



CONNECT

**Elevate parent communication &
program performance with Mosaic
Reporting**

PRESENTED BY Brandon Collie



Agenda

- End of Day Report Generation
- Report Scheduling
- New Reports
- What to do if you do not see a report
- Letter Setup

The background features abstract, organic shapes in shades of orange, purple, and blue. There are several clusters of small dots in various colors (purple, orange, pink) and dashed lines in orange and pink, scattered across the white central area.

End of Day Report Generation

Close Day Reports

- End of Day > Close Day Reports

The screenshot shows a software interface with a red header bar labeled "End of Day". Below the header is a grid of menu items, each with a red arrow icon on its right side. A blue arrow points to the "Close Day Reports" item.

End of Day	
Close Day	Review Transactions
Reconcile Day	Meal Eligibility Correction
Bank Deposit Count	Bulk Entry Form
Close Day Reports	Settings

Available Close Day Reports

- Account Activity
- A la Carte
- A la Carte by Serving Line
- Cashier Deposit
- Daily Reconciliation
- Daily Sales
- Daily Sales Recap
- Edit Check
- Extended Sales
- Grade Percentile
- Meal Report
- Prepay
- Sales Overview
- Serving Line Sales
- Special Provisions Edit Check
- Standard Claim
- Student Meal
- Transaction History
- Void Transaction

Close Day Report: Parameters

- Update the filters to limit the data shown when the report runs

End of Day > Close Day Reports Search > Close Day Reports Maintenance

Close Day Report Information

Name:*

Report:*

School Group:*

School:*

Parameters

Name	Value
School Group	
School	
StartDate	Today
EndDate	Today
Serving Period	
Activity Type	Deposit
Report Type	Summary

Parameter Information

School Group:

School:

StartDate:

EndDate:

Serving Period:

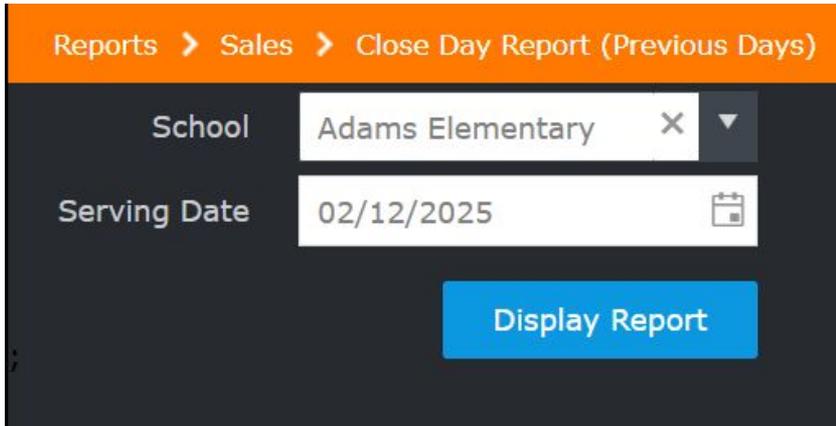
User:

Activity Type:

Report Type:

Bulk Close Day Reports

- Reports > Sales > Close Day Reports (Previous Days)
- Close Day Reports can now be run for previous days without needing to reopen and close the day
- Will include all reports currently assigned to the specified school in close day

A screenshot of a web application interface for generating reports. At the top, a breadcrumb trail reads "Reports > Sales > Close Day Report (Previous Days)". Below this, there are two input fields: "School" with the value "Adams Elementary" and a dropdown arrow, and "Serving Date" with the value "02/12/2025" and a calendar icon. A blue button labeled "Display Report" is positioned below the date field.

Reports > Sales > Close Day Report (Previous Days)

School Adams Elementary

Serving Date 02/12/2025

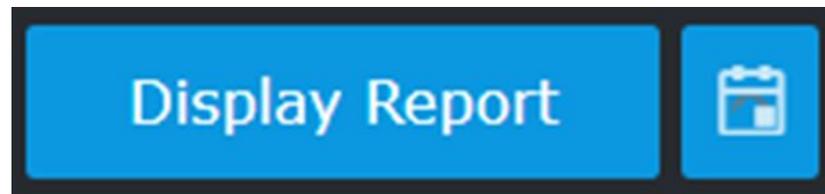
Display Report



Report Scheduling/Management

Report Scheduling

- Scheduling reports is a great option if you need a specific report on a recurring basis
 - Remember to add your email address
- If you see the calendar icon next to “Display Report” that means you can schedule it
- We recommend scheduling/emailing any report that does not have a date selection



