
MealsOnDisk User Guide

Version 2.40



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Introduction

MealsOnDisk is a software product that has been designed to simplify the administration of meal preparation and distribution. Many kitchens use cards, lists and whiteboards to keep customer and delivery run information. Others use spreadsheets to track some of the information. MealsOnDisk allows you to keep all details about your customers and their meal deliveries in a single database. The information stored currently includes:

- Customer details
- Meal preferences
- Delivery run details including instructions to delivery volunteers
- Customer history including details of all deliveries, charges and payments
- Volunteer details and rosters

When customers are added to MealsOnDisk you tell the system which days they receive meals and what types of meals they want. The system uses this information to determine the meals that need to be prepared and which customers they need to be delivered to.

This user guide provides information on installing, setting up and using MealsOnDisk, regardless of whether you have a licensed copy, or you are just evaluating it.

Flexibility

If a customer doesn't want meals for a period of time, because they are away or in hospital, you can record these details. You can even change the type of meals they want to receive for a particular period, for example if they have special dietary requirements due to an illness or an operation. In all these cases, MealsOnDisk will use the information you have entered to reliably determine the meals that need to be prepared and delivered on any particular day. All reports and lists produced by MealsOnDisk will use this information.

Finances

MealsOnDisk doesn't try to be a computer accounting package. There are a number of well known packages available for a reasonable cost. However, it will track all charges, payments and adjustments for each customer allowing you to transfer summary information to the accounts. MealsOnDisk will also show outstanding balances on the delivery run sheets to assist volunteers in collecting payment from customer who pay in cash. Clients can be charged in arrears, or in advance. Invoice statements can also be produced for those clients not paying in cash.

Reports

MealsOnDisk provides a variety of reports such as details for kitchen staff of all meals to be prepared, labels for meal containers to assist in delivery, delivery instructions for each run, as well as financial summary reports and reports to assist with MDS reporting and HACC subsidy claims. Examples of sample reports are available to be viewed.

Ease of Use

MealsOnDisk has been designed to be simple to use, as staff and volunteers may not necessarily have a high level of computer experience. The software runs under Microsoft Windows so makes use of all the common useability features available to Windows applications. Installation is also straight forward as it installs automatically from the product CD.

MealsOnDisk has been successfully used by meal services throughout Australia since 2004. An evaluation copy of MealsOnDisk can be requested by any meal service so that they can try it for themselves.

System Requirements

MealsOnDisk has been specifically designed to operate on most personal computers that are currently operating in businesses today. That is, it is not necessary to buy a brand new computer to run MealsOnDisk. However, for support, security and reliability it is strongly recommended that the computer is running Windows XP. If you are buying a new computer, a low end computer is more than adequate for MealsOnDisk. However, memory is much more important than processor speed.

The formal system requirements specification is provided below. This applies regardless of whether the computer is running the MealsOnDisk locally or over an office network.

Processor	166 Mhz or higher (also subject to requirements of the operating system)
Operating System	Windows 7 Windows Vista Windows XP Windows 2000 Windows ME Windows 98 Windows 98 Second Edition Windows NT (with SP6a) Windows Server 2003
Memory (minimum)	512 MB for Windows Vista and Windows 7 128 MB for Windows XP 64 MB for Windows 2000 32 MB for other operating systems
Memory (recommended)	1 GB for Windows Vista and Windows 7 256 MB for Windows XP 128 MB for Windows 2000 64 MB for other operating systems
Hard Disk	100 MB of available hard disk space
Drive	CD-ROM or DVD-ROM drive required for installation
Display	VGA or higher-resolution monitor 1024x768 resolution recommended
Other Software	Microsoft Internet Explorer version 5.01 or later. Internet Explorer 6 Service Pack 1 is recommended.

1 Installing and Uninstalling

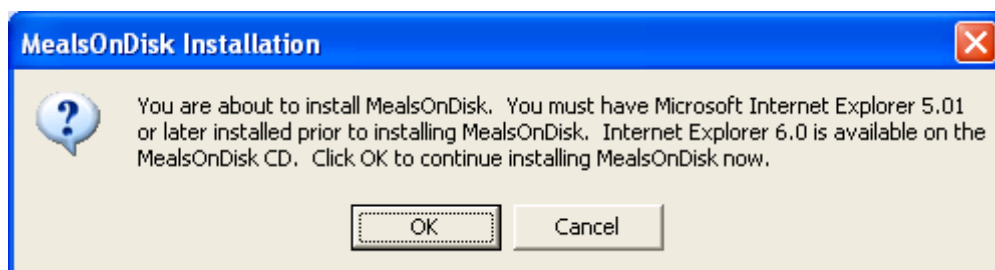
1.1 Installing MealsOnDisk

Before you are able to use MealsOnDisk, you will need to install the application. The installation process should take between 5 and 10 minutes. In order to successfully install MealsOnDisk, you will need to log on as a user who has administrator rights on that computer. Otherwise, you will receive error messages during installation.



The Administrator function is a security feature of recent versions of Windows. If you are using Windows 98 and Windows ME, you will not encounter it.

Installation of the software should start automatically when the CD is placed in the CD drawer of the computer, assuming that the computer's autorun feature has not been disabled. The following message is displayed as the first part of the installation process. If the installation doesn't start automatically, view the CD drive with Windows Explorer, and run the "setup.exe" program from the top level folder.



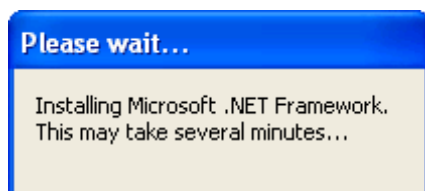
Microsoft Internet Explorer 5.01 (or later) must be installed before MealsOnDisk can be successfully installed. If you need to install or upgrade Internet Explorer, click Cancel to exit the MealsOnDisk installation. If you click OK, the installation will continue.

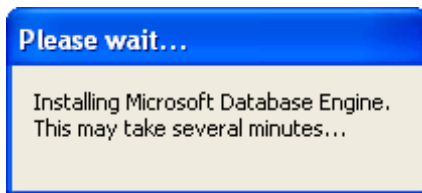
Microsoft Internet Explorer 6.01 is available on the MealsOnDisk CD in the \ie6 folder. Open this folder with Windows Explorer and run "ie6setup.exe" in order to install Internet Explorer 6.01. MealsOnDisk does not access the internet but uses some of the Internet Explorer technologies to operate.

There are two components which will be installed automatically as part of the installation of the MealsOnDisk application:

- Microsoft .NET Framework
- Microsoft Database Engine

The following messages will indicate that these components are being installed. Each component will take a couple of minutes and user input is required.





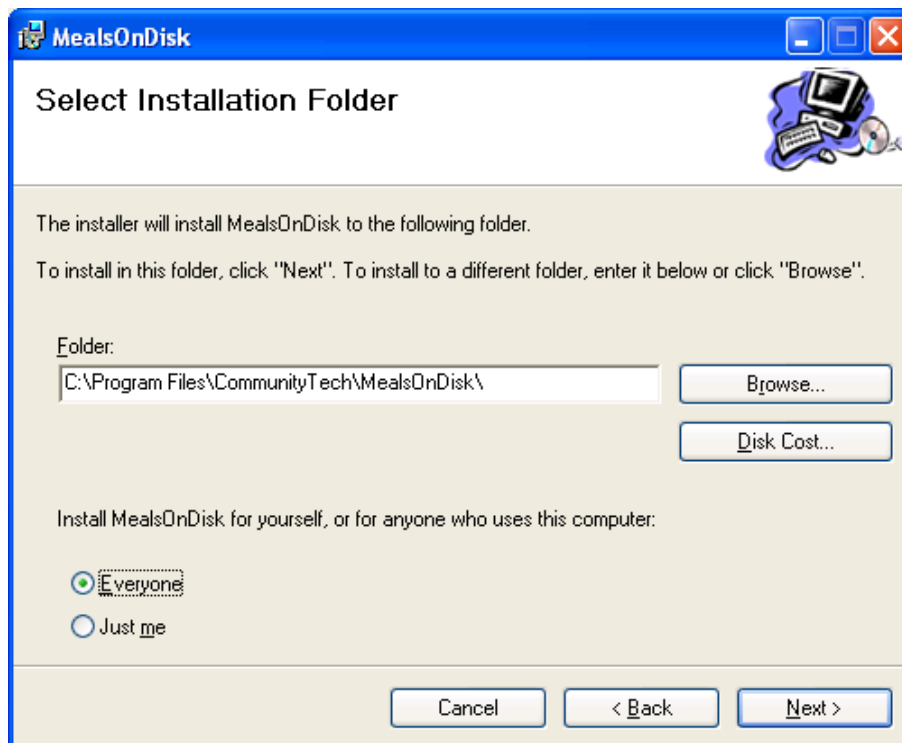
Once the installation of these two components has finished, the following window will be displayed to commence installation of the MealsOnDisk application. Click the Next button to continue.



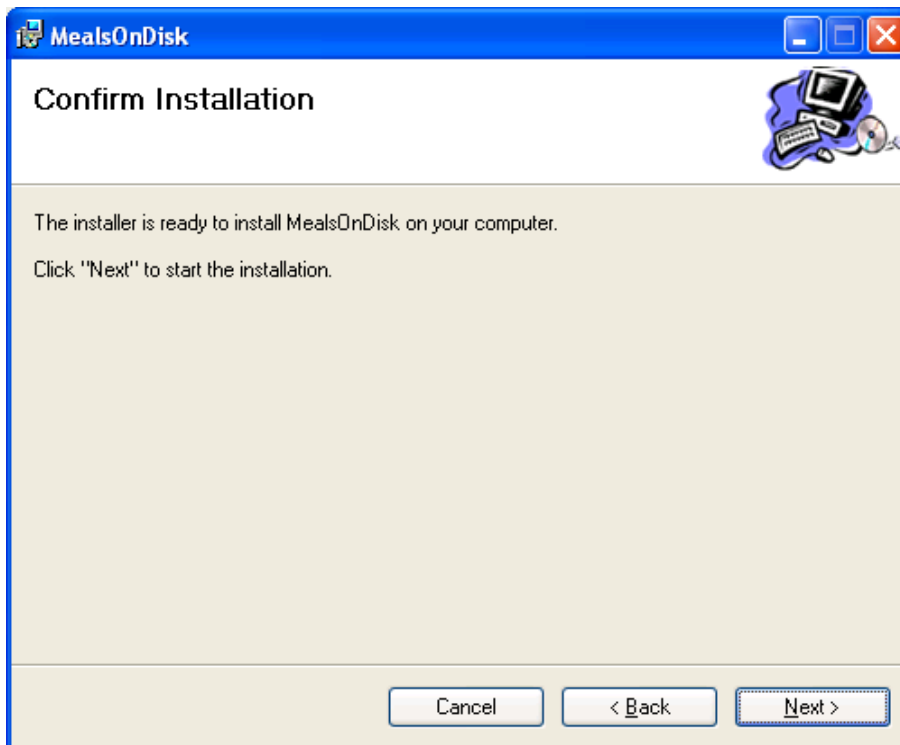
In order to install MealsOnDisk, you must accept the licence agreement. Please read this agreement, and if it is acceptable, click the "I Agree" and then "Next" to continue. The licence agreement can be viewed at any time, by opening the file "Licence.rtf" which is installed in the MealsOnDisk folder. (This folder is selected in the next step)



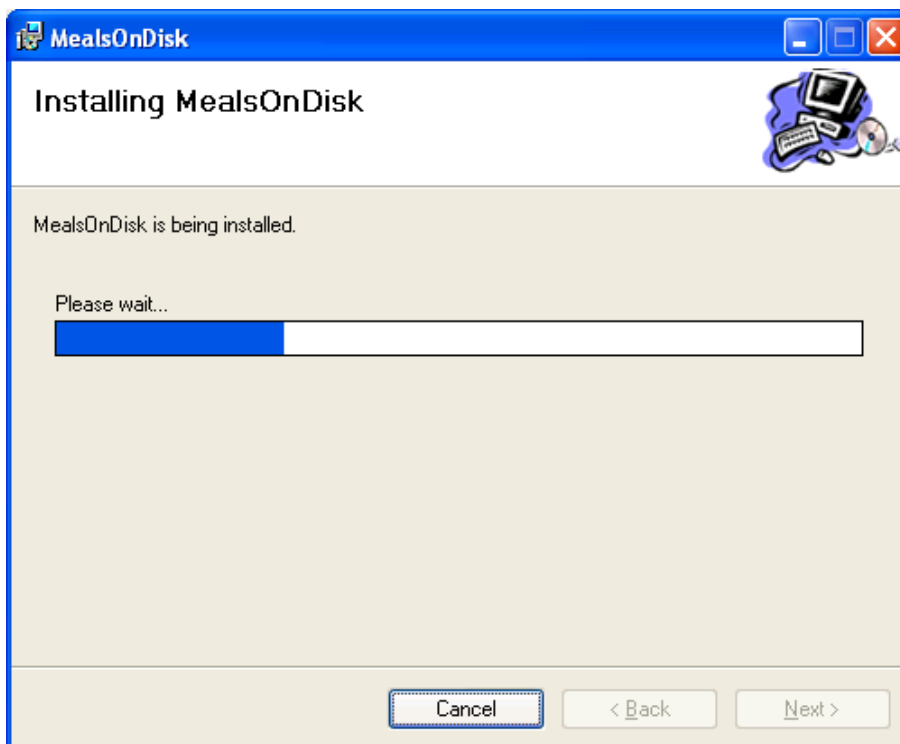
In the next step you can choose the folder in which MealsOnDisk will be installed, and whether you want all users on that computer to be able to use MealsOnDisk. Usually, there will be no reason to change the installation folder from the default. It is recommended that MealsOnDisk is installed for "Everyone", even if there is only one user set up on that computer. Once you have made your selections, click "Next" to continue.



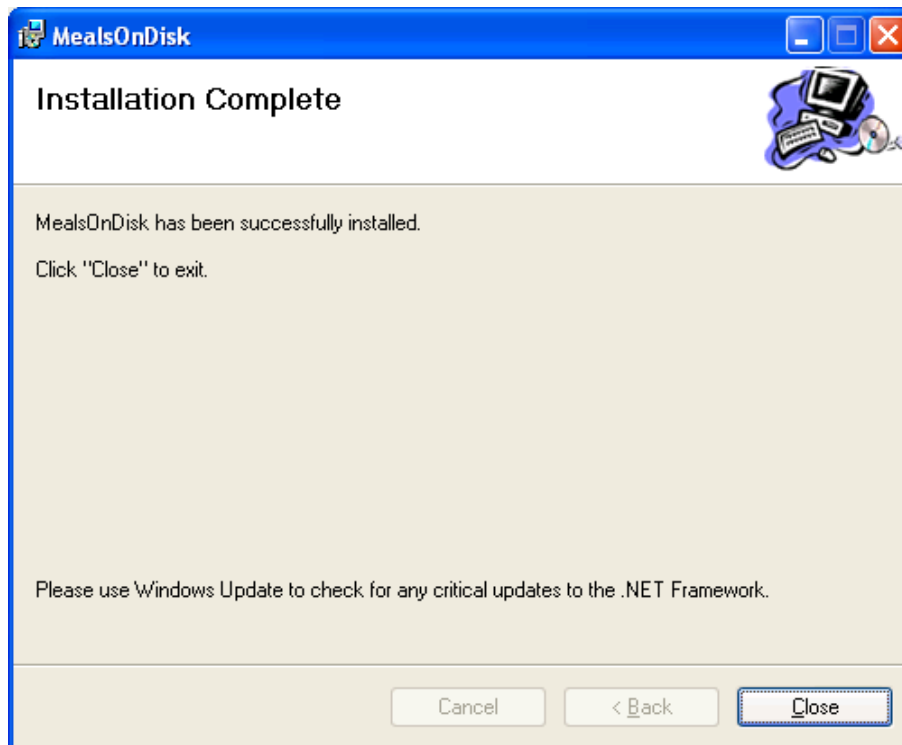
The next window provides a final confirmation before the installation starts. Click “Next” to continue.



The installation will now proceed. It will take about a minute or so. Progress will be indicated along the way.



Once the installation has finished, a final window will be shown. Click “Close” to end the installation process.



For information about using MealsOnDisk, please refer to Section 2- Getting Started below.

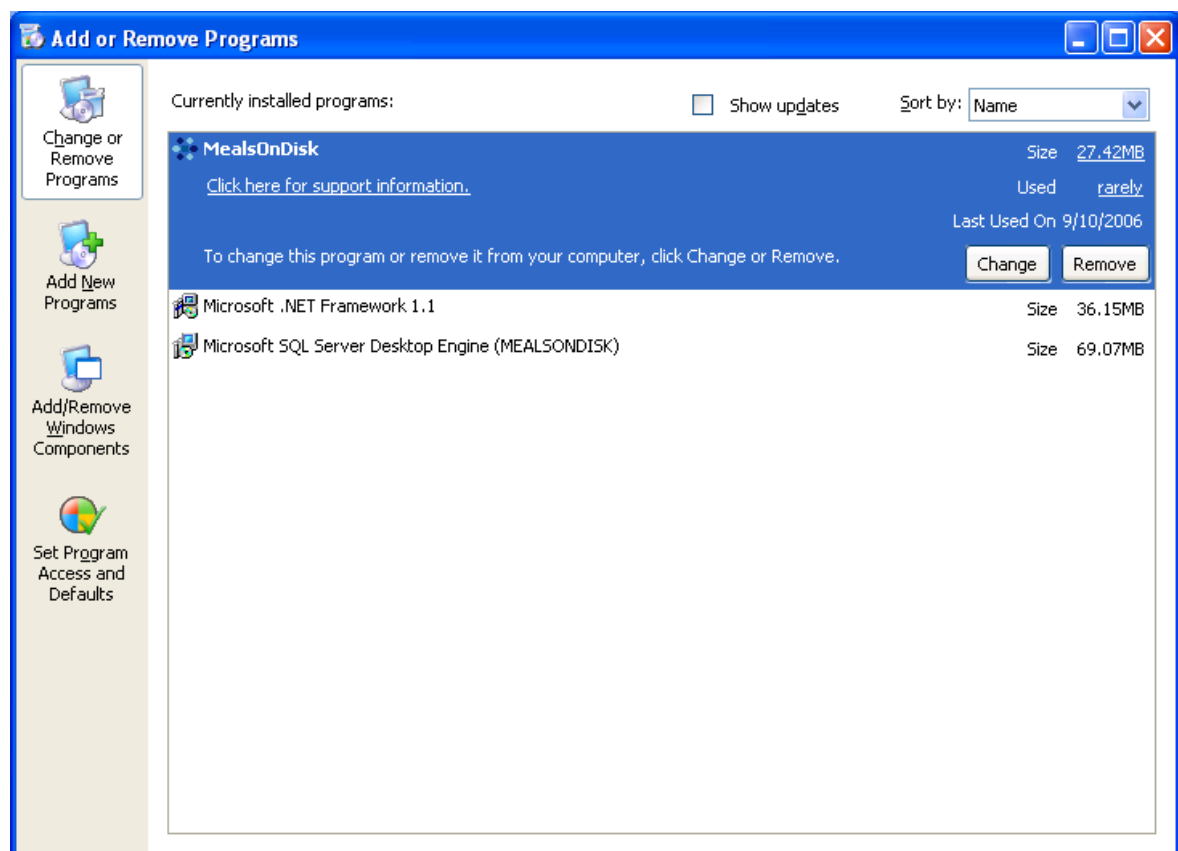
1.2 Uninstalling MealsOnDisk

If you wish to uninstall MealsOnDisk, this is done through the “Add or Remove Programs” in Control Panel. Each of the following three components must be uninstalled in order to remove all software that is part of the MealsOnDisk installation:

- MealsOnDisk
- Microsoft Database Engine
- Microsoft .NET Framework

It is recommended that the components are removed in the order listed above.

A screenshot of the Windows XP Add or Remove Programs window is shown below. Please note that your computer may show many other programs which have been installed. This is taken from a computer that has only had MealsOnDisk and Windows XP installed.



Removing the Microsoft Database Engine will also remove the MealsOnDisk database and all data within it. If you wish to keep this data, please ensure that a backup is made before this component is removed. Section 12.3 describes how to make a backup.

Please note that other applications may also make use of the Microsoft .NET Framework. Please ensure that it is not required before removing it

1.3 Installing an Update

MealsOnDisk updates are made available from time to time, to provide new features and to correct software defects. Updates are announced via email and are available for download from the MealsOnDisk website www.mealsondisk.com.



Updates are available to both licensed users and evaluation users.

Email announcements of updates will include a link to the update page on the web site www.mealsondisk.com/update. This page will show details of the latest update, including details of the changes that have been made. Links are also provided to details of changes made in prior updates.



Please ensure that you exit from MealsOnDisk on all computers beyond downloading and saving the update.

To download the update, click on the link on the update webpage. You will then be prompted to choose a folder where the file will be saved. Select the MealsOnDisk installation folder which is usually

C:\Program Files\CommunityTech\MealsOnDisk

You should be prompted as to whether you want to overwrite the existing file. Choose "Yes". If you are not prompted, you have not saved the file in the correct location.



It is common mistake to save the file to the Desktop. This may appear to work, but may cause problems in the future. Please ensure that the update is saved to the MealsOnDisk installation folder as described above.

When the download has completed, you can run MealsOnDisk from the Start Menu or the desktop icon, as usual. The database will automatically be backed up and then updated the first time the new version is run.

2 Getting Started

It is recommended that you read this section Getting Started and the next section Setup , before entering client details.

2.1 Starting MealsOnDisk

An icon will appear on the desktop and can be double-clicked to start MealsOnDisk once installation is complete. The program can also be opened by clicking on the “Windows Start” button and locating the program under “All Programs”.



The first time you start MealsOnDisk it will create the MealsOnDisk database. You will then be shown a message indicating that MealsOnDisk is operating in evaluation mode. The evaluation period lasts for 60 days. During this time, you will be able to use and access all features except the creation of MDS reports, although all other reports will include a watermark indicating that the product is unregistered. When a decision is made to purchase MealsOnDisk, please contact CommunityTech to be given a Licence Key. Locate “Register” under the “Help” menu item at the top of the screen and enter in the key. See section 13.3 for details about entering a licence key for MealsOnDisk.

If the evaluation period expires before you have registered the product, all information in the database will continue to be accessible but it will not be possible to use any of the reports.

2.2 Navigation

MealsOnDisk is a Windows program that can be used with a keyboard and mouse. Most of the functions are accessed via the menu at the top of the screen, some by clicking buttons on a form and some by both methods. Hovering the cursor over an area of a form will result in brief help information being displayed. In many instances, fields will already have a default entry when you first open the window. Often these defaults will be correct

and will not need to be changed but instructions are included in this user guide for changing the defaults.

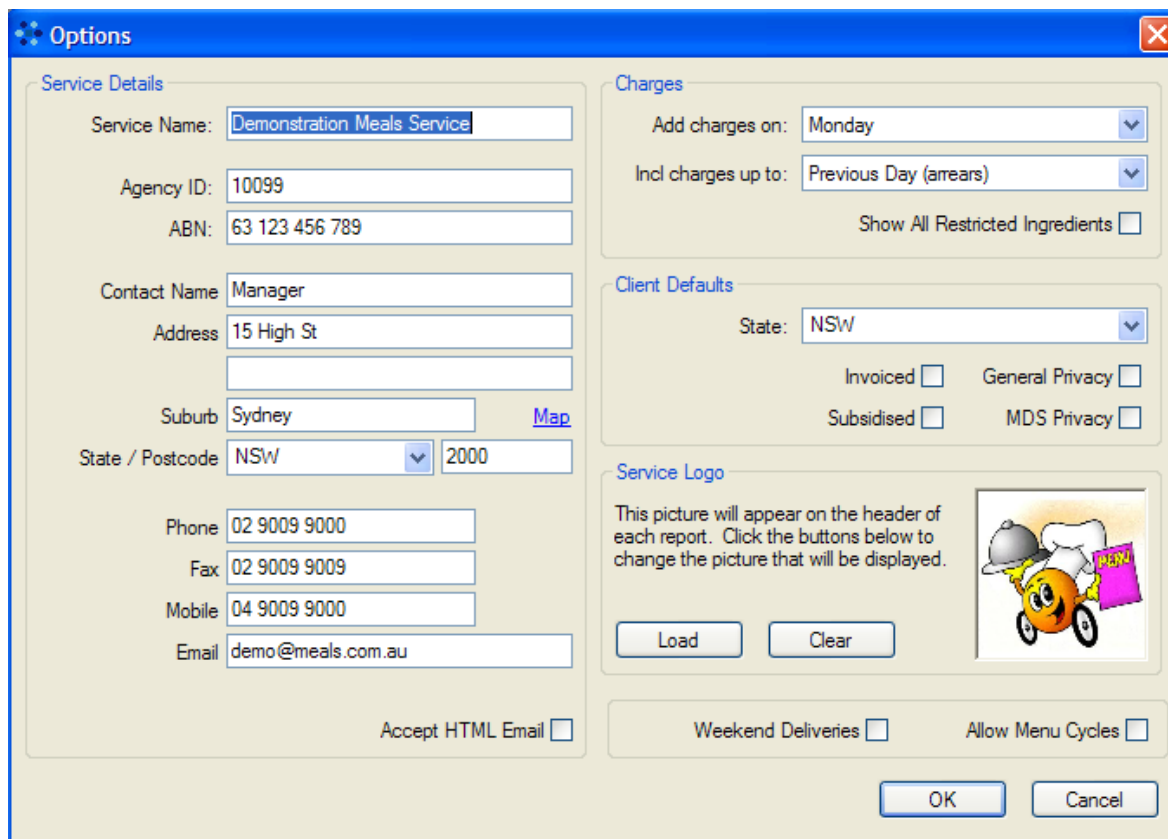
For details about arranging the windows on your screen, see Section 11.

To close the MealsOnDisk program, either click on the X button on the top right of the MealsOnDisk window or locate and click on “File->Exit” on the menu at the top of the screen. You will be prompted to choose to make a backup or not. We recommend that you make a backup at least once a week. If you do choose to make a backup, it should take only a few seconds and the program will then close.

For more information on backups please see Section 12.3.

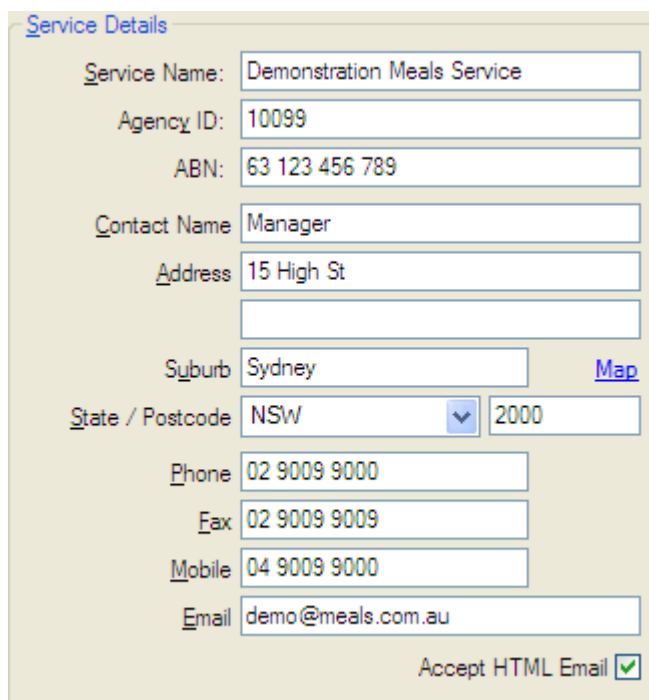
2.3 Options

As part of the Installation process, the options window will be displayed each time MealsOnDisk is started until the Meal Service Name has been entered. The *Options* window can be shown at any time by clicking on “Tools” on the menu at the top of the MealsOnDisk screen, and then on “Options”.



The different sections of the Options window are described below.

2.3.1 Service Details



The screenshot shows the 'Service Details' form. It contains the following fields and values:

- Service Name: Demonstration Meals Service
- Agency ID: 10099
- ABN: 63 123 456 789
- Contact Name: Manager
- Address: 15 High St
- Suburb: Sydney
- State / Postcode: NSW 2000
- Phone: 02 9009 9000
- Fax: 02 9009 9009
- Mobile: 04 9009 9000
- Email: demo@meals.com.au
- Accept HTML Email: ☒

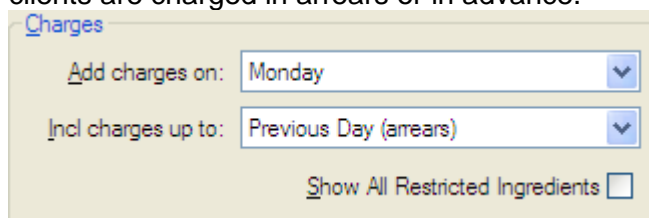
The Service Details section contains information that identifies your Meals on Wheels service. These include:

- the Meal Service Name, which will be used on the header of most reports
- the Agency ID, a number which has been provided by HACC for use in MDS reporting
- other contact details that are included in MDS Reports.

ABN details are currently not used, but may be used in future versions of MealsOnDisk.

2.3.2 Charges

The purpose of this section is to nominate when charges will become due and whether clients are charged in arrears or in advance.



The screenshot shows the 'Charges' form. It contains the following fields and values:

- Add charges on: Monday
- Incl charges up to: Previous Day (arrears)
- Show All Restricted Ingredients: ☐

Choose the day of the week (from a drop-down menu) on which you would like payment to be due. Payments due will be included on the Delivery List for volunteers to collect on that day of the week.

It is also possible to choose from the *Include charges up to* drop-down list whether clients are charged in arrears or in advance. For example, if you are a service which delivers Monday to Friday and you have chosen Monday as the day on which charges are added to the *Delivery List*, you may now choose whether the billing period will end on:

- Previous day (in this case Friday of the previous week)
- Same day (in this case Monday)
- Previous day next week (in this case the coming Friday)

- Same day next week (in this case Monday next week)

If you have chosen Friday as the day on which charges are added to the *Delivery List*, you may now choose whether the billing period will end on:

- Previous day (in this case Thursday)
- Same day (in this case Friday)
- Previous day next week (in this case Thursday next week)
- Same day next week (in this case Friday next week)

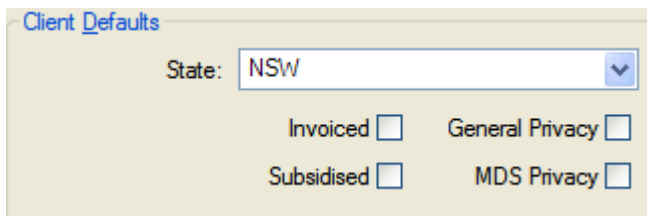
When meal deliveries are processed, a description of the meal to be provided is produced and saved in the MealsOnDisk database. It is later used in reports, such as the Kitchen List reports, and is also displayed in the client's Account History and Delivery History (see Section 4.6). The description includes a list of meal items to be delivered, any requested meal preparations, and any restricted ingredients. Restricted ingredients will only be included if the ingredient is used in a meal item requested by the client, on that particular delivery day (see Section 5 for further explanation on Delivery Ingredients). However, a list of all restricted ingredients can be shown if required. Click the **Show All Requested Ingredients** check box to enable this option. The option will take effect on all subsequent processing of meal deliveries.



