CONNECT **Mosaic BOH | Here to help: Answers to most-asked support** questions and more PRESENTED BY: KRISTIN DUSETT

Agenda

FAQs

- Setup
- Menus and Inventory

• More!

Resources

- Self Help
- In-app Learning



User Management

...

Why doesn't this user see the same options I do?

- Some of the navigation tabs
 I see are not visible to
 another user
- Another user cannot select the same sites that I can

- Program access is determined by a user's *security group* assignment
- Site visibility is determined by a user's *site* assignment



How do I remove a user from my Mosaic database?

- I have a user who will be on leave and will not need to access Mosaic during that time
- I have a user who has left the district and needs to be removed from the database permanently

- Users can be Deactivated to temporarily remove access to Mosaic
- Once deactivated a user can be deleted permanently from the Mosaic database

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sername:	pohnG@kdschools.com						
ame:	John G						
assword:							
onfirm Password:							
mail:	JohnG@kdschools.com						
ecurity Groups:	Site Manager ×						
ite Groups:							
ndividual Sites:	Frederick Douglass Elem	entary ×					
						Deactive	
			Palet-				
		Activate	Delete	Cancel	Save		
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Can the same user access both Mosaic FOH and BOH?

 I have a user who can log into Mosaic FOH but not Mosaic BOH

- Mosaic FOH and BOH are separate programs and will require separate user profiles to be set up
- You can link the same FOH and BOH user profile to just one MySchoolBucks account





Ingredients & Recipes

...

How do I add an ingredient?

- I have new ingredients to add to the program
- This is my first time adding an ingredient OR I haven't added an ingredient in a while
- Can you make sure I'm adding this correctly?

- Ingredient nutrients should be added directly from the nutrient fact label. We can add measurements for different portion sizes
- Allergen hazards contained in the ingredient should be indicated
- Costing information can be added
- Bulk import option available



How do I add a recipe?

- I have new recipes to add to the program
- This is my first time adding an recipe OR I haven't added an recipe in a while
- Can you make sure I'm adding this correctly?

- Amount of ingredients should be enough to produce the number of portions indicated
- Food based component & subgroup contribution amounts should be indicated
- Use Quick Recipe to save time



Reimbursable Meals & Weekly Requirements

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Why is my Weekly Requirements Report blank?

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				۷	Veekly	Certifie	cation \	Norksh	neet						
Elementary Brkfst-Traditiona	d I				Br	eakfast l	K-5 (age	5-10)						Week of 2	2/7/2
5 Day Week	Mon 02/07/22	Tue 02/08/22	Wed 02/09/22	Thu 02/10/22	Fri 02/11/22			Weekly Total	Weekly Rqmt.	Weekly Rqmt. Check	Weekly Fruit Juice Limit Check (no more than	Total Weekly Fruit	Total Weekly Fruit Juice	% of Total Weekly Fruit that is Juice	We Ri Ci
Fruit: Minimum (cups)								0	5	NO	half of Total Fruit)	0	0	0%	3
Vegetables: Minimum (cups)							2	0	N/A	N/A					
-Dark Green							-	0	N/A	N/A	Weekly Veg. Juice	Total	Total	% of Total Weekly	al w
-Red/Orange							4	0	N/A	N/A	Limit Check (no more than	Weekly Veg.	Weekly Veg.	Veg. that is	R
-Beans & Peas (Legumes)							4.	0	N/A	N/A	half of Total Veg.)		Juice	Juice	
-Starchy							4	0	N/A	N/A]				
-Other							5	0	N/A	N/A		0	0	0%)
Meat/Meat Alt: Minimum (oz eq)								0	N/A	N/A					
Meat/Meat Alt: Maximum (oz eq)							5	0	N/A	N/A					
Grain: Minimum (oz eq)								0	7	NO					
Grain: Maximum (oz eq)							le .	0	10	Yes					
Gi	rain Based	Dessert To	tal for all we	ekly meals				0	No more than 2 oz	Yes					
Whole Grain Rich Weekly Amount	Weekly Grains Total	0	Weekly Whole Grain Rich Total	0	% of Whole Grain Rich	0%			50% Whole Grain Rich	NO					
	Mon 02/07/22	Tue 02/08/22	Wed 02/09/22	Thu 02/10/22	Fri 02/11/22			Weekly Total	Weekly Rqmt.	Weekly Rqmt. Check					
Milk: Minimum (cups)								0	5	NO					
Variety: Skim/Fat-free unflavored, Skim/fat-free flavored, Low-fat(1% or less) unflavored, Low-fat(1% or less), flavored	NO	NO	NO	NO	NO						-				
Reduced fat(2%) or whole, unflavored and flavored															
** Cells with this background color s	signify Requ	uirements n	ot being me	ətl											

Heartland School Solutions

- I have built my menu days
- My recipes have been set up to contribute the proper food based components
 Answer:
- Reimbursable Meal Groups need to be created to populate the Weekly Requirements Report

Why is my Reimbursable Meal Group not meeting requirements?

