



**BLUEPRINT MENU  
MANAGEMENT SYSTEM®**

# **MENU MANUAL**

## **GETTING STARTED**

**I am new - how do I get started?**

*Refer to Step by Step guide.*

**My password isn't working – how do I log into the system?**

*Refer to Step by Step guide OR call (877) 583-9659 for an immediate password reset.*

**Surveyors are here - what do I do?**

*Refer to Generate Menu Reports quick guide.*

**How do I rename diets and/or meals?**

*Refer to Meal and Diet Restriction Settings Modifications quick guide and BPMMS Setting Modifications Training video.*

**I don't see my diet. How do I find it?**

*Refer to Explanation of BluePrint Diets and Meal and Diet Restriction Settings Modifications quick guide.*

**How do I access the training videos?**

*Refer to the ELearning Site.*

## **CYCLE MENU PLANNING**

**I want more menu template options. How do I add more?**

*Refer to the Menu Template Framework guide to determine which menu templates you want then email [menusolutions@usfoods.com](mailto:menusolutions@usfoods.com) with requested templates.*

**How do I copy a menu template?**

*Refer to the Menu Changes quick guide and BPMMS Core Menu Changes Training video.*

**How do I add my current menu to the system?**

*Refer to the Create a Custom Menus quick guide.*

**How do I make a change to a menu template?**

*Refer to the Menu Changes quick guide and BPMMS Core Menu Changes Training video.*

**How do I create a combination diet?**

*Refer to the Create Combination Diets quick guide.*

**How do I change the same recipe on my menu for all days? (example: Wheat dinner roll to White dinner roll)**

*Refer to the Menu Item Remove Replace quick guide.*

**How do I add a recipe to the menu?**

*Refer to the Menu Changes quick guide, Menu Changes at Edit Menu Screen quick guide, BPMMS Core Menu Changes Training video and BPMMS Menu Changes Edit Menus Training video.*

## **CYCLE MENU PLANNING**

### **How do I adjust the placement of recipes on my menu?**

*Refer to the Menu Changes quick guide, Menu Changes at Edit Menu Screen quick guide, BPMMS Core Menu Changes Training video and BPMMS Menu Changes Edit Menus Training video.*

### **How do I change a recipe on my menu?**

*Refer to the Menu Changes quick guide, Menu Changes at Edit Menu Screen quick guide, BPMMS Core Menu Changes Training video and BPMMS Menu Changes Edit Menus Training video.*

### **How do I print my menu reports?**

*Refer to Generate Menu Reports quick guide and BPMMS Core Menu Reports Training video.*

### **How do I get a list of all my recipes?**

*Refer to Generate Menu Reports quick guide and BPMMS Core Menu Reports Training video.*

### **How can I limit the number of recipes that print in my recipe book?**

*Refer to Generate Menu Reports quick guide and BPMMS Core Menu Reports Training video.*

### **How do I run my diet spreadsheets?**

*Refer to Generate Menu Reports quick guide and BPMMS Core Menu Reports Training video.*

### **Can I print my menu without alternates?**

*Refer to Generate Menu Reports quick guide and BPMMS Core Menu Reports Training video.*

### **How do I print my menu with dates?**

*Refer to Generate Menu Reports quick guide and BPMMS Core Menu Reports Training video.*

### **How do I change the order of my menu items?**

*Refer to the Menu Changes at Edit Menu Screen quick guide, Review Spread Lines quick guide and BPMMS Menu Changes Edit Menus Training video.*

### **Why am I receiving the error message “items missing replacements: when making a menu change?”**

*Refer to Missing Replacements at Week at a Glance Screen quick guide.*

### **How do I spread the menu?**

*Refer to Spread Menu to Therapeutic Diets quick guide.*

### **How do I make changes to recipes on the therapeutic diets?**

*Refer to the Menu Changes at Edit Menu Screen quick guide, Edit Therapeutic Diet Replacements and Update Menu quick guide and BPMMS Menu Changes Edit Menus Training video.*

## **RECIPES**

### **How do I find the recipe I am looking for?**

*Refer to the Standard Naming Conventions quick guide and BPMMS Recipe Overview Training video.*

### **My recipe search does not have any search results. What do I do?**

*Refer to the Standard Naming Conventions quick guide and BPMMS Recipe Overview Training video.*

### **How do I quantify my recipes?**

*Refer to Generate Menu Reports quick guide and BPMMS Core Menu Reports Training video.*

### **How do I print a list of recipes from the system by category?**

*Refer to the Advanced Recipe Search quick guide.*

## **PRODUCTION**

### **How do I run production sheets?**

*Refer to the Diet Census Forecast Tally & Print Production Reports quick guide and BPMMS Production Video training.*

### **How do I run temperature logs?**

*Refer to the Diet Census Forecast Tally & Print Production Reports quick guide and BPMMS Production Video training.*

### **How do I know how much of each menu item to make?**

*Refer to the Diet Census Forecast Tally & Print Production Reports quick guide and BPMMS Production Video training.*

### **My production reports are not generating. What do I do?**

*Refer to the Diet Census Forecast Tally & Print Production Reports quick guide and BPMMS Production Video training.*

**GENERAL DIETS**

**Regular/No Added Salt (NAS):** Follows standard meal pattern: 3 fruits, 3 vegetables, 6 grains, 7 ounces protein, 3 milk servings per day. No Added Salt keeps to less than 4,000mg Sodium per day.

**Finger Foods:** Based on Regular/No Added Salt diet – modifies the menu to provide foods in a form that can be easily manipulated by hand.

**Small Portion:** Based on Regular/No Added Salt diet – smaller portion of entrée, starches and dessert provided.

**High Calorie/High Protein:** Based on Regular/No Added Salt diet – larger portion of entrée and starch provided at all meals.

**No Concentrated Sweets (NCS):** Based on Regular/No Added Salt diet – modifies the menu to reduce total sugar intake. NCS is not a calorie controlled or consistent carbohydrate meal plan. Diet desserts, sugar-free condiments, skim milk.

**Low Concentrated Sweets (LCS):** Based on Regular/No Added Salt diet – modifies the menu to reduce total sugar intake. NCS is not a calorie controlled or consistent carbohydrate meal plan. ½ portion of Regular desserts & sugar-free condiments.

**Consistent Carbohydrate:** Based on Regular/No Added Salt diet – modifies the menu to meet specified carbohydrate servings at each meal within approximate calorie ranges and uses modified portion of desserts & sugar-free condiments.

- Consistent Carbohydrate 3(CCD3)
- Consistent Carbohydrate 4(CCD4)
- Consistent Carbohydrate 5(CCD5)

**TEXTURE-MODIFIED DIETS**

**IDDSI Level 3: Liquidized:** Based on Regular/No Added Salt diet – consists of foods that are smooth without lumps, cannot be molded on a plate, require no oral processing or chewing, and can be swallowed directly.

**IDDSI Level 4: Pureed Food:** Based on Regular/No Added Salt diet – consists of foods that are smooth and lump-free, not firm or sticky, require to chewing or bolus formation, fall off spoon as intact spoonful, hold shape on plate, and liquid must not separate from solid and foods.

**IDDSI Level 5: Minced and Moist Food:** Based on Regular/No Added Salt diet – consists of foods that are minced, soft, and moist and can be scooped and shaped with lump size 4mm by 4mm. Foods require minimal chewing and easily mashed.

**IDDSI Level 6: Soft, Bite Sized Food:** Based on Regular/No Added Salt diet – consists of foods that are soft, tender, and moist with no separate thin liquids. Particle size 15mm by 15mm and chewing is required before swallowing.

**Dysphagia Level 1: Pureed:** Based on Regular/No Added Salt diet – consists of foods that are pureed, homogenous, and cohesive.

**Dysphagia Level 2: Mechanically Altered:** Based on Regular/No Added Salt diet - consists of foods that are moist, soft- textured, and easily formed into a bolus. Some foods, such as breads, will be pureed. Meats are often ground.

**Dysphagia Level 3: Advanced:** Based on Regular/No Added Salt diet - consists of foods that are nearly regular textures with the exception of very hard, sticky, or crunchy foods. Some items may be ground or pureed if necessary.

**Soft:** Based on Regular/No Added Salt diet – modifies the menu to modify hard to chew foods. \*This diet is not for individuals with compromised swallowing capabilities. See IDDSI diets.

## HEART HEALTHY DIETS

**Low Sodium:** Based on Regular/No Added Salt diet – modifies the menu to make lower sodium substitutions. Limits processed foods & baked goods.

**Cardiac:** Based on Regular/No Added Salt diet – modifies the menu to make lower sodium, fat and cholesterol substitutions in order to provide an overall “heart-healthy” diet.

## RENAL DIETS

**Renal:** Based on Regular/No Added Salt diet – modifies the menu to reduce sodium, potassium, and phosphorous intake while also restricting protein intake to approximately 60 grams per day.

**Liberal Renal:** Based on Regular/No Added Salt diet – modifies the menu to reduce sodium, potassium, and phosphorous intake while also restricting protein intake to approximately 80 grams per day.

## GASTROINTESTINAL DIETS

**Clear Liquid:** Consists of foods that are transparent and liquid at body temperature. Juice, gelatin, ice water, popsicles, ice chips, sweetened tea, coffee, soda pop.

**Full Liquid:** Consists of all clear liquids plus other liquids and semi-liquids that include dairy and minimal amounts of residue.

**Fiber Restricted:** Based on Regular/No Added Salt diet – modifies the menu to make lower fiber substitutions in order to meet the 13 gram per day fiber restriction.

**Gluten Restricted:** Based on Regular/No Added Salt diet – modifies the menu to make lower gluten containing substitutions. \*Products to be used for recipes on this diet should be reviewed for gluten content.

**Fat Restricted:** Based on Regular/No Added Salt diet – modifies the menu to make lower fat and cholesterol substitutions in order to limit fat served daily to 25-35%. Low fat, low cholesterol eggs at breakfast.

## VEGETARIAN DIETS

**Lacto-Ovo Vegetarian:** Based on Regular/No Added Salt diet - includes fruits, grains, nuts, seeds, vegetables, milk and other dairy products, and eggs but avoids meat products; beef, fish, veal, lamb, pork, and poultry.