These details are only relevant for cash clients. If a client is invoiced, the choices made here will not impact them.

2.3.3 Client Defaults

The client defaults will make it easier to enter new client details. The options chosen here will be specified by default for each new client, which should save you time when adding new clients. See Section 4.2



The screenshot shows a window titled "Client Defaults". It contains a "State:" label followed by a drop-down menu currently showing "NSW". Below this are four checkboxes: "Invoiced", "General Privacy", "Subsidised", and "MDS Privacy", all of which are currently unchecked.

Choose your state from the drop-down menu and it will appear by default in the address for each new client.

Check the **Invoiced** box if other agencies or persons other than the clients are invoiced for the meals your service delivers.

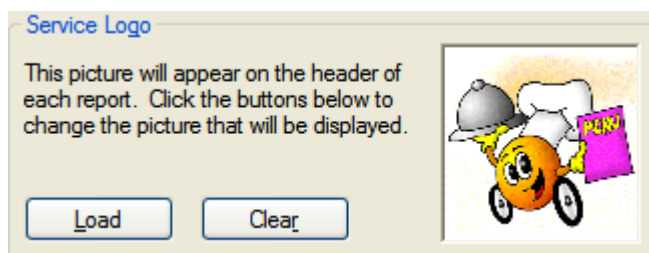
If most of your clients qualify for subsidy from HACC, check the **Subsidised** button.

Check the **General Privacy** button if most of your clients have expressed a desire not to provide personal details to any other person or agency.

Check the **MDS Privacy** button if most of your clients have expressed a desire not to provide personal details in MDS reports.

The defaults can be altered for individual clients on their *Client Details* windows. See Section 4.2

2.3.4 Service Logo



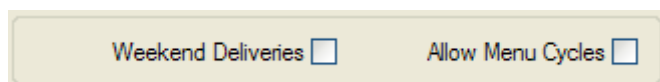
If you wish, you can have a photo or logo appear at the top of all your reports. You may choose any picture that it stored on your computer. When you click on the “Load” button, the Select Picture dialog box will appear that let’s you choose any picture on your computer. This is the same dialog box that appears when selecting a Client Picture. See Section 4.3 for more details on selecting pictures.



If you want to use a picture from the internet, you will need to save it to your disk before loading it in to MealsOnDisk.

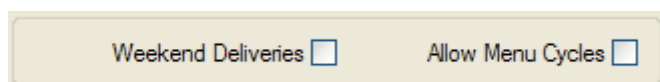
If you are using MealsOnDisk on more than one computer, there is no need to have the photos stored on each computer as all photos are stored in the database.

2.3.5 Weekend Deliveries



By default, MealsOnDisk will only process meal deliveries for weekdays eg Monday to Friday. You will notice that the Meal Preferences on the Client window (see Section 4.4) only allow preferences to be entered for weekdays. However, if a service delivers on weekends you can enable weekend deliveries on the Options windows. Once the setting is enabled, the client meal preferences will allow preferences to be set for each day of the week - Monday to Sunday.

2.3.6 Menu Cycles



MealsOnDisk currently only allows you to record meal preferences for one week. Many services are now offering clients more choice through a multi-week rotating menu cycle. A future version of MealsOnDisk may provide support for multi-week menus; however there is currently a way to allow weekly meal preferences to be saved and loaded. The feature is called Menu Cycles, and it allows you to save the current set of weekly preferences, and to reload a previously saved set of preferences. More details are provided in Section 9.

If you want to make use of the Menu Cycle feature, you should select the Allow Menu Cycles checkbox.

3 Setup

We strongly recommend that your first task after installation is to set up some basic information about meal items and delivery runs. If you enter client details first, you will be choosing client preferences from a default list that may not suit the way your service operates, potentially creating more work in the long run.



It's especially important to set up Delivery Runs and Meal Items at this point. If you don't wish to complete the entire set-up procedure at this stage, the rest of the configuration can be done at another time

To customize the set-up options, click on "Tools" on the menu at the top of the screen, hover over "Setup" and sub-menu appear.

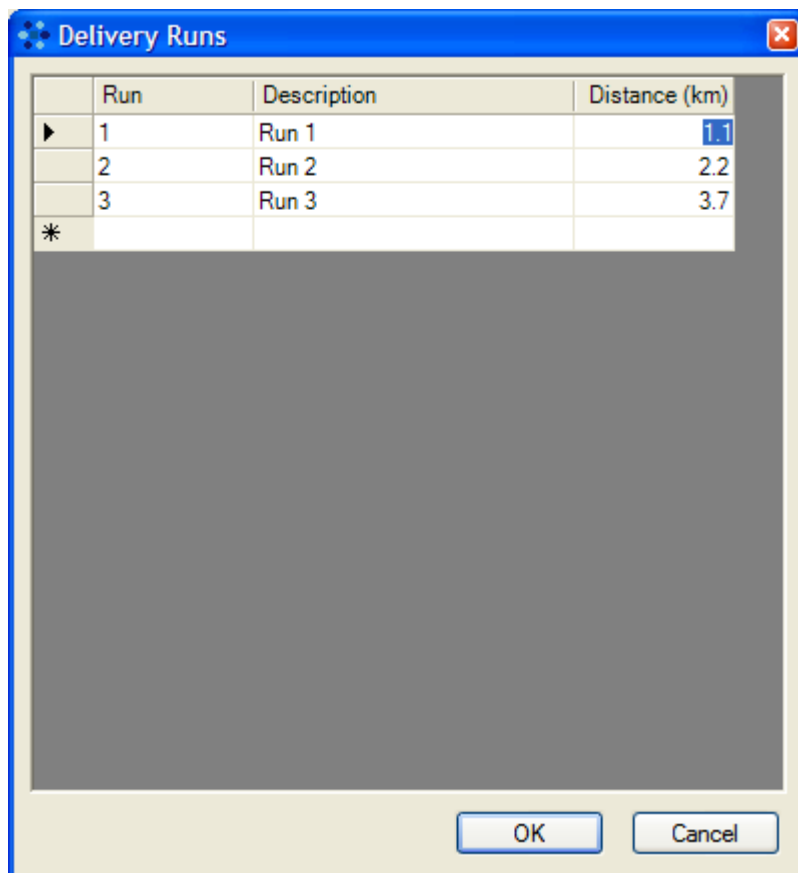


Each of these represents a different Setup category.

3.1 Delivery Runs

There will be 3 runs already listed when MealsOnDisk is installed. You may rename these runs using letters, numbers or a combination of these, and you may add or remove runs. To add a run, click on the asterisk at the bottom left of the table and fill in the cells, using

the Tab key or the right-arrow key to move across. To remove a run, all clients must first be removed from the run and placed on another run.



Run	Description	Distance (km)
1	Run 1	1.1
2	Run 2	2.2
3	Run 3	3.7
*		



Please note that the Delivery Run ID can be only two characters. Delivery Runs will always be sorted alphabetically on the screen and in reports. Therefore, if your Delivery Runs are numbered, and there are more than 9, you will need to call them "01", "02", "03" ... "10", "11", "12" etc, in order for them to appear in the correct order.

You may find it useful to include the run length in this table if you wish to make payments to volunteers based on a rate per kilometre travelled but it is not necessary to the operation of the program. Please see Section 8.2 for more information on Volunteer Payments.

When you have finished with the *Delivery Runs* window, click on OK.



Any of these options can be reconfigured at any time, using the same procedure.

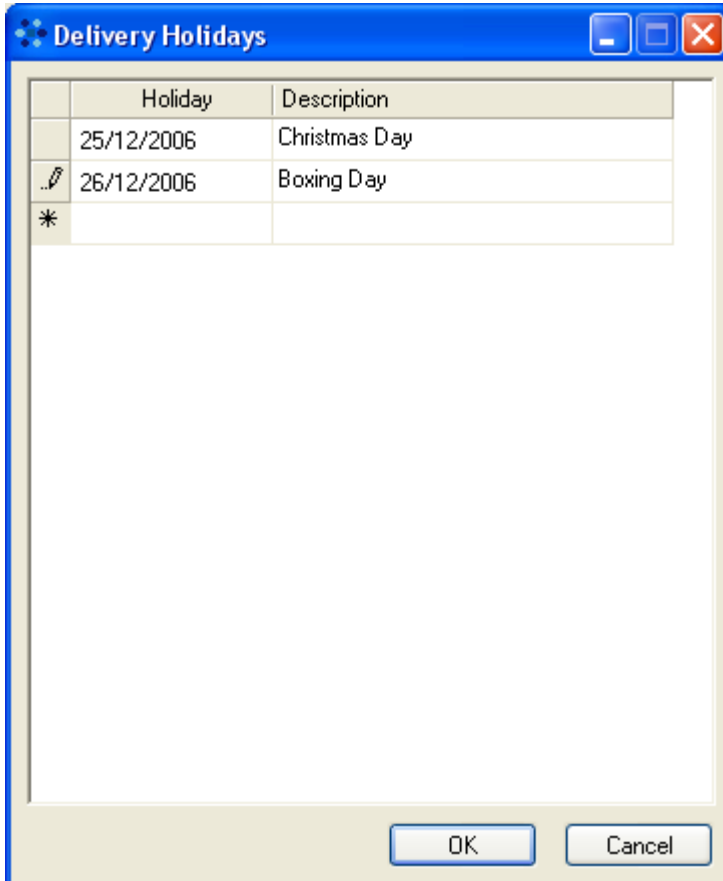
3.2 Delivery Holidays


It is possible to enter here the dates and names of individual days of the year when your service will not be operating. Note that this does not include weekends or regular days of the week when deliveries do not take place, for example a service which delivers only on Monday and Friday would not need to type in the dates of every Tuesday, Wednesday and Thursday of the year.



Set up of Delivery Holidays is particularly important when clients are charged in advance. If clients are charged in advance, MealsOnDisk will estimate future deliveries and charges when deliveries are processed. However, it will not include days which have been specified here as Delivery Holidays.\

There are no holidays included by default when MealsOnDisk is installed. Add information using the steps described above for adding Delivery Runs.




	Holiday	Description
	25/12/2006	Christmas Day
	26/12/2006	Boxing Day
*		

When you have finished with the *Delivery Holidays* window, click on OK.

3.3 Meal Items

Ten meal items are included by default when MealsOnDisk is installed. As for Delivery Runs and Delivery Holidays, you may add, remove or rename according to the choices your service offers to its clients.

The following screen shots show two quite different configurations.



	Item Name	Singular Description	Plural Description	Normal	Label	Subsidy Price	Full Price	Nr Meals
▶	Meal	Meal	Meals	1	<input checked="" type="checkbox"/>	\$5.00	\$6.60	1
	Special	Special	Special	5	<input checked="" type="checkbox"/>	\$5.00	\$6.60	1
	Frozen	Froz	Froz	0	<input type="checkbox"/>	\$5.00	\$6.60	1
	Salad	Salad	Salads	0	<input type="checkbox"/>	\$5.00	\$6.60	1
	Soup	Soup	Soup	1	<input type="checkbox"/>	\$0.00	\$0.00	0
	Desert	Dessert	Desserts	1	<input type="checkbox"/>	\$0.00	\$0.00	0
	Diabetic	SpecD	SpecD	0	<input type="checkbox"/>	\$0.00	\$0.00	0
	Fruit	Fruit	Fruit	0	<input type="checkbox"/>	\$0.00	\$0.00	0
	Orange Juice	OJ	OJ	1	<input type="checkbox"/>	\$0.00	\$0.00	0
	Apple Juice	Apple J	Apple J	0	<input type="checkbox"/>	\$0.00	\$0.00	0
*								

OK Cancel



	Item Name	Singular Description	Plural Description	Normal	Label	Subsidy Price	Full Price	Nr Meals
▶	Meal	Hot Meal	Hot Meals	1	<input checked="" type="checkbox"/>	\$6.00	\$7.90	1
	Spec Meal	Special Meal	Special Meals	0	<input checked="" type="checkbox"/>	\$6.00	\$7.90	1
	Cold Meal	Cold Meal	Cold Meals	0	<input checked="" type="checkbox"/>	\$6.00	\$7.90	1
	Froz Meal	Frozen Meal	Frozen Meals	0	<input checked="" type="checkbox"/>	\$6.00	\$7.90	1
	Soup	Hot Soup	Hot Soups	1	<input type="checkbox"/>	\$0.00	\$0.00	0
	Froz Soup	Frozen Soup	Frozen Soups	0	<input checked="" type="checkbox"/>	\$0.00	\$0.00	0
	Dessert	Dessert	Desserts	1	<input checked="" type="checkbox"/>	\$0.00	\$0.00	0
	Spec Dessert	Special Dessert	Special Desserts	0	<input checked="" type="checkbox"/>	\$0.00	\$0.00	0
	Extra Dessert	Extra Dessert	Extra Desserts	0	<input checked="" type="checkbox"/>	\$0.00	\$0.00	0
	OJ	Orange Juice	Orange Juices	1	<input type="checkbox"/>	\$0.00	\$0.00	0
	Apple	Apple Juice	Apple Juices	0	<input checked="" type="checkbox"/>	\$0.00	\$0.00	0
	No Main	No Main Meal	No Main Meal	0	<input type="checkbox"/>	\$6.00	\$7.90	1
	Pick Up	Pick Up	Pick Ups	0	<input checked="" type="checkbox"/>	\$6.00	\$7.90	1
	Fruit	Fruit	Fruit	0	<input type="checkbox"/>	\$0.00	\$0.00	0
	Vegetables	Vegetables	Vegetables	0	<input checked="" type="checkbox"/>	\$0.00	\$0.00	0

OK Cancel

Singular and plural descriptions are included for the sake of having labels and delivery reports which demonstrate good use of the English language! For example, 1 Meal or 2 Meals. Descriptions are recorded on the client's Delivery History, and on Delivery Run reports, and Meal Labels.

If a majority of clients using your service receive a delivery which includes the same items, for example a hot meal, a soup, a dessert and an orange juice, you can choose these items under the column headed "Normal" and this will become the default meal for each client, as you will see when you enter client details. Of course, an individual's usual meal can also be customized. See Section 4.4 for details.



If you reconfigure the “Normal” column, it will include the new configuration for new clients you add after that point in time. Existing clients will keep their usual preferences on their profile. See Section 4 for more information on client profiles

Check the boxes pertaining to any meal items for which you would like to print out a label to affix to the packaging.

The next columns are where you enter the prices charged for each meal item, with and without a subsidy. These columns allow you to enter a different price for each meal item. If your service charges a flat rate for a delivery (which may consist of a number of meal items, for example a soup, hot meal, dessert and a juice), you may like to enter the flat rate next to one of the meal items and leave the other items at \$0.00.

The information entered in the Number of Meals column is used in MDS reporting. The MDS report needs to include the number of meals served but not necessarily the components of the entire delivery. A hot meal, a frozen meal or a salad would probably count as a meal for MDS purposes but a dessert or a juice probably would not. If unsure, you should contact your HACCC representative. If you want the meal item to be counted as a meal in the MDS report, enter 1, otherwise enter 0.

When you have finished with the *Meal Items* window, click on OK.

3.4 Meal Ingredients

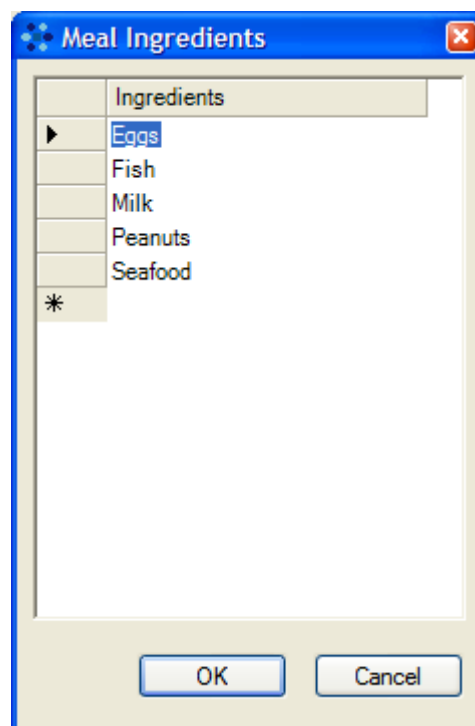
The *Meal Ingredients* window lists by default some ingredients which typically cause allergic reactions in some people.

As with the previous windows, you can add to and delete from this list. You might like to include ingredients which people do not want to be served out of choice rather than necessity.

When you enter the details of each new client, there will be an opportunity to include any restrictions to his/her diet. See Section 4.4.

After the set-up has been completed and the program is operating on a day-to-day basis, it will be necessary to enter each day's meal ingredients in the *Delivery Ingredients* window (see Section 5). Then, when a Kitchen Report (see Section 10.1) is printed, it will include a list of client and ingredient incompatibilities so that the kitchen staff can address any problems. This information will also appear on Delivery Reports and labels (where that option has been utilised). This ensures that meals which have been specially prepared are given to the correct clients.

When you have finished with the *Meal Ingredients* window, click on OK.



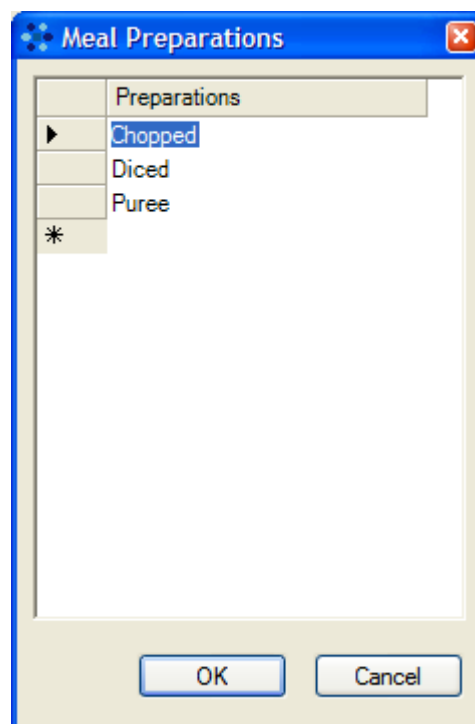
3.5 Meal Preparations

Some of your clients may require their meals to be prepared in a certain way, for example chopped, diced or pureed. When you enter the details of each new client, there will be an opportunity to include any restrictions to his/her diet. See Section 4.4.

There are no default options listed, so create your own list depending on what your clients require. This information will appear on Kitchen and Delivery Reports as explained above for Meal Ingredients.

Meal Preparations are shown on the client window, and on reports in the order in which they are displayed in this window. If you wish to change the order, you can click the grey row header on one of the rows of the table and drag it to its new position.

When you have finished with the *Meal Preparations* window, click on OK.



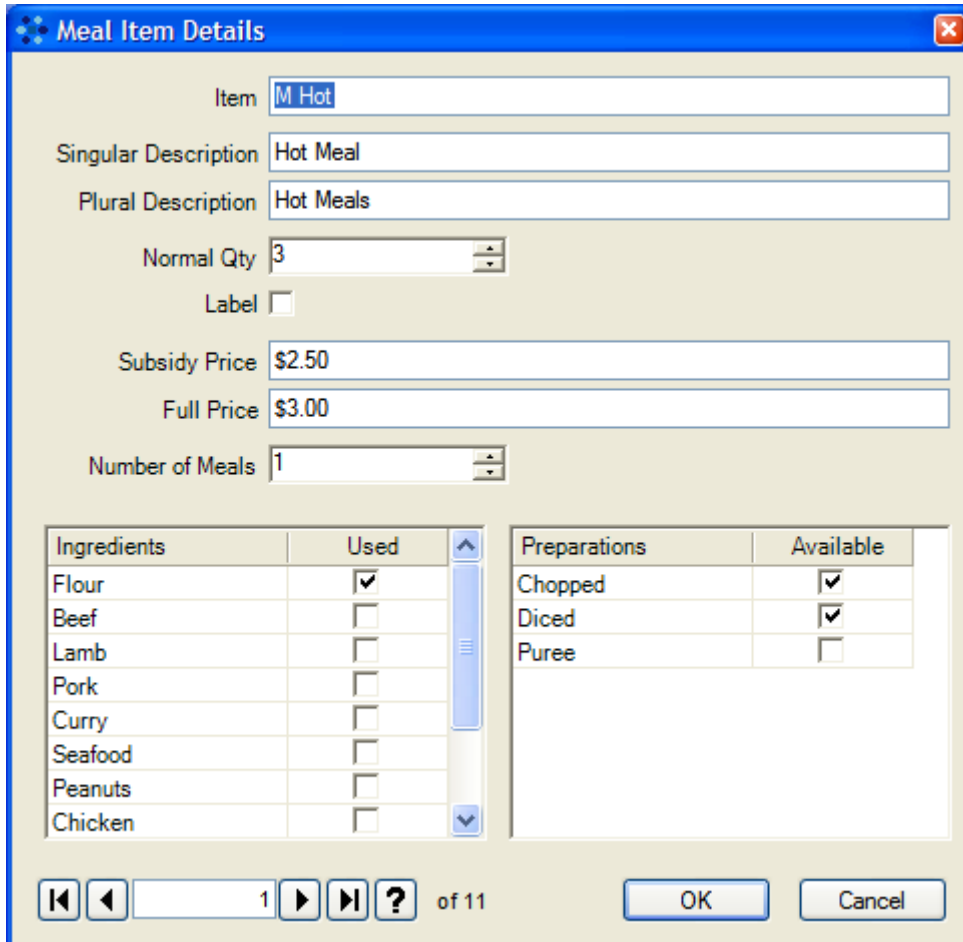
3.6 Meal Item Details

The information in this window expands upon the information in the *Meal Items* window. The difference is that this window also contains details on restricted ingredients and special preparations as well as the details of the Meal Item itself.

When you open *Meal Item Details*, it will show the first Meal Item that is listed in the *Meal Items* window. You can step through the other Meal Items by using the arrow buttons on the navigation bar at the bottom of the window. Unlike the *Meal Items* window, each Meal Item will be displayed separately.

Information you entered in the *Meal Items* window will appear in the *Meal Item Details* window and vice-versa. If you have already entered the necessary details in the *Meal Items* window, then the top section of each screen under *Meal Item Details* will already be filled in.

Each of the Ingredients and Preparations listed in the *Meal Ingredients* and *Meal Preparations* windows will appear in the *Meal Item Details* window. The tick boxes indicate which ingredients are usually included in that particular Meal Item, and which Preparations are available for that particular Meal Item.



The **Meal Item Details** window is used to configure meal items. It includes fields for Item, Singular Description, Plural Description, Normal Qty, Label, Subsidy Price, Full Price, and Number of Meals. It also features two tables: **Ingredients** and **Preparations**.

Ingredients	Used
Flour	<input checked="" type="checkbox"/>
Beef	<input type="checkbox"/>
Lamb	<input type="checkbox"/>
Pork	<input type="checkbox"/>
Curry	<input type="checkbox"/>
Seafood	<input type="checkbox"/>
Peanuts	<input type="checkbox"/>
Chicken	<input type="checkbox"/>

Preparations	Available
Chopped	<input checked="" type="checkbox"/>
Diced	<input checked="" type="checkbox"/>
Puree	<input type="checkbox"/>

At the bottom, there are navigation buttons (back, forward, search, etc.) and a status bar showing '1 of 11' items.

In the example shown above, the Hot Meal usually includes Flour as one of the ingredients, and it is available Chopped or Diced if requested by the client. On the other hand, Orange Juice would probably not have any preparations available as it does not make sense to chop, dice or puree orange juice.

The information about which ingredients are usually used in the various Meal Items can be used to simplify recording the ingredients used on a particular day on the *Delivery Ingredients* window (see Section 5).

When Kitchen Reports and Delivery Reports are run (see Sections 10.1 and 10.2), any restricted ingredients and special preparations will be indicated in the meal description and on delivery labels to ensure that the clients with special considerations receive the correct meals.

When you have finished with the *Meal Item Details* window, click on OK to save the changes you have made.

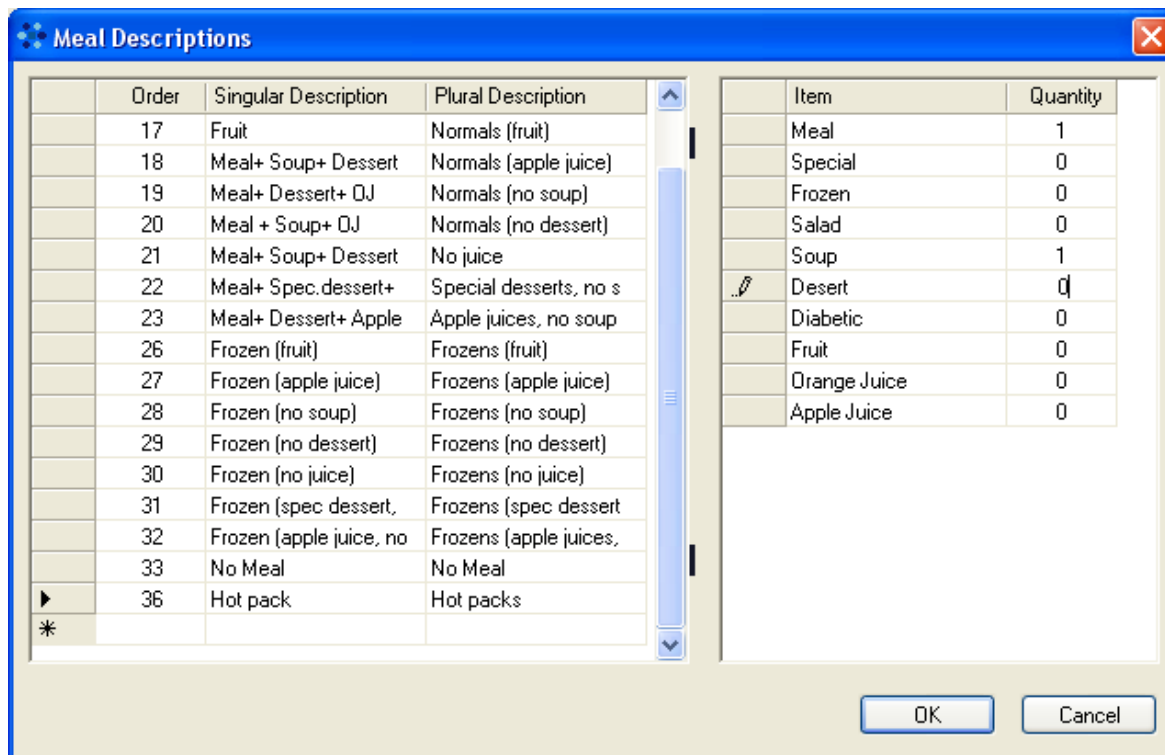
3.7 Meal Descriptions

This function will be most useful for Meals on Wheels Services which have a variety of “packages” – combinations of meal items which are delivered to enough clients to make it worthwhile grouping them together as packages and naming them. For example, a lot of your clients may order a hot meal, soup, dessert and orange juice package so you may refer to this as a “Normal Meal”. Perhaps you refer to a hot meal and soup package as a “Hot Pack” or a frozen meal plus dessert and juice as a “Cold Pack”. The combinations and their titles are up to you.

Open the *Meal Descriptions* window. No defaults will appear so click on the top left hand field and use the tab key or right arrow key to move across and fill in each field.

As described earlier, the singular and plural descriptions are included so that Delivery Reports and labels are grammatically correct.

Once you have completed a row on the left hand table, click on the right hand table and a default list of whatever you have previously entered in the *Meal Items* window will appear. Enter in the quantity of each meal item which you would like to be included in the package, for example the “Normal Meal” described above would have a 1 next to hot meal, soup, dessert and juice and a 0 next to every other meal item. Click on OK and then you may move on to create another “package” if you desire.



Order	Singular Description	Plural Description
17	Fruit	Normals (fruit)
18	Meal+ Soup+ Dessert	Normals (apple juice)
19	Meal+ Dessert+ OJ	Normals (no soup)
20	Meal + Soup+ OJ	Normals (no dessert)
21	Meal+ Soup+ Dessert	No juice
22	Meal+ Spec.dessert+	Special desserts, no s
23	Meal+ Dessert+ Apple	Apple juices, no soup
26	Frozen (fruit)	Frozens (fruit)
27	Frozen (apple juice)	Frozens (apple juice)
28	Frozen (no soup)	Frozens (no soup)
29	Frozen (no dessert)	Frozens (no dessert)
30	Frozen (no juice)	Frozens (no juice)
31	Frozen (spec dessert,	Frozens (spec dessert
32	Frozen (apple juice, no	Frozens (apple juices,
33	No Meal	No Meal
36	Hot pack	Hot packs

Item	Quantity
Meal	1
Special	0
Frozen	0
Salad	0
Soup	1
Desert	0
Diabetic	0
Fruit	0
Orange Juice	0
Apple Juice	0

When you run Kitchen Reports and Delivery Reports (see Sections 9.1 and 9.2), the MealsOnDisk program will search for any combination of meal items which you have named as a package and will name and label the package with the name you have given it.

When you have finished with the *Meal Descriptions* window, click on OK to save the changes you have made.

3.8 Volunteer Duties

This window exists to record rates of payment which volunteers may receive to cover their petrol or other out-of-pocket costs. Many meal services will not need to use this function. If nothing is recorded here, it will not affect the working of the program or the running of any Volunteer Reports.

Open the *Volunteer Duties* window and a default list of typical volunteer duties will appear – driver, non-driver, kitchen, office. You may add to or delete from this list as described above. You may enter a flat rate to be paid to volunteers **and /or** a rate per kilometre.



Duty	Amount	Rate (per km)
▶ Driver	\$5.00	\$1.00
Non-Driver	\$5.00	\$0.00
Kitchen	\$0.00	\$0.00
Office	\$10.00	\$0.00
*		

If you wish to create *Volunteer Payment* reports (see Sections 10.5.6 and 10.5.7), the rates entered here are combined with the run length distances entered in the *Delivery Runs* window (see Section 3.1) to calculate the amount due to the volunteers. It will be necessary to process Volunteer Payments before these reports can be created (see Section 8.3).

When you have finished with the *Volunteer Duties* window, click on OK to save the changes you have made.

4 Client Details

You are now ready to add client details. This is the main data entry window in MealsOnDisk. It allows you to enter client contact information, meal preferences and restrictions, delivery notes and account deposits. Through the use of buttons on the window, you can also access the following information:

- MDS Details
- Contact Details
- Activity Details
- Account History
- Delivery History
- Delivery Run Order

Client Details - Mrs Nancy Locke

Client

Start Date ☒ 27/06/2002

End Date

Title Gender

First Name

Preferred Name

Last Name

Address

Suburb [Map](#)

State / Postcode

Phone Silent ☐

Date of Birth Estimated ☐

Delivery Instructions

Alternate Delivery

Notes

Invoiced ☐ General Privacy ☐

Subsidised ☒ MDS Privacy ☐

Preferences

Item	Usual	<input checked="" type="checkbox"/> M	<input checked="" type="checkbox"/> Tu	<input type="checkbox"/> W	<input checked="" type="checkbox"/> Th	<input checked="" type="checkbox"/> F
Meal	1	1	1	0	1	1
Special	0	0	0	0	0	0
Frozen	0	0	1	0	0	0
Salad	0	0	0	0	0	0
Soup	1	1	2	0	1	1
Dessert	1	1	2	0	1	1
Diabetic	0	0	0	0	0	0
Fruit	0	0	0	0	0	0
Orange Juice	1	1	2	0	1	1
Apple Juice	0	0	0	0	0	0

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Order [Run Order](#)

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[Delivery](#)

Details

[MDS](#)

[Contacts](#)

[Activity](#)

OK Cancel









4.1 Client Navigation

Once you have entered more than one client, you can move between *Client Details* windows using the navigation bar at the bottom left of each *Client Details* window.

