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Mosaic BOH | Beyond basics: Level up your Mosaic BOH Experience

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Topics of Discussion

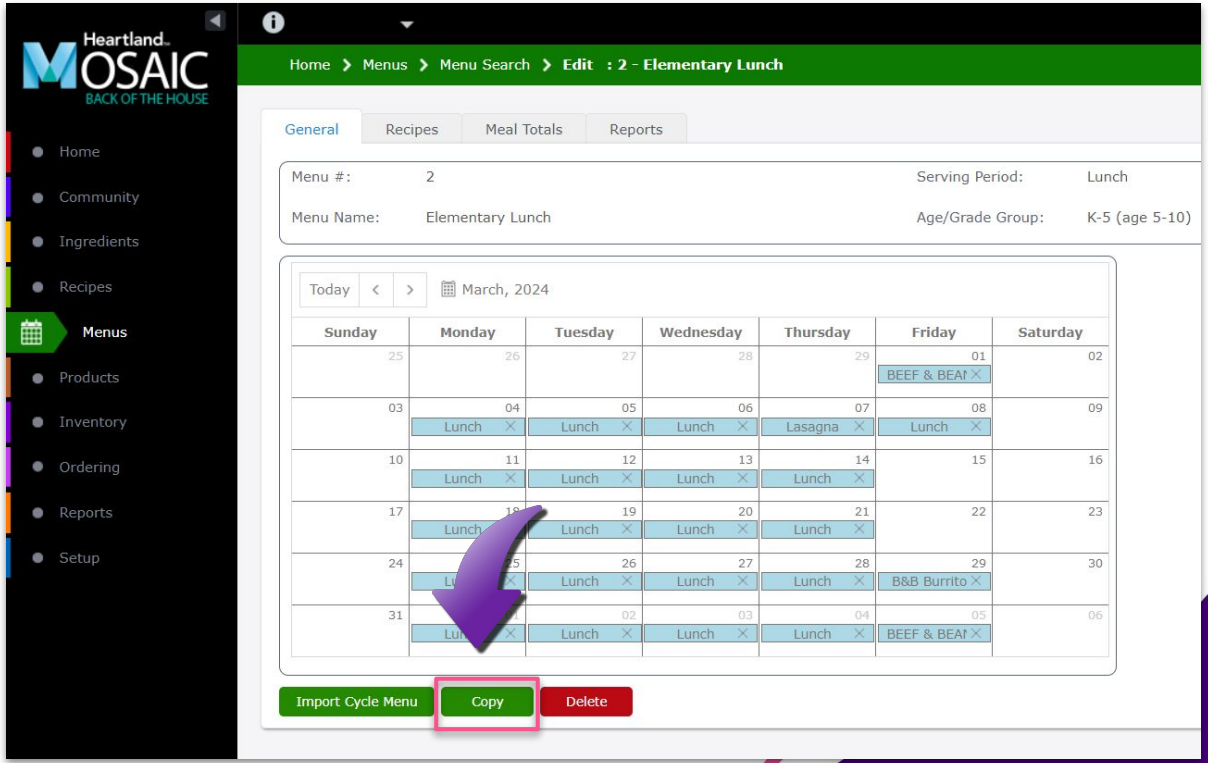
This presentation will be focused on Mosaic Menu planning topics that will take your knowledge a step further than the program fundamentals

- Copying Menus
- Utilizing Cycle Menus
- Entering Production Quantities
- Generating Production Records
- Creating Custom Production Record Formats

Copying Menus

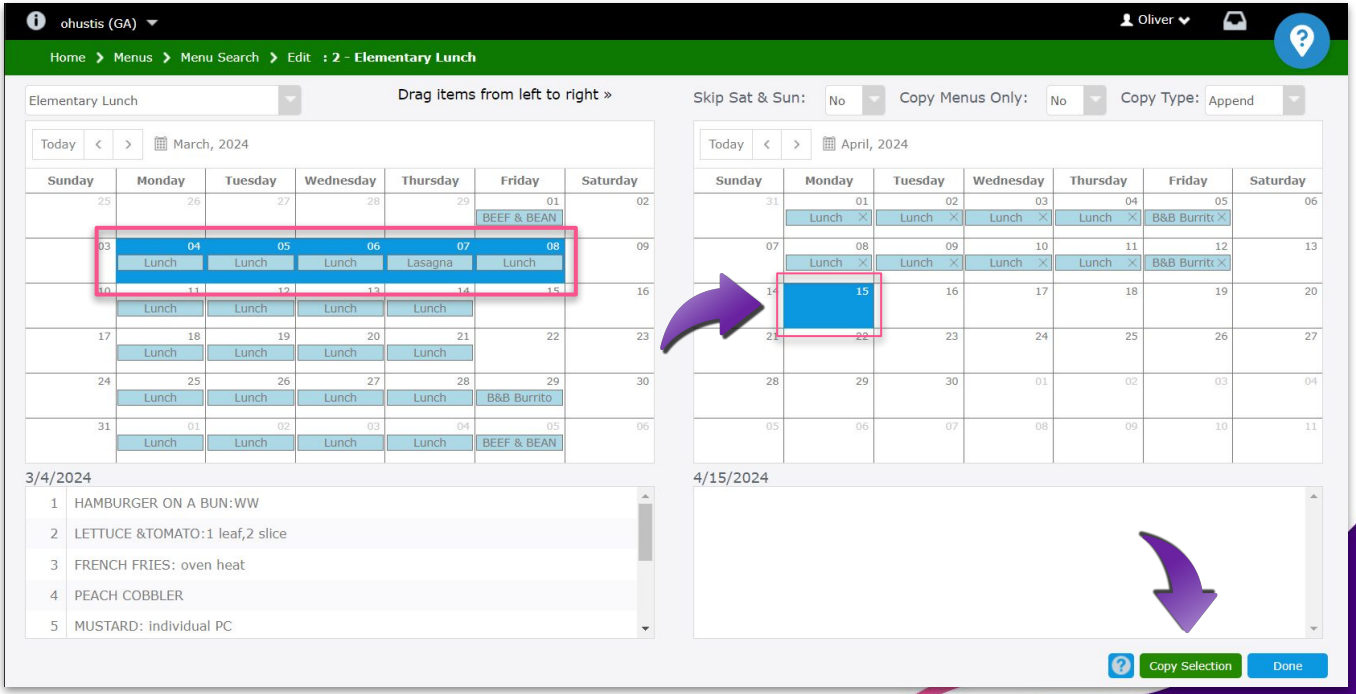
How to copy a menu

- You want to copy a finished menu from one month to the next, or between menus
- Use the copy menu option at the bottom of the menu calendar view



