



# User Guide

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Mosaic Back of House User Guide  
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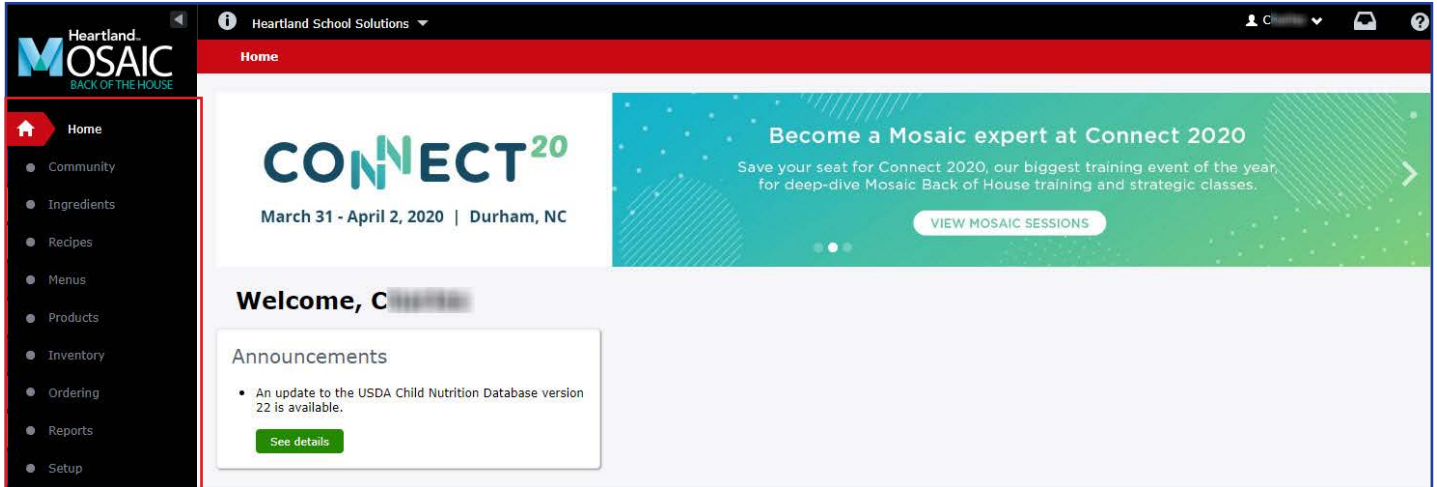
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# INTRODUCTION

## Introduction

Once logged in, you are greeted by the Home screen. This screen shows Announcements and news about Mosaic.

The Mosaic Back of the House software is separated into sections. You can access the modules from the tabs located on the left-hand navigation bar.



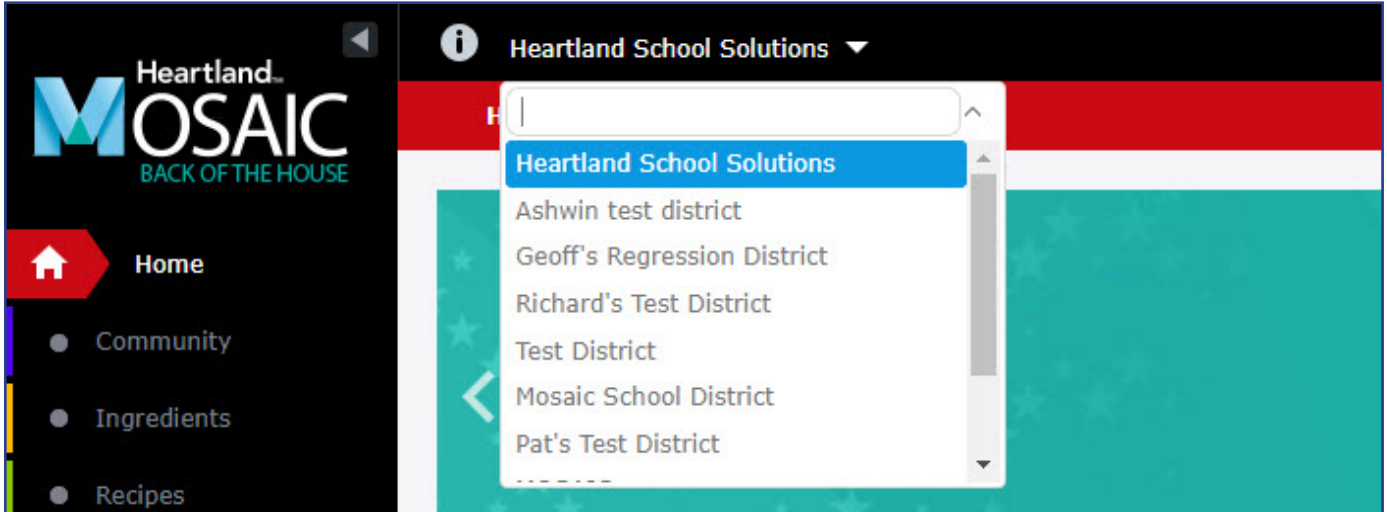
The following table provides a brief description for each tab.

