set the schedule.



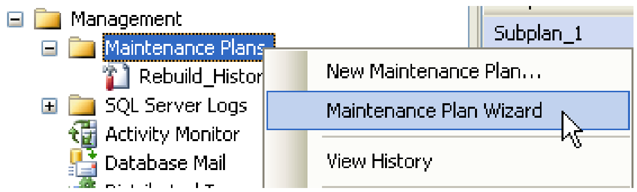
- Set History Cleanup to run weekly on Saturday at 8:00 AM.
- Choose Next and then Next on the Select Report Options.



- Click Finish to Complete the Wizard and the plan will be created.

2. Backup Transaction Log and Database

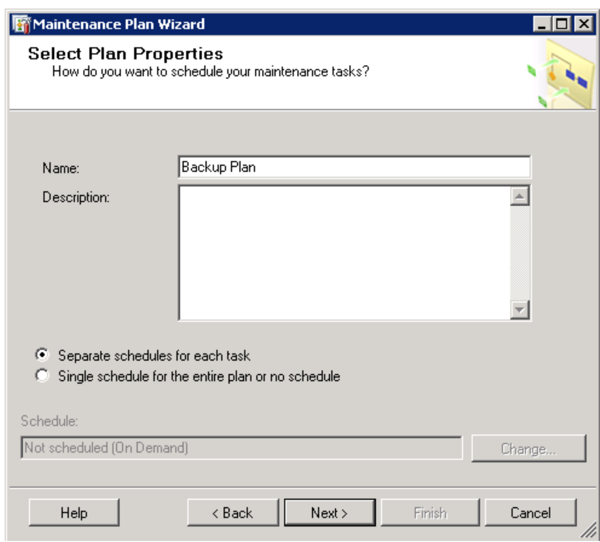
- ☐ Right click on Maintenance Plans and use the wizard to create separate plans for Backup Database (Full), Backup Database (Transaction Log).
- ☐



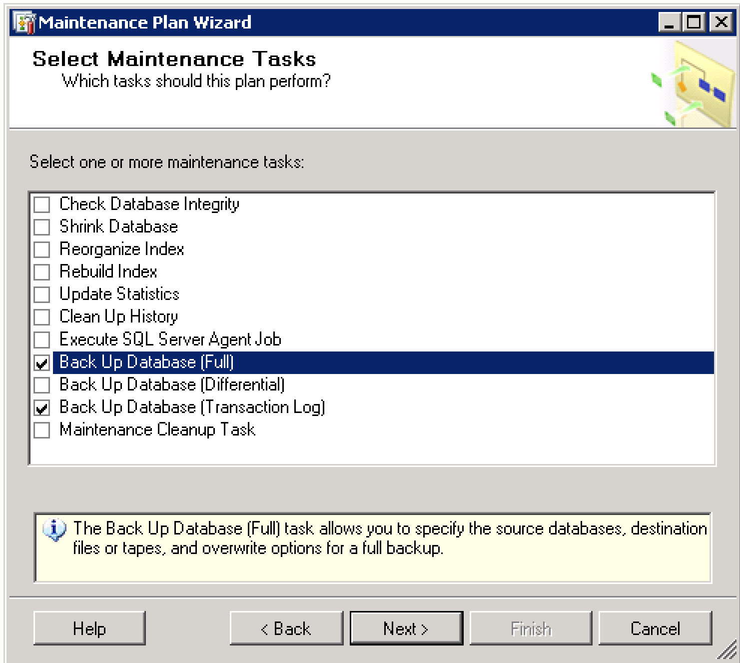
☐

- Specifications on how to set up each plan follow.

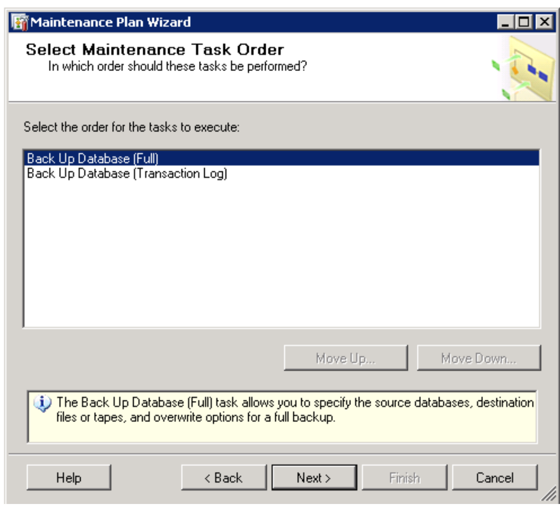
- ☐ Give your Backup Plan a name choose separate schedules for each task and Next.