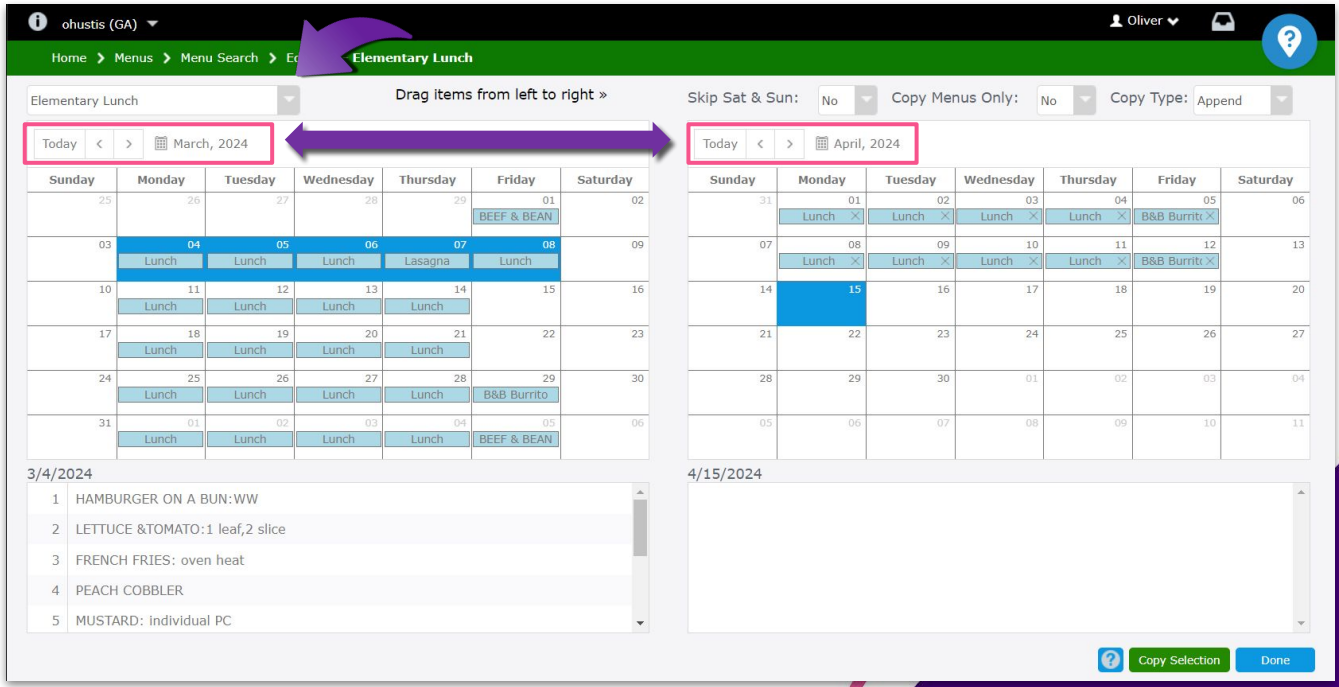
How to use the copy menu feature

- After selecting “copy”, 2 menus will appear
- Menu information can be selected from the left hand menu (**Source**) and applied to the menu on the right (**Target**)
- You may select just 1 day, or a range of days to copy
- To finalize, select “Copy Selection”



How to use the copy menu feature

- You may change the menu you are copying from (**Source**) by using the dropdown menu
- You must be on the **Target** menu (the menu you are copying to) when selecting the “copy” button
- Navigate the calendar months using the arrow keys



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Copy menu options

Skip Sat & Sun

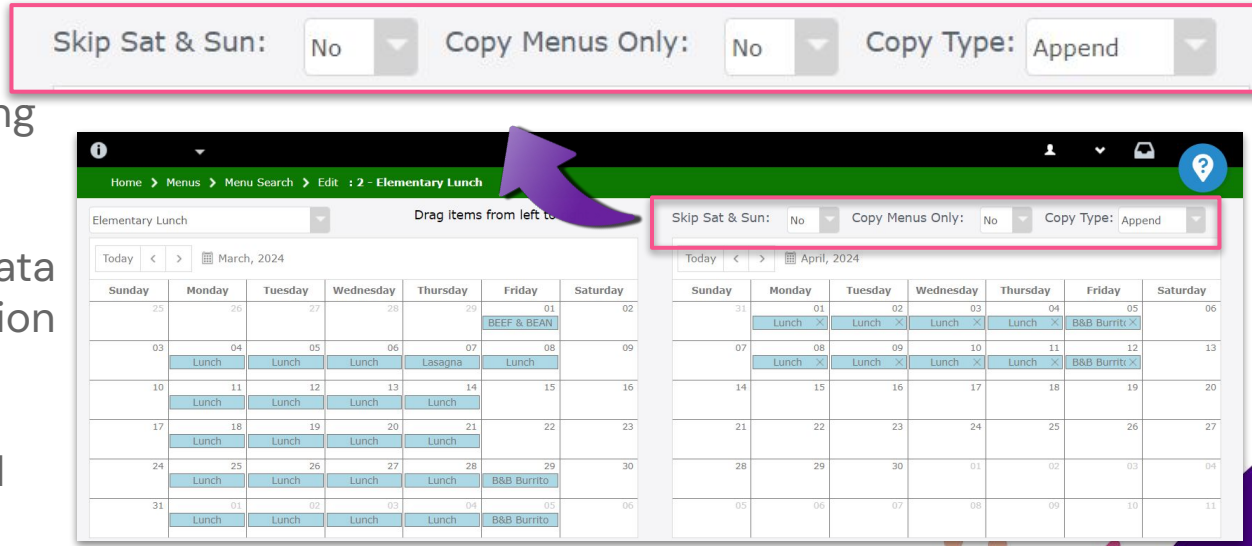
- No = Allow copying to weekends
- Yes = Don't allow copying to weekends

Copy Menus Only

- No = Copies all menu data
- Yes = Excludes Production Quantities

Copy Type

- Append = Add selected information to menu information already present
- Overwrite = Replace menu information on target menu



