CONNECT

Elevate parent communication & program performance with Mosaic Reporting

PRESENTED BY Brandon Collie

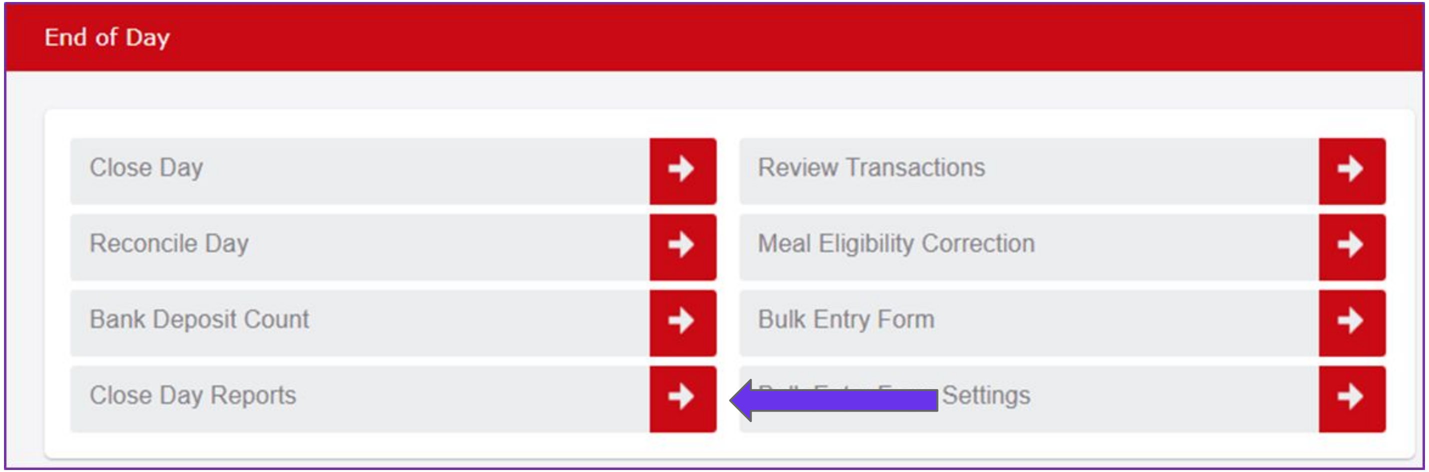
Agenda

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

End of Day Report Generation

Close Day Reports

- End of Day > Close Day Reports



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

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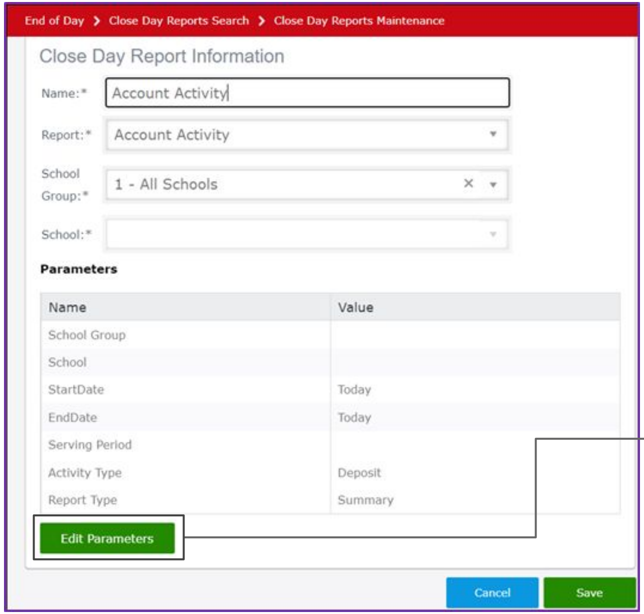
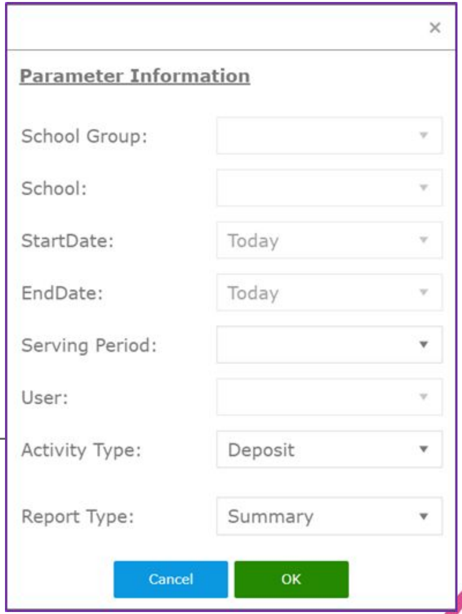
Close Day Report: Parameters

