



# WEBINAR

## Genesis R&D Foods Tips for Success Organizing Your Recipes & Ingredients

**Presented by ESHA Research**

Wednesday, Sept 15, 2021

11:00 AM PDT | 1:00 PM CDT | 2:00 PM EDT



# ESHA Research

ESHA Research was established in 1981 as one of the very first nutrition software solutions. Today, ESHA's suite of nutritional software products, services, and databases are recognized as the industry's top choice for food and supplement formulation, recipe development, labeling, nutritional analysis, and regulatory compliance.

## **ESHA Solutions**

- Genesis R&D® Food Formulation
- Genesis R&D® Supplement Formulation
- Food Processor® Nutrition & Diet Analysis
- Consulting Services

Our mission is to help remove the complexity of product development and regulatory compliance for the food, beverage, and supplement industries through software, services, and nutritional databases.



# Genesis R&D Foods

Genesis R&D Foods, first released in 1991, is designed to help users manage processes, overcome industry challenges, and meet federal requirements. Industry professionals use Genesis R&D for quick and accurate nutrient evaluation, virtual product development, nutrition labeling, and regulatory compliance.

- Product Development
- Formulation Analysis
- Menu Analysis
- Reporting
- Regulatory Compliance





# Upcoming Webinars

## **October 20, 2021 | Tips for Success: Searching for Recipes & Ingredients in Genesis R&D Foods**

Genesis R&D Foods offers many filters to narrow your searches, helping you find exactly what you are looking for. When developing a recipe, you may want to search for ingredients by specific nutrient content, such as high in protein or low in saturated fat. Alternatively, you might want to find recipes that contain a particular ingredient. This webinar covers the different database search filters and other searching tips.

## **TBA!| Genesis R&D Foods Version 11.11 Update Overview**

The latest update of Genesis R&D Foods, Version 11.11, is coming soon! During this webinar we will cover the newest features and program enhancements. Stay tuned for more information!

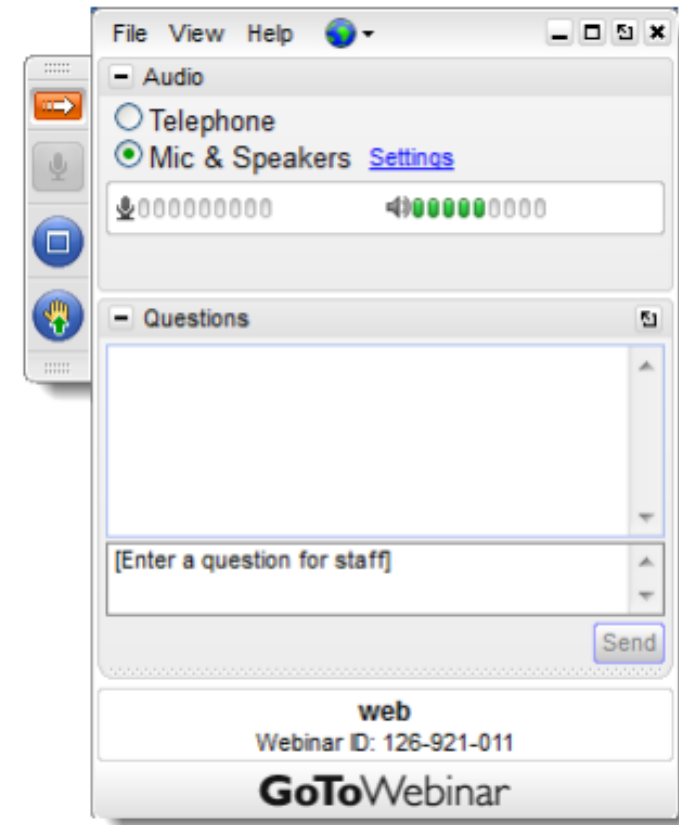
To view archived webinars or sign up to receive notifications, visit:

[www.esha.com/news-events/webinars](http://www.esha.com/news-events/webinars)



# Please Note!

- ✓ The webinar is being recorded
- ✓ All webinars available on our website
- ✓ Submit your questions in the GoToWebinar control panel
- ✓ We'll email a copy of the recording and the slides following the webinar





# What We'll Cover Today



- Ingredient & Recipe Entry Best Practices
  - Name vs. Common Name
  - Naming Convention Do's & Don'ts
- Groups vs. Attributes
  - Use cases
  - Creating Groups & Attributes
  - Searching
- Q&A