Report Scheduling

Start

Start Time:

Recurrence Pattern

Daily Every day(s)

Weekly Every Weekday

Monthly

Yearly

Range of Recurrence

Start:

No End Date

End after: occurrences

End by:

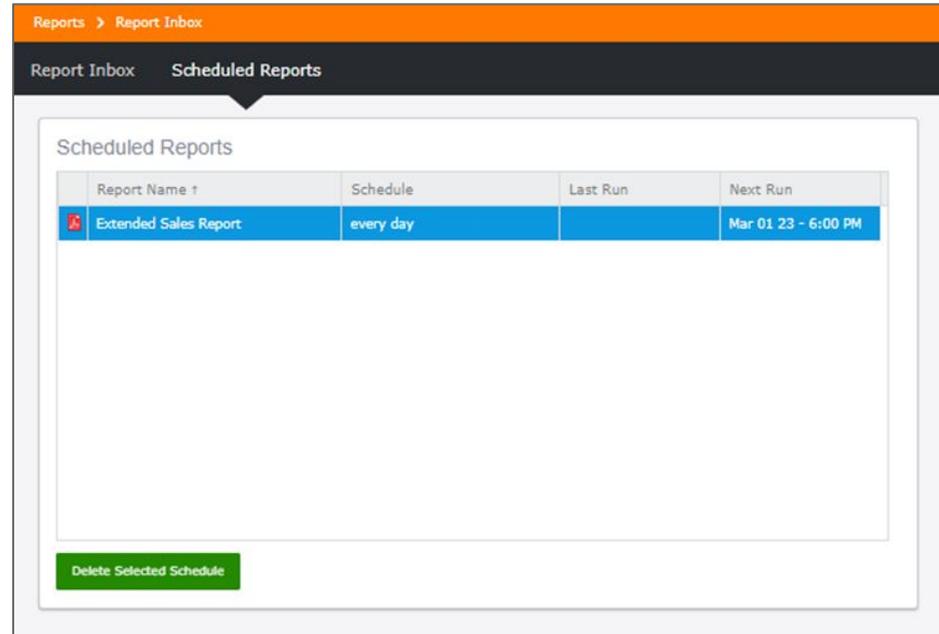
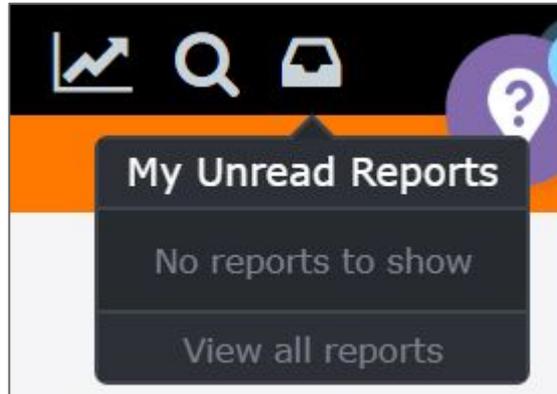
Email

Send To:

Separate multiple email addresses with a semicolon(;)(50 max)