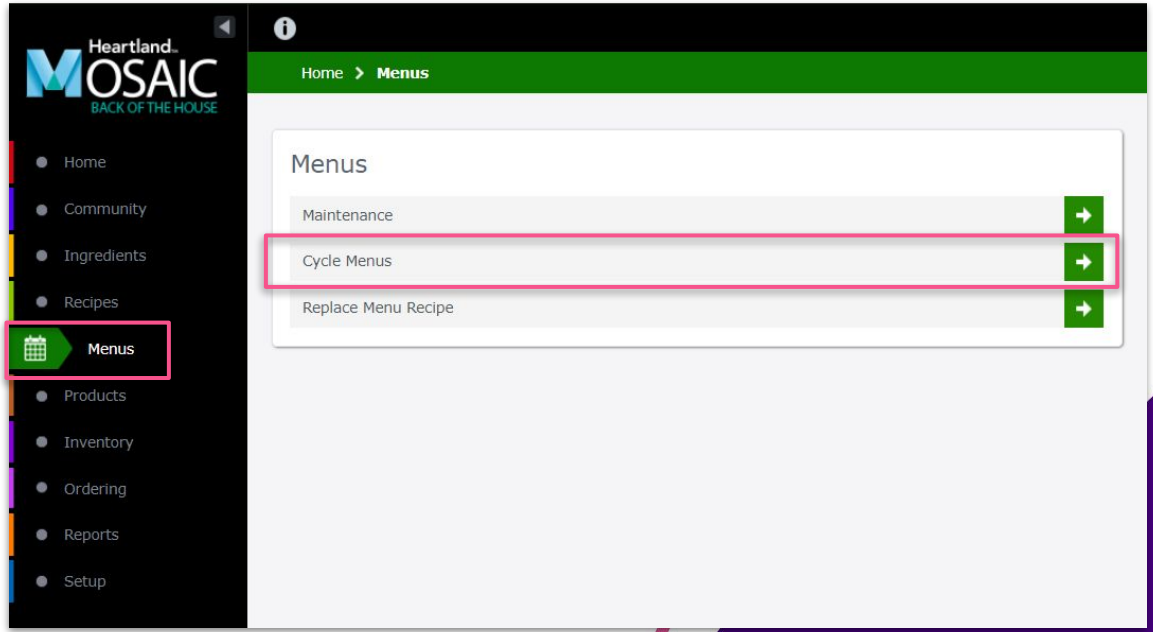
Utilizing Cycle Menus

What do cycle menus do?

Cycle Menus are used to create a different daily menu that repeats for several weeks. There is no limitation within Mosaic for the number of Cycle Menus you can create.

Within the cycle menus area of Mosaic you can:

- Plan a cycle menu (up to 16 weeks per menu)
- Modify the recipes planned on your cycle menus
- Input base reimbursable numbers
- Input site specific production quantities
- Organize your cycle menu items into reimbursable meal groups



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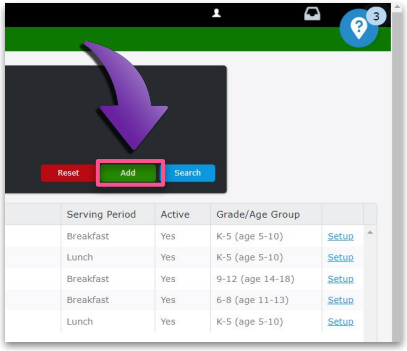
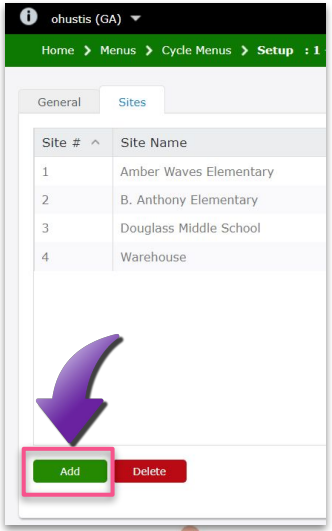
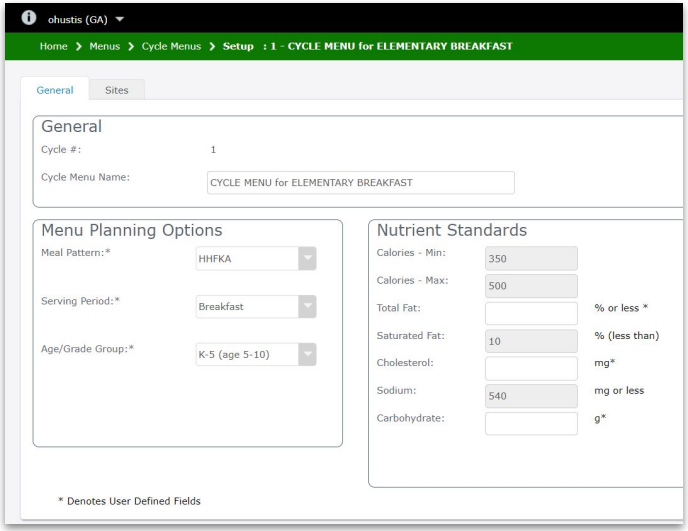
Adding a new cycle menu

- **Menus > Cycle Menus** by clicking the green Add button
- After adding a new menu, you will need to name it, then set your desired menu planning options and nutrient standards
- Lastly, you will need to assign sites to the new cycle menu







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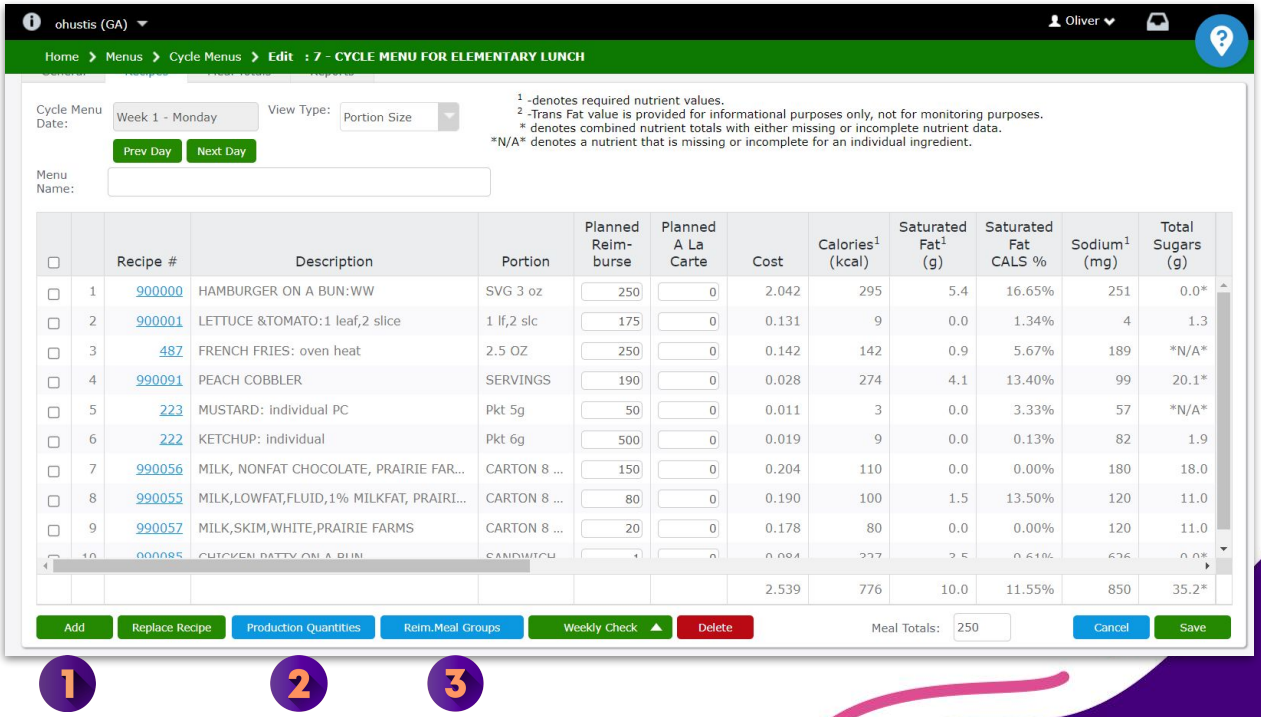
Planning a cycle menu