# Naming – Name vs. Common Name

## Name

- Database type name – categorized, internal uses
- Name in a consistent manner that will help sort many foods
- 1000-character limit

## Common Name

- Use this field to enter a “recipe friendly” name for the food
- If “Common Name” is enabled, many reports will display this name in place of what is entered in the “Name” field

| Item Name                                       | Common Name        |
|---|--------------------|
| flour, all purpose, white, unbleached, enriched | Flour, All Purpose |
| water, distilled                                | Water              |
| sugar, white, granulated                        | Sugar              |
| yeast, bakers, active, dry                      | Yeast              |
| salt, table                                     | Salt               |
| butter, unsalted for butter top bread           | Butter             |



# Naming Convention Do's

- **Naturally Ordered:** Order elements from general (category, family, etc.) to specific (type, flavor, size, etc.): *Latte Nonfat Vanilla Small 12 oz*
- **Location:** If your Ingredient or Recipe is intended for a specific geographic region, include a region code or abbreviation in your naming convention: *Latte Nonfat Vanilla Small 12 oz NW*
- **Numbering:** When including numbers in a file name use at least two digits in order to maintain a correctly sorted numeric order. Include the zero for numbers 0-9 (01, 02, 03, etc.) so that numbers sort correctly: *01, 02, 03 ... 19, 20, 21*
- **Version Control:** Differentiate between drafts and final versions of records by using versioning in the names: *RecipeA-v01, RecipeA-v02, RecipeA-v03*
- **Dates:** Seasonal or date-specific items, list the date in the name. As a best practice, state the date “back to front” with the year first: *YYYYMMDD, YYYYMM, or YYYYQ1*





# Naming Convention Don'ts

- **Abbreviations:** Avoid using abbreviations, acronyms, initials, and codes *that are not commonly understood*
- **Special Characters/Punctuation:** Avoid use of special characters, such as \* : \ / < > | " ? ! [ ] ; = + & £ \$
- **Inconsistency:** Avoid error and duplication
  - Latte Nonfat Vanilla Small 12 oz
  - Small Vanilla Nonfat Latte 12 oz
  - Small vanilla Nonfat latte



# Additional Information Fields

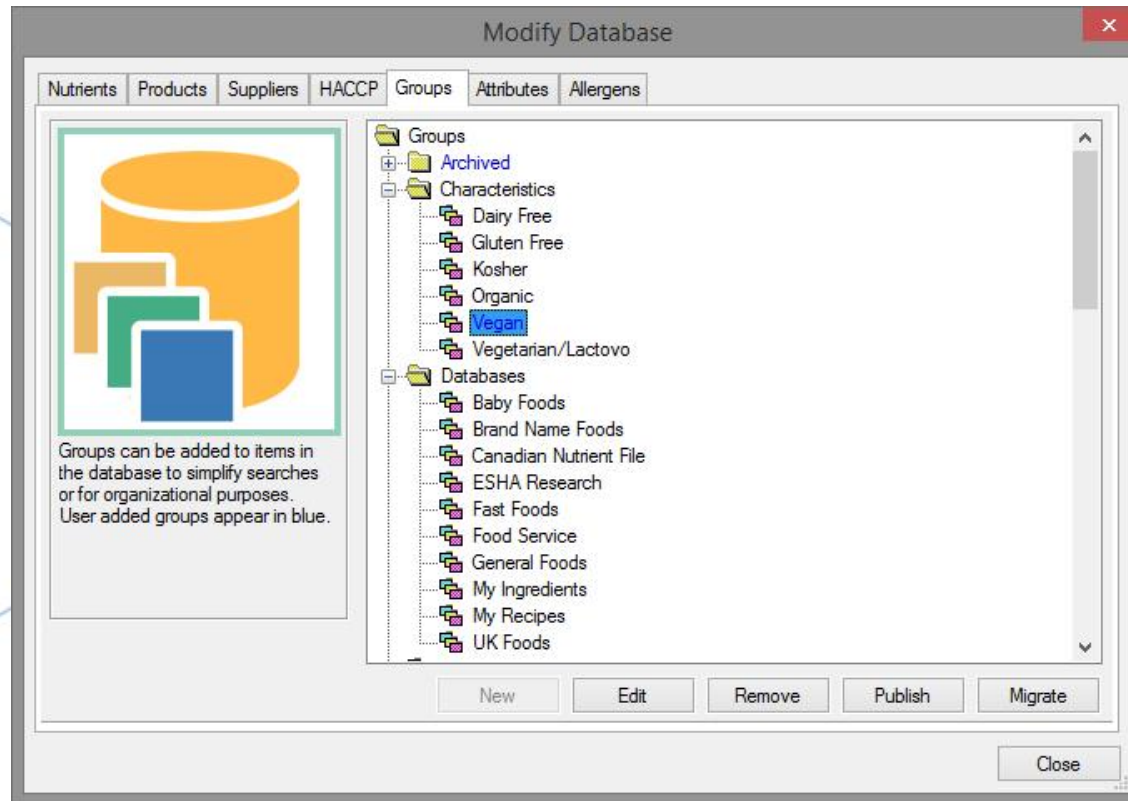
- **User Code:** original, specific user code for ingredients and recipes. User Codes must be unique.
- **Product:** product line (perhaps brand)
- **Supplier:** primary supplier or source of the information.