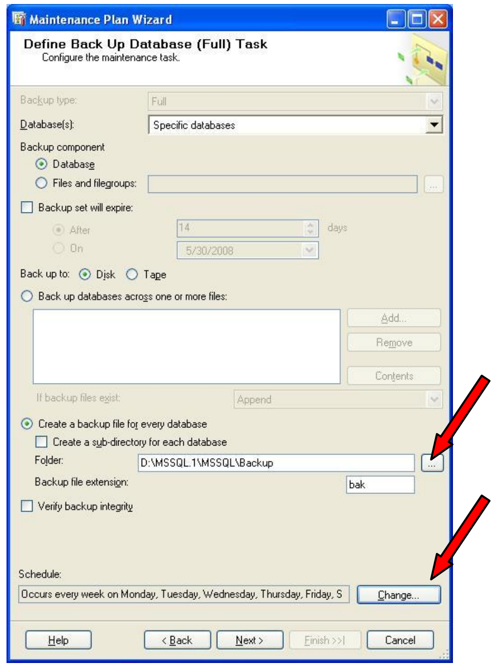
☐ From the list, select Back Up Database (Full) and Back Up Database (Transaction Log).



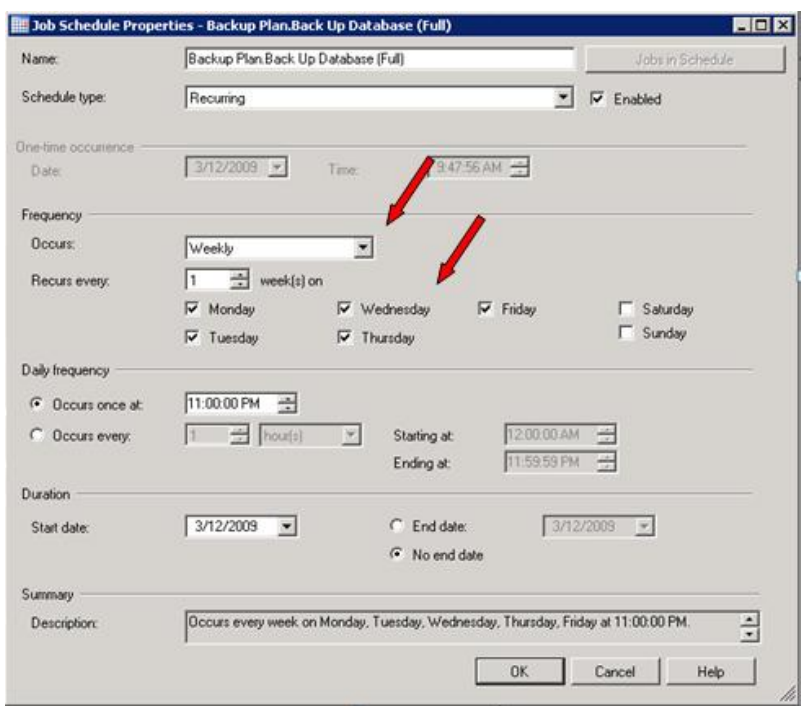
☐ Verify the tasks and Next.



☐ Click the drop down and select All Databases. Verify the location backup files will be saved to and then click **change** to set the schedule.