This navigation bar pictured on the right, shows that the *Client Details* window is displaying the 120th of 120 clients stored in the database. The individual

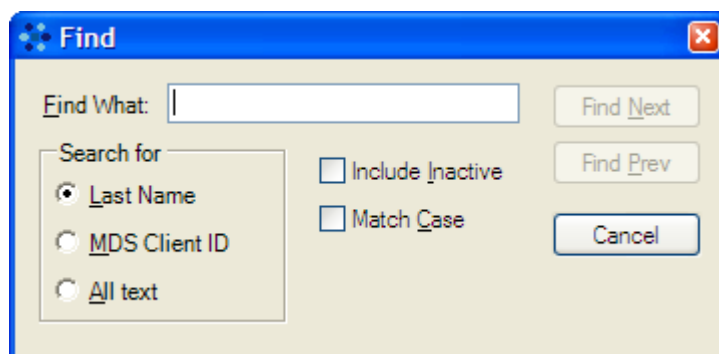


buttons on the navigation bar will perform the following functions:

-  take you to the profile of the **first client** in your database
-  take you to the **previous client** in your database
-  take you to the **next client** in your database
-  take you to the **last client** in your database
-  take you to a blank *Client Details* window so that you can **add a new client**
-  **cancel** any editing you have done to the current client
-  open a **find** dialog box to enable you to search for a particular client by name instead of scrolling through all clients
-  **save** any additions or changes you have made to the client

Clients will be shown in Delivery Run order. So, the first client shown will be the first person in the first Delivery Run. If you click the Next button you will see details for the second client in the first run, etc. Inactive clients aren't on a Delivery Run, and they will be shown after the Active clients. Inactive clients will be in order of how recently they have become inactive, based on the End Date field. The clients who have become inactive most recently will be shown before those who became inactive previously. This ordering of Inactive clients may assist in identifying those who have recently become inactive.

The Find dialog box lets you search for clients. As shown on the right, you can search for the last name of Active clients. By ticking the Include Inactive box you can search through all clients.



By selecting the All Text option you can search for any text on the left hand side of the *Client Details* window, such as First

Name, Street Name, Suburb or Phone Number. By default, Find will match text regardless of whether it is uppercase or lowercase. If you want to match according to whether it is uppercase or lowercase, tick the Match Case box.

If you select the MDS Client ID option, you can search for clients that generate MDS Report errors. Any errors that are returned from your submission of an MDS Report, that are relating to particular clients, will refer to that client with this MDS Client ID, as there are no client names included in MDS Reports. This option allows you to easily find the client, and rectify the error in the information recorded about the client.

Moving to another client will also save any additions or changes, as will clicking on the “OK” button at the bottom of the *Client Details* window. Clicking on the “Cancel” button, however, will not save any changes made to the currently displayed client.

A client cannot be deleted from the database because this would potentially lose historical data which may be needed for MDS and other reporting. If a client is no longer receiving meal deliveries, you may enter an End Date on which deliveries will cease, and while the client’s details will remain in the system, the client will be flagged as “inactive”. The client will therefore not be included in Kitchen or Delivery Reports after the End Date.

The *Client Details* window can also be accessed by clicking the “View” button on the menu at the top of the MealsOnDisk screen and then clicking on “Clients”.

4.2 Creating a New Client

Enter the client’s details on the blank *Client Details* window which appears. The following fields are mandatory:

Title	Address
Gender	Suburb
Last Name	State
	Postcode

Please note that:

You may enter a **Start Date** which is in the future. The MealsOnDisk program will begin to include that client in Kitchen and Delivery Reports on the entered date.

The **End Date** field may be left blank.

Once a **Suburb** or **Postcode** has been entered, it will appear in a drop-down list when you are adding subsequent clients and you may choose it from the list instead of re-typing it each time.

Clicking the **Map** link will display a map of the area around the client's address. The map will be displayed in a web browser and make use of the [Google Maps](#) service. Maps are generally accurate down to the property level right across Australia and they can be displayed as maps or satellite images. To make use of this feature, your computer must be connected to the internet. While this feature makes use of the free mapping service provided by Google, normal internet access charges from your ISP will apply.

State must be selected from the drop-down list.

If you check the **Silent** button next to the client’s phone number, it will not affect the running of the program. This is intended as a visual cue only.

It is required that you enter a **Date of Birth** for each client. If the date of birth is estimated, you should select the **Estimated** checkbox beside the date as this information is required for MDS reporting. You can type the date or select it using the drop-down calendar. You can scroll slowly through months and years using left and right arrows or choose more quickly by clicking on the month and then the year. If a client’s birth date has been entered, a note will appear on the Delivery Report on his/her birthday.

Information you enter in the **Delivery Instructions** and **Alternate Delivery** fields will appear on the Delivery Lists to assist volunteers making deliveries.

The information entered in the **Notes** field will not appear in any reports. The box to the left of the Notes field is for a client picture. Click the box to open the **Client Picture** window. See Section 4.3 below for more details about loading a Client Picture.

Check the **Invoiced** box if another agency or a person other than the client is to be invoiced for the meals your service delivers. The Amount Due on Delivery Lists will always be \$0.00 for these clients because you do not expect to collect cash from them.

There are two sets of prices for Meal Items – Subsidy Price and Full Price – see Section 3.3. The Subsidy Price will be used when your service receives a subsidy for the meal, and Full Price will be used when you are not entitled to a subsidy and need to do a full cost recovery. For example, you will not usually be entitled to a subsidy if you are providing a meal as part of a CACPs package. You will be entitled to claim a subsidy for most of your clients, and in those cases, the **Subsidised** box should be checked, and the client will be charged the Subsidy Prices. If you are not entitled to claim a subsidy for the client, make sure the box is not checked, and the client will be charged Full Prices.

Check the **General Privacy** box if the client has specifically asked to keep their personal details private. You may outline specific privacy requests in the Notes field. MealsOnDisk does not use this field as part of any processing. It is simply provided as a visual indication. For most clients it will not be checked.

Check the **MDS Privacy** box if the client has indicated that they do not want to provide personal details in MDS reports. The MDS Report will usually include a Client Code for each client, which consists of 5 characters derived from the client's name. From this code it may be possible to determine which client the other information relates to, although it may be difficult. If this box is checked, the Client Code is not included in the MDS Report, as specified in the MDS technical documentation. For most clients it will not be checked.

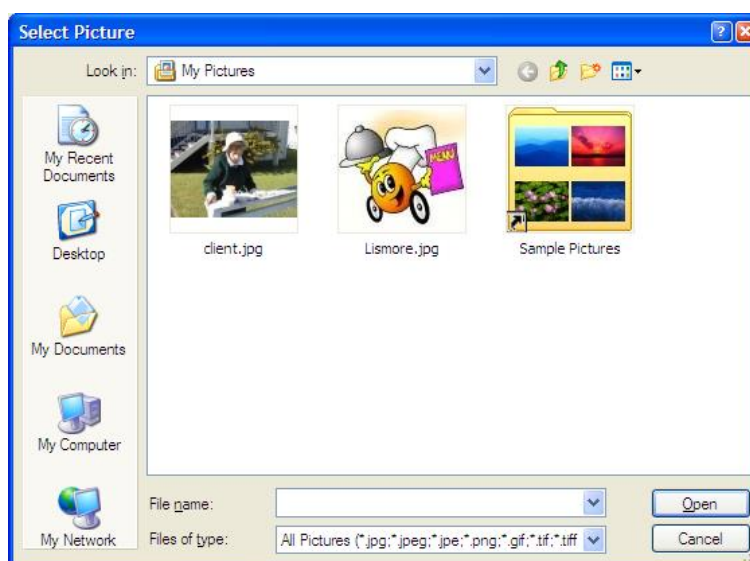
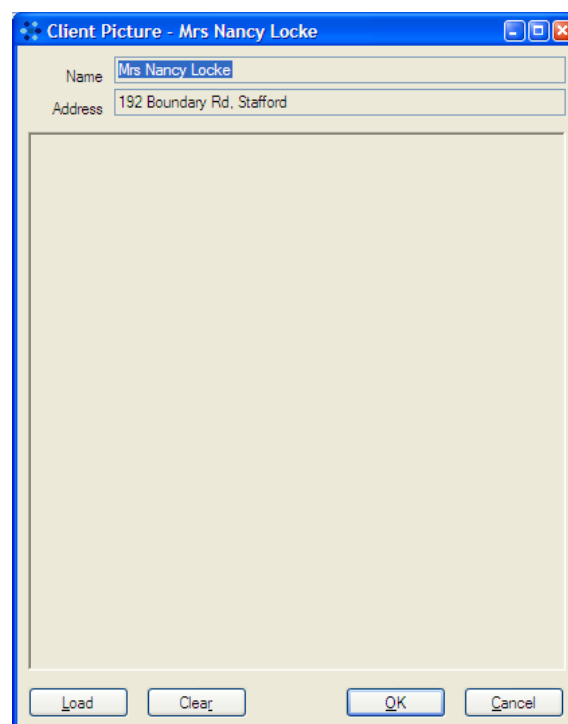
4.3 Client Pictures

The Client Details window has a box just to the left of the Notes field for a client picture. (see Section 4 above) You may want to include pictures of some or all of your clients that you have taken with a digital camera to assist in identifying the client. Another option may be to include a photo of their home to assist with directions.

If a picture hasn't been selected for the client, the box will be empty. If you click on the box it will open the *Client Picture* window.

The *Client Picture* window shows the client's name and address, and a larger view of the client's picture. In the example shown here, a picture hasn't been selected. To select a picture to be displayed for that client you can click on the large box in the middle of the window, or click on the Load button. This will display the Select Picture dialog box allowing you to select a picture for that client.

When the Select Picture dialog box is first displayed it will show the images in your "My Pictures" folder. You can change folders to show images from any folder on your computer. Select an image by clicking on it and then click the Open button to select it.

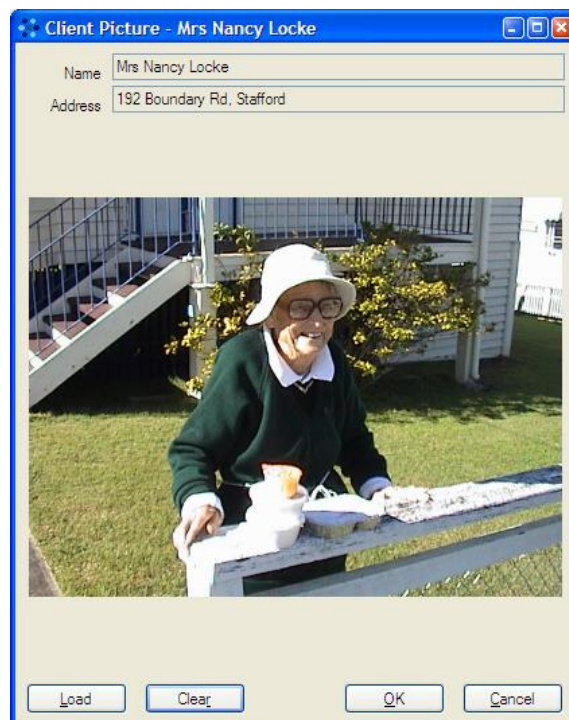


If you are using photos that are on a digital camera, you may be able to select these off the camera directly from the Select Picture dialog box. Digital cameras will often appear as another drive under My Computer. If not, you will have to transfer them from your camera to your computer before you can select them in MealsOnDisk. Refer to the instructions that came with your camera for more information.

Once you have selected an image it will be displayed in the Client Picture window. If you decide you no longer want to have a picture associated with the client, click the "Clear" button and the picture will be removed.

When you have selected the picture you want, click OK to save it. Alternatively, you can click Cancel and the client picture will not change.

After you return to the Client Details window you will notice that a smaller version of the client picture you selected will be shown. (see screen shot below) The client picture will change as you move between clients.



Client Details - Mrs Nancy Locke

Client

Start Date ☒ 27/06/2002

End Date

Title Gender

First Name

Last Name

Address

Suburb [Map](#)

State / Postcode


Phone Silent ☐

Date of Birth Estimated ☐

Delivery Instructions

Alternate Delivery

Notes



Invoiced ☐ General Privacy ☐

Subsidised ☒ MDS Privacy ☐

Preferences

Item	Usual	<input checked="" type="checkbox"/> M	<input checked="" type="checkbox"/> Tu	<input type="checkbox"/> W	<input checked="" type="checkbox"/> Th	<input checked="" type="checkbox"/> F
Meal	1	1	1	0	1	1
Special	0	0	0	0	0	0
Frozen	0	0	1	0	0	0
Salad	0	0	0	0	0	0
Soup	1	1	2	0	1	1
Dessert	1	1	2	0	1	1
Diabetic	0	0	0	0	0	0
Fruit	0	0	0	0	0	0
Orange Juice	1	1	2	0	1	1
Apple Juice	0	0	0	0	0	0

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Delivery Run

[Run Order](#) Order

[OK](#) [Cancel](#)

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[MDS](#)

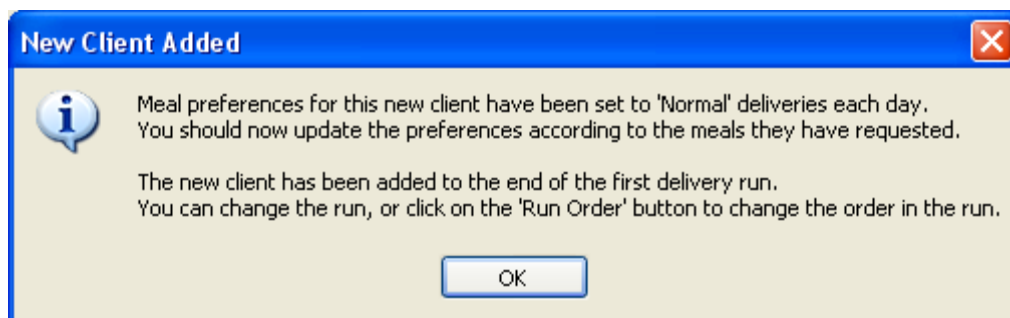
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[Activity](#)

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4.4 Preferences

When you have completed the necessary details on the left hand side of the *Client Details* window, click anywhere on the right hand side of the window. A dialog box entitled *New Client Added* will appear. When you have read it, click on OK.



The dialog box will inform you that the "Normal" quantities of each Meal Item, which you chose in the set-up process (see Section 3.3), have been set for this client. This just represents a starting point for a typical client. You can vary any of the quantities to suit the client's individual wishes, as discussed below.

The dialog box also informs you that this client has been added to the end of the first delivery run which you named in the set-up process (see Section 3.1). See Section 4.7 for instructions on how to change the client to a different run or to a different place in the first run.

Any of the quantities can be entered individually for any of the Meal Items, for any day of the week. But there are also some shortcut methods of enter preferences.

If you want to use the Usual quantities for each Meal Item on a particular day of the week, you can tick the box above that day. This will make all the quantities for that day the same as the quantities in the Usual column. If you don't want anything delivered on a particular day, just clear the box above that day. All quantities for that day will then become zero.

Preferences

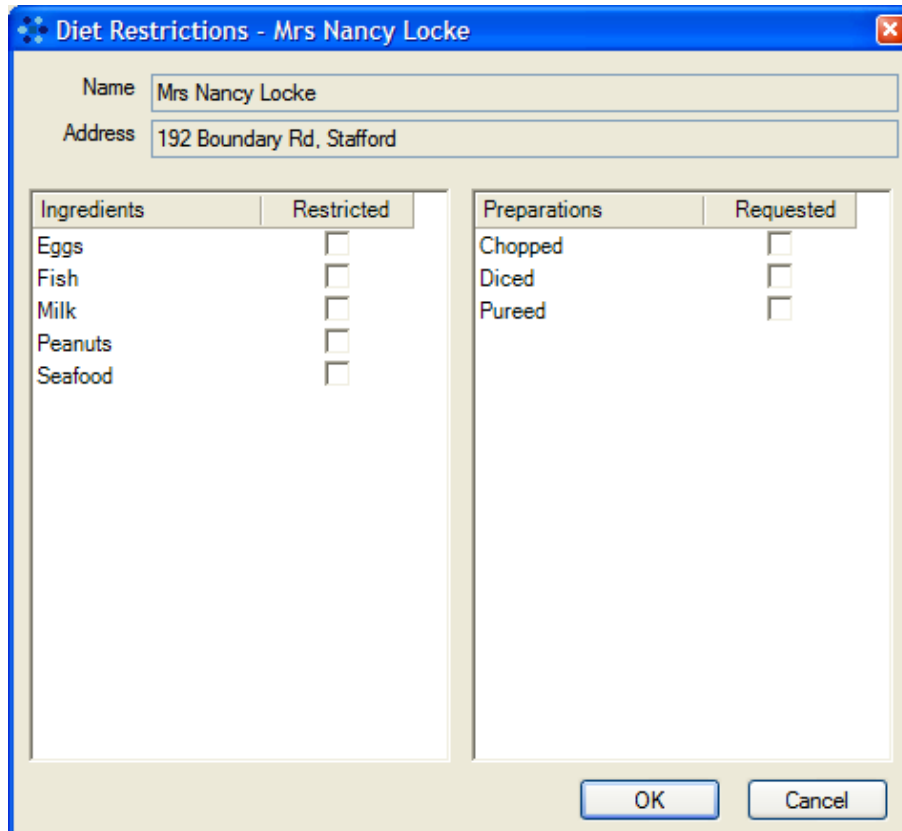
Item	Usual	<input checked="" type="checkbox"/> M	<input checked="" type="checkbox"/> Tu	<input type="checkbox"/> W	<input checked="" type="checkbox"/> Th	<input checked="" type="checkbox"/> F
Meal	1	1	1	0	1	1
Special	0	0	0	0	0	0
Frozen	0	0	1	0	0	0
Salad	0	0	0	0	0	0
Soup	1	1	2	0	1	1
Desert	1	1	2	0	1	1
Diabetic	0	0	0	0	0	0
Fruit	0	0	0	0	0	0
Orange Juice	1	1	2	0	1	1
Apple Juice	0	0	0	0	0	0

If you change the Usual quantity for one of the Meal Items, it will also change for each day of the week that has the box ticked. This means that if the Meal Item quantities for a particular day of the week are the same as the Usual quantities, and the Usual quantities are changed, then they are also changed for those days, so they will still end up having the Usual quantities for all Meal Items.

The preferences shown here for Monday to Friday only, which is the standard operating mode. However, it is possible to also show preference for weekends – Saturdays and Sundays. Weekend Deliveries can be enabled from the Options Windows as described in Section 2.3.

4.4.1 Diet

When you click the *Diet* button, a window entitled *Diet Restrictions* will open. All of the ingredients which you entered in the *Meal Ingredients* window (see Section 3.4) will be listed on the left hand side and all of the preparations which you entered in the *Meal Preparations* window (see Section 3.5) will be listed on the right hand side.



Ingredients	Restricted	Preparations	Requested
Eggs	<input type="checkbox"/>	Chopped	<input type="checkbox"/>
Fish	<input type="checkbox"/>	Diced	<input type="checkbox"/>
Milk	<input type="checkbox"/>	Pureed	<input type="checkbox"/>
Peanuts	<input type="checkbox"/>		
Seafood	<input type="checkbox"/>		

Place a tick beside any ingredients that are restricted for this client, and any preparations that are requested by this client. When you have finished, click OK to save the changes.



If you want to change *Meal Ingredients* or *Meal Preparations* for a client for a short period of time, perhaps when he/she is ill or recovering from an operation, you will need to make the desired changes in the *Diet* window and change back to the client's regular preferences when necessary.

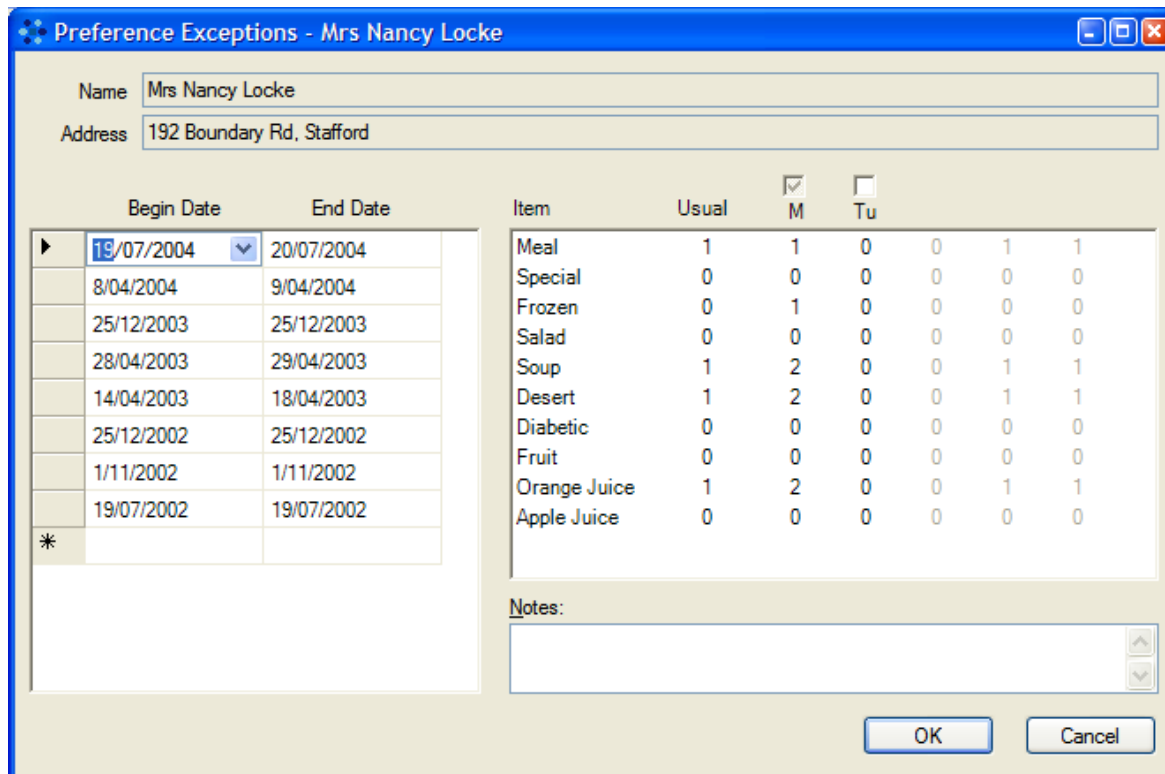
When a Kitchen Report (see Section 10.1) is printed, it will include a list of client and ingredient incompatibilities so that the kitchen staff can address any problems. This information will also appear on Delivery Reports and labels (where that option has been utilised). This ensures that meals which have been specially prepared are given to the correct clients.



Ingredient restrictions will only apply if the client has nominated an ingredient that is being used that day in a Meal Item that is part of their preferences. Similarly, Meal Preparations will only apply if the preparations they have requested are available for Meal Items that are part of their preferences. See Section 3.6 for more details.

4.4.2 Exceptions

This function of the MealsOnDisk program will be useful when a client's needs change temporarily, for example if he/she is away from home on a holiday or in hospital, or unable to eat his/her Usual delivery because of illness or recovering from an operation.



Begin Date	End Date	Item	Usual	<input checked="" type="checkbox"/> M	<input type="checkbox"/> Tu
19/07/2004	20/07/2004	Meal	1	1	0
8/04/2004	9/04/2004	Special	0	0	0
25/12/2003	25/12/2003	Frozen	0	1	0
28/04/2003	29/04/2003	Salad	0	0	0
14/04/2003	18/04/2003	Soup	1	2	0
25/12/2002	25/12/2002	Desert	1	2	0
1/11/2002	1/11/2002	Diabetic	0	0	0
19/07/2002	19/07/2002	Fruit	0	0	0
		Orange Juice	1	2	0
		Apple Juice	0	0	0

To add a new exception, go to the bottom of the date table on the left hand side of the window, and use the empty row marked with an asterisk. Enter the Begin Date and End Date for period that the exception covers, and then click on the table on the right hand side of the window. This will result in the normal preferences being copied to the table as the starting point. You can then changes the preferences for that exception period in the same way you would for normal preferences.

As indicated in the picture above, if the dates for an exception are for a period of less than one week, you will only be able to enter preferences for the applicable days of the week. For example, because the selected exception is for a two day period from 19th to 20th Jul 2004, only the Monday and Tuesday preferences are available.

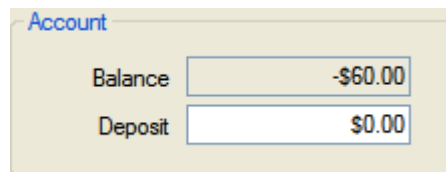
Notes can also be kept for each exception, allowing you to keep information such as why the exception was required, or who made the request. When all the changes have been made, click OK to save them.



Preference Exceptions are designed for temporarily changing delivery days or meal preferences. If you wish to change *Meal Ingredients* or *Meal Preparations* temporarily, use the method described in the Information Box above.

4.5 Account

When a new client is created, the amount shown in the *Deposit* field will be blank. Its purpose is to record any amount which you have charged the client as a security deposit. Some Meals on Wheels services may not use this option. If an amount is entered in this field, it does not feature in any financial or historical reports and does not affect the client's balance in any way.



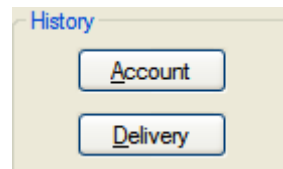
The Account window displays two input fields: 'Balance' with a value of -\$60.00 and 'Deposit' with a value of \$0.00.

When a new client is created, the amount shown in the *Balance* field will also be blank and will remain blank until deliveries have been made to the client. The MealsOnDisk program will then start to calculate the client's balance as deliveries are processed and payments recorded. See Section 7 for more information on processing deliveries.

The amount which appears in the *Balance* field can only be changed by applying payments or adjustments, accessed by the "View" menu at the top of the MealsOnDisk screen. It is not possible to manually adjust the amount which appears in the *Balance* field. See Section 6 for more information on recording payments and adjustments.

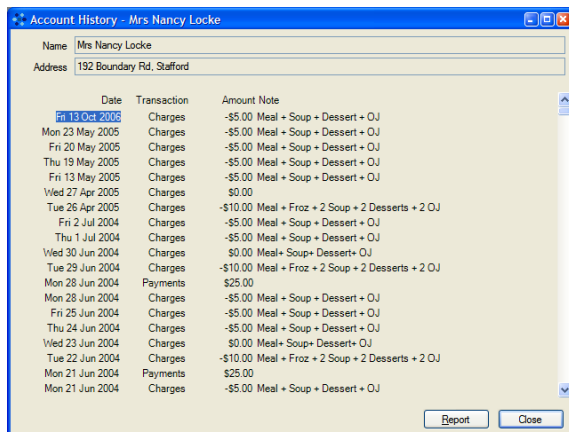
4.6 History

Clicking on the *Account* button will open a window which shows all financial transactions for that client, including meal charges, payments and any adjustments which have been made. All entries are sorted by date.



The History window contains two buttons: 'Account' and 'Delivery'.

Clicking on the *Delivery* button will open a window which shows all deliveries made to that client, including details of what was delivered, whether the delivery was invoiced and whether it qualified for subsidised pricing.

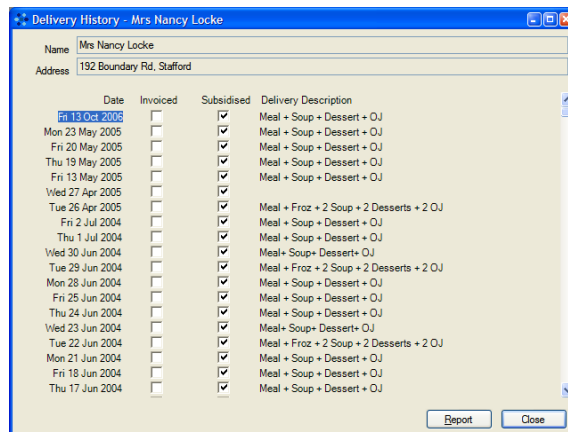


Account History - Mrs Nancy Locke

Name: Mrs Nancy Locke
Address: 192 Boundary Rd, Stafford

Date	Transaction	Amount	Note
Fri 13 Oct 2006	Charges	-\$5.00	Meal + Soup + Dessert + OJ
Mon 23 May 2005	Charges	-\$5.00	Meal + Soup + Dessert + OJ
Fri 20 May 2005	Charges	-\$5.00	Meal + Soup + Dessert + OJ
Thu 19 May 2005	Charges	-\$5.00	Meal + Soup + Dessert + OJ
Fri 13 May 2005	Charges	-\$5.00	Meal + Soup + Dessert + OJ
Wed 27 Apr 2005	Charges	\$0.00	
Tue 26 Apr 2005	Charges	-\$10.00	Meal + Froz + 2 Soup + 2 Desserts + 2 OJ
Fri 2 Jul 2004	Charges	-\$5.00	Meal + Soup + Dessert + OJ
Thu 1 Jul 2004	Charges	-\$5.00	Meal + Soup + Dessert + OJ
Wed 30 Jun 2004	Charges	\$0.00	Meal+ Soup+ Dessert+ OJ
Tue 29 Jun 2004	Charges	-\$10.00	Meal + Froz + 2 Soup + 2 Desserts + 2 OJ
Mon 28 Jun 2004	Payments	\$25.00	
Mon 28 Jun 2004	Charges	-\$5.00	Meal + Soup + Dessert + OJ
Fri 25 Jun 2004	Charges	-\$5.00	Meal + Soup + Dessert + OJ
Thu 24 Jun 2004	Charges	-\$5.00	Meal + Soup + Dessert + OJ
Wed 23 Jun 2004	Charges	\$0.00	Meal+ Soup+ Dessert+ OJ
Tue 22 Jun 2004	Charges	-\$10.00	Meal + Froz + 2 Soup + 2 Desserts + 2 OJ
Mon 21 Jun 2004	Payments	\$25.00	
Mon 21 Jun 2004	Charges	-\$5.00	Meal + Soup + Dessert + OJ

Report Close



Delivery History - Mrs Nancy Locke

Name: Mrs Nancy Locke
Address: 192 Boundary Rd, Stafford

Date	Invoiced	Subsidised	Delivery Description
Fri 13 Oct 2006	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Meal + Soup + Dessert + OJ
Mon 23 May 2005	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Meal + Soup + Dessert + OJ
Fri 20 May 2005	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Meal + Soup + Dessert + OJ
Thu 19 May 2005	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Meal + Soup + Dessert + OJ
Fri 13 May 2005	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Meal + Soup + Dessert + OJ
Wed 27 Apr 2005	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Tue 26 Apr 2005	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Meal + Froz + 2 Soup + 2 Desserts + 2 OJ
Fri 2 Jul 2004	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Meal + Soup + Dessert + OJ
Thu 1 Jul 2004	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Meal + Soup + Dessert + OJ
Wed 30 Jun 2004	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Meal+ Soup+ Dessert+ OJ
Tue 29 Jun 2004	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Meal + Froz + 2 Soup + 2 Desserts + 2 OJ
Mon 28 Jun 2004	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Meal + Soup + Dessert + OJ
Fri 25 Jun 2004	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Meal + Soup + Dessert + OJ
Thu 24 Jun 2004	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Meal + Soup + Dessert + OJ
Wed 23 Jun 2004	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Meal+ Soup+ Dessert+ OJ
Tue 22 Jun 2004	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Meal + Froz + 2 Soup + 2 Desserts + 2 OJ
Mon 21 Jun 2004	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Meal + Soup + Dessert + OJ
Fri 18 Jun 2004	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Meal + Soup + Dessert + OJ
Thu 17 Jun 2004	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Meal + Soup + Dessert + OJ

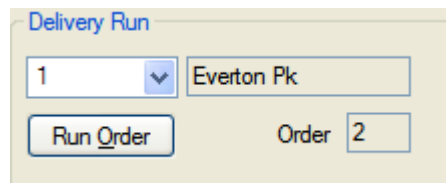
Report Close

Clicking on the *Report* button on the bottom of either of these windows will transform the information into a report which is able to be printed or exported as a file. Use the toolbar at the top of the report to perform these actions, scroll through the pages of the report, zoom in and out or search the text of the report.