The screenshot displays the 'Recipe Information' form in the ESHA Research software. The form is titled 'Recipe: Bread' and includes a sidebar with navigation options: Recipe, Nutrients, Measures, Brix Calculation, Cost, Groups, Attributes, Compare To, Preparation Method, Reference Amount, Nutrient Content Claims, Notes, HACCP, and Attachments. The main form area contains the following fields:

- \*Name:** Bread
- Serving Size:**
  - ☐ A recipe makes 958.357 Servings.
  - ☒ A serving weigh: 43 Gram
  - ☐ A serving is Select Measure
- Optional:**
  - Common Name:
  - User Code:
  - Product:** (highlighted with a red oval) Select...
  - Supplier:** (highlighted with a red oval) Select...
- Created: 09/23/2019
- Modified: 08/13/2021



# Groups – Benefits of Using



- Organizing records
- Searching (include/exclude)
- Exporting
  - Which version of records to share or publish
  - ESHA Port
  - Genesis R&D API
- Access Control
  - ESHA Security
  - Levels of read/write access



# Import/Export Tools & Groups

**ESHA Port:** When exporting records from ESHA Software to ESHA Software or using ESHA Port, Groups can be used to filter the exported records.

**Genesis R&D API:** Groups can be published to the Genesis API to expose formulas, analysis, and label data from Genesis R&D and send the information to external and internal interfaces such as website, point- of-sales system, inventory management system, and QC or document controls.



# ESHA Security & Groups

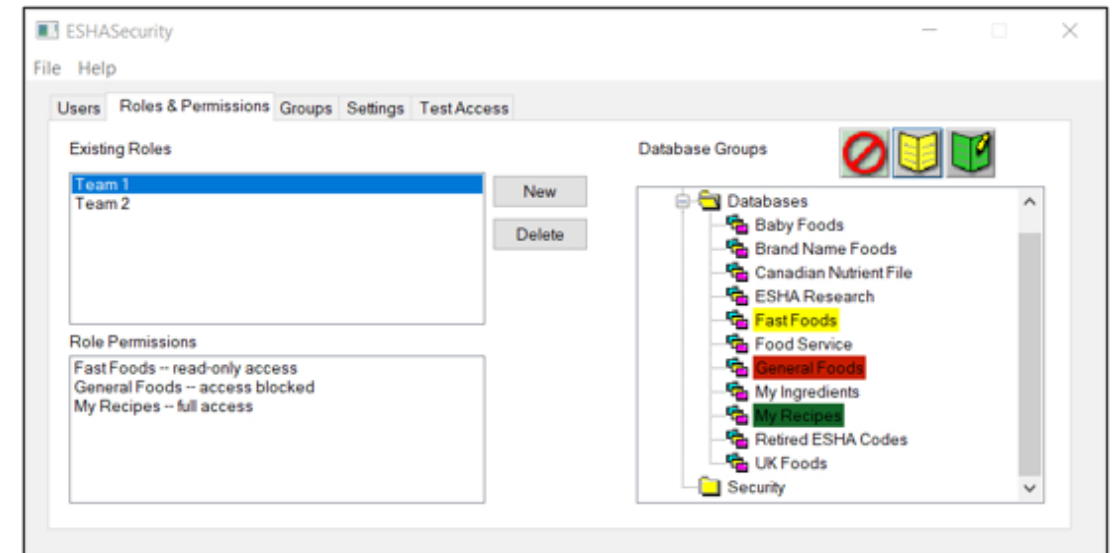
Groups can be used to designate varying levels of read/write access permissions to records in the database.