Cycle menus can be planned in the same way you would plan a monthly menu

- Menu items can be added with the Add button
- The Production Quantities button can be used to input planned, offered, and served numbers for your sites
- The Reim. Meal Groups button can be used to create reimbursable meal groups



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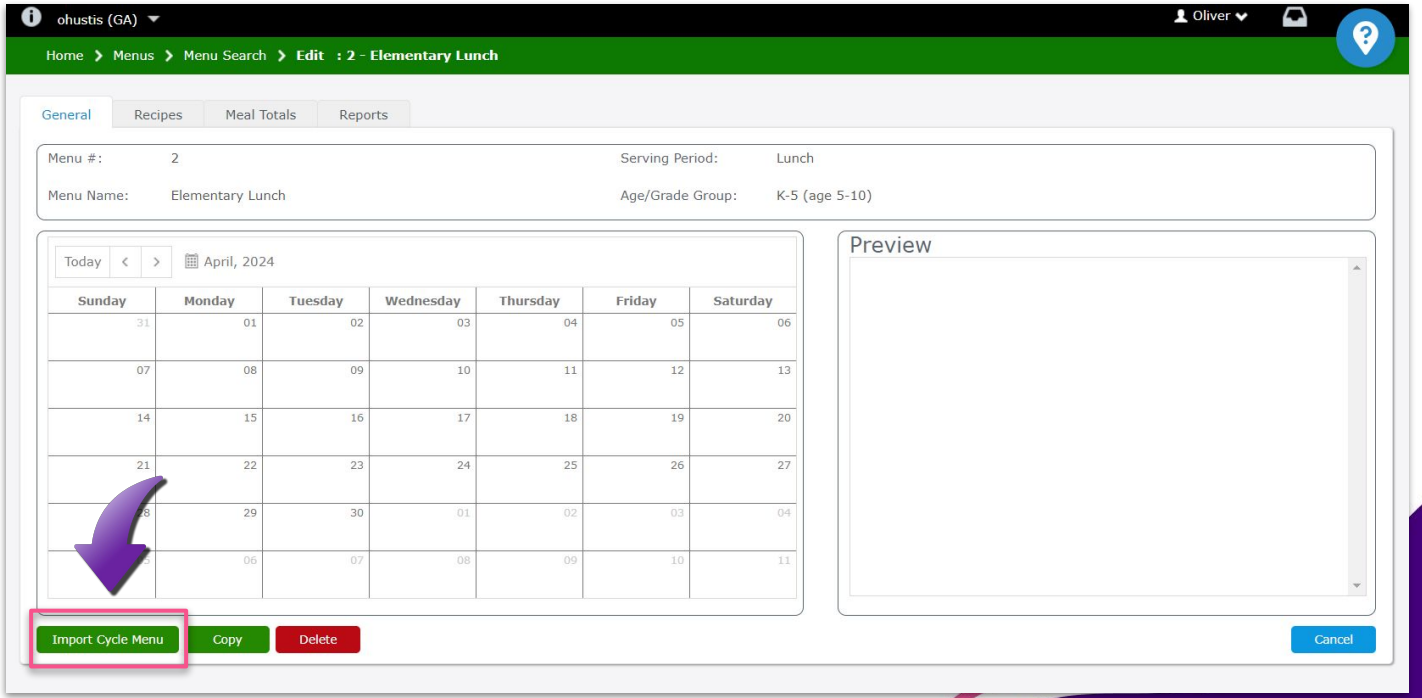
Importing a cycle menu into a monthly menu

Once you have created a cycle menu, you will want to put it to use by importing it into your monthly menus

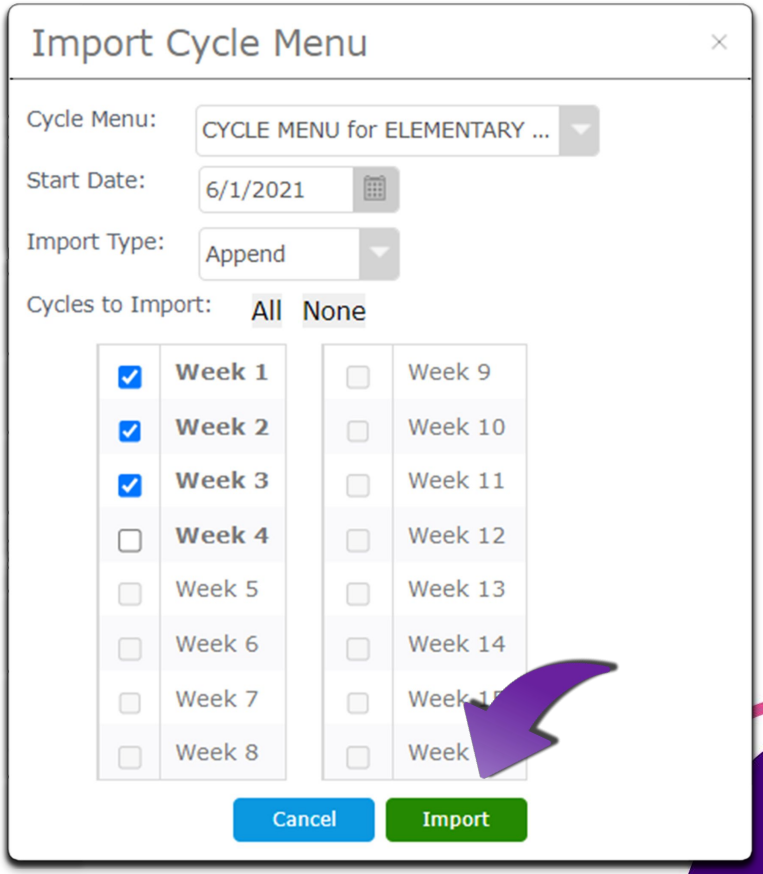
- This can be done in **Menus > Maintenance** on the main General tab of your chosen menu