4.7 Delivery Run

When a new client is added, a dialog box informs you that the client has been added to the end of the first delivery run (see Section 4.2). The run which a client is placed on and their position on the run are obviously important for ensuring that delivery runs are smooth and efficient. Many of the reports generated by the MealsOnDisk program will be sorted by delivery runs. See Section 10.2 for more information on *Delivery Reports*.

To move a client to a new delivery run, select from the drop-down list the run which you would like this client to be included on. When you click anywhere on the screen, a dialog box will appear informing you that this client is about to be moved to the end of the chosen run. You will be required to click yes to continue or *no* to cancel.



The 'Delivery Run' dialog box features a dropdown menu with '1' selected, a text field containing 'Everton Pk', a 'Run Order' button, and an 'Order' field with the value '2'.

If you wish to move a client to another position in a run, this can be done by clicking *Run Order*, which will open the *Delivery Run Order* window, as shown below.



The 'Delivery Run Order - Run 1 (Everton Pk)' window displays a table of clients for a specific run. The table has columns for Name, Address, and Driving Instructions. A navigation bar at the bottom includes buttons for navigating between runs, a status indicator '1 of 9', a link to 'Delivery Run Map', and an 'OK' button.

Run	Description
1	Everton Pk

	Name	Address	Driving Instructions
▶	Mr John Viles	193 Webster Rd, Stafford	Return; L into Gilbert Rd; R into Fuller St; L into Damo
	Mrs Molly Grant	19 Beattie Rd, Grange	Continue; straight into Boomerang St; R into Brook St;
	Mrs Maria Garibaldi	29 Johnson St, Stafford	
	Mrs Joan Smith	15 Williams St, Grange	Continue; L into Swinburne St; L into Brook St
	Mrs Helen Harrison	2/21 Potter St, Grange	Return; L into Fuller St; straight into Daphne St; L into
	Mr Mike Holmes	52 First Ave, Grange	
	Mr Peter Cochrane	17 Raven St, Stafford	Return; L into Webster Rd
	Mrs Dora Wooton	1/77 Webster Rd, Stafford	Return; L into Webster Rd; L into Sayers St; R into The
	Mrs Kylie Jones	26 Ashton St, Grange	
	Mrs Edith Lyall	17 Jones St, Lutwyche	Return; R into Agincourt St; L into Baltic St; R into How
	Mr Joe Blewitt	123 School St, Windsor	
	Mrs Mavis Hill	29 The Corso, Windsor	

To move a client to a different position in the delivery run order, click in the left hand column (row header) next to that client's name and drag the mouse/cursor to the new position. Release the mouse button.

If you want to look at any of the details for one of the clients, you can double click on the row header next to the client's name to view details for that one client. You will need to close that *Client Details* window to return to the *Delivery Run Order* window.

Use the navigation bar at the bottom of the *Delivery Run Order* window to move between runs. The navigation bar pictured on the right is showing that the *Delivery Run Order* window is



The navigation bar shows buttons for navigating between runs, a status indicator '1 of 9', and an 'OK' button.

displaying the first of nine delivery runs. The button on the far left will take you to the first run, the inside left button to the previous run, the inside right button to the next run and the far right button to the last run.

There is also space in the *Delivery Run Order* window to enter driving instructions to assist volunteers in travelling from one client's home to the next. You may choose to enter a lot of detail, a little or none at all. The driving instructions you enter will appear in the *Driving Instructions* and *Driving Instructions (All)* reports which are separate from the *Delivery List* reports. Most meal services will not need to change the driving instructions very often or print the *Driving Instructions* reports very often either. See Section 10.2.4 for more information on *Driving Instructions* reports.

The link to the right of the navigation bar will display a map of the selected delivery run in a web browser using [Google Maps](#). The map shows a route for driving from the meal service centre to each of the clients, and then returning to the meal service centre. The address used for the meal service centre is the address that is displayed in the *Service Details* section of the *Options* window (see Section 2.3.1).

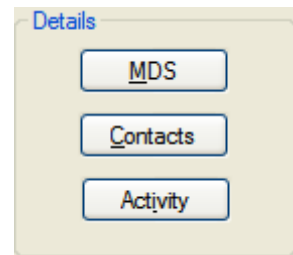
[Delivery Run Map](#)

The map that is displayed will include approximate driving distances and travel times, as well as driving instructions. It may assist in determining the order in which clients should appear in a delivery run.

Maps are generally accurate down to the property level right across Australia and they can be displayed as maps or satellite images. To make use of this feature, your computer must be connected to the internet. While this feature makes use of the free mapping service provided by Google, normal internet access charges from your ISP will apply.

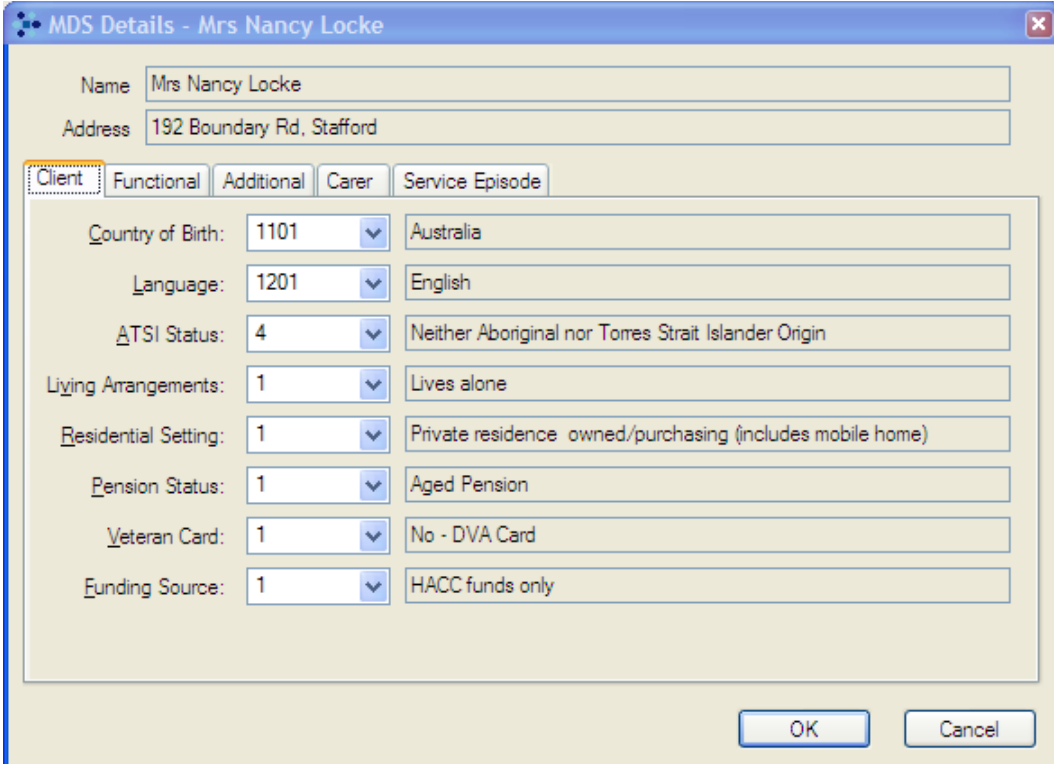
4.8 Details

This section of the *Client Details* window includes three buttons that will open other windows that allow more client details to be entered. The first allows HACC MDS information to be collected and used for MDS reporting. The second allow you to collect contact details for any number of people associated with the client, such as relatives, doctors etc. And the third provides a place to record details of any contact or interaction with the client. This may include provision of other HACC services, and any such details will be automatically included on the applicable MDS report.



4.8.1 MDS Details

This window allows additional client details which are only required for MDS reporting to be entered. Similar types of information have been grouped together on five different tabs. Most of the details can be selected from options on pull-down lists. The choices listed in those lists have been specified as part of the MDS reporting requirements. For more information on those choices, you should contact your local HACC representative.

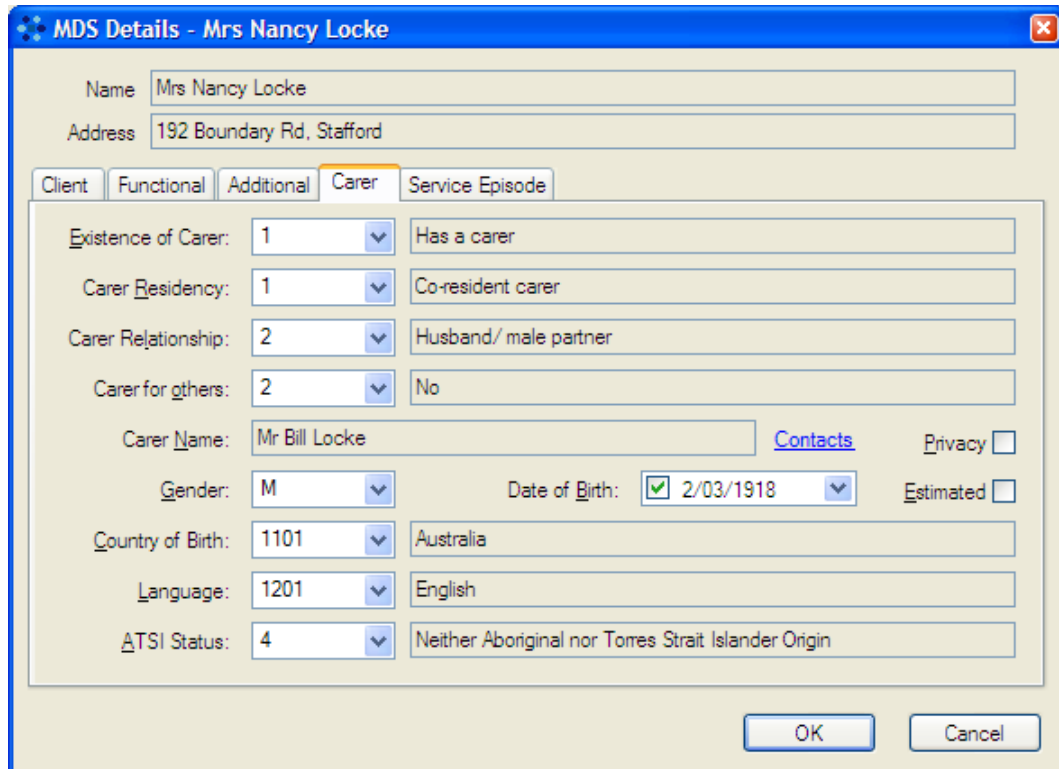


The Functional and Additional tabs allow you to enter information about the client and his/her capacity to deal with everyday tasks. The assessment criteria and the options available are specified by the MDS Report requirements.

The Carer tab allows information about the Client's carer to be recorded. If the Existence of Carer selection indicates that the client does not have a carer, then the selections below will be hidden and cannot be selected. If the client does have a carer, all the options will be visible and the most appropriate selections should be made from the choices provided.

Please note that the name of the client's carer cannot be entered directly. Name and address details of the carer are recorded as one of the client's contacts. If the client has a contact of the type "Carer", their name will be displayed in the Carer Name section. To add a carer, or to change any of the carer's name and address details, click on the Contacts link to the right of the Carer Name section. This will display the Contact window for the client (see Section 4.8.2 for more details on Client Contacts).

The Privacy checkbox should be selected if the client's carer wishes to restrict the information that is provided about them in your MDS Report.



The screenshot shows the 'MDS Details - Mrs Nancy Locke' window with the 'Carer' tab selected. The window contains the following fields and options:

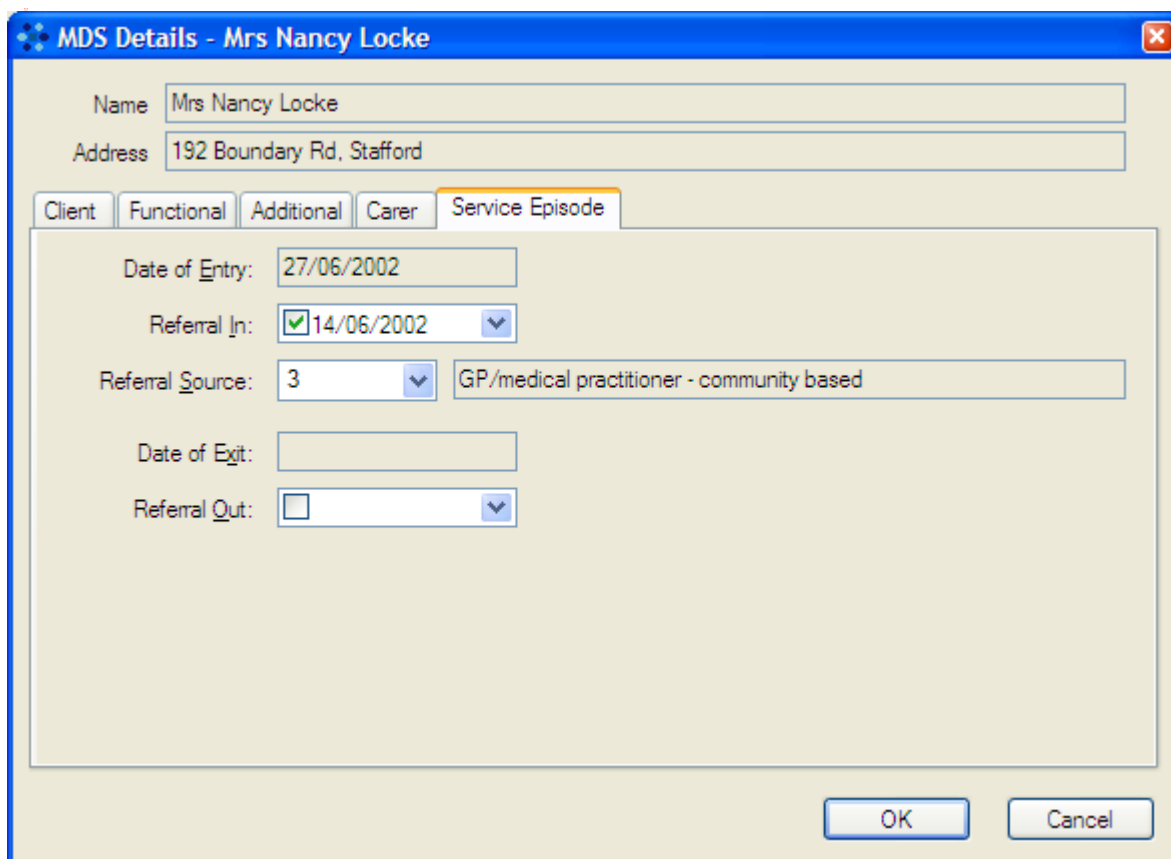
- Name:** Mrs Nancy Locke
- Address:** 192 Boundary Rd, Stafford
- Tabs:** Client, Functional, Additional, **Carer**, Service Episode
- Existence of Carer:** 1 (Has a carer)
- Carer Residency:** 1 (Co-resident carer)
- Carer Relationship:** 2 (Husband/ male partner)
- Carer for others:** 2 (No)
- Carer Name:** Mr Bill Locke (with a [Contacts](#) link)
- Privacy:** ☐
- Gender:** M
- Date of Birth:** ☒ 2/03/1918 (with an ☐ Estimated checkbox)
- Country of Birth:** 1101 (Australia)
- Language:** 1201 (English)
- ATSI Status:** 4 (Neither Aboriginal nor Torres Strait Islander Origin)
- Buttons:** OK, Cancel

The Service Episode tab allows details to be recorded about the period when your organisation provided services to the client. The Date of Entry and Date of Exit cannot be changed, as they taken directly from the Start Date and End Date on the Client window. If they need to change, this should be done from the Client Details window (see Section 4).

Referral In is the date that the client was referred to your organisation. This date may be prior to the **Date of Entry**, which is the date you commenced providing services to the client. The **Referral Source** section below will only be shown if a date has been selected for Referral In. Several options are available to be selected for Referral Source to indicate how the client was referred to your organisation.

Referral Out is the date that the client was from your organisation to another organisation. This date may be different to the **Date of Exit**, which is the date you ceased (or will cease) providing services to the client. The **Referral Target** section will only be shown if a date has been selected for Referral Out. Several options are available to be selected for Referral Target to indicate which organisation the client was referred to.

If a Date of Exit is shown, indicating the final date services were (or will be) provided to the client, the **Reason** field will be visible allowing you to select the reason services are no longer provided to the client. Once again, you must select from the options available in the list.



The screenshot shows a software window titled "MDS Details - Mrs Nancy Locke". It contains several input fields and tabs. The "Service Episode" tab is selected. The fields are as follows:

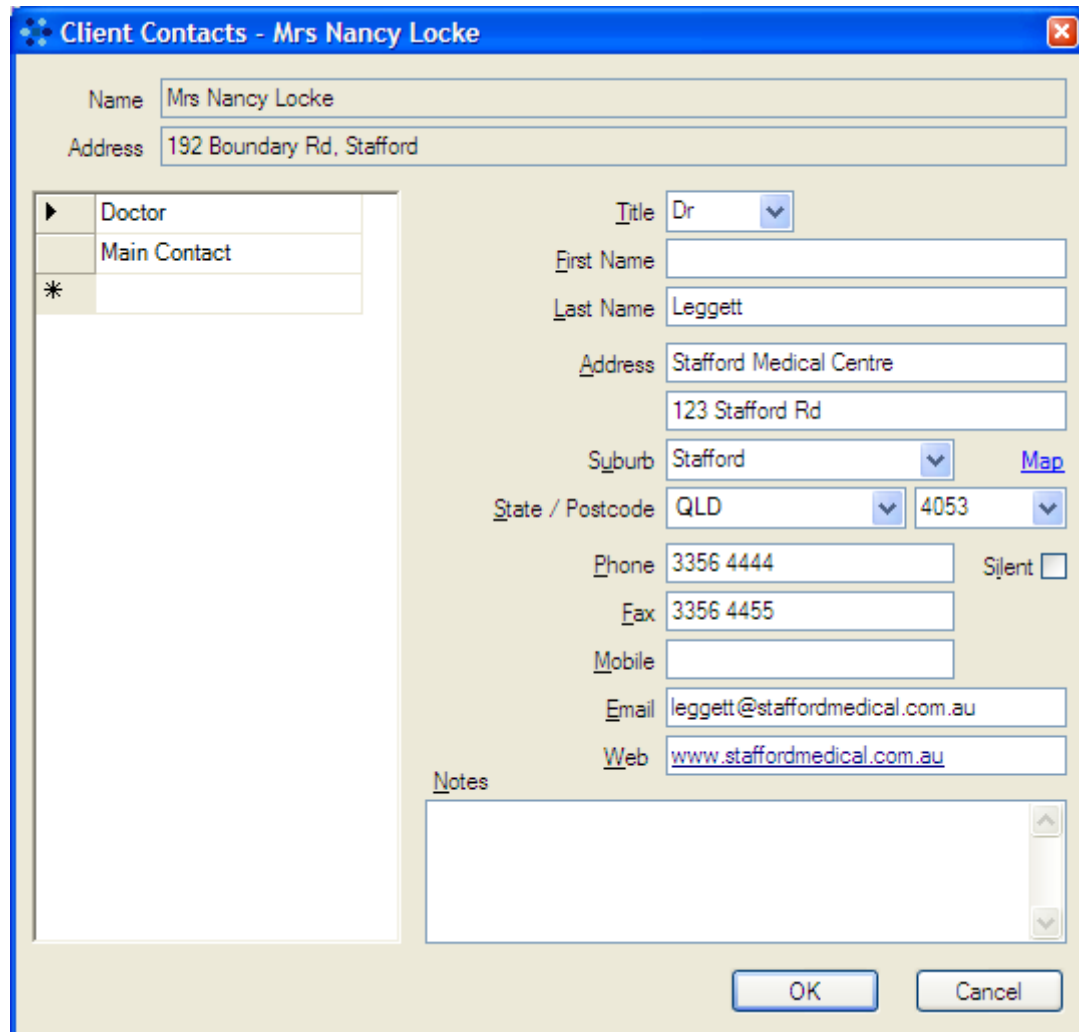
Field	Value
Name	Mrs Nancy Locke
Address	192 Boundary Rd, Stafford
Client	[Selected]
Functional	[Not Selected]
Additional	[Not Selected]
Carer	[Not Selected]
Service Episode	[Selected]
Date of Entry	27/06/2002
Referral In	<input checked="" type="checkbox"/> 14/06/2002
Referral Source	3 GP/medical practitioner - community based
Date of Exit	[Empty]
Referral Out	<input type="checkbox"/> [Empty]

At the bottom right, there are "OK" and "Cancel" buttons.

4.8.2 Client Contacts

Meals on Wheels services at times need to contact somebody in regard to a client. This window allows details of the client's nominated contact people to be recorded. When a new client is created, this window will, of course, be blank. Create a *Client Contact* record by choosing the nature of the person's relationship with the client from the pull-down list or typing in the table on the left hand side of the window. If an appropriate relationship isn't available from the list, you can type in your own.

Complete the necessary or available details on the right hand side and click on OK when you are finished to save the information.



Client Contacts - Mrs Nancy Locke

Name: Mrs Nancy Locke
Address: 192 Boundary Rd, Stafford

▶	Doctor
	Main Contact
*	

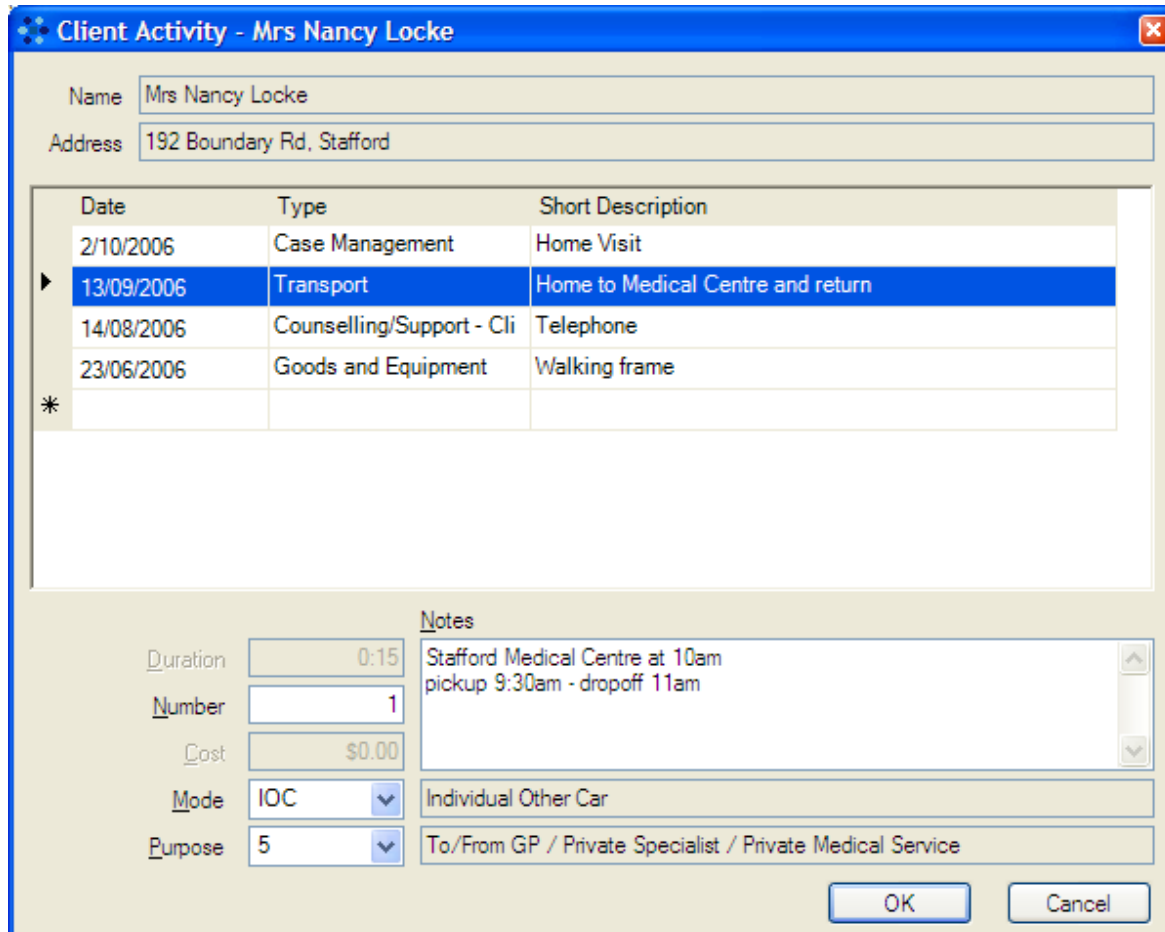
Title: Dr
First Name:
Last Name: Leggett
Address: Stafford Medical Centre
123 Stafford Rd
Suburb: Stafford
State / Postcode: QLD 4053
Phone: 3356 4444
Fax: 3356 4455
Mobile:
Email: leggett@staffordmedical.com.au
Web: www.staffordmedical.com.au
Map
Notes:
OK Cancel

The Map link works the same way as the Map link on the Client Details window. See Section 4.2 for more information.

To create a second contact, click the blank row marked with an asterisk at the bottom of the table, and continue as before.

4.8.3 Client Activity

This window will be of most use to Multi-Service Organisations who provide HACC services other than meal deliveries. Information entered here by those services will be included in MDS reports. However, it is possible to use this section as a notebook to record non-HACC services which will not be included in MDS reports eg phone calls.



Client Activity - Mrs Nancy Locke

Name: Mrs Nancy Locke
Address: 192 Boundary Rd, Stafford

Date	Type	Short Description
2/10/2006	Case Management	Home Visit
13/09/2006	Transport	Home to Medical Centre and return
14/08/2006	Counselling/Support - Cli	Telephone
23/06/2006	Goods and Equipment	Walking frame
*		

Duration: 0:15
Number: 1
Cost: \$0.00
Mode: IOC
Purpose: 5

Notes: Stafford Medical Centre at 10am pickup 9:30am - dropoff 11am

Individual Other Car
To/From GP / Private Specialist / Private Medical Service

OK Cancel

When the window is opened and you have recorded the date the service was given, click on the blank field under “Type” and you can enter a category or choose from the following list of HACC services.

Domestic Assistance	Other Food Services	Home Maintenance
Social Support	Respite Care	Home Modification
Nursing Care	Assessment - Client	Goods and Equipment
Allied Health Care	Assessment - Carer	Linen Service
Personal Care	Case Management	Transport
Centre-based Day Care	Client Care Coordination - Client	Counselling/Support - Client
Meals	Client Care Coordination - Carer	Counselling/Support - Carer

There is space on the right hand column to enter a short description of the activity which will appear in Client Activity reports. (see Sections 10.4.3 and 10.4.4 for more details) Information entered in the larger “Notes” space at the bottom of the window will not appear in reports.

If a HACC service type has been chosen, when you click anywhere else in the window, one or more of the fields in the bottom right part of the window will become usable. Which section becomes usable depends on the type of HACC service chosen and how it is measured. This is specified in the MDS reporting standards.

If the **Duration** field becomes usable, you can type in the length of time the service took in hours and minutes. If the **Number** field becomes usable, you can type in the number of service items provided. If the **Cost** field becomes usable, you can type in the cost of the service provided. There are also **Purpose** and **Mode** fields for the type of transport that was provided, and a **Setting** field to indicate whether certain services were provided in the home or at a centre.

Note that if you choose the “Goods and Equipment” HACC service from the pull-down list, the usable field at the bottom left will be the “Goods” field. You will need to choose one of the following type of goods from another pull-down list.

- Self-Care Aids
- Support and Mobility Aids
- Communication Aids
- Aids for Reading
- Medical Care Aids
- Car Modifications
- Other Goods/Equipment

A separate report containing non-MDS Client Activity History can be created (see Section 10.4.4), as well as a report containing all Client Activity History (see Section 10.4.3).



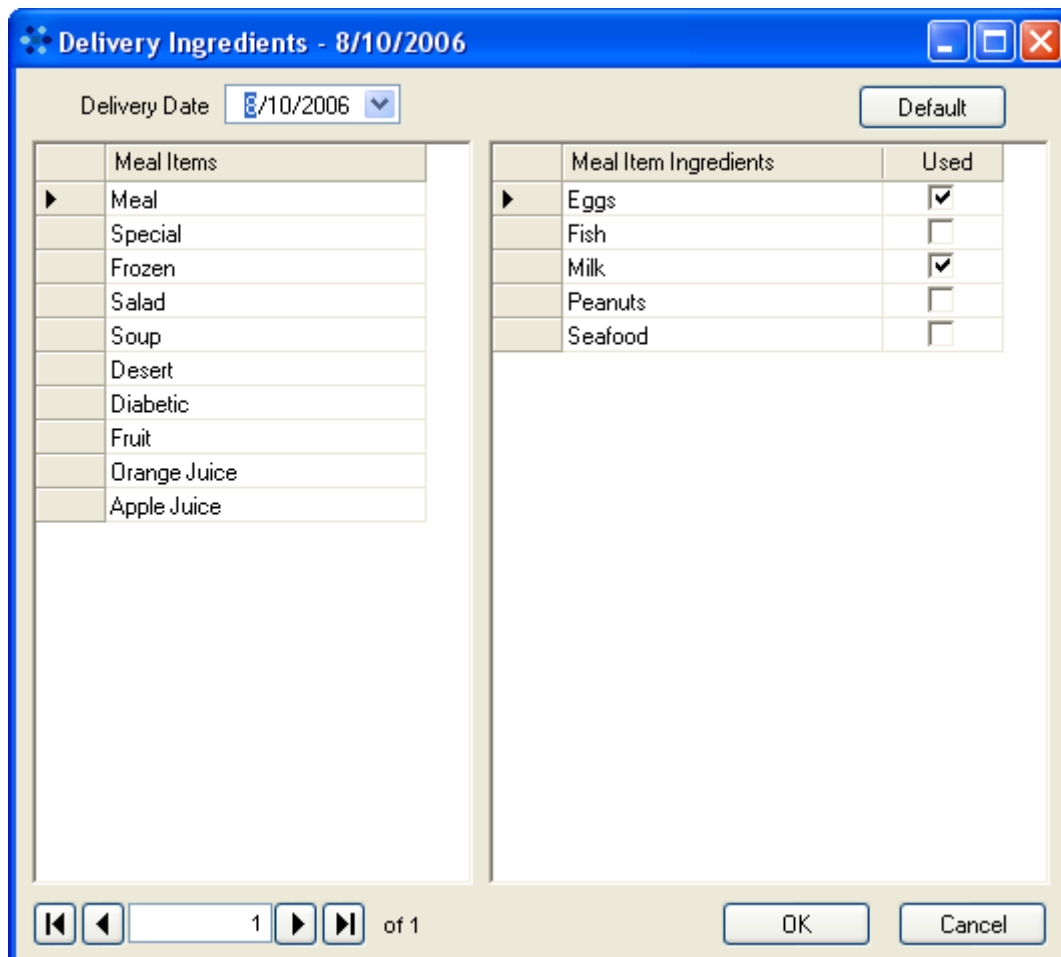
One of the available HACC services is “Meals” and you can select a Setting of “Home”. You would not normally need to use this option but, for example, if you began using the MealsOnDisk program midway through a quarter and wanted to transfer information from your previous software program, meals from the earlier part of the quarter could be recorded manually using this feature. At the end of the quarter, when you create an MDS report, the MealsOnDisk program will use both sets of records (automatically generated by MealsOnDisk and those recorded under the client’s *Activity* window) to create one report. Anything recorded would also appear in an MDS Client Activity report.