- I am in the process of adding a new reimbursable meal group
- The recipes I am selecting are not satisfying my daily food based component requirements

Component	Subgroup	Required Minimum	Daily Check	
Meat/Meat Alt	M/MA oz eq	1.000 oz eq	2.000	0
Grain	Grain oz eq	1.000 oz eq	1.500	0
	Whole Grain Rich oz eq		1.500	
	Grain Based Dessert oz eq		0.000	
Fruit	Fruit cups	0.500 cup	0.000	0
	Fruit Juice cups		0.000	
Vegetables	Vegetable cups	0.750 cup	1.000	0
	Vegetable Juice cups		0.000	
Milk	Milk cups	1.000 cup	1.000	0

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Why is my Reimbursable Meal Group not meeting requirements?

- I am in the process of adding a new reimbursable meal group
- The recipes I am selecting are not satisfying my daily food based component requirements

- Recipe component crediting is missing
- The recipes you've selected are not contributing enough





Menu Sharing

...

Can I display my Mosaic menus on my district's website?

- I have built a months worth of menus
- I want to show my students and their parents what will be offered
- Having my menu online would make it more accessible

- Yes! The Menu Plan Calendar report has a web export option which can include nutrient and allergen information
- MBOH can integrate with MealViewer



Can I share Recipes and Ingredients with other districts in Mosaic?

- I have recipes in my database that
 I'd like to share with another district
- Another district has offered to share their recipes with me

- Yes! Share your recipes to the Community using the "share" button on the recipe page
- Download recipes that other districts have shared by searching the Community
- Search the Community by nutrient or component information, or by district

	I/R	Item #	CN Code	Description	Measure	Step
1 STALLON	I	20081	20081	WHEAT FLR, WHITE, ALL-PURPOSE, ENR, BLEACHED	9 LB	1
	I <u>18369</u> 18369			LEAVENING AGENTS, BAKING PDR, DOUBLE-ACTING, NA	5 oz	1
	I	<u>2047</u>	2047	SALT,TABLE	2 TBSP + 2 tsp	1
	Ι	799915		MARGARINE, REG, HARD, SOYBN (HYDR)&CTTNSD	6 LB	1
UT BUTTER COOKIES	Ι	19335	19335	SUGARS, GRANULATED	7 LB + 3 oz	1
1: 300 EACH	I	1123	1123	EGG,WHOLE,RAW,FRESH	32 large	1
o Schools	I	2050	2050	VANILLA EXTRACT	.5 CUP	1
	Ι	51540	51540	Peanut Butter, Smooth	30 (2 TBSP)	1



Inventory Management

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How can I get my new products and prices into Mosaic?

- I have a lot of new inventory products to add to Mosaic
- I have received new bid prices from vendors, and I need to update those prices in Mosaic

- Products and Price Lists can be added manually, or they can be imported via spreadsheet.
- Contact support for the appropriate spreadsheet, fill it out and return it, then we will import the information into Mosaic free of charge!

Description	Product Category	Product Number	Item Number	Purchase Unit Description	Purchase Unit Weight Amount	Purchase Unit Weight Measure	Stock Unit Description	Stock Units per Purchase Unit



How do I fix a transaction with incorrect information?

- A user committed an inventory transaction with the wrong quantity
- A user committed a Physical Count with the wrong quantity

- Once a transaction is committed we cannot edit it, but we can correct our inventory with an Adjustment
- Perform an Adjustment to add or remove stock to correct the On-Hand quantity

te:	George Washing	gton Elementary
uantity on Hand:	3 Case (6/#10)), 0 #10 Can
djustment Type:	Subtract (-)	*
urchase Unit Adjustment Amount:	1	Case (6/#10)
tock Unit Adjustment Amount:	0	#10 Can
ljustment Reason:	Count Correctio	n
omment: Entered incorrect quantity for Physica	al Inventory on 2/28	4
omment: Entered incorrect quantity for Physica	al Inventory on 2/28	1
omment: Entered incorrect quantity for Physica	al Inventory on 2/28	Commit Save
omment: Entered incorrect quantity for Physica	al Inventory on 2/28	Commit Save
omment: Entered incorrect quantity for Physica	al Inventory on 2/28	Commit Save

How should I handle a product we no longer use?

- I am no longer using a product, what is the proper way to deal with this?
- We are no longer ordering a product, but are still using it

- A product that is still on hand, but is no longer being ordered can be discontinued
- A product that is no longer in use can be deactivated and zero'd out

Status:	Discontinued	
Commodity:	Available	
Default Commodity Value	Discontinued	
Default commonly value.		





Physical Counts

...

Can I delete a Physical Inventory session?

- Two sessions were accidentally opened for the same month
- An old session has a partial percentage complete

- A Physical inventory session can be deleted as long is it is 0% complete – no quantities have been committed
- A Physical Inventory session cannot be deleted once any quantities have been committed, it will then need to be completed





Why can't I save my physical count?

