
PrimerEdge

System Administration
Manual

CYBERSOFT

PrimerEdge

Cybersoft TECHNOLOGIES

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PrimeroEdge Food Service Solutions PrimeroEdge System Administration Manual

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Chapter 1:

General Information

In this chapter you will learn:

- ✓ Basics about PrimeroEdge System
- ✓ How to use this manual

Introduction

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

The PrimeroEdge application provides the School Food Services Department with a technology infrastructure to improve the quality of service and simplify the process of meal accounting and reporting. This versatile software addresses the challenges faced in day-to-day operations with simple to use screens and user-friendly navigation tools.

Key Features

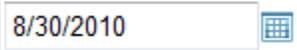
- **Point of Service** – provides control and management of services offered in the school cafeteria, including:
- **Free & Reduced Eligibility** – provides scanning, processing, and organizing Free and Reduced Eligibility applications including:
- **Financials** – provides creation and management of General Ledger entries and accounts, views of journal entries and accounts, and generation of financial statements, balances and reports.
- **Inventory** – provides site and district warehouse inventory control, management and ordering including:
- **Temperature Tracker** – provides monitoring of various cooling systems for compliance with safety cooling standards including:

How to Use This Manual

Icons used in this manual include:

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

Special functions used in this manual include:

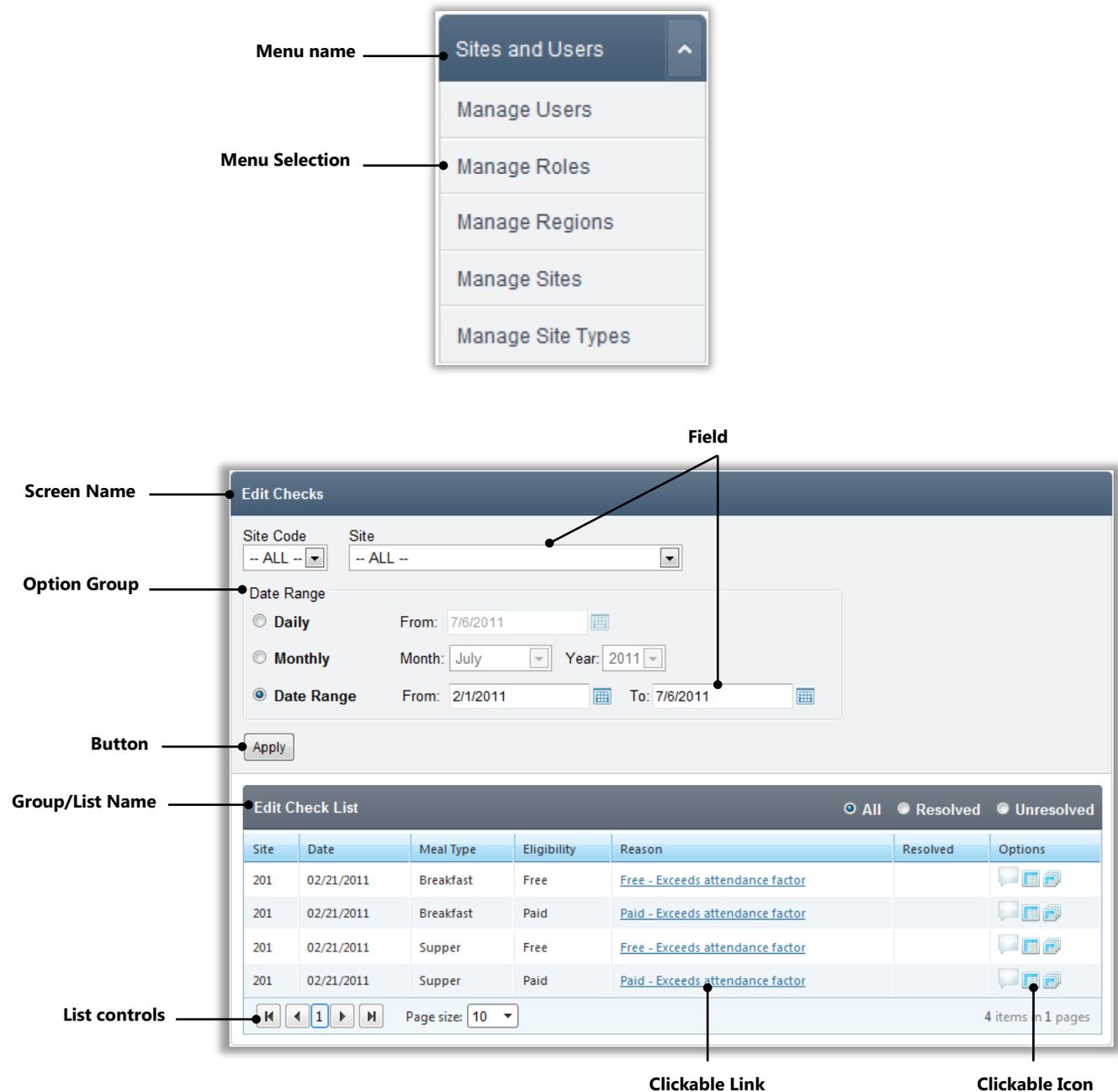
When you see...	You can...
	Place the cursor in a date section, such as Month, and click the  key to increase the number or click the  key to decrease the number.

Style conventions used in this manual include:

Item	Convention	Example
Window name	<i>Italics, title caps</i>	In the <i>Report Viewer</i> window, click...
Screen name	<i>Italics, title caps</i>	On the <i>Create Orders</i> screen...
Group name	Bold, capitalization as seen on screen	In the Delivery Information group... In the Vendor Information group...
Field name	<u>Underlined</u> , capitalization as seen on screen	In <u>Vendor</u> , select a vendor. In <u>Comments</u> , enter comment text.
Message	<i>"Italics, enclosed in quotes, capitalization as seen on screen"</i>	<i>"This is a new unsaved order."</i>
Button	Graphic as seen on screen	Click  . Click  .
Menu name	Bold, title caps	The Orders menu is...
Menu selection	Bold, capitalization as seen on screen	Select View/Modify Orders . The View/Modify Orders selection...

Item	Convention	Example
Key names, key combination, and key sequences	Small caps	TAB key ENTER key
Clickable hyperlink	<i>Blue, bold, italics, underlined</i>	Click the BatchNumber in the <u>Batch #</u> column.
Clickable icon	Icon name followed by graphic	Click Delete ().

Menus and screens offer:



The screenshot shows a software interface with several annotated components:

- Menu name:** Points to the 'Sites and Users' header of a dropdown menu.
- Menu Selection:** Points to the 'Manage Roles' option within the dropdown menu.
- Screen Name:** Points to the 'Edit Checks' title bar of a window.
- Option Group:** Points to the 'Date Range' section of the form.
- Field:** Points to the 'Site' dropdown menu.
- Button:** Points to the 'Apply' button.
- Group/List Name:** Points to the 'Edit Check List' title bar.
- List controls:** Points to the navigation and pagination controls at the bottom of the list.
- Clickable Link:** Points to a blue underlined text link in the 'Reason' column of the table.
- Clickable Icon:** Points to a trash icon in the 'Options' column of the table.

How to Use List Display Controls

The screenshot shows a 'Manage Users' interface. At the top, there are filters: 'Site: All; Role: All; Status: Active'. Below the filters are links for 'Add User' and 'Import User'. The main area is a table titled 'Users' with columns: 'User Name', 'First Name', 'Last Name', 'Email', 'User Status', and 'Roles'. The table lists several users, including Adeline, Amanda, Anita, Angela, Aimee, Anna, Arlene, Barbara, and Beverly. At the bottom of the table, there are navigation and display controls: a set of buttons for first, previous, page numbers (1-10), next, and last; a 'Page size:' dropdown menu set to '10'; and a status indicator '133 items in 14 pages'.

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

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

To use the list display controls

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

Chapter 2:

Dashboard

In this chapter you will learn how to:

- ✓ Identify the PrimeroEdge icon and login
- ✓ Access the Dashboard

Open PrimeroEdge



On your desktop:

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

The web login screen appears.

Login

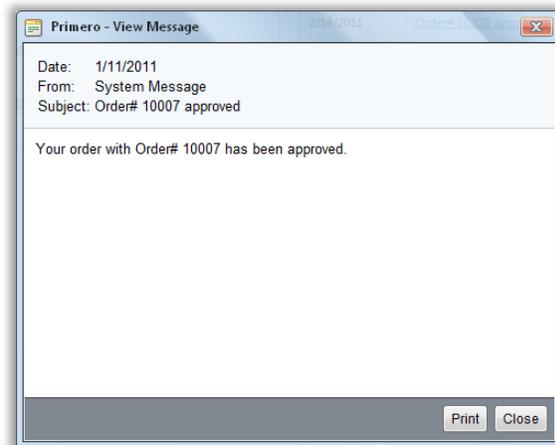
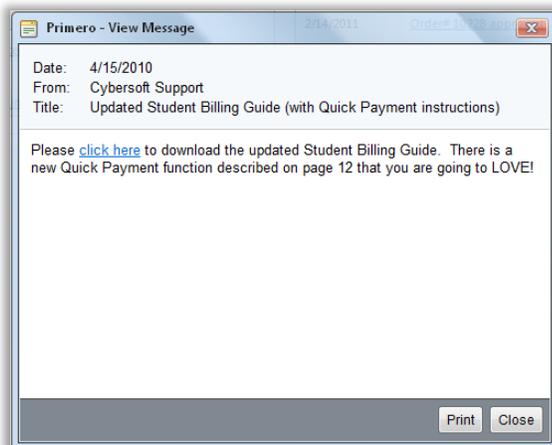
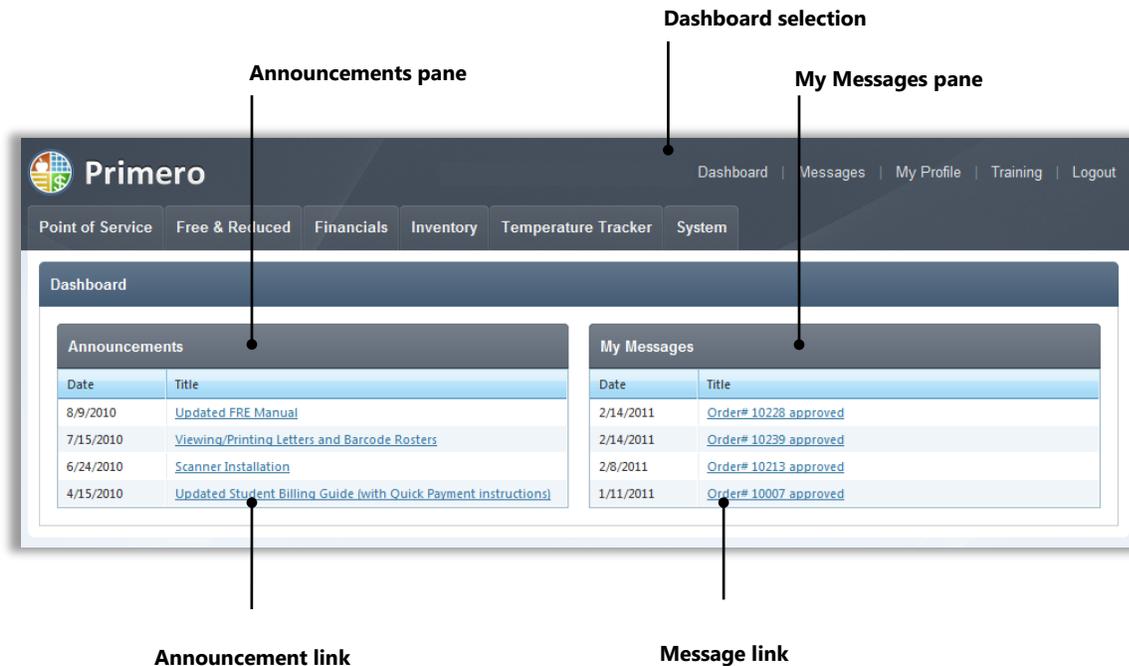
A screenshot of the Primero Login web page. The page has a dark blue header with the text "Primero Login" in white and a small circular logo on the right. Below the header, there are two input fields: "Username" and "Password". Below the "Password" field is a "Login" button.

On the *Primero Login* screen:

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

Dashboard

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



The Dashboard offers two panes:

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

Clicking a link in the **Title** column in either pane displays the **View Message** dialog.

Navigate to System

When you log in to Primero you see one or more food services modules from Cybersoft Technologies that your district has chosen to use. You will see one tab for each module.

To access the System module

- Click the **System** tab.

The *System Home* screen lists four (4) menus in the vertical menu navigation bar on the left of the screen.



Note: When you log on with your username and password, you may see a subset of the menus shown above. Also, you may not see all menu selections that are shown in this manual. The menus and functions that you have access to are those appropriate for your role with PrimeroEdge.

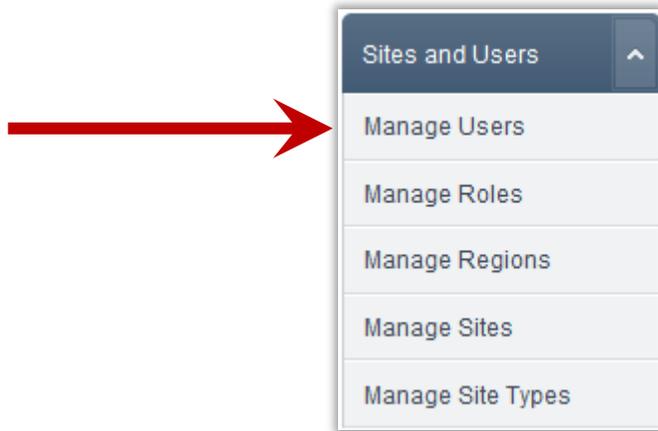
Chapter 3:

[System] Sites and Users

In this chapter you will learn how to:

- ✓ Create user names
- ✓ Update user profiles
- ✓ Activate and de-activate user names
- ✓ Import a file of user names
- ✓ Create user roles
- ✓ Change permissions set up for a user role
- ✓ Create regions or districts
- ✓ Manage regions or district details
- ✓ Create sites
- ✓ Manages site details
- ✓ Create site types
- ✓ Manage site type details

Topic: Manage Users



Manage Users imports a file of user names or adds an individual name for a user(s) of PrimeroEdge modules.

Manage Users

Site: All; Role: All; Status: Active

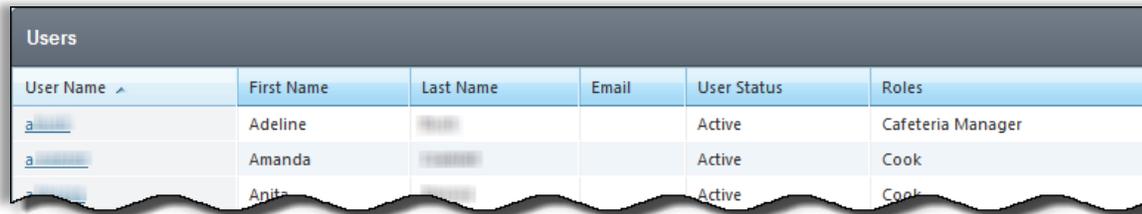
[Add User](#) [Import User](#)

User Name	First Name	Last Name	Email	User Status	Roles
a	Adeline	...		Active	Cafeteria Manager
a	Amanda	...		Active	Cook
a	Anita	...		Active	Cook
a	Angela	...		Active	Cook
a	Amanda	...		Active	Cook
a	Aimee	...		Active	Cook
a	Anna	...		Active	Cook
a	Arlene	...		Active	Cook
b	Barbara	...		Active	Cook
b	Beverly	...		Active	Cook

Page size: 10 131 items in 14 pages

On the *Manage Users* screen:

- By default, user names are sorted by user name.
-  expands the display to show search conditions

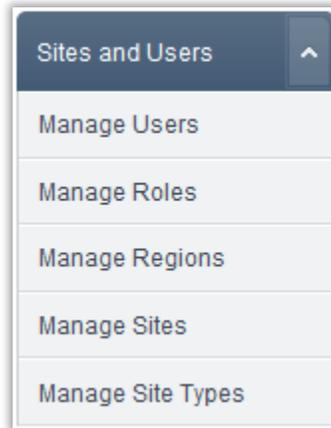
Users Listings


User Name	First Name	Last Name	Email	User Status	Roles
a...	Adeline	...		Active	Cafeteria Manager
a...	Amanda	...		Active	Cook
a...	Anita	...		Active	Cook

Each listing in **Users** includes:

Header Name	Sortable	Description
User Name	✓	Clickable link ; complete user name assigned by district; click the UserName link to display the <i>Edit User</i> dialog; use the <i>Edit User</i> dialog to manage user name details
First Name	✓	<i>View only</i> ; user's given name
Last Name	✓	<i>View only</i> ; user's full last name
Email	✓	<i>View only</i> ; user's complete email address
User Status	✓	<i>View only</i> ; current status of User Name: <ul style="list-style-type: none"> * Active – User Name is recognized by PrimeroEdge and allowed access to sites set up in user profile. * Disabled – User Name is not recognized by PrimeroEdge; log on is not allowed.
Roles	✓	<i>View only</i> ; all user roles assigned to User Name; user roles are created through Manage Roles on the Sites and Users menu.

Displaying All User Names



On the **Sites and Users** menu:

- Click **Manage Users**.

Manage Users

Site: All; Role: All; Status: Active

[Add User](#) [Import User](#)

User Name	First Name	Last Name	Email	User Status	Roles
asmith_sch212	Alexus	Smith		Active	Inventory Manager
b...	Brian			Active	Director
b...	Barbie	Manager		Active	Secretary
cJones_sch505	Carolyn	Jones		Active	Inventory Manager
c...	Connie			Active	Cashier
cl...	Carmen			Active	Secretary
c...	Cindy			Active	Cashier
d...	Debbie			Active	Cashier
d...	Dave			Active	Cashier
d...	Debbie			Active	Central Office

Page size: 10 37 items in 4 pages

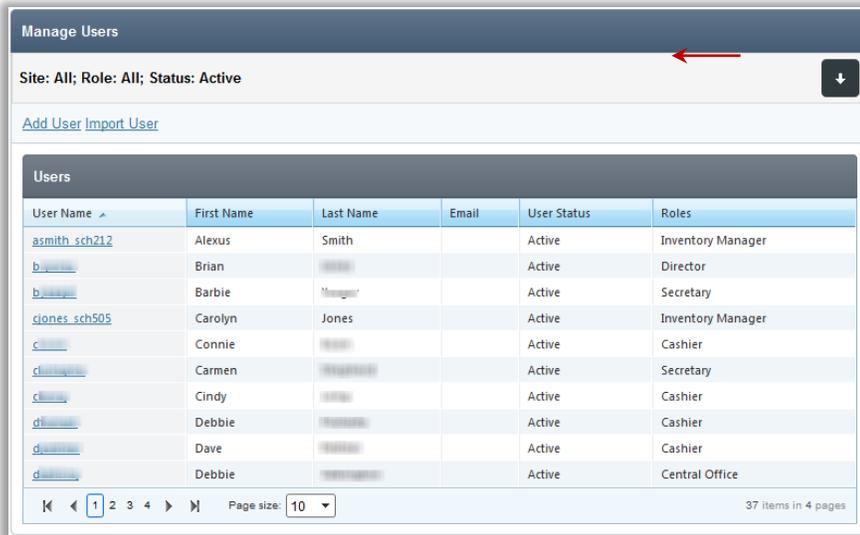
All user names are listed in alphabetical order.

User name listings may be displayed on multiple pages.

Searching for a User Name

On the *Manage Users* screen:

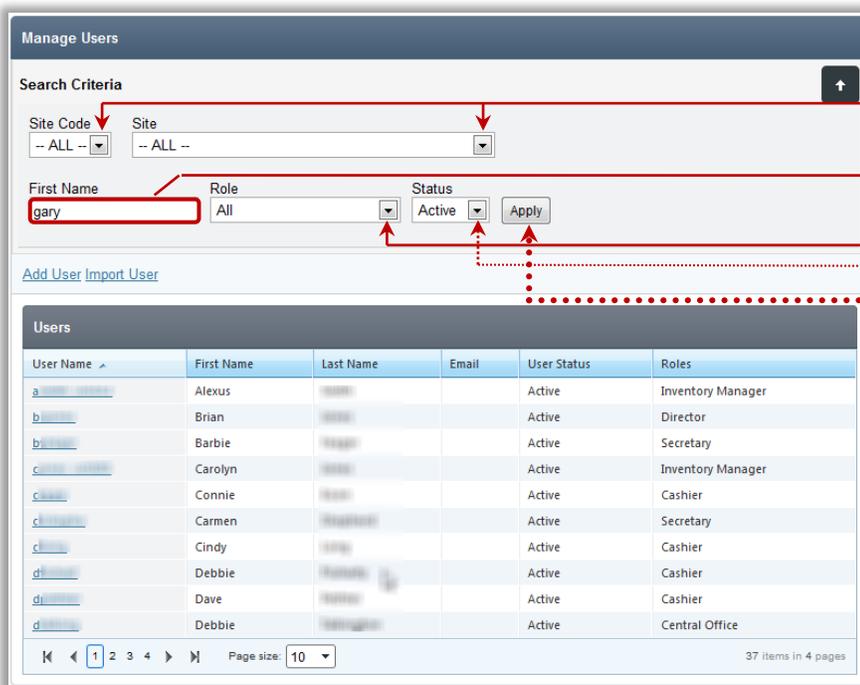
- Click  to display search conditions.



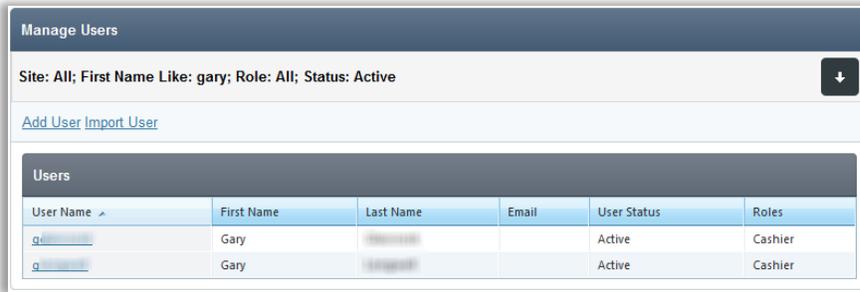
The screenshot shows the 'Manage Users' interface. At the top, it displays 'Site: All; Role: All; Status: Active' with a dropdown arrow on the right. Below this are links for 'Add User' and 'Import User'. A table lists users with columns for User Name, First Name, Last Name, Email, User Status, and Roles. At the bottom, there are navigation controls and a page size selector set to 10, with a note '37 items in 4 pages'.

In **Search Criteria**:

- In **Site Code** and **Site**, select a site code or site name.
- In **First Name**, enter a complete or partial first name.
- In **Role**, select a role.
- In **Status**, select a status.
- Click .

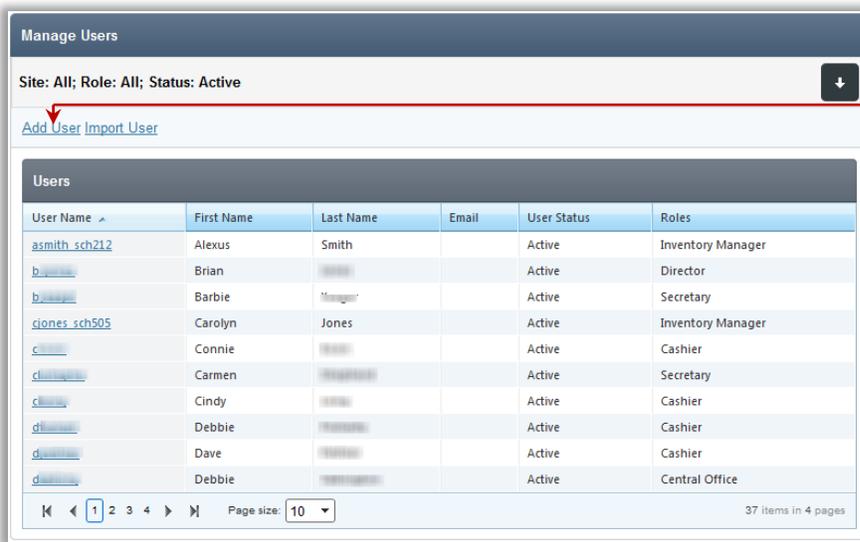


This screenshot shows the 'Search Criteria' section expanded. It includes dropdowns for 'Site Code' (set to '-- ALL --') and 'Site' (set to '-- ALL --'). There are input fields for 'First Name' (containing 'gary'), 'Role' (set to 'All'), and 'Status' (set to 'Active'). An 'Apply' button is visible. Red arrows point from the list items in the previous block to these specific fields. The user list below is partially visible, showing the same columns as the previous screenshot.



All User Name listings with the selected search conditions are displayed in the **Users** list.

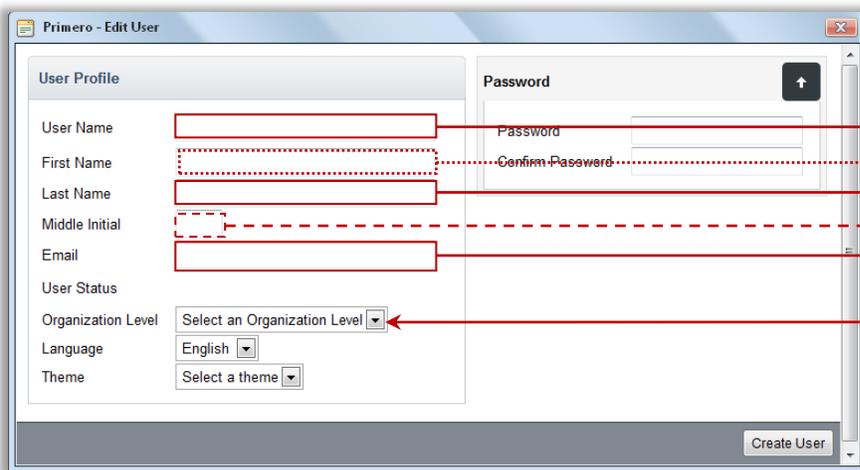
Adding a User Name



On the *Manage Users* screen:

- Click the [Add User](#) link.

In the *Edit User* dialog:

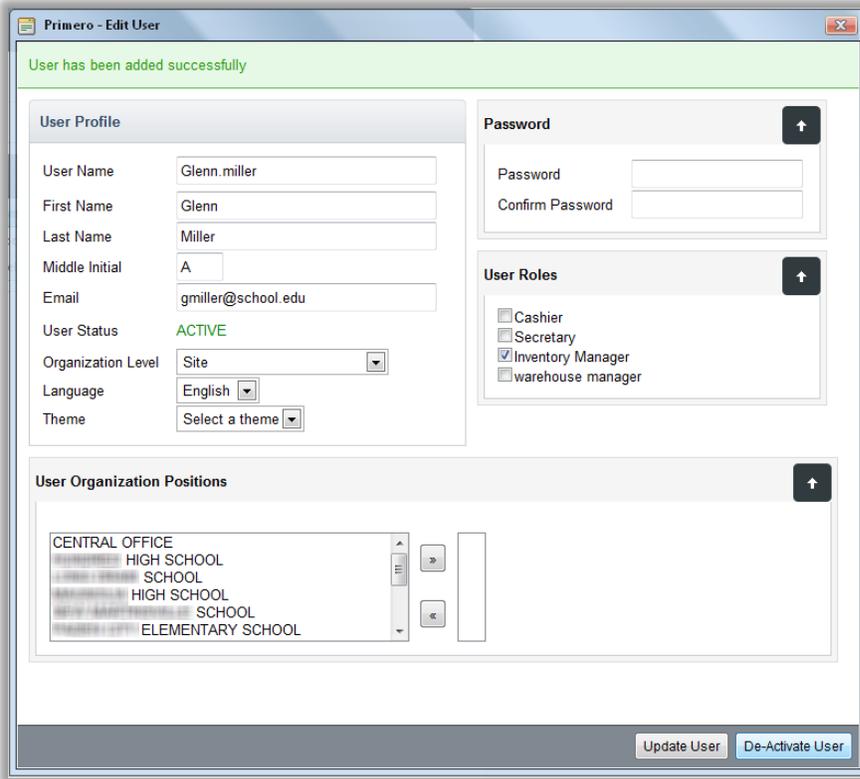


- In **User Name**, enter a complete username.
- In **First Name**, enter the user's complete first name.
- In **Last Name**, enter the user's complete last name.
- In **Middle Initial**, enter the user's middle initial.
- In **Email**, enter the user's complete email address.
- In **Organization Level**, select a level.

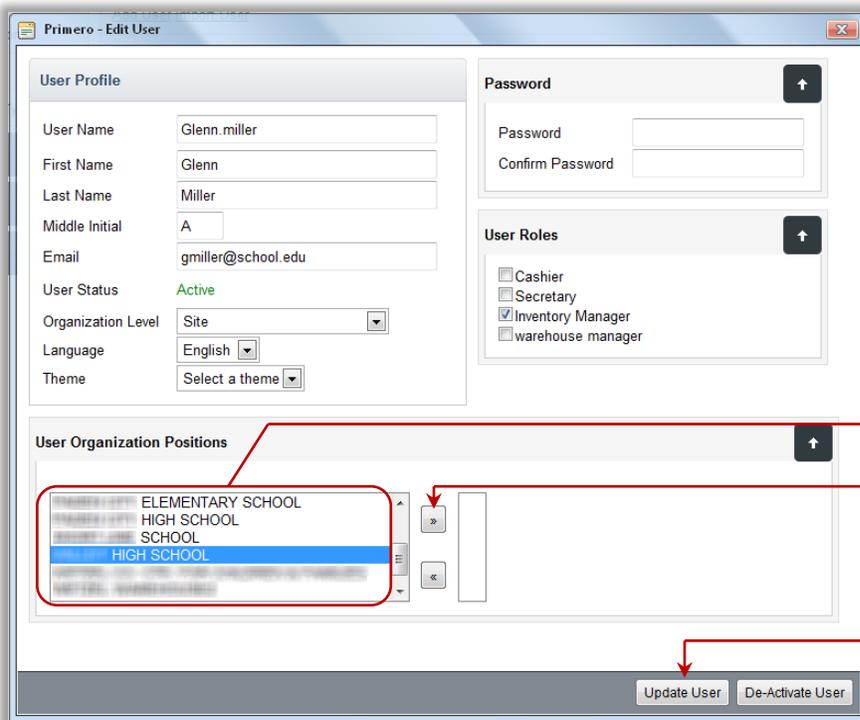
The **User Roles** group appears and includes user functions that correspond to the selected organization level.

- In **User Roles**, select one or more roles (add check mark).
- In **Language**, accept English or select a language.
- In **Theme**, select a theme.

- In **Password**, enter a password to associate with the User Name.
- In **Confirm Password**, re-enter the password.
- In **User Roles**, select one or more user roles to set up permissions (add check marks).
- Click .