5 Delivery Ingredients

The *Delivery Ingredients* window is part of the function which alerts kitchen staff to any dietary restrictions your clients may have. It is where you record the ingredients that will be used in meals on a particular day. It can be accessed by clicking on “View” on the menu at the top of the MealsOnDisk screen and then on “Delivery Ingredients”.

When you open the *Delivery Ingredients* window, it will show the ingredients used for the current day. All Meal Items that have been entered in the *Meal Items* window (see Section 3.3) will appear on the left hand side of the window. All Ingredients that have been entered in the *Meal Ingredients* window (see Section 3.4) will appear on the right hand side along with a box indicating whether the ingredient is Used in that particular meal item on that day.

The window shown below indicates that Eggs and Milk are used in the Meal Item called “Meal” on 8th Oct 2006. To determine the ingredients used in the other Meal Items, you need to select a row associated with one of the other Meal Items. When this is done, the ticks in the boxes in the Ingredients table will change, indicating which ingredients are used.



Delivery Ingredients - 8/10/2006

Delivery Date: 8/10/2006 Default

Meal Items	Meal Item Ingredients	Used
▶ Meal	▶ Eggs	<input checked="" type="checkbox"/>
Special	Fish	<input type="checkbox"/>
Frozen	Milk	<input checked="" type="checkbox"/>
Salad	Peanuts	<input type="checkbox"/>
Soup	Seafood	<input type="checkbox"/>
Desert		
Diabetic		
Fruit		
Orange Juice		
Apple Juice		

1 of 1 OK Cancel

It is possible to copy whatever you have chosen as Used in the *Meal Item Details* window (see Section 3.6) by clicking on the default button at the top of the window. However these should be checked and altered if necessary every day, after consultation with the kitchen staff, because the ingredients included in a meal item may be different on that day from what has been recorded in the set-up process.

Move to any day by using the date field at the top of the window. Alternatively, use the navigation bar at the bottom of the window to review Delivery Ingredients details that are already stored in the database.



For alerts on restricted ingredients to appear on Kitchen and Delivery reports, it is necessary to enter the information in the *Delivery Ingredients* window for each day in the period the report will cover.

6 Payments and Adjustments

Both the Payments and Adjustments windows can be accessed by clicking on the “View” button on the menu at the top of the MealsOnDisk screen and then on “Payments” or “Adjustments”.

6.1 Payments

The *Payments* window records, with a separate window for each run, the amount (if any) which each client owes to the meal service. This window is where payments due are displayed and payments received are recorded.

There is also a notes column and anything recorded in this column will also appear in the client’s *Account History* window.

You can move from one date to another using the “Payment Date” field at the top of the window, and from one run to another using the toolbar at the bottom of the window.



Run	Description	Payment Date	Balance	Paid	Remaining	Inv	Notes
1	Everton Pk	10/10/2006	-\$2,201.40	\$0.00	-\$2,201.40		
Name	Address	Balance	Paid	Remaining	Inv	Notes	
Mr John Viles	193 Webster Rd, Stafford	-\$35.00		-\$35.00			
Mrs Molly Grant	19 Beattie Rd, Grange	-\$60.00		-\$60.00			
Mrs Maria Garibaldi	29 Johnson St, Stafford	-\$60.00		-\$60.00			
Mrs Joan Smith	15 Williams St, Grange	-\$105.00		-\$105.00			
Mrs Helen Harrison	2/21 Potter St, Grange	-\$105.00		-\$105.00			
Mr Mike Holmes	52 First Ave, Grange	-\$105.00		-\$105.00			
Mr Peter Cochrane	17 Raven St, Stafford	-\$95.00		-\$95.00			
Mrs Thelma Wootton	1/77 Webster Rd, Stafford	-\$105.00		-\$105.00			
Mrs Kylie Jones	26 Ashton St, Grange	-\$110.00		-\$110.00			
Mrs Edith Lyall	17 Jones St, Lutwyche	-\$45.00		-\$45.00			
Mrs z Z	z, Alderley	-\$514.80		-\$514.80			
Miss z z	z, Enoggera	-\$514.80		-\$514.80			
Mr Joe Blow	123 School St, Windsor	-\$316.80		-\$316.80			
Mrs Mavis Hill	29 The Corso, Windsor	-\$30.00		-\$30.00			

At the bottom of the window, there is a toolbar with navigation buttons and a status bar showing '1 of 10'.



After payments and adjustments have been recorded, the updated amounts will feature in *Delivery Lists* for the next day’s deliveries once deliveries have been processed for that day.

6.2 Adjustments

The *Adjustments* window is used to record any adjustments to a client's balance which may be necessary. It operates in the same way as described above for the *Payments* window.

Adjustments - Run 1 (Everton Pk)

Run: 1 Description: Everton Pk Adjustment Date: 8/10/2006 Balance: -\$2,201.40 Adjustment: \$0.00 Remaining: -\$2,201.40

Name	Address	Balance	Adjustment	Remaining	Inv	Notes
Mr John Viles	193 Webster Rd, Stafford	-\$35.00		-\$35.00	<input type="checkbox"/>	
Mrs Molly Grant	19 Beattie Rd, Grange	-\$60.00		-\$60.00	<input type="checkbox"/>	
Mrs Maria Garibaldi	29 Johnson St, Stafford	-\$60.00		-\$60.00	<input type="checkbox"/>	
Mrs Joan Smith	15 Williams St, Grange	-\$105.00		-\$105.00	<input type="checkbox"/>	
Mrs Helen Harrison	2/21 Potter St, Grange	-\$105.00		-\$105.00	<input type="checkbox"/>	
Mr Mike Holmes	52 First Ave, Grange	-\$105.00		-\$105.00	<input type="checkbox"/>	
Mr Peter Cochrane	17 Raven St, Stafford	-\$95.00		-\$95.00	<input type="checkbox"/>	
Mrs Thelma Wootton	1/77 Webster Rd, Stafford	-\$105.00		-\$105.00	<input type="checkbox"/>	
Mrs Kylie Jones	26 Ashton St, Grange	-\$110.00		-\$110.00	<input type="checkbox"/>	
Mrs Edith Lyall	17 Jones St, Lutwyche	-\$45.00		-\$45.00	<input type="checkbox"/>	
Mrs z Z	z, Alderley	-\$514.80		-\$514.80	<input type="checkbox"/>	
Miss z z	z, Enoggera	-\$514.80		-\$514.80	<input type="checkbox"/>	
Mr Joe Blow	123 School St, Windsor	-\$316.80		-\$316.80	<input type="checkbox"/>	
Mrs Mavis Hill	29 The Corso, Windsor	-\$30.00		-\$30.00	<input checked="" type="checkbox"/>	

Navigation: [Previous] [Next] 1 of 10

7 Processing Client Deliveries

After you have set up the MealsOnDisk program to suit the needs of your meals service, you will be making alterations and additions to your basic configuration on a day-to-day basis as new clients are added, existing clients removed from the database, clients' preferences or delivery days are changed etc.

After you make changes, the program needs to process these changes; otherwise the changes will not feature in the reports which are described in the following section.



If you have made a change to a client's preferences or run order, altered information will not appear in windows other than the one in which the change is made until Client Deliveries have been processed. Click on "Tools" on the menu at the top of the MealsOnDisk screen, then on "Process Client Deliveries" and choose the date range you desire. It may be as little as one day.

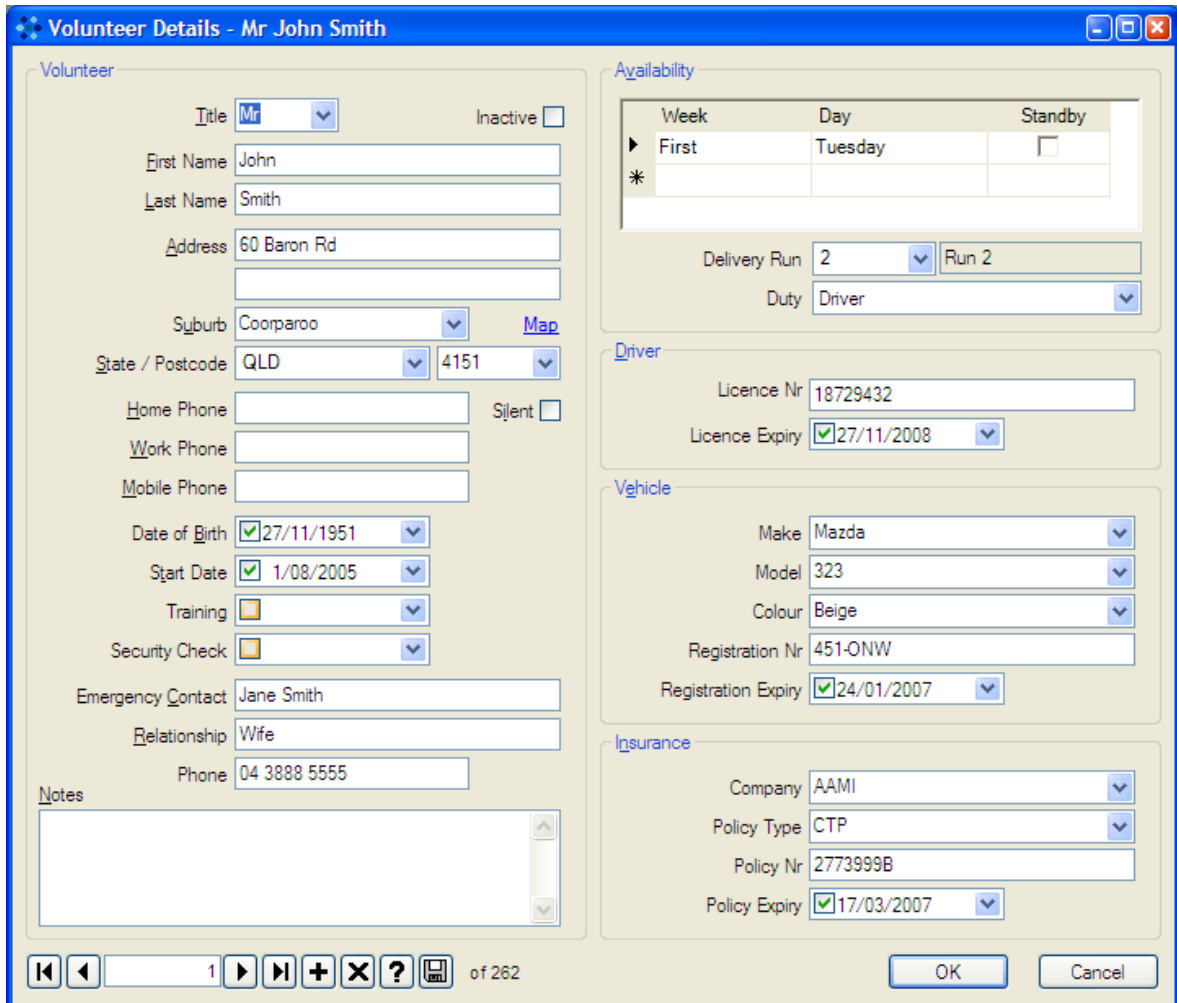
There are two ways to process client information. Either

- click on "Tools" on the menu at the top of the MealsOnDisk screen, then on "Process Client Deliveries" and choose the date range you desire which may be as little as one day, or
- click on "Reports" on the menu at the top of the MealsOnDisk screen, choose the type of report you would like to create, the date range you desire and the program will remind you that information has not been processed for that date range and prompt you to do the processing. Note that any previous information will be overwritten by the changes you have made.



8 Volunteers

8.1 Entering Volunteer Details



Volunteer Details - Mr John Smith

Volunteer

Title: Inactive: ☐

First Name:

Last Name:

Address:

Suburb: [Map](#)

State / Postcode:

Home Phone: Silent: ☐

Work Phone:

Mobile Phone:

Date of Birth: ☒ 27/11/1951

Start Date: ☒ 1/08/2005

Training: ☐

Security Check: ☐

Emergency Contact:

Relationship:

Phone:

Notes:

Availability

Week	Day	Standby
First	Tuesday	<input type="checkbox"/>
*		

Delivery Run: Run 2

Duty:

Driver

Licence Nr:

Licence Expiry: ☒ 27/11/2008

Vehicle

Make:

Model:

Colour:

Registration Nr:

Registration Expiry: ☒ 24/01/2007

Insurance

Company:

Policy Type:

Policy Nr:

Policy Expiry: ☒ 17/03/2007

1 of 262

OK Cancel

The *Volunteer Details* window is similar in appearance to the *Client Details* window, with many of the same fields. The pull-down lists and check boxes work in the same way. Please note that only the volunteer's name, address and contact numbers are the only details from the left hand side of the window which will appear in reports.

The following fields are mandatory:

Title	Address
Last Name	Suburb
	State
	Postcode

Once a **Suburb** or **Postcode** has been entered, it will appear in a drop-down list when you are adding subsequent volunteers and you may choose it from the list instead of re-typing it. The **Map** link works the same way as the Map link on the Client Details window. See Section 4.2 for more information.

States also appear on a drop-down list.

If you check the **Silent** button next to the client's phone number, it will not affect the running of the program. This is intended as a visual cue only.

It is not necessary to enter the volunteer's **Date of Birth**. If you wish to enter a date, check the box and a default date will appear. You can then change the date manually or by using the drop-down calendar. You can scroll slowly through months and years using left and right arrows or choose more quickly by clicking on the month and then the year. A date can be removed by unchecking the box.

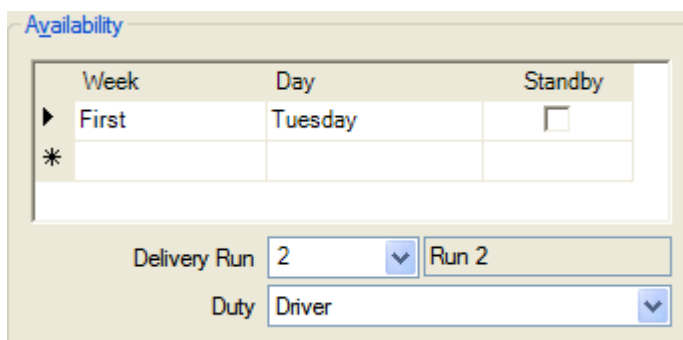
You may enter a **Start Date** which is in the future. The MealsOnDisk program will begin to include that volunteer on the entered date.

The **Training** and **Security Check** fields are also only intended as visual cues. You may wish to record whether the volunteer has completed training and undergone a security check by checking the boxes. There is also space to record the date these events were completed if desired.

The information entered in the **Notes** field will not appear in any reports.

8.1.1 Availability

This window is used to record which days the volunteer is available to work for your meals service. When you are entering a new volunteer, the fields will be blank. Click on the field under the word "week" and a pull-down list will appear. When you have selected something from that list, you can click on the field under the word "day" and select a day of the week.



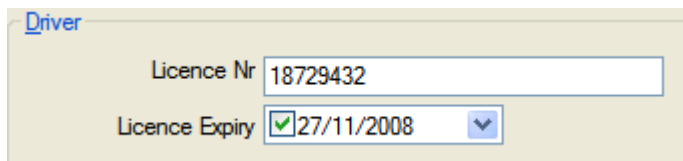
The screenshot shows the 'Availability' window. It contains a table with three columns: 'Week', 'Day', and 'Standby'. The first row has 'First' under 'Week', 'Tuesday' under 'Day', and an unchecked checkbox under 'Standby'. Below the table, there are two dropdown menus: 'Delivery Run' set to '2' and 'Run 2', and 'Duty' set to 'Driver'.

You will end up with an entry something like "every Monday" or "first Tuesday". Multiple lines may be created for enthusiastic volunteers and it is possible to make extra entries to list the volunteer as a standby on certain days.

See Section 10.5.2 for information on *Volunteer Availability* reports.

8.1.2 Driver

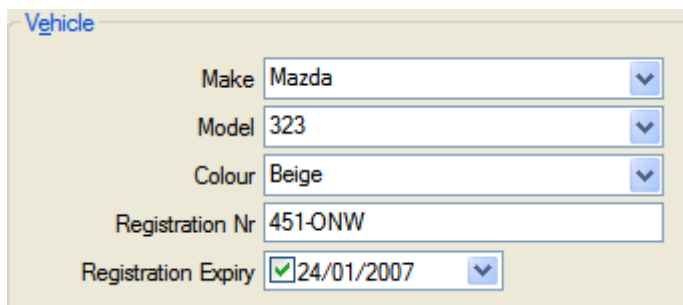
If the volunteer is a driver for your meals service, you may record his/her driver's licence number and the date it is due for renewal. A *Volunteer Expiry* report will list, amongst other things, the date your drivers' licences are due for renewal. See Section 10.5.3 for information on *Volunteer Expiry* reports.



The screenshot shows the 'Driver' window. It has two fields: 'Licence Nr' with the value '18729432' and 'Licence Expiry' with a checked checkbox and the date '27/11/2008'.

8.1.3 Vehicle

You may need to record information on volunteer drivers' vehicles and vehicle registration. Some of the fields have pull-down lists which will be blank to begin with but once a "Make", "Model" or "Colour" has been entered, it will appear in a drop-down list when you are adding subsequent volunteers and you may choose it from the list instead of re-typing it.

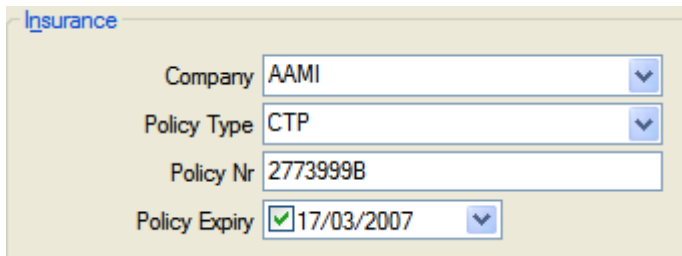


The screenshot shows the 'Vehicle' window. It has five fields: 'Make' (Mazda), 'Model' (323), 'Colour' (Beige), 'Registration Nr' (451-ONW), and 'Registration Expiry' (checked checkbox and date 24/01/2007). Each of the first three fields has a pull-down arrow.

The vehicle's registration number and the date it is due for renewal may also be entered. A *Volunteer Expiry* report will list, amongst other things, the date your drivers' car registrations are due for renewal. See Section 10.5.3 for information on *Volunteer Expiry* reports.

8.1.4 Insurance

You may also need to record information on volunteer drivers' vehicle insurance. Some of the fields have pull-down lists which will be blank to begin with but once a "Company" or "Policy Type" has been entered, it will appear in a drop-down list when you are adding subsequent volunteers and you may choose it from the list instead of re-typing it.



The driver's policy number and the date it is due for renewal may also be entered. A *Volunteer Expiry* report will list, amongst other things, the date your drivers' car registrations are due for renewal. See Section 10.5.3 for information on *Volunteer Expiry* reports.

8.2 Volunteer Payments

This window is used to view and make adjustments to payments due to volunteers.

There will be amounts recorded next to your volunteers' names if you have entered rates of payment to volunteers in the *Volunteer Duties* window (see Section 3.8). These may be adjusted manually in this window. Note that before any Volunteer Reports can be created, it will be necessary to process Volunteer Payments. See the section below.

The figures which appear here are calculated from the rates entered in the *Volunteer Duties* window combined with the run length distances entered in the *Delivery Runs* window (see Section 3.1) to calculate the amount due to the volunteers.



It is advisable to process Volunteer Payments before viewing and after adjusting this window or you may be viewing or reporting on out-of-date information

If the payments displayed in the *Volunteer Payments* window are not what you expected, check that:

- there is a Delivery Run number recorded in each volunteer's profile
- if you are using a per kilometre rate that there is a distance recorded next to each run in the *Delivery Runs* window
- an amount is recorded in the *Volunteer Duties* window for the type of rate you are using – a flat rate per day and/or a rate per kilometre travelled each day.

8.3 Processing Volunteer Payments

Click on "Tools" on the menu at the top of the MealsOnDisk screen, then on "Process Volunteer Payments" and choose the date range you desire which may be as little as one day. You are now able to view the *Volunteer Payments* window or create a *Volunteer Payment* report using updated figures.

9 Menu Cycles

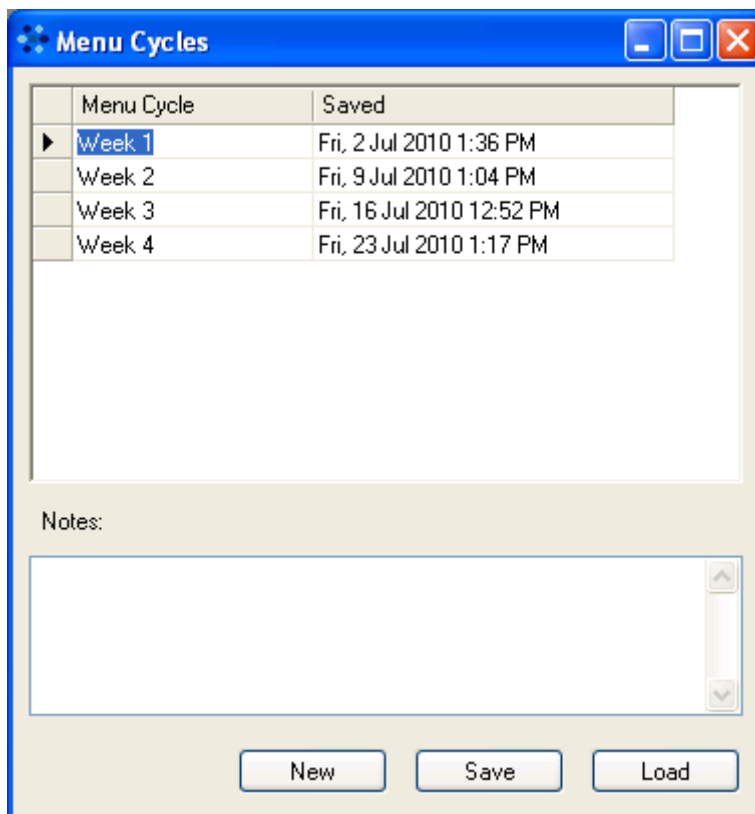
MealsOnDisk currently only allows you to record meal preferences for one week.

Many services are now offering clients more choice through a multi-week rotating menu cycle. A future version of MealsOnDisk may provide support for multi-week menus; however there is currently a way to allow weekly meal preferences to be saved and loaded.

The feature is called Menu Cycles, and it allows you to save the current set of weekly preferences, and to reload a previously saved set of preferences.

For example, if you have a four week menu cycle and wanted to start using this feature, you could enter the meal preferences for all clients for Week 1 and at the end of that week, save this as the first Menu Cycle. Then, you would modify for the preferences for Week 2 and then save those preferences as the next Menu Cycle, before moving on to Week 3. Similarly, for Week 4. However, at the end of Week 4 you would save those preferences, and then load the previously saved preferences from Week 1.

Once all the weeks had been saved, the usual process would be to save the current week's preferences before loading the next week's preferences.



In order to make use of the Menu Cycles feature you must first enable it on the Options window. Please refer to Section 2.3.5 for more information.

Initially, the Menu Cycles windows will not display any menu cycles, and the Save and Load buttons will not be enabled.

9.1 New Menu Cycle

In order to create a new menu cycle, click the New button. A small window will pop up and you will need to enter the name of the Menu Cycle. The Menu Cycle name will appear in the first column of the table. Typically, you would choose Week 1, Week 2 etc as shown, however you can use any name that is meaningful for your service. Please note that a Menu Cycle name must be provided.

Next, another pop up window will appear asking for a description of the Menu Cycle. This information will appear in the Notes field at the bottom of the Menu Cycles window, for the selected Menu Cycle. This field is optional, but provides a way of recording more detailed information about the Menu Cycle.

Once this information has been provided, all meal preferences for all clients will be recorded in the database as that new Menu Cycle. This allows those preferences to be loaded at a later date. The table will be updated to display the new Menu Cycle name and the Saved column will show the date and time that the Menu Cycle was saved.

9.2 Save Menu Cycle

If you have changed meal preferences for a particular week you can record the updated preferences by selecting the appropriate Menu Cycle in the table and clicking the Save button. A message will pop-up warning that the previously recorded Menu Cycle will be replaced with the new meal preferences and you must click Yes to continue.

9.3 Load Menu Cycle

To retrieve a previously saved meal preferences, you would select the week you want to retrieve and click the Load button. A message will pop-up warning that you are about to replace the current set of meal preferences, and you must click Yes to continue.



Usually, you would want to save the current week's meal preferences, before loading meal preferences for another week. For example, at the end of Week 2, you would usually save Week 2 preferences before loading Week 3 preferences. The pop-up warning lets you check whether the current week's meal preferences have been saved.

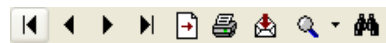
Once the meal preferences have been loaded, and you return to the client window, you will notice that the loaded preferences are now shown for all clients.

10 Reports



It is not possible to change details on reports. If you wish to make changes, it will be necessary to access the appropriate Client, Volunteer or Setup window to make the change, and then re-run the report.

By using the buttons on the menu at the top of any report window, it is possible to move to another page if it is a multi-page report, print the report, export it to a file, zoom in to make the text larger or search the text for a particular word.

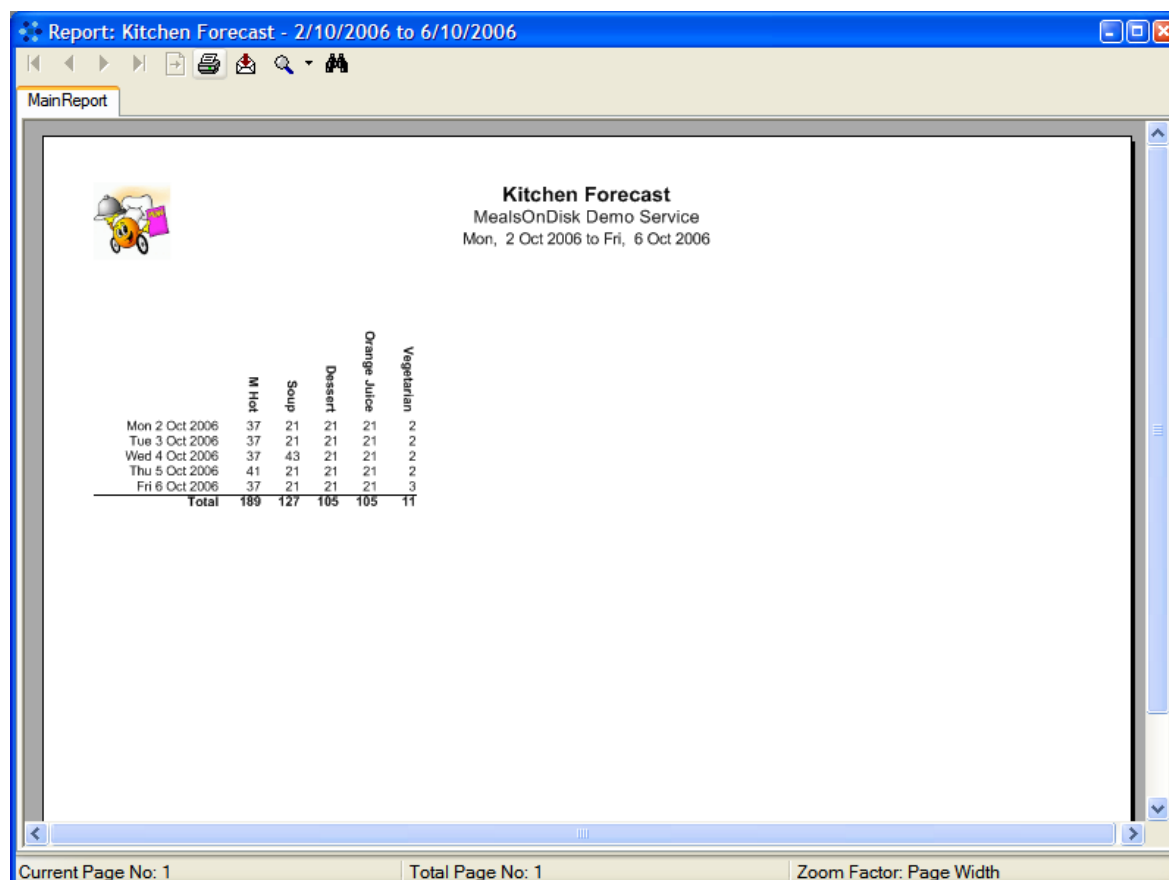


10.1 Kitchen Reports

These reports are designed for use by kitchen staff in preparing meals for delivery and can be accessed by clicking on “Reports” on the menu at the top of the screen, hovering over “Kitchen Reports” and clicking on “Kitchen Forecast”.

10.1.1 Kitchen Forecast

The Kitchen Forecast indicates the number and types of meals anticipated for delivery on a chosen date or dates in the future. When you create a Kitchen Forecast, you will need to choose the date range. A single day may be chosen. The report will list by run and then total how many of each Meal Item will need to be prepared or purchased over that date range.



If you have set up the *Meal Item*, *Meal Ingredients*, *Meal Preparations* and *Meal Item Details* windows as described previously, entered in your clients' dietary preferences and

restrictions and the Delivery Ingredients for the chosen date range, then a single day report will also list how many of these meals need special preparation. This may be because one or more of your clients cannot eat an ingredient contained in one or more of the Meal Items or because one or more clients needs a Meal Item chopped, diced, pureed etc.