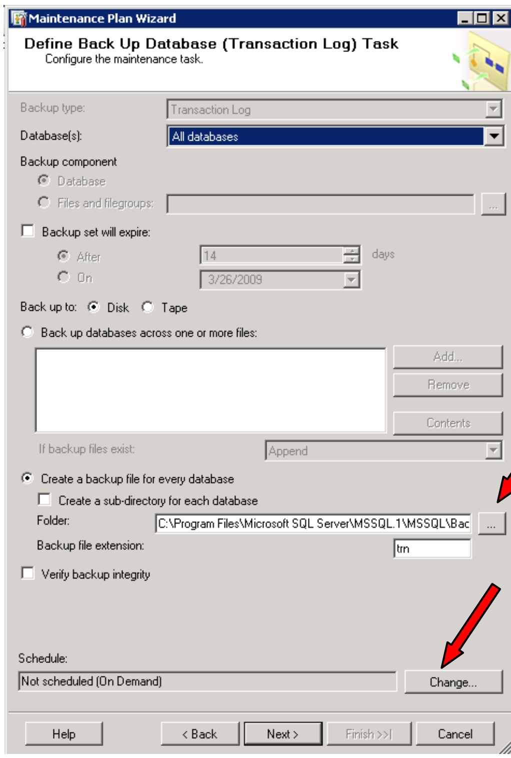


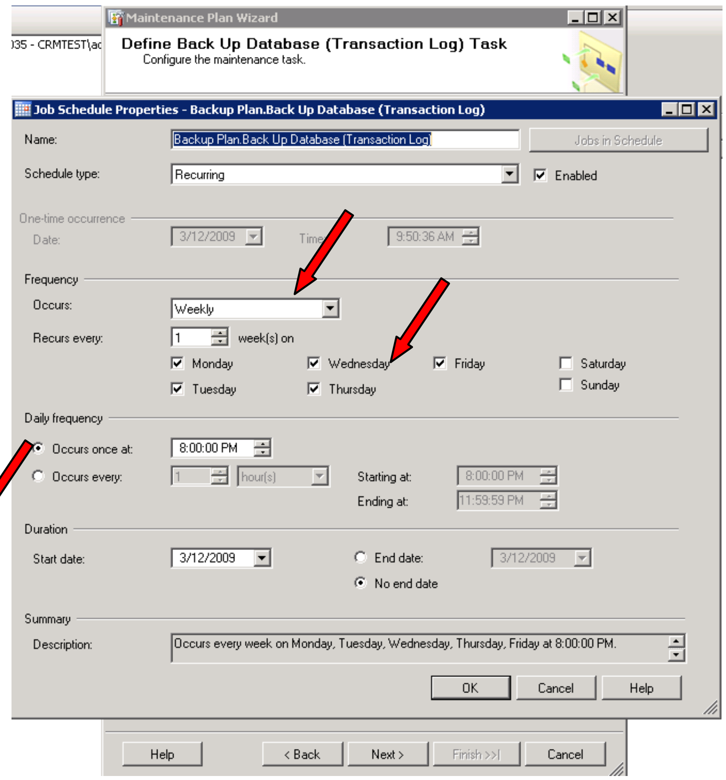
- Set the full backup to run Weekly on each weekday at 11:00 PM.



☐ The next step is setting up the Backup Database for the Transaction Log.

- The transaction log should be set to run Weekly at 8:00 PM on each weekday.

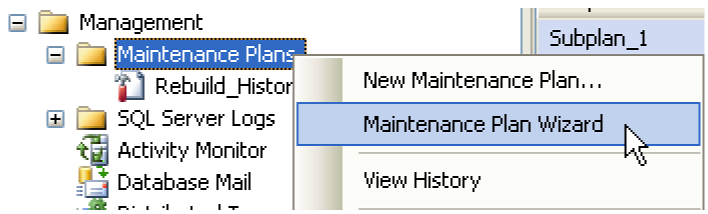




- Choose Next and then Next on the Select Report Options.
- Click Finish to Complete the Wizard and the plan will be created.