 I'm adding my site's physical count but I can't select the save button

- As you input your product counts into the program, they are being saved automatically
- The only time you will see the save button selectable is if the auto-save is interrupted (e.g. poor or dropped internet connection)





Reports & Production Records

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My Report/Production Record does not show anyquantities

- Running the Menu
 Spreadsheet for Nutrient
 Analysis no quantities
 populate
- Production Record that should pull Planned production quantities is blank

Answer:

 Mosaic reports are able to pull numbers from multiple areas of the program – make sure the appropriate production quantities are filled in!

			Plani	ned	Offe	red		Ser	ved
Recipe Name		Portion	Reim- burse	A La Carte	Reim- burse	A La Carte	Reim- burse	A La Carte	Short Leftover
Meal Totals			250	0	0	0	0	0	0
VEG&FRUIT SELF SERVE:K-8	<u>PQ History</u>	Servings	100	0	0	0	0	0	0
ROLLS, DINNER, WHOLE WHEAT	PQ History	Each 1 oz	85	0	0	0	0	0	0
TOASTED CHEESE SANDWICH:	PQ History	SERVINGS	100	0	0	0	0	0	0
BROCCOLI: fresh, boiled	<u>PQ History</u>	CUP	75	0	0	0	0	0	0
PEARS, cnd, Lt Syrup	PQ History	CUP	125	0	0	0	0	0	0
ORANGES	PQ History	EACH	100	0	0	0	0	0	0
CHOCOLATE CHIP COOKIES	PQ History	EACH	225	0	0	0	0	0	0
MILK,1% LOWFAT	PQ History	HALF PINT	150	0	0	0	0	0	0
MILK,NONFAT CHOCOLATE	<u>PQ History</u>	Half Pint	80	0	0	0	0	0	0
MILK,Skim	PQ History	HALF PINT	20	0	0	0	0	0	0

Can I Customize a Production Record?

- Can I decide what information is included in my production records?
- I have specific requirements I need to meet with my production records

Answer:

- Production Records can be customized with different formats
- Choose what information to include, and adjust the layout and column order to your needs

Hon	ne 🗲 Setup	> Production Record I	Formats > Edit : Lunch Production Record Format
Con	Dage	Cotup	
Gen	erai Page	e Setup	
Form	at Name:	Lunch Production R	ecord Format
Repo	rt Heading:	Heartland Lunch	
#	Column Ty	pe	Column Header
1	Recipe Num	<u>iber</u>	Recipe
2	Recipe Nam	<u>ie</u>	Recipe Descriptions
3	Portion Size	2	Portion Size
4	Planned Qty	<u>/ - Reimbursable</u>	Planned Reimb- ursable
5	Offered Qty	- Reimbursable	Offered Reimb- ursable
6	Served Qty	- Reimbursable	Served Reimb- ursable
7	Total Food (Cost	Total Food Cost
8	Waste		Waste
9	Blank Colur	nn (hand filled)	Comments

JECT

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Answer:

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Heartland School Solutions

- Heartland Lunch
- Mon 12/5/2022

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		

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Signature ____

How can I streamline my day?

- Are there any tips for how I can streamline my day?
- What can Mosaic do to help use mine and my managers' time more effectively?

- Production Records can be scheduled to run automatically
- Set parameters and frequency to send regular Production Records right to your reports inbox





Self-Help Resources

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Self Help Resources





What's New for You

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What's New for You

Access information on the latest version of Mosaic from the What's New for You link in the Communication Banner on the home page



- New Features and Improvements
- Option to include portion size in the Menu Calendar Export Now you have the option to include the portion size in the menu calendar
 export so that you no longer need to include the portion size in the recipe name.
- Ordering Option to bulk approve vendor purchase orders We've added the ability to bulk approve purchase orders so that you can save time when having to approve multiple purchase orders.
- Ordering Option to bulk approve warehouse orders We've added the ability to bulk approve warehouse orders so that you can save time when having to approve multiple warehouse orders.



Additional Resources

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Additional Resources - Heartland Univ.

- Click Register here
- Code: LEARNMOSAICBOH





Heartland University Registration

Register

- Receive an Email Link
- Begi

egin Online Courses	Mosaic - Back of House Learning Path
Online Courses Self Sign Up	E Courses O More information Additional References
Register to access courses by entering the code provided to you	
First Name:	✓ Administrators
Last Name:	Mosaic - Back of House - Welcome to Menu Planning
Email:	Mosaic - Back of House - Welcome to Menu Planning Mosaic - Menu Planning - Functions - Introduction
We will send account login information to this address Confirm Email:	About this Learning Path
Language	
English 🗸	
Code:	
Register	



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Additional Resources - User Guides



Home > Help	
Nosaic Back of the House Documentation	
User Guide	
User Guide - Mosaic BOH Companion App	
Using the Yield Factor Method	
HSS Online Learning	
Login to HSS University	
Conversion Calculator	
Conversion Calculator	
Support	
Phone: 800.256.8224	
Hours of Operation: Mon-Fri 7am -7pm ET Email: <u>MosaicMPSupport@e-hps.com</u>	
Remote: WebEx	



General Support - Knowledge Articles



Note: Checkbox next to Mosaic BOH





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



