



Release 10.0

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Primero *edges*

Release Notes



PrimeroEdge

Release Notes

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Table of Contents

Menu Planning	4
Production	5
Student Eligibility	6
Point of Service	9
Team Work	11
System	12

Menu Planning

General Improvements and Corrections

Assigned Menu Names Not On Calendar

There were reports of Menus not showing up on the Assign Menu screen where Menus had previously been assigned. This behavior was caused when deviating a Site from the Group and assigning a new Menu to a single Site. We corrected the issue in this release.

→ *To access: Menu Planning > Menus > Assign Menus*

Recipe Scaling Report

Recipe step measurements were scaling in weird ways – for example, 1 $\frac{3}{4}$ cup was displaying as 1 $\frac{2}{3}$ cup 4 teaspoon. Please let us know if your recipes scale to measurements that don't make sense on this version or later.

→ *To access: Menu Planning > Ingredients > Recipes*

Acceptability Factor Report

The Acceptability Factor Report now includes NOI columns, which will subtract the Net Off Invoice discount to easily compare with the full cost of products.

→ *To access: Menu Planning > Reports > Acceptability Factor*

General Improvements and Corrections

Station Record Saving

The Stations Record screen was not saving correctly. If not already fixed in your environment, this release should take care of it. Please let us know if you are still having issues saving your Stations Records.

→ *To access: Production > Stations > Stations Records*

Student Eligibility

General Improvements and Corrections

Duplicates on the DC Sibling Match Report

We corrected duplicate entries showing on the DC Sibling Match report.

→ *To access: Student Eligibility > Eligibility Reports > DC Reports > DC Sibling*

Application Status History

An error that spawned while tabbing through entries on the Application Status History tab is now handled appropriately.

→ *To access: Student Eligibility > Applications > Master Index > Application Pop-up > History Tab*

Share Information / Other Benefits Report Update

We split the Other Benefits and Share Information report into two different reports on the same page.

Previously, you were unable to view the Share Information that was provided if there were no Benefits associated. Now, you can view strictly the Share Information responses.

The screenshot shows a web interface for filtering reports. At the top, there is a header 'Other Benefits / Share Information'. Below it are three dropdown menus for 'Area', 'Site Code', and 'Site', all set to '-- ALL --'. Underneath is an 'Academic Year' dropdown set to '2019 - 2020'. There are two radio buttons: 'Other Benefits' (unselected) and 'Share Information' (selected). Below these are three filter boxes: 'Eligibility' with checkboxes for 'Free', 'Reduced', and 'Paid' (all checked); 'Share' with checkboxes for 'Yes' (checked) and 'No' (unchecked); and 'Options' with a checkbox for 'Include Guardian Info' (unchecked).

→ *To access: Student Eligibility > Eligibility Reports > Other Benefits / Share Information*

Online Applications

Address of Online Applicant

We made an update to the Address field in SchoolCafé that shows under Guardian Info for Online Applications. Previously, this displayed as a radio button and is now a checkbox.

Selecting this checkbox and saving the application will update the Address of Applicant to the Address in SchoolCafé.

This should be used for scenarios where an applicant has applied prior to updating their contact information and you want the notification to be sent to the most recent address.

The screenshot shows the 'PrimeroEdge - Guardian Information' window. The 'Guardian Name' field contains 'Johnny Wrong Address'. There are three address options, each with a help icon:

- Address in PrimeroEdge: Address, City, State, Zip, Home, Work, Email fields.
- Address of Applicant: Address: 12345 Fake St, City: Faketown, State: TN, Zip: 55555, Home: 555555555, Work, Email: newname@newlast.com.
- Address in SchoolCafé: Address: 12345 Fake S, City: Faketown, State: TN, Zip: 55555, Home: 555555555, Work, Email: newname@newlast.com.

A tooltip for the 'Address in SchoolCafé' checkbox reads: "This is the contact information from the applicant's SchoolCafé account. Selecting this checkbox will update the Address of Applicant with the SchoolCafé information after the application has been saved." The form also includes 'Optional Info...', 'Guardian Info...', 'Add Member ...' tabs, a 'Signature' checkbox, and a 'Language' dropdown set to 'English'. 'Ok' and 'Cancel' buttons are at the bottom.