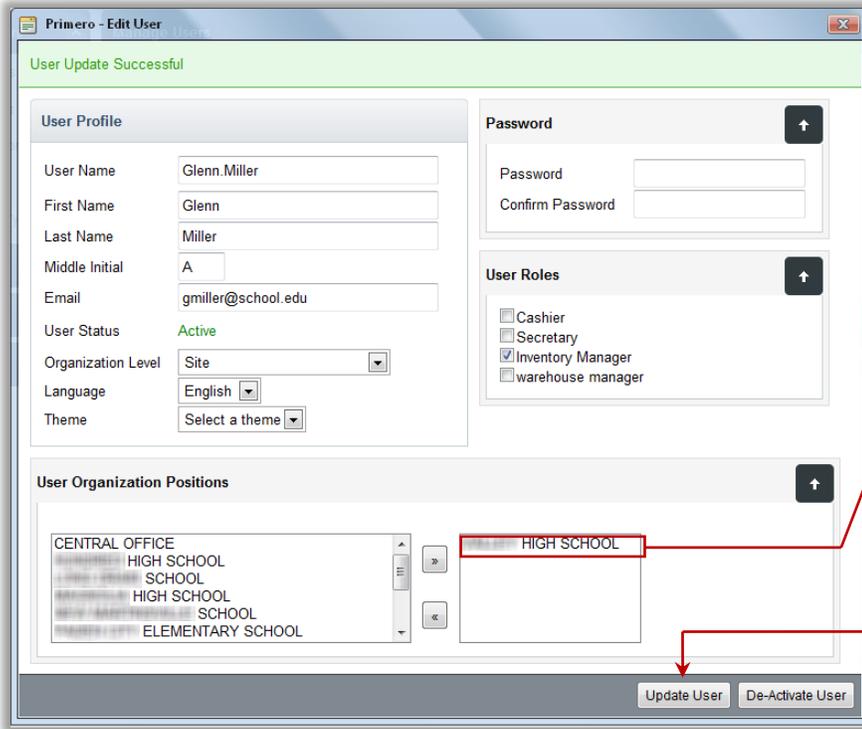


A success message appears.



In the **User Organization Positions** group:

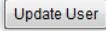
- In the list of sites:
 - ★ Select a site.
 - ★ Click **Move To** () to add the site to the list of organizations the user name is allowed to view.
- Click  .



The selected site is moved to the list of allowed sites.

- Add more sites as needed.
- Remove a site by selecting the site in the allowed sites list and click .

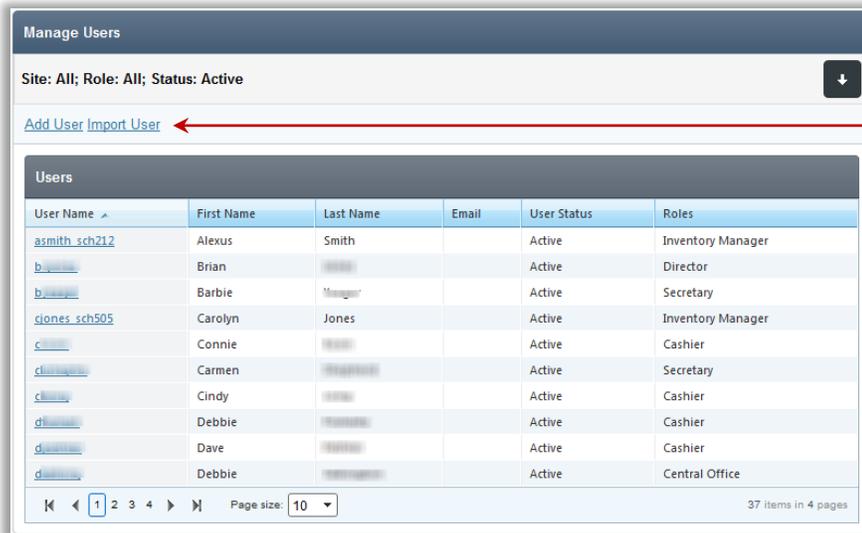
When all sites are listed:

- Click .

An update success message appears.

- Click **Close** () to close the *Edit User* dialog.

Importing a User Name File



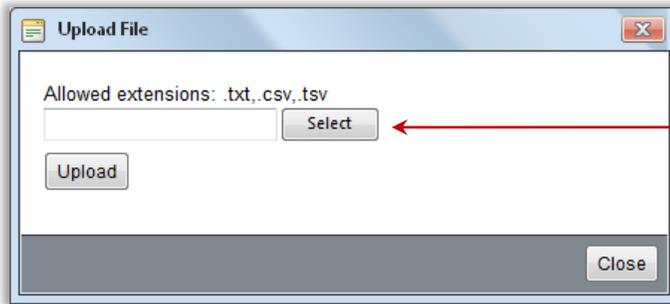
On the *Manage Users* screen:

- Click the [Import User](#) link.



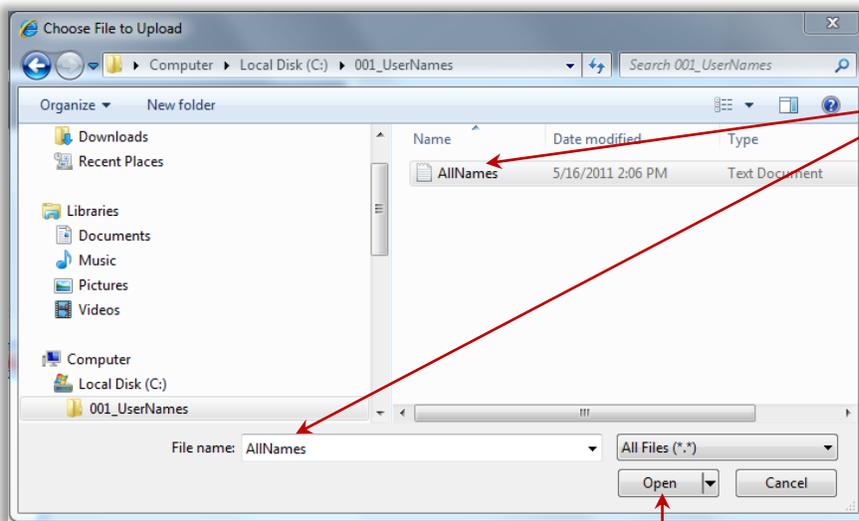
On the *Import Users* screen:

- Click .



In the *Upload File* dialog:

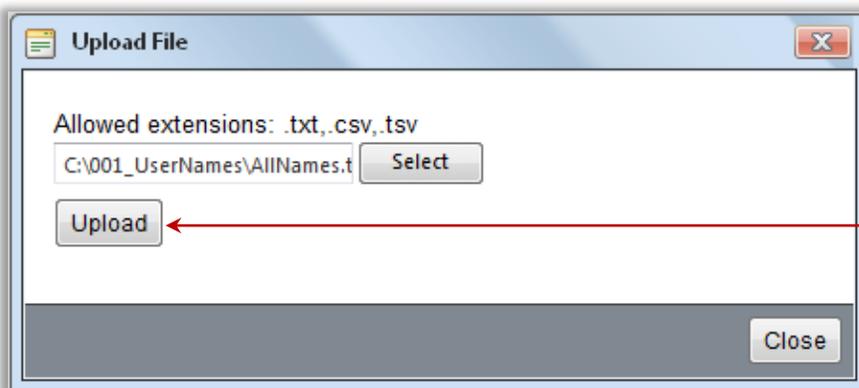
- Click .



In the *Choose File to Upload* dialog:

- Use standard Windows navigation techniques to select the file to upload.

- Click .



In the *Upload File* dialog:

- Click .

On the *Import Users* screen:

- Click **Preview** to determine how the file names will import.
- Click **Import** to import the names.

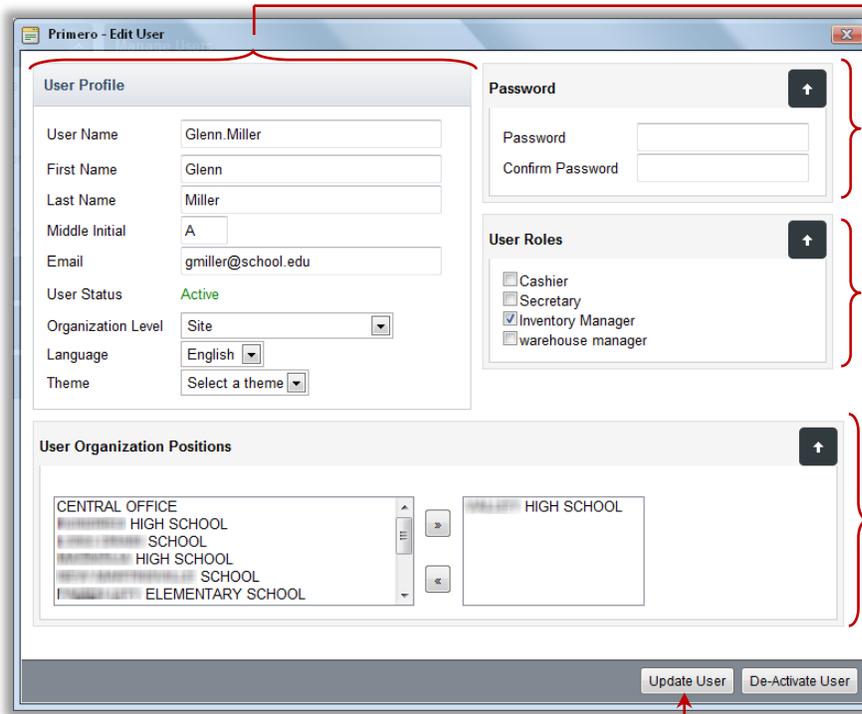
Changing a User Profile

User Name	First Name	Last Name	Email	User Status	Roles
g...	Ed	...		Active	Cashier
g...	Gary	...		Active	Cashier
Glenn.miller	Glenn	Miller		Active	Inventory Manager
g...	Gary	...		Active	Cashier
GWilliams_Sch005	George	Williams		Active	Inventory Manager
h...	Helen	...		Active	Superintendent Secretary
j...	JoAnna	...		Active	Secretary
j...	Jeff	...		Active	Cashier
j...	Jeff	...		Active	Cashier
j...	JoBeth	...		Active	Secretary

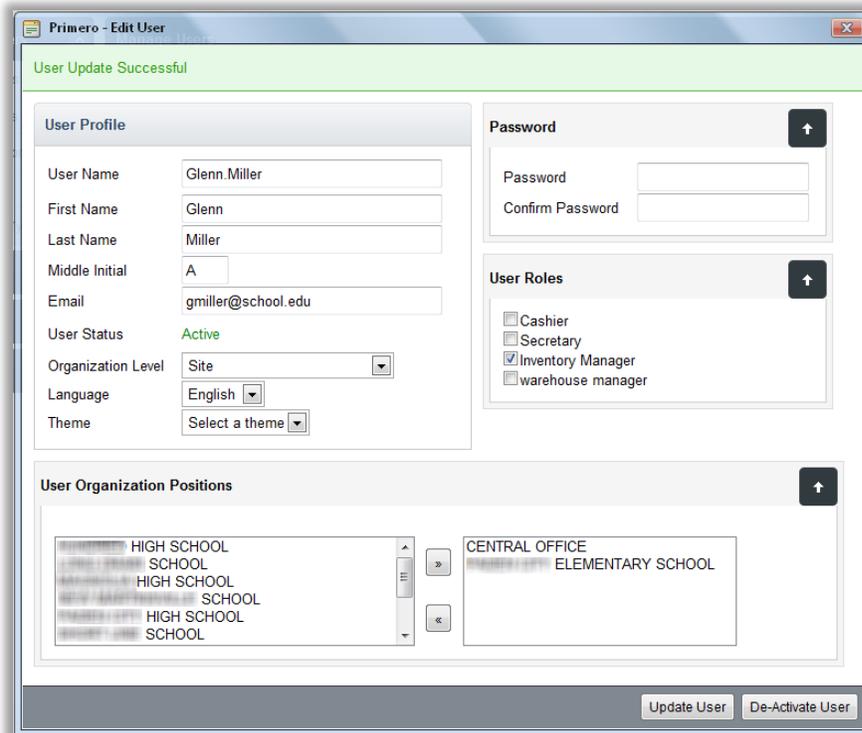
On the *Manage Users* screen:

- Use the Search Criteria or list display controls to display a User Name to change.
- Click the [UserName](#) link to display the *Edit User* dialog.

In the *Edit User* dialog, do one or more of the following:

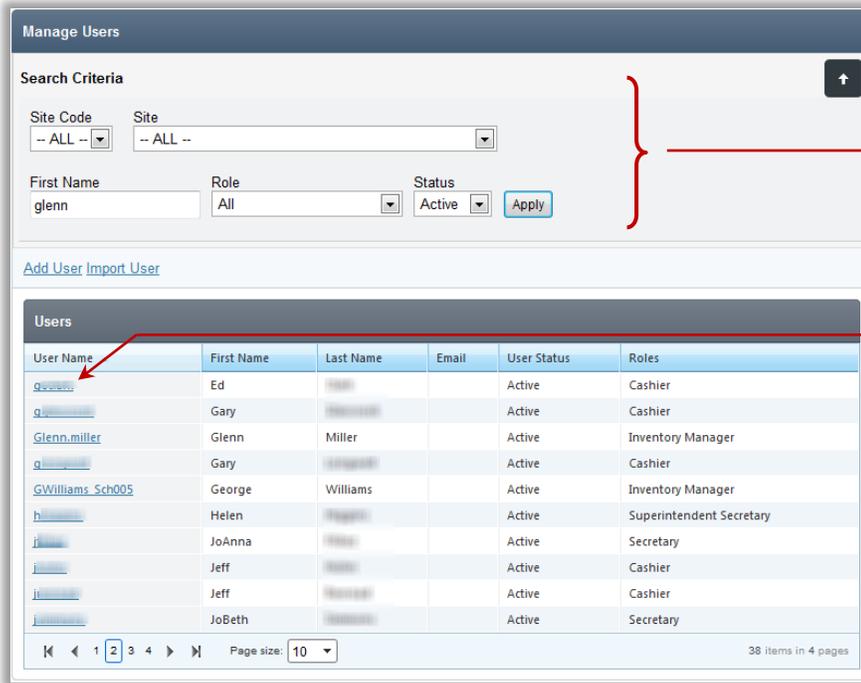


- In the basic profile information, make changes to the user name, email, or other information as needed.
- In **Password**, enter a new password to override the existing password.
- In **User Roles**, select or clear user roles, as needed.
- In **User Organization Positions**, add or remove allowable sites, as needed.
- Click  .



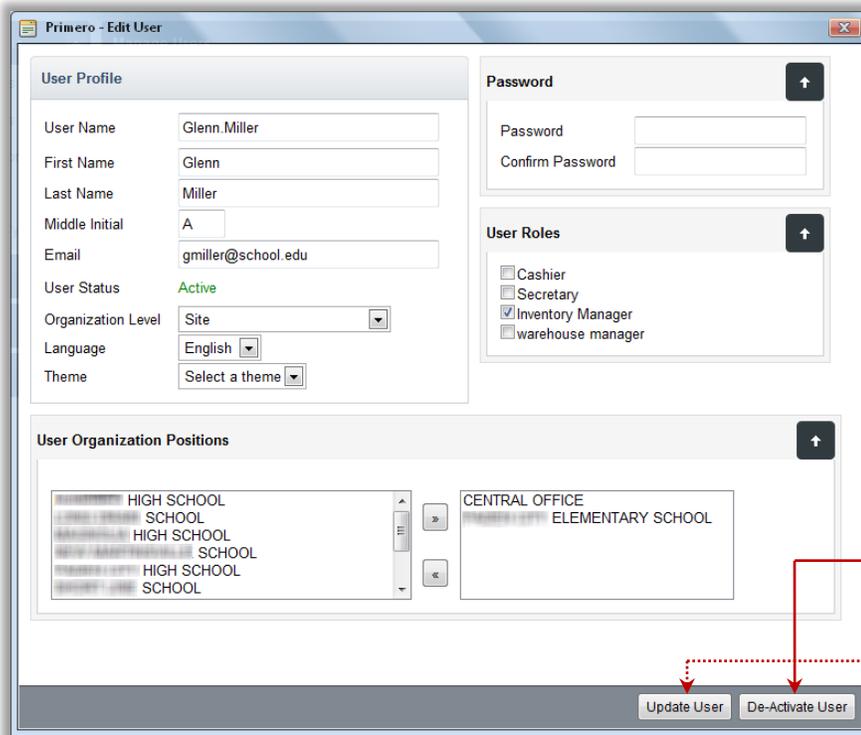
- A success message appears.
- Click **Close** () to close the *Edit User* dialog.

De-Activating a User Name

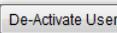
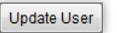


On the *Manage Users* screen:

- Use the Search Criteria or list display controls to display a User Name to change.
- Click the [UserName](#) link to display the *Edit User* dialog.



On the *Edit User* dialog:

- Click  .
- Click  .

Primero - Edit User

User Profile

User Name: Glenn.Miller
First Name: Glenn
Last Name: Miller
Middle Initial: A
Email: gmiller@school.edu
User Status: **INACTIVE**
Organization Level: Site
Language: English
Theme: Select a theme

Password

Password:
Confirm Password:

User Roles

Cashier
 Secretary
 Inventory Manager
 warehouse manager

User Organization Positions

High School SCHOOL
High School SCHOOL
High School SCHOOL
High School SCHOOL
High School SCHOOL

CENTRAL OFFICE
ELEMENTARY SCHOOL

Update User Activate User

“**INACTIVE**” appears in **User Status**.

- Click **Close** () to close the *Edit User* dialog.

Manage Users

Search Criteria

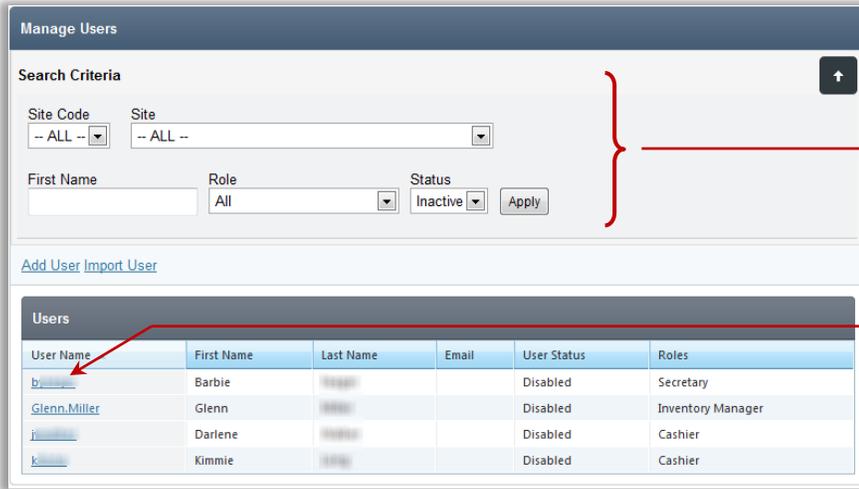
Site Code: -- ALL -- Site: -- ALL --
First Name: Role: All Status: Inactive Apply

[Add User](#) [Import User](#)

User Name	First Name	Last Name	Email	User Status	Roles
Glenn.Miller	Glenn	Miller		Disabled	Inventory Manager

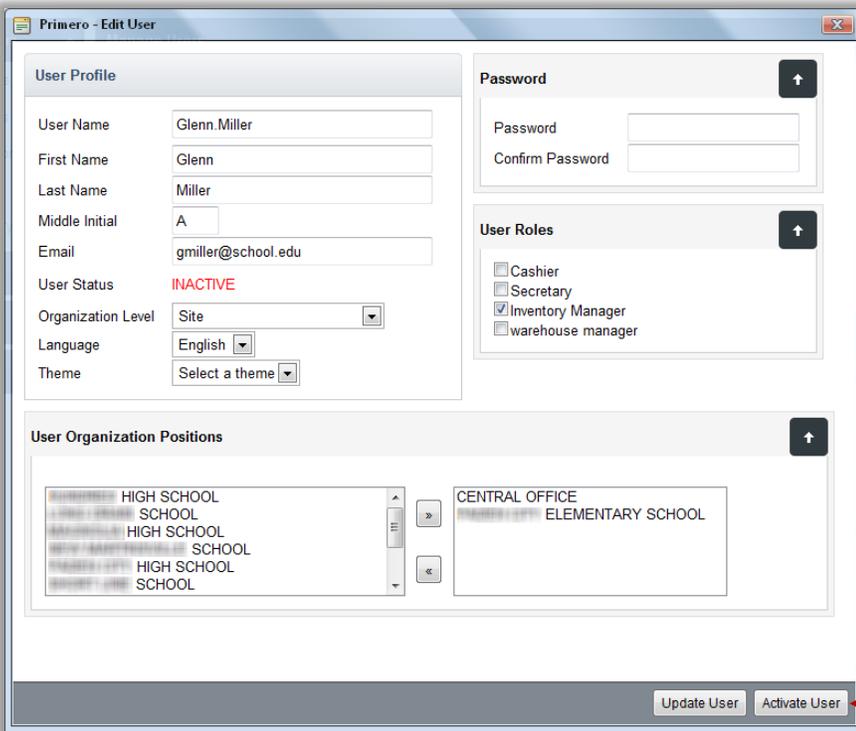
Displaying all user names with an inactive status shows the User Name disabled.

Activating a User Name



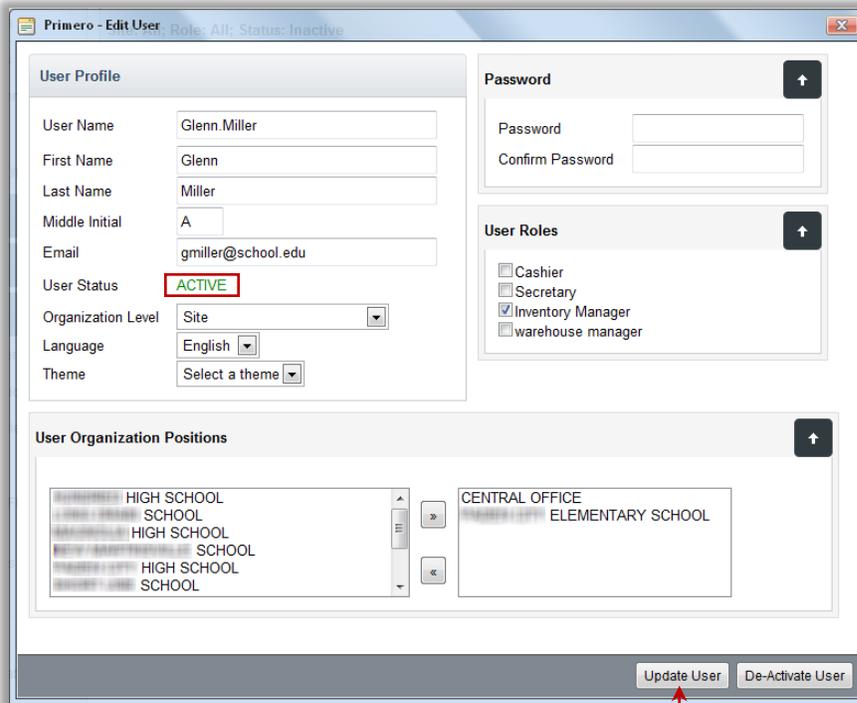
On the *Manage Users* screen:

- Use the Search Criteria or list display controls to display a **disabled** User Name to change.
- Click the [UserName](#) link to display the *Edit User* dialog.

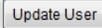


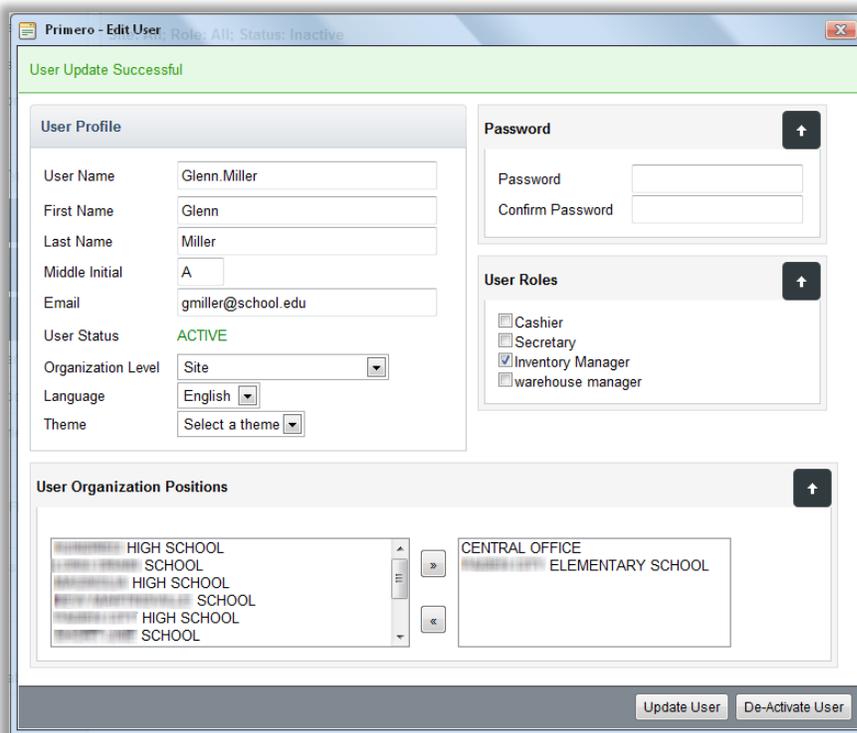
In the *Edit User* dialog:

- Click [Activate User](#).



User Status now reflects "ACTIVE".

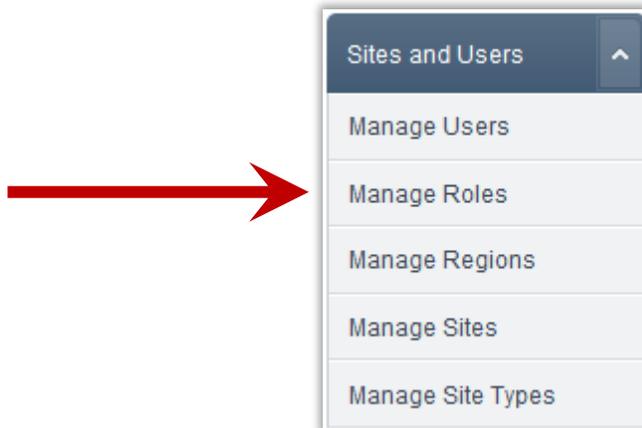
- Click  .



An update success message appears.

- Click **Close** () to close the *Edit User* dialog.

Topic: Manage Roles



Manage Roles creates and manages various templates of permissions that define which functions a role is allowed to perform or to which to have access. User roles are typically assigned to a User Name when the User Name is created.

Roles offer a quick method for setting up permissions for User Names.

Manage Roles

[Add Role](#)

Roles	
Role Description	Access Levels
Director	District
Cashier	Site
Central Office	District
Secretary	Site
Superintendent Secretary	District
Inventory Manager	Site
warehouse manager	Site

On the *Manage Roles* screen:

- By default, all existing roles are displayed with their corresponding level of access permissions.

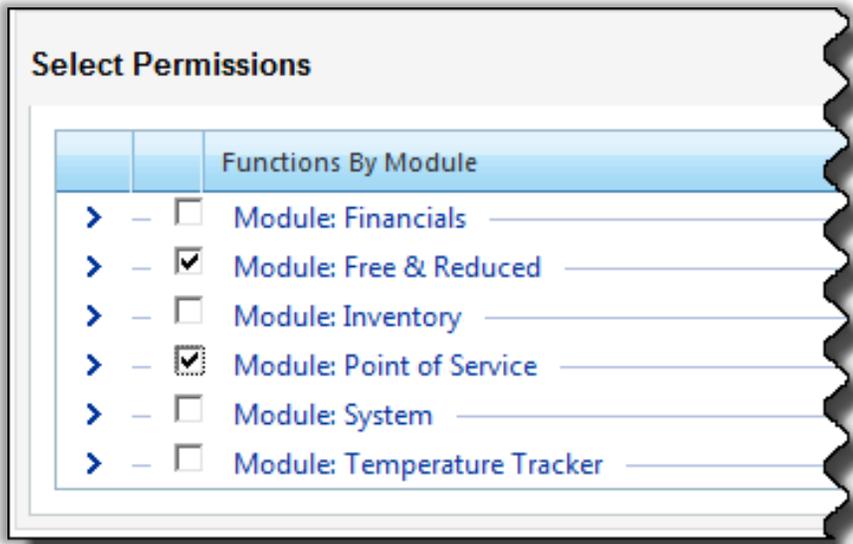
Role Types

Roles	
Role Description	Access Levels
Director	District
Cashier	Site

Each listing in **Roles** includes:

Header Name	Description
Role Description	Clickable link: role name; click to display the <i>Edit Role</i> screen; use the <i>Edit Role</i> screen to change role details, such as access to module functions
Access Levels	<p><i>View only;</i> lists the access permission level:</p> <ul style="list-style-type: none"> * District – includes ability to access all sites in the district * Region – includes ability to access all sites in the region * Site – ability to only access individual site * State – ability to access all sites in all regions/districts within the state (*West Virginia only)

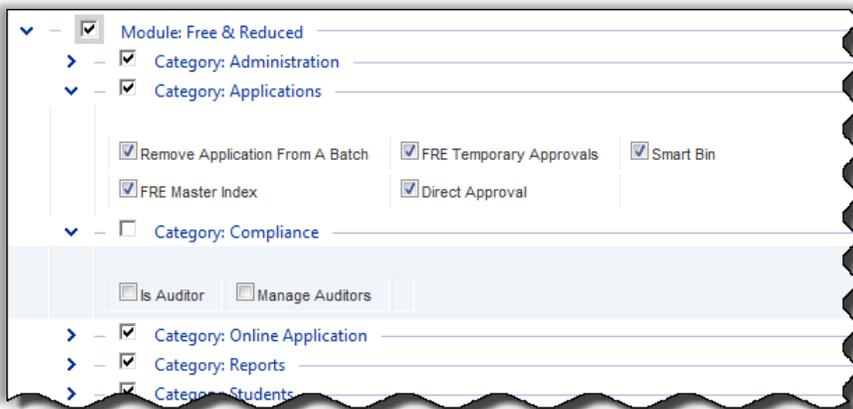
Granting Permissions



Permissions are grouped by Module.

To grant permission to all functions available in a single module, the module option is selected (add check mark).

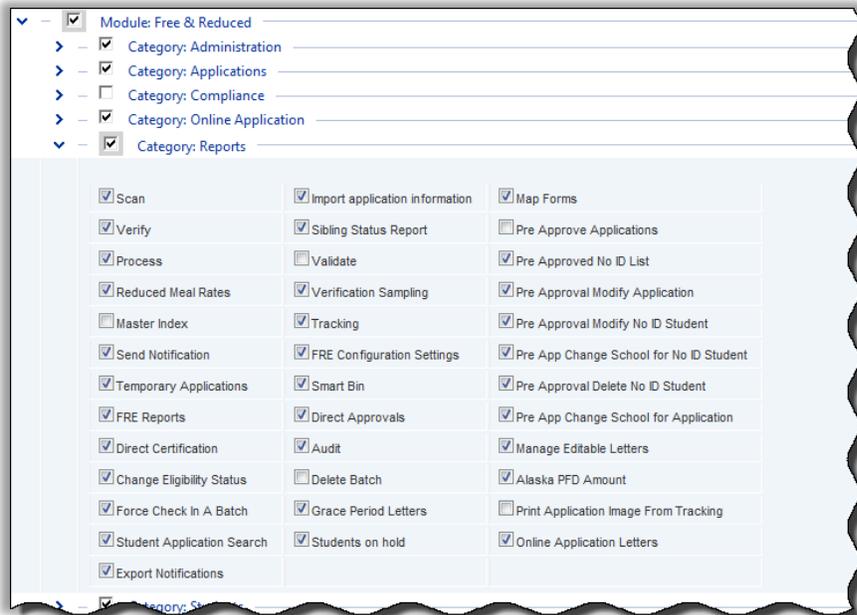
To grant permission to selected functions in the module, leave the option cleared (no check mark).