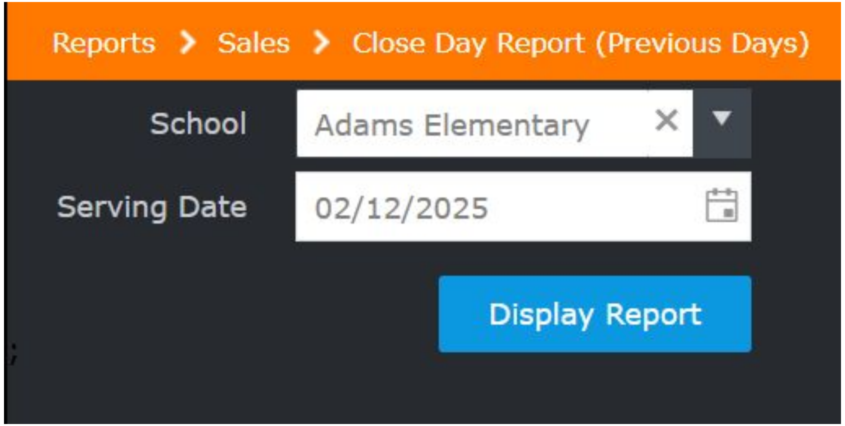
- Update the filters to limit the data shown when the report runs





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



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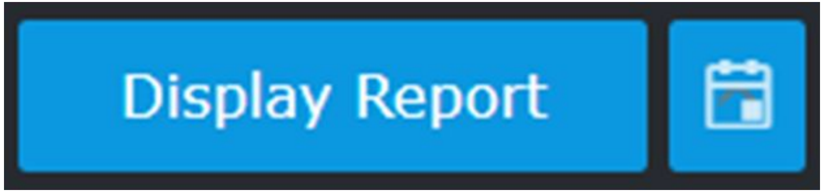
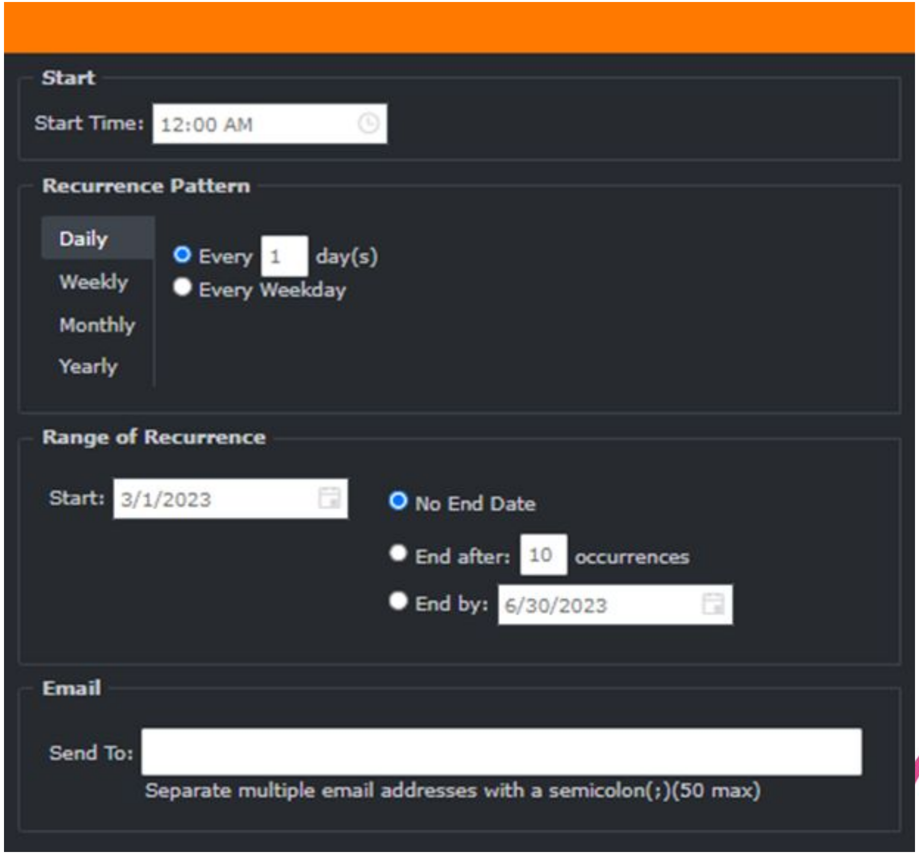
Report Scheduling/Management