**Pesco Vegetarian:** Based on Regular/No Added Salt diet - includes fruits, grains, nuts, seeds, vegetables, milk and other dairy products, eggs and fish but avoids meat products; beef, veal, lamb, pork, and poultry.

## Menu Template Framework

| Menu Template                          | Cycle Length (weeks) | Meals   | Snacks | Number Entrée Choices  | Number Side Choices | Nutrition Guidelines                        |        |           |        |                                       | Special Considerations   |
|--|----------------------|---------|--------|--|---------------------|---|--------|-----------|--------|---------------------------------------|--|
|  |                      |         |        |  |                     | Number of Servings for Each Food Group      |        |           |        |                                       |  |
|  |                      |         |        |  |                     | Protein<br>(Breakfast,<br>Lunch,<br>Dinner) | Grains | Vegetable | Fruit  | Dairy                                 |  |
| <b>Care Level Menu Templates</b>       |                      |         |        |  |                     |   |        |           |        |                                       |  |
| Independent Living                     | 5                    | B, L, D | HS     | 2  | 2                   | 7 oz<br>(1, 3, 3 oz)                        | 6      | 3         | 3      | 3                                     | Based on care level and associated Price Per Resident Day (PRD). Fall/Winter & Spring/Summer.  |
| Assisted Living                        | 4                    | B, L, D | HS     | 2  | 1                   | 7 oz<br>(1, 3, 3 oz)                        | 6      | 3         | 3      | 3                                     | Based on care level and associated Price Per Resident Day (PRD). Fall/Winter & Spring/Summer.  |
| Skilled Nursing                        | 4                    | B, L, D | HS     | 2  | 1                   | 7 oz<br>(1, 3, 3 oz)                        | 6      | 3         | 3      | 3                                     | Based on care level and associated Price Per Resident Day (PRD). Fall/Winter & Spring/Summer.  |
| Memory Care                            | 4                    | B, L, D | HS     | 1  | 1                   | 7 oz<br>(1, 3, 3 oz)                        | 6      | 3         | 3      | 3                                     | Based on care level and associated Price Per Resident Day (PRD). Fall/Winter & Spring/Summer.  |
| <b>Regional Menu Templates</b>         |                      |         |        |  |                     |   |        |           |        |                                       |  |
| Premium Full Select                    | 5                    | B, L, D | HS     | 2  | 2                   | 6 oz<br>(1, 3, 2 oz)                        | 6      | 3         | 3      | 3                                     | Regionalized menu items. Fall/Winter & Spring/Summer.  |
| Entrée Select<br>(Northern & Southern) | 4                    | B, L, D | HS     | 2  | 1                   | 6 oz<br>(1, 3, 2 oz)                        | 6      | 3         | 3      | 3                                     | Regionalized menu items. Fall/Winter & Spring/Summer.  |
| Non-Select<br>(Northern & Southern)    | 4                    | B, L, D | HS     | 1  | 1                   | 6 oz<br>(1, 3, 2 oz)                        | 6      | 3         | 3      | 3                                     | Regionalized menu items. Fall/Winter & Spring/Summer.  |
| <b>Special Menu Templates</b>          |                      |         |        |  |                     |   |        |           |        |                                       |  |
| Acute Care                             | 1                    | B, L, D | HS     | 2  | 2                   | 6 oz<br>(1, 3, 2 oz)                        | 6      | 4         | 2      | 3                                     | Created for small hospitals.   |
| Always Available                       | 1                    | B, L, D | -      | Each meal contains a static list of 20-30 basic recipes to be offered daily. |                     |   |        |           |        | Recommended for use with Tray Ticket. |  |
| Brunch                                 | 4<br>(1 meal/week)   | L       | -      | 3  | 3                   | 2-3 oz                                      | Varies | Varies    | Varies | Varies                                | Combination of upscale breakfast & lunch options. 3 entrée choices and related sides. Rotation of sweet bread and choice of cereal, fresh fruit & beverages. |

| Menu Template                 | Cycle Length (weeks)   | Meals                   | Snacks | Number Entrée Choices | Number Side Choices | Nutrition Guidelines                        |            |            |            |        | Special Considerations   |
|-------------------------------|------------------------|-------------------------|--------|-----------------------|---------------------|---|------------|------------|------------|--------|--|
|                               |                        |                         |        |                       |                     | Number of Servings for Each Food Group      |            |            |            |        |  |
|                               |                        |                         |        |                       |                     | Protein<br>(Breakfast,<br>Lunch,<br>Dinner) | Grains     | Vegetable  | Fruit      | Dairy  |  |
| <b>Special Menu Templates</b> |                        |                         |        |                       |                     |   |            |            |            |        |  |
| Comfort Food                  | 4                      | B, L, D,<br>Soup of Day | HS     | 2                     | 1                   | 8 oz<br>(2, 3, 3 oz)                        | 6-8        | 3          | 3          | 3      | Large portions. Includes heavy comfort foods such as pizza, hamburgers, & stews.   |
| Daily Fare                    | 5                      | B, L, D                 | HS     | 3                     | 1                   | 3 oz  | 1-2        | 1-2        | 0-1        | 1      | Upscale rotating menu. Includes standard breakfast and the same items at lunch & dinner each day. Fish entrée, soup & salad included daily.          |
| Disaster                      | 1                      | B, L, D                 | HS     | 1                     | 1                   | 6 oz<br>(1, 3, 2 oz)                        | 6          | 3          | 3          | 3      | Only contains ingredients to be used in emergency situations without heat, water, or refrigeration.  |
| Gourmet                       | 4                      | B, L, D                 | HS     | 2                     | 1                   | 6 oz<br>(2, 3-4,<br>2-3 oz)                 | 6-7        | 3-4        | 3          | 3      | Upscale recipes and menu pairings with soup & salad at lunch and dinner. Primarily scratch recipes and fresh vegetables. Summer & Winter menu cycle. |
| Heart Healthy                 | 2                      | B, L, D                 | HS     | 1                     | 1                   | 6 oz<br>(1, 3, 2 oz)                        | 6          | 3          | 3          | 2      | Low cholesterol, total fat, and sodium. Promotes heart-healthy fats, high fiber grains & vegetables.   |
| Holiday Menus                 | -                      | L                       | -      | 1-2                   | 1                   | 2-3 oz                                      | 2-3        | 2-3        | 0-1        | 1      | Includes a single meal for Christmas, Cinco de Mayo, Easter, Independence Day, Memorial Day, New Year's Day, St. Patrick's Day, Thanksgiving.        |
| National Food Holiday Menus   | -                      | L                       | -      | 1-2                   | 1                   | 2-3 oz                                      | Varies     | Varies     | Varies     | Varies | Includes a single meal for National Avocado Day, National Taco Day, National Cheese Day, and more!   |
| Meals on Wheels               | 4<br>(5 days/<br>week) | B, L                    | -      | 1                     | 1                   | 3 oz per meal                               | 2 per meal | 2 per meal | 3 per meal | 1      | Dished easy to transport and re-heat. Each meal provides a minimum of 1/3 of the Dietary Reference Intake.   |
| Mediterranean                 | 4                      | B, L, D                 | HS     | 1                     | 1                   | 6 oz<br>(1, 3, 2 oz)                        | 3          | 3          | 3-4        | 3      | Emphasizes fish, olive oil, nuts, whole grains, fruits, berries & vegetables. Limits red meat, pork, heavy desserts & processed meats.               |

| Menu Template                         | Cycle Length (weeks) | Meals   | Snacks     | Number Entrée Choices          | Number Side Choices | Nutrition Guidelines                   |        |           |        |                                  | Special Considerations  |
|---------------------------------------|----------------------|---------|------------|--------------------------------|---------------------|--|--------|-----------|--------|----------------------------------|---|
|                                       |                      |         |            |                                |                     | Number of Servings for Each Food Group |        |           |        |                                  |   |
|                                       |                      |         |            |                                |                     | Protein<br>(Breakfast, Lunch, Dinner)  | Grains | Vegetable | Fruit  | Dairy                            |   |
| <b>Special Menu Templates</b>         |                      |         |            |                                |                     |  |        |           |        |                                  |   |
| No Pork No Shellfish                  | 4                    | B, L, D | HS         | 1                              | 1                   | 6 oz<br>(1, 3, 2 oz)                   | 3      | 3         | 3      | 3                                | Ham, bacon, sausage, & seafood are excluded. Processed meats made from turkey are included.   |
| Retail                                | 1                    | B, L    | -          | 4 rotating & 5 static at Lunch | 4-7                 | Varies                                 | Varies | Varies    | Varies | Varies                           | Includes recipes to be served in a retail cafeteria. Standard breakfast including rotating entrée. Multiple lunch entrée and related sides.   |
| Sack Lunch                            | 1                    | L       | -          | 1                              | 1                   | 2-3 oz                                 | 2-3    | 1         | 0-1    | 1                                | Cold meal able to be provided "to-go" with refrigeration.   |
| Snack Menu                            | 4                    | -       | AM, PM, HS | -                              | -                   | -                                      | 1      | -         | -      | -                                | Includes 1 grain snack & beverage for each snack time.  |
| <b>Liquid Diet Menu Templates</b>     |                      |         |            |                                |                     |  |        |           |        |                                  |   |
| Clear Liquid                          | 1                    | B, L, D | AM, PM, HS | -                              | -                   | -                                      | -      | -         | -      | -                                | Includes: broth, gelatin, popsicles, Italian ice, fruit juice, fruit punch, coffee, tea, lemonade, & water.   |
| Full Liquid                           | 1                    | B, L, D | AM, PM, HS | -                              | -                   | -                                      | -      | -         | -      | -                                | Includes: hot cereal, yogurt, pudding, soup, ice cream, gelatin, Italian ice, popsicles, sherbet, milkshakes, milk, fruit & vegetable juice, coffee, tea & water.                                       |
| <b>Vegetarian Diet Menu Templates</b> |                      |         |            |                                |                     |  |        |           |        |                                  |   |
| Lacto-Ovo                             | 2                    | B, L, D | HS         | 1                              | 1                   | 6 oz<br>(1, 3, 2 oz)                   | 6      | 3         | 3      | 3                                | Exclude fish, beef, pork, poultry, & meat broths.   |
| Pescatarian                           | 4                    | B, L, D | HS         | 1                              | 1                   | 6 oz<br>(1, 3, 2 oz)                   | 6      | 3         | 3      | 3                                | Exclude beef, pork, poultry, & meat broths.   |
| Vegan                                 | 4                    | B, L, D | HS         | 1                              | 1                   | 6 oz<br>(1, 3, 2 oz)                   | 6      | 3         | 3      | 3<br><i>(dairy alternatives)</i> | Excludes milk, butter, egg, cheese, fish, beef, pork, poultry, & meat broths. <b>All products and preparation methods used MUST be reviewed by a local Registered Dietitian to ensure a Vegan menu.</b> |

Menu templates listed are available for use with the BluePrint Menu Management System™ only.

