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Mosaic BOH ⚡ | Apples to apples: How best to transition from Nutrikids

PRESENTED BY KRISTIN DUSETT

Agenda

- Benefits of Mosaic BOH
- Onboarding & Conversion
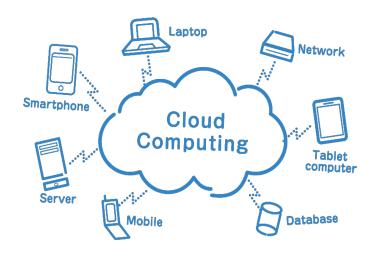- What to Expect
  - Features
  - Navigation
  - Reports
- Training & Support

Benefits of MOSAIC

Cloud Services

- Access Database to SQL

- 100% Hosted Website

- Access Data Everywhere

- Data Security

- Disaster Recovery

Onboarding Process

What Is the Onboarding Process?

- Implementation Specialist

- Kick Off Call – Presentation

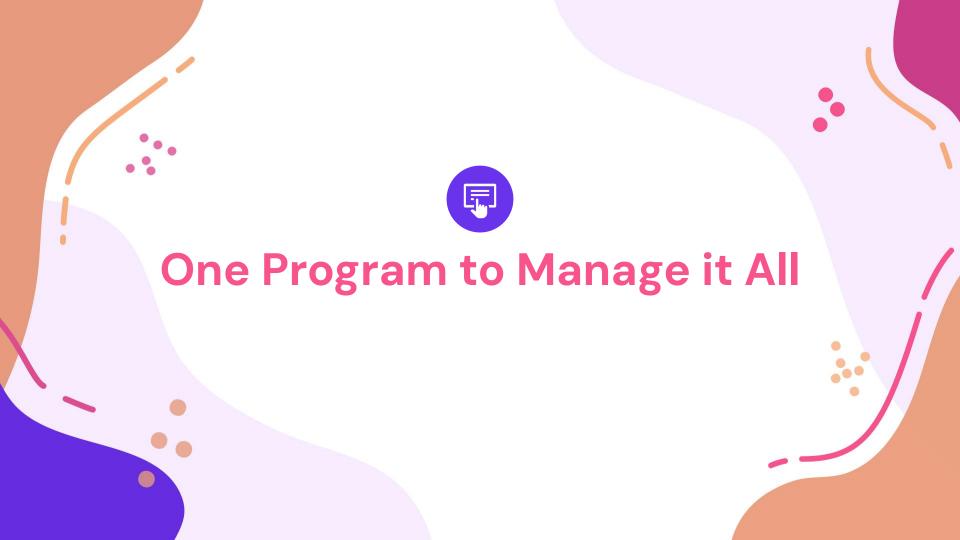- What data is getting converted?

- Verification Error Log (NutriKids)

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Conversion Process

Process of Converting

- NutriKids data will flow into MOSAIC Cloud Back of House
  - Ingredients
  - Recipes
  - Menus
  - Production Records
  - Inventory Items
  - Sites

- Update Users

- Training
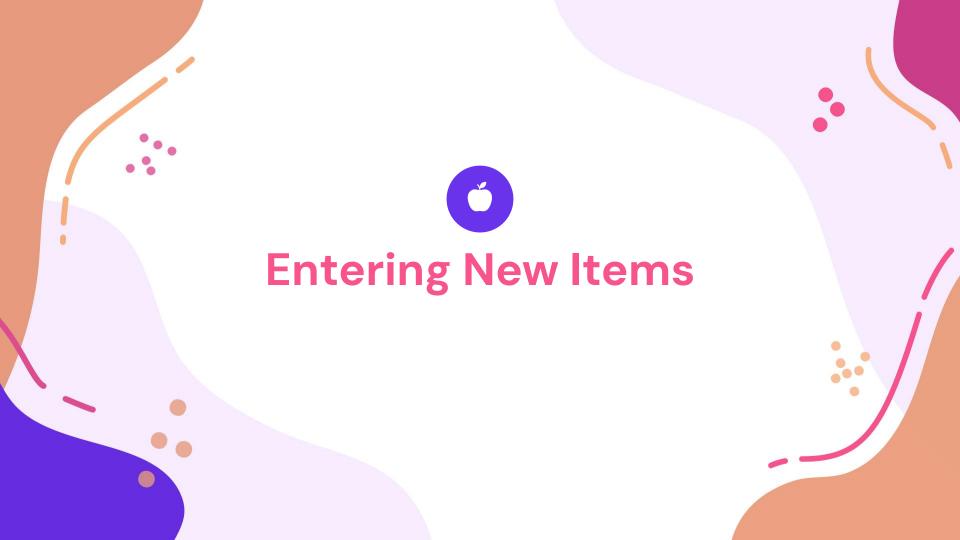
- HSS University & User Guides