Importing a cycle menu into a monthly menu

Once you choose to import a cycle menu, a popup window will appear. You will need to:

- Select the cycle menu you wish to import from
- Set the start date of the menu you wish to import to
- Set your import type (append or overwrite)
- Select which cycle menu weeks you wish to import

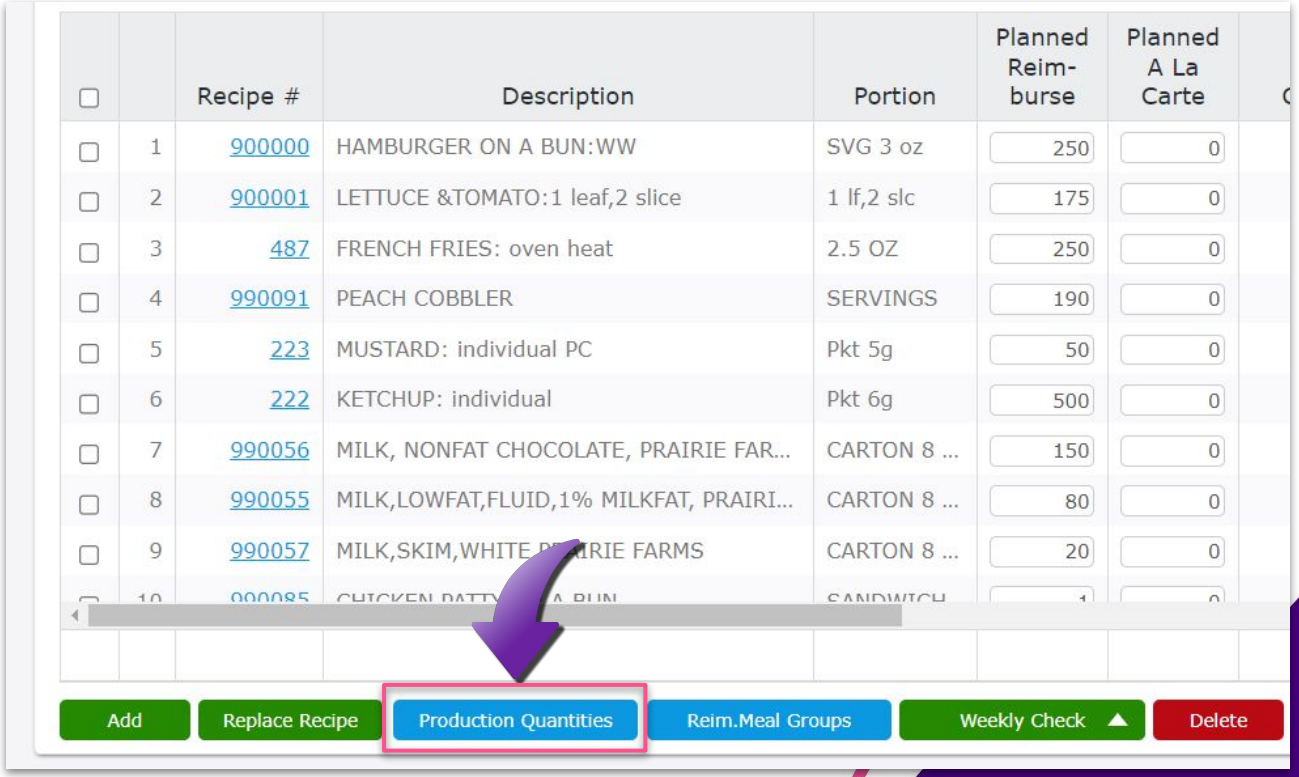


Production Quantities

Inputting Production Quantities

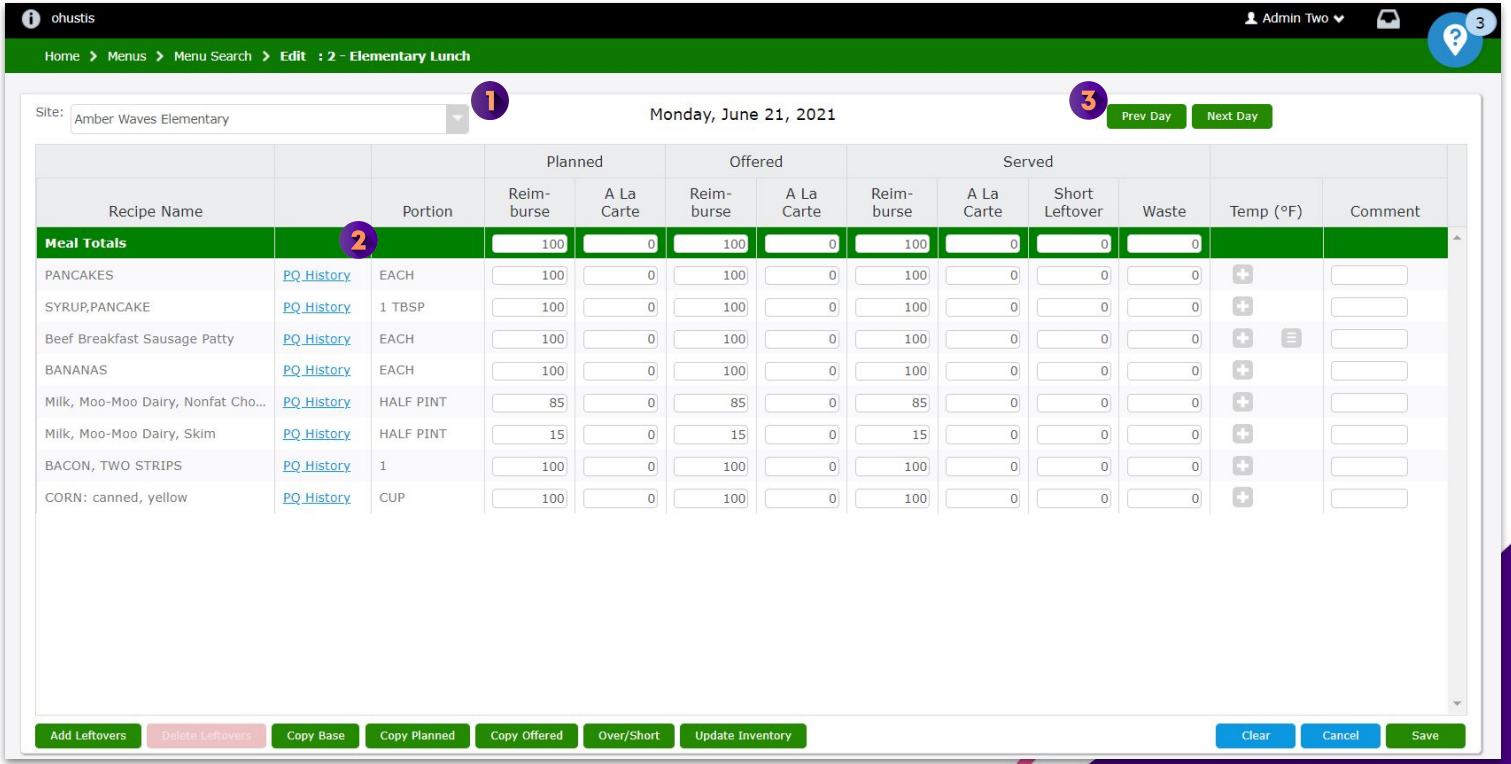
- Select Production Quantities button from a menu day