→ To access: *Student Eligibility > Applications > Master Index / Validate*

Process Change for Identifying Students

We made a change to how the PrimeroEdge system identifies and links a student in the local database against the information on an online application.

Historically, we treated the Student ID as enough information to identify a student. This could result in the applicant incorrectly keying in an ID, and the application being linked to a different student. While no information on this student was being shown to the applicant, the system would then identify the wrong student and tie them to the application.

To avoid this scenario, we now require that up to the first 4 characters of the Last Name match in the system for the ID to be used. Names shorter than that will still pass, provided they match.

This is strictly a change to the single matching criteria of the Student ID number. We still maintain other criteria for linking a student based on the application's information.

→ *To access: Student Eligibility > Applications > Validate / Master Index*

Point of Service

General Improvements and Corrections

Serving Exceptions

We made a change to speed up the Serving Exceptions page. In addition, the issue of previous Quick Selections still selected after processing the top 10 meals was corrected.

→ *To access: POS > Administration > Serving Exceptions*

Loading Accounts from Patron Details

We fixed the lengthy load time when attempting to view a patron's account information by clicking on their balance in Patron Details. The Accounts page with that patron preloaded should appear more quickly now.

→ *To access: POS/SE > Patrons > Students/Adults > Click on the Current Balance*

Account Adjustments Report

The Account Adjustments report has been updated to include students who are now inactive. Previously, it was only pulling information for active students.

→ *To access: POS > Daily Reports > Transaction Adjustments > Account Adjustments*

Minnesota CACFP Claim

We updated a formatting issue with the CACFP Claim export for the state of Minnesota. If any further issues arise while uploading the claim, please contact Customer Care so we can make additional adjustments.

→ *To access: POS > Reimbursements > Reimbursement Claims*

FSMC Export

The FSMC Export has been updated to pull the configured school code from the FSMC Mappings page instead of Site Configuration.

→ *To access: POS > Management > FSMC Export*

Student Preloaded After Cancellation

A rare scenario occurred where a preloaded student would reappear after hitting cancel on the Accounts > Payments page.

This situation would arise while processing a payment destined for multiple students – the parent has sent in \$20, with \$10 intended for two students. Loading a second student, hitting cancel, and then pressing the Payments button again would load that second student automatically. We corrected this scenario in this release.

→ *To access: POS > Patrons > Accounts > Payments*

Team Work

General Improvements and Corrections

Active/Inactive Reporting Options

With this release, Team Work reports will have an option to filter results based on employee status. You can simply choose from the dropdown to include Active, Inactive, or All employees. The default for the Employee Status field is 'Active'.

The screenshot shows the 'Reports' section of the Team Work interface. It includes several report buttons: Employee List, Training Record, Training Certificate, Training Events, Training Progress (highlighted in pink), and Expiring Certifications. Below these are filters for Area, Site Code, Site, Academic Year (2019 - 2020), and CEU Requirement Level. The 'Report Options' section contains checkboxes for 'Group by: CEU Requirement Level' and 'Filter by: Show Hours Below Requirement only'. The 'Employee Status' dropdown menu is open, showing options: Active (selected), --ALL--, Active, and Inactive. A 'Show Me!' button is located at the bottom right of the report options area.

When including Inactive employees in your report, an asterisk will appear by their names as a helpful indicator.

Training Progress Generated 01/06/2020 02:50:26 PM by Jordan Claros - PrimeroEdge

Site: All

ID	Name	Job Title	Site Name	Hours			
				Requirement	Completed	Above(Below)	Planned
450735	ALAIRA Deon		251 Wittlich Elementary School	6.00	60.00	54.00	
5556668889	Blue Bonnet	Program Staff	789456 Belper Elementary School	6.00	23.00	17.00	
888998	Betty Boop (*)	Program Staff	789456 Belper Elementary School	6.00	0.00	(6.00)	
51389244	MEGHASHRI Chant (*)	Program Staff	005 Claremont Elementary School	6.00	0.00	(6.00)	
3238080041	Elaine Delacueva	Program Staff	550 Geraldton High School	6.00	0.00	(6.00)	

→ To access: Team Work > Administration > Reports

General Improvements and Corrections

Custom Meal Timings

We corrected the custom meal timings that were being removed when a user clicked Cancel to exit the Site Info page.

→ *To access: System > Sites and Users > Sites > Meal Types*