10.1.2 Kitchen List Summary

The Kitchen List Summary is similar to the Kitchen Forecast except that it pertains only to one day. It shows details of all Meal Items that need to be prepared for that day and, as described above, any restrictions or special preparations which apply.

10.1.3 Kitchen List Detailed

The *Kitchen List Detailed* Report shows all the Meal Items which need to be prepared for the chosen day but itemises the delivery for each client on each run with a page of the report devoted to each run.. All the information from the other two Kitchen Reports will be shown as well as a breakdown of each client's delivery. The list of Meal Items with special preparations will also indicate which client they are intended for.

10.2 Delivery Reports

Delivery Reports are designed to assist volunteers in the delivery of meals. These reports may be accessed by clicking on “Reports” on the menu at the top of the screen, hovering over “Delivery Reports” and clicking on the name of the type of report you wish to create.

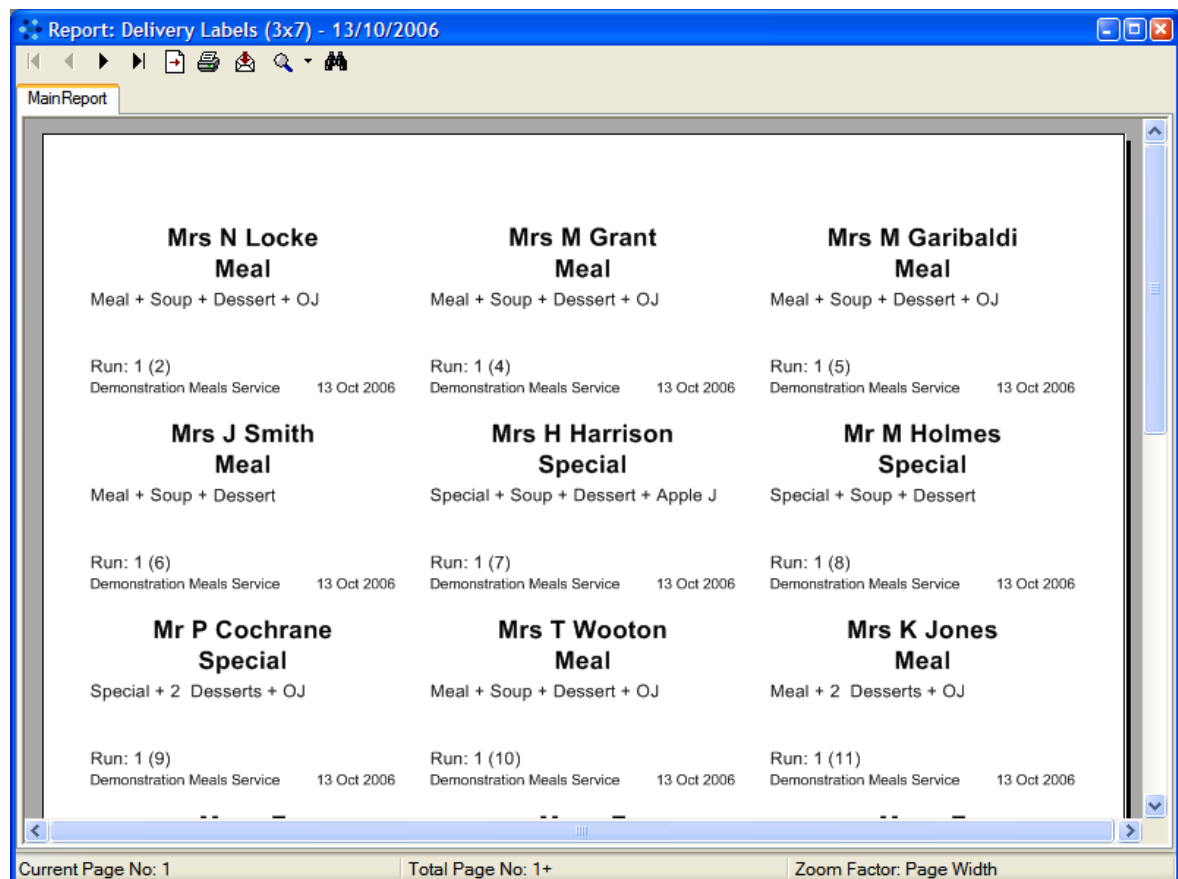
10.2.1 Labels

Sheets of labels may be printed to affix to meal containers to ensure that meals are delivered correctly. There are 3 available sizes and they have been designed to suit the following Avery products (or equivalent).

3x7 Avery L7160
2x8 Avery L7162
2x7 Avery L7163

Each label on the sheet will have:

- a client’s name
- the word “Meal” for a standard meal or the word “Special” for a specially prepared meal
- the Meal Items which the client will receive (eg meal + soup + dessert + apple juice)
- the run number followed by the client’s order in the run in brackets, ie 1(6) means that the client is the sixth person on the first run
- the name of the meal service
- the date



One label is printed for each meal item which has a 1 next to it in the “Number of meals” column in the *Meal Items* window (see Section 3.3). An extra label is included for each meal which has been made to exclude a restricted ingredient or which has a special preparation. A “restriction” label will have a greyed-out section to make it stand out to delivery volunteers.

10.2.2 Delivery List

Delivery Lists are designed to be printed each delivery day and given to volunteers to guide them through their delivery for that day.

When you create a *Delivery List*, there will be a page for each run detailing:

- each client’s name and address,
- which Meal Items need to be delivered to each client,
- any special delivery instructions which you have entered in the client’s profile,
- payment owing with a column for the volunteer to record payment made

As a feature of this program, a column on the left hand side of the window lists each run, making it easy to move between runs by clicking on the name/number of the run you wish to view. **Insert report shot.**

10.2.3 Delivery List (expanded)

The *Delivery List (expanded)* contains exactly the same information and is used in exactly the same way as the *Delivery List*. The difference is that the *Delivery List (expanded)* has a different format and larger print, making it easier to read.

10.2.4 Driving Instructions

A *Driving Instructions* report is designed to be printed out and given to volunteers to guide them through the delivery route. It gives instructions for travelling from the first client’s home to the second client’s etc. This report will only show the clients receiving deliveries on the date you have chosen.

The instructions which appear in this report are whatever has been entered in the right hand column in the *Run Order* window.

10.2.5 Driving Instructions (All)

This report has the same purpose as the *Driving Instructions* report, the difference being that the *Driving Instructions (All)* lists every client on each run. While this report can give a very detailed driving route, depending on how much information you have entered, it will give directions to travel between the homes of every client on the run, regardless of whether each client receives a delivery every day of the week or not.

10.3 Financial Reports

10.3.1 Invoice Summary

An Invoice Summary lists only those clients who have a tick in the “Invoiced” box (see Section 4). No balance will be shown next to these clients’ names on Delivery Lists.

This report will usually cover the period of a month although a different date range can be chosen. The report is arranged in run order and has one line per invoiced client, showing the client’s name, address, number of deliveries made, number of meals delivered and charges made.

As a feature of this program, a column on the left hand side of the window lists each run, making it easy to move between runs by clicking on the name/number of the run you wish to view.

10.3.2 Invoice Statements

An Invoice Statement is very similar to an Invoice Summary except that there will be a separate page for each invoiced client. An Invoice Statement will also list payments and adjustments as well as charges. It is designed to be printed out and given to the client or the person who receives the client’s invoice.

As a feature of this program, a column on the left hand side of the window lists each run, making it easy to move between runs by clicking on the name/number of the run you wish to view. Clicking on the plus sign next to each run name will open another list below of each invoiced client on that run so that you can click on a particular client’s name to display that client’s Invoice Statement.

10.3.3 Monthly Trading

A Monthly Trading report displays by month - for a single month or a number of months – charges made by the meal service to cash-paying clients and to invoiced clients, payments and adjustments made, and outstanding charges.

As a feature of this program, a column on the left hand side of the window lists each month, making it easy to move between months by clicking on the name of the month you wish to view.

10.3.4 Client Trading

A Client Trading report sorts clients into two groups – those who are invoiced and those who pay by cash. It records for each client the number of days he/she received a delivery, the number of meals delivered, charges incurred, payments and adjustments made and closing balance.

As a feature of this program, a column on the left hand side of the window lists each run, making it easy to move between runs by clicking on the name/number of the run you wish to view.

10.3.5 Transaction

A Transaction report may be useful for reconciliation on a daily, weekly or monthly basis. It is arranged by run and records for each client the number of days he/she received a delivery, the number of meals delivered, charges incurred, payments and adjustments made and closing balance.

As a feature of this program, a column on the left hand side of the window lists each run, making it easy to move between runs by clicking on the name/number of the run you wish to view.

10.3.6 Aged Debt

An Aged Debt report lists aged debt as of the chosen date. It is arranged with the client with the biggest debt at the top of the report.

10.3.7 Statistics

This report may be of most use to meals services based in Queensland. Its format is suitable for services in Queensland to submit, along with the Subsidy Report described below, in place of an MDS Report as described in Section 10.6. It may be useful for meal services in other states to check the information which will be submitted in the MDS Report since the MDS Report is not in a printable or legible format.

This report includes the client's HACC code, date of birth, gender, suburb, a sub-total for each month of meals delivered and a total for the time period chosen. The default is a six month period ending on the current date but this can be changed.

It is arranged in alphabetical order by the first letter of the clients' HACC codes.

10.3.8 Statistics (with names)

This report contains the same information as the above report plus the names of each client. This report would not be submitted to HACC but may be useful for checking and correcting the Statistics report.

10.3.9 Subsidy

As described above in Section 10.3.7, this report may be most useful to meals services based in Queensland to submit to HACC in place of an MDS Report.

It lists by month the number of clients for whom the service has received or expects to receive a HACC subsidy and the number of meals they were delivered, with a sub-total for each month and a total at the end of the report.

The information entered in the Number of Meals column is used in MDS reporting. The MDS report needs to include the number of meals served but not necessarily the components of the entire delivery. A hot meal, a frozen meal or a salad would count as a meal for MDS purposes but a dessert or a juice would not. If you want the meal item to be counted as a meal in the MDS report, enter 1, otherwise enter 0.



Please note that in the above *Statistics* and *Subsidy* reports, the figure for the number of meals delivered does not necessarily count all components of the delivery. The meal items which have a 1 next to them in the "Number of meals" column in the *Meal Items* window will each be counted as one meal (see Section 3.3).

10.4 Client Reports

10.4.1 Client List

This report lists all active clients in alphabetical order. It includes their name, address and the date they first started with your meal service.

10.4.2 Client Birthdays

Many meal services like to acknowledge their clients' birthdays. Once you have opened the *Client Birthdays* window and chosen a start date when the dialog box appears, the MealsOnDisk program will set the end date of the report for a year after the start date and generate a report. The report will give a list of clients' birthdays in chronological order starting from the date chosen and also state the age the client will be on that birthday. Obviously clients for whom you have not entered a birth date will not appear in this report.

10.4.3 Activity History

This report will be of most use to Multi-Service Organisations who provide HACC services other than meal deliveries. While all HACC services, including meal deliveries, are reported to HACC quarterly, the *MDS Report* is created in a data format which is illegible except to computer programmers. If you want to view a summary of services (HACC and otherwise) which have been provided to clients over a particular quarter, then the *Activity History* report enables you to do that. See Section 4.8.3 for information on using the *Client Activity* window.

The report is created by clicking on "Reports" on the menu at the top of the MealsOnDisk screen, then "Client Reports", then "Activity History". You will be required to choose the quarter on which you wish to create the report.

10.4.4 Activity History (non-MDS)

This report is similar to the one described above except that it only includes services provided which have not been entered as any of the HACC services included on the pull-down list on a client's *Activity* window. See Section 4.8.3 for information on using the *Client Activity* window.

The report is created by clicking on "Reports" on the menu at the top of the MealsOnDisk screen, then "Client Reports", then "Activity History (non-MDS)". You will be required to choose the quarter on which you wish to create the report.

10.4.5 Client Contacts List

This report can be used to confirm contact details with your clients. It displays a page for each Active Client, listing the client's address and telephone details, as well as the details for all their Contacts (eg family, doctor, advocate etc) as entered on the Client Contacts window (see Section 4.8.2). A large font has been used to help the clients read the page, and it has instructions to the client to check the information, mark up any changes and hand it back when their next meal is delivered.

10.5 Volunteer Reports

10.5.1 Volunteer List

This report lists all active volunteers in alphabetical order. It includes their name, address and date they started working with your meal service.

10.5.2 Volunteer Availability

This report lists by days of the week:

- volunteers,
- their preferred duties,
- which run (if any) they have been assigned to and
- whether they are on standby for that day of the week. If there is an X in that column, that volunteer is on standby.

The report will show first the volunteers who are available every Monday, then the first Monday of the month, the second Monday etc, using the details entered in the “Availability” box in each *Volunteer Details* window.

10.5.3 Volunteer Expiry

This report is designed to help you and your volunteers keep track of when their drivers licences and vehicle registrations are due for renewal. Once you have opened the *Volunteer Expiry* window and chosen a start date when the dialog box appears, the MealsOnDisk program will set the end date of the report for a year after the start date and generate a report. The report will list by the date and the type of renewal needed, using the dates which have been entered in their volunteer profile. See Sections 8.1.2 and 8.1.4.

10.5.4 Volunteer Service Anniversary

This report is very similar to the Volunteer Birthday report, described in the following section, except that it lists the anniversaries of the dates that volunteers began working with the meals service, rather than their birthdays. The report uses the start dates which have been entered in their volunteer profile. See Section 8.1.

10.5.5 Volunteer Birthday

Many meal services like to acknowledge their volunteers' birthdays. Once you have opened the *Volunteer Birthdays* window and chosen a start date when the dialog box appears, the MealsOnDisk program will set the end date of the report for a year after the start date and generate a report. The report will give a list of volunteers' birthdays in chronological order starting from the date chosen and also state the age the client will be on that birthday. Obviously volunteers for whom you have not entered a birth date in their volunteer profile will not appear in this report. See Section 8.1.

10.5.6 Volunteer Payment Summary

A *Volunteer Payment Summary* is a list of volunteers who have payment due to them and the amounts which are due. The MealsOnDisk program uses the rates which have been entered in the *Volunteer Duties* window (see Section 3.8) combined with the run length distances entered in the *Delivery Runs* window (see Section 3.1) to calculate the amount due to the volunteers. See Sections 8.2 and 8.3 for more information on Volunteer Payments

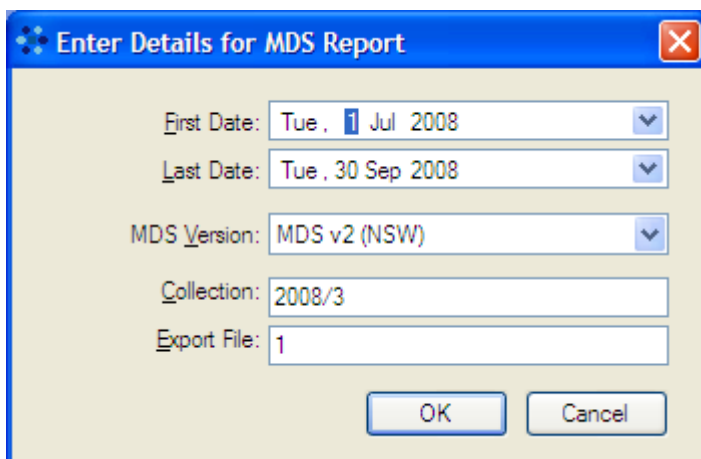
10.5.7 Volunteer Payment Statements

Volunteer Payment Statement contain the same information as a *Volunteer Payment Summary* described above, however if you create a *Volunteer Payment Statement* report, there will be a separate statement for each volunteer due to receive payment.

When you create one of these Volunteer Payment reports, it will be necessary to choose a date range which defaults to a quarter but may be changed to any range.

10.6 MDS Report

When you need to create an MDS Report file to send to HACC, open the *MDS Report* window and choose the quarter you are reporting on (the current quarter will appear by default). Collection, Export File numbers will also appear by default. There is a choice between MDS Version 1 (QLD), MDS Version 2 (NSW) and MDS Version 2 (National), which will be set by default according to the default state you have chosen in the *Clients Defaults* section of the *Options* window (see Section 2.3.3). Change these if necessary and click on OK.



The MealsOnDisk program will collate all meal delivery records which have been automatically generated by MealsOnDisk and any which may have been recorded under the *Client Activity* window (See the Information Box in Section 4.8.3) to create one report. Any other HACC services provided which were recorded under the client's *Activity* window will also be included in the report.

A compressed zip file will be produced in MDS Version 2 (NSW) format, an XML file will be produced in MDS Version 2 (National) format, or a text file will be produced in MDS Version 1 format, according to the version that was selected.



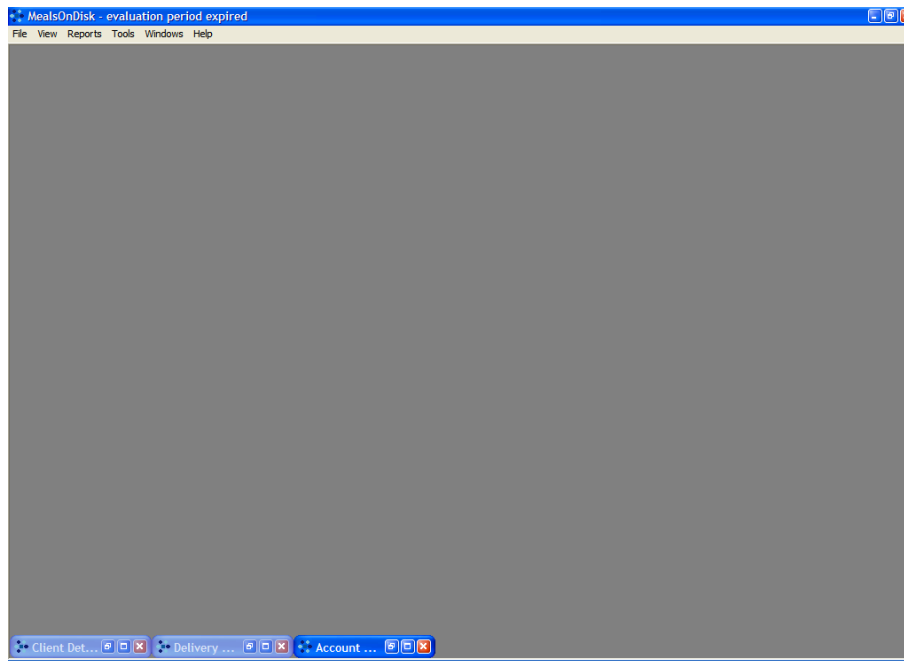
For the purpose of MDS reporting, all automatically generated meals are counted as a HACC "Meals" service with a Setting of "Home". Should you wish to differentiate in the MDS Report between meals delivered to the client's home and meals delivered to the client at a centre, the way to do this is in the client's *Activity* window. For example, if the client was served 60 meals over the quarter and 12 of those were delivered to a centre, you could type "12" in the "Meals at centre" field and "-12" in the "Meals at home" field. The differentiation would appear only in the MDS Report and in the Activity History Report. See Section 4.8.3 for more information on using the *Client Activity* window.

11 Windows

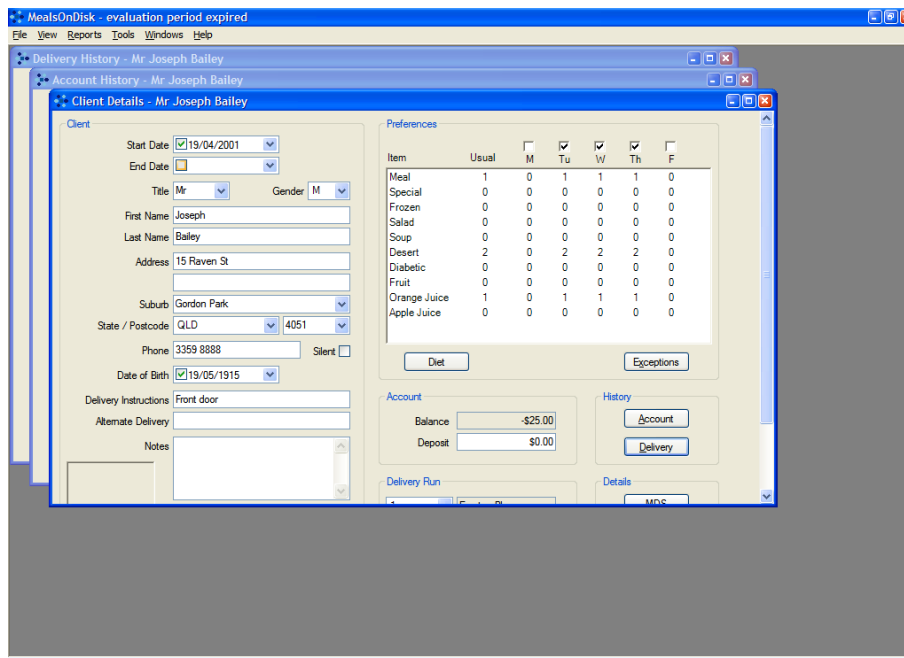
When you click on “Windows” on the menu at the top of the screen, the section below the line on the drop-down menu will list the windows which you currently have open.

Above the line will be four options for arranging these windows. Clicking on:

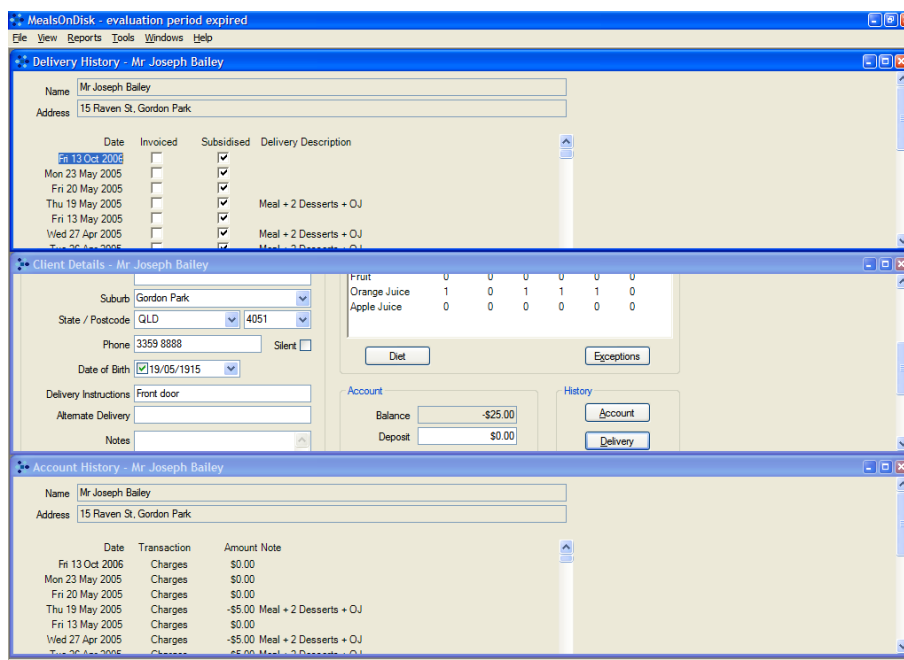
Arrange Icons allows you to move icons (or minimized windows) to the bottom of the MealsOnDisk screen. When you minimise an open window, an icon will appear at the bottom of the MealsOnDisk screen.



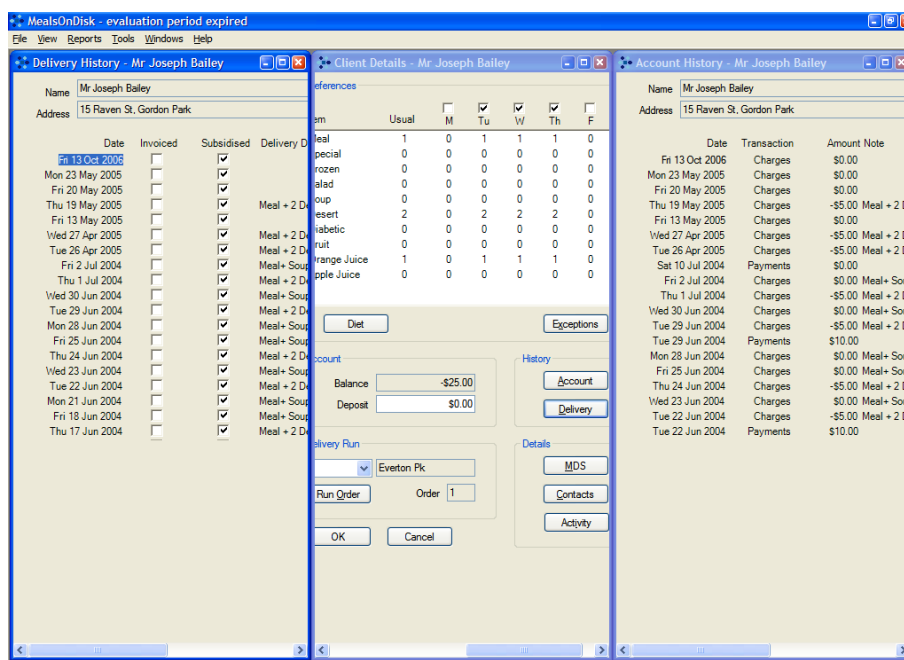
Cascade will make the windows appear as below:



Tile Horizontal will make the windows appear as below:



Tile Vertical will make the windows appear as below:



The arrangement chosen will remain only while those particular windows are open. When the program is closed and reopened, the windows will revert to the default arrangement.

Open windows can also be moved to different positions on the MealsOnDisk screen by clicking on the blue bar at the top of the window, holding down the mouse button and dragging the window to the desired position.

12 Database

MealsOnDisk stores all information, including setup, client, delivery and volunteer information, in a database. MealsOnDisk provides several database menu options.

The following sections refer to the MealsOnDisk backup folder. This is a folder named "Backup" which is located under the folder in which MealsOnDisk was installed. Typically, the full path of the MealsOnDisk backup folder will be:

C:\Program Files\CommunityTech\MealsOnDisk\Backup

12.1 Backup Files

There are several different ways in which database backup files are created.

- **Automatically when MealsOnDisk is closed**
Whenever MealsOnDisk is closed, you will be asked if you wish to make a backup. If you answer yes, a backup will be made automatically and saved in the file "backup.dat" in the MealsOnDisk backup folder. If this file exists it will be overwritten.
- **Automatically when MealsOnDisk is upgraded**
Whenever you first use a new version of MealsOnDisk, that requires an upgrade of the database, MealsOnDisk will automatically create a backup before the upgrade starts. This is done as a precaution in case you wish to revert to the previous version of MealsOnDisk. The backup file will be saved as "upgrade-2_xx_yyyy_zzzzz.dat" in the MealsOnDisk Backup folder. "2_xx_yyyy_zzzzz" is the full version number of the MealsOnDisk, prior to the upgrade.
- **Automatically when the MealsOnDisk database is restored**
Immediately prior to restoring from a backup file, MealsOnDisk will automatically make a backup. The automatically created backup file will be saved to the MealsOnDisk Backup folder and will be given a name "restore-yyyymmdd-hhmmss.dat", where "yyyymmdd" and "hhmmss" represent the date and time that the backup was made. This automatically created backup file is like any other backup file and can be restored if required.
- **Manually as described in the following section**
MealsOnDisk includes a menu option so that a backup can be made at anytime. You can select any filename you like, and it does not necessarily have to be saved to the MealsOnDisk Database folder.

12.2 Database Connection



All windows must be closed in order to display the database connection window. If you are setting up the server computer, you should ensure that MealsOnDisk is not running on any other computers at this time.

As mentioned previously, MealsOnDisk stores all information in a database. The database connection window is used to tell MealsOnDisk how to access its database.

When MealsOnDisk is first installed, these values are set up automatically. They generally do not need to be changed unless you use MealsOnDisk from more than one computer.

When MealsOnDisk is installed, the database is also installed. However, if MealsOnDisk is installed on several computers on the same office network, you will generally only want to have one database.

The computer that contains the database will be referred to as the server computer. All other computers that access the database on the server will be referred to as client computers.

Although there will only be one server computer, there is no restriction as to how many client computers can connect to the database on the server.

In order for the database on the server to be accessed from other computers, the server and client computers must be on the same network. In addition, any firewalls must be configured to allow communication between those computers. Refer to Section 14 for more information on setting up firewalls.



The client computers will only be able to access the MealsOnDisk database if the server is running. You do not need to be running MealsOnDisk on the server computer, and you do not need to be logged in, but it needs to be switched on. To provide the best performance, it is recommended that you select the computer with the most memory (RAM) and the fastest processor (CPU), to be the server computer.

The Mode section indicates how MealsOnDisk accesses the database.

When MealsOnDisk is first installed, neither the Client Only nor the Networked boxes are ticked. This indicates that the database is running on the same computer as the MealsOnDisk application, and that the database is not accessible from other computers on the office network.

If the database is on another computer, the Client Only box should be ticked. This will cause the Networked box to be greyed out, as it is not applicable for client computers. It will also allow you to type in a Server Name (see below), and the Workstation ID field will be changed to the network name of the computer. It will also grey out the Authentication section, setting it automatically to SQL Authentication.

If the computer is operating as the server, that is, the database is on this computer and it is to be accessible from other computers on the office network, then the Network box should be ticked. If the Networked box is changed, then the database will be restarted once this window is closed.

The Database section lets MealsOnDisk know whether the database is located, and how to connect to it. If the database is on the same computer, then the Server Name field is set to “(local)” and cannot be changed.

Service Name and Database Name are both set to “MealsOnDisk” by default, and will generally not need to be changed.

Workstation ID indicates to the database which computer is connecting to it. By default, it is set to “Local” for a single computer or a server computer, and is set to the network name of the computer if it is a client.

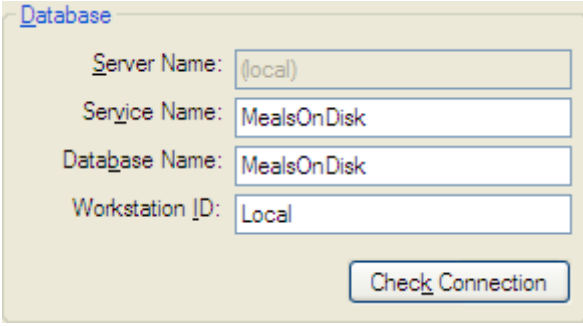
If you change any of these names, you can click on Check Connection to check whether MealsOnDisk can connect to the database using the new settings.

The database includes security to restrict access to authorised users. There are two types of authentication. The first is Windows Authentication which relies on the Windows login process to authenticate the user. If SQL Authentication is chosen, MealsOnDisk uses a built-in method of authentication. SQL Authentication must be used from client computers, or from any computer running Windows 98 or Windows ME.

Timeout values are specified so that MealsOnDisk does not wait indefinitely to access the database. The default values are 5 seconds to connect to the database, and 30 seconds to perform a database backup or restore.

Unless your network is very slow, it is unlikely you will need to increase the Connect timeout. However, as the database grows backup or restore of the database may take more than 30 seconds. If this occurs, the timeout should be increased.

Timeout values can be typed in, or the up/down arrows can be used to change the values in increments. The Connect Timeout increment is 5 seconds, and the Backup/Restore Timeout increment is 30 seconds.