Within a Module, permissions are grouped by Category. A single category can have one or more individual functions.

To grant permission to all functions in a single category, select the Category option (add check mark).

To disallow access to all functions in a category, clear the Category option (remove check mark).



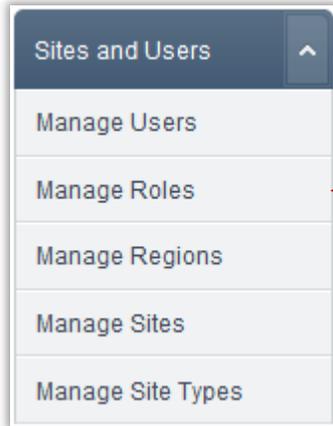
To grant permission to selected functions in a Category, select one or more individual function options (add check mark(s)). Notice that the Category option is selected (check mark applied) but has a gray outline to indicate that permission is not granted to all functions in the category.

When permission to access all functions in the Category is granted, the Category option is selected but has no gray outline.

★ NOTE

See **Appendices A-D: Module Permissions** to see descriptions of each permission option included in each PrimeroEdge Module.

Displaying Existing Roles



On the **Sites and Users** menu:

- Select **Manage Roles**.

The image shows the 'Manage Roles' screen. At the top, there is a header 'Manage Roles' and a link 'Add Role'. Below is a table with the following data:

Role Description	Access Levels
Director	District
Cashier	Site
Central Office	District
Secretary	Site
Superintendent Secretary	District
Inventory Manager	Site
warehouse manager	Site

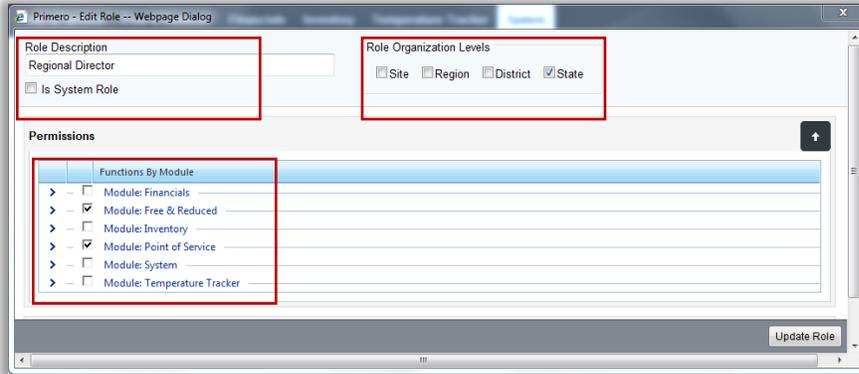
All existing user roles are listed in **Roles** with the corresponding access level.

Viewing Role Details

The image shows the 'Manage Roles' screen, identical to the previous one. A red rectangular box highlights the 'Role Description' column of the table. A red arrow points from the text on the right to the top of this box.

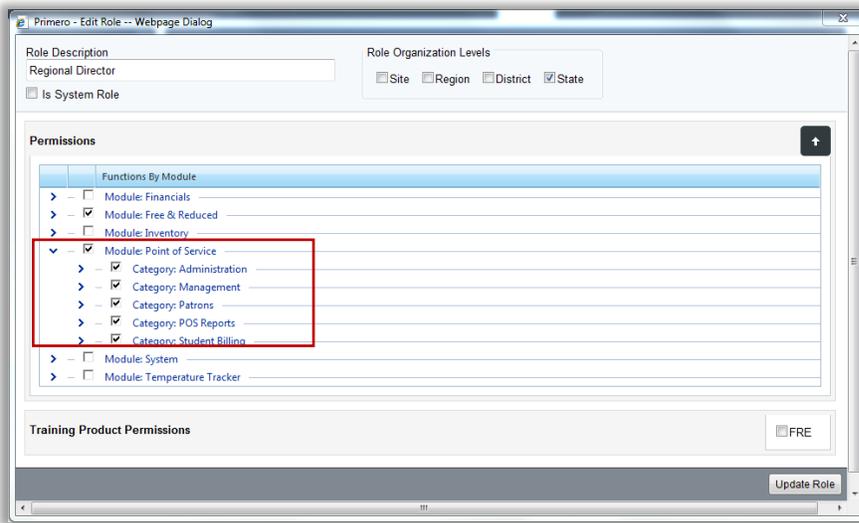
On the **Manage Roles** screen:

- Click a [RoleDescription](#) link in the **Role Description** column.

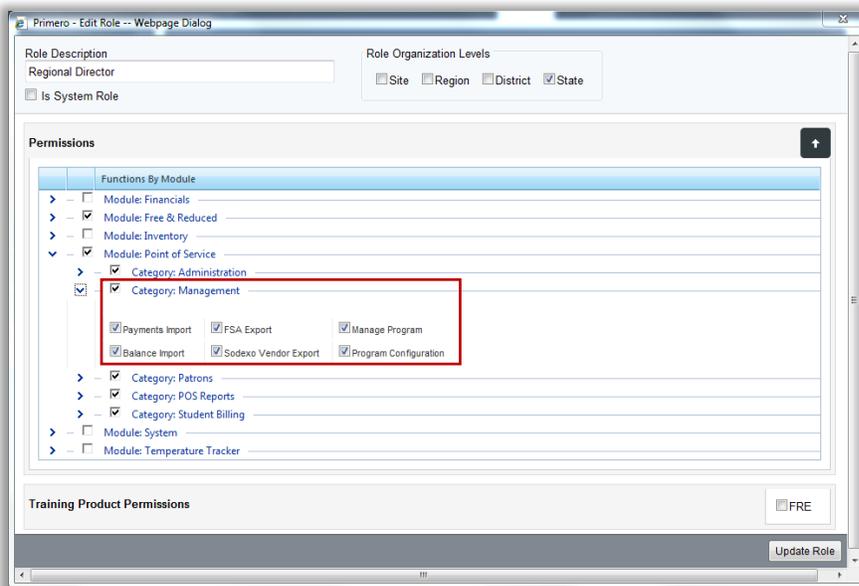


The *Edit Role* screen displays:

- Role Description
- Role Organization Levels – all enabled roles have a .
- Permissions – all enabled modules have a .



Expand an enabled module to view all enabled categories.

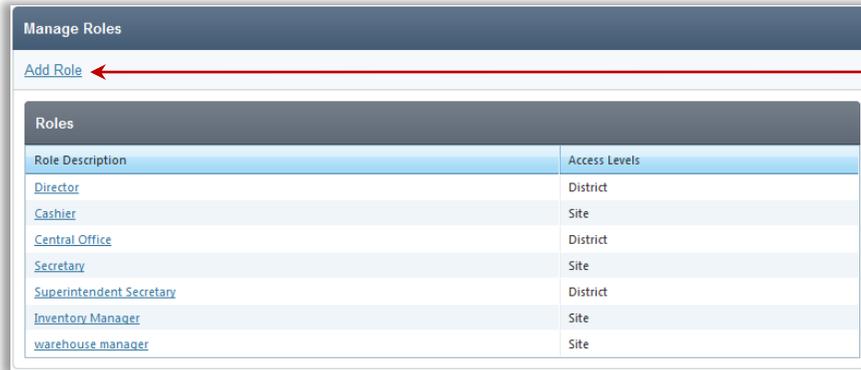


Expand an individual enabled category to view all enabled permission options.

Adding a Role

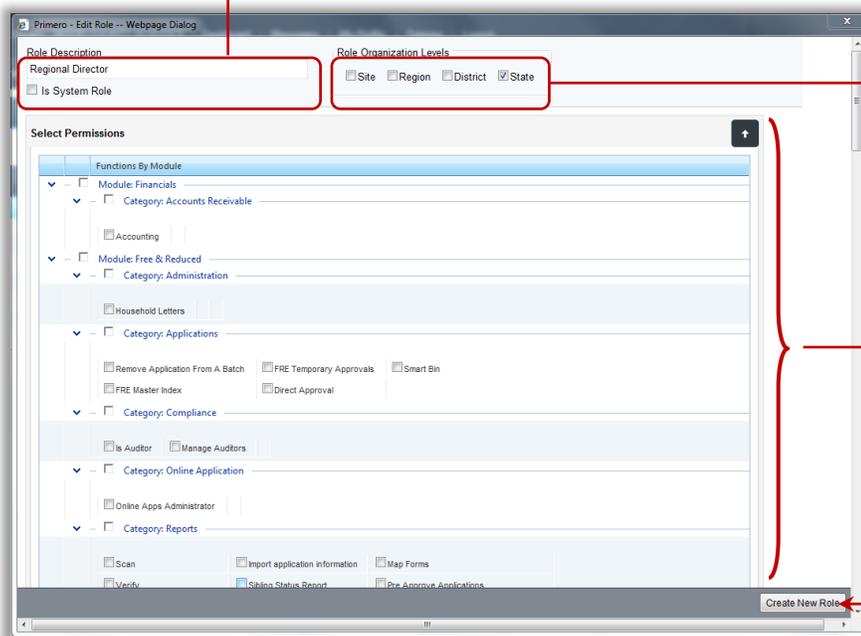
On the *Manage Roles* screen:

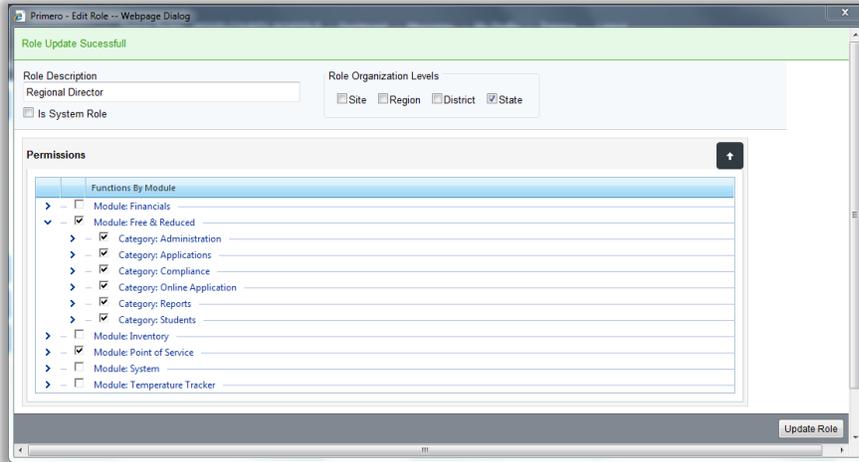
- Click the [Add Role](#) link.



On the *Edit Role* screen:

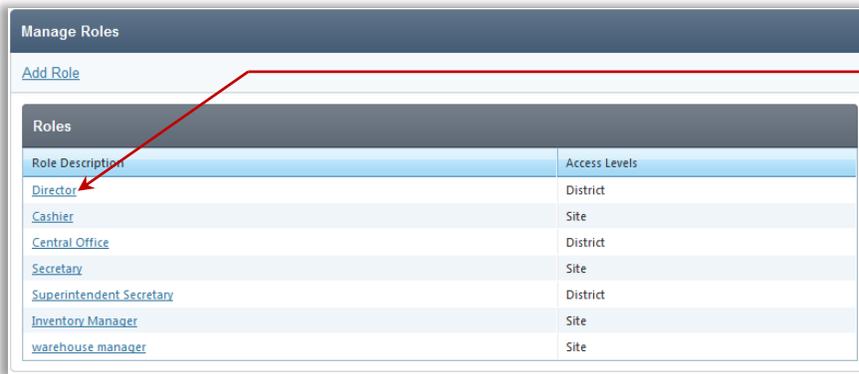
- In **Role Description**, enter a name for the new role.
- In **Role Organization Level**, select one or more levels (add check mark).
- In **Select Permissions**, select one or more permission options in the various modules and module categories.
- Click  .





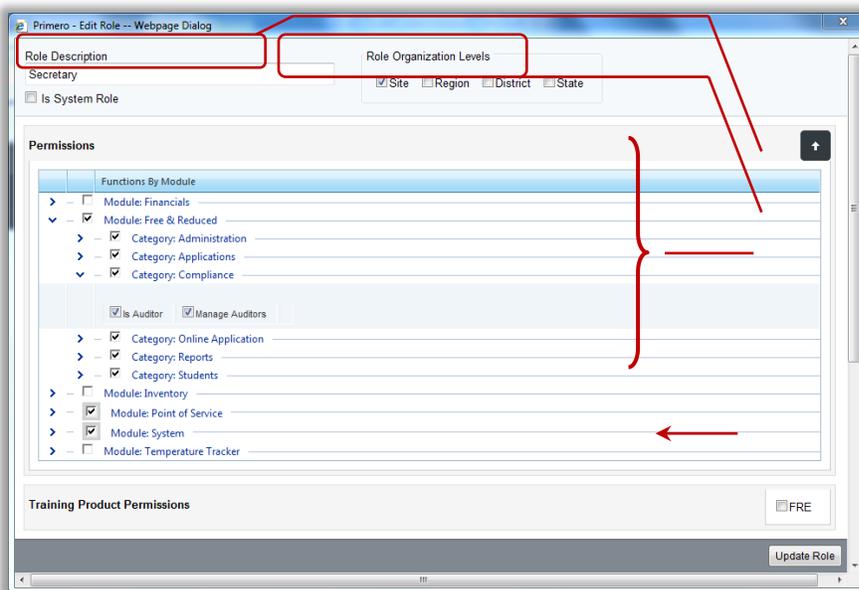
An update success message appears.

Changing Role Details

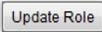


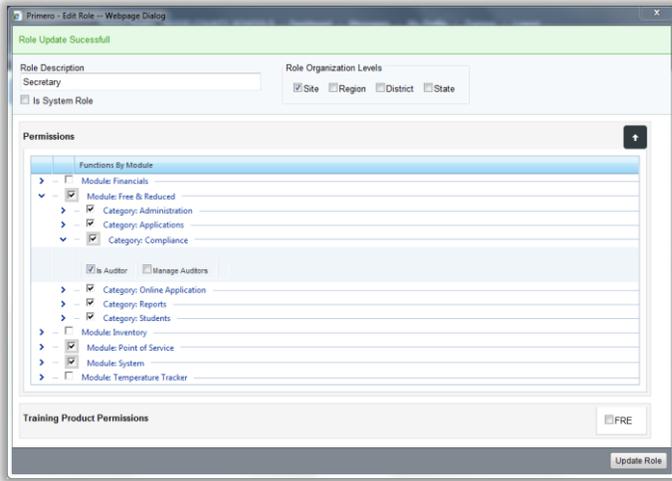
On the *Manage Roles* screen:

- Click a [RoleDescription](#) link in the Role Description column.



On the *Edit Role* screen:

- Make changes to the following as needed:
 - ★ Role Description
 - ★ Role Organization Levels
 - ★ Permissions
- Click .

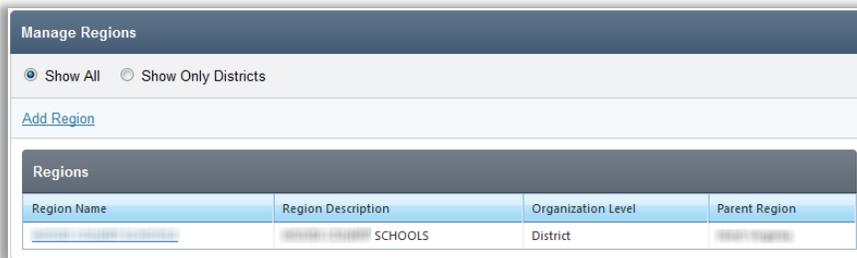


An update success message appears.

Topic: Manage Regions



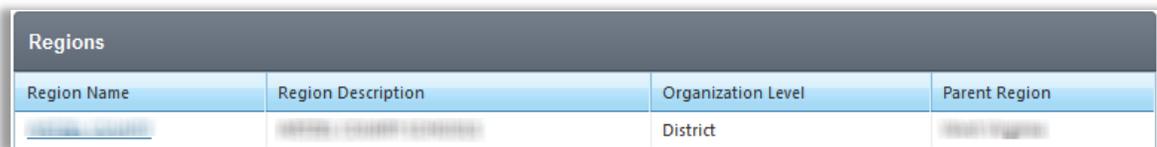
Manage Regions displays and manages regions or groupings of sites. Large districts are typically divided into groups, sometimes called “areas” or “regions”. This function allows for working with just those sites within a region or area.



On the *Manage Regions* screen:

- By default, all regions and districts are shown in the **Regions** list.

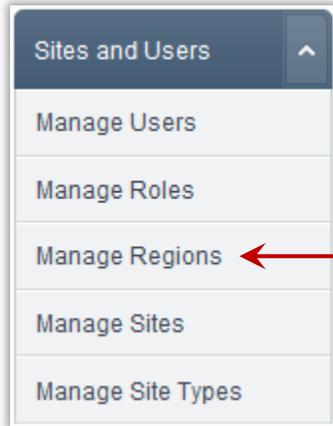
Regions Listings



Each listing in **Regions** includes:

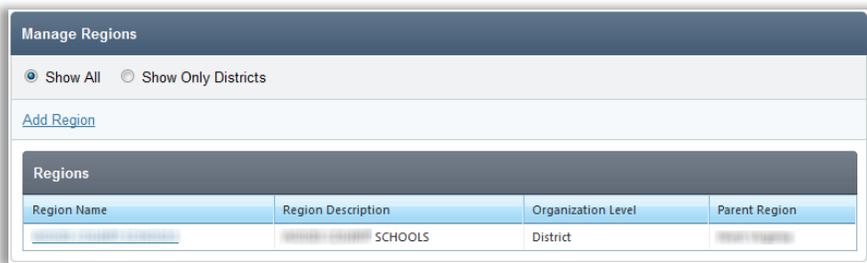
Header Name	Sortable	Description
Region Name		Clickable link ; name assigned to region by the district; click the link to view or change region details
Region Description		<i>View only</i> ; brief description of the region assigned by the district
Organization Level		<i>View only</i> ; reporting level of the organization
Parent Region		<i>View only</i> ; organization to which the district reports

Displaying All Regions



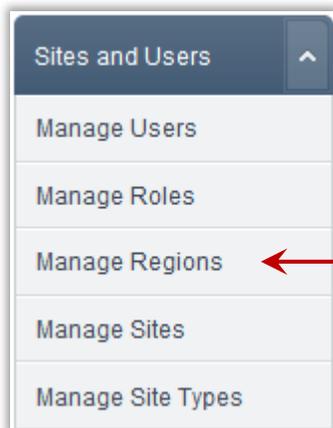
On the **Sites and Users** menu:

- Select **Manage Regions**.



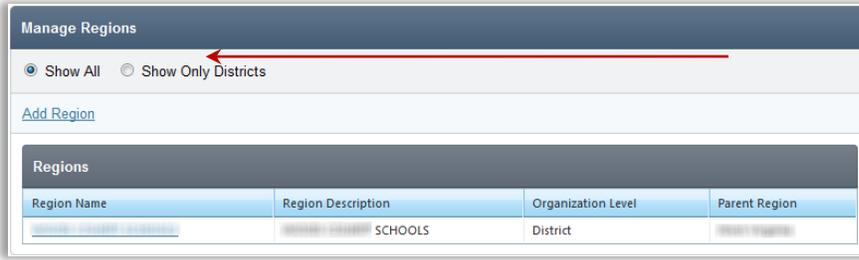
All existing regions are listed in **Regions** with each corresponding organization level.

Displaying All Districts



On the **Sites and Users** menu:

- Select **Manage Regions**.

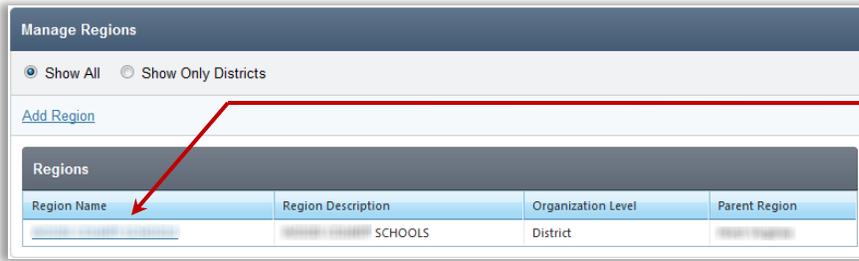


On the *Manage Regions* screen:

- Choose **Show Only Districts**.

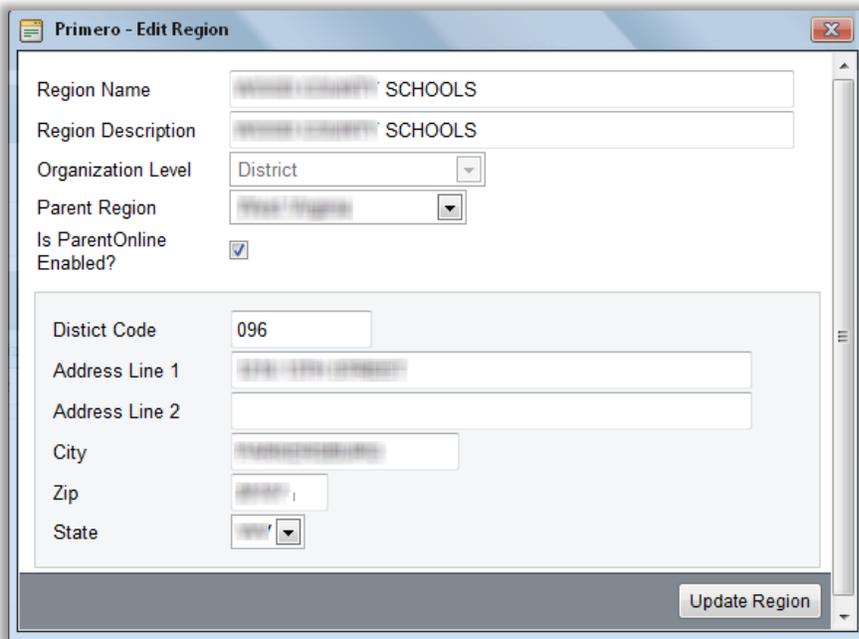
All districts are shown in the **Regions** list.

Displaying Region/District Details



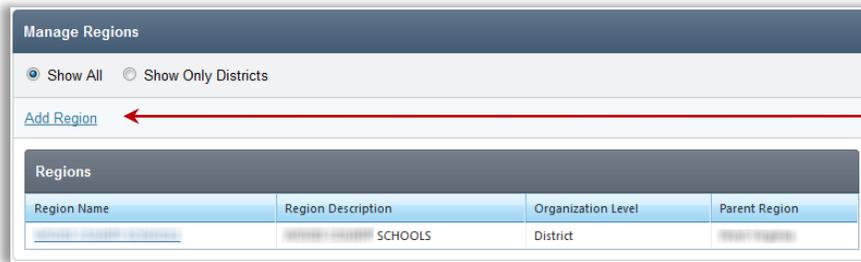
On the *Manage Regions* screen:

- Click a **RegionName** link in the **Region Name** column.



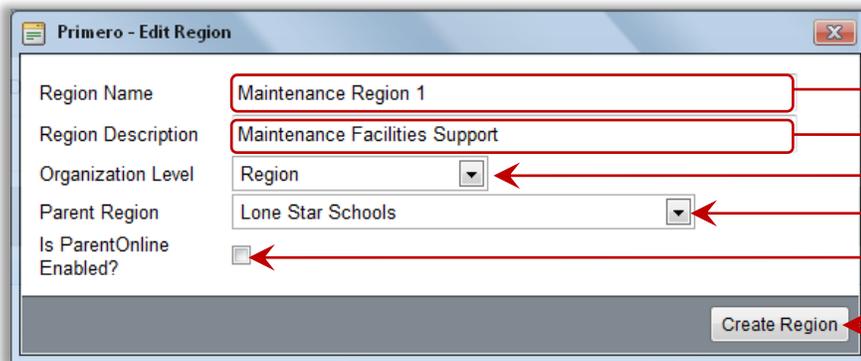
The *Edit Region* screen appears with the region/district details displayed.

Adding a Region



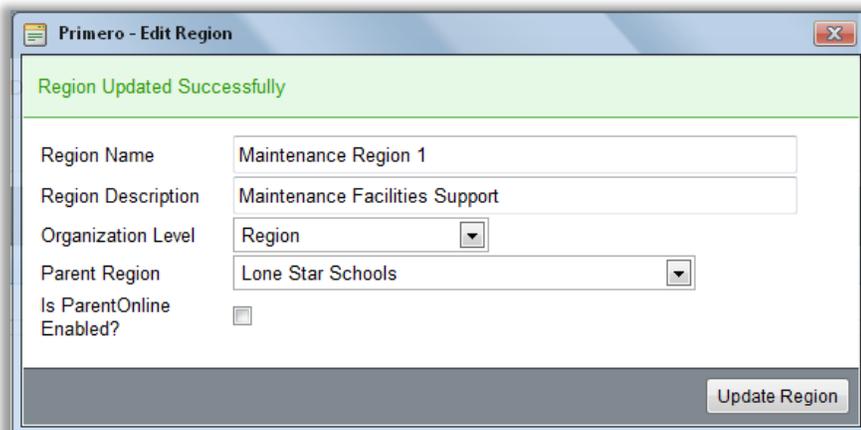
On the *Manage Regions* screen:

- Click the [Add Region](#) link.



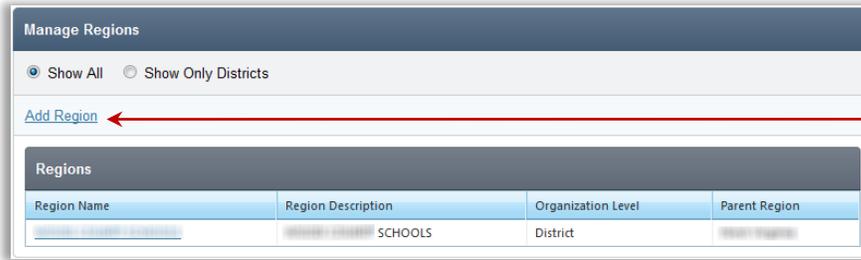
In the *Edit Region* dialog:

- In **Region Name**, enter a name.
- In **Region Description**, enter a brief description of the region.
- In **Organization Level**, select "Region".
- In **Parent Region**, select the level of which the region is a member.
- In **Is ParentOnline Enabled?**, select (add check mark) if Parent Online is available ; otherwise leave cleared.
- Click



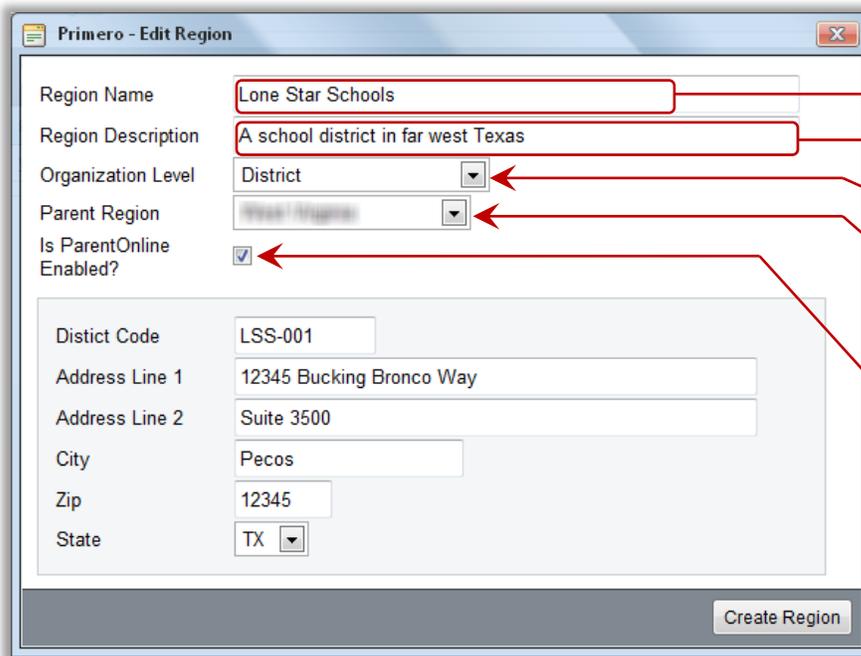
An update success message appears.

Adding a District



On the *Manage Regions* screen:

- Click the [Add Region](#) link.



In the *Edit Region* dialog:

- In **Region Name**, enter a name.
- In **Region Description**, enter a brief description of the region.
- In **Organization Level**, select "District".
- In **Parent Region**, select the level of which the region is a member.
- In **Is ParentOnline Enabled?**, select (add check mark) if Parent Online is available ; otherwise leave cleared.

Primero - Edit Region

Region Name: Lone Star Schools

Region Description: A school district in far west Texas

Organization Level: District

Parent Region: West Region

Is ParentOnline Enabled?

Distict Code: LSS-001

Address Line 1: 12345 Bucking Bronco Way

Address Line 2: Suite 3500

City: Pecos

Zip: 12345

State: TX

Create Region

- In **District Code**, enter the district's unique identifier.
- In **Address Line 1**, enter the street address of the district office.
- In **Address Line 2**, enter secondary address information such as suite or office number.
- In **City**, enter the city in which the district office is located.
- In **Zip**, enter the zip code in which the district offices are located.
- In **State**, select the state in which the district offices are located.
- Click 

Primero - Edit Region

Region Updated Successfully

Region Name: Lone Star Schools

Region Description: A school district in far west Texas

Organization Level: District

Parent Region: West Region

Is ParentOnline Enabled?

Distict Code: LSS-001

Address Line 1: 12345 Bucking Bronco Way

Address Line 2: Suite 3500

City: Pecos

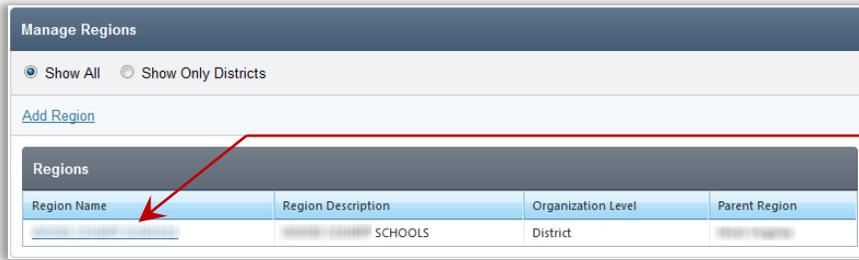
Zip: 12345

State: TX

Update Region

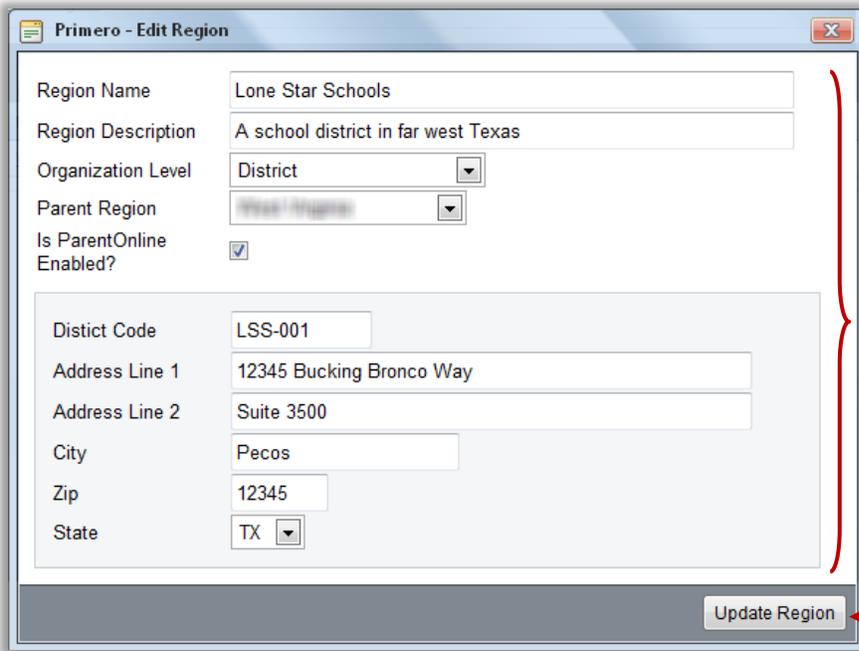
An update success message appears.