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One Program to Manage it All

MOSAIC Back of House Options

- Start planning your menu where you left off with NutriKids

- Unlimited Users & Security Roles

- Menu Planning

- Production Records

- Ordering and Inventory

- Menu Communication

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Entering New Items

Entering Menu Items

- Import NutriKids Ingredients data

- Use the default USDA Ingredients or create your own

- Share or download recipes using the Community

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Entering Inventory Products

- Import NutriKids Inventory data

- Bulk import via Excel Spreadsheet / Vendor Product List

- Price Lists group your Products & Prices by Vendor

- Prices may be regularly updated manually or using imports

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What Reports to Expect?

Menu Planning Reports

- USDA Weekly Requirements Report

- Menu Spreadsheets & Nutrient Analysis

- Menu Contribution Report

- Recipe Prep / Resizing Sheets

- Production Records

- Menu Plan Calendar

- & more!

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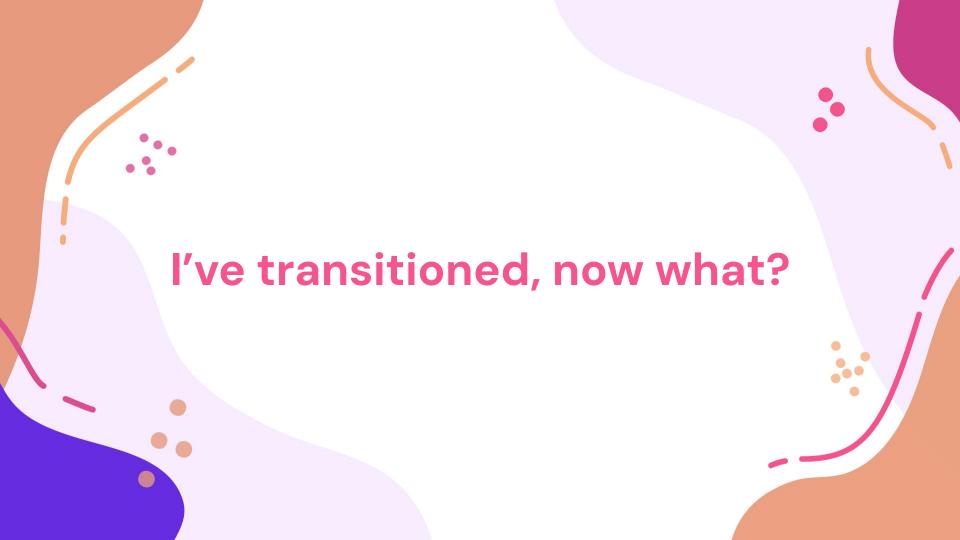# Ordering & Inventory Reports

- Purchase Order Reports

- Warehouse Availability & Transfer Sheets

- Inventory On Hand Report

- Inventory Transactions Report

- & more!

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I've transitioned, now what?