Tab	Description
Home	The Home tab is where the Welcome screen displays.
Community	The Community tab lets you share recipes and download new recipes uploaded by other Mosaic users.
Ingredients	The Ingredients tab represents the inventory of products that you typically store in your freezers, store rooms, or walk-in coolers.
Recipes	The Recipes tab lets you add and manage the menu items that are available on the serving line.
Menus	The Menus tab allows you to enter menus based on the recipes you will serve, establish the menu names, and set your target nutrient standards.
Products	The Products tab allows you to define items (such as food items, paper goods, and cleaning products) as well as manage categories, price lists, and vendors that distribute supplies to your organization.
Inventory	The Inventory tab allows you to track on-hand items and manage cost information associated with your inventory.
Ordering	The Ordering tab allows you to create vendor orders and warehouse orders that are delivered to your sites.
Reports	The Reports tab provides the ability to print various reports.
Setup	The Setup tab allows you to manage other Mosaic information, including allergens, exceptions, security groups, site information, and user information.

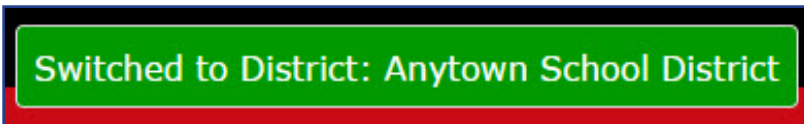
# INTRODUCTION

## Selecting Your District

Multi-district users may switch their selected district without logging out. For users who have access to multiple districts, the currently selected district will display at the top of the window. Click the **down arrow** next to the displayed district to open a menu that allows you to select a different district. You can also search for a specific district using the search field within the drop-down menu.



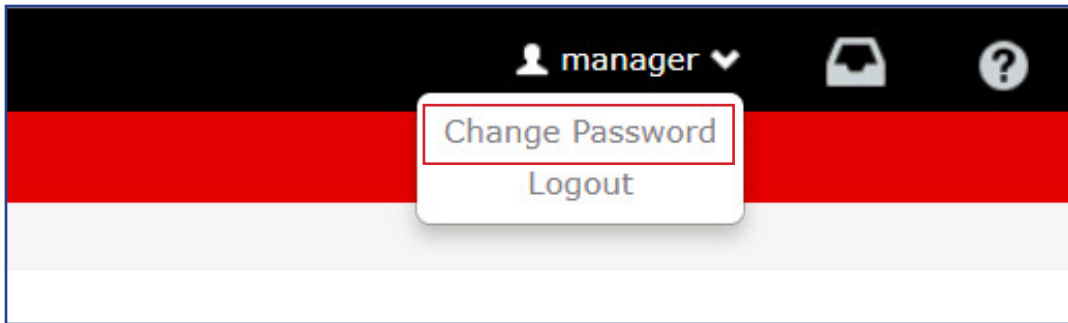
After selecting a district, a message will appear confirming that you have changed districts.



# INTRODUCTION

## Changing Your Password

If you would like to change your password in Mosaic Back of the House, from any tab, click your name that appears in the upper right corner of the window. Select the option **Change Password**.



After clicking Change Password, you will see a new screen where you can enter a new password. Enter your current password at the top, then enter your new password in the middle field, and confirm your new password in the last field.

When you have entered your password information, click **Save** to change your password.