Changing Region/District Details



On the *Manage Regions* screen:

- Click a [RegionName](#) link.

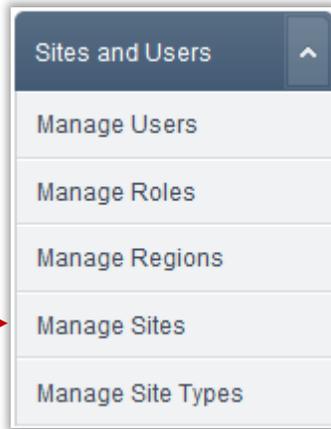


In the *Edit Region* dialog:

- Make changes to region/district details.

- Click .

Topic: Manage Sites



Manage Sites adds new sites and manages existing sites.

All district sites are included in **Manage Sites**.

Manage Sites

Region: [District] Site Type: All Site Types [Apply]

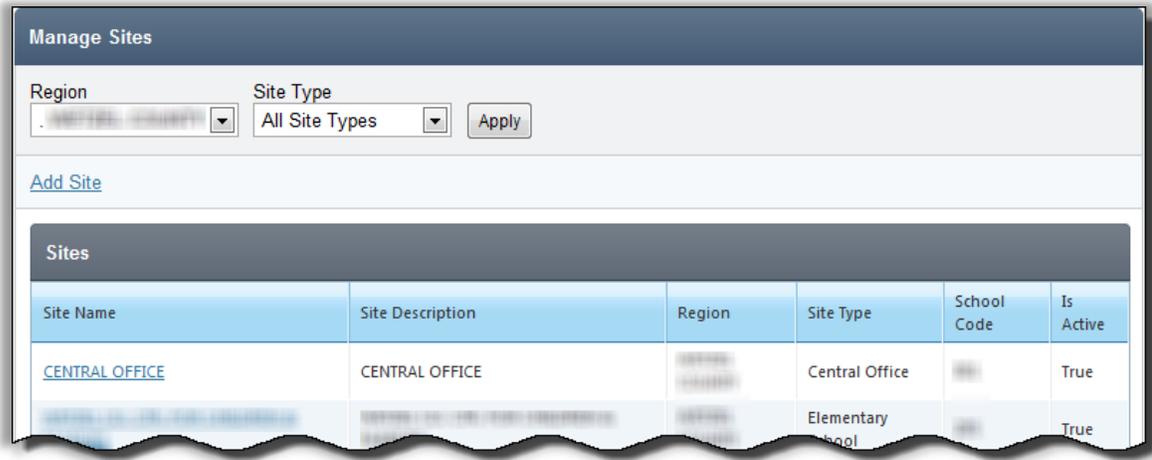
[Add Site](#)

Site Name	Site Description	Region	Site Type	School Code	Is Active
CENTRAL OFFICE	CENTRAL OFFICE	[District]	Central Office	[Code]	True
[Name] ELEMENTARY SCHOOL	[Name] ELEMENTARY SCHOOL	[District]	Elementary School	[Code]	True
[Name] HIGH SCHOOL	[Name] HIGH SCHOOL	[District]	High School	[Code]	True
[Name] HIGH SCHOOL	[Name] HIGH SCHOOL	[District]	High School	[Code]	True
[Name] SCHOOL	[Name] SCHOOL	[District]	Middle School	[Code]	True
[Name] SCHOOL	[Name] SCHOOL	[District]	Middle School	[Code]	True
[Name] SCHOOL	[Name] SCHOOL	[District]	Middle School	[Code]	True
[Name] HIGH SCHOOL	[Name] HIGH SCHOOL	[District]	High School	[Code]	True
[Name] ELEMENTARY SCHOOL	[Name] ELEMENTARY SCHOOL	[District]	Elementary School	[Code]	True
[Name] HIGH SCHOOL	[Name] HIGH SCHOOL	[District]	High School	[Code]	True
[Name] WAREHOUSE	WAREHOUSE	[District]	Warehouse	[Code]	True
[Name] WAREHOUSE2	WAREHOUSE2	[District]	Warehouse	[Code]	True

On the *Manage Sites* screen:

- By default, all existing sites are displayed in the **Manage Sites** list—both active and inactive sites.
-  refreshes the screen to display all sites that match the search conditions.

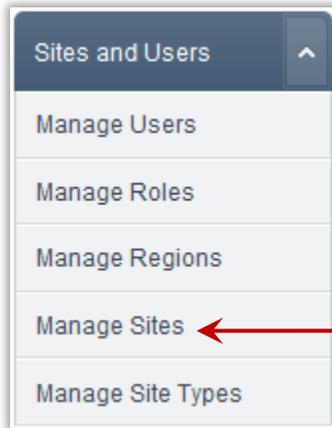
Sites Listings



Each listing in Sites includes:

Header Name	Sortable	Description
Site Name	✓	<i>View only</i> ; name assigned to the site by the district
Site Description	✓	<i>View only</i> ; complete description of the site assigned by the district
Region	✓	<i>View only</i> ; area of which the site is a member
Site Type	✓	<i>View only</i> ; brief description of site function/purpose
School Code	✓	<i>View only</i> ; site identifier assigned by the district
Is Active	✓	<p><i>View only</i>; indicates if the site appears in the list of available sites for all functions:</p> <ul style="list-style-type: none"> ★ True – site is active and appears in all functions ★ False – site is inactive and does not appear in functions

Displaying All Sites



On the *Sites and Users* menu:

- Click **Manage Sites**.

The screenshot shows the "Manage Sites" interface. At the top, there are dropdown menus for "Region" (set to "All Site Types") and "Site Type" (set to "All Site Types"), with an "Apply" button. Below this is an "Add Site" link. The main part of the interface is a table titled "Sites" with the following columns: Site Name, Site Description, Region, Site Type, School Code, and Is Active. The table contains 12 rows of site data.

Site Name	Site Description	Region	Site Type	School Code	Is Active
CENTRAL OFFICE	CENTRAL OFFICE	Region	Central Office	001	True
ELEMENTARY SCHOOL	ELEMENTARY SCHOOL	Region	Elementary School	001	True
HIGH SCHOOL	HIGH SCHOOL	Region	High School	001	True
HIGH SCHOOL	HIGH SCHOOL	Region	High School	001	True
MIDDLE SCHOOL	MIDDLE SCHOOL	Region	Middle School	001	True
MIDDLE SCHOOL	MIDDLE SCHOOL	Region	Middle School	001	True
MIDDLE SCHOOL	MIDDLE SCHOOL	Region	Middle School	001	True
HIGH SCHOOL	HIGH SCHOOL	Region	High School	001	True
ELEMENTARY SCHOOL	ELEMENTARY SCHOOL	Region	Elementary School	001	True
HIGH SCHOOL	HIGH SCHOOL	Region	High School	001	True
WAREHOUSE	WAREHOUSE	Region	Warehouse	001	True
WAREHOUSE2	WAREHOUSE2	Region	Warehouse	001	True

A list of all sites, of all types, is displayed in order by School Code in the **Sites** list.

Displaying Sites by Site Type

On the *Manage Sites* screen:

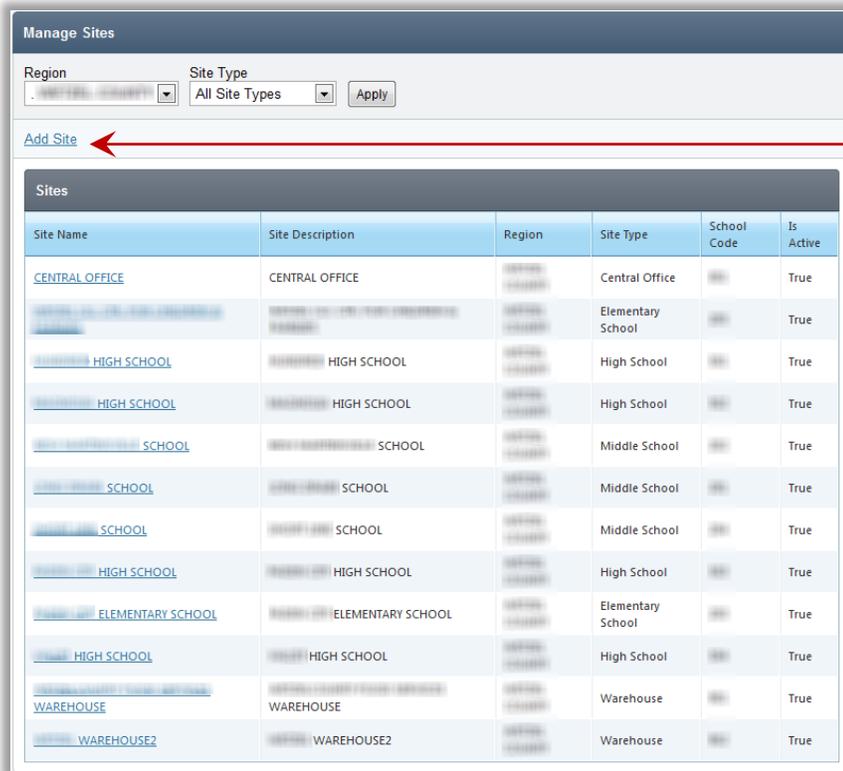
The screenshot shows the 'Manage Sites' interface. At the top, there are two dropdown menus: 'Region' and 'Site Type'. The 'Site Type' dropdown is open, showing a list of options: 'All Site Types', 'Elementary School', 'Middle School', 'High School', 'Warehouse', 'Kitchen', and 'Central Office'. The 'Middle School' option is highlighted. To the right of the dropdowns is an 'Apply' button. Below the dropdowns is an 'Add Site' link. The main part of the screen is a table titled 'Sites' with columns: Site Name, Site Description, Region, Site Type, School Code, and Is Active. The table contains 12 rows of site data, including Central Office, various High Schools, Middle Schools, Elementary Schools, and Warehouses.

- In **Region**, select a region.
- In **Site Type**, select a type.
- Click .

This screenshot shows the 'Manage Sites' interface after filtering. The 'Region' dropdown is set to 'All Regions' and the 'Site Type' dropdown is set to 'Middle School'. The 'Apply' button is visible. The 'Add Site' link is present. The 'Sites' table now only displays three rows, all of which are 'Middle School' sites, demonstrating the filter's effect.

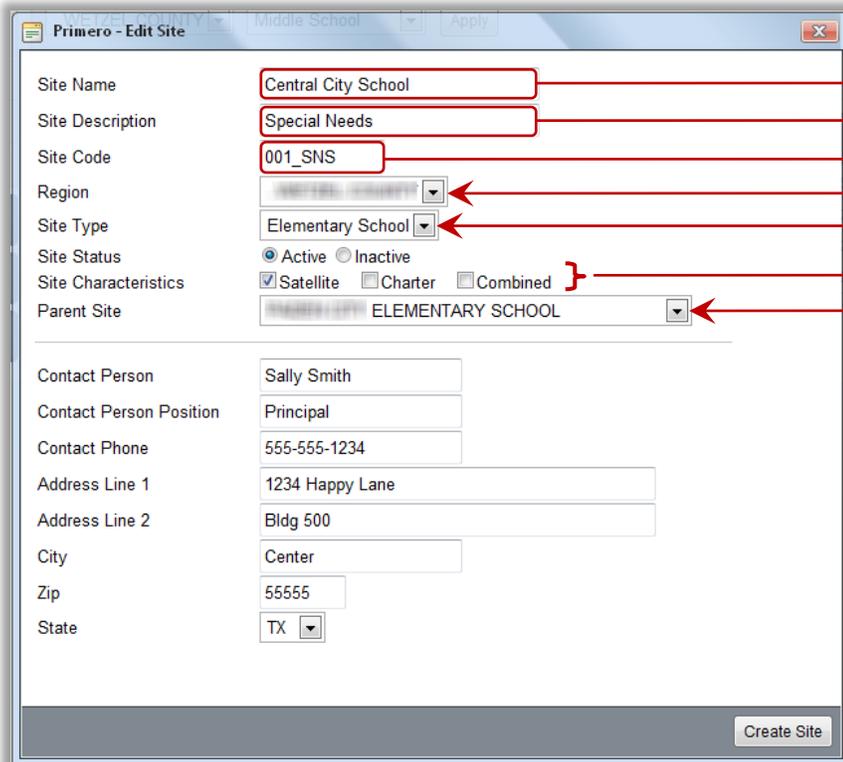
All sites of the selected type are displayed in the **Sites** list.

Adding a Site



On the *Manage Sites* screen:

- Click the [Add Site](#) link.



In the *Edit Site* dialog:

- In **Site Name**, enter a complete name for the site.
- In **Site Description**, enter a brief description of the site.
- In **Site Code**, enter the assigned site identifier.
- In **Region**, select the region.
- In **Site Type**, select a type.
- In **Site Characteristics**, choose one or more of:
 - * **Satellite** –indicates the site reports to another site.
 - * **Charter** –indicates the site reports directly to district administration.
- In **Parent Site**, select a site.

- In **Contact Person**, enter the name of the site contact.
- In **Contact Person Position**, enter the title of the site contact.
- In **Contact Phone**, enter the phone number of the site contact.
- In **Address Line 1 / Address Line 2**, enter the street address of the site.
- In **City, Zip** and **State**, enter the corresponding information for the site.
- Click  .

The new site appears in the Sites list on the *Manage Sites* screen.

Displaying Site Details

Site Name	Site Description	Region	Site Type	School Code	Is Active
CENTRAL OFFICE	CENTRAL OFFICE	...	Central Office	...	True
...	Elementary School	...	True
...	HIGH SCHOOL	...	High School	...	True
...	HIGH SCHOOL	...	High School	...	True
...	SCHOOL	...	Middle School	...	True
...	SCHOOL	...	Middle School	...	True
...	SCHOOL	...	Middle School	...	True
...	HIGH SCHOOL	...	High School	...	True
...	ELEMENTARY SCHOOL	...	Elementary School	...	True
...	HIGH SCHOOL	...	High School	...	True
...	WAREHOUSE	...	Warehouse	...	True
...	WAREHOUSE2	...	Warehouse	...	True

On the *Manage Sites* screen:

- Click a [SiteName](#) link in the **Site Name** column.

The *Edit Site* dialog appears with all site details displayed.

The screenshot shows a web-based form titled "Primero - Edit Site". The form is organized into several sections:

- Site Information:** Includes fields for Site Name, Site Description, Site Code, Region, Site Type, Site Status (Active/Inactive), Site Characteristics (Satellite, Charter, Combined), and Parent Site.
- Contact Information:** Includes fields for Contact Person, Contact Person Position, Contact Phone, Address Line 1, Address Line 2, City, Zip, and State.
- Operational Settings:** Includes radio buttons for "Can Order Broken Units" (Yes/No), "Is Feeding Site" (Yes/No), "Include for Reimbursement" (Yes/No), and "Connect To Server" (Yes/No).

An "Update Site" button is located at the bottom right of the form.

Changing Site Details

Manage Sites

Region: [All Site Types] Site Type: [All Site Types] [Apply]

Add Site

Site Name	Site Description	Region	Site Type	School Code	Is Active
CENTRAL OFFICE	CENTRAL OFFICE		Central Office		True
ELEMENTARY SCHOOL	ELEMENTARY SCHOOL		Elementary School		True
HIGH SCHOOL	HIGH SCHOOL		High School		True
HIGH SCHOOL	HIGH SCHOOL		High School		True
SCHOOL	SCHOOL		Middle School		True
SCHOOL	SCHOOL		Middle School		True
SCHOOL	SCHOOL		Middle School		True
HIGH SCHOOL	HIGH SCHOOL		High School		True
ELEMENTARY SCHOOL	ELEMENTARY SCHOOL		Elementary School		True
HIGH SCHOOL	HIGH SCHOOL		High School		True
WAREHOUSE	WAREHOUSE		Warehouse		True
WAREHOUSE2	WAREHOUSE2		Warehouse		True

On the *Manage Sites* screen:

- Click a [SiteName](#) link in the **Site Name** column.

Primero - Edit Site

Site Name: [SCHOOL]
 Site Description: [SCHOOL]
 Site Code: []
 Region: []
 Site Type: [Middle School]
 Site Status: Active Inactive
 Site Characteristics: Satellite Charter Combined
 Parent Site: [Select a Parent Site]
 Contact Person: []
 Contact Person Position: [Secretary]
 Contact Phone: []
 Address Line 1: [11223 Simms Valley Road]
 Address Line 2: []
 City: [Fort Smith]
 Zip: [89234]
 State: [AK]
 Can Order Broken Units: Yes No
 Is Feeding Site: Yes No
 Include for Reimbursement: Yes No
 Connect To Server: Yes No

[Update Site]

In the *Edit Site* dialog:

- Change selected details as needed.

- Click [Update Site](#).

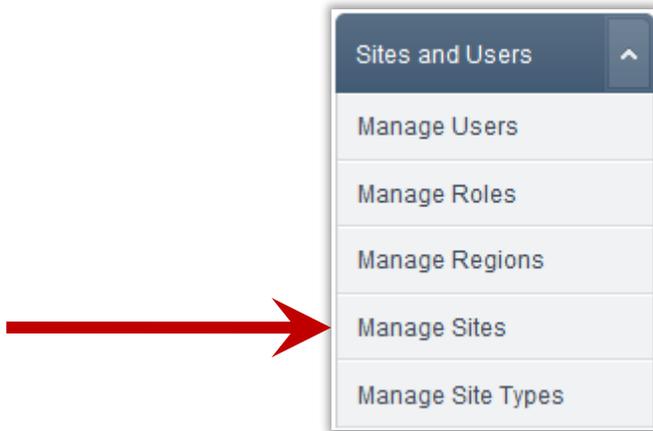
The screenshot shows a web application window titled "Primero - Edit Site". At the top, a green banner displays the message "Site Update Successful". Below this, the form contains the following fields and options:

- Site Name: [REDACTED] SCHOOL
- Site Description: [REDACTED] SCHOOL
- Site Code: [REDACTED]
- Region: [REDACTED]
- Site Type: Middle School
- Site Status: Active Inactive
- Site Characteristics: Satellite Charter Combined
- Parent Site: CENTRAL OFFICE
- Contact Person: [REDACTED]
- Contact Person Position: Secretary
- Contact Phone: [REDACTED]
- Address Line 1: 11223 Simms Valley Road
- Address Line 2: [REDACTED]
- City: Fort Smith
- Zip: 89234
- State: AK
- Can Order Broken Units: Yes No
- Is Feeding Site: Yes No
- Include for Reimbursement: Yes No
- Connect To Server: Yes No

An "Update Site" button is located at the bottom right of the form area.

An update success message appears.

Topic: Manage Site Types



Manage Site Types adds new site types and manages existing site types.

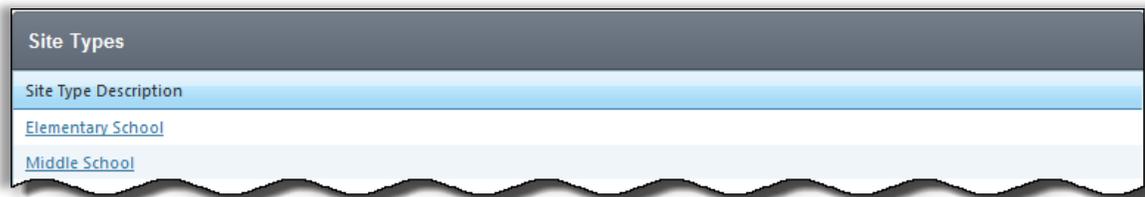
Site types are used to categorize and customize sites in the region/district.



On the *Manage Site Types* screen:

- By default, all existing site types are displayed.
- All listed descriptions are clickable links

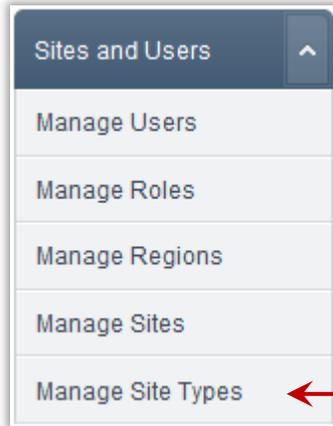
Site Types Listings



Each listing in **Sites** includes:

Header Name	Sortable	Description
Site Type Description		Clickable link: the link name is the name assigned to the site type by the district; click to display the <i>Edit Site Type</i> dialog; use the <i>Edit Site Type</i> dialog to change site type details

Displaying All Site Types



On the **Site and Users** menu:

- Click **Manage Site** Types.



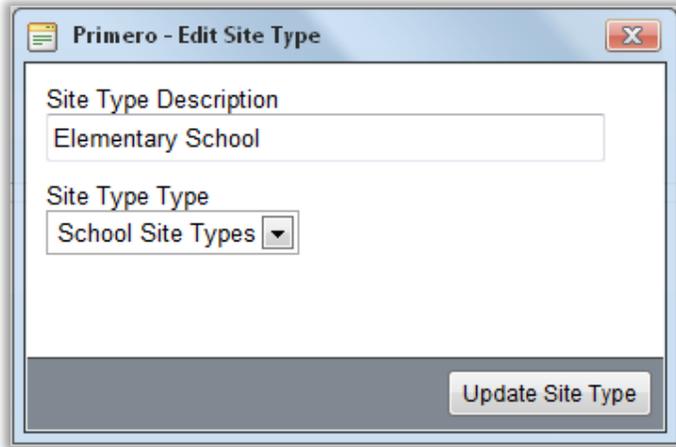
By default, all site types are listed in the order that they were created.

Displaying Site Type Details



On the **Manage Site Types** list:

- Click a [SiteTypeName](#) in the **Site Type Description** column.



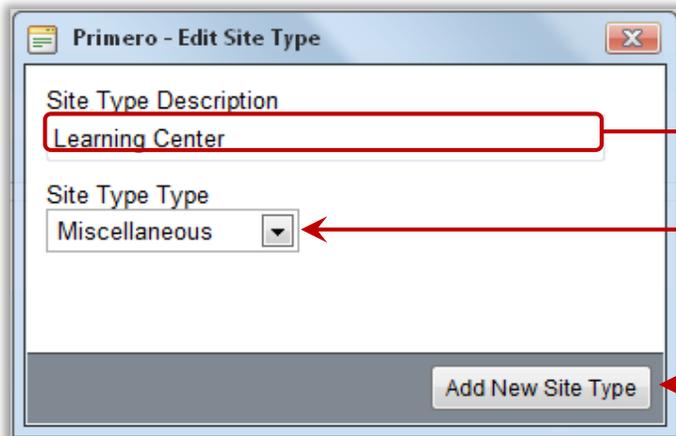
The *Edit Site Type* dialog displays site type details

Adding a Site Type



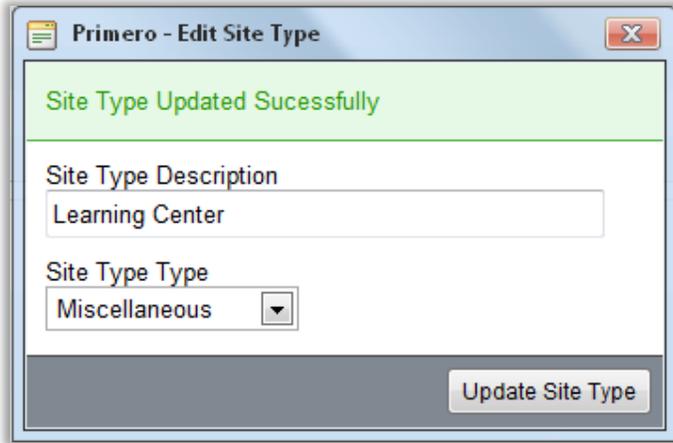
On the **Manage Site Types** list:

- Click the [Add Site Type](#) link.



In the *Edit Site Type* dialog:

- In **Site Type Description**, enter a brief name for the site type.
- In **Site Type Type**, select a type.
- Click .



An update success message appears.



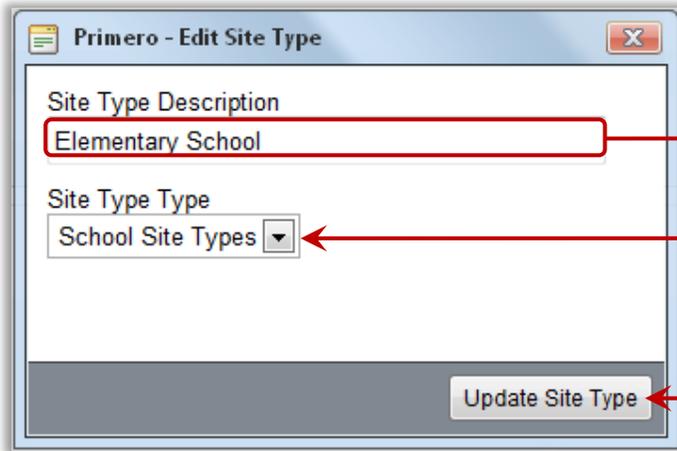
The new site type appears at the bottom of the list of site types.

Changing Site Type Details



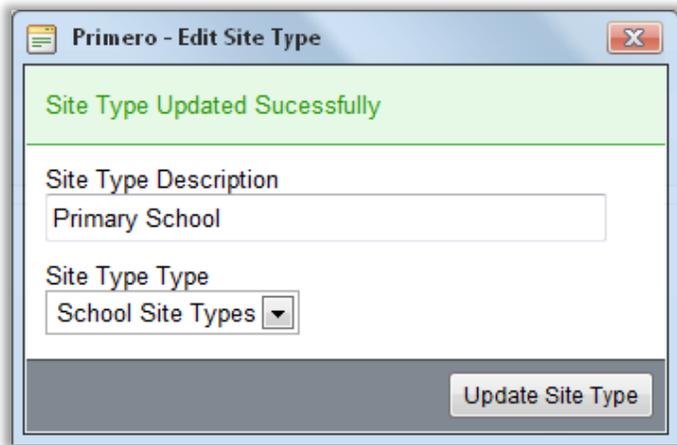
On the **Manage Site Types** list:

- Click a **SiteTypeName** in the **Site Type Description** column.

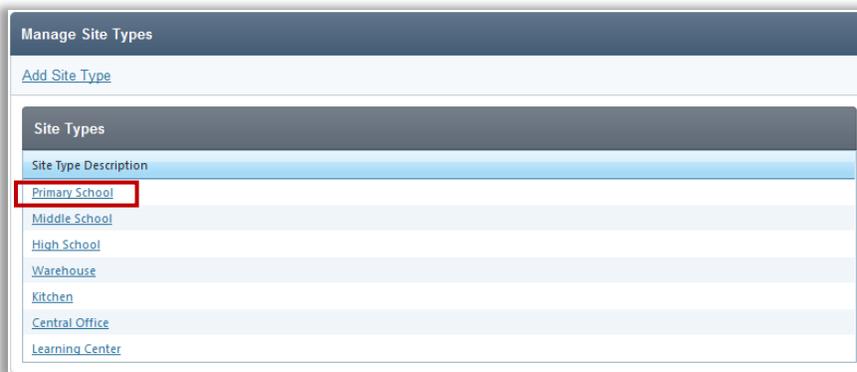


In the *Edit Site Type* dialog:

- In **Site Type Description**, enter a new description, if needed.
- In **Site Type Type**, select a type.
- Click .



An update success message appears.



The updated site type description appears in **Site Types** list.

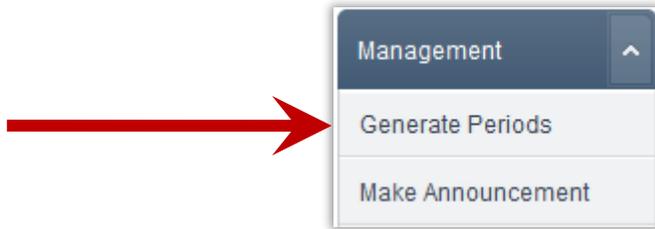
Chapter 4:

[System] Management

In this chapter you will learn how to:

- ✓ Generate periods
- ✓ Make an announcement
- ✓ Attach a file to an announcement

Topic: Generate Periods



Generate Periods creates financial periods for the school calendar year. Periods can be created weekly, biweekly, and monthly. An individual period can be split as many times as needed.

Generate Periods

Fiscal Year Configuration

Fiscal Year: 2009 - 2010 | Start Date: 7/1/2009 | End Date: 6/30/2010

Period Configuration

Period Type: POS Period

Existing Periods

Period	Start Date	End Date		Split Period
July 2009	07/01/2009	07/31/2009		
August 2009	08/01/2009	08/31/2009		
September 2009	09/01/2009	09/30/2009		
October 2009	10/01/2009	10/31/2009		
November 2009	11/01/2009	11/30/2009		
December 2009	12/01/2009	12/31/2009		
January 2010	01/01/2010	01/31/2010		
February 2010	02/01/2010	02/28/2010		
March 2010	03/01/2010	03/31/2010		
April 2010	04/01/2010	04/30/2010		
May 2010	05/01/2010	05/31/2010		
June 2010	06/01/2010	06/30/2010		

On the **Generate Periods** screen:

- By default, the existing periods for the current fiscal year for the first period type (POS Period) are listed.

Generate Periods

Fiscal Year Configuration

Fiscal Year: 2009 - 2010 | Start Date: 7/1/2009 | End Date: 6/30/2010

Period Configuration

Period Type: POS Period

Create Periods

Frequency: Weekly | End Day: Friday |

If no existing periods are available for the first period type, the **Create Periods** pane is displayed.

Existing Periods Listings

Existing Periods				
Period	Start Date	End Date		Split Period
July 2009	07/01/2009	07/31/2009		
August 2009	08/01/2009	08/31/2009		
September 2009	09/01/2009	09/30/2009		

Each listing in **Existing Periods** includes:

Header Name	Sortable	Description
Period		<i>View only</i> ; displays the period name or identifier
Start Date		<i>View only</i> ; displays the first date in the period
End Date		<i>View only</i> ; displays the last date in the period
(Edit)		Clickable icon ; click to change a period name or ending date.
Split Period		Entry field/Clickable icon ; provides an editable split field function for future periods in the event the period needs to be split (see the second figure on page 68).

Creating Periods

The screenshot shows the 'Generate Periods' interface. It is divided into three main sections: 'Fiscal Year Configuration', 'Period Configuration', and 'Create Periods'.
- **Fiscal Year Configuration:** 'Fiscal Year' is set to '2009 - 2010', 'Start Date' is '7/1/2009', and 'End Date' is '6/30/2010'.
- **Period Configuration:** 'Period Type' is set to 'POS Period'.
- **Create Periods:** 'Frequency' is set to 'Weekly' and 'End Day' is set to 'Friday'. A 'Preview Periods' button is visible.

On the *Generate Periods* screen:

- In **Fiscal Year**, select a year.
- In **Period Type**, select a type.
- In **Frequency**, select a period frequency.
- In **End Day**, select a day of the week.