- On this screen you can enter production quantities for all required / desired fields



Inputting Production Quantities

- Select a site
- View the PQ history
- Use the previous / next day navigation



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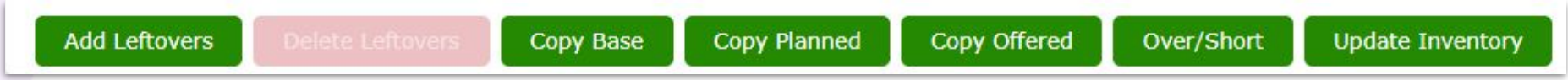
Production Quantity Options



- **Add Leftovers** Search for and add a leftover item
- **Copy Base** Copy your menus Base numbers and apply them to Planned
- **Copy Planned** Copy your Planned numbers and apply them to Offered
- **Copy Offered** Copy your Offered numbers and apply them to Served
- **Over/Short** Subtract your Served numbers from your Offered numbers to automatically fill the Leftover column
- **Update Inventory** Automatically create a usage transaction to subtract the used products from your site's inventory, featuring validation to prevent double entry

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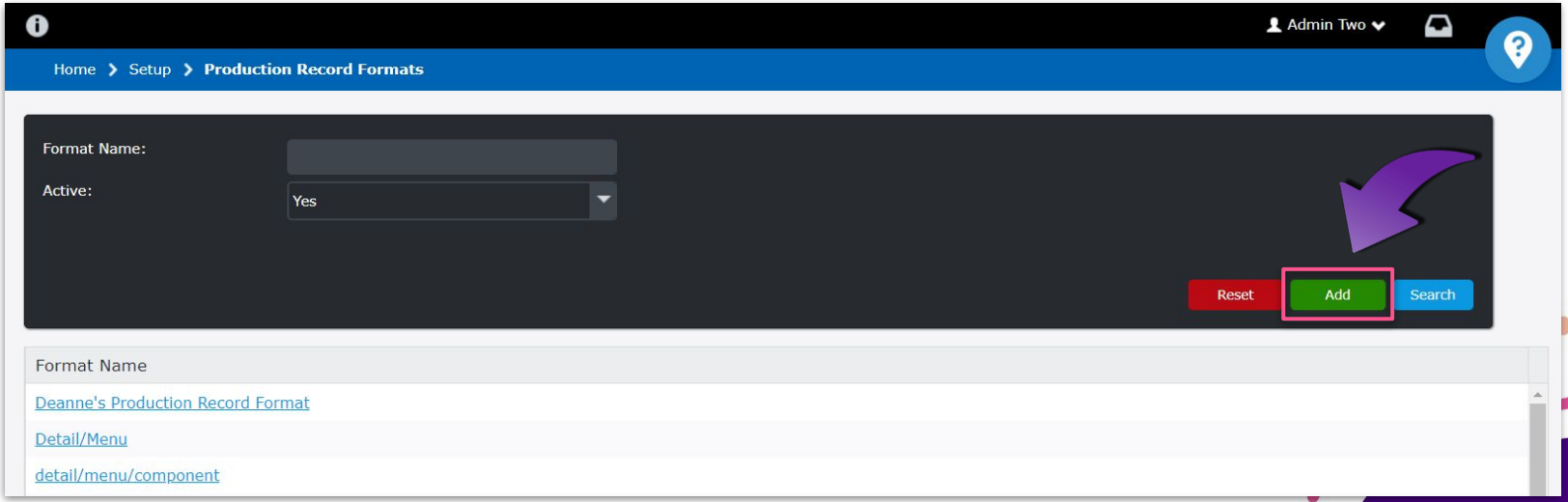
Production Records