A screenshot of the "Change Password" form. The form is titled "Change Password" and has three input fields: "Current Password:", "New Password:", and "Confirm Password:". Each field contains a series of dots representing masked text. At the bottom right of the form are two buttons: "Cancel" (blue) and "Save" (green).

# INTRODUCTION

## Help

The Help option provides multiple options to assist with questions that may arise during day-to-day tasks.

1. From the top navigation panel, click the **Question Mark** icon.
2. Select the option that best suits your help needs.

The screenshot shows a help menu with four main sections. The first section, 'Mosaic Back of the House Documentation', contains three items: 'User Guide', 'User Guide - Mosaic BOH Companion App', and 'Using the Yield Factor Method'. The second section, 'HSS Online Learning', contains one item: 'Login to HSS University'. The third section, 'Conversion Calculator', contains one item: 'Conversion Calculator'. The fourth section, 'Support', contains contact information: 'Phone: 800.256.8224', 'Hours of Operation: Mon-Fri 7am -7pm ET', 'Email: [MosaicMPSupport@e-hps.com](mailto:MosaicMPSupport@e-hps.com)', and 'Remote: [WebEx](#)'. Each item in the first three sections has a red arrow icon to its right.

## Mosaic Back of the House Documentation

Mosaic Back of the House Documentation provides you with quick access to PDF files for the User Guide and Using the Yield Factor Method.

To access documentation, click on the appropriate link. The PDF document will open in another tab.

This screenshot shows a zoomed-in view of the 'Mosaic Back of the House Documentation' section from the help menu. It lists two items: 'User Guide' and 'Using the Yield Factor Method', each with a red arrow icon to its right.

## HSS Online Learning

The HSS Online Learning section provides a link to HSS University, a site that provides access to e-learning courses designed to help you use Mosaic more effectively. To access HSS University e-learning, click **Login to HSS University**.

**Note:** In order to log in to HSS University, you will need to register for a free HSS University Litmos account. An e-learning access code is provided upon clicking "Login to HSS University."

This screenshot shows a zoomed-in view of the 'HSS Online Learning' section from the help menu. It lists one item: 'Login to HSS University', with a red arrow icon to its right.

## Conversion Calculator

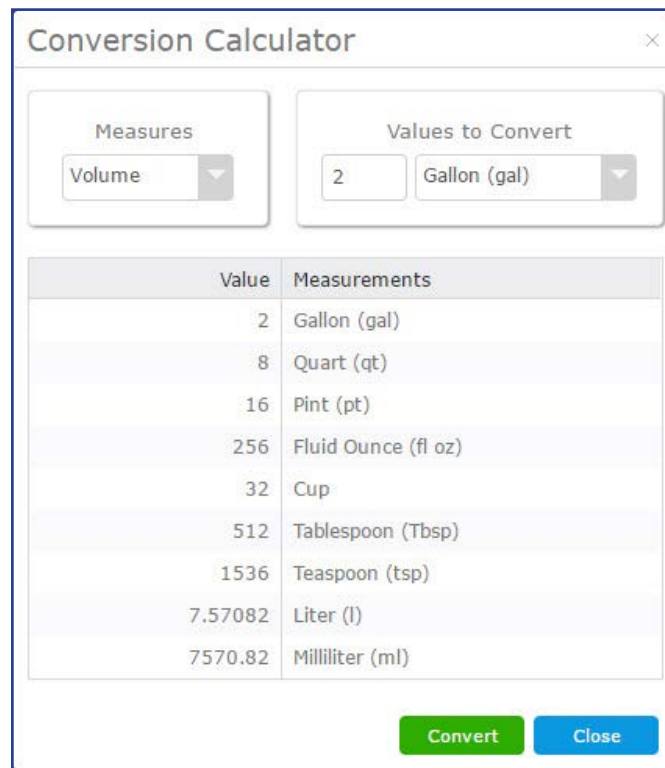
Mosaic includes a conversion calculator tool for menu planning. The conversion calculator allows you to convert volume and weight measurements in a new tab while planning menus in a previous tab.

The conversion calculator is located in the Help menu.

After the Help menu opens, click **Conversion Calculator** to open the conversion calculator tool.



Under **Measures**, select Volume if converting volume measurements, such as cups, or select Weight if converting weight measurements, such as pounds. Under **Values to Convert**, select the measurement type and enter the quantity. When you have entered a quantity with a measurement, click **Convert** and the table will show the equivalent quantities for each other measurement.