↻ **End Day** is not available for a Monthly frequency.

This screenshot shows the 'Generate Periods' interface with the 'Frequency' set to 'Monthly'. The 'End Day' field is disabled. A red arrow points from the 'Preview Periods' button to the text on the right.

- Click

Generate Periods

Fiscal Year Configuration

Fiscal Year: 2009 - 2010 | Start Date: 7/1/2009 | End Date: 6/30/2010

Period Configuration

Period Type: POS Period

Create Periods

Frequency: Monthly | Preview Periods | Create Periods

Period Name	Start Date	End Date	Split Period
July 2009	07/01/2009	7/31/2009	7/2/2009
August 2009	08/01/2009	8/31/2009	8/2/2009
September 2009	09/01/2009	9/30/2009	9/2/2009
October 2009	10/01/2009	10/31/2009	10/2/2009
November 2009	11/01/2009	11/30/2009	11/2/2009
December 2009	12/01/2009	12/31/2009	12/2/2009
January 2010	01/01/2010	1/31/2010	1/2/2010
February 2010	02/01/2010	2/28/2010	2/2/2010
March 2010	03/01/2010	3/31/2010	3/2/2010
April 2010	04/01/2010	4/30/2010	4/2/2010
May 2010	05/01/2010	5/31/2010	5/2/2010
June 2010	06/01/2010	6/30/2010	6/2/2010

In the Preview listings:

- Select a new end date for the period, if needed.
- Click  to remove a period from the fiscal year, if needed.

Fiscal Year Configuration

Fiscal Year: 2009 - 2010 | Start Date: 7/1/2009 | End Date: 6/30/2010

Period Configuration

Period Type: POS Period

Create Periods

Frequency: Monthly | Preview Periods | Create Periods

Period Name	Start Date	End Date	Split Period
July 2009	07/01/2009	7/31/2009	7/16/2009
August 2009	08/01/2009	8/31/2009	8/2/2009
September 2009	09/01/2009	9/30/2009	9/2/2009
October 2009	10/01/2009	10/31/2009	10/2/2009
November 2009	11/01/2009	11/30/2009	11/2/2009
December 2009	12/01/2009	12/31/2009	12/2/2009
January 2010	01/01/2010	1/31/2010	1/2/2010
February 2010	02/01/2010	2/28/2010	2/2/2010
March 2010	03/01/2010	3/31/2010	3/2/2010
April 2010	04/01/2010	4/30/2010	4/2/2010
May 2010	05/01/2010	5/31/2010	5/2/2010
June 2010	06/01/2010	6/30/2010	6/2/2010

To split a period:

- In **Split Period**, enter or select the beginning date of the second split period.
- Click .

Generate Periods

Fiscal Year Configuration

Fiscal Year: 2009 - 2010 | Start Date: 7/1/2009 | End Date: 6/30/2010

Period Configuration

Period Type: POS Period

Create Periods

Frequency: Monthly | |

Period Name	Start Date	End Date		Split Period
July 2009	07/01/2009	7/15/2009	<input type="button" value="Split"/>	7/2/2009 <input type="button" value="Split"/>
July 2009_1	07/16/2009	7/31/2009	<input type="button" value="Split"/>	7/17/2009 <input type="button" value="Split"/>
August 2009	08/01/2009	8/31/2009	<input type="button" value="Split"/>	8/2/2009 <input type="button" value="Split"/>
September 2009	09/01/2009	9/30/2009	<input type="button" value="Split"/>	9/2/2009 <input type="button" value="Split"/>
October 2009	10/01/2009	10/31/2009	<input type="button" value="Split"/>	10/2/2009 <input type="button" value="Split"/>
November 2009	11/01/2009	11/30/2009	<input type="button" value="Split"/>	11/2/2009 <input type="button" value="Split"/>
December 2009	12/01/2009	12/31/2009	<input type="button" value="Split"/>	12/2/2009 <input type="button" value="Split"/>
January 2010	01/01/2010	1/31/2010	<input type="button" value="Split"/>	1/2/2010 <input type="button" value="Split"/>
February 2010	02/01/2010	2/28/2010	<input type="button" value="Split"/>	2/2/2010 <input type="button" value="Split"/>
March 2010	03/01/2010	3/31/2010	<input type="button" value="Split"/>	3/2/2010 <input type="button" value="Split"/>
April 2010	04/01/2010	4/30/2010	<input type="button" value="Split"/>	4/2/2010 <input type="button" value="Split"/>
May 2010	05/01/2010	5/31/2010	<input type="button" value="Split"/>	5/2/2010 <input type="button" value="Split"/>
June 2010	06/01/2010	6/30/2010	<input type="button" value="Split"/>	6/2/2010 <input type="button" value="Split"/>

The new split periods appear.

At any time, click to return to the default period listings for the selected Frequency/End Day.

When periods are displayed as needed in the Preview listings:

- Click .

Generate Periods

Fiscal Year Configuration

Fiscal Year: 2009 - 2010 | Start Date: 7/1/2009 | End Date: 6/30/2010

Period Configuration

Period Type: POS Period

Existing Periods

Period	Start Date	End Date		Split Period
July 2009	07/01/2009	07/31/2009	<input type="button" value="Split"/>	
August 2009	08/01/2009	08/31/2009	<input type="button" value="Split"/>	
September 2009	09/01/2009	09/30/2009	<input type="button" value="Split"/>	
October 2009	10/01/2009	10/31/2009	<input type="button" value="Split"/>	
November 2009	11/01/2009	11/30/2009	<input type="button" value="Split"/>	
December 2009	12/01/2009	12/31/2009	<input type="button" value="Split"/>	
January 2010	01/01/2010	01/31/2010	<input type="button" value="Split"/>	
February 2010	02/01/2010	02/28/2010	<input type="button" value="Split"/>	
March 2010	03/01/2010	03/31/2010	<input type="button" value="Split"/>	
April 2010	04/01/2010	04/30/2010	<input type="button" value="Split"/>	
May 2010	05/01/2010	05/31/2010	<input type="button" value="Split"/>	
June 2010	06/01/2010	06/30/2010	<input type="button" value="Split"/>	

The periods are generated and displayed in the **Existing Periods** list.

Editing a Period

Generate Periods

Fiscal Year Configuration

Fiscal Year: 2010 - 2011
 Start Date: 7/1/2010
 End Date: 6/30/2011

Period Configuration

Period Type: POS Period

Existing Periods

Period	Start Date	End Date		Split Period
July-August 2010	07/01/2010	08/31/2010		
September 2010	09/01/2010	09/30/2010		
October 2010	10/01/2010	10/31/2010		
November 2010	11/01/2010	11/30/2010		
December 2010	12/01/2010	12/31/2010		
January 2011	01/01/2011	01/31/2011		
February 2011	02/01/2011	02/28/2011		
March 2011	03/01/2011	03/31/2011		
April 2011	04/01/2011	04/30/2011		
May 2011	05/01/2011	05/31/2011		
June 2011	06/01/2011	06/30/2011		6/2/2011 <input type="button" value="Split"/>

On the *Generate Periods* screen:

- In a period listing, click

Generate Periods

Fiscal Year Configuration

Fiscal Year: 2010 - 2011
 Start Date: 7/1/2010
 End Date: 6/30/2011

Period Configuration

Period Type: POS Period

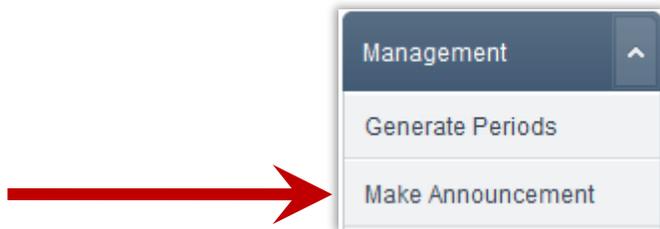
Existing Periods

Period	Start Date	End Date		Split Period
July-August 2010	07/01/2010	8/31/2010		
September 2010	09/01/2010	09/30/2010		
October 2010	10/01/2010	10/31/2010		
November 2010	11/01/2010	11/30/2010		
December 2010	12/01/2010	12/31/2010		
January 2011	01/01/2011	01/31/2011		
February 2011	02/01/2011	02/28/2011		
March 2011	03/01/2011	03/31/2011		
April 2011	04/01/2011	04/30/2011		
May 2011	05/01/2011	05/31/2011		
June 2011	06/01/2011	06/30/2011		6/2/2011 <input type="button" value="Split"/>

In the *Existing Periods* list:

- In **Period**, enter a new period name.
- In **End Date**, enter or select a new date.
- Click to save changes.

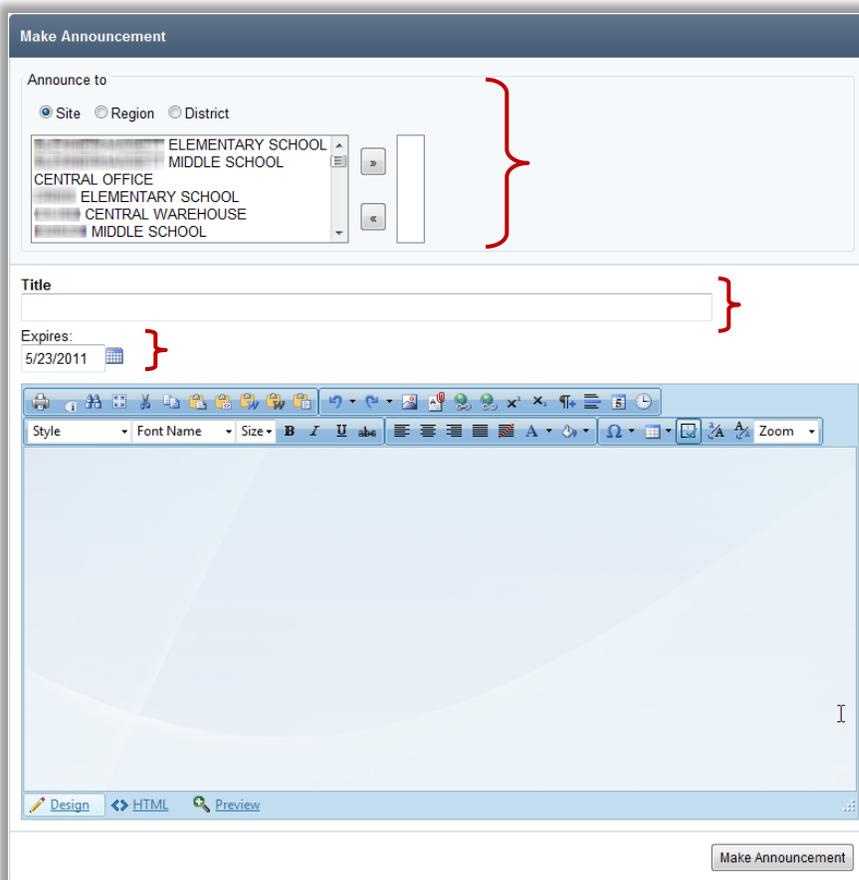
Topic: Make Announcement



Make Announcement creates an announcement message that is displayed on the Dashboard. The message can be sent to all sites, regions, or districts, or individual sites, regions, or districts can be selected to receive the announcement.

One or more files can be attached to an announcement. File size and type restrictions are in place.

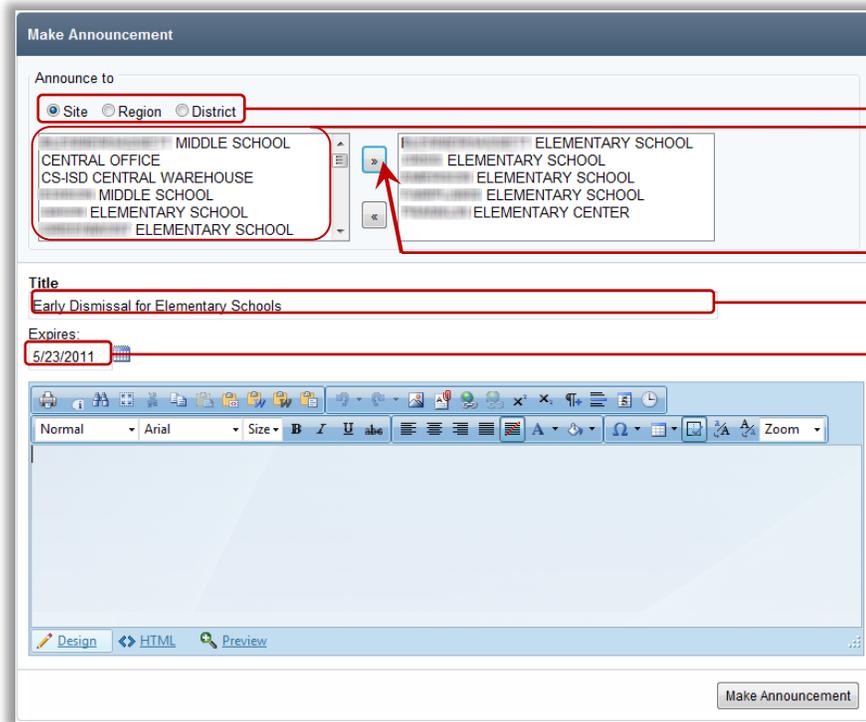
To attach files to an announcement, the “\UserDocuments\Upload” folder must exist on the PrimeroEdge server.



The default *Make Announcement* screen displays four areas:

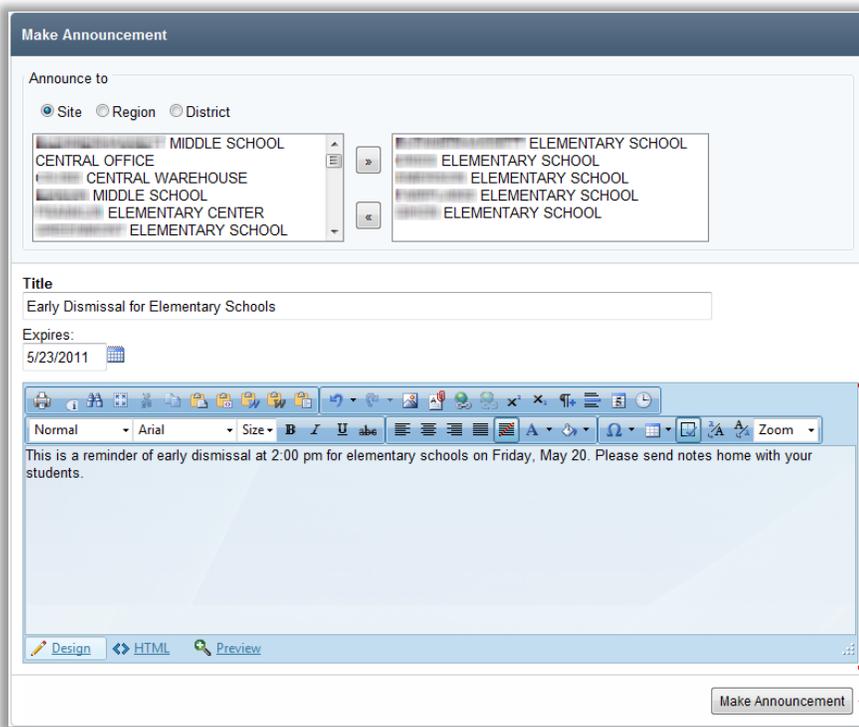
- **Announce to** – locations that are to receive the announcement; choices are Site, Region, District
- **Title** – area where a brief description of announcement is entered
- **Expires** – date on which the announcement is removed from display
- **Text pane** – area where the announcement text is entered and formatted.

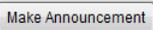
Displaying an Announcement

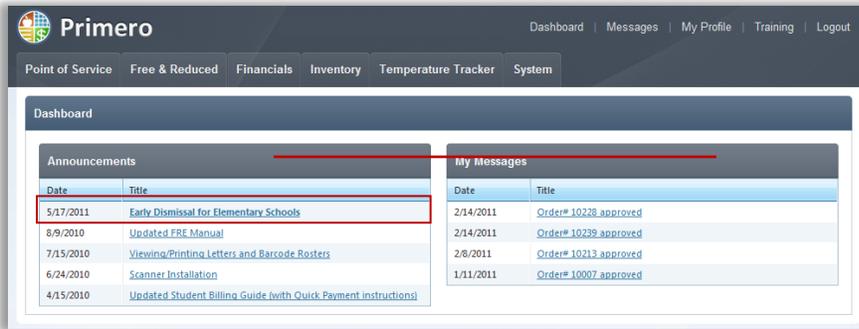


On the *Make Announcement* screen:

- In **Announce to**, choose an area.
- For each site/region/district to receive the announcement:
 - ★ Select a site/region/district in the left pane.
 - ★ Click **Move To** () to move the selected items to the right pane.
- In **Title**, enter a brief title that summarizes the announcement.
- In **Expires**, accept the default (7 days) or enter/select a new date on which the announcement is automatically removed.



- In the Text pane, enter announcement text. Use the formatting buttons as needed.
- Click .



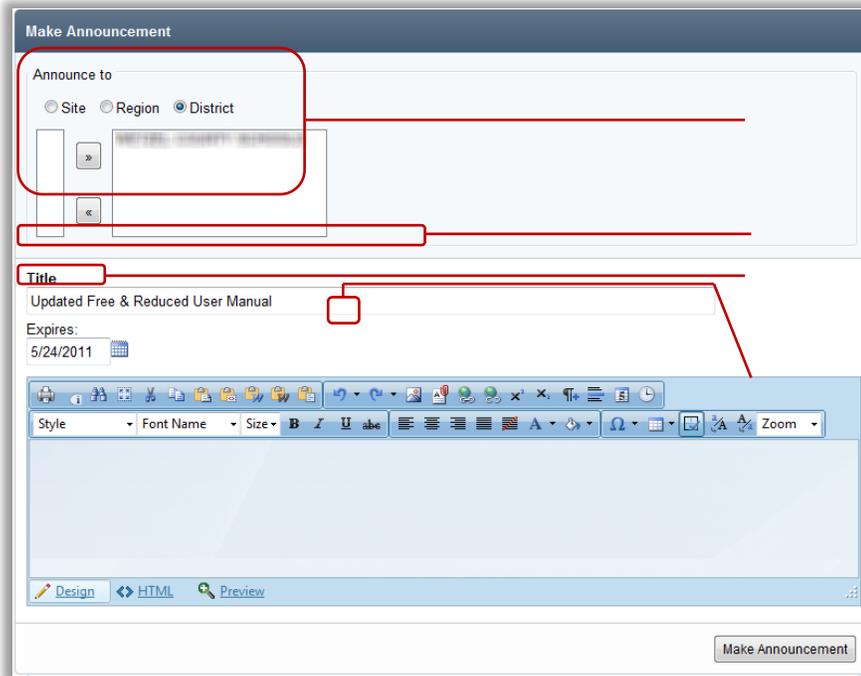
The screenshot shows the Primero dashboard interface. At the top, there is a navigation bar with the Primero logo and links for Dashboard, Messages, My Profile, Training, and Logout. Below this is a secondary navigation bar with tabs for Point of Service, Free & Reduced, Financials, Inventory, Temperature Tracker, and System. The main content area is titled 'Dashboard' and contains two tables. The 'Announcements' table has a red border around the first row, which contains the date 5/17/2011 and the title 'Early Dismissal for Elementary Schools'. The 'My Messages' table lists several messages with dates and titles, such as 'Order# 10228 approved'.

Date	Title
5/17/2011	Early Dismissal for Elementary Schools
8/9/2010	Updated FRE Manual
7/15/2010	Viewing/Printing Letters and Barcode Rosters
6/24/2010	Scanner Installation
4/15/2010	Updated Student Billing Guide (with Quick Payment instructions)

Date	Title
2/14/2011	Order# 10228 approved
2/14/2011	Order# 10239 approved
2/8/2011	Order# 10213 approved
1/11/2011	Order# 10007 approved

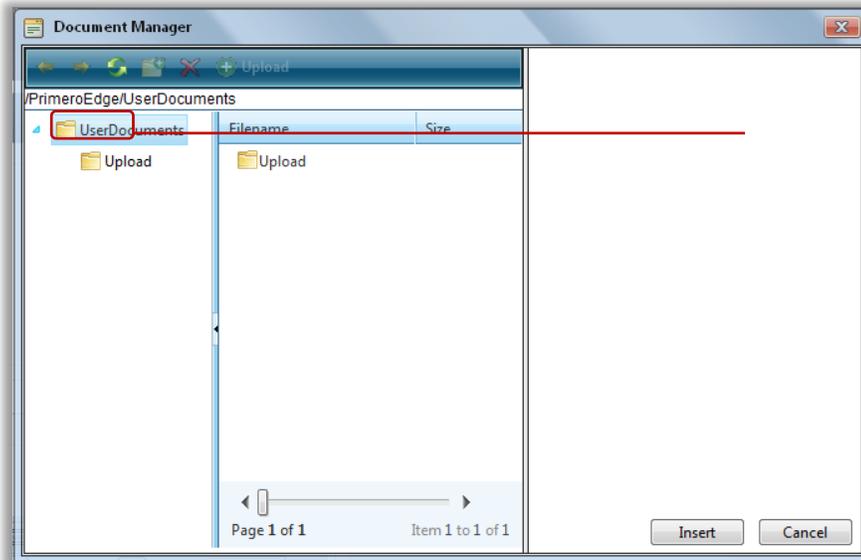
The announcement appears in the **Announcements** pane.

Attaching a File to an Announcement



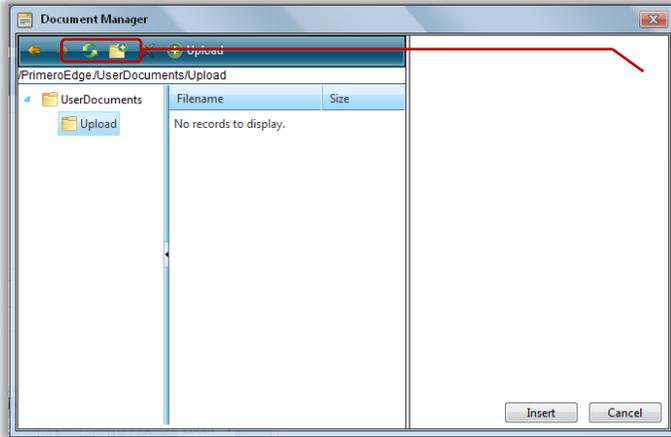
On the *Make Announcement* screen:

- In **Announce to**, select sites/region/district.
- In **Title**, enter a title text.
- In **Expires**, enter/select an expiration date.
- In the Document pane, click **Document Manager** () to open the *Document Manager* dialog.



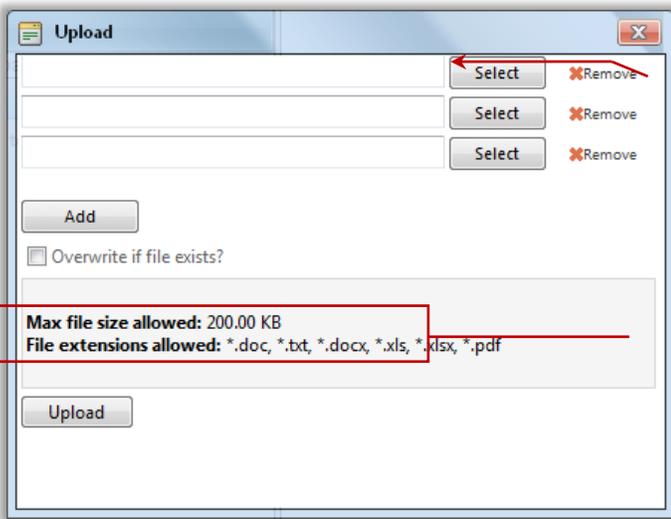
In the **Document Manager** dialog:

- Click the **Upload** folder () to make the Document Manager tools available.



On the Document Manager toolbar:

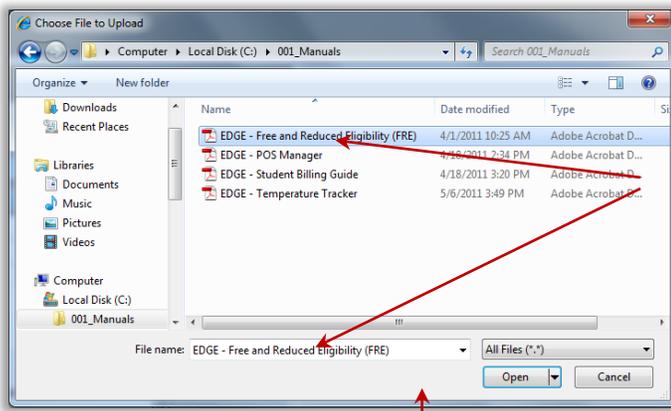
- Click **Upload** () to display the *Upload* dialog.



In the *Upload* dialog:

- Click  to display the *Choose File to Upload* dialog.

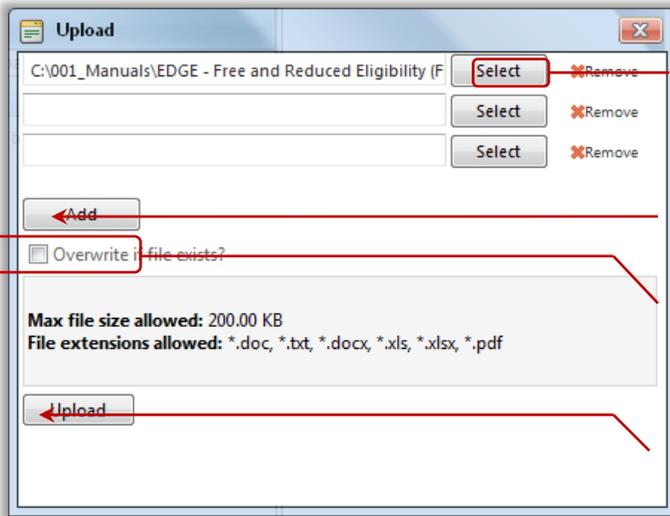
➡ Be sure to note the maximum allowed file size and the allowed file extensions!



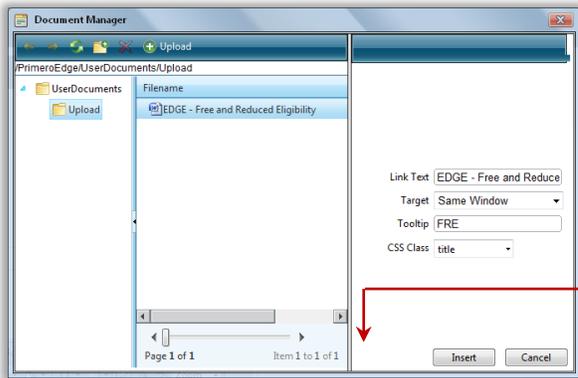
In the *Choose File to Upload* dialog:

- Use standard navigation techniques to select a file.

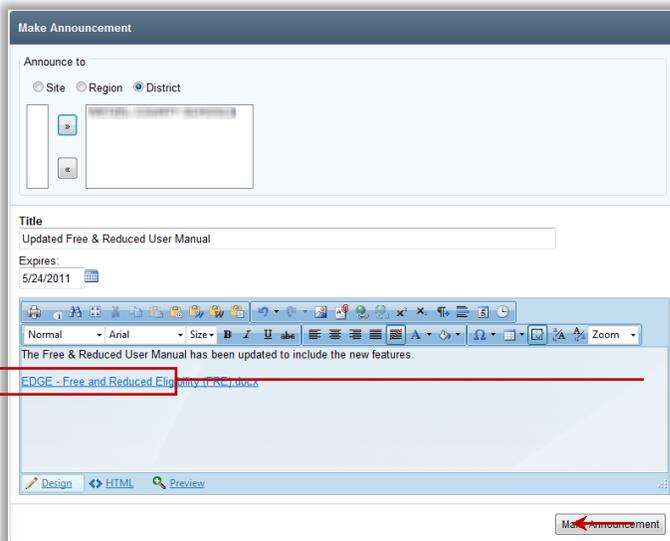
- Click .

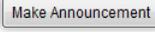


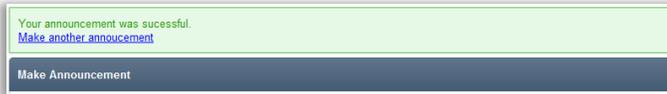
- Select more files, if needed:
 - ★ Click **Remove** () to remove a selected file.
 - ★ Click  to add more file selection boxes.
 - ★ Select **Overwrite if file exists?** to replace an existing version of a selected file.
- Click  .



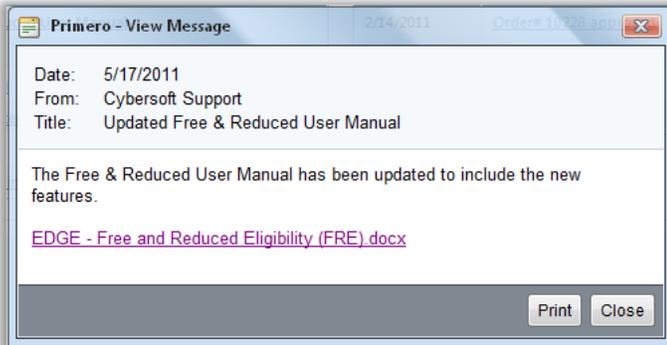
- In the *Document Manager* dialog:
- Click  to create a link in the announcement to the selected file(s).



- On the *Make Announcement* screen:
- A link to the uploaded document is placed in the announcement text area.
- Click  .



A success message appears.



Clicking on the announcement link on the Dashboard displays the announcement with the link to the uploaded file.

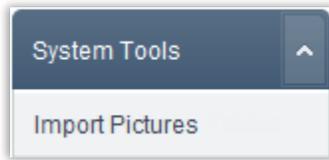
Chapter 5:

System Tools

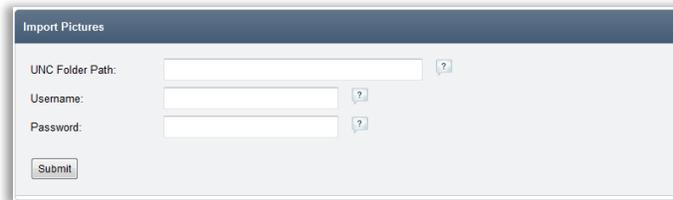
In this chapter you will learn how to:

- ✓ Import pictures for use with student ID cards

Topic: Import Pictures



Import Pictures imports student picture files. These pictures are used when printing student ID cards.

A screenshot of a web application window titled "Import Pictures". The window has a dark blue header. Below the header, there are three input fields: "UNC Folder Path:" with a text box and a help icon, "Username:" with a text box and a help icon, and "Password:" with a text box and a help icon. At the bottom left of the form area is a "Submit" button.

By default, the *Import Pictures* screen offers three empty fields.

Before importing pictures, verify that the picture *file names* are in the format of:

StudentID.ext

Where:

StudentID is the student's district identifier

.ext is a valid graphics file extension

For example, Sally Parker's student ID is 999996789. Her picture file name must be "999996789.ext".

Importing Student Picture Files

On the *Import Pictures* screen:

The screenshot shows the 'Import Pictures' form with the following fields: 'UNC Folder Path' containing '\\LoneStarSchools\pictures', 'Username' containing 'principal_001', and 'Password' containing a masked password. A 'Submit' button is located at the bottom left. Red arrows point from the text on the right to each of these four elements.