Background: Now that you've signed up for the Blueprint Menu Management System<sup>™</sup>, what's next? Follow these steps to get started.

**Step 1**

**Log In to the Blueprint Menu Management System<sup>™</sup>**

**BluePrint Log In Page:** <https://blueprint.cbord.com/usfoods/> -- bookmark this page!

Using the information provided in your Welcome Email, log in to the Blueprint Menu Management System

*Tip:* You can also access this link through the US Foods ordering site → Our Exclusives → Healthcare Menus and Recipes

**Step 2**

**Reset Your Password**

You will be prompted to change your password upon logging in for the first time.

For security purposes, it is recommended to change your password to something that you will remember and that is secure.

**Step 3**

**Set up Password Recovery Questions**

From the homepage, go to **Preferences**. Click on  **Password Reset**. Click the **Email and Security Questions** button. You will be prompted to type in your password.

Choose 3 security questions and type your answers in the text box. Click **Done**. Click  **Home** to return to the Home Page

**Step 4**

**Copy a Menu Template**

Refer to the **Basic Menu Changes Quick Guide** or watch **BPMMS Core Menu Training Video** for detailed instructions.

*HINT:* US Foods Standard Menu Templates have been published to your site. If you are interested in any other 'Special' menu templates, reach out to your Menu Solutions Specialist.

**Step 5**

**Customize Menu Choices**

Refer to the **Basic Menu Changes Quick Guide** or watch **BPMMS Core Menu Training Video** for detailed instructions on how to customize your menu.

**Step 6**

**Run Reports**

Watch Refer to the **Generate Menu Reports Quick Guide** or watch **BPMMS Core Menu Reports Training Video** for additional information on running Menu Reports.

## Standard Naming Conventions

Background: To help with searching for ingredients and recipes in the system, review the standard BluePrint Menu Management System naming conventions below.

### Ingredients:

- General item name/ingredient named from general to specific
  - *Ex. Bacon Raw; Spice Oregano Ground; Lettuce Romaine Head Fresh*
- Form of food abbreviations at the end of name
  - Cnd, Fzn, Fresh, PC
- PC items list the portion size in the name
  - *Ex. Cereal Bran Flakes PC*
- Common name includes the form of food if necessary information for preparation
  - Cnd, Fzn, PC all listed so that it is easy to identify the specific form of the ingredient to be used in the recipe
- Ingredient key name auto generated by the BluePrint System
  - **Hint:** You can search for ingredients and recipes by key name

### Recipes:

- Recipes are named with main ingredient first followed by description (general to specific)
  - *Ex. Chicken Baked; Lasagna Vegetable; Pork Chop Smothered*
  - No commas are used in recipe naming
- All regular recipes are specified with an **(\*) asterisk** in front of the recipe name so that all regular recipes filter to the top of the recipe search list.
- Different indicators are used in recipes:
  - **[ ]** Brackets are used as protein indicators to specify the amount of high biological value protein per serving.
    - Listed after the recipe name
    - [2] 2 oz protein
    - [3] 3 oz protein
  - **[bkfst]** is used for recipes that may appear at breakfast meals
    - Typically provide 1 oz protein per serving
    - Typically smaller portions (2x4 frittata square vs. 3x5 frittata square)
  - **( )** Parentheses are used as indicators to specify the form of food or recipe
    - Listed after the recipe name
    - All lower case letters are used
    - *Ex: Peas Green (fzn); Potatoes Mashed (fresh)*
- **Common Name** and **Formal Name** are the same and neither includes the form of the food
  - Can be modified by the user at the General Info tab of the recipe

## Tips:

- Recipes are typically entered as a yield of 50, unless yield was determined by batch or pan size
- Batch or pan size recipes are rounded to the nearest unit for production
  - This can be modified to fit your facility on the **Production** tab
- Preparation techniques are assigned to indicate sliced, drained, diced, etc. for a specific ingredient
  - Preparation techniques will show up on production reports
- Finger Food recipes are assigned as an additional portion unit & a note is included on the regular recipe
- Pureed recipes refer to the regular recipe as the only ingredient and the recipe instructions will reflect standard pureeing instructions
- Traits are assigned to pureed, ground, vegetarian, low sodium and finger foods recipes
  - Users will be able to search for a specific trait using **More Search Criteria** in the **Search for Items & Recipes** field



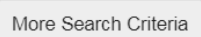
## Common Abbreviations:

- fzn (frozen)
- cnd (canned)
- scr (scratch)
- conv (convenience)
- PC (portion control or individual serving)
- (bkfst) breakfast
- (fresh) fresh
- (mix) mix
- (brst) breast; (8way) 8-way; (th) thigh; (b:bst) boneless breast; (leg) leg
- Pur (pureed)
- Grd (ground)



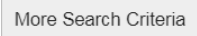
## Advanced Recipe Search

Background: Use search criteria in the BluePrint System recipe database to narrow search results and print a list of recipes.

### Narrow Recipe Search Results:

1. Navigate to **Ingredient and Recipe Maintenance** from the home screen and click on  **Ingredient and Recipe Search**.
2. Search for desired  recipes using the **Search for Items and Recipes** window.  
**Hint:** If there is already information in the **Search for Items and Recipes** window - leftover from a previous search - click **Clear** or **Clear All** to start a new search.  
**Hint:** At **Item Type**, select **Recipe**.
3. Click the  button in the **Search for Items and Recipes** window.
4. In the **Name (Additional)** window, select a field to search by on the left side by clicking on the name. For example, click on **Menu Planning Groups** to view recipes by category. In the box on the right side, click on the recipe Menu Planning Group(s) you wish to view. For Example, Dessert Cake. Click **Add**. Click **Done**.  
**Hint:** Hold down your Ctrl button on your keyboard & right click on menu planning groups to select multiple categories.
5. Review recipe results and click the checkbox next to the recipe(s) you wish to select.


### Print a List of Recipes:

1. Navigate to **Reports** from the home screen and click on  **Item and Recipe Reports**.
2. Click on  **Recipe Reports**.
3. From the **Available Reports** list, select **Recipe Nutrition List** by clicking the checkbox on the left. Click **Next**.
4. Use the steps listed above for  in the **Search for Items** window.
5. Review recipe results and click the checkbox next to the recipe(s) you wish to select. Click **Print Selected**.  
**Hint:** Click **Print All** to generate a list of all recipes listed.  
**Important:** After clicking 'Print', the report will come up in a pop-up window. If a report does not appear, make sure all pop-up blockers on your internet browser are disabled.

## Menu Changes




Background: Use the steps below to copy a US Foods template menu and make basic menu changes including remove/replace/add recipes and swap meals.

### Copy Template Menu:







1. From the homepage, go to  [Manage Menu Cycles](#). Click the radio button next to the template menu you want to customize. Click [Copy Cycle](#) button. First, click on the Regular/No Added Salt Diet and use the Select button to move the diet over to the box on the right. Continue this step for all diets included on the menu. Select which Meals 'All Meals' to the right. Click [Copy](#).
  - ✓ Under #2, update the name of your menu.
  - ✓ Under #5, choose your cycle menu dates.
  - ✓ Under #7, estimated PRD range should be used as a reference point only - update as needed. Click [Done](#).

**Important:** Therapeutic diets are assigned to your cycle menu when the menu is copied. DO NOT assign thickened liquids, tube feeding or NPO diets.


### Replace a Recipe on the Menu

1. From the homepage, navigate to [Cycle Menu Planning](#) and click on  [Week at a Glance](#).  
**Hint:** Make sure the correct Menu Cycle is chosen. If not, navigate to [Switch Cycle](#).
2. Click directly on the recipe to be changed. Make sure the box *Spread changes to other diets* is checked. Then click [Replace](#).
3. Search for the recipe to be used as a replacement. Click the radio button next to correct recipe. Click [Select Item as Replacement](#) then click [Replace](#).  
**Hint:** Make sure to select  recipes to put on the menu, not  ingredients.


### Add a Recipe to the Menu

1. Navigate to [Cycle Menu Planning](#) and click on  [Week at a Glance](#).
2. Click [Add](#) button. Select Cycle Days and Meals to add the desired recipe. Make sure the box *Spread changes to other diets* is unchecked. Click [Next](#).
3. Search for the recipe to be added. Click [Go](#).  
**Hint:** Make sure to select  recipes to put on the menu, not  ingredients.
4. Check the box next to the recipe to be added. Click [Add Checked Items](#). Then click [Done](#).
5. Click on the  [Pencil Icon](#) in the top right corner of the meal the recipe was added to.
6. Use the   [Arrows](#) to move the recipe up or down in the listed menu items.
7. Update the spread line for the new item. The spread line will determine the order the recipe will appear on the menu.  
**Important:** DO NOT change the spread lines for other recipes.
8. Click on the  checkbox next to the added recipe. Click [Spread Checked](#). Make sure all diet restrictions in use are under *Spread To* on the right. Use the [Select](#) and [Remove](#) buttons to adjust. Click [Next](#). The system will list any missing recipe replacements – these must be coded before proceeding. Click [Next](#).  
Click [Spread](#).

### Remove a Recipe from the Menu


1. Navigate to **Cycle Menu Planning** and click on  **Week at a Glance**.
2. Click directly on a recipe. Make sure the box ***Spread changes to other diets*** is checked.
3. Click **Remove**.