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

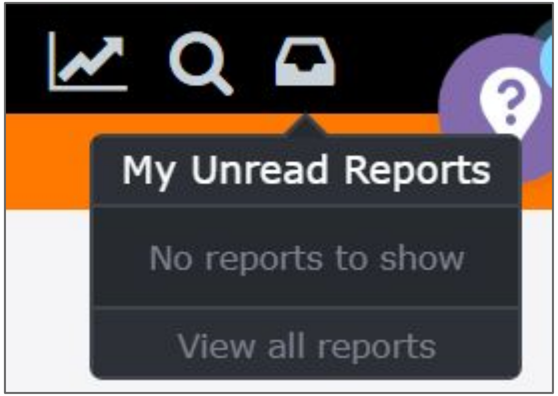


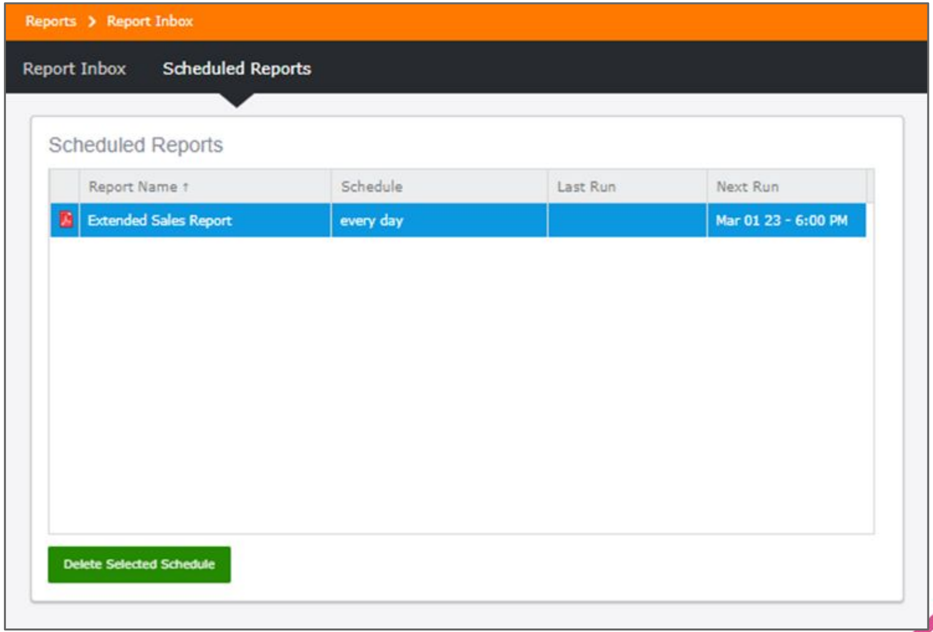
Report Scheduling



Managing Scheduled Reports

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





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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