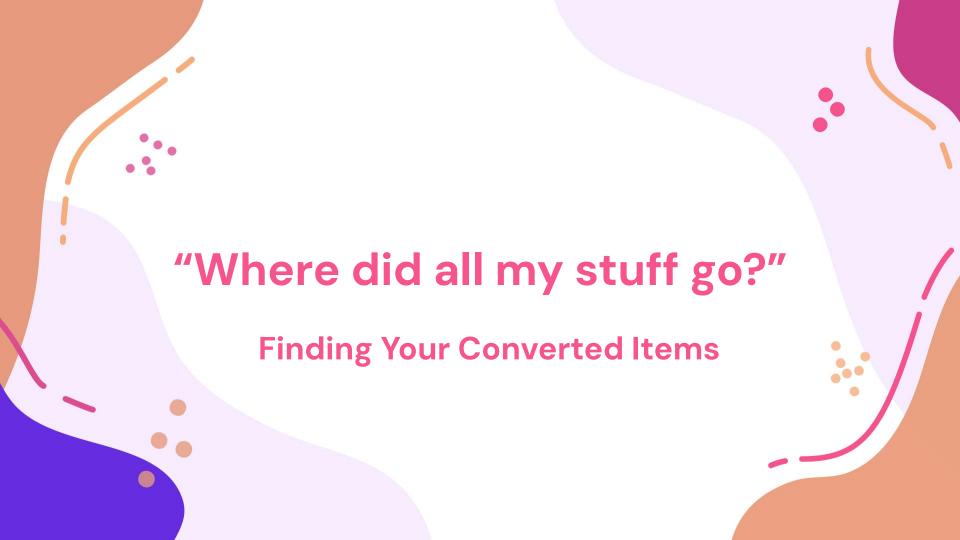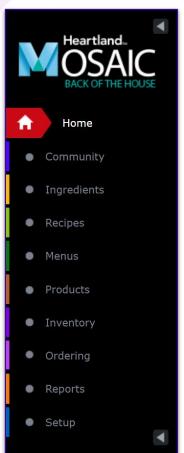# Going Live

- When everything is in place, you're ready to start using Mosaic

- Enter Menus & Production Forecasts

- Enter Opening Inventory sessions

- Adjust System Settings

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"Where did all my stuff go?"
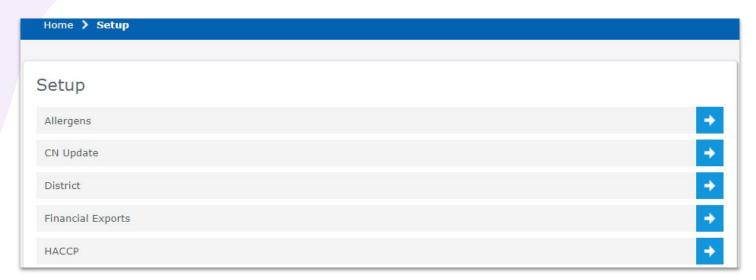
Finding Your Converted Items

Navigation – the Main Menu

NutriKids Menu Planning	NutriKids Perpetual Inventory
Ingredients	Products
Recipes	Ordering
Menus	Inventory

New in Mosaic
Community
Reports
Setup

System Setup, Settings & Options

Home > Setup

Setup

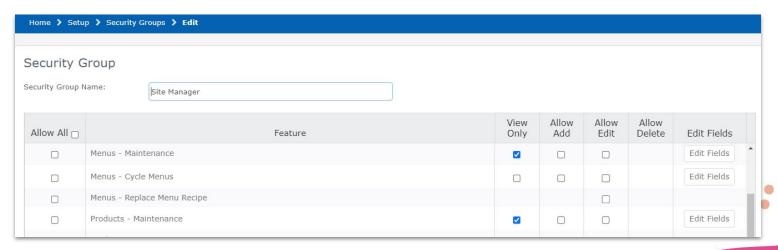| Allergens | → |
CN Update	→
District	→
Financial Exports	→
HACCP	→

- All located in the **Setup** tab rather than the *Tools* section from NutriKids– no more toolbar along the top
- Access to the Setup tab (and various other functions) can be controlled by administration by using **Security Groups**
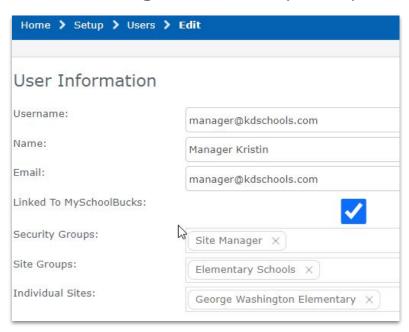
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Security Groups