### Swap Cycle Days






1. Navigate to **Cycle Menu Planning** and click on  **Week at a Glance**.
2. Click on the **Swap** button.
3. Select the Cycle Day(s).
4. Select the desired Meal.
5. Select the desired Target Cycle Day(s).
6. Select the desired Target Meal.
7. Click **Swap**.


**Generating Menu Reports for Printing**

Background: There are many reports available to evaluate your cycle menu and make informed decisions during the menu planning process. Use the chart below to help determine which report(s) you need to print and how to print in the BluePrint System.




1. For any of the reports below start by navigating to **Reports** and select  **Menu Reports**.

**Hint:** Follow the prompts for all reports and be mindful of formatting selections. Be sure to select all weeks within your cycle menu when running your menu reports. Menu Reports generate in a PDF format and can be saved to your computer. Reports with a \* should be run during a State Inspection.

| I need to...  | Report   | How to Generate  | Notes/Tips   |
|---|--|--|--|
| Print my Week at a Glance/Menu Calendar   | <b>Week at a Glance*</b>   | Navigate to <b>At A Glance/Selective Menu Reports</b><br>Click on  <b>Week at a Glance Reports</b><br>Choose your menu from <b>Menu Cycle</b> dropdown  | -Recommend 'Legal Size, Landscape' format<br>-Ability to remove dates from report by choosing 'No' for <b>Print Dates on Report</b> option<br>-Ability to remove alternates from report by selecting meals and choosing 'Omit alternates from these Meals' |
| Print my Diet Extensions  | <b>Diet Spread Report*</b>   | Click on  <b>Diet Spread Reports</b> : Run report for your desired diet restrictions (up to 14 per report).<br>Choose your menu from <b>Menu Cycle</b> dropdown   | -Recommend 'Diet SpreadSheet X-format'<br>-'x' indicates diet is to be served the same recipe and portion as the Regular/NAS diet  |
| Print a Nutrition Analysis of my menu   | <b>Average Cycle Nutrition Analysis*</b><br>Or<br><b>Detailed Menu Cycle Nutrition Analysis*</b> | Click on  <b>Nutrition Analysis Reports</b><br>Choose your menu from <b>Menu Cycle</b> dropdown<br>Run report for desired diet restrictions   | -Depending on the size of your menu, the system may limit the number of therapeutic diets run at a single time. You may need to generate this report multiple times to capture all therapeutic diets.  |
| Print all recipes on my menu<br>or<br>Quantify my recipes to different portion yields | <b>Recipe Book</b>   | Click on  <b>Recipe Book</b><br>Run report for all days and meals of your cycle menu.<br>The default portion scaling will default be 10, 25, 50, 75, 100.<br>Select sort by 'Menu Planning Group- default portions only'. | -Adjust the portion scaling quantities to fit your needs<br>-Ability to also sort recipes by Cycle Day – default portions only   |
| Print a Cost Analysis of my menu  | <b>Average Daily Cost Reports</b>  | Click on  <b>Average Daily Cost Reports</b>   | -Average Daily Cost Report shows the average cost of each meal on your menu  |

| I need to...  | Report                       | How to Generate  | Notes/Tips   |
|---|------------------------------|--|--|
| Print Selective Menus<br><i>(I don't have Tray Card or Tray Ticket)</i> | <b>Selective Menu Report</b> | Run the <b>Average Daily Cost By Diet</b> and the <b>Average Daily Cost Detail By Diet</b> for the selected diet.<br><br>Navigate to <b>At A Glance/Selective Menu Reports</b><br>Click on  <b>Selective Menu Report.</b><br>From Menu Cycle dropdown, choose your menu<br>Choose desired diet restriction and meals (max of 3) | -Average Daily Cost Detail Report separates the cost by menu item as well as meal<br><br>-Allows up to three meals for one diet displayed in a menu-style format<br>-Recommended for "Employee Meal Tickets" if needed |

### What other Menu Report Options do I have?


| Report                          | How to Generate   | Notes/Tips   |
|---------------------------------|---|--|
| <b>Meal at a Glance Report</b>  | Navigate to <b>At A Glance/Selective Menu Reports</b><br>Click on  <b>Meal at a Glance Report.</b><br>From Menu Cycle dropdown, choose your menu<br>Choose desired diet restriction and meals to be displayed          | <b>-Daily Meal at a Glance</b> – displays menu items for one day and meal for selected diet restriction, one meal per page<br><b>-Weekly Meal at a Glance</b> - meals in a calendar format for a week, one meal per page |
| <b>Day at a Glance Report</b>   | Navigate to <b>At A Glance/Selective Menu Reports</b><br>Click on  <b>Day at a Glance Report.</b><br>Choose your menu from <b>Menu Cycle</b> dropdown<br>Choose desired diet restriction and meals to be displayed     | -Report will display menu items for one day and one diet restriction   |
| <b>Month at a Glance Report</b> | Navigate to <b>At A Glance/Selective Menu Reports</b><br>Click on  <b>Month at a Glance Report.</b><br>Choose your menu from <b>Menu Cycle</b> dropdown<br>Choose desired diet restriction and meals to be displayed | <b>Month At A Glance Reports</b> - meals in a calendar format for the month you select   |

## Meal and Diet Restriction Settings Modifications



Background: These steps can be utilized to rename, add, or hide Meals and Nourishments in the BluePrint System. These steps can also be utilized to rename, add, or hide Diet Restrictions.

From the homepage, navigate to **Data Setup** and select  **Settings**.

### Meal Settings

1. Navigate to **Service Settings** and select  **Meals**.
2. **To Rename a Meal** - Click directly on a meal. Fill in the **Name** box and **Short Name** box. Click **Done**.
3. **To Hide a Meal**– Navigate to the right side of the screen under **Hide This Meal**. Click on the **Check Box** to hide that meal type.  
**Hint:** Hide a meal type if you do not want that meal to be visible on list and reports.
4. **To Add a Meal**– Click **Add**. Fill in the **Name** box and **Short Name** box. Click **Done**. Specify the **Meal Type**.  
**Hint:** Main Meals are commonly selected from the drop down for Breakfast, Lunch, and Dinner. Nourishments are commonly selected from the drop down for Snacks.
5. **To Delete a Meal**– Click on the **Check Box** to the left of the Meal Name. Click **Delete Checked**.  
**Hint:** You can only delete meals that you have added. Meals already set up by US Foods cannot be deleted.

### Diet Restriction Settings




1. Navigate to **Clinical Settings** then  **Diet Settings** and select  **Diet Restrictions**.
2. **To Change the Name of a Diet Restriction** – Under **‘Description’** click directly on the name of a diet restriction. Edit the name as needed. Update the **Short (Abbreviated) Name** in the **‘Code’** field. Click **Done**.
3. **To Hide a Diet Restriction** – Navigate to the right side of the screen under **Hide This Diet Restriction**. Click on the **Check Box** to hide that diet restriction.  
**Hint:** Hide a diet restriction if you do not want that diet to be visible on lists and reports.
4. **To Add a Diet Restriction** – Click **Add**. Fill in the **Name** box under the ‘Description’ Field and **Short Name** under the ‘Code’ field. Under consistency, choose ‘Diet Order’. Click **Done**.
5. **To Delete a Diet Restriction** – Click on the **Delete button** in the column furthest to the right.  
**Hint:** You can only delete diet restrictions that you have added. Diets already set up by US Foods cannot be delete

## Menu Changes at Edit Menu Screen

Background: All BluePrint standard menu templates have already been spread to all BluePrint standard therapeutic diets. The Menu Solutions Team recommends making all menu changes at the Week at a Glance screen. However, modifying placement, spread lines, relationships, popularity index of items should be done at the Edit Menus screen.






### Modify Placement of Recipe on Menu

Example: If you have added an item at the Week at a Glance screen, it will default to the bottom of the menu. Follow these steps to update the spread line and modify the placement of items on the menu.

1. From the homepage, navigate to **Cycle Menu Planning** and click on  **Edit Menus**.  
**Hint:** Make sure the correct Menu Cycle is chosen. If not, navigate to **Switch Cycle**.
2. Choose the **Day** and **Meal** you want to add a recipe to from each dropdown.
3. Click the  checkbox next to the item to be moved.
4. Use the   up and down arrows to place the item where you prefer.
5. Update the spread line number so that it is in numerical order. The spread line will determine the order the recipe will appear on the menu.
6. Make sure the checkbox is still checked next to the item that was adjusted. Click **Spread Checked**. Make sure all diet restrictions in use are under **Spread To** on the right. Use the **Select>** and **<Remove** buttons to adjust. Click **Next**. The system will list any missing recipe replacements – these must be coded before proceeding. Click **Next**. Click **Spread**.


### Add a Recipe to the Menu

Example: If you want to add a recipe to a particular day and meal you can do so at the Edit Menus screen. For preferred placement on the menu and other reports follow these steps to add the recipe correctly.

1. Navigate to **Cycle Menu Planning** and click on  **Edit Menus**.
2. Choose the **Day** and **Meal** you want to add a recipe to from each dropdown.
3. Click **Add Items** and search for the recipe to be added. Click **Go**.  
**Hint:** Make sure to select  recipes to put on the menu, not  ingredients.
4. Check the box next to the recipe to be added. Click **Add Checked Items**. Then click **Done**.
5. Update the spread line for the new item. The spread line will determine the order the recipe will appear on the menu.  
**Important:** DO NOT change the spread lines for other recipes.  
**Hint:** Use the  and  Up and Down arrows to place the menu item in the correct order.
6. Click on the checkbox next to the added recipe. Click **Spread Checked**. Make sure all diet restrictions in use are under **Spread To** on the right. Use the **Select>** and **<Remove** buttons to adjust. Click **Next**. The system will list any missing recipe replacements – these must be coded before proceeding. Click **Next**. Click **Spread**.





### Delete a Recipe from the Menu

*Example: If you want to delete a menu item and all of its spreads on a particular day and meal.*

1. Navigate to **Cycle Menu Planning** and click on  **Edit Menus**.
2. Navigate to the correct **Day** and **Meal** you want to delete a recipe from by using the drop downs.
3. Check the  checkbox next to the recipe to be deleted. Click **Delete by Spread Line**. Then click **Done**.