Database


Server Name: (local)

Service Name: MealsOnDisk

Database Name: MealsOnDisk

Workstation ID: Local

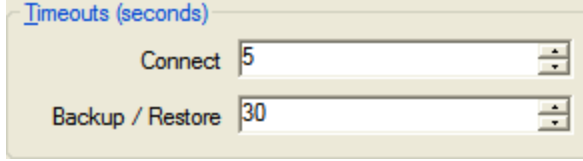
Check Connection



Authentication

Windows: ☒

SQL: ☐



Timeouts (seconds)

Connect 5

Backup / Restore 30

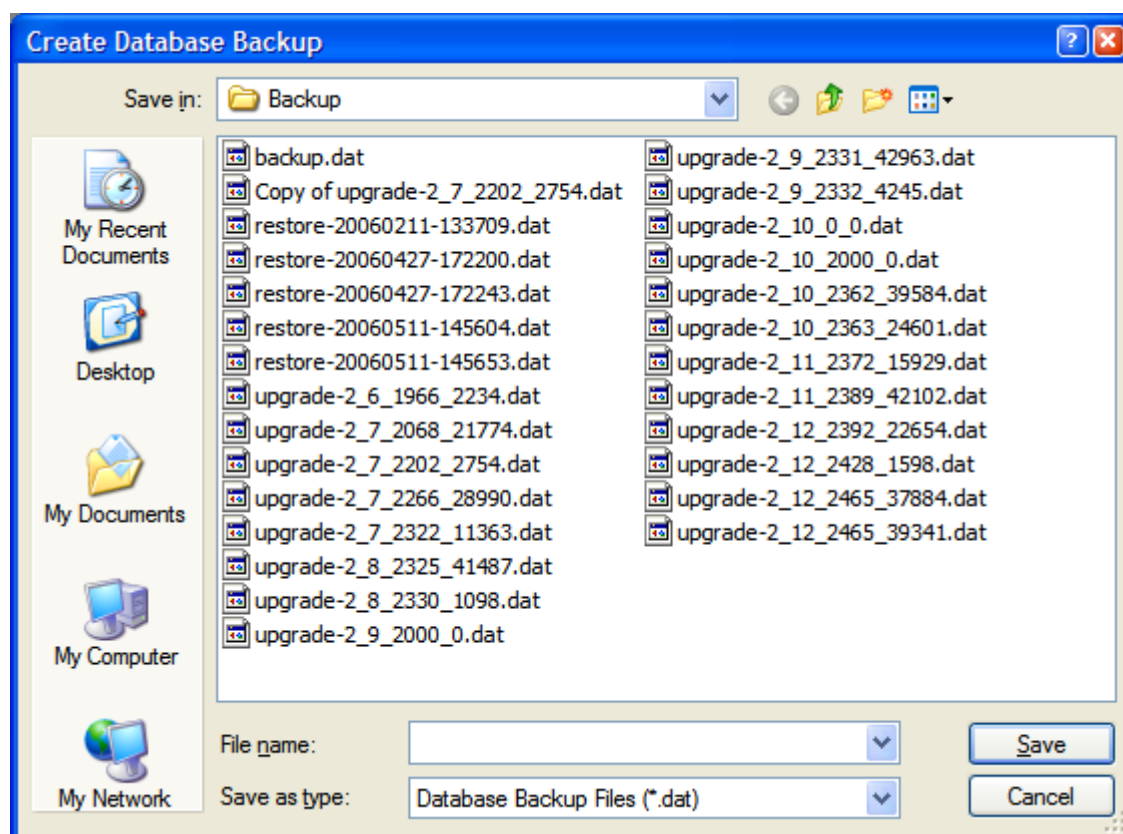
12.3 Database Backup



Please note that the database backup function writes a copy of the MealsOnDisk database to the MealsOnDisk Backup folder on your computer's hard disk. To protect your data, these backup files should be copied to some other form of storage that is not on your computer. This would ideally be a CD, DVD or memory stick that can be taken off the premises, providing protection from fire and theft, as well as hardware failure.

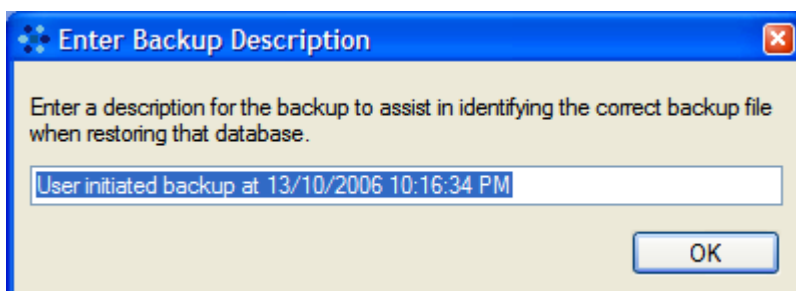
This function makes a backup copy of the MealsOnDisk database, which can be used to recover from hardware failures, or data errors. The Database Backup window will initially show the contents of the MealsOnDisk Backup folder. Although you would usually save backups in that folder, you can select any folder on your computer, if required.

The Database Backup window will show all files ending with ".dat", which is the extension typically used for database backup files. To create a database backup, you need to enter a name for the file. The ".dat" extension will be added automatically.



Most of the database backup files that are already saved in the MealsOnDisk Backup folder have been created automatically. Section 12.1 provides more information about the different types of backup files.

Once you have chosen a name for the database backup file, you will be prompted to type in a description of the backup. This description will be displayed when you select that file to be restored (see Section 12.4) and may help to confirm whether you have selected the correct backup file to be restored. MealsOnDisk will suggest a description that indicates the date and time the backup was made, but you can change this to be any description that you want.

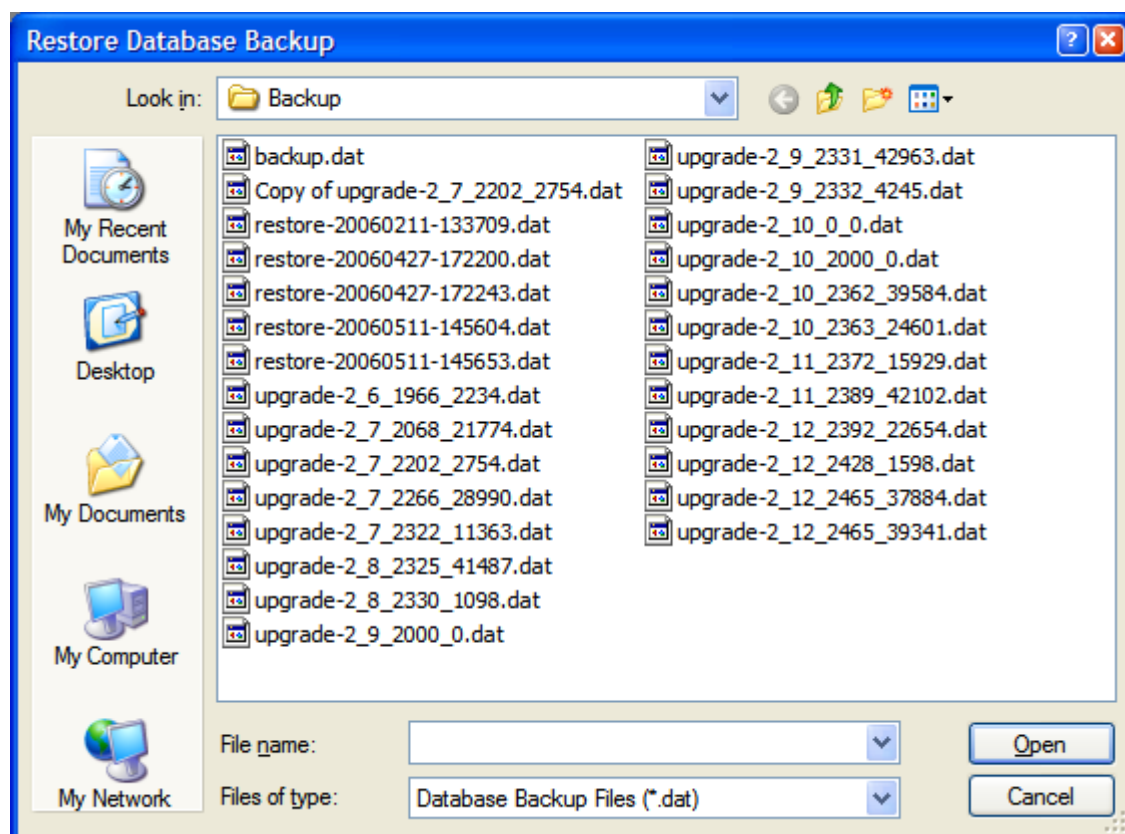


12.4 Database Restore

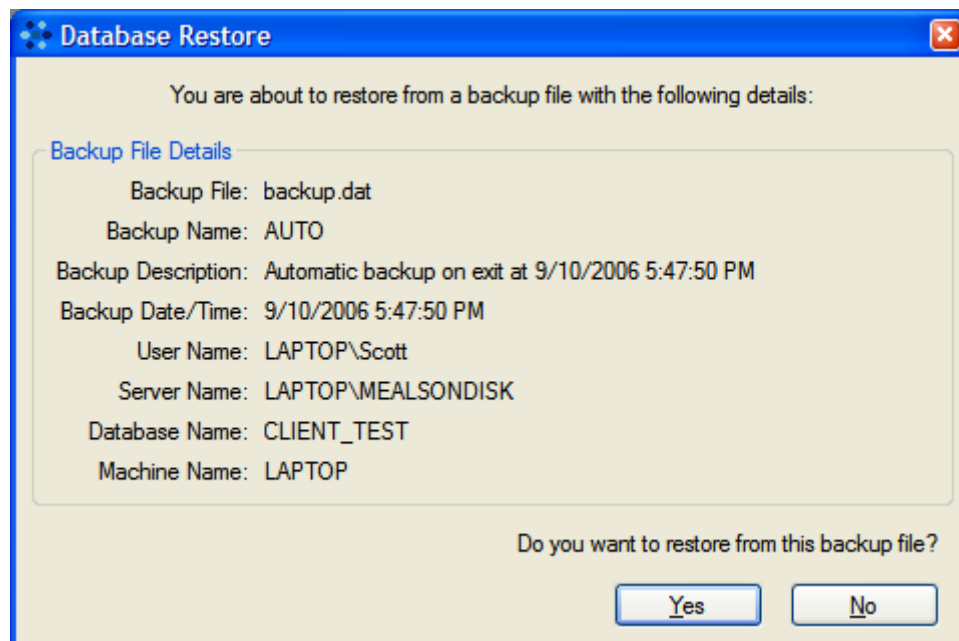


All windows must be closed in order to restore the database. If you have an office network, and more than one computer can run MealsOnDisk, you should ensure that MealsOnDisk is only running on one computer before performing a database restore.

This function allows you to restore the database from a backup file. You will need to select the backup file that you want to restore. The window will show the MealsOnDisk Backup folder, but you can select from any folder on your computer.



Once you have selected a backup file to restore, you will be shown details of that backup file, including the date and time the backup was made. You will be asked to confirm whether you wish to proceed with restoring the database.



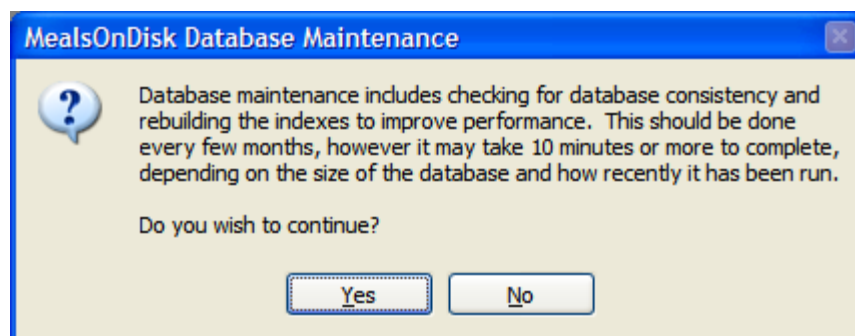
Please note that any changes made since the backup was made will be lost. As a protection, MealsOnDisk will automatically make a backup immediately prior to restoring from the selected backup file. The automatically created backup file will be saved to the MealsOnDisk Backup folder and will be given a name "restore-yyyymmdd-hhmmss.dat", where "yyyymmdd" and "hhmmss" represent the date and time that the backup was made. This automatically created backup file is like any other backup file and can be restored if required.

12.5 Database Maintenance



All windows must be closed in order to perform database maintenance. If you have an office network, and more than one computer can run MealsOnDisk, you should ensure that MealsOnDisk is only running on one computer before performing database maintenance.

Database maintenance checks the integrity of the MealsOnDisk database, and rebuilds all the database indexes. This can 5 to 10 minutes to complete, but may result in a substantial increase in performance, particularly for large databases. It is recommended that database maintenance is performed every few months.



12.6 Remove Details

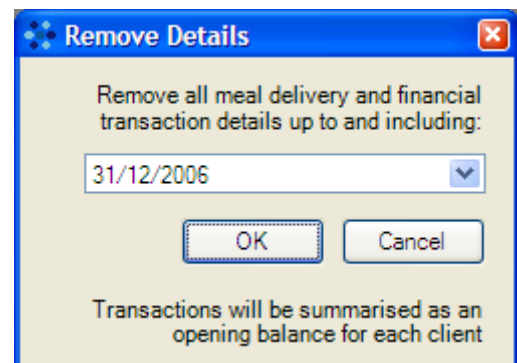


All windows must be closed in order to remove database details. If you have an office network, and more than one computer can run MealsOnDisk, you should ensure that MealsOnDisk is only running on one computer before removing details.

MealsOnDisk maintains historic details of deliveries, charges, payments and adjustments for all clients. As you continue to use MealsOnDisk more information will be stored in the database. If you have been using MealsOnDisk for several years, you may find that the amount of information stored results in slower operations and larger backup files. To improve this situation, you can remove details of these transactions.

In order to remove transaction details you need to specify a date. All delivery, charge, payment and adjustment details up to, and including, that date will be removed.

Financial transactions will not be completely lost, because the details that are removed will be summarised as a single opening balance adjustment transaction for each client. The date you have selected will be used as the date of the opening balance transaction.



When transactions details are removed from the database, all records of the meals delivered are removed. This information is used for MDS reporting, so it is important not to remove any details for periods that have not yet been reported. For this reason it is not possible to remove details that are less than 6 months old.

After transaction details have been removed, it is recommended that Database Maintenance (see Section 12.5) is performed to improve database performance.

13 Help

13.1 Contents

A help file can be displayed by selecting *Contents* on the Help menu. The Help window includes options to search by section headings, index or word search.

13.2 User Guide

The MealsOnDisk User Guide can be opened by selecting *User Guide* on the Help menu. However, this menu option will only be available if the User Guide is located in the MealsOnDisk installation folder. The latest User Guide can be downloaded from www.mealsondisk.com/update.

The MealsOnDisk User Guide is an Adobe Acrobat file, and Acrobat Reader needs to be installed in order to view the User Guide. Adobe Acrobat can be obtained from www.adobe.com, or from the MealsOnDisk CD.

13.3 Support

There are three options under the Support menu. They are as follows:

- MealsOnDisk Website
- Remote Access
- Database Commands

Each of these are available manually, either via a web browser or the command prompt, but are provided here to simplify the process of offering support to users of MealsOnDisk.

13.3.1 MealsOnDisk Website

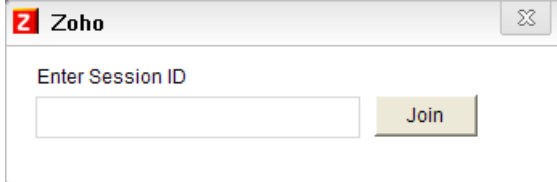
Updates to MealsOnDisk can be downloaded from our website at www.mealsondisk.com. This menu option simply opens your web browser and go to that website. From there you can be directed to the Update section from where you can download the latest version of MealsOnDisk, and this User Guide.

13.3.2 Remote Access

In order to provide higher levels of support, we are now using an internet-based method for providing remote access support. This allows the support technician to view and even control your screen to diagnose and correct any problems you may be having.

To make best use of this feature you will require an active broadband internet connection on your computer.

When you select this menu option you we see a small window.



The support technician will ask you to enter a 9 digit Session ID. Soon after you click “Join” you will join the support session and the technician will be able to view your screen. You will also be prompted to allow the technician to control your computer.



Please ensure that you only join a support session with a genuine support technician from MealsOnDisk. Calls from people pretending to be support technicians are becoming more common, and are a common form of scam.

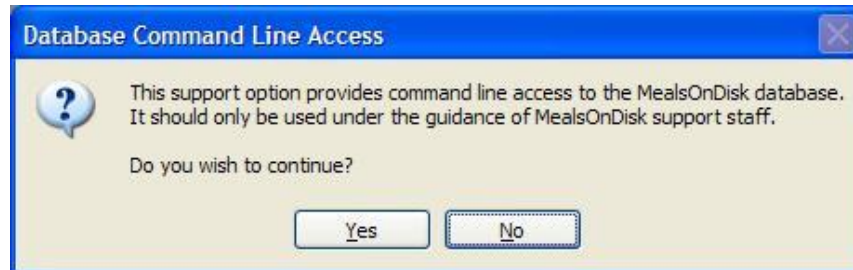
13.3.3 Database Commands

In some cases, database commands may need to be run on your MealsOnDisk database in order to investigate or rectify a problem.

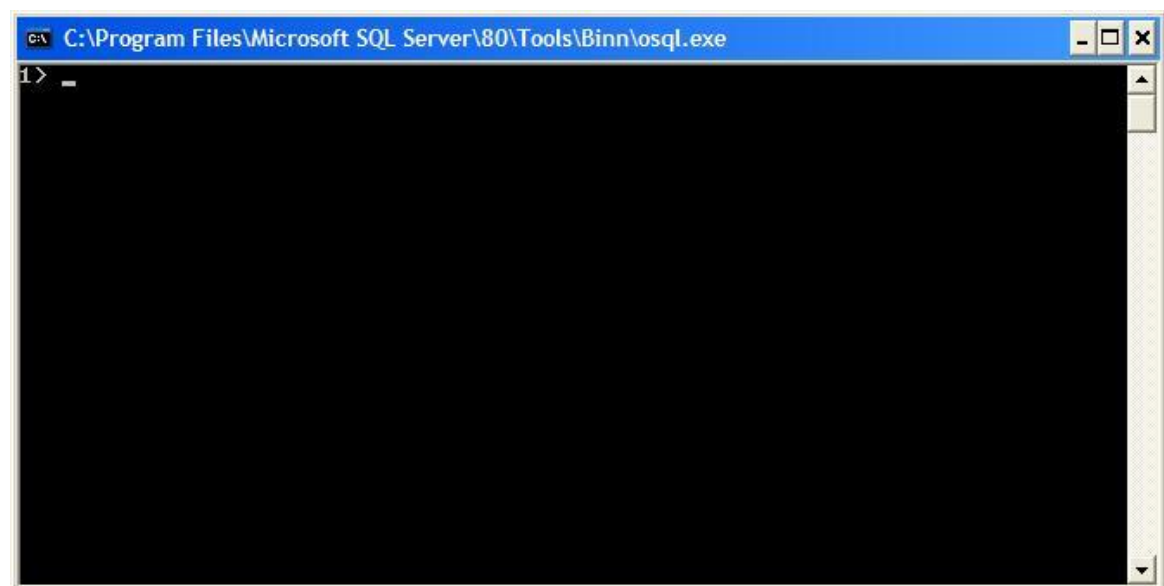


This menu option provides low level access to the database, and it is possible to lose data if used incorrectly. Therefore it is strongly recommended that this menu option should only be used under the direction of MealsOnDisk support staff.

Once you select this command, you are asked to confirm that you want to continue.



If you agree to continue, a command window will be shown which allows database commands to be entered to test or modify the MealsOnDisk database.

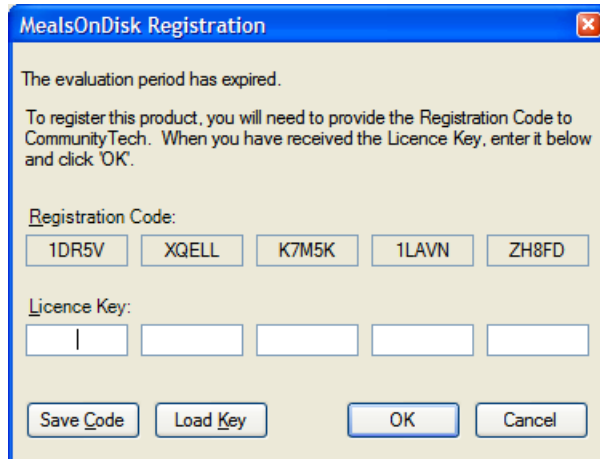


13.4 Register

This is the window used to enter the Licence Key which you will receive from CommunityTech when you make a decision to purchase the MealsOnDisk program. The registration code needs to be sent to CommunityTech in order for the Licence Key to be generated. A separate Licence Key is required for each computer running MealsOnDisk.

One of the easiest ways to send the Registration Code is to click on the Save Code button. This will save the Registration Code to a file, along with some other information about your computer. This file can then be emailed to licence@mealsondisk.com. A Licence Key will be generated and returned by email in an attachment. The attachment

should be saved on the computer and then loaded into MealsOnDisk with the Load Key button.



The evaluation period has expired.

To register this product, you will need to provide the Registration Code to CommunityTech. When you have received the Licence Key, enter it below and click 'OK'.

Registration Code:

1DR5V XQELL K7M5K 1LAVN ZH8FD

Licence Key:

|

Save Code Load Key OK Cancel

Once a valid Licence Key has been entered it can be viewed at any time on this window. This window will also indicate whether MealsOnDisk is in evaluation mode or if it is licensed.

13.5 About

The *About* window shows the full version number of the MealsOnDisk program which you are using, copyright details and a weblink. You may need to refer to this window if you are seeking support for MealsOnDisk.



14 Firewall Setup

Firewalls are designed to provide your computer with protection from attacks from the internet. They do this by blocking unwanted network access to and from your computer. However, in order to use MealsOnDisk from more than one computer, you will need to set up all firewalls so that MealsOnDisk can access the database on the server computer.

The technical requirement is that all firewalls must be configured to allow network connections on **TCP port 1433** between all MealsOnDisk clients and the MealsOnDisk server computer.

Networking equipment such as routers and broadband modems often include a firewall as well, however they are usually only restrict connections between computers on your office network, and the internet. Set up of firewalls on networking equipment is not covered in this user guide. If you need further assistance without networking equipment you should consult your computer network technician.

The remainder of this section provides step by step details for two of the more popular firewall applications for Windows – Windows Firewall and McAfee Firewall. Similar steps should be taken for any other firewall application running on your computers.



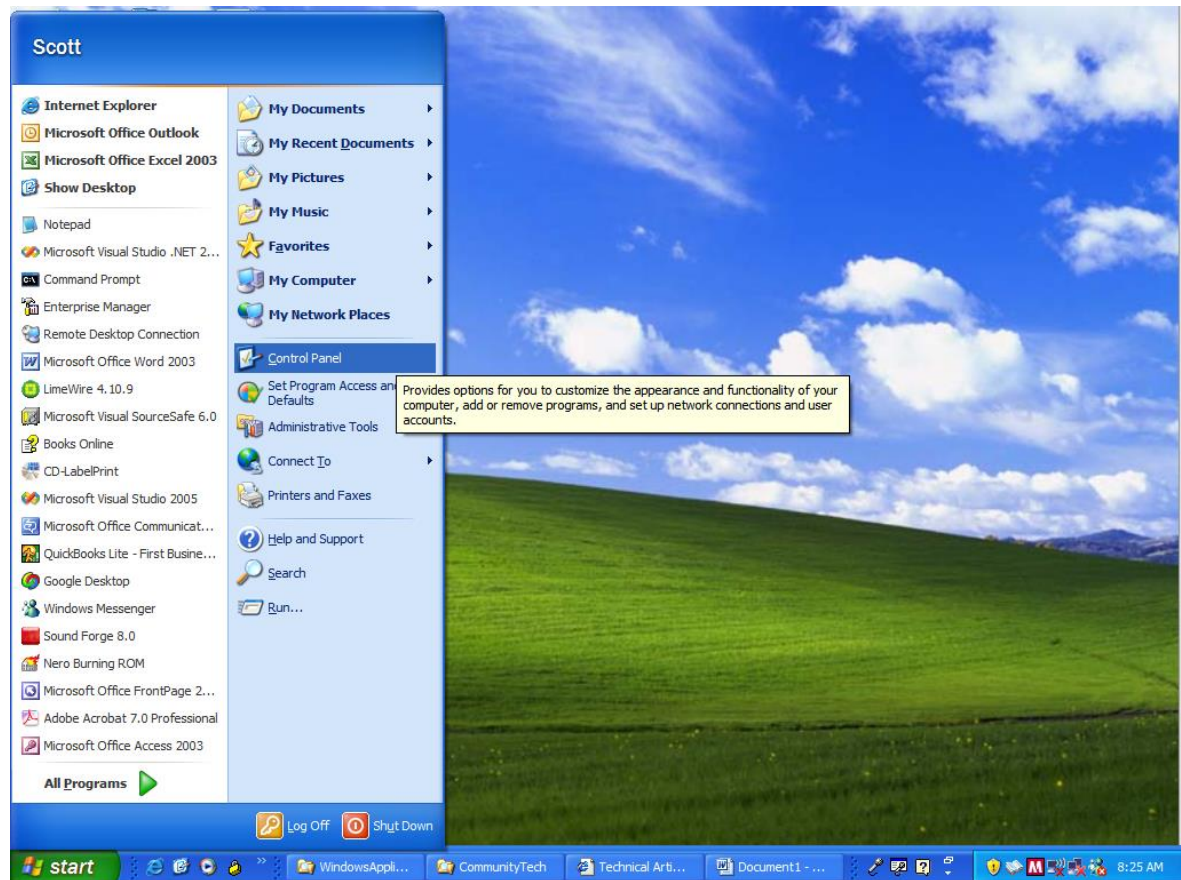
Please note that it is possible that more than one firewall is running on your computer. Windows Firewall can run automatically on Windows XP, and while other firewall products will usually turn Windows Firewall off when they are installed, this does not always occur.

14.1 Windows Firewall

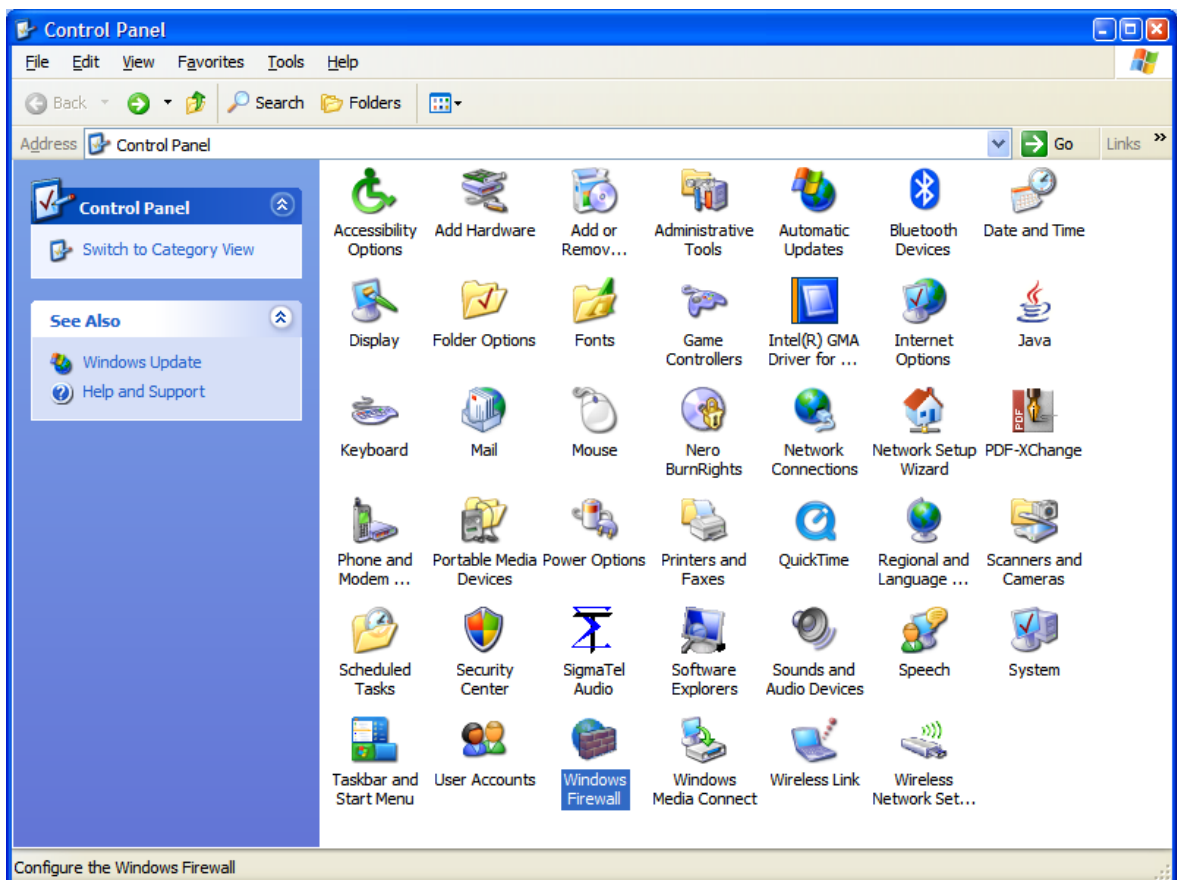
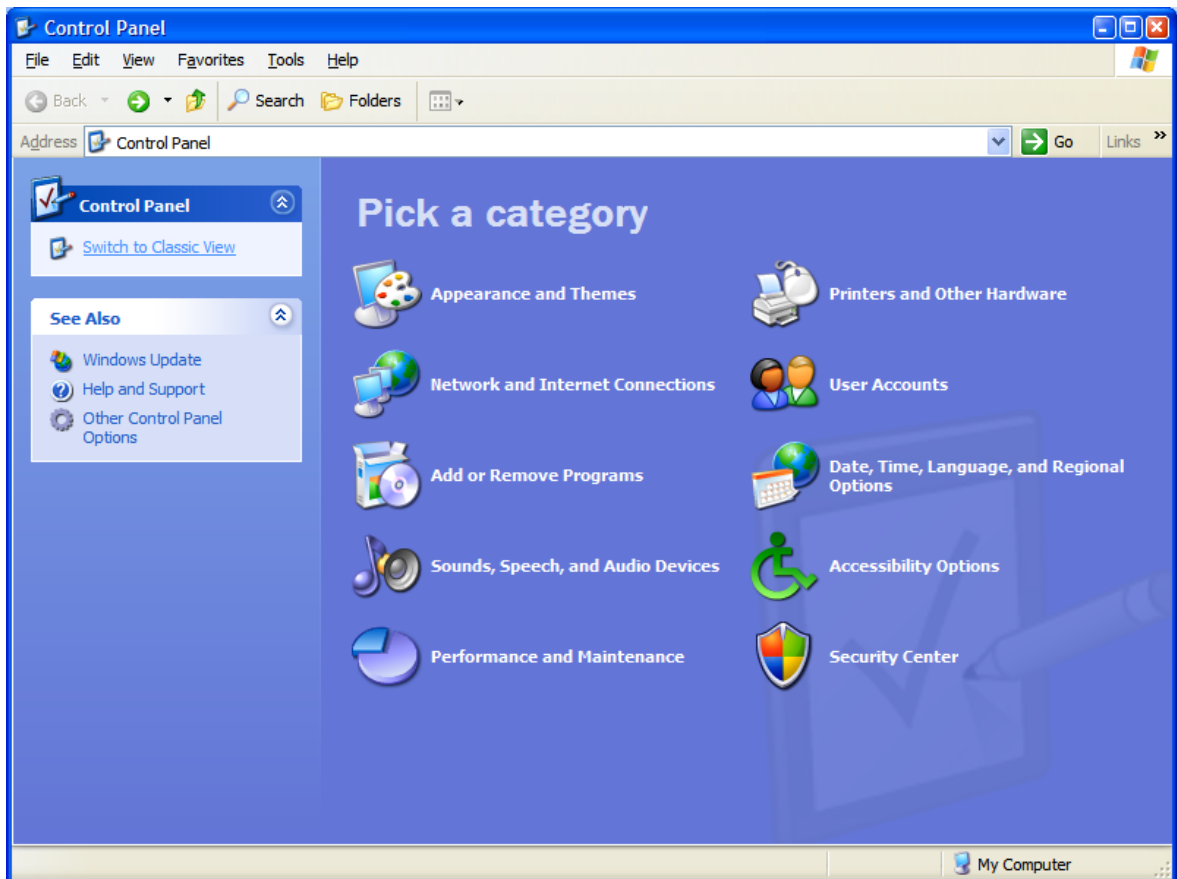
Windows Firewall is installed and configured to run automatically as part of the security improvements in Windows XP Service Pack 2 (SP2). Most new computers are running Windows XP SP2, and the Service Pack 2 update has been widely distributed on CD and

via download. As a result, most computers running Windows XP will be operating Windows Firewall.