- Controls who has access to what

- This has replaced Network Users Access Rights from NutriKids

- Each User account is assigned a Security Group as well as Site(s)

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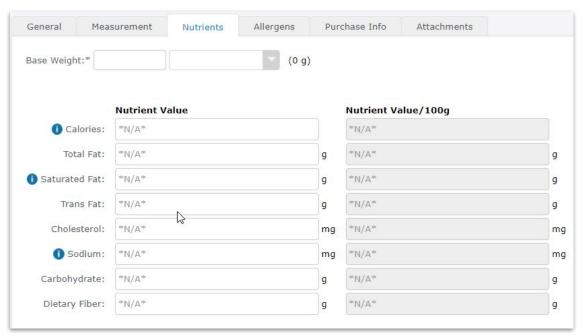

Home > Setup > Users > **Edit**

User Information

Username: manager@kdschools.com

Name: Manager Kristin

Email: manager@kdschools.com

Linked To MySchoolBucks: ✅

Security Groups: Site Manager ✕

Site Groups: Elementary Schools ✕

Individual Sites: George Washington Elementary ✕

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Menu Planning

Ingredients

- Digitally store Nutrient Fact Label
- Each Ingredient can be linked to an inventory **Product**
- **Allergens** are now assigned at the *ingredient* level
- May use "Bulk Deactivation" to hide USDA / Stock ingredients

Recipes

- Use the **Components** tab to credit food based contributions (Meat, Grain, Fruit, Veg, Milk, & Subgroups)

- Use the Reports tab within a recipe to resize and print **Recipe Prep Sheets**

- Share your recipes and download recipes from other Mosaic districts using **Community**

- Digitally store Nutrient Fact Label or other attachments associated with your recipes

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Menus

Menu #	Menu Name ^		Serving Period	Active	Grade/Age Group	
15	Breakfast K-12		Breakfast	Yes	K-12 (age 5-18)	Setup
62	Cycle Menu - All Sites		Lunch	Yes	9-12 (age 14-18)	Setup
92	Elementary Breakfast		Breakfast	Yes	K-5 (age 5-10)	Setup
29	Gluten Free		Lunch	Yes	N/A	Setup
10	High School Lunch		Lunch	Yes	9-12 (age 14-18)	Setup

- Instead of *Enter/Modify,* go into **Maintenance** to manage the Calendar menus, set Nutrition Standards, and assign Sites for Production
- Unlimited number of menu names
- From the main calendar menu easily view daily recipes, meal totals for all sites, and available reports
- Access **Weekly Checks** from the main menu screen to check compliance while building your menus

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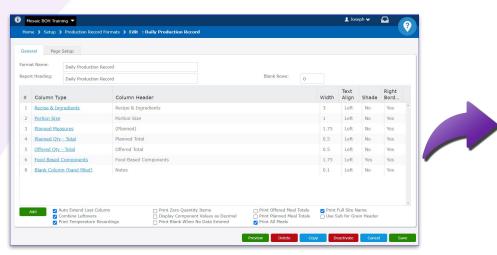
Menu Reports

- The **Reports** section is where you'll find important reports needed for nutrient analysis and component compliance

- Print a monthly **Calendar Report** for staff, parents, and students

- Once **Production Quantities** have been entered on the menu you can access a variety of **Production Records**