### Add Alternate/Related Recipe to Menu

*Example: If you want to add an alternative to a main menu item.*

1. Navigate to **Cycle Menu Planning** and click on  **Edit Menus**.
2. Choose the **Day** and **Meal** you want to add a recipe to from each dropdown.
3. Click **Add Items** and search for the recipe to be added. Click **Go**.  
 Hint: Make sure to select  recipes to put on the menu, not  ingredients.
4. Check the box next to the recipe to be added. Click **Add Checked Items**. Then click **Done**.
5. Update the spread line for the new item. The spread line will determine the order the recipe will appear on the menu.  
 IMPORTANT: DO NOT change the spread lines for other recipes.  
 Hint: Use the Up and Down arrows to place the menu item in the correct order.
6. Click the  radio button next to the **MAIN** menu item and Click the  Checkbox next to the **ALTERNATE** menu item.
7. Click .
8. If needed, update spread line numbers to be in numerical order.
9. Update **Popularity Index** for more accurate production and purchasing reports.
10. Click on the  checkbox next to both recipes. Click **Spread Checked**. Make sure all diet restrictions in use are under **Spread To** on the right. Use the **Select>** and **<Remove** buttons to adjust. Click **Next**. The system will list any missing recipe replacements – these must be coded before proceeding. Click **Next**. Click **Spread**.

### Swap Existing Alternate Recipe to Menu





*Example: If you want to swap the existing main and the alternate recipes on a particular day and meal.*

1. Navigate to **Cycle Menu Planning** and click on  **Edit Menus**.
2. Choose the **Day** and **Meal** you want to adjust the relationship for using the dropdowns.
3. Click the check box next to the **ALTERNATE** menu item, click . This will remove the relationship.
4. Click the  radio button next to the new **MAIN** menu item and click the  checkbox next to the new **ALTERNATE** menu item.
5. Click .
6. Update the spread line numbers to be in numerical order.
7. Update **Popularity Index** for more accurate production and purchasing reports.
8. Click on the  checkbox next to both recipes. Click **Spread Checked**. Make sure all diet restrictions in use are under **Spread To** on the right. Use the **Select>** and **<Remove** buttons to adjust. Click **Next**. The system will list any missing recipe replacements – these must be coded before proceeding. Click **Next**. Click **Spread**.

## Review Spread Lines

Background: Spread lines are used to assign what order menu items appear on the menu calendar and diet spreadsheet. Spread lines are also used when the menu is spread to therapeutic diets.


### Steps:

1. To preview the entire menu, navigate to [Reports](#) from the homepage and click on  [Menu Reports](#). Navigate to [At A Glance/Selective Menu Reports](#) and click on  [Week At A Glance Reports](#). Click the  checkbox next to desired format (Menu Solutions recommends *Week at a Glance (Letter Size, Landscape)*). Click [Next](#).
2. Use the dropdown menu under *Menu Cycle* to make sure the correct menu is selected. Click [Next](#).
3. Use the [Select All>>](#) button to move all meals under *Selected Meals*. Click [Next](#).
4. By default, all Menu Planning Groups and Alternates (if applicable) will be selected. If you would like to remove a Menu Planning Group or Alternate from the report, use the [<<Remove](#) button to move to the left. Click [Next](#).
5. Click [Print](#). Your report will generate in a separate pop-up window. Right-click on the report to print or save to your computer. Review this report for correct menu item order.  
**Hint:** If the report does not come up after clicking [Print](#), make sure any pop-up blockers on your browser are disabled.
6. To make changes to the menu order, the spread line numbers must be updated. Navigate to [Cycle Menu Planning](#) and select  [Edit Menus](#).
7. Next, the system may ask you to choose a menu cycle. Click directly on the menu cycle you want to edit.
8. From the 'Edit Menus' screen, spread lines are listed under the *Spread Line* column to the right of the screen. For every meal, each recipe has a spread line. Each recipe spread line must be unique. Enter or update spread line numbers as needed.  
**Hint:** BluePrint recommends assigning spread lines by 10s to allow for easy recipe addition.
9. After modifying the spread line numbers, click on the check box next to each item you changed. Then click on the Spread Checked button and follow the prompts.  
**Important:** This step is necessary to ensure your spread line changes copy over to your therapeutic diets.
10. **Recipes will appear in numerical order of spread line in reports**, regardless of order on the 'Edit Menus' screen. Click the checkbox next to a menu item and use the arrow icons to move it up or down on the screen.  
**Important:** Moving recipes up or down on the 'Edit Menus' screen WILL NOT adjust their placement on reports.
11. To preview a meal for how it will look on reports, click on: 

## What To Do for A ‘Missing Replacements’ Error Message

Background: The Menu Solutions Team provides customers with menu templates that are already spread to 22 therapeutic diets. Therefore, it is important to make sure that you choose the **“Spread Changes to other Diets”** option when making menu changes at the Week at a Glance Screen.



There may be instances where you will come across a **‘Missing Replacements’** error message when making a menu change. The message that appears will look similar to this:

 **These 1 menu items are missing replacements for this spread operation.**

Menu Item: **Soup Chicken Gumbo (scr) - 6 oz ladle** ◀ ◁ 1 of 1 ▶ ▷

There are several things that can cause this message to appear. Use the following tips to troubleshoot and fix the missing replacements.

- **Ingredients vs. Recipes**

Recipes are indicated by the  cookpot icon and ingredients are indicated by the  carrot icon.

Therapeutic diet extensions are set up at the Replacements Tab of a recipe. They will not be set up if you are adding an ingredient to the menu.

- **Therapeutic Diet Recipes**

If you are trying to add a Therapeutic Diet Recipe to your menu, the system will not be able to spread menu changes to your therapeutic diets as these recipes do not have replacements assigned. Ensure that you are searching and adding Regular Diet Recipes only to your menu. This will prevent the Missing Replacements screen from occurring.

**Hint:** Therapeutic Diet recipes include ground, pureed, low sodium (LS), and diet desserts to name a few.

- **Custom Therapeutic Diets or Thickened Liquid Diets**

If you have Custom Therapeutic Diets or Thickened Liquid Diets assigned to your menu. The missing replacements message will appear. It is recommended to set up the replacement at this screen. Click on the checkbox to the left of each diet needing replacements for each recipe. Click **Edit Checked**. Specify the replacement.

**Hint:** Replacements that are set up at the ‘Missing Replacements’ screen will be saved for future use.

**Hint:** Replacements for a recipe can also be added or changed directly in the **Replacements** tab of that individual recipe.

- **Custom Recipes**

If you did not assign replacements at the Replacement Tab of a recipe that was entered from scratch and then add the recipe to your menu, you will get the Missing Replacements message. If missing replacements are found, click on the checkbox to the left of each diet needing replacements for each recipe. Click **Edit Checked**. Specify the replacement.


**Hint:** Replacements that are set up at the ‘Missing Replacements’ screen will save for future use.

**Hint:** Replacements for a recipe can also be added or changed directly in the **Replacements** tab of that individual recipe.






## Remove & Replace Menu Items

Background: Menu Item Remove Replace is a function in the BluePrint System to make it quick and easy to find similar recipes on a menu and replace them with a different recipe or remove them from the menu completely. This function can be used to modify the regular diet and automatically spread to your therapeutic diets or you can modify items specific to a therapeutic diet.

### Menu Item Remove Replace (Regular Diet)

1. Navigate to **Cycle Menu Planning** and select  **Menu Item Remove Replace**.  
Next, the system may ask you to choose a menu cycle. Click directly on the menu cycle you want to edit.

**Hint:** Make sure the correct Menu Cycle is chosen. If not, navigate to **Switch Cycle**.

2. Under  indicate if you want to **Remove** or **Replace** recipes.  
**Important:** Check the box 'Spread changes to other diets'.
3. Under  by default the **Regular/No Added Salt** is chosen as the source for spreading.
4. Under  &  indicate which days and meals you want the system to search for recipes.
5. Under  type the name of the recipe you want to remove or replace. Click **Go**.








→ If **REMOVING** items, click on the check box next to recipe(s) to be removed. Click **Next**. The system will list every time this recipe appears on your menu. Click **Done** and the recipe will be removed from your menu.

→ If **REPLACING** items, click on the check box next to recipe(s) to be replaced. Click **Next**. Type the name of the recipe with which you want to replace the current item. Click **Go**. Click on the radio button next to the recipe you want as the replacement. Click **Next**. The system will list every time the recipe will be replaced. Click **Done** and the recipe will be replaced on your menu and automatically spread the replacement to therapeutic diets.

6. You can easily see menu changes from the  **Week at a Glance** view.













## Remove & Replace Menu Items (Specific Therapeutic Diet)

*Example: You want to replace pureed bread on your Mechanically Altered diet to regular bread. The system will capture every time pureed bread is on the menu and replace with regular bread for this therapeutic diet. This change will update the entire menu cycle. This will not update the extension permanently. Use the **Permanently Edit Therapeutic Diet Replacements and Update Menu** quick guide to help you make permanent changes to replacements for future menu cycles.*

1. Navigate to **Cycle Menu Planning** and select  **Menu Item Remove Replace**.
2. Next, the system may ask you to choose a menu cycle. Click directly on the menu cycle you want to edit.  
**Hint:** Make sure the correct Menu Cycle is chosen. If not, navigate to **Switch Cycle**.
3. Under  indicate if you want to **Remove** or **Replace** recipes.  
**Important:** **Uncheck** the box 'Spread changes to other diets'.  
Under  Remove the Regular Diet to the left and Select the therapeutic diet you want to modify to the box on the right.
4. Under  &  indicate which days and meals you want the system to search for recipes.
5. Under  type the name of the recipe you want to remove or replace. Click **Go**.  
  - If **REMOVING** items, click on the check box next to recipe(s) to be removed. Click **Next**. The system will list every time this recipe appears on your menu. Click **Done** and the recipe will be removed from your menu.
  - If **REPLACING** items, click on the check box next to recipe(s) to be replaced. Click **Next**. Type the name of the recipe with which you want to replace the current item. Click **Go**. Click on the radio button next to the recipe you want as the replacement. Click **Next**. The system will list every time the recipe will be replaced. Click **Done** and the recipe will be replaced on your menu.
6. You can easily see menu changes from the  **Edit Menus** view by using the **Therapeutic Diet** dropdown.