## Establish

- Users
- Roles and Permissions

## Levels of Permission

- **No access:** User is not allowed to view, open or modify the item.
- **Read-Only access:** The user can open the item but is not allowed to save changes. The user can, however, save a copy of the item under a new name.
- **Read-Write access:** The user can open and modify the item freely. The user will always have this level of access to any item personally created. Access is granted at a specific level to a role for a specific group.

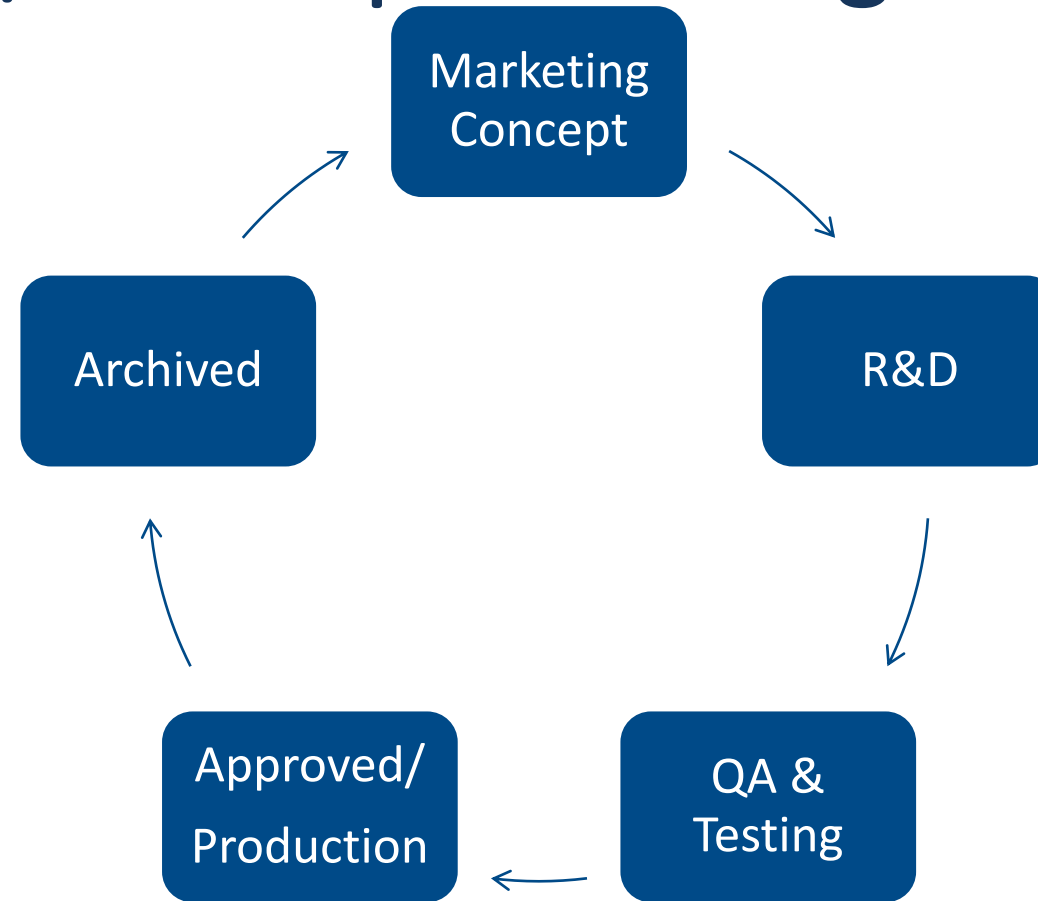




# Use Case for Groups: Country/Territory



# Use Case for Groups: Departments/Development Stages





# Use Case for Groups: Item Type

- Limited time/special edition offerings
- Regular menu items
- Seasonality





# Benefits of Using Attributes

- Document properties or characteristics
- Attach documentation to support the Attribute
- Ingredient Attributes carry forward to Recipes
- Qualifying Attributes appear on the View Label report