Managing Scheduled Reports

- Click the report bin in the upper right corner
 - Choose view all reports



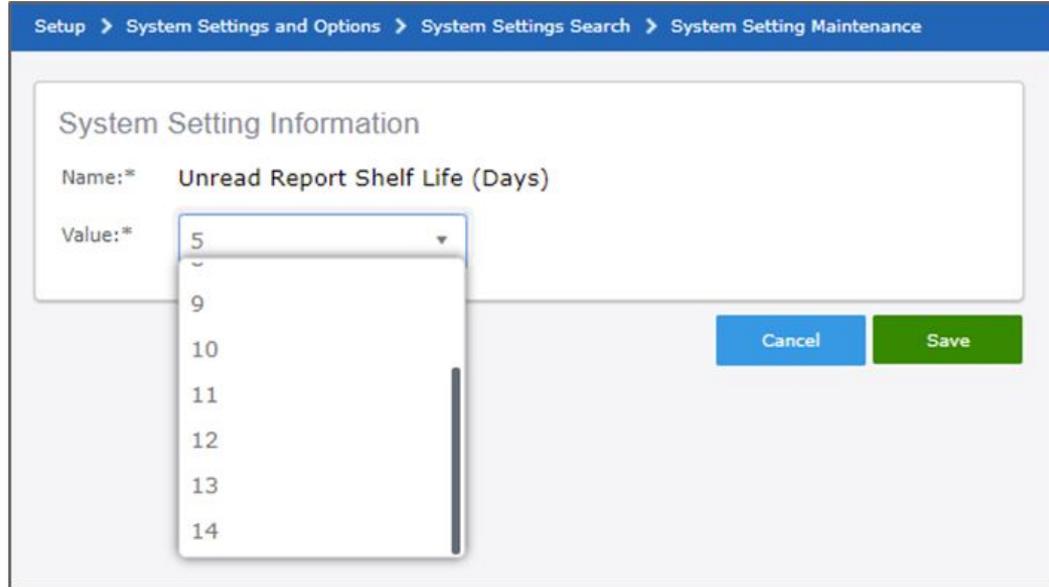
Managing Schedule Reports

- Click “Scheduled Reports”
- Double click any of the scheduled reports to view the filters used

Parameters	
Current User	HSS Trainer
District Name	Heartland School District
Is Director	Yes
School Group	1 - All Schools
School Group Name	1 - All Schools
School	Adams Elementary
Active	Yes
Order By	LastName
Report Type Description	Daily without Balance/Status
Include Medical Alerts	Yes
Include Serving Line Note	Yes
Include Photo	No
Display Type	PDF
Group By Homeroom	Yes
Display Balance Status	No
Concurrent Enrollment	No
Email Address	brandon.owens-collie@e-hps.com

Unread Report Shelf Life

- Setup > System Settings & Option > System Settings > Central Tab > Unread Report Shelf Life
- Reports can be scheduled to stay in your Mosaic inbox up to 14 calendar days
- Does not affect reports sent to your email



The screenshot shows a web interface for configuring system settings. The breadcrumb trail at the top reads: Setup > System Settings and Options > System Settings Search > System Setting Maintenance. The main content area is titled 'System Setting Information' and contains the following fields:

- Name:* Unread Report Shelf Life (Days)
- Value:* A dropdown menu currently showing '5'. The dropdown list is open, showing options: 5, 9, 10, 11, 12, 13, and 14.

At the bottom right of the form, there are two buttons: a blue 'Cancel' button and a green 'Save' button.

The background features a central white space surrounded by abstract, organic shapes in shades of orange, purple, and blue. These shapes are decorated with various elements: dashed lines, solid lines, and clusters of small dots in colors matching the background. The overall aesthetic is modern and artistic.

New Reports

New Reports

- Custom Financial Export
- Close Day Reports
- Item Sales Summary by Grade
- CSV Report option
 - Daily Elig Snapshot
 - Student Listing as of Date
 - Elig Record Report