## Create Combination Diets

Background: Combination diets (i.e “Diabetic/Cardiac” or “Renal/Small Portion”) can be created in the BluePrint System. To make this as easy as possible, the Menu Solutions team recommends copying one of the desired combination diets, then making edits to specific menu items to make the diet compliant with both diet restrictions. **Important:** Follow these instructions after you are done making menu changes & all other therapeutic diets are set.

1. Navigate to **Data Setup** from the home screen and select  **Settings**. Then, navigate to **Clinical Settings** then  **Diet Settings** and select  **Diet Restrictions**.
2. Click **Add**. For **Description** – type the name of the Combination Diet, ex. Renal Diabetic, For **Code** – add an abbreviated name for combination diet, ex. RenalDB and For **Consistency Name** - use the dropdown menu to set to **Diet Order**. Click **Save**, then **Done**.
3. Return to the homepage. Navigate to **Cycle Menu Planning** and select  **Manage Menu Cycles**. Click directly on the name of your menu.
4. In , select the new combination therapeutic diet by moving it to the box on the right. Click **Done**.
5. Click **Edit Menus** from the homepage. Click **Copy Meals**. On the left, select **Diet Restriction** and use the drop down to select one of diets to copy. On the right, select **Selected Diets** and highlight the combination diet. Click **Next**.
6. Under , select **All Meals**. Under **Destination**, select **All Meals**. Click **Next**.
7. Under , select **All**. Under **Destination**, select **All**. Click **Next**.
8. Under , confirm by clicking **Copy**.
9. Make changes to the combination diet. Click on  **Edit Menus** from the homepage. Use the drop downs to go to the new combination diet and go through the menu meal by meal.  
**Hint:** Go to  **Menu Reports**, then  **Week at a Glance Reports** or **Diet Spread Reports**. Run a report to easily view the entire combination diet menu at once & identify recipes to change or to compare it against existing diets.
10. Delete recipes inconsistent with the combination diet using the **Delete Checked** button from the ‘Edit Menus’ screen. To replace the recipe, take note of the spread line number of deleted item. Then, add appropriate item using the **Add Items** button. Assign the same spread line to the new item as the deleted item.  
**Hint:** Global changes can be made to the combination diet from the  **Menu Item Remove Replace** screen. This can save a considerable amount of time.




## How to Add Diet Restrictions and Make Menu Changes

**Background:** The BluePrint System offers 22 therapeutic diets. If you do not see a diet that you have at your facility, it can be added to the system and assigned to your cycle menu. Special menu templates for various special diet restrictions are available (Low Gluten, Heart Healthy, Mediterranean, Clear Liquid, Full Liquid, etc.) and can be copied into the diet restriction you create.



**Important:** Add the special diet(s) to your primary cycle menu *after* the primary cycle menu has been spread.

**Important:** Copy & customize the special menu template of choice prior to following these steps.


### Step 1: Create Custom Diet Restriction

1. Navigate to **Data Setup** from the home screen and select  **Settings**. Then, navigate to **Clinical Settings** then  **Diet Settings** and select  **Diet Restrictions**.
2. Add custom therapeutic diet to system. Click **Add**. Enter the name in the **Description** field, enter an abbreviated name in the **Code** field and add the **Consistency** (use the dropdown menu to set to **Diet Order**). Click **Save**, then **Done**.

### Step 2: Assign Diet(s) to Menu Cycle

1. From the homepage, navigate to **Cycle Menu Planning** and click on  **Manage Menu Cycles**.
2. Click directly on the name of the cycle menu to assign diets to.  
**Hint:** If you do not see your recently added diet, please log out of the system and log back in.
3. Under  **Select Diet Restrictions:** move the special diet(s) to the right.  
**Important:** This should be done AFTER your menu is spread to standard BluePrint therapeutic diets.

### Step 3: Copy Special Diet Template(s) into Custom Diet Restriction(s)

1. From the homepage, navigate to **Cycle Menu Planning** and click on  **Edit Menus**. Click on **Copy Meals**.
2. Under **Source**, click on **Select**. Choose the  radio button next to the menu to be copied into the diet restriction. Click **Select**.  
**Important:** After selecting a menu, the diet restriction listed on the left should be "Regular/NAS"  
**Hint:** If the desired diet template is not listed, contact Menu Solutions to publish special diet templates to your BluePrint system.
3. Under **Destination**, click the  radio button next to **Selected Diets**. Click on the custom diet restriction to be copied into. Click **Next**.
4. Under **Source**, click on the  radio button next to **All Meals**. Under **Destination**, click the  radio button next to **All Meals**. Click **Next**.
5. Under **Source**, click the  radio button next to **Range** and highlight the weeks you want to copy. Under **Destination**, click on the  checkbox for the weeks of your cycle menu. Click **Next**. Click **Copy**.  
**Hint:** The special menu template menus range from 1-4 weeks in length. If your menu is longer than the template chosen, all days longer than the template will not have menu items listed in the diet restriction. Use the **Copy Meals** function to copy week 1 of the diet into later week(s).




## Spread Menu to Therapeutic Diets

Background: BluePrint standard menu templates have already been spread to all 22 BluePrint standard therapeutic diets. However, if you have found that you have done several edits, or your diet spreadsheet does not look updated or accurate, spreading your menu over again is a good solution. The BluePrint System will spread the menu to therapeutic diets based on what is coded in the “Replacements” tab of each recipe on the menu.




### Steps:

1. Make sure the menu is ready to spread.

- **Review each meal for correct recipes and order**



It is more difficult to make changes to recipe order after spreading your menu. Click on  [Menu Reports](#) from the homepage. Click on  [Week At A Glance Reports](#). Work through the prompts to print the report. Review the report for correct menu item order. To make changes to order, click on  [Edit Menus](#) from the homepage and adjust the spread line number. Recipes will appear in numerical order of spreadline.

- **Make sure only recipes (NOT ingredients) are on your menu**

If ingredients are on the menu, the system will not be able to spread to your therapeutic diets as ingredients do not have replacement’s assigned. Navigate to [Cycle Menu Planning](#) and select  [Create Recipe List](#). Run the list for your entire menu cycle and all meals. Click [Go](#). Use the arrows at the top right to review all recipes and make sure all items are recipes indicated by the  cookpot and are not ingredients indicated by the  carrot.

**Hint:** If ingredients are on the menu, use the  [Menu Item Remove Replace](#) from the home screen to replace ingredients with recipes.

- **Make sure correct therapeutic diets are selected**

Navigate to [Cycle Menu Planning](#) and select  [Manage Menu Cycles](#). Click on the name of the menu to be spread. Under  , review diet restrictions selected. Therapeutic diets that you want to spread to should be in the right column with the **Regular diet listed first.**

2. Spread your menu. Navigate to [Cycle Menu Planning](#) and select  [Edit Menus](#). Click on [Spread Meals](#).

3. Select *All Days* and *All Meals*. Click [Next](#).

4. Next, the system will identify recipes on your menu without replacements assigned. Missing replacements must be assigned before continuing. If no missing replacements are found, click [Next](#).

**Hint:** If missing replacements are found, click on the checkbox to the left of each diet needing replacements for each recipe. Click [Edit Checked](#). Specify the replacement.

5. Next, the system will list a preview of replacements for each recipe on the menu. Click [Spread](#).

**Hint:** If you want to change replacements, click on the recipe name and navigate to the *Replacements* tab to change. Click [Done](#) to continue to spread the menu.

6. The system will bring you back to the  [Edit Menus](#) screen once spreading is complete.


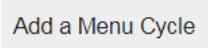












7. Go to  [Menu Reports](#) and run  [Diet Spread Reports](#) to review your spreads.


**Hint:** The Menu Solutions team recommends running the Diet Spreadsheet X-Format report option.



## Create A Custom Menu




Background: Rather than copying an existing US Foods menu template, you may create a cycle menu from scratch.

### Steps:

1. Navigate to **Cycle Menu Planning** and select  **Manage Menu Cycles**.
2. Click  button found in the upper right-hand corner.
3. On the next page, for , enter a menu **Name** and **ShortName**.
4. For , **Select Diet Restrictions**. First, click on the Regular/No Added Salt Diet and use the **Select** button to move the diet over to the box on the right. Continue this step for all diets included on the menu.  
**Important:** The Regular/No Added Salt diet should be the first listed diet in the box on the right.  
**Important:** DO NOT select Thickened Liquids, Tube feeding, NPO or Full/Clear Liquid Diets.
5. For , enter the **Cycle Length**. This is the number of days in your cycle menu. For example, a 4 week cycle menu is 28 days.
6. For , use the  calendar icon to select the **Start Date** and **End Date** of the menu cycle. If the menu begins on a Sunday, select a Sunday start date and a Saturday end date.
7. For , use the drop down box to select a **Menu Status**. Select **In Progress** while editing the menu. Select **Active** once the menu is finalized. Select **Inactive** to archive the menu.  
**Hint:** Menu Status is used to categorize menus in  **Manage Menu Cycles**. Edits cannot be made to **Inactive** menus. To edit the menu, change the **Menu Status** to **In Progress** or **Active**.
8. Optional: For , enter the **Average Daily Cost Target** range for the menucycle.  
**Hint:** The Average Daily Cost Target can be entered as a reference for the menu. It WILL NOT track if the menu PRD is above/below target range.
9. Click the  button on the top right to create the menu template.
10. Click the  button and navigate to  **Edit Menus**.
11. On the next page, use the  Day: 1  Meal: Breakfast  Diet: Regular/No Added Salt **Day** and **Meal** drop down boxes to navigate to desired day and meal to edit. The **Diet** drop down box will default to the Regular/No Added Salt diet.