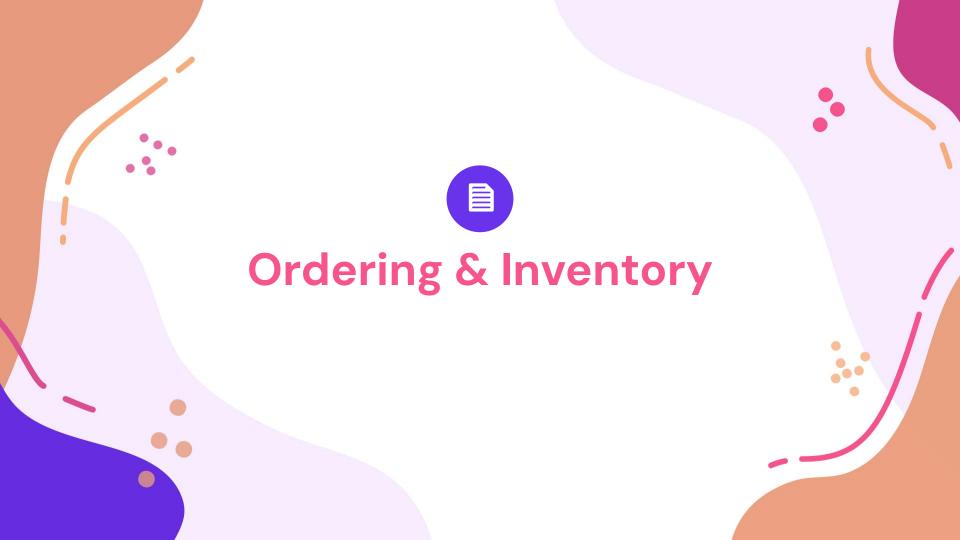- Schedule your **Production Records** to run automatically each day
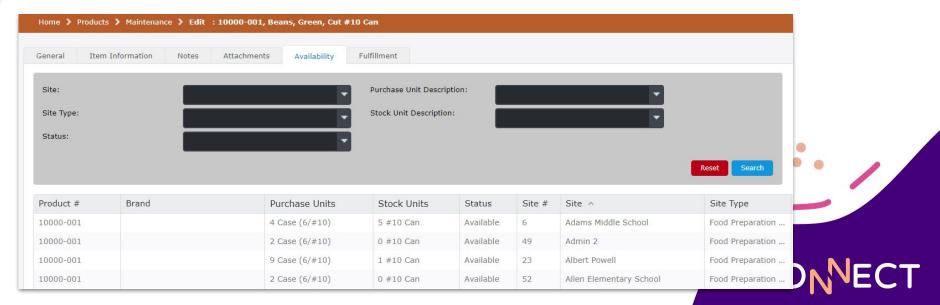
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Creating Custom Formats

- Your **Production Record Formats** transfer from Nutrikids
- Custom formatting lets you control the information displayed
- Design your own **Menu Calendars** and post them to your website
- Build a custom calendar or production record format in the **Setup** section

Ordering & Inventory

Products & Price Lists

- **Items** from NutriKids are now **Products** in Mosaic
- **Price Lists** organize your Products by Vendor
  - Required when using the **Ordering** features
- Designate a product's primary source as **Vendor** or **Warehouse**
- View current on hand stock at all sites on the **Availability** tab

Inventory

- **Physical Counts**
  - Open sessions for **all sites** at once
- **Ordering & Receiving**
  - Obtain Variance Report for partial receipts
- **Transfers**
  - Option to verify deliveries for site-to-site transfers
- **Usage**
  - Save time creating a Usage document with **Update Inventory**
- **Adjustments**
  - Obtain reports for specific **Adjustment Reasons**, like spoilage

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Inventory Reports

- *Inventory Value Report* is now the **Inventory On Hand Report**

- **Inventory Transactions Report**
  - Versatile permanent record of all transactions in Mosaic

- **Ordering & Receiving**
  - Individual or combined document formats

- **Invoice Reconciliation Report**
  - Reconcile receiving transactions with invoices from vendors

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Training & Support

Training, Support, and Contact Info

- HSS University - View Training Videos

- User Guides

- Knowledge Articles

- Monthly Live Webinars with an Expert

- Remote One-on-One Training

- On-site, in person Training

- Support Central

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Need Help?

Phone Support

1-800-724-9853, say "Mosaic
Back of House"

Email Support

MosaicMPSupport@e-hps.com

Additional Resources

help.heartlandschoolsolutions.com

Available in the Help Menu

HSS University Training Videos
User Guides
Knowledge Articles

Thank you

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