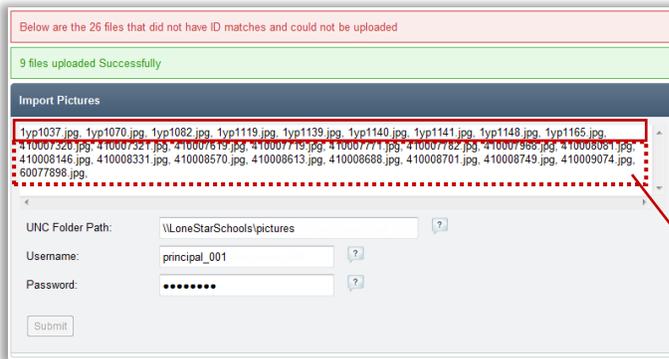
- In **UNC Folder Path**, enter the complete folder path of the picture files.
- In **Username**, enter the username with permissions to upload the file.
- In **Password**, enter the password associated with the Username.
- Click .

The screenshot shows the 'Import Pictures' form with progress bars. The 'Validating Files' bar is at 0% (Total 0 of 0). The 'Uploading Files to Database' bar is at 0% (Total files: 0). The 'Current Processing File' is empty, and the 'Elapsed time' is 00:00:01s at a speed of 0 Files/Second.

Two status bars appear to indicate the progress of the upload.

The screenshot shows the 'Import Pictures' form with progress bars. The 'Validating Files' bar is at 100% (Thumbs.db) Total 35 of 36. The 'Uploading Files to Database' bar is at 94% (60019350.jpg) Total files: 33. The 'Current Processing File' is 60019350.jpg and the 'Elapsed time' is 00:00:10s at a speed of 34 Files/Second.

The files are validated first and then uploaded.



When the upload is complete, two messages appear:

- ★ Number of files that could not be uploaded.
- ★ Number of files that were successfully uploaded.

The files that could not be uploaded are listed.

In this example, the files that could not be uploaded were all valid picture files (.JPG) but:

- ★ Some files did not include the student's district identifier in the file name, or
- ★ Some files included a student identifier that did not match a student record at the school where the files were being uploaded.

Therefore files that did not upload were files that could not be matched with a student record.

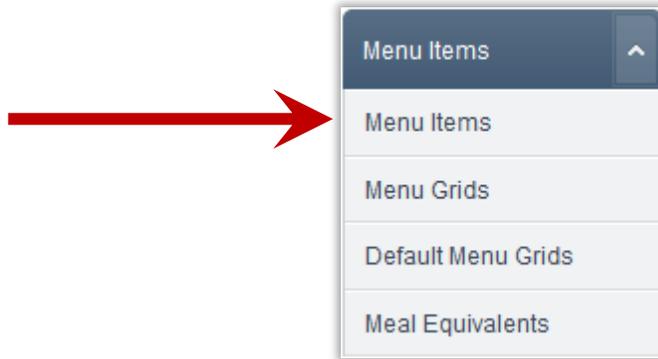
Chapter 6:

[POS] Menu Items

In this chapter you will learn how to:

- ✓ Create, change and remove menu items
- ✓ Create, change and remove a menu grid
- ✓ Create, change and remove default menu grids
- ✓ Set up and change meal equivalents

Topic: Menu Items



Menu Items adds, removes, and changes menu items.

Menu Items

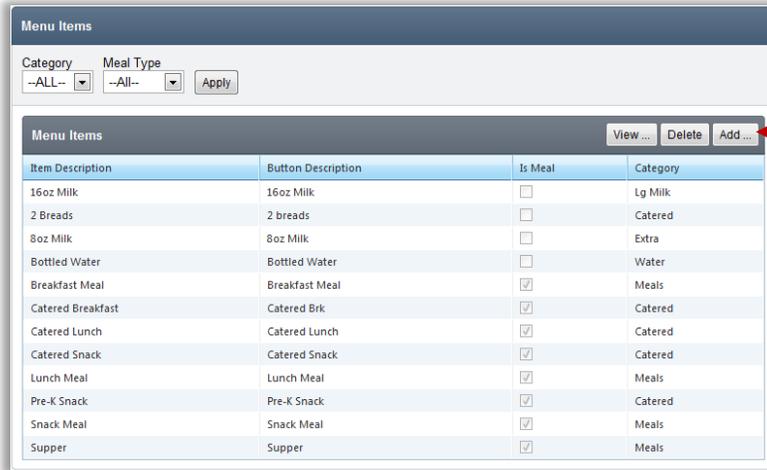
Category: --ALL-- Meal Type: --All-- Apply

Item Description	Button Description	Is Meal	Category
16oz Milk	16oz Milk	<input type="checkbox"/>	Lg Milk
2 Breads	2 breads	<input type="checkbox"/>	Catered
8oz Milk	8oz Milk	<input type="checkbox"/>	Extra
Bottled Water	Bottled Water	<input type="checkbox"/>	Water
Breakfast Meal	Breakfast Meal	<input checked="" type="checkbox"/>	Meals
Catered Breakfast	Catered Brk	<input checked="" type="checkbox"/>	Catered
Catered Lunch	Catered Lunch	<input checked="" type="checkbox"/>	Catered
Catered Snack	Catered Snack	<input checked="" type="checkbox"/>	Catered
Lunch Meal	Lunch Meal	<input checked="" type="checkbox"/>	Meals
Pre-K Snack	Pre-K Snack	<input checked="" type="checkbox"/>	Catered
Snack Meal	Snack Meal	<input checked="" type="checkbox"/>	Meals
Supper	Supper	<input checked="" type="checkbox"/>	Meals

On the *Menu Items* screen:

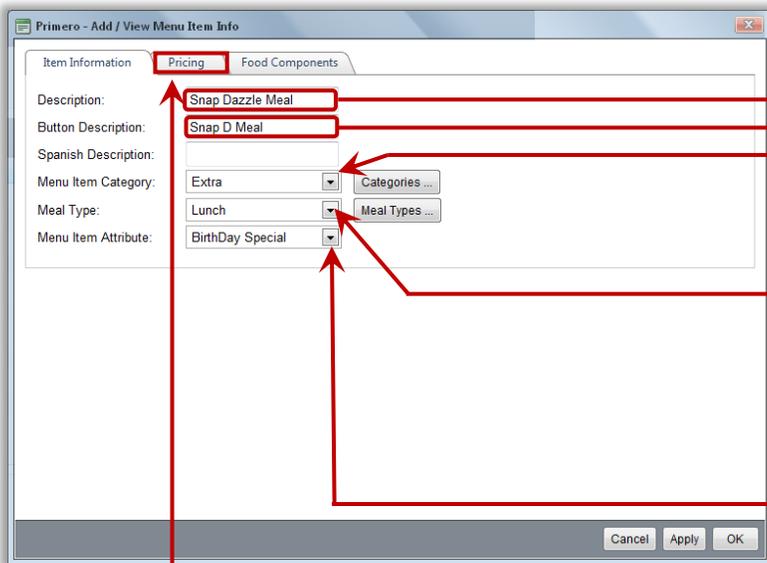
- By default, all existing menu items are displayed.
- View ...** displays the *Add/View Menu Item Info* dialog to allow changes to an existing menu item.
- Delete** removes the selected menu item.
- Add ...** displays the *Add/View Menu Item Info* dialog to add a new menu item.

Adding a New Menu Item



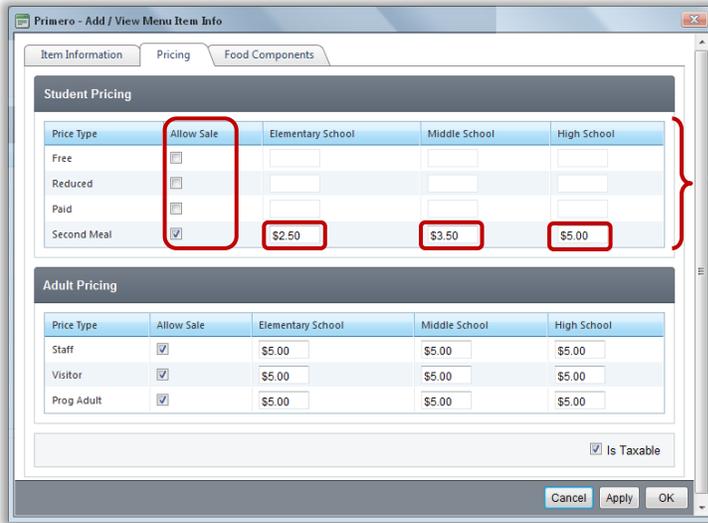
On the *Menu Items* screen:

- Click  .



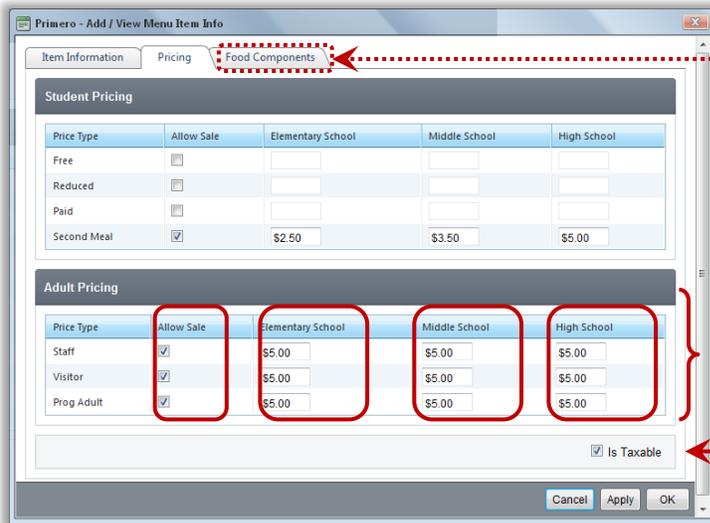
In the *Add/View Menu Item Info* dialog on the Item Information tab:

- In **Description**, enter a brief description of the item.
- In **Button Description**, enter a brief name for the item.
- In **Menu Item Category**, select a category.
- In **Meal Type**, select a type.
- In **Menu Item Attribute**, select an attribute.
- Click the **Pricing** tab.

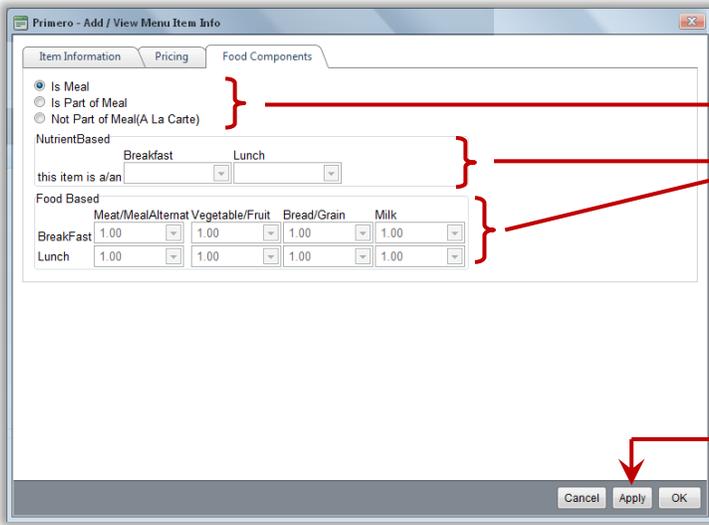


On the **Pricing** tab:

- In the **Student Pricing** group in **Allow Sale**, select for each price type that is allowed to purchase the new menu item and enter the corresponding price(s) in the **Elementary School**, **Middle School**, and **High School** fields.

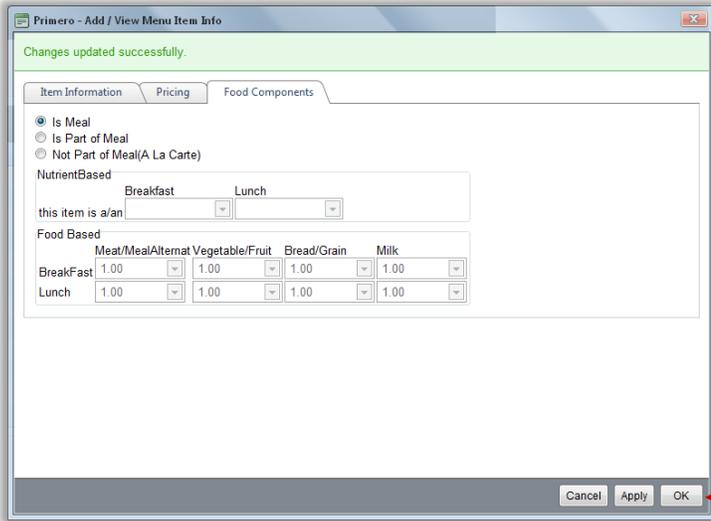


- In the **Adult Pricing** group in **Allow Sale**, select for each price type that is allowed to purchase the new menu item and enter the corresponding price(s) in the **Elementary School**, **Middle School**, and **High School** fields.
- In **Is Taxable**, select if the new menu item is a taxable item.
- Click the **Food Components** tab.



On the **Food Components** tab:

- Choose one meal option.
- If **Is Part of Meal** is selected, select the corresponding Nutrient *or* Food Based values for Breakfast and/or Lunch as appropriate.
- Click .



A success message appears.

- Click .

Changing Item Information for a Menu Item

Menu Items

Category: --ALL-- Meal Type: --All--

Item Description	Button Description	Is Meal	Category
16oz Milk	16oz Milk	<input type="checkbox"/>	Lg Milk
2 Breads	2 breads	<input type="checkbox"/>	Catered
8oz Milk	8oz Milk	<input type="checkbox"/>	Extra
Bottled Water	Bottled Water	<input type="checkbox"/>	Water
Breakfast Meal	Breakfast Meal	<input checked="" type="checkbox"/>	Meals
Catered Breakfast	Catered Brk	<input checked="" type="checkbox"/>	Catered
Catered Lunch	Catered Lunch	<input checked="" type="checkbox"/>	Catered
Catered Snack	Catered Snack	<input checked="" type="checkbox"/>	Catered
Lunch Meal	Lunch Meal	<input checked="" type="checkbox"/>	Meals
Pre-K Snack	Pre-K Snack	<input checked="" type="checkbox"/>	Catered
Snack Meal	Snack Meal	<input checked="" type="checkbox"/>	Meals
Snap Razzle Dazzle Meal	Snap Meal	<input checked="" type="checkbox"/>	Extra
Supper	Supper	<input checked="" type="checkbox"/>	Meals

On the *Menu Items* screen:

- In the **Menu Items** list, select an item to change.
- Click .

Primero - Add / View Menu Item Info

Item Information Pricing Food Components

Description: Snap Razzle Dazzle Meal

Button Description: Snap Meal

Spanish Description:

Menu Item Category: Extra

Meal Type: Lunch

Menu Item Attribute: BirthDay Special

In the *Add/View Menu Item Info* dialog:

- Make changes to the menu item information on the **Item Information** tab, as needed.

- Click .

Primero - Add / View Menu Item Info

Changes updated successfully.

Item Information Pricing Food Components

Description: Snap Razzle Dazzle Meal

Button Description: Snap Meal

Spanish Description:

Menu Item Category: Extra

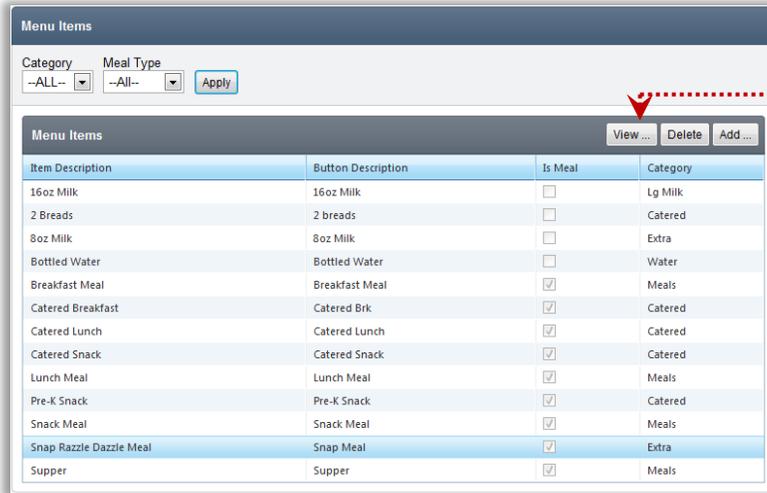
Meal Type: Lunch

Menu Item Attribute: BirthDay Special

A success message appears.

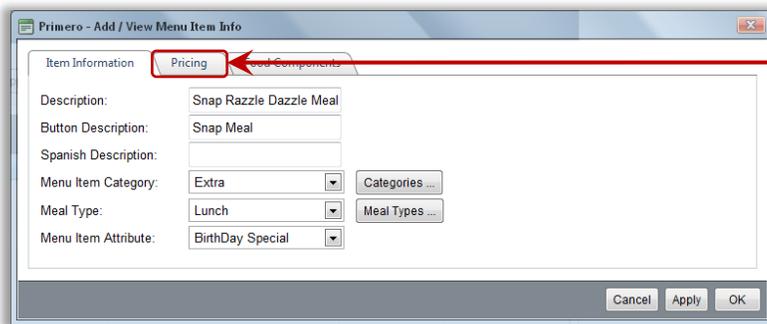
- Click .

Changing Menu Item Pricing



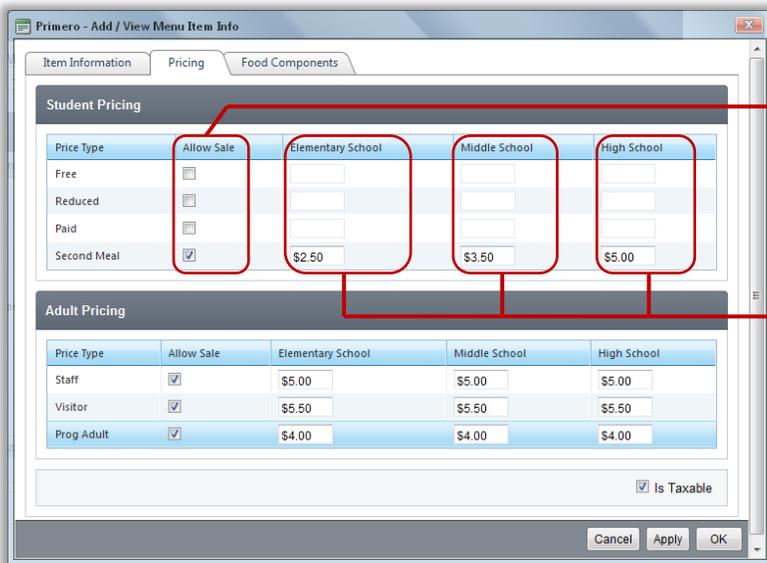
On the *Menu Items* screen:

- In the **Menu Items** list, select an item to change.
- Click **View ...**.



In the *Add / View Menu Item Info* dialog:

- Click the **Pricing** tab.



On the **Pricing** tab:

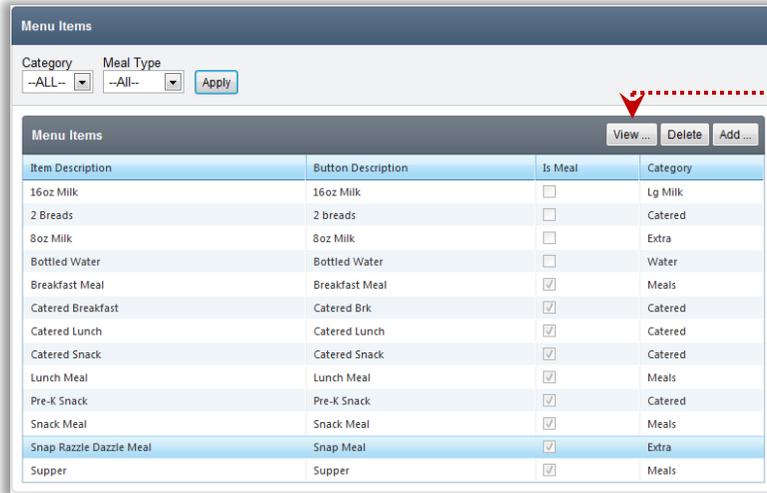
- In the **Student Pricing** group:
 - ★ Select or clear **Allow Sale** for one or more **Price Types**, if needed.
- ★ In **Elementary School**, **Middle School**, and **High School**, change or enter the item price, as needed.

- In the **Adult Pricing** group:
 - ★ Select or clear **Allow Sale** for one or more **Price Types**, if needed.
 - ★ In **Elementary School**, **Middle School**, and **High School**, change or enter the item price, as needed.
- Click .

A success message appears.

- Click .

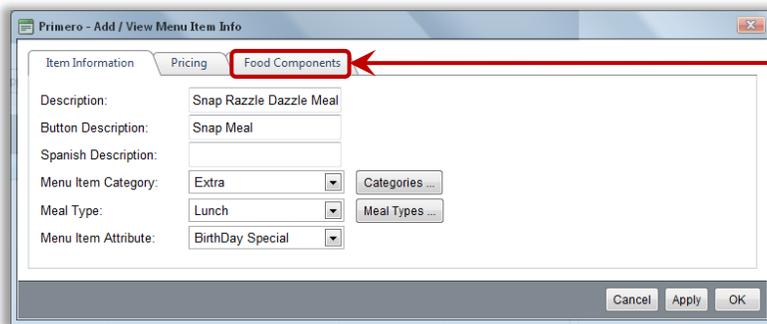
Changing Menu Item Food Components



On the *Menu Items* screen:

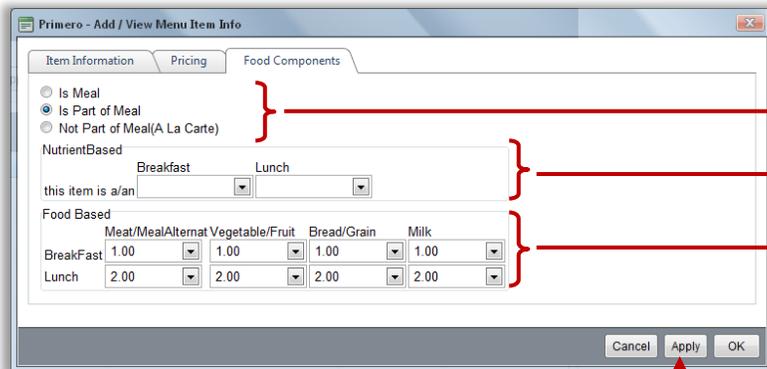
- In the **Menu Items** list, select an item to change.

- Click .



In the *Add / View Menu Item Info* dialog:

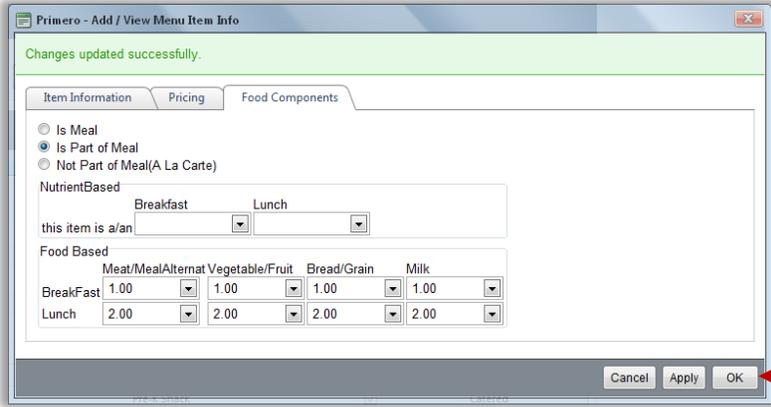
- Click the **Food Components** tab.



On the **Food Components** tab:

- Choose a new meal option, if needed.
- If **Is Part of Meal** is chosen, select the component(s) for the menu item in the corresponding meal basis group.

- Click .

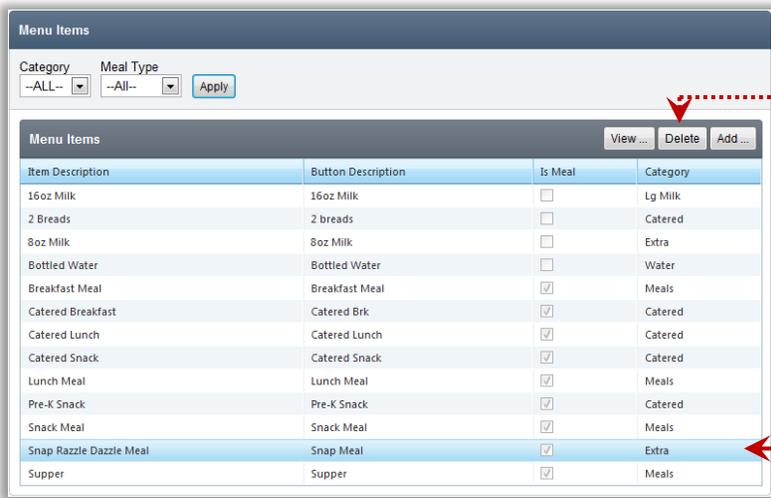


A success message appears.

In the *Add / View Menu Item Info* dialog:

Click .

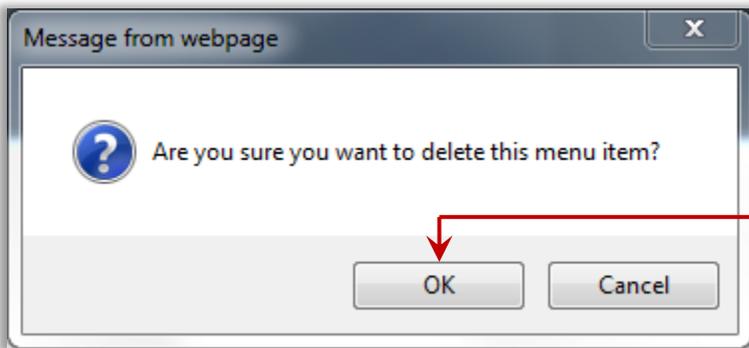
Deleting a Menu Item



On the *Menu Items* screen:

Select a menu item.

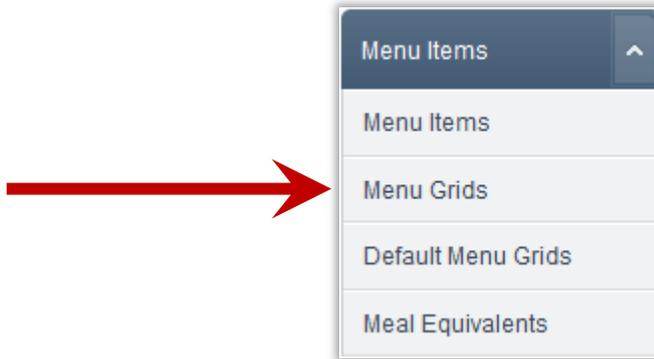
Click .



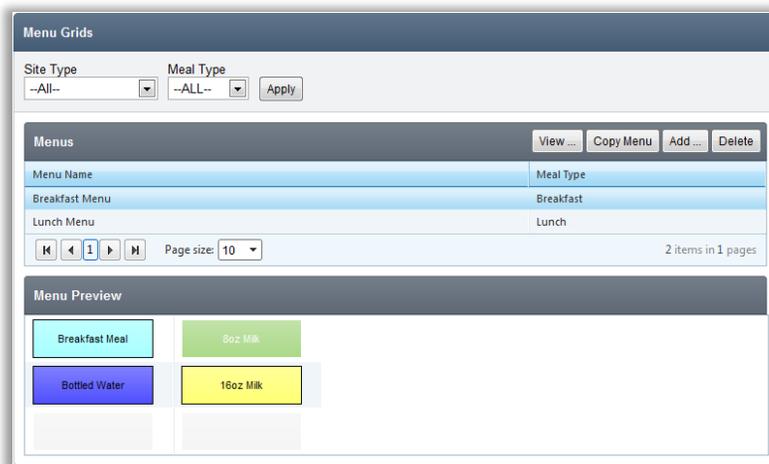
In the message dialog:

Click .

Topic: Menu Grids



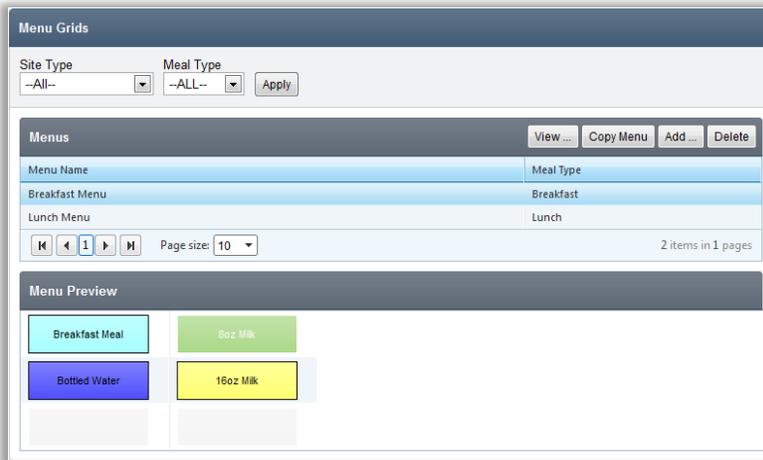
Menu Grids adds, removes, and changes menu contents.



On the *Menu Grids* screen:

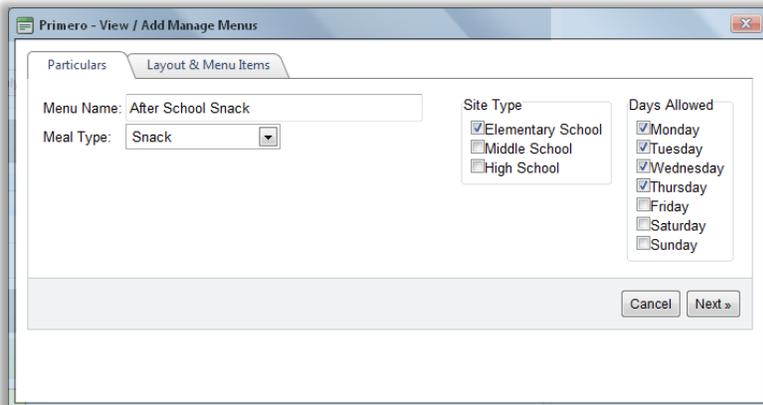
- By default, all existing menus are displayed.
- **View ...** displays the *View/Add Manage Menu* dialog to allow changes to an existing menu.
- **Delete** removes the selected menu.
- **Add ...** displays the *View/Add Manage Menu* dialog to add a new menu.

Adding a New Menu



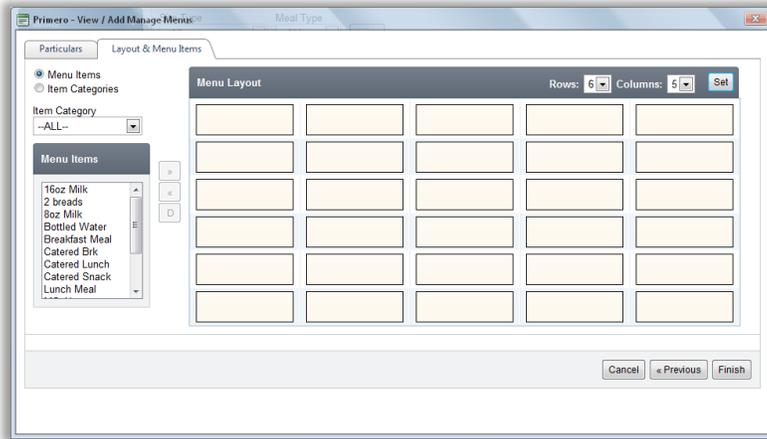
On the *Menu Grids* screen:

- Click  .