SAMPLE, Fruit Salad  
05/16/2019

| Nutrition Facts                |              |
|--------------------------------|--------------|
| about 8 servings per container |              |
| Serving size                   | 1 cup (142g) |
| Amount per serving             |              |
| <b>Calories</b>                | <b>160</b>   |
| % Daily Value*                 |              |
| Total Fat 8g                   | 10%          |
| Saturated Fat 3g               | 15%          |
| Trans Fat 0g                   |              |
| Cholesterol 0mg                | 0%           |
| Sodium 5mg                     | 0%           |
| Total Carbohydrate 22g         | 44%          |

Ingredient

Nutrients

Yields/Measures

Cost

Groups

**Attributes**

Ingredient Statement

Allergens

Attachments

| Property             | Qualifies   | Documentation   |
|----------------------|---|---|
| Bioengineered ⓘ      | <input checked="" type="checkbox"/> <input type="checkbox"/> ?? | <input checked="" type="checkbox"/> Bioengineered-report.docx |
| No Artificial Flavor | <input checked="" type="checkbox"/> <input type="checkbox"/> ?? | <input type="checkbox"/>                                      |

[Add an attribute](#)

Qualifying Attributes: Bioengineered



# Attributes Indicators



= yes, attribute applies



= no, attribute does not apply



= undetermined

Recipe Information

Attributes

| Qualifies | Property             | Override   | Documentation |
|-----------|----------------------|--|---------------|
| ✓         | Bioengineered ⓘ      | ✓ <input type="checkbox"/> <a href="#">clear</a> |               |
| ✓         | No Artificial Flavor | ✓ <input type="checkbox"/> <a href="#">clear</a> |               |

+ [Add an attribute](#)

OK Cancel





# Attributes Rules

Attributes in Genesis R&D adhere to one of two rules:

- “All items in the food must have the attribute”
- **- or -**
- “At least one item in the food must have the attribute”

Examples:

- “All items”: Free of Artificial Color – all ingredients must be free of artificial color for the attribute to be true for the Recipe
- “At least one item”: Bioengineered Rule - if one ingredient meets the determination of bioengineered, then the Recipe *could* be considered bioengineered



# Use Case for Attributes (*AND Groups*)

Categorize your ingredients and recipes by the claims they qualify for





# Genesis R&D Training

## Genesis R&D Foods Professional + FDA Regulations

This 2-day training session covers the fundamentals of the Genesis R&D Food program with a primary focus on FDA regulations: creating ingredients and composite ingredients, building recipes/formulas, nutrition analysis, moisture loss, reporting, labeling, best practices, and much more. In addition, this session covers a comprehensive FDA regulatory review.

## Genesis R&D Foods Advanced Training

The 1-day Advanced session builds upon the skills learned in the Professional training and offers deeper learning on topics including PDCAAS, International Food Labeling, Advanced Label Settings, and more.

| Title  | Date                                   | Location   |
|--|--|--|
| Genesis R&D Foods Professional + FDA Regulations<br>Genesis R&D Foods Advanced | Sept. 21-22, 2021<br>Sept. 23, 2021    | <b>IN-PERSON &amp; Online</b><br>ESHA Training Center<br>Oak Brook, IL |
| Genesis R&D Foods Professional + FDA Regulations<br>Genesis R&D Foods Advanced | Oct. 12-13, 2021<br>Oct. 14, 2021      | Online only  |
| Genesis R&D Foods Professional + FDA Regulations<br>Genesis R&D Foods Advanced | Nov. 2-3, 2021<br>Nov. 4, 2021         | <b>IN-PERSON &amp; Online</b><br>ESHA Training Center<br>Oak Brook, IL |
| Genesis R&D Foods Professional + FDA Regulations<br>Genesis R&D Foods Advanced | Nov. 30 – Dec. 1, 2021<br>Dec. 2, 2021 | Online only  |

### Session Options:

- 3-day Combined Professional + Advanced Training
- 2-day Professional Training
- 1-day Advanced Training (Prerequisite: Professional Training)

**Contact:** [training@esha.com](mailto:training@esha.com) or **Visit:** <https://esha.com/news-events/training-schedule/>

QUESTIONS?



## CONTACT US

Phone: 503-585-6242

Sales: [sales@esha.com](mailto:sales@esha.com)

Support: [support@esha.com](mailto:support@esha.com)

Consulting Services: [cs@esha.com](mailto:cs@esha.com)

Training: [training@esha.com](mailto:training@esha.com)



## HELPFUL RESOURCES

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