12. Use the  button to search for recipes to add to the menu.

**Important:** Add  recipes to the menu, not  ingredients.

13. Unique spread line numbers will need to be assigned to each menu item within a meal. Spread lines are listed under the *Spread Line* column to the right of the screen. **Recipes will appear in numerical order of spread line in reports, regardless of order on the 'Edit Menus' screen.** Click the checkbox next to a menu item and use the   arrow icons to move it up or down on the screen. To preview a meal for how it will look on reports, click on: . Continue this step until all desired menu items have been added to every meal.

**Hint:** BluePrint recommends assigning spread lines by 10s to allow for easy recipe addition.

**Important:** Moving recipes up or down on the 'Edit Menus' screen WILL NOT adjust their placement on reports



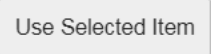
14. Follow the steps in the *Spread Menu to Therapeutic Diets* quick guide to spread the menu to your therapeutic diets.

## Edit Therapeutic Diet Replacements and Update Menu

Background: All BluePrint standard menu templates have already been spread to all BluePrint standard therapeutic diets. However, you may find that some replacements need to be changes based on facility specific guidelines. Follow these steps to make changes to therapeutic diet replacements.

### Steps:





*Example: You want to replace Pured Bread on your Mechanically Altered diet to Regular Bread. The system will capture every time pured bread is on the menu with regular bread for this therapeutic diet. This change will update the extension permanently.*

1. Navigate to **Cycle Menu Planning** and click on  **Edit Menus**.
2. Choose the **Day** and **Meal** from the drop downs to find the specific recipe that needs adjusting.
3. Click directly on the name of the recipe – this will bring you to the **Recipe** tab of the recipe.
4. Navigate to the **Replacements** tab.
5. Click the  checkbox(s) next to the diet restriction(s) that needs to be changed.
6. Click **Edit Checked**.
7. A box will appear, click the  button.
8. Search for the item you would like to be used as the replacement. Click the radio button next to the item and  .
9. Click **Done**. You will notice that the new item has been replaced with the default replacement item.
10. Click **Done** until you return to the Edit Menus Screen.
11. Click on the  checkbox next to the recently modified recipe. Click **Spread Checked**. Make sure all diet restrictions in use are under *Spread To* on the right. Use the **Select>** and **<Remove** buttons to adjust. Click **Next**. The system will list any missing recipe replacements – these must be coded before proceeding. Click **Next**. Click **Spread**.

## Diet Census Forecast Tally and Print Production Reports

Background: Follow these steps to print Production reports. The Diet Census Forecast Tally gives consolidated counts, across all diet restrictions, of the number of portions needed for each recipe and each selected meal.


### Steps:

1. Navigate to **Cycle Menu Planning** and select  **Diet Census Forecast Tally**.  
*Hint:* The system will default to the last selections. Click Switch Cycle if the default menu cycle needs to be updated.
2. Select the desired Menu Cycle from the list by clicking on its name.  
*Hint:* Check **Previous tally for selected Service Unit** for the last tally run date.
3. If applicable, select a **Service Unit** from the drop-down list.
4. By default, all **Meal(s)** will be selected. Adjust as needed.  
*Hint:* To select multiple Meals, push and hold the **Ctrl** key while making your selections.
5. Click on the  calendar icon to select the **Start Date** and the **End Date** for the range of days you wish to include.
6. Enter a **Quantity** for each Diet Restriction.
7. Click  .
8. When completed a message will appear that says *'Tally generation for the selected Meals completed'*. Navigate back to the Home Screen to generate your Production Reports.
9. Navigate to **Reports** and select  **Production Reports**.
10. Select one or more of the following reports by clicking the box next to the report, then click **Next**:

**Suggested Reports Include:**

|   |   |
|---|---|
| Production Distribution and Leftovers Worksheet | This report tells the production staff how much of each item to prepare for each meal and each production unit for a given time period. It also provides a space to manually write in how many portions were prepared and how much was leftover. A good report to document waste.   |
| Production Summary Worksheet with Temperatures  | This report summarizes the production needs for all service units for which the production unit prepares foods. It provides an area where the staff can manually write in how many portions of each item are prepared and/or leftover, the cooking and holding temperatures of each food item and any corrective action that is needed to be taken. |
| Production Recipe with Nutrition                | This report not only provides the recipe itself it also displays the nutrition analysis for a single portion of the recipe.   |

**11. Select Menus for Production**


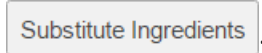

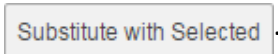

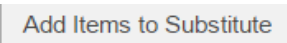
- Select the **Unit(s)** you wish to include.  
*Hint:* In order to select multiple Units, push and hold the **Ctrl** key while making your selections.
- Using the  calendar icons, enter the **Date Range** to include in the report(s).
- Enter the appropriate number in the **# of Days to Look Ahead** box.  
*Hint:* This option should be used if a menu item needs to be produced during the range of this report but will be served in the future.
- Choose the **Prep Area(s)**.  
*Hint:* If no selections are made, the system will include all Prep Areas. To select multiple Prep Areas, push and hold the **Ctrl** key while making your selections.
- If you wish to include Advance Withdrawal products click the checkbox.  
*Hint:* If this option is selected, a separate section will list the items that must be withdrawn from storage during the report's date range.
- If you wish to include Advance Production recipes click the checkbox.  
*Hint:* If this option is selected, a separate section will list the items that must be produced during the report's date range but served on a later date.
- Click **Go**. Report will pop up in a separate PDF pop-up window.

## Ingredient Substitution

Background: The Ingredient Substitution function allows users to change a single ingredient to another ingredient everywhere in the system. This will assist with generating an accurate product specific shopping list, generating live orders from the system and ensuring nutritional reports are accurate.

Note: Users may access  [Ingredient Substitution](#) from the home screen or from a shopping list.

### Steps:

1. After finalizing a cycle menu, navigate to **Cycle Menu Planning** from the home screen and select  [Create Shopping List from Menu](#).
2. Run a shopping list for the entirety of your current cycle menu. Click **Go**. Review the shopping list and identify ingredients that need to be replaced with a different ingredient.  
**Hint:** Export your shopping list to excel to mark up a master list of ingredients that need to be replaced.
3. Check the box to the left of the ingredient that needs to be replaced and click . Click  to the right of the ingredient that needs to be replaced. Type in the replacement ingredient name and click Go. Select the radio button to the left of the replacement ingredient and click . Click **Done**.  
**Example:** Replace frozen green beans with fresh green beans based on what your facility actually purchases.  
**Hint:** Click on the number under the 'recipes' column to see all recipes effected by that ingredient substitution.
4. If you see an exclamation  in the 'adjust quantities' column, click on this icon and correct the missing unit of measure as it relates to the original ingredient.
5. Click **Done** to navigate back to the shopping list or click  to search for the next ingredient that needs to be replaced.


**Important:** Substituted ingredients will remain in the system unless you inactivate them by clicking the check mark under the 'active' column. Substitutions can be entirely deleted by clicking the trash can icon under the 'remove' column.



## **ADVANCED BLUEPRINT TOPICS**

## Copy Meals

Background: Use the steps below to copy meals on your cycle menu template. The entire menu, elected days, selected meals, or selected diet restrictions can be copied to other locations.

1. From the homepage, go to  **Edit Menu**.

**Hint:** Make sure the correct Menu Cycle is chosen. If not, navigate to [Switch Cycle](#) in the top right corner.

2. Click  **Copy Meals** in the top right corner.

➤ **#1** Select the Diet Restriction to Copy

- If you want to copy the menu for a single diet restriction, select the  icon next to **Diet Restriction** below **Source**. Click in the box and select the **Source Diet Restriction** you want to copy from and then select the  icon next to one of the **Destinations**. Click Next.
- If you want to copy from all **Diet Restrictions**, select the  icon next to **All Diet Restrictions**. Click Next.

**Note:** Click on [‘Select’](#) below Source to change the menu template used as the source of copying meals.

➤ **#2** Select the Meals to Copy

- If you want to copy all meals from the menu, select the  icon next to **All Meals** under both **Source** and **Destination**. Click Next.
- If you want to copy only certain meals, select the  icon next to **Selected Meals** under both **Source** and **Destination**. Select the meals you want to copy in the box below **Source** and the meals you want to copy to under **Destination**. Click Next.


➤ **#3** Select the Cycle Days to Copy

- If you want to apply to all cycle days, select the  icon next to **All** under both the **Source** and **Destination**. Click Next.
- If you want to copy the current cycle day, select the  icon next to **Current** below **Source**. Select one of  icons below **Destination** to control which days will be copied into: Current Day, All Days in the cycle menu, or Range of Days. Click Next.
- If you want to specify which cycle days to copy, select the  icon next to **Range** below **Source** and select a range of days or individual days from the calendar below. Select the icon next to **Range** below **Destination** and select a range of days or individual days from the calendar.

➤ **#4** Confirm and Copy

- This page summarizes the choices you made in the previous steps. If the choices are accepted, click **Copy** to proceed.




**Note:** Click [‘Back’](#) to make any final changes before copying.

- Once successfully copied, a confirmation message will appear on the screen and sent back to the  **Edit Menu** page.




## Create a Custom Recipe

Background: The BluePrint system includes over 10,000 recipes. However, if you would like to create a custom recipe, this can be done in the BluePrint system. There are two ways to create a custom recipe in the BluePrint system.

### Copy and Adjust a Recipe (Recommended)

1. Navigate to **Ingredient and Recipe Maintenance** from the home screen and click on  **Ingredient and Recipe Search** to find a recipe similar to the custom recipe to be created.
2. Once in the recipe, click **Copy**. Name the recipe. Leave Key Name blank. Check the box next to **Copy Replacements**. Click **Save**.
3. Review **General Info** tab for correct *Item Name*, *Common & Formal Name* (to appear on At a Glance reports), *Short Name*, *Prep Area*, *Portion Unit* (1 serving of recipe) and *Yield Unit* (total amount recipe produces).
4. Review **Recipe** tab. Adjust the ingredients using the **Add Item**, **Delete Checked** and arrow buttons ( & ). Adjust instructions by clicking directly on the instructions. Review recipe yield amount and portion sizes.
5. Review **Production** tab. Code *Advance Production* if applicable.
6. Review **Replacements** tab for correct therapeutic diet spreads. Click on **Edit Checked** to make changes.
7. Click **Done**. Do not forget to add your custom recipe to the menu!