Custom Financial Export Fields

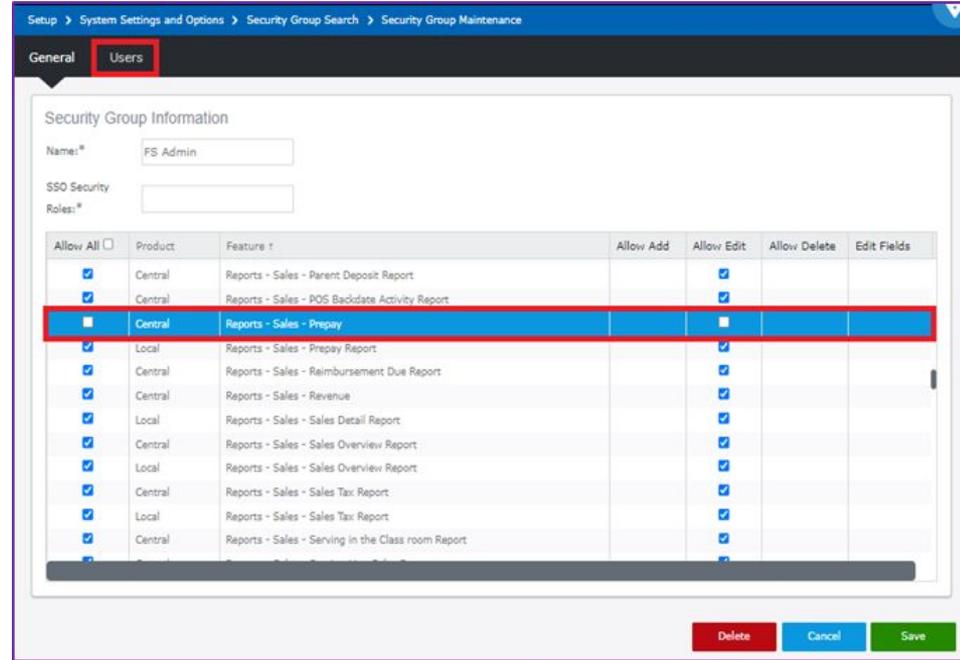
Name	Header Name	Start Position	End Position	Default Value	Format
Actual Deposit	Actual Deposit	1	0		Decimal
Actual OverShort	Actual OverShort	2	0		Decimal
Ala & Dept Count	Ala & Dept Count	3	0		
Declared Income	Declared Income	4	0		Decimal
Declared OverShort	Declared OverShort	5	0		Decimal
Elig-Ala & Dept Amount	Elig-Ala & Dept Amount	6	0		Decimal
Elig-Charges Collected	Elig-Charges Collected	7	0		Decimal
Elig-Deposit Amount	Elig-Deposit Amount	8	0		Decimal
Elig-Refund	Elig-Refund	9	0		Decimal
NElig-Ala & Dept Amount	NElig-Ala & Dept Amount	10	0		Decimal
NElig-Charges Collected	NElig-Charges Collected	11	0		Decimal
NElig-Deposit Amount	NElig-Deposit Amount	12	0		Decimal
NElig-Refund	NElig-Refund	13	0		Decimal
NR-F/R/P Meal Amount	NR-F/R/P Meal Amount	14	0		Decimal
NR-F/R/P Meal Count	NR-F/R/P Meal Count	15	0		
NR-Free Meal Amount	NR-Free Meal Amount	16	0		No Decimal
NR-Free Meal Count	NR-Free Meal Count	17	0		
NR-Meal Amount Total	NR-Meal Amount Total	18	0		No Decimal

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What to do if you do not see a report

What to do if you do not see a report

- If any of the reports or settings we have talked about today are not visible to you, it is not a part of what you have access to via your **Security Group**
- To enable these reports or settings, go to Setup > System Settings and Options > Security Group > Security Group Maintenance
 - Search for your security group
 - Use Ctrl + F to search the list for the report or setting
 - Check the box that is on the same line as the report or setting you want to see when you



The screenshot shows the 'Users' tab in the 'Security Group Maintenance' interface. The 'Security Group Information' section shows 'Name: FS Admin' and 'Roles:'. Below is a table with columns: 'Allow All', 'Product', 'Feature', 'Allow Add', 'Allow Edit', 'Allow Delete', and 'Edit Fields'. The row for 'Reports - Sales - Prepay' is highlighted with a red box, and its 'Allow All' checkbox is unchecked. Other rows have their 'Allow All' checkboxes checked.

Allow All	Product	Feature	Allow Add	Allow Edit	Allow Delete	Edit Fields
<input checked="" type="checkbox"/>	Central	Reports - Sales - Parent Deposit Report		<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	Central	Reports - Sales - POS Backdate Activity Report		<input checked="" type="checkbox"/>		
<input type="checkbox"/>	Central	Reports - Sales - Prepay		<input type="checkbox"/>		
<input checked="" type="checkbox"/>	Local	Reports - Sales - Prepay Report		<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	Central	Reports - Sales - Reimbursement Due Report		<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	Central	Reports - Sales - Revenue		<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	Local	Reports - Sales - Sales Detail Report		<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	Central	Reports - Sales - Sales Overview Report		<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	Local	Reports - Sales - Sales Overview Report		<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	Central	Reports - Sales - Sales Tax Report		<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	Local	Reports - Sales - Sales Tax Report		<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	Central	Reports - Sales - Serving in the Class room Report		<input checked="" type="checkbox"/>		

Buttons: Delete, Cancel, Save

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Letter Setup

Letter Setup

- Familiarize yourself with the different merge fields available
 - Tags Letter
- [Automate Balance emails](#)
- Use for more than Balances
 - General policy changes that will affect parents/students/adults
 - Encourage application or income form completion
 - Encourage MSB parent sign up
 - Use links

Thank you

CONNECT