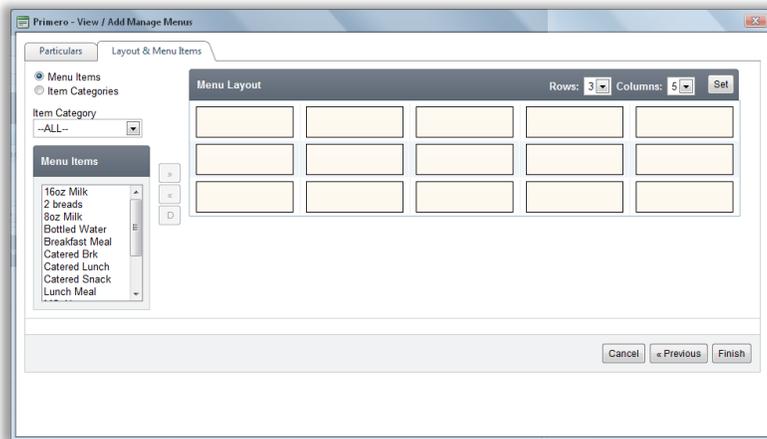
In the *View / Add Manage Menus* dialog on the **Particulars** tab:

- In **Menu Name**, enter a brief name for the new menu.
- In **Meal Type**, select a type.
- In **Site Type**, select one or more types.
- In **Days Allowed**, select one or more days on which the meal will be served.
- Click  .



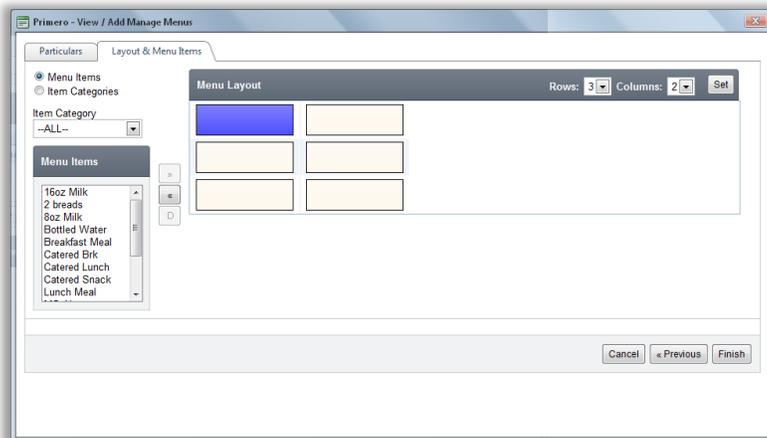
On the **Layout & Menu Item** tab:

- In **Rows**, select the number of rows to include in the menu grid.
- Click **Set**.

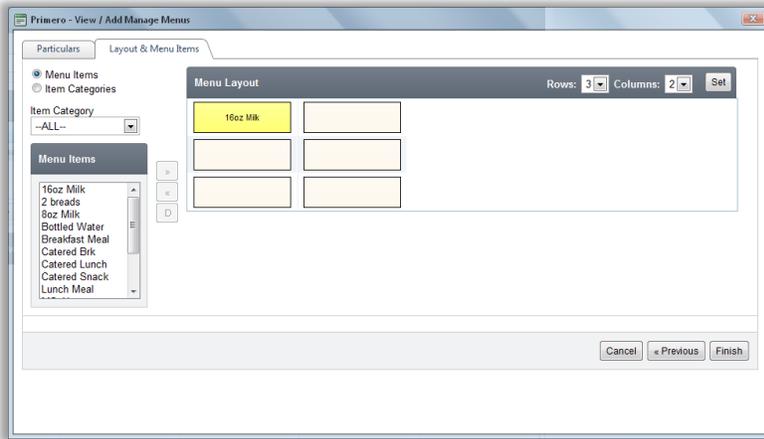


On the **Layout & Menu Item** tab:

- In **Columns**, select the number of columns to include in the menu grid.
- Click **Set**.



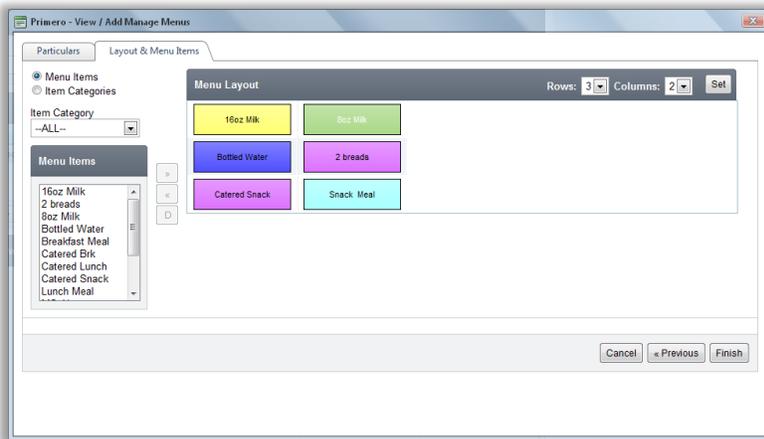
In the Menu Layout group, select a button. It changes color.



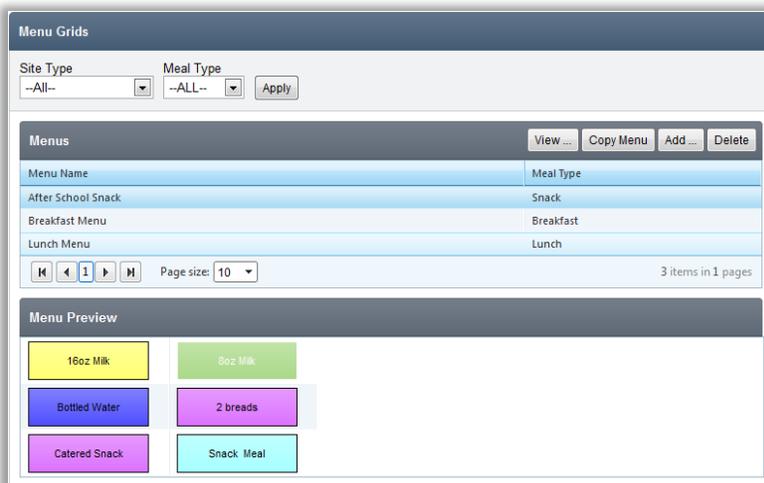
In the **Menu Items** list:

- Select an item.
- Click 

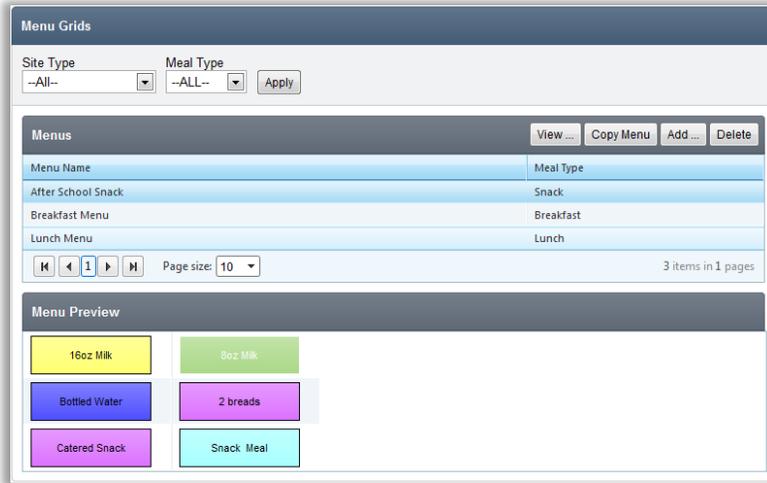
The selected menu item is now a button on the menu.



- Add more menu items as needed.
- Click  to remove a selected menu item from the menu layout.
- Click 

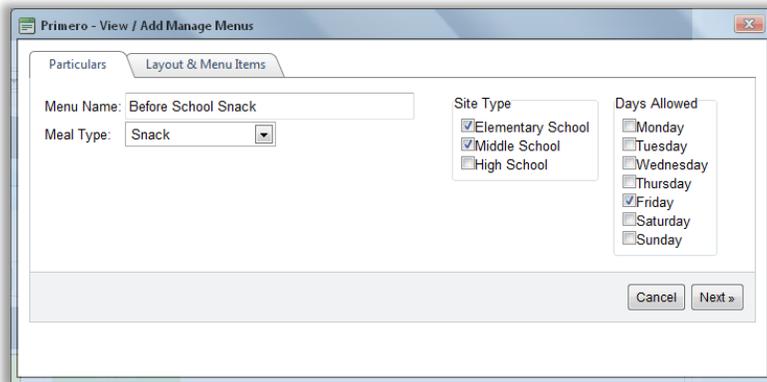


Changing a Menu



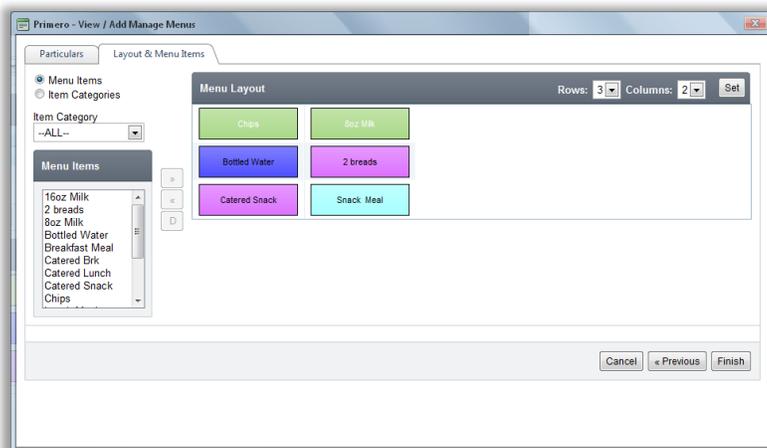
On the *Menu Grids* screen:

- In the **Menus** list, select a menu.
- Click .



On the **Particulars** tab:

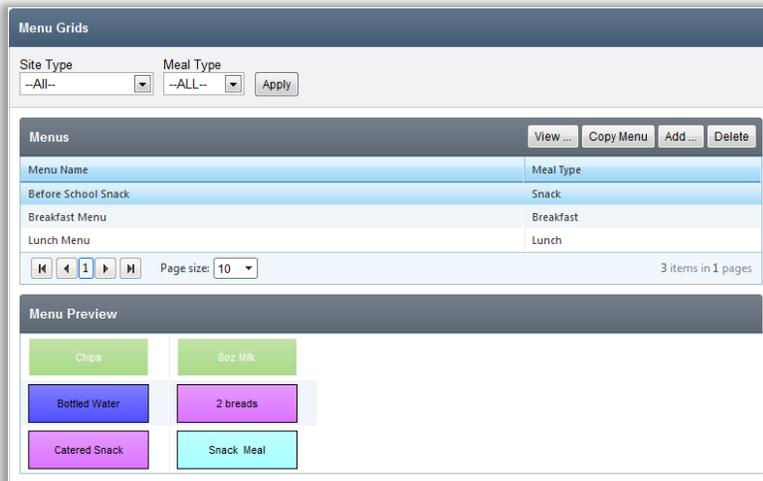
- In **Menu Name**, enter a new name, if needed.
- In **Meal Type**, select a different meal type, if needed.
- In **Site Type**, select or clear site types, as needed.
- In **Days Allowed**, select or clear days, as needed.
- Click .



On the **Layout & Menu Items** tab:

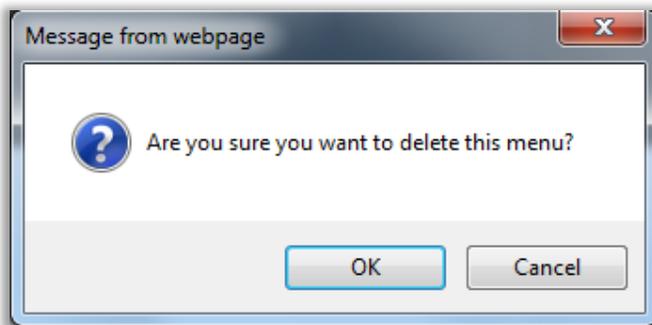
- Change buttons as needed.
- Add rows and/or columns as needed.
- Click .

Deleting a Menu



On the *Menu Grids* screen:

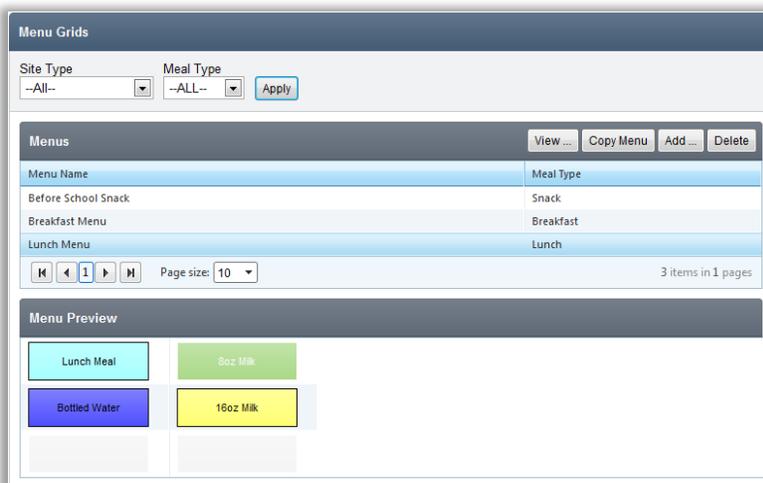
- In the **Menus** list, select a menu.
- Click  .



In the message dialog:

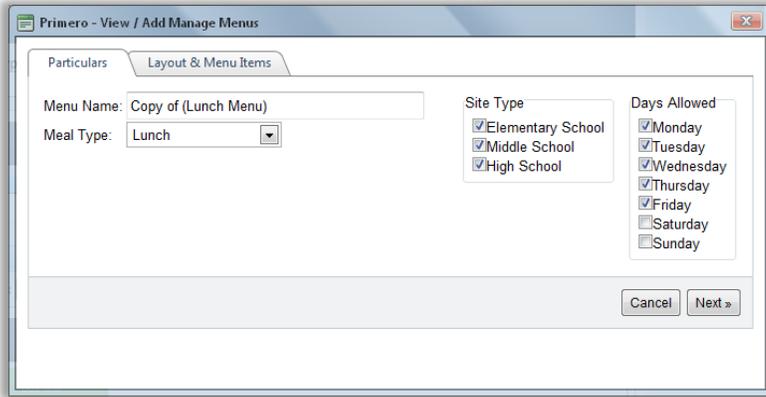
- Click  .

Copying a Menu



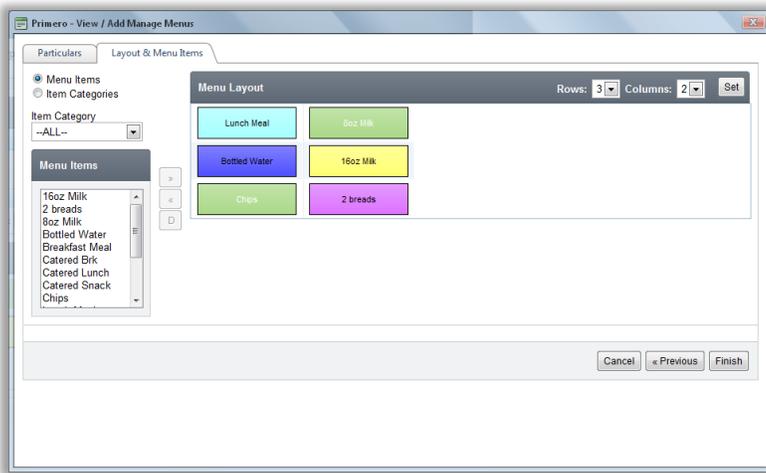
On the *Menu Grids* screen:

- In the **Menus** list, select a menu.
- Click  .



On the *View/Add Manage Menus* dialog on the **Particulars** tab:

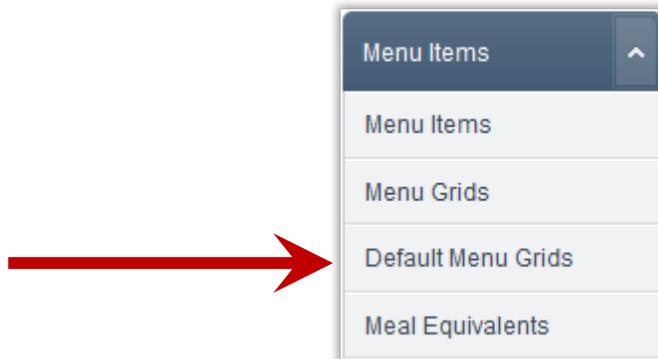
- In **Menu Name**, enter a brief name for the new menu.
- Make other changes to **Meal Type**, **Site Type**, and **Days Allowed** as needed.
- Click  .



On the **Layout & Menu Items** tab:

- Add or remove buttons.
- Add or remove menu items.
- Click  .

Topic: Default Menu Grids



Default Menu Grids adds, removes, and changes menus available for use by POS terminals.

Default Menu Grids

Site Type: --ALL-- Meal Type: --ALL-- Day: --ALL--

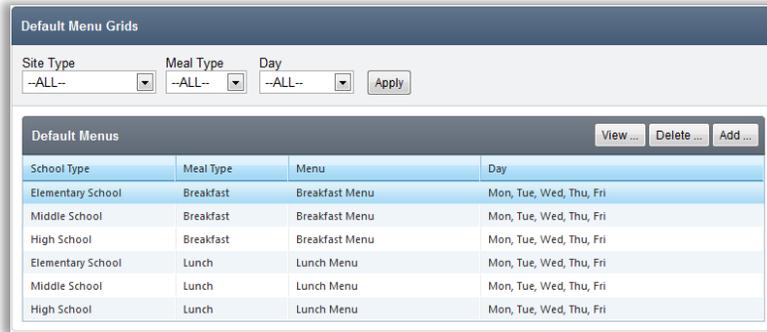
School Type	Meal Type	Menu	Day
Elementary School	Breakfast	Breakfast Menu	Mon, Tue, Wed, Thu, Fri
Middle School	Breakfast	Breakfast Menu	Mon, Tue, Wed, Thu, Fri
High School	Breakfast	Breakfast Menu	Mon, Tue, Wed, Thu, Fri
Elementary School	Lunch	Lunch Menu	Mon, Tue, Wed, Thu, Fri
Middle School	Lunch	Lunch Menu	Mon, Tue, Wed, Thu, Fri
High School	Lunch	Lunch Menu	Mon, Tue, Wed, Thu, Fri

View ... Delete ... Add ...

On the *Default Menu Grids* screen:

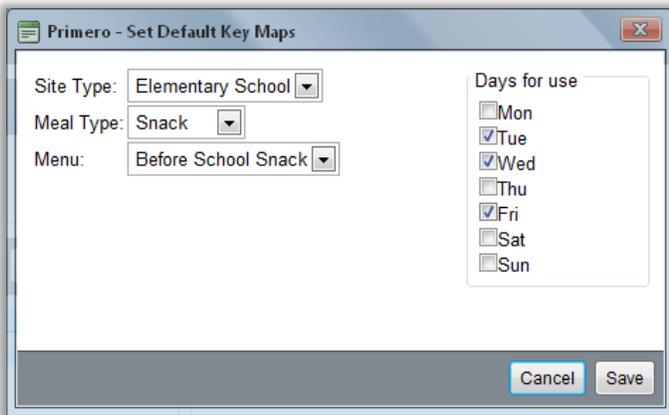
- By default, all existing menus are displayed.
- refreshes the screen to display all items that meet the selected conditions.
- displays the *Set Default Key Maps* dialog to allow changes to an existing default menu.
- removes the selected menu.
- displays the *Set Default Key Maps* dialog to add a new menu.

Adding a Default Menu Grid



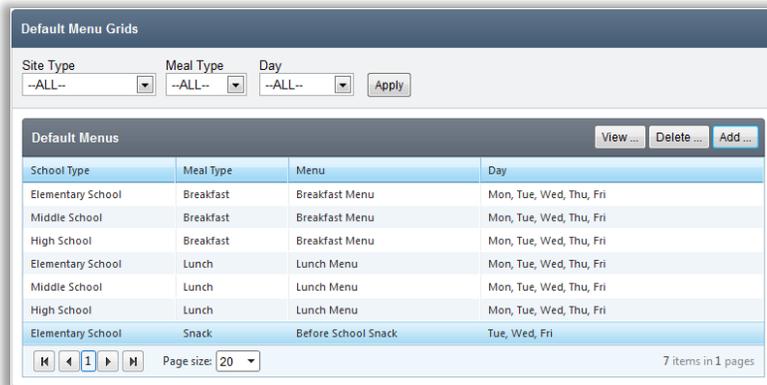
On the *Default Menu Grids* screen:

- Click  .



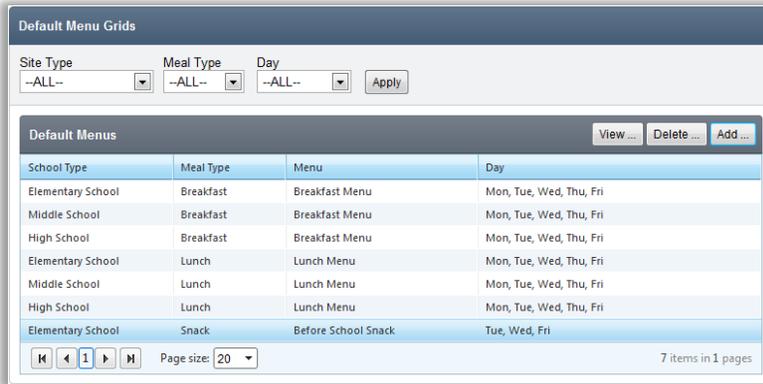
In the *Set Default Key Maps* dialog:

- In **Site Type**, select a type.
- In **Meal Type**, select a type.
- In **Menu**, select a menu.
- In the **Days for use** group, select or clear days of the week.
- Click  .



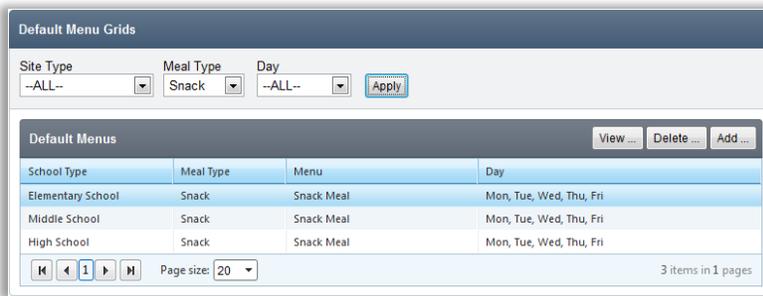
The new default menu grid appears in the **Default Menus** list.

Changing a Default Menu Grid



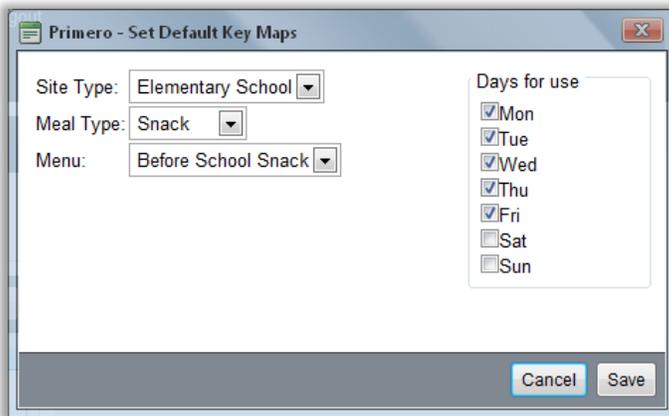
On the *Default Menu Grids* screen:

- In **Site Type**, select a site.
- In **Meal Type**, select a meal type.
- In **Day**, select a day.
- Click .
-



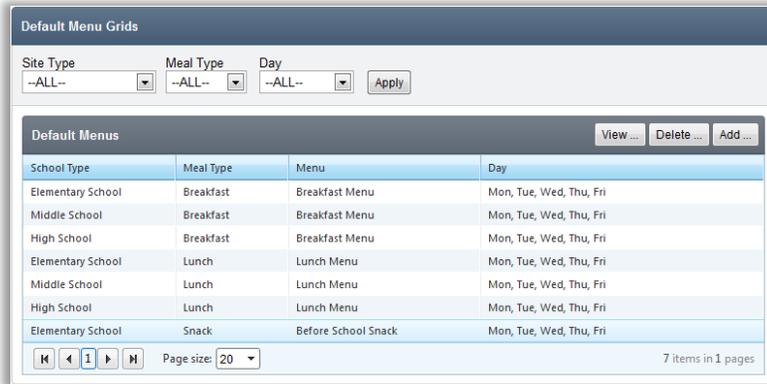
In the **Default Menus** list:

- Select a menu.
- Click .



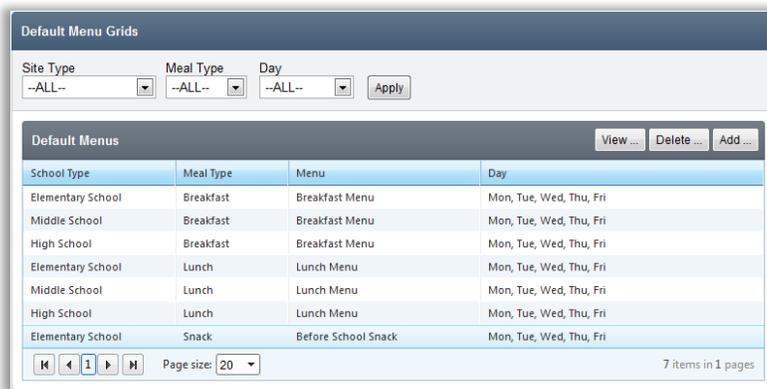
In the *Set Default Key Maps* dialog:

- In **Site Type**, **Meal Type**, and **Menu**, select new types or menu, as needed.
- In **Days for use**, select or clear days, as needed.
- Click .



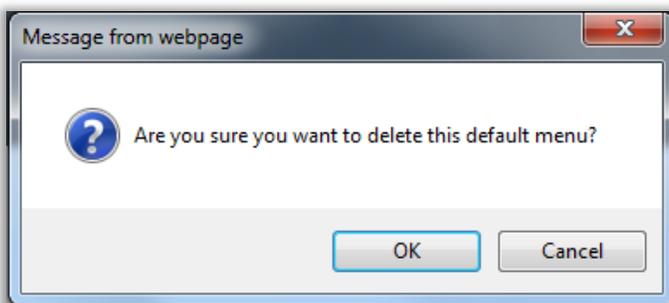
On the *Default Menu Grids* screen, changes are displayed.

Deleting a Default Menu Grid



On the *Default Menu Grids* screen:

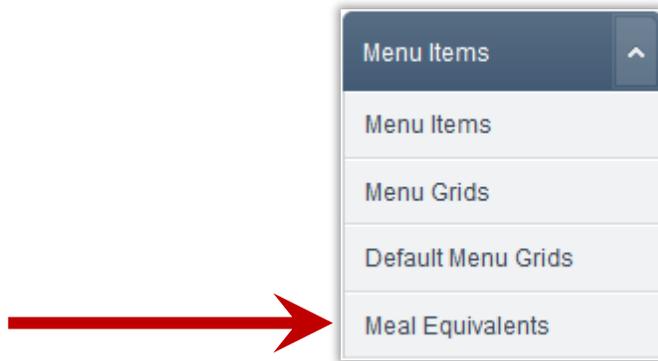
- Click  .



In the message dialog:

- Click  .

Topic: Meal Equivalents



Meal Equivalents sets or changes the number of local school meals that are equivalent to a reimbursable meal. This allows a district to receive reimbursement for meal served.

 The 'Meal Equivalents' configuration screen. At the top, it shows 'Fiscal Year' with a dropdown menu set to '2011 - 2012' and an 'Apply' button. Below this is a table with the following rows:

Meal Equivalents		Edit
<input type="text"/>	Breakfast(s) is equivalent to	<input type="text"/> meal(s).
<input type="text"/>	Lunch(s) is equivalent to	<input type="text"/> meal(s).
<input type="text"/>	Snack(s) is equivalent to	<input type="text"/> meal(s).
<input type="text"/>	Dinner(s) is equivalent to	<input type="text"/> meal(s).
<input type="text"/>	Supper(s) is equivalent to	<input type="text"/> meal(s).
\$ <input type="text"/>	A La Carte amount is equivalent to	<input type="text"/> meal(s).

On the *Meal Equivalents* screen:

- By default, all existing equivalencies are displayed.
- refreshes the screen to display all items that meet the selected conditions.
- allows for creating new equivalencies or changing existing equivalencies.

Adding Meal Equivalents

The screenshot shows the 'Meal Equivalents' screen. At the top, there is a 'Fiscal Year' dropdown menu set to '2011 - 2012' and an 'Apply' button. Below this is a table with five rows for 'Breakfast(s)', 'Lunch(s)', 'Snack(s)', 'Dinner(s)', and 'Supper(s)', each followed by 'is equivalent to' and an empty input field, and then 'meal(s)'. At the bottom, there is a row for 'A La Carte amount' with a '\$' symbol, an empty input field, 'is equivalent to', an empty input field, and 'meal(s)'. An 'Edit' button is located in the top right corner of the table area.

On the *Meal Equivalents* screen:

- In **Fiscal Year**, select a year.
- Click .
- Click .

This screenshot shows the 'Meal Equivalents' screen with values entered. The 'Fiscal Year' is still '2011 - 2012'. The table now has the following values: Breakfast (1.5), Lunch (1), Snack (2), Dinner (1), Supper (1.5), and A La Carte amount (\$ 2.00). Each row also has a '1' in the second input field. The 'Edit' button is replaced by 'Cancel' and 'Save' buttons.

In the **Meal Equivalents** group:

- For the first five listings (Breakfast, Lunch, Snack, Dinner and Supper), enter:
 - ★ The local meal count, and
 - ★ The reimbursable meal equivalent count.
- For the last listing (A La Carte) enter:
 - ★ A dollar amount, and
 - ★ The reimbursable meal equivalent count.
- Click .

This screenshot shows the 'Meal Equivalents' screen with a green success message at the top: 'The meal equivalents have been saved successfully'. The screen content is identical to the previous screenshot, showing the 'Meal Equivalents' table with the same values and the 'Save' button.

A success message appears.

Changing Meal Equivalents

Meal Equivalents

Fiscal Year: 2010 - 2011 [Apply]

Meal Type	Equivalent Count	Unit
Breakfast(s)	1.50	meal(s)
Lunch(s)	1.00	meal(s)
Snack(s)	2.00	meal(s)
Dinner(s)	1.00	meal(s)
Supper(s)	1.50	meal(s)
A La Carte amount	\$ 2.00	meal(s)

On the *Meal Equivalents* screen:

- In **Fiscal Year**, select a year.
- Click .
- Click .

Meal Equivalents

Fiscal Year: 2010 - 2011 [Apply]

Meal Type	Equivalent Count	Unit
Breakfast(s)	1.50	meal(s)
Lunch(s)	1.00	meal(s)
Snack(s)	2.00	meal(s)
Dinner(s)	1.00	meal(s)
Supper(s)	1.50	meal(s)
A La Carte amount	\$ 1.50	meal(s)

In the **Meal Equivalents** group:

- For the first five listings (Breakfast, Lunch, Snack, Dinner and Supper), make changes to the local meal count and the reimbursable meal equivalent count, as needed.
- For the last listing (A La Carte) make changes to the dollar amount and the reimbursable meal equivalent count, as needed.
- Click .