### Create a Recipe from Scratch

1. Navigate to **Ingredient and Recipe Maintenance** from the home screen and click on  **Add a New Recipe**.
2. Create *Recipe Name & Short Name*. Use the dropdowns to identify *Course* and *Menu Planning Group*. Enter quantities for *Recipe Yield* and *Portions*. Click **Next**.  
**Hint:** The “Recipe Yield” refers to how this recipe is batch produced. For example, Brownies: 2 – 20x12x2 Pan, Soup: 1 – 5 Gallon, Sandwich: 50 – Sandwich, Potatoes: 50 – ½ cup. “Portions for Full Recipe” refers to how the food is served (ex: brownies: 50–2x3 square, soup: 50–6 oz ladle, sandwich: 50–sandwich, potatoes: 50–½ cup)
3. Review **General Info** tab for correct *Item Name*, *Common & Formal Name* (to appear on At a Glance reports), *Short Name*, *Prep Area*, *Portion Unit* (1 serving of recipe) and *Yield Unit* (total amount recipe produces).
4. Go to **Recipe** tab. Add ingredients using the **Add Item**, **Delete Checked** and arrow buttons ( & ). Add instructions by clicking **Add Instruction**. Review recipe yield and portion sizes.
5. Assign *Advance Production* from the **Production** tab if applicable.
8. Go to the **Replacements** tab. Assign replacements for each therapeutic diet your facility uses using the **Edit Checked** button.
6. Click **Done**. Do not forget to add your custom recipe to the menu!

## Create Custom Therapeutic Diet

Background: Custom therapeutic diets can be created in the BluePrint Menu Management™ system. BluePrint recommends identifying an existing therapeutic diet similar to the custom diet to be created, copying all meals from the existing therapeutic diet then modifying as appropriate.

*Note: Make sure to follow these instructions **after** spreading menu to standard therapeutic diets.*

### Steps:


1. Navigate to **Data Setup** from the home screen and select **Settings**. Then, navigate to **Clinical Settings** and select **Diet Settings** and select **Diet Restrictions**.
2. Add custom therapeutic diet to system. Click **Add**. Complete the **Name**, **Short Name** and **Consistency Name** (use the dropdown menu to set to *Diet Order*). Click **Save**, then **Done**.
3. Return to the homepage. Navigate to **Cycle Menu Planning** and select **Manage Menu Cycles**. Click on the name of the menu to assign therapeutic diet.
4. Assign custom therapeutic diet to menu cycle. Under select the new therapeutic diet by moving it to the box on the right. Click **Done**.
5. Click **Edit Menus**.
6. Copy existing therapeutic diet into custom therapeutic diet. Click **Copy Meals**. On the left, select **Diet Restriction** and use the drop down to select the existing diet to copy. On the right, select **Selected Diets** and highlight custom diet. Click **Next**.
7. Under , select **All Meals**. Under **Destination**, select **All Meals**. Click **Next**.
8. Under , select **All**. Under **Destination**, select **All**. Click **Next**.
9. Under , confirm by clicking **Copy**.
10. Make changes to the custom therapeutic diet. Click on **Edit Menus** from the homepage. Use the drop downs to go to your new diet restriction and through the menu meal by meal.  
 Hint: Go to **Menu Reports**, then **Week at a Glance Reports**. Run a report for the custom therapeutic diet restriction to easily view the entire menu at once and identify recipes to change.
11. Delete recipes inconsistent with the custom diet using the **Delete Checked** button from the 'Edit Menus' screen. Take note of the spread line number of deleted item. Then, add appropriate items using the **Add Items** button. Assign the same spread line to the new item as the deleted item.

Consider contacting your BluePrint point person to determine the best way to create your custom therapeutic diet.

## Create Shopping List & Upload to USFoods.com

Background: A shopping list can be generated from the menu; the shopping list is all the ingredients required to produce the menu. Your shopping list can be uploaded into USFoods.com.

### Create Shopping List

1. Navigate to **Cycle Menu Planning** from the homepage. Click on  **Create Shopping List from Menu**.
2. Next, the system may ask you to choose a menu cycle. Click directly on the menu cycle you want to edit.
3. Run the shopping list for all days of your cycle menu and all meals. Click **Go**.
4. Review all ingredients on the menu and the **Selected Vendor Item** column. Different vendor items can be selected using the drop down. The shopping list will default to items already on your order guide or GPO contracted items.

**Note:** The Menu Solutions Team recommends reviewing the vendor items on your shopping list. Refer to the '**Vendor Item Review & Primary Vendor Items**' Quick Guide.

### Upload Shopping List to USFoods.com




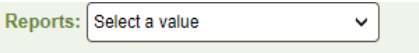


1. From the shopping list, click **Export US Foods Shopping List**.
2. Use the dropdown menu to select your US Foods division. Type a name of the file. Click **Export US Foods Shopping List**. A .csv file will be saved to your computer.
3. **In USFoods.com**, hover over **List: Order Guide**. Click on **Create List +**.
4. Click **IMPORT LIST**. Click **Choose File**. Find the .csv file on your computer; click **Open**. Ensure **CSV** is selected under **Data Format**. Type a name for the list under **New List Name**. Click **Create**.

## Create Purchase Order

Background: The Order Worksheet is a tool to create a purchase order based on your US Foods delivery days. The Order Worksheet can be created for a certain date or date range of your current cycle menu. It also lists the needed quantity of each menu item based on your census and shelf count of items.

*Note: It is recommended to Create a Shopping List from Menu first to review the default products selected. Refer to 'Create Shopping List' and 'Vendor Item Review & Primary Vendor Item' Quick Guides.*

### Steps:

1. Navigate to **Purchasing** and select  **Order Worksheet**.
2. Click **New** in the top right corner.
3. Fill out the following information in these areas:
  - a. **Description:** A title or description for this purchase order
  - b. **Unit:** Select the name of your facility
  - c. **Vendor:** Select the name of your US Foods division
  - d. Select your **Delivery Date**  : The date that you expect the items to be delivered
  - e. Select your **Date Range**  : The system will analyze your menu for the selected date range and list all items needed for those dates.
  - f. Click **Create** in the top right corner.
4. Above the list of items, the page displays information about the order worksheet – **Unit, Vendor, Delivery Date, Covering these Dates**.
5. The **Reports** dropdown to the right  contains a list of reports that can be used to verify the shelf count of the items.
  - a. The **Order Worksheet** report displays a list of all items on the worksheet. This report can be taken to the storage locations at your facility to verify shelf counts and then enter the quantities of those items on the worksheet.
6. The list of items are sorted by **Product Group**. Click the arrows to left  of each **Product Group** to expands the list of items contained within the grouping.
  - a. Click on the  **Star Icon** located to the left of the item to display the date and meal that ingredient in a recipe on your menu.

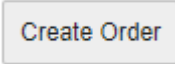
- b. **Qty Needed** Column displays the quantity of the ingredient that is needed to satisfy production for the date range entered.
- c. **Shelf Count** Column displays the calculated shelf count based on the items On Order quantity and menu needs within the past 7 days. A different shelf count can be entered here which will be used by the system to adjust the recommended **Order Quantity**.
- d. **Stock Unit** Column shows the default counting unit for the item. You can select a different stock unit from the drop-down list as it applies to the shelf count.
- e. **Order Quantity** Column shows a rounded order quantity calculated based on requirements for the worksheet, calculated for delivery days. You can enter a different order quantity if needed.
- f. **Purchase Unit** Column shows the item’s default purchase unit as it applies to the order quantity.

**Add Items**

1. Click the **Add Items** button if you wish to add any additional items to the Order Worksheet.
2. Enter the name of the Item in the **Name** box.
3. Click **Go**.
4. Click the checkbox in front of the desired items.
5. Click **Done**.
6. Click **Save**.

**Delete Items**

1. Click the checkbox in front of the Item you wish to delete.
2. Click the **Delete Checked** button.
3. Click **Save**.

7. When you are finished editing the **Order Worksheet**, click  **Create Order** at the upper right of the page. This will create a single purchase order to your US Foods vendor and launch the *Edit Order* page where you can review, edit, and place the order directly with USFoods.com.



## Link Vendor Items to Ingredients

Background: Each ingredient in the BluePrint™ system has multiple US Foods products linked to it. All of these products are available to select on shopping lists and orders. If a specific US Foods product you want to purchase is not already linked to an ingredient, you are able to link it yourself. There are two ways to link vendor items to ingredients.

### → Link US Foods products from Ingredient (Recommended)

1. Access ingredient you wish to link a product to:




Option 1: Navigate to  [Create Shopping List from Menu](#) from the homepage. Run the shopping list for all days of your cycle menu and all meals. Click [Go](#). Click on the name of the ingredient.

Option 2: Navigate to [Item Maintenance](#) from the homepage. Click on  [Ingredient and Recipe Search](#). Type the name of the ingredient, click [Go](#). Click the  checkbox next to ingredient , then click [Select Checked Items for Edit](#). Click [Done](#).

2. Go to the [Purchasing](#) tab. Click on [Linked Vendor Items](#). Then, click [Link Vendor Item](#).
3. Search for the product by product number. Click [Go](#).
4. Click the checkbox next to the correct product. Click [Link Selected Item](#).
5. Change the *Linked Purchase Unit* column to match the actual purchase unit.

**Hint:** If correct purchase unit is not in dropdown, contact your BluePrint point person to add a unit of measure.

### → Link US Foods products from Vendor Item Maintenance

1. From the home screen, navigate to [Data Setup](#) and click on  [Vendor Item Maintenance](#).
2. Click on  [Edit Vendor Items](#). Search for the product by product number. Click [Go](#).
3. Click the checkbox next to the product. Click [Add Checked Items](#). Click [Done](#).
4. Click the [Grid Editor](#) tab. The Linked Item column will indicate what ingredient this product is linked to. This column will be blank if the product is NOT linked to an ingredient.
5. Click . Search for ingredient to link vendor item. Click [Go](#). Click the  radio button next to correct ingredient. Click [Link Selected Item](#).

**Hint:** Make sure to select the *same* ingredient used on the menu.