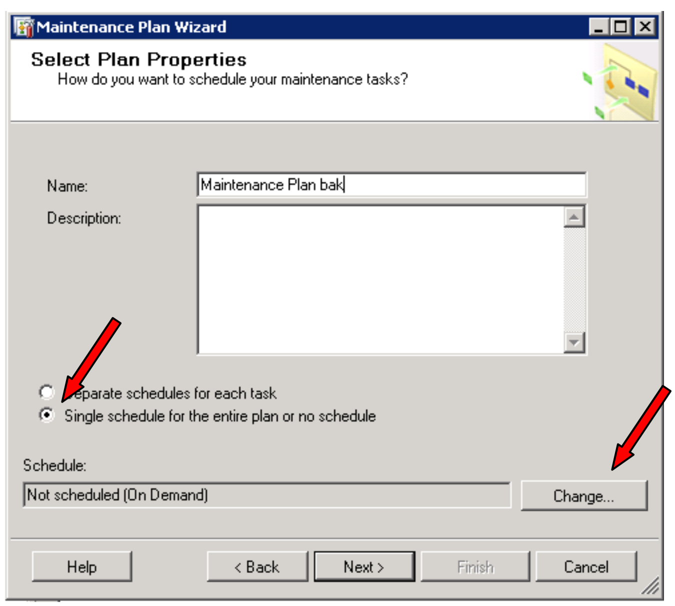
3. Setting Up Plan to Clean Up Old Backup Files (.bak)

☐ Right click on Maintenance Plans and use the wizard to create a tasks for Cleaning up old Backup files.



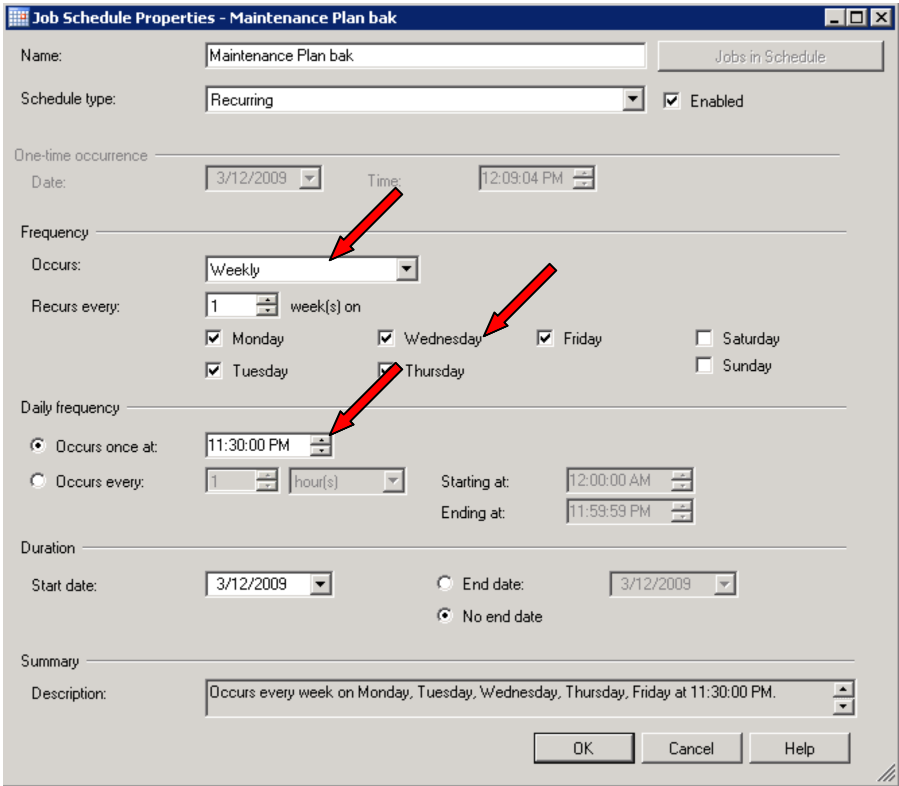
☐

- Specifications on how to set up each plan follow.

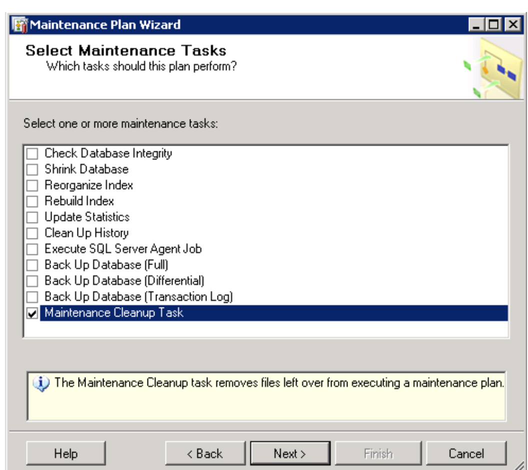


☐ Give Your Cleanup plan a name and choose Single schedule for the entire plan or no schedule.