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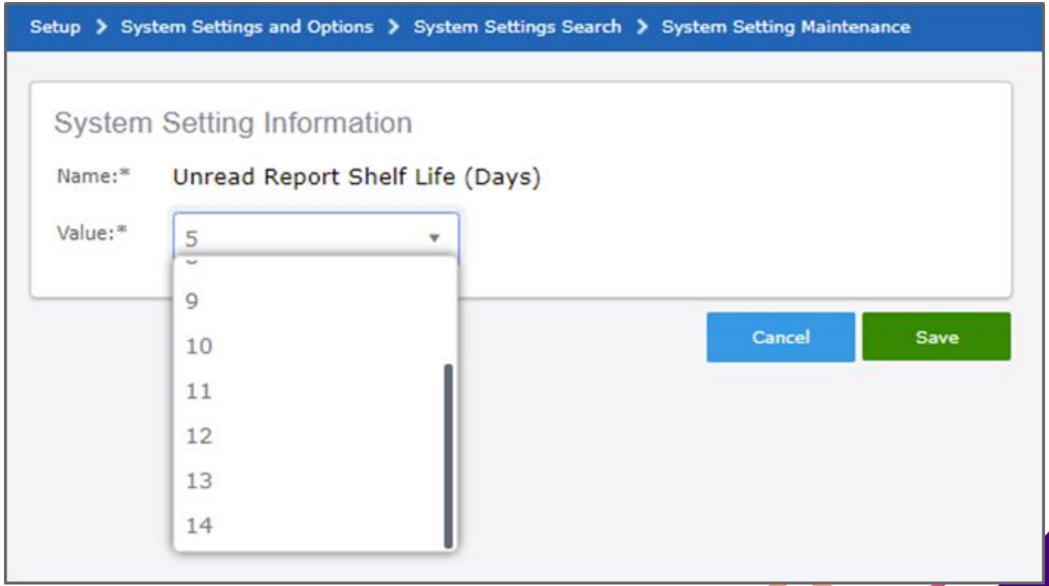
Unread Report Shelf Life

- 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



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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

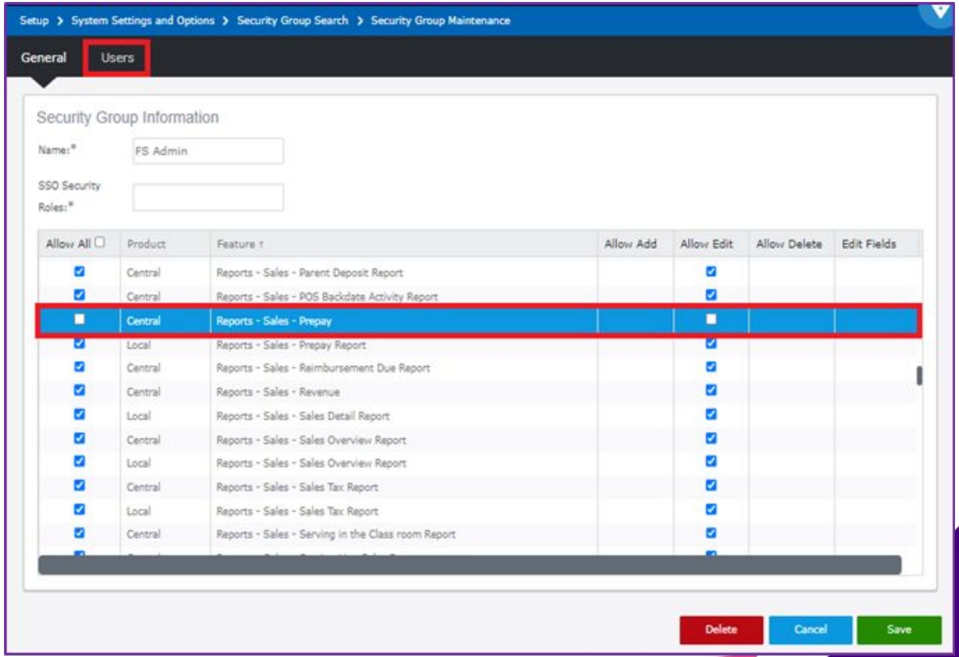
Custom Financial Export Fields

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

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
    - 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



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

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