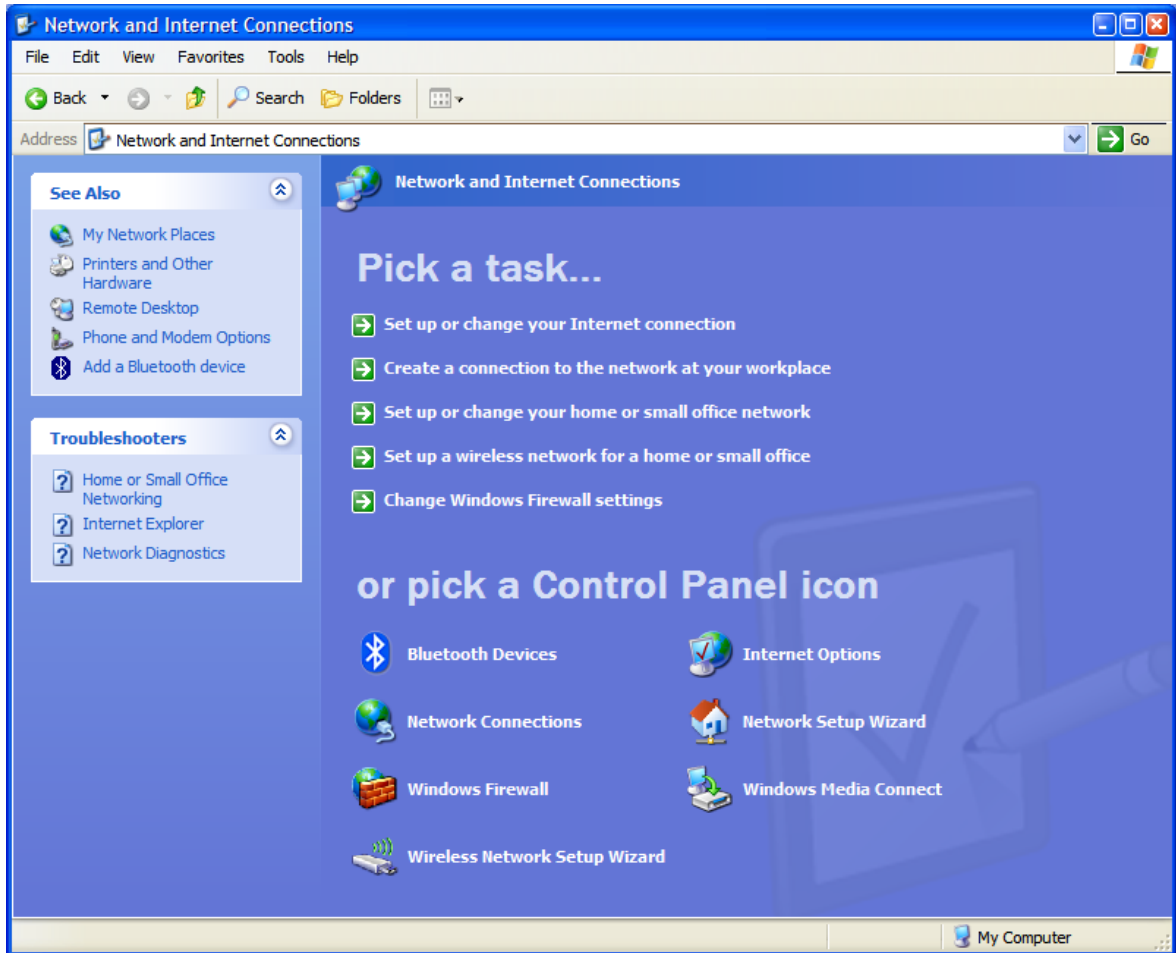
The Windows Firewall is set up from Control Panel. Control Panel is found on the Windows Start menu as indicated below.



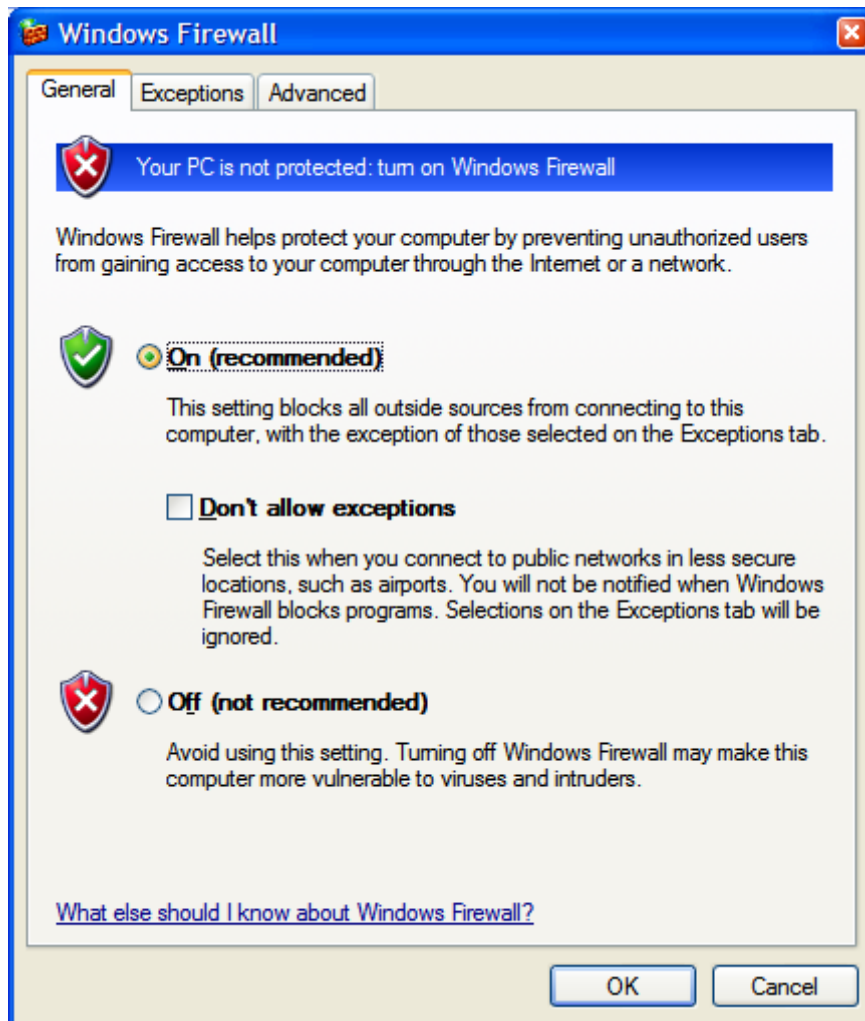
There are two different views available in Control Panel – the Category View and the Classic View. Depending which view you have selected, the Control Panel will look similar to one of the following.



If you see a window similar to the first of the last two pictures, you are using the Category View. Select Network and Internet Connections, and the following will be shown.



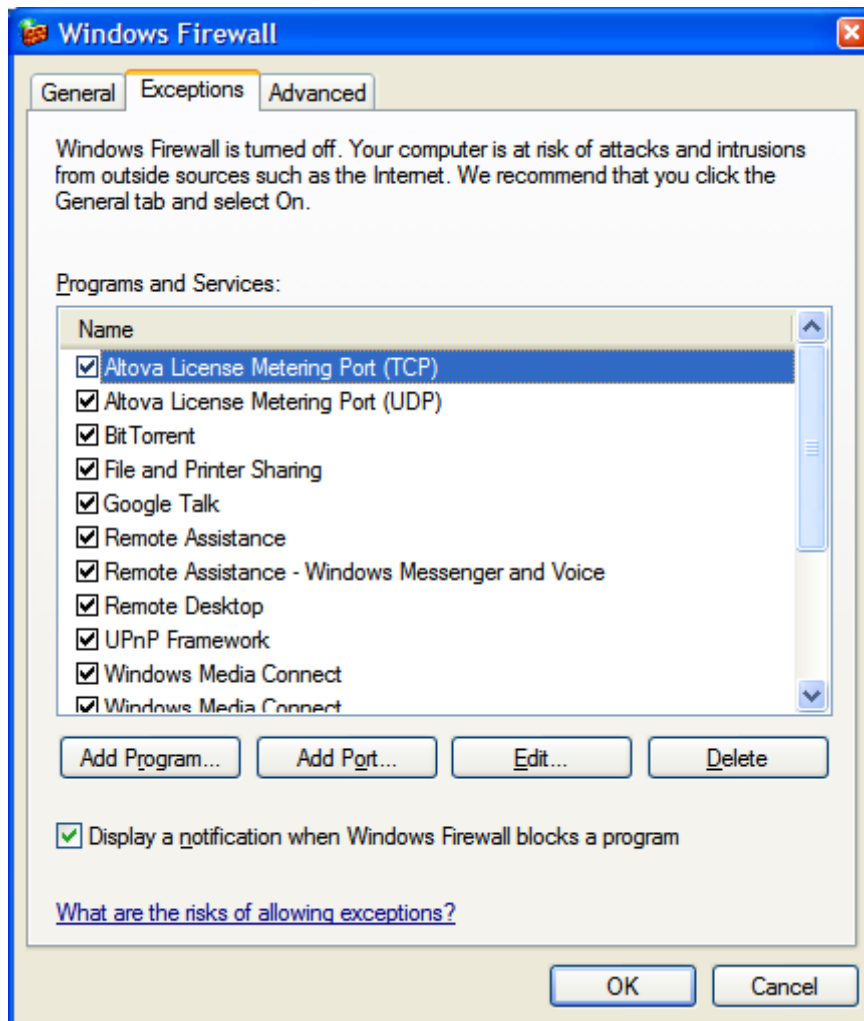
From this window, click on Windows Firewall. The icon looks like a globe behind a brick wall. If Control Panel displays in the Classic View, you can select the same Windows Firewall icon directly from that view.



If the Windows Firewall is turned on, this should not be changed unless you are confident that the computer is protected by another firewall product. If so, then that firewall must also be configured in a similar way to allow network connections using TCP port 1433.

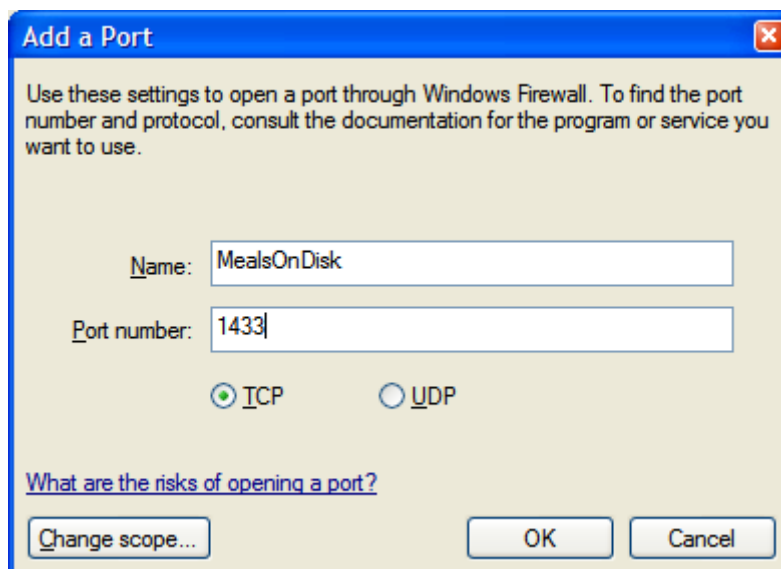
Windows Firewall provides your computer with protection from attacks from the internet. However, an exception must be made to allow computers on your local office network to access the MealsOnDisk database.

Click the Exceptions tab at the top of the Windows Firewall window shown above.

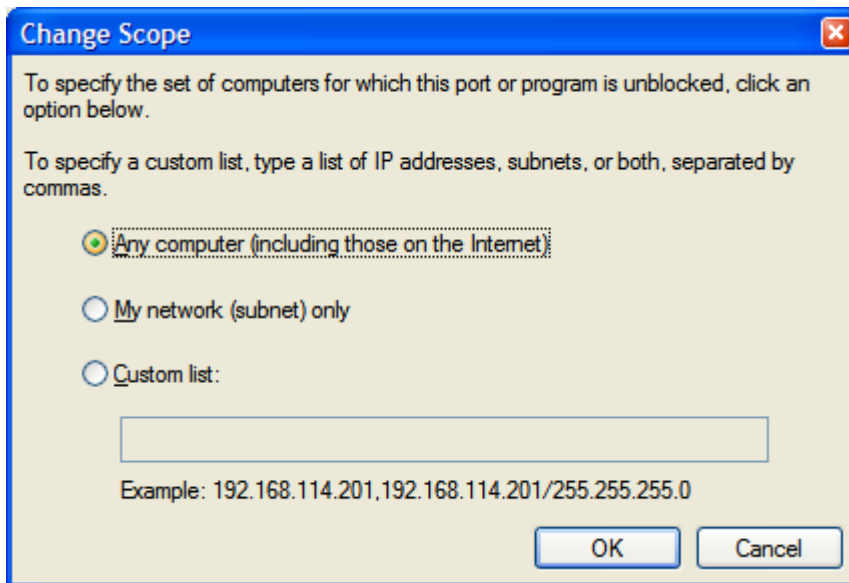


The Exceptions tab lists any connections that are allowed by Windows Firewall. In order to allow connections to and from the MealsOnDisk server computer, an exception will need to be added. Click Add Port to add the new exception.

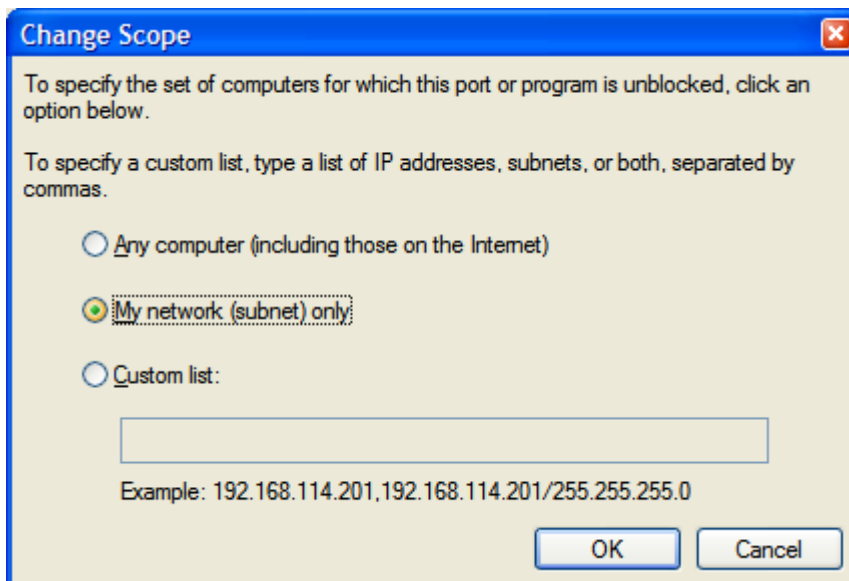
Set up the exception as shown in the following picture. Before clicking OK, you should click the Change Scope button.



Normally, the scope of any new exception will be to allow connections of that type from any computer, including those on the internet. The following picture indicates this.



However, to provide better security, this should be changed to only allow connections of this type from computers on your office network. This is done by the selecting the second option, My Network. Click OK to continue, and then click OK again to create the new firewall exception.



Once you are back at Windows Firewall Exceptions tab click OK again, for the new setup of Windows Firewall to take effect.



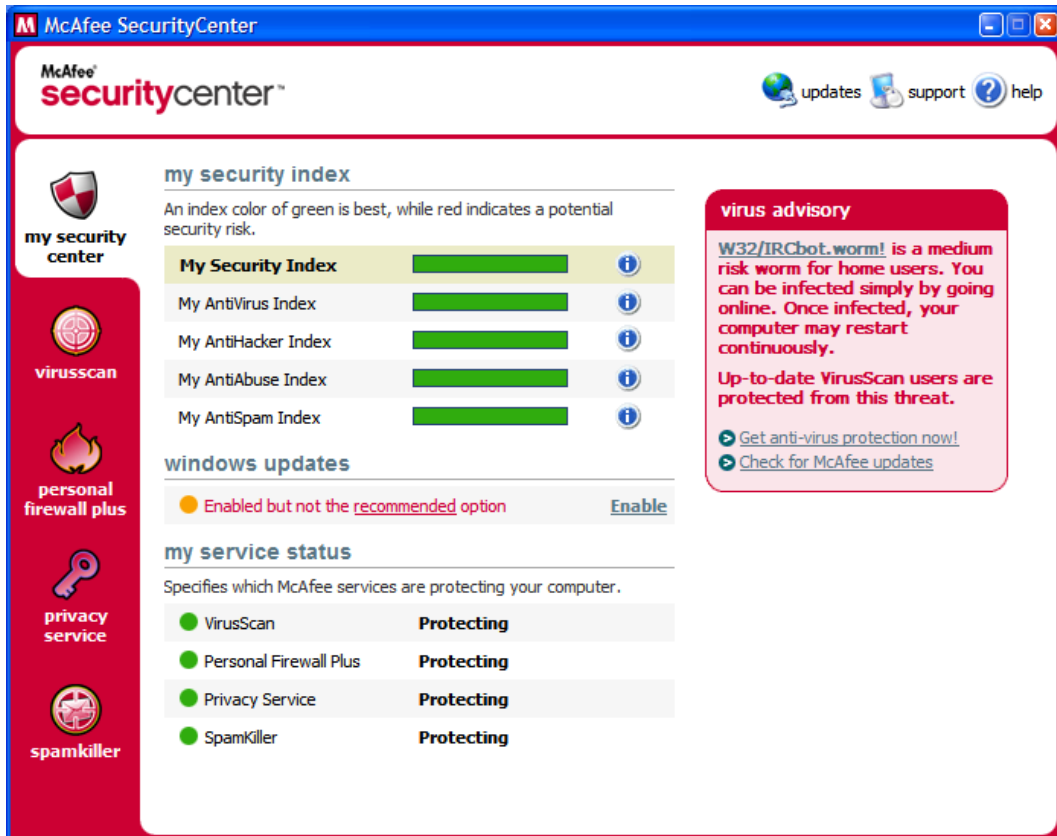
Please note that firewall settings need to be set up on all MealsOnDisk client and server computers to allow access to the MealsOnDisk database. It should not be necessary to restart your computers for these new firewall settings to take effect, however if you are still having problems you may wish to try restarting the computers.

14.2 McAfee Firewall Setup

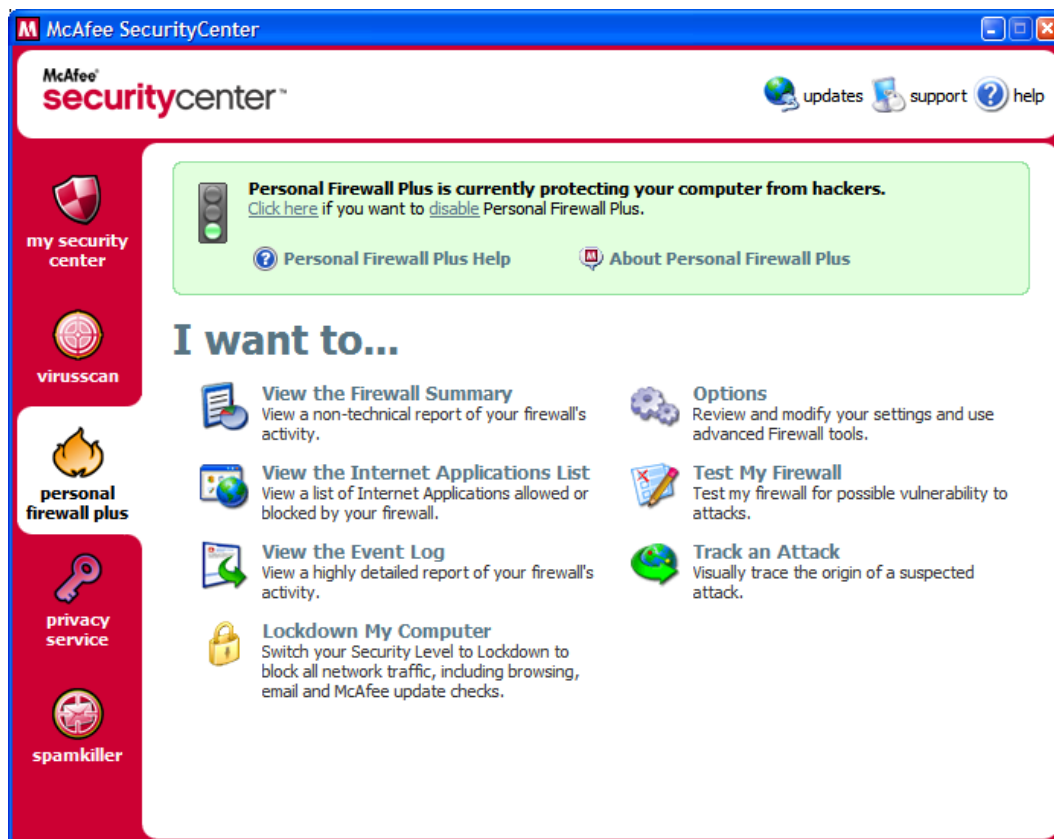
To set up the McAfee Firewall, you need to first start the McAfee Security Center. This is available under All Programs on the Windows Start menu, or from the M icon in the system tray at the bottom right hand side of the screen, as shown below.



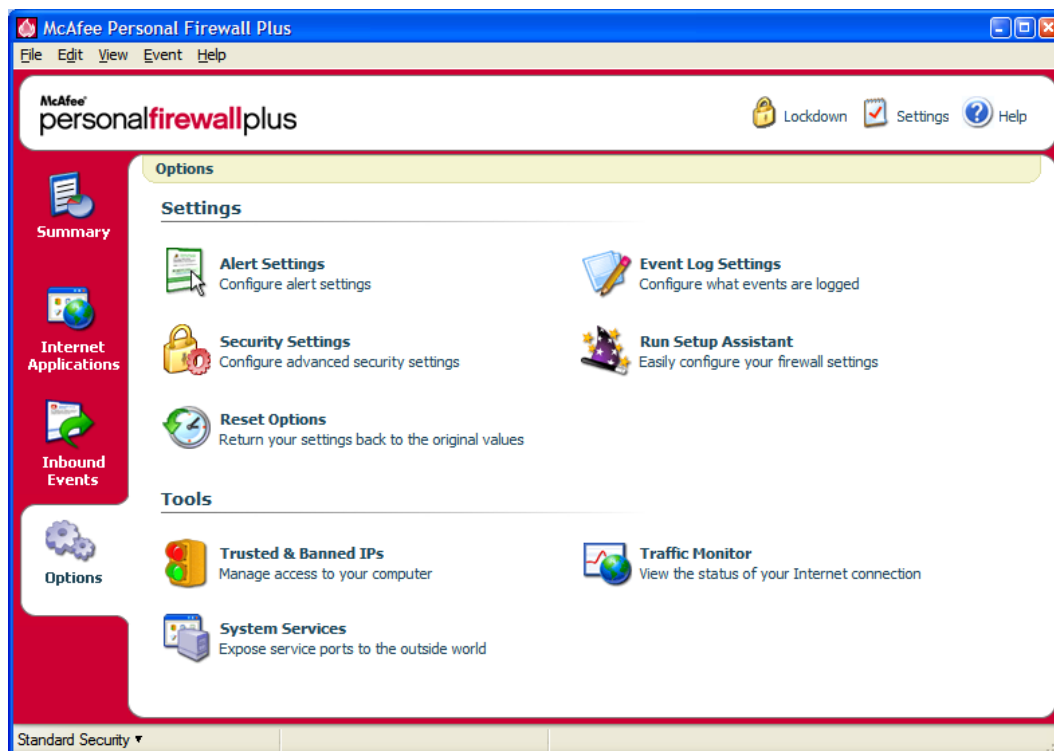
The McAfee Security Center displays windows like this. Select the third icon down the left hand side of the window that looks like a flame to set up the firewall.



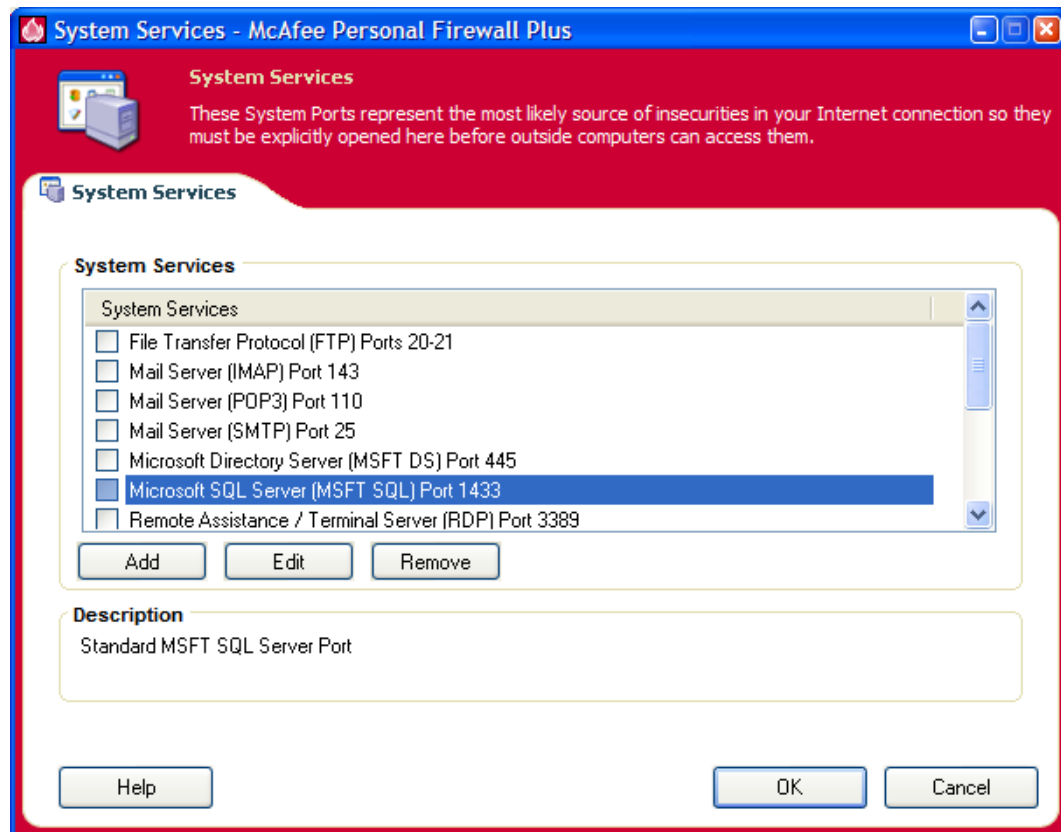
Next, you will need to click on the Options icon. It is located on the right hand side of the McAfee Firewall window, and looks like two grey gears.



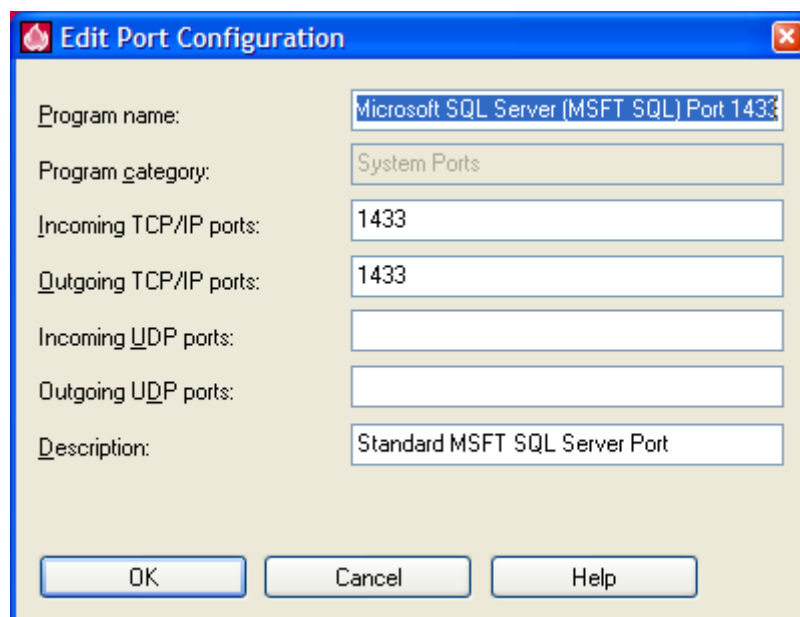
From the McAfee Firewall Options window, select System Services. This is where you set up which network connections are allowed by the firewall.



You may find that the McAfee firewall has already discovered that you require access through the firewall, and has set up the access as shown below.



If it is already there, you should still check that it is set up as shown below. If not, you should add a new system service manually. The Program Name and Description used are not important, and you may choose to use “MealsOnDisk” in both fields, rather than the long descriptions that have been added automatically here.



Once this has been completed, you can click OK on each window until all McAfee windows are closed. At that point the new setup of McAfee Firewall should take effect.



Please note that firewall settings need to be set up on all MealsOnDisk client and server computers to allow access to the MealsOnDisk database. It should not be necessary to restart your computers for these new firewall settings to take effect, however if you are still having problems you may wish to try restarting the computers.