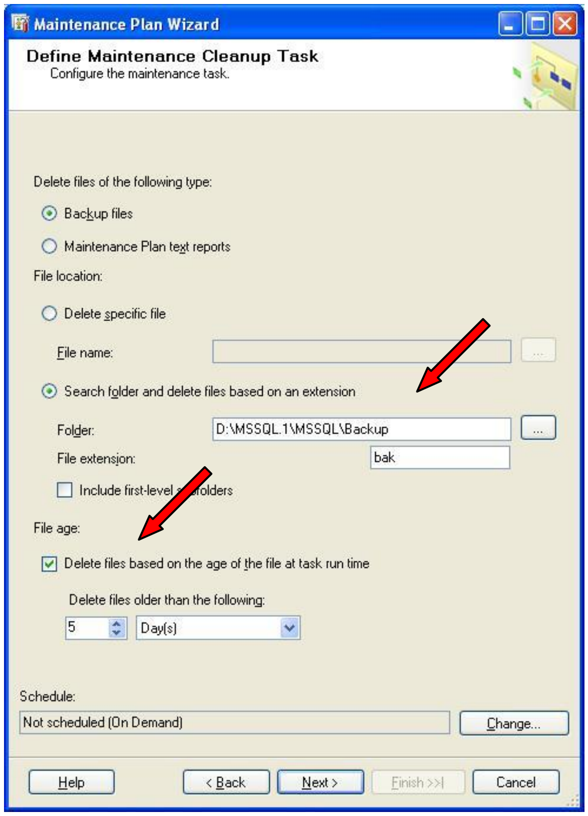
- Then choose Change on this screen and set the schedule to run Weekly on each weekday at 11:30pm. Then OK and Next.



☐ Choose the task – Maintenance Cleanup Task and Next and the Next on the Task Order.



☐ The Maintenance Cleanup should be set to search for files to delete in the same location the backups were placed. The file extension should be **bak** (without the dot).



- Change the delete files to older than 5 days depending on available drive space. Then choose Next.
- Choose Next and then Next on the Select Report Options.
- Click Finish to Complete the Wizard and the plan will be created.

4. Maintenance Cleanup Plan for Old Transaction Logs (.trn)

☐ The next task is to create a plan to clean up old transaction log backups. Use the same steps as were used for cleaning up old backup files with following changes:

- Give the task a unique name
- The file extension to delete is **trn** (without the dot).
- Set files to be deleted to older than 5 days depending on available drive space.
- Set the task to run Weekly at 11:45 PM on each weekday.

Appendix B – Pre-implementation Needs

Below is a list of questions and items customers need to review before implementation begins. This will help ensure that implementation is smooth and no last minute issues arise.

- ☐ List of all Schools including their Id Number
  - What is each sites charge policy; allow charges, no charges, or meals only. Also the charge amount limit, if applicable?
- ☐ List of all Cashiers and Managers by Site
- ☐ List of all Central Office Staff
- ☐ Create a list of all items served:
  - Include price by grade and status
  - Note any sales restrictions that may apply
  - Which Schools/Cashiers should have access to this item?
  - Note the nutrition code that applies:
    - 1 = Federal Reimbursable Meal
    - 2 = Second Meal
    - M = Milk
    - V = Vegetable/Fruit
    - P = Protein
    - B = Bread
    - X = A la Carte
    - RS = Reimbursable Snack
    - SM = Special Milk
- ☐ Can information be pulled from and existing system which contains students and current status? How will we access this information?

- Is the student's current balance available in this database?
- Are their pictures available for use in Meals Plus?
- What do student's use for serving#, randomly assigned number or their SASI number?

☐ Where will Meals Plus import student information from, how often, etc.?

☐ If LPP is being used, what is the start date for www.LunchPrepay.com?

☐ Are any input devices going to be used for Point of Sale? If so, what type of device by school and which sites?

☐ Who will be our point of contact during the roll out, name, phone number, email address?

☐ Site Access to www.mealsplus.com for automatic updates. Files downloaded will include txt, exe, dll, ocx, doc, chm, and pdf.

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