The meal equivalents have been saved successfully

Meal Equivalents

Fiscal Year: 2010 - 2011 [Apply]

Meal Type	Equivalent Count	Unit
Breakfast(s)	1.50	meal(s)
Lunch(s)	1.00	meal(s)
Snack(s)	2.00	meal(s)
Dinner(s)	1.00	meal(s)
Supper(s)	1.50	meal(s)
A La Carte amount	\$ 1.50	meal(s)

A success message appears.

Chapter 7: [POS] Management

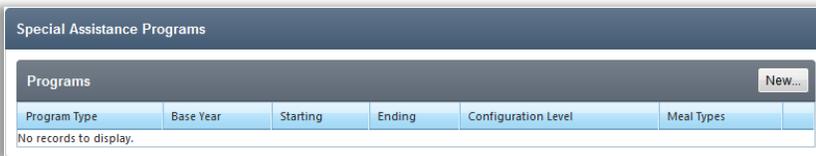
Topic: Special Assistance Programs



Special Assistance Programs

Provision 1 — at least 80 percent of the children enrolled are eligible for free or reduced price meals to certify children eligible for free meals for a 2 year period. Schools continue to take daily meal counts of the number of meals served to children by type as the basis for calculating reimbursement claims.

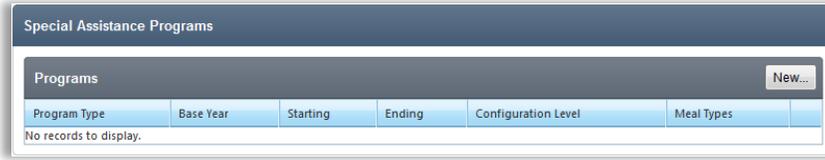
Provision 2 — requires that the school serve meals to participating children at no charge but reduces application burdens to once every 4 years and simplifies meal counting and claiming procedures by allowing a school to receive meal reimbursement based on claiming percentages. Additional 4-year extensions to Provision 2 are possible when certain conditions are met.



On the *Special Assistance Programs* screen:

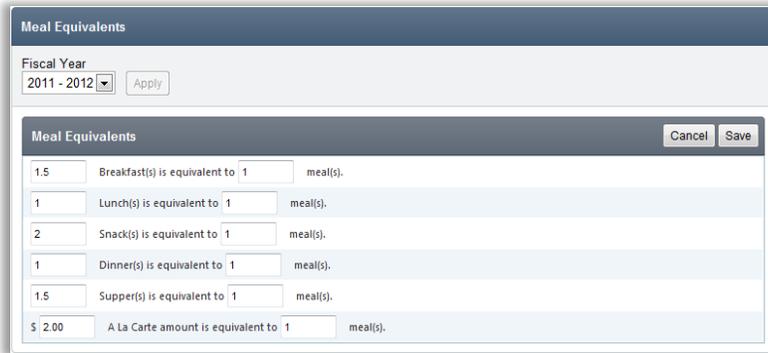
- No default selections are made.

Adding a New Provision



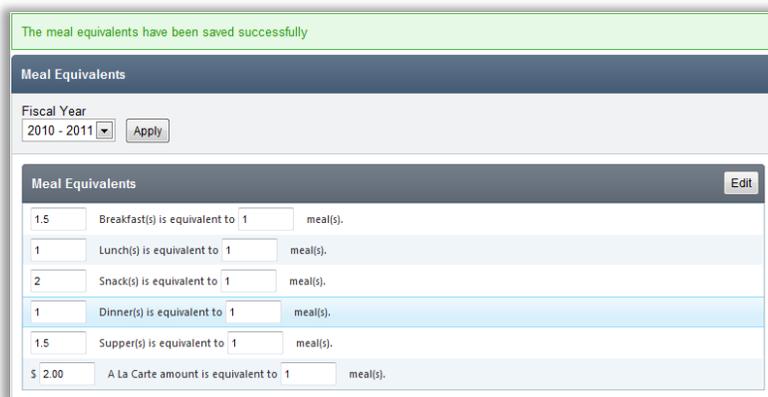
On the *Special Assistance Programs* screen:

- Click .



In the **Meal Equivalents** group:

- For the first five listings (Breakfast, Lunch, Snack, Dinner and Supper), enter:
 - ★ The local meal count, and
 - ★ The reimbursable meal equivalent count.
- For the last listing (A La Carte) enter:
 - ★ A dollar amount, and
 - ★ The reimbursable meal equivalent count.
- Click .



A success message appears.

Appendix A: Free & Reduced Eligibility Permissions

Module: Free & Reduced Eligibility (FRE)

The Free & Reduced Eligibility module includes six (6) categories of options which are described in the table below.

Table A.2: Free & Reduced Eligibility Options

Category: Administration	
<input checked="" type="checkbox"/>	Household Letters <i>Allows access to printing letters to Households</i>
Category: Applications	
<input checked="" type="checkbox"/>	Direct Approval <i>Allows user to process applications with the Direct Certification process, either manually or through file importation</i>
<input checked="" type="checkbox"/>	FRE Master Index <i>Allows user to access the Master Index function that is used to quickly search for an application</i>
<input checked="" type="checkbox"/>	FRE Temporary Approvals <i>Allows user to tag an application with a temporary approval</i>
<input checked="" type="checkbox"/>	Remove Application From A Batch <i>Allows user to remove an application from the current batch</i>
<input checked="" type="checkbox"/>	Smart Bin <i>Allows user to access the Smart Bin function that is used to manage</i>

Category: Compliance

- Is Auditor
Allows access to auditing functions
- Manage Auditors
Allows management of auditor functions

Category: Online Application

- Online Apps Administrator
Allows access to manage online applications collected through Parent Online web site

Category: Reports

- Alaska PFD Amount
*** For Alaska Districts only**
- Audit
Allows a user to generate an Audit CD
- Change Eligibility Status
Allows user to change students' eligibility status
NOTE: To perform this function user must allow be allowed to Edit Student Details in the System module.
- Delete Batch
Allows user to delete a scanned batch
- Direct Approvals
Allows users to process Direct Approvals
- Direct Certification
Allows user to import Direct Certification lists from the state

-
- Export Notifications
Allows for export of notification letters in a file

 - Force Check In A Batch
Allows user to override a checked-out batch in Validation and Notification functions

 - FRE Configuration Settings
Allows user to configure FRE settings

 - FRE Reports
Allows user to access FRE Reports

 - Grace Period Letters
Allows access to generation of Grace Period letters

 - Import application information
Allows user to import application information

 - Manage Editable Letters
Allows user to modify FRE Notification Letters

 - Map Forms
*** Leave cleared for district users**
Allows Cybersoft to map forms

 - Master Index
Allows user to access the Master Index to quickly search for an application

 - Online Application Letters
Allows access to generation of Online Application letters

 - Pre Approve Applications
*** Pre Approval Districts only; all others leave cleared**
Allows user to enter application details for Pre Approval
-

-
- Pre Approved No ID List
*** Pre Approval Districts only; all others leave cleared**
Allows user to add student to No ID List
-
- Pre Approval Delete No ID Student
*** Pre Approval Districts only; all others leave cleared**
Allows user to delete No ID students
-
- Pre Approval Modify Application
*** Pre Approval Districts only; all others leave cleared**
Allows user to
-
- Pre Approval Modify No ID Student
*** Pre Approval Districts only; all others leave cleared**
Allows user to modify No ID students
-
- Pre App Change School for Application
*** Pre Approval Districts only; all others leave cleared**
Allows user to
-
- Pre App Change School for No ID Student
*** Pre Approval Districts only; all others leave cleared**
Allows user to change NO ID student's school
-
- Print Application Image From Tracking
Allows user to print Application Images in FRE Verification Tracking
-
- Process
Allows user to update applications
-
- Reduced Meal Rates
Allows user to configure Reduced Meal Rates
-
- Scan
Allows user to scan FRE applications
-
- Send Notification
Allows user to send Notification letters after Validation is complete
-

<input checked="" type="checkbox"/>	Sibling Status Report * Pre Approval Districts only; all others leave cleared <i>Allows user to</i>
<input checked="" type="checkbox"/>	Smart Bin <i>Allows user to place applications in the Smart Bin</i>
<input checked="" type="checkbox"/>	Student Application Search
<input checked="" type="checkbox"/>	Students on hold <i>Allows user to place students on hold</i>
<input checked="" type="checkbox"/>	Temporary Applications <i>Allows user to process Temporary Approvals</i>
<input checked="" type="checkbox"/>	Tracking <i>Allows users to track responses from the Verification sample list</i>
<input checked="" type="checkbox"/>	Validate <i>Allows users to validate scanned applications</i>
<input checked="" type="checkbox"/>	Verification Sampling <i>Allows user to generate a Verification sample</i>
<input checked="" type="checkbox"/>	Verify <i>Allows user to validate processed applications that have been selected for verification</i>

Category: Students

<input checked="" type="checkbox"/>	FRE Scan <i>Allows access to scanning of FRE applications</i>
-------------------------------------	--

Appendix B:

Inventory Permissions

Module: Inventory

The Inventory module includes six (6) categories of options which are described in the table below.

Table A.3: Inventory Options

Category: Central Warehouse - when this category is selected, the following functions are available on the Central Warehouse menu:			
Distribution	Physical Inventory	Warehouse Map	Replenishment
Warehouse Tickets	Inventory Adjustments	Bin Transfers	Put Away
Par Level Ordering	Withdrawals	Bin Transactions	Transfers
Set Par Levels	Withdraw Items	Bin Inventory	Transfer Items
Routes	Delivery Templates	Shipping Groups	



Create/Update Pick Delivery Tickets

Allows access to generation of warehouse Pick and Delivery tickets



Manage Routes

Allows for creating and managing delivery templates and routes;

When this option is selected (check mark added), the following functions are available:

Inventory > Central Warehouse > Delivery Templates

Inventory > Central Warehouse > Routes



Manage Warehouse Map

Allows for creating and managing bins in a central warehouse ;

When this option is selected (check mark added), the following function is available:

Inventory > Central Warehouse > Warehouse Map



Par Level Orders

Allows access to set Par Levels and to generate Par Level orders;

When this option is selected (check mark added), the following functions are available:

Inventory > Central Warehouse > Par Level Ordering

Inventory > Central Warehouse > Set Par Levels



Print Distribution Tickets

Allows access to print Pick and Delivery tickets;

When this option is selected (check mark added), the following function is available:

Inventory > Central Warehouse > Warehouse Tickets

*When this option is cleared (check mark removed), Pick and Delivery tickets can be printed through the **Distribution** function*

**Warehouse Bin Transfer**

Allows for performing transfer of items between warehouse bins, performing a bin inventory, and viewing all bin transactions including transfers, put aways and production pulls (Central Kitchen);

When this option is selected (check mark added), the following functions are available:

Inventory > Central Warehouse > Bin Transfers

Inventory > Central Warehouse > Bin Transactions

Inventory > Central Warehouse > Bin Inventory

**Warehouse Distribution**

Allows access to distribution functions for a warehouse site;

When this option is selected (check mark added), the following functions is available:

Inventory > Central Warehouse > Distribution

*When this option is cleared (check mark removed), Pick and Delivery tickets can be printed through the **Warehouse Tickets** function, when available;*

**Warehouse Inventory Adjustment**

Allows for adding, removing or managing items or item quantities in a central warehouse inventory;

When this option is selected (check mark added), the following function is available:

Inventory > Central Warehouse > Inventory Adjustments

**Warehouse Physical Inventory**

Allows for performing a Physical inventory for a central warehouse site;

When this option is selected (check mark added), the following function is available:

Inventory > Central Warehouse > Physical Inventory

**Warehouse Put Away**

Allows for performing Put Aways of inventory items in bins in a central warehouse;

When this option is selected (check mark added), the following function is available:

Inventory > Central Warehouse > Put Away

**Warehouse Replenishment**

Allows for moving inventory from Fixed bins to Pick bins at a warehouse site;

When this option is selected (check mark added), the following function is available:

Inventory > Central Warehouse > Replenishment

**Warehouse Withdrawals and Transfers**

Allows for creating inventory Withdrawals and Transfers at a warehouse site;

When this option is selected (check mark added), the following functions are available:

Inventory > Central Warehouse > Withdrawals

Inventory > Central Warehouse > Withdraw Items

Inventory > Central Warehouse > Transfers

Inventory > Central Warehouse > Transfer Items

Category: Configuration – when this category is selected, the following functions are available on the Configuration menu:

Vendors, Quick Price Change, Items, Review Settings, Item Categories, Valuation Groups, EOrder Setting, Item Storage Categories



Order guide setup

Available in future release



Manage E Order Settings

Allows access to create and manage electronic order settings;

When this option is selected (check mark added), the following function is available:

Inventory > Configuration > EOrder Setting



Manage Ordering Groups

Available in future release



Manage Items

Allows access to create and manage item records and item categories;

When this option is selected (check mark added), the following functions are available:

Inventory > Configuration > Items

Inventory > Configuration > Item Categories

Inventory > Configuration > Quick Price Change



Manage Review Settings

Allows access to create and manage order review settings;

When this option is selected (check mark added), the following function is available:

Inventory > Configuration > Review Settings



Manage Storage Item Categories

Allows access to create and manage storage item categories;

When this option is selected (check mark added), the following function is available:

Inventory > Configuration > Item Storage Categories



Manage Valuation Groups

Allows access to create and manage valuation groups;

When this option is selected (check mark added), the following function is available:

Inventory > Configuration > Valuation Groups



Manage Vendors

Allows access to create and manage vendor records;

When this option is selected (check mark added), the following function is available:

Inventory > Configuration > Vendors

Category: Inventory - when all options in this category are selected, the following functions are available on the Inventory menu:

Perpetual Inventory Physical Inventory Physical Inventory Status

When all options in this category are selected, the following functions are available on the Configuration menu:

Inventory Periods



Capture Physical Inventory

Allows for entering details of and viewing the status of a Physical inventory;

*When this option is selected (check mark added), the user can start, save, change, and reconcile a **pending** inventory; however, a reconciled inventory cannot be modified.*

Inventory > Inventory > Physical Inventory

Inventory > Inventory > Physical Inventory Status



Modify reconciled physical inventory

Allows for changing details of a Physical inventory that has been reconciled;

When this option is selected (check mark added), the Physical Inventory Reconciliation screen offers the button/function;

*When this option is cleared (check mark removed), a **pending** physical inventory can be modified with the button/function;*



Reconcile Physical Inventory

Allows for reconciling a Physical inventory;

When this option is selected (check mark added), the Physical Inventory Reconciliation screen offers the button/function; also, the following function is available:

Inventory > Configuration > Inventory Periods



View Perpetual Inventory

Allows for displaying a perpetual site inventory;

When this option is selected, the following function is available:

Inventory > Inventory > Perpetual Inventory

Category: Ordering

- Adjust Receive
Allows for adjusting quantities and pricing on received orders

- Adjust Receiving Price
Allows for changing pricing data on received orders

- Edit Open Orders
Allows for changing orders in an Open status

- Generate EOrders
Allows access to generation of electronic orders

- Manage Emergency Orders
Allows creation of emergency orders

- Manage Ordering Groups

- Manage Orders
*Allows for creating, viewing and changing orders
(POS > Ordering)*

- Merge Orders
Allows for merging orders to the same vendor

- Override Delivery Schedule
Allows for changing the standard delivery date on an order

- Receive Items
Allows access to receive items for an order

- Release Daily Limit Exceptions

- Review Orders
Allows access to review orders created by other locations

- Switch Order View
Allows for changing order view from List view to Order Guide view



View Order Available Quantity Details

Allows for display of available quantities on hand when creating or changing an order

Category: Reports – When this option is selected (check mark added), the following reports are available:

Print Orders	Inventory Valuation	Purchases
Item History	Item Inventory	Discrepancy
Transfers	Usage	Transaction History



Export Inventory valuation

Allows access to create file with inventory valuation data



Generate On Demand Reports

Allows for generation of on-demand reports



Reports

*Allows for displaying the **Reports** menu;*

When this option is selected, the following reports are available:

Print Orders	Inventory Valuation	Purchases
Item History	Item Inventory	Discrepancy
Transfers	Usage	Transaction History

Category: Transfers/Withdrawals – When all options in this category are selected, the following functions are available on the:

Transfers/Withdrawals menu:

Transfers	Withdrawals	Inventory Additions
Transfer Items	Withdraw Items	Add To Inventory
	Std Withdraw List	

Configuration menu:

Withdrawal Reasons	Std withdrawal Templates
--------------------	--------------------------

Reports menu:

Transaction History	Withdrawal List
---------------------	-----------------

- Add To Inventory
Allows access to create inventory additions
- Adjust Add To Inventory
Allows access to change inventory additions
- Adjust Simple Transfer
Allows access to change inventory transfers
- Adjust Withdrawal
Allows access to change inventory withdrawal items and quantities
- Cancel Add To Inventory
Allows access to add items to inventory
- CANCEL Simple Transfer
Allows access to cancel inventory transfers
- Cancel Withdrawals
Allows access to cancel inventory withdrawals
- Manage Withdrawal Templates
Allows access to update withdrawal templates
- Manage Withdrawals
Allows access to display inventory withdrawals
- Transfer Items
Allows creation of inventory transfers



View Transfers

Allows for display of transfers

Appendix C:

Point of Service Permissions

Module: Point of Service

The Point of Service (POS) module includes five (5) categories of options which are described in the table below.

Table A.4: Point of Service (POS) Options

Category: Administration	
<input checked="" type="checkbox"/>	Accounts <i>Allows access to the Account Information screen</i>
<input checked="" type="checkbox"/>	Accounts Receivable Ageing
<input checked="" type="checkbox"/>	Add menu item in sale adjustment <i>Allows for addition of menu item to a previous sale</i>
<input checked="" type="checkbox"/>	Add New Student <i>Allows for adding a new student (POS > Patrons > Students > Add)</i>
<input checked="" type="checkbox"/>	Add Transactions
<input checked="" type="checkbox"/>	Adjust session beyond max amount <i>Allows for adjusting session for amount that exceeds preset reconciliation threshold</i>
<input checked="" type="checkbox"/>	Allow reconciled and deposited option
<input checked="" type="checkbox"/>	Approve POS Accounts
<input checked="" type="checkbox"/>	Assign New PIN <i>Allows for assigning new PIN (POS > Patrons > Students > Particulars tab)</i>
<input checked="" type="checkbox"/>	Auto Reconcile <i>Allows auto reconcile of sessions within the auto reconcile amount range</i>

-
- Bank Deposits Summary
*Allows access to the Summary option on the Bank Deposits report
(POS > Business Reports > Bank Deposits > Summary options)*

 - Benefits Issuance
Allows access to the Benefits Issuance report

 - Bulk adjustment
Allows for making adjustments to multiple sales

 - Can Add Balance After Live
*Allows for adding a beginning student balance after the student's school is using
PrimeroEdge*

 - Can Adjust Amount
*Allows for adjusting account balances
(POS > Patrons > Accounts > Adjust Account)*

 - Can Adjust Deposit Slip
Allows for adjusting deposit slips

 - Can close POS from website
Allows for closing POS session from website

 - Can generate POS sales invoice
Allows for generation of POS sales invoice

 - Can Join and Split Persons
Allows for joining or splitting sibling accounts

 - Can Refund Amount
*Allows for refunding on account balances
(POS > Patrons > Accounts > Refund)*

- Can Return Check
*Allows for processing returned checks
(POS > Patrons > Accounts > Return Check)*
-
- Can Transfer Funds
*Allows for transferring funds from one student account to another
(POS > Patrons > Accounts > Transfer Funds)*
-
- Change price in reconcile transaction
*Allows changing items in sale during reconciliation
(POS > Administration > Reconciliation > Adjust Transaction)*
-
- Close Period
*Allows for closing the fiscal period
(POS > Management > Manage Periods > Close Period)*
-
- Default Restrictions
*Allows setting of various restrictions for a student
(POS > Patrons > Students > Restrictions tab)*
-
- Delete a Menu Grid
*Allows for removal of a menu grid
(POS > Menu Items > Menu Grids > Delete)*
-
- Deposit Slip
*Allows for creating deposit slips
(POS > Administration > Deposit Slip > Add)*
-
- Edit Imported Data
Allows for editing imported data
-
- Eligibility Analysis
*** Only for use by Cybersoft**
-
- Enter Manual Sale
*Allows creation of manual sale entries
(POS > Administration > Record Sales)*
-
- File Based Data Import/Export
*Allows for importing or exporting data files
(POS > Management > UFS Export/Balance Import/FSA Export/Lockbox Import)*
-

-
- Manage Charge Limits
*Allows for setting charge limits
(POS > Patrons > Students > Restriction tab)*

 - Manage Close Period
*Allows access to close period
(POS > Administration > Reconciliation > [Closing Balance] Details)*

 - Manage Command Keys
Allows management of command area on POS serving screen

 - Manage Default School Type Menu Grid
*Allows for setting the default key map by school type
(POS > Menu Items > Default Menu Grids)*

 - Manage Deposit Slip
Allows for viewing of deposit slips

 - Manage Meal Equivalents
*Allows access to Meal Equivalents function
(POS > Menu Items > Meal Equivalents)*

 - Manage Opening Balance
*Allows access to close period
(POS > Administration > Reconciliation > [Opening Balance] Details)*

 - Manage RDA (Recommended Dietary Allowances)
*Allows management of RDA groups
*** Used only at specific districts***

 - Manage Student Menu Item Restrictions
*Allows management of items on the "Restrict Menu Items" list
(POS > Patrons > Students > Restriction tab)*

 - Manage Terminals
Allows for managing terminals

 - Meal Count By Terminal
*Allows access to Meal Count by Terminal report
(POS > POS Reports > Meal Count By Terminal)*
-

- Meal Types
Allows for creating new meal types and changing existing meal type information

- Menu Items
*Allows for creating new menu items and changing existing menu items
(POS > Menu Items > Menu Items)*

- Menu Grid
*Allows for creating and changing menu grids
(POS > Menu Grids)*

- Modify menu item in sale adjustment
Allows for changing the price of a menu item in a previous sale

- No Credit Student List
Allows for generating list of students not allowed credit purchases

- Non-Participating Student List
Allows for generating list of students who do not participate in FRE

- Operate POS
Allows operation of POS terminal

- Payments
*Allows access to the Payments function in the Students and Accounts functions
(POS > Patrons > Accounts/Students)*

- POS Configuration Settings
Allows access to POS configuration settings

- POS Reminder
Allows access to generate Reminder letters

- Post POS Accounts
Allows for posting POS accounts

- Principal Account Lookup
Allows access to principal account information

- Print ID cards
*Allows for printing ID cards with an ID card printing machine
(POS > Patrons > Print ID Cards)*

-
- Quick Payments
Allows access to create Quick Payments

 - Reconciliation
*Allows for reconciling POS sessions
(POS > Administration > Reconciliation)*

 - Reminders
*Allows access to print low balance reminders
(POS > Administration > Reminders)*

 - Remove menu item in sale adjustment
*Allows removal of menu item from a previous sale
(POS > Administration > Reconciliation > Adjust Transaction > Remove)*

 - Reports
Allows access to reports listed on the POS Reports menu in the POS module

 - Return Payment
*Allows access to Refund function in Accounts
(POS > Patrons > Accounts)*

 - Special Roster
*Allows for creating, viewing and changing special rosters
(POS > Administration > Special Roster)*

 - Student Invoice Payment
Allows access to generate student invoice payments

 - Student Invoice Printing
Allows access to print student invoices

 - Student Make Invoice Payment
Allows access to generate student invoice payments

 - Switch Menus on POS Terminal
Allows temporary switching of menus on POS Terminal

 - This User Acts as Manager
Allows access to manager functions

- Till Status
Allows access to Till Status report
- Transaction Adjustments
*Allows for making transaction adjustments required for reconciliation
 (POS > Administration > Reconciliation)*
- View and Edit Manual Sale
Allows for viewing and changing completed manual sale entries
- View Period
*Allows for viewing the fiscal period
 (POS > Management > Manage Periods)*
- View Session
*Allows access to view open POS sessions
 (POS > Administration > View Session)*

Category: Management

- Balance Import
- FSA Export
- Manage Program
- Payments Import
- Program Configuration
- Sodexo Vendor Export

Category: Patrons

- Manage ACH Accounts
*Allows access to manage ACH details for a patron account
(POS > Patrons > Accounts > Manage ACH)*
-

Category: POS Reports

- Activity Report
*Allows access to Activity report
(POS > POS Reports > Activity)*
-
- Billing Summary Report
*Allows access to Billing Summary report
(POS > POS Reports > Billing Summary)*
-
- Cash Collection Report
*Allows access to Cash Collection report
(POS > Business Reports > Cash Collection)*
-
- Claim Details Report
Allows access to Claims Details report
-
- Deposit Slip Report
*Allows access to Deposit Slip report
(POS > Administration > Deposit Slip > View > Print)*
-
- Edit Check Report
*Allows access to Edit Check report
(POS > POS Reports > Edit Check)*
-
- Manual Sale Record Report
*Allows access to POS Closing report
(POS > Administration > Print Close Session)*
-
- Meal and Cash Report
Allows access to Meal and Cash report
-

- Meal Count Report
*Allows access to Meal Count by Terminal report
(POS > POS Reports > Meal Count By Terminal)*

- Meal Count by School Report
*Allows access to Meal Count by Eligibility report
(POS > POS Reports > Meal Count By Eligibility)*

- Meal Participation
*Allows access to the Meal Participation report
(POS > POS Reports > Meal Participation)*

- Menu Item Sales Report
*Allows access to Menu Item Sales report
(POS > Business Reports > Menu Item Sales)*

- No Charge List Report
*Allows access to No Charge List report
(POS > POS Reports > No Charge List)*

- Payment Report
*Allows access to the Payment report
(POS > POS Reports > Payment)*

- Print Daily Reports

- Principal Account History Report
*Allows access to Principal Account History report
(POS > POS Reports > Principal Account History)*

- Reimbursement Claim Report
*Allows access to Reimbursement Claims report
(POS > Management > Reimbursement Claims)*

- Returned Checks Report
*Allows access to Returned Checks report
(POS > Business Reports > Returned Checks)*

- Revenue Report
*Allows access to Revenue report
(POS > Business Reports > Revenue)*

-
- School Balance Report
*Allows access to School Account Balance report
(POS > Business Reports > School Account Balance)*

 - Student Balance Report
*Allows access to Student Balance report
(POS > POS Reports > Student Balance)*

 - Student Meal Report
Allows access to Student Meal report

 - Student Participation Report
*Allows access to Student Participation report
(POS > Business Reports > Student Participation)*

 - Student Roster Report
*Allows access to the Student Roster report
(POS > POS Reports > Student Roster)*

 - Session Transaction Report
*Allows access to Session Transactions report
(POS > POS Reports > Session Transactions)
(POS > Administration > Reconciliation > Session Report)*

 - Tax Report
Allows access to generate and print Tax report

 - Tiered Pricing Report
Allows access to generate and print Tiered Pricing report

 - Transactions History Report
*Allows access to the Transaction History report
(POS > POS Reports > Transaction History)*

Category: Student Billing



Sales Invoice

Allows access to create sales invoices



NACHA Configuration (National Automated Clearinghouse Association)

Allows access to update student checking account information

Appendix D: System Permissions

Module: System

The System module includes three (3) categories of options which are described in the table below.

Table A.5: System Options

Category: Configuration	
<input checked="" type="checkbox"/>	View Licensing Information <i>Allows access to view site licensing for PrimeroEdge modules</i>
<input checked="" type="checkbox"/>	Assign Site Licenses <i>Allows access to assign site license for PrimeroEdge modules</i>
<input checked="" type="checkbox"/>	Edit License Key <i>Allows for changing the PrimeroEdge license key</i>
Category: Management	
<input checked="" type="checkbox"/>	Add Custom Reports <i>Allows access to create custom reports</i>
<input checked="" type="checkbox"/>	Assign DE Jobs for DE Tasks <i>Allows access to assigning data entry jobs</i>
<input checked="" type="checkbox"/>	Data Exchange <i>Allows access to create and update data exchange formats</i>
<input checked="" type="checkbox"/>	Data Import Export <i>Allows access to the TOOLS/ IMPORT EXPORT</i>
<input checked="" type="checkbox"/>	Data Import Logs <i>Allows viewing data import logs to verify completion</i>
<input checked="" type="checkbox"/>	Delete Message <i>Allows access to delete PrimeroEdge messages</i>
<input checked="" type="checkbox"/>	Disable Terminal <i>Allows access to disable POS terminal</i>
<input checked="" type="checkbox"/>	Edit Person Details

Allows for saving changes made to person details (including FRE temporary status change)

Enroll Fingerprints

Allows for enrolling student finger prints in those districts that use biometric identification

Manage Attendance Factor

Allows for changing the school attendance factor

Manage BackOffice Settings

Allows for changing BackOffice Settings

Manage Devices

*Allows access to the **Manage Devices** function on the **Devices** menu in the Temperature Tracker module*

Manage Home Room

Allows for creating new Home Rooms and changing existing Home Room information

Manage Navigation

Allows for changing the navigation tool bar in Primero Manager; changes made to navigation are effective district wide

Manage Periods

Allows access to generate and change periods

Manage Users at Same Level

Allows for managing other users with permissions set at the same

Management Mapping

Allows access to Management Mapping function

Merge Patrons

Allows for merging student accounts

Primero Monitor

Allows access to Primero Monitor

<input checked="" type="checkbox"/>	Regions <i>Allows for creating new regions and changing existing region information</i>
<input checked="" type="checkbox"/>	Reimbursement Rates <i>Allows for managing Reimbursement Rates</i>
<input checked="" type="checkbox"/>	Roles <i>Allows for creating new roles and changing existing role functions</i>
<input checked="" type="checkbox"/>	School Types <i>Allows for creating new school/site types and changing existing school/site types</i>
<input checked="" type="checkbox"/>	Schools <i>Allows for creating new schools/sites and changing existing school/site information</i>
<input checked="" type="checkbox"/>	Sif Logs <i>Allows access to SIF logs (student information system)</i>
<input checked="" type="checkbox"/>	Students <i>Allows for managing students, including Particulars and Restrictions</i>
<input checked="" type="checkbox"/>	Staff <i>Allows for creating new staff users and changing existing staff user information</i>
<input checked="" type="checkbox"/>	Staff Types <i>Allows for creating new staff types and changing existing staff type information</i>
<input checked="" type="checkbox"/>	Support Cases <i>Allows access to view support ticket tracking</i>
<input checked="" type="checkbox"/>	Synchronize Terminal <i>Allows access to synchronize POS terminals</i>
<input checked="" type="checkbox"/>	System Configuration Settings <i>Allows for changing system configuration settings</i>
<input checked="" type="checkbox"/>	Terminal Setup Tool <i>Allows access to the Terminal Setup Tool which is used when setting up a terminal for the first time, after transferring the terminal to a new location, or when changing the terminal's school/site</i>

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- Terminals
Allows for configuring terminals

 - User Security
Allows access to the Manage Users and Manage Roles functions on the Sites and Users menu in the System module

 - Users
Allows user to manage users

 - Version Monitor
*Allows access to the **Version Monitor** function on the **System Tools** menu in the System module*

 - View Application From Manage Students
Allows access to display student applications

 - Year Begin
Allows access to the "Year Begin" function (carry over status from last year for a grace period)

 - View Custom Reports
Allows access to display custom reports
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Category: System Tools

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- Edit Error Messages
Allows access to edit error messages

 - Error Messages
Allows access to view error messages

 - Import Pictures
Allows access to import student/staff picture files for inclusion on IDs

 - Logged-In Users
Allows access to view all logged-in users in PrimeroEdge
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