Adding a new production record format

There are 9 default formats included that can be used as-is or customized

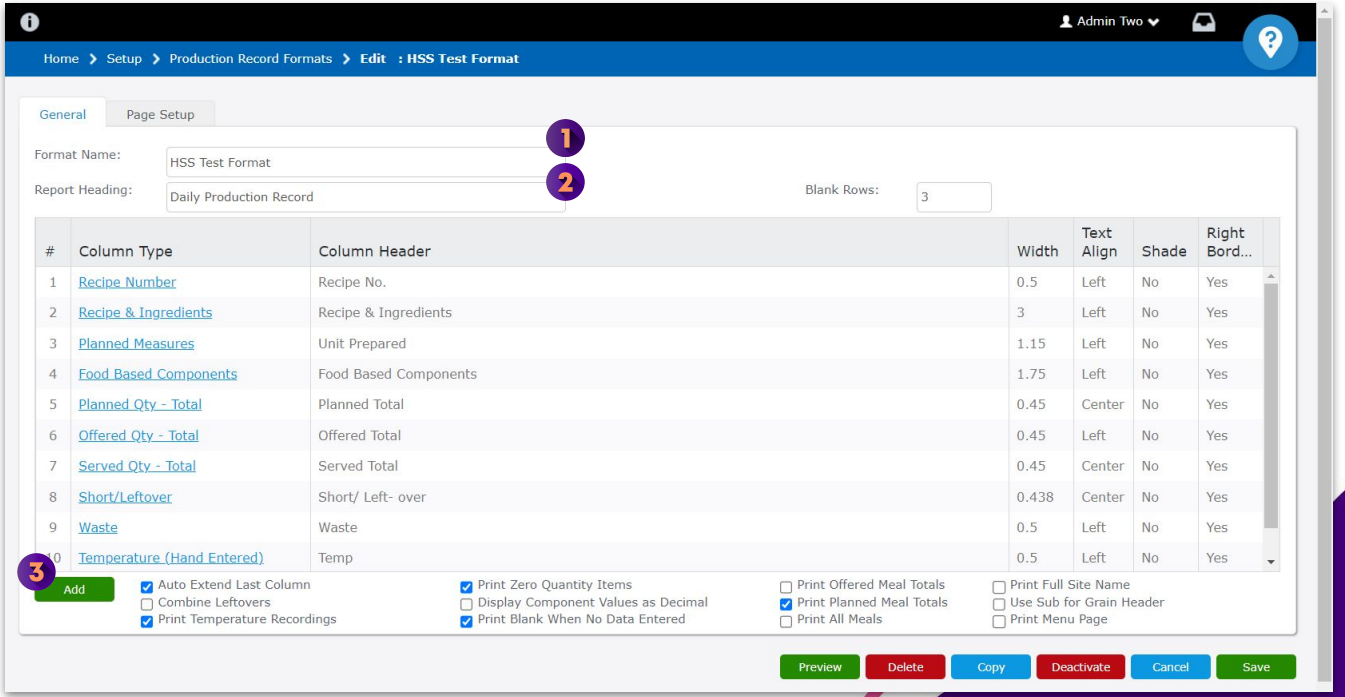
To add a new Production Record Format navigate to **Setup > Production Record Formats**, then select Add



Customizing your production record format

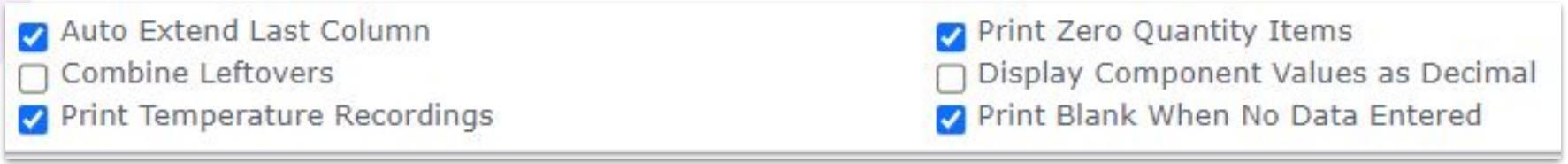
After adding a new production record format you will need to:

- Name your format
- Add a Report Heading to your format
- Add the columns you wish to include in your format
- Select formatting checkboxes



Customizing your production record format

For additional customization use the checkboxes to include more formatting options:



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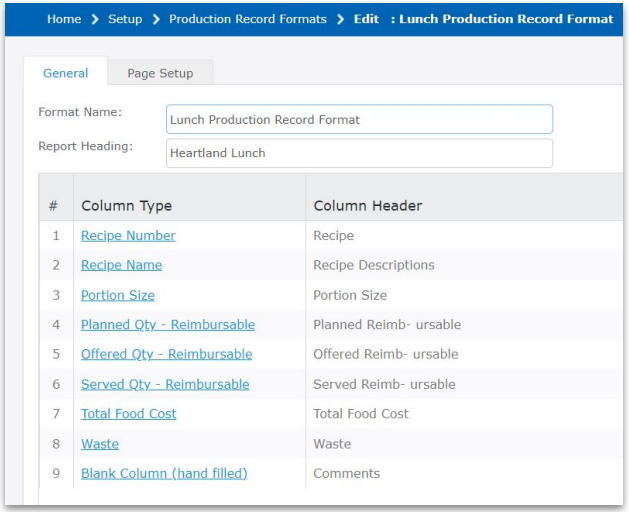
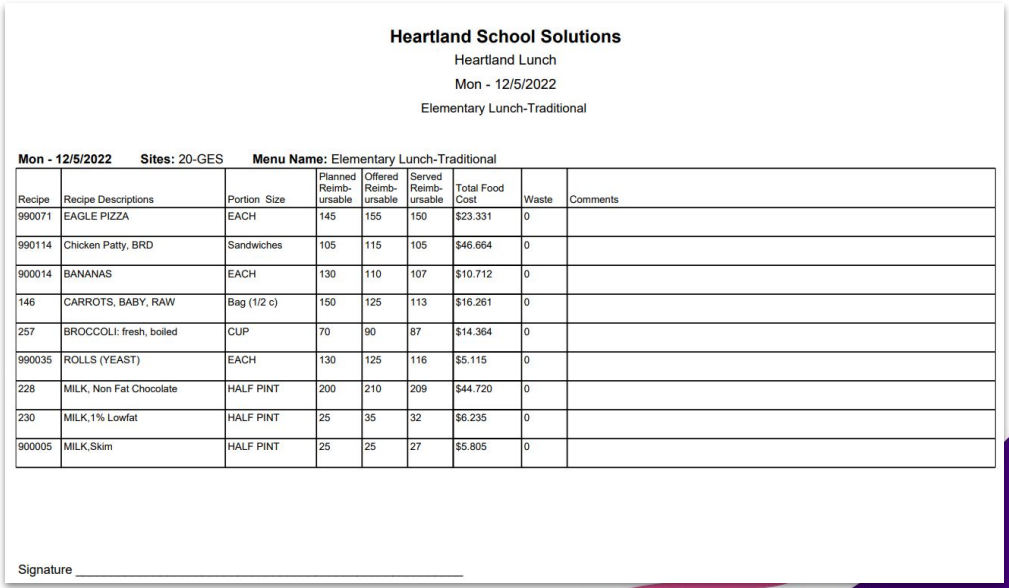
Customizing your production record format

- Select columns to determine information included
- Drag and drop column types to rearrange order
- Adjust column display settings





Heartland School Solutions

Heartland Lunch

Mon - 12/5/2022

Elementary Lunch-Traditional

Mon - 12/5/2022 **Sites:** 20-GES **Menu Name:** Elementary Lunch-Traditional

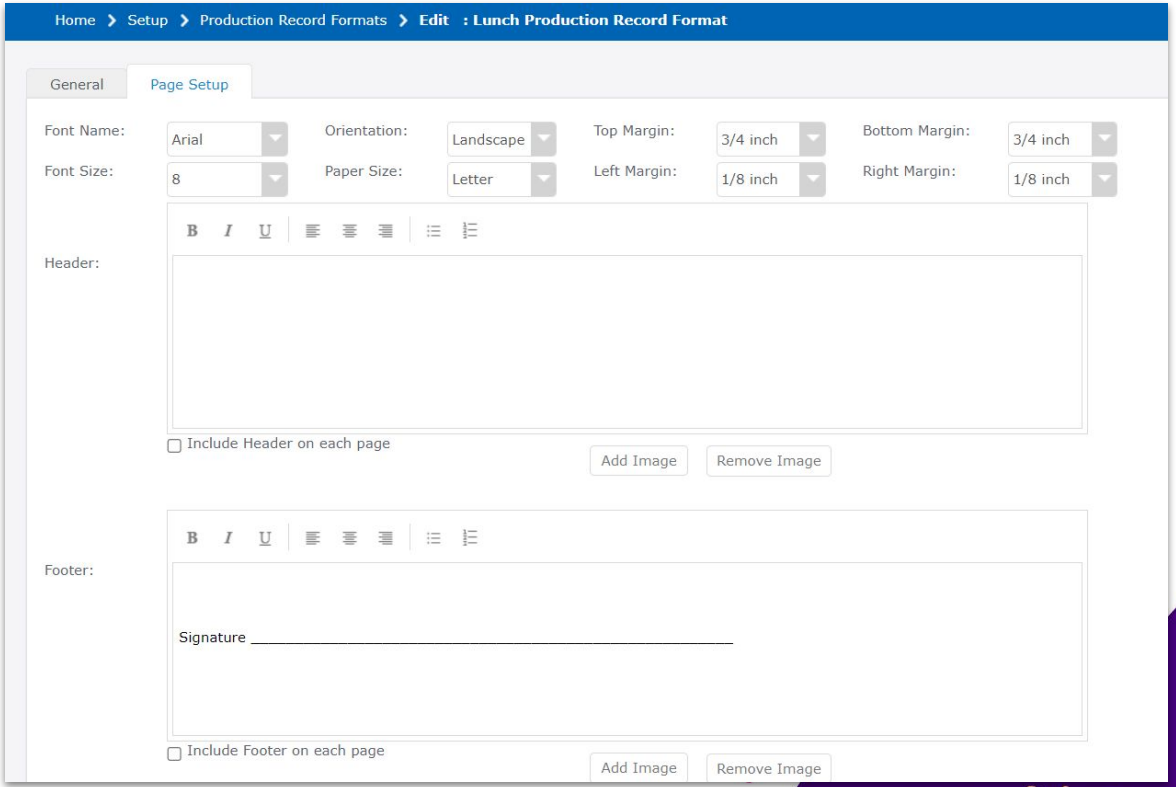
Recipe	Recipe Descriptions	Portion Size	Planned Reimb-ursable	Offered Reimb-ursable	Served Reimb-ursable	Total Food Cost	Waste	Comments
990071	EAGLE PIZZA	EACH	145	155	150	$23.331	0	
990114	Chicken Patty, BRD	Sandwiches	105	115	105	$46.664	0	
900014	BANANAS	EACH	130	110	107	$10.712	0	
146	CARROTS, BABY, RAW	Bag (1/2 c)	150	125	113	$16.261	0	
257	BROCCOLI: fresh, boiled	CUP	70	90	87	$14.364	0	
990035	ROLLS (YEAST)	EACH	130	125	116	$5.115	0	
228	MILK, Non Fat Chocolate	HALF PINT	200	210	209	$44.720	0	
230	MILK,1% Lowfat	HALF PINT	25	35	32	$6.235	0	
900005	MILK,Skim	HALF PINT	25	25	27	$5.805	0	

Signature _____

Customizing your production record format

The Page Setup tab allows for additional formatting options:

- Add a custom header & footer
- Change page layout (Portrait or landscape)
- Edit font type & size
- Customize page margins



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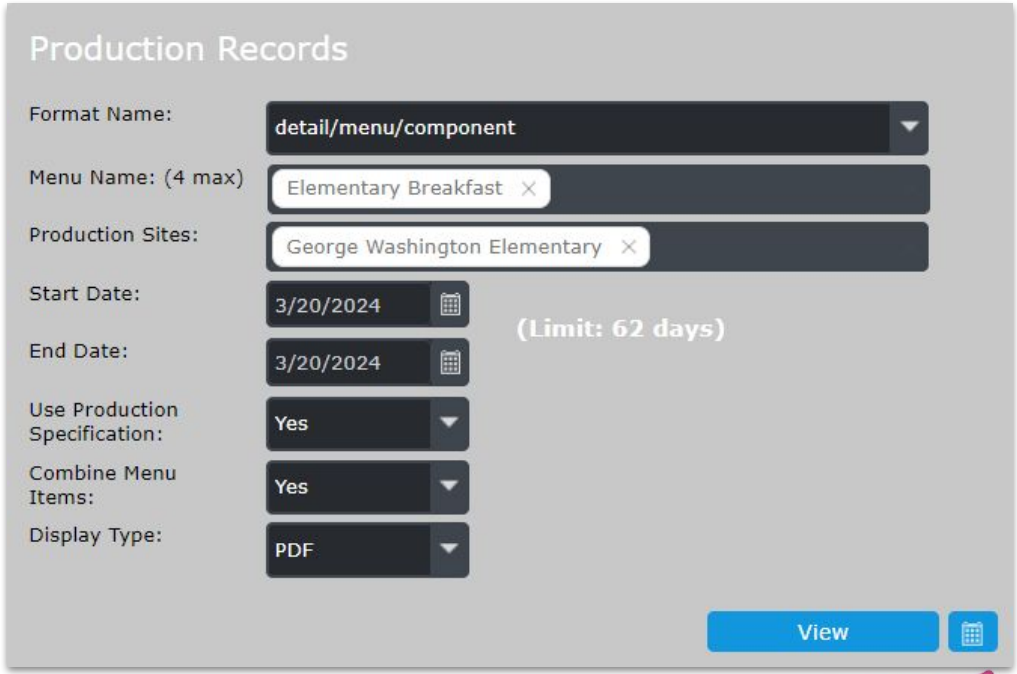
Putting your new format to use

Once you've created a custom production record format, it's time to put it to use!

- Navigate to **Reports > Menu Planning > Production Records**
- Select format, menu(s), production site(s), and date range
- Click View to generate now, or use the calendar icon to schedule your production record



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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