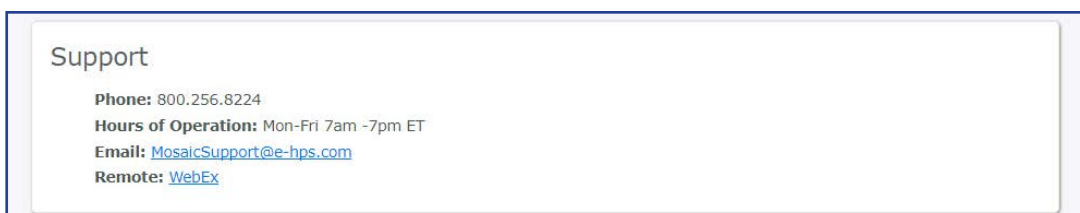


The screenshot shows the "Conversion Calculator" window. It has a title bar with a close button (X). Below the title bar, there are two sections: "Measures" with a dropdown menu set to "Volume", and "Values to Convert" with a text input field containing "2" and a dropdown menu set to "Gallon (gal)". Below these sections is a table with two columns: "Value" and "Measurements". The table lists equivalent measurements for 2 gallons. At the bottom of the window, there are two buttons: "Convert" (green) and "Close" (blue).

Value	Measurements
2	Gallon (gal)
8	Quart (qt)
16	Pint (pt)
256	Fluid Ounce (fl oz)
32	Cup
512	Tablespoon (Tbsp)
1536	Teaspoon (tsp)
7.57082	Liter (l)
7570.82	Milliliter (ml)

## Support

Support provides details for Mosaic Back of the House Support such as the toll free phone number, hours of operation, a quick link to create a support email, and remote access when Support staff need to connect to your computer remotely. Select the appropriate Support option based on your needs.



## Menu Planning Process Flow

During menu planning, the process flow for creating menus is as follows: addition or modification of ingredients, creation of recipes from ingredients, creation of menus from recipes.

## Ingredients Definition

Ingredients = Inventory

MOSAIC uses the newest USDA Child Nutrition Database Release including over 4,000 ingredients with nutrient values and the Food Buying Guide. You can also find over 15,000 brand name and industry products including their nutrient analysis. You can add your own local ingredients, modify existing ingredients, and add purchase information.

The screenshot shows the 'USDA' tab for an ingredient. It is divided into two sections: 'USDA Descriptions' and 'Additional Information'.  
**USDA Descriptions:**  
Long Description: Milk, non-instant nonfat dry, reconstituted  
Abbreviated Description: RECONSTITUTING NONFAT DRY MILK  
**Additional Information:**  
CN Code: 50000      Commodity/Recipe Code: A-14  
Source: USDA Standardized Recipe      USDA Status: Active  
Added: 1/30/1994 6:00:00 PM      Modified: 3/27/2011 7:00:00 PM

## Recipes Definition

Recipes = Menu Items

MOSAIC contains recipes from the Almond Board database and others. You can add your own local recipes, modify existing recipes, add instructions (including HACCP), resize the recipes, and more.

The screenshot shows the 'General' tab of a recipe definition form. It contains several input fields and dropdown menus.  
**General:**  
Recipe #: 990042  
Description: [Empty]  
Source: [Empty]  
Group Code: [Empty]  
HACCP Process: [Dropdown]  
Non-Food Recipe: No  
Service Type: [Dropdown]  
Threshold: [Input]  
Image: NO IMAGE AVAILABLE (with camera icon)  
Buttons: Add (green), Remove (red)  
**Portioning:**  
Number of Portions: [Input]  
Portion Size: [Input]  
**Menu Names:**  
Alternate Menu Name: [Input]  
2nd Alternate Menu Name: [Input]  
Exclude Recipe from Calendar Report: No  
Buttons: Cancel (blue), Save (green)

## Menus Definition

Menus are created in calendar or cycle formats, and used to specify portion size and projected meal totals to generate an average nutrient analysis of the menu. You can copy from cycle to monthly calendar, monthly to cycle menus and from one age or grade group to another.

Home > Menus > Menu Search > Edit : 2 - Elementary Lunch-Traditional

General | Recipes | Meal Totals | Reports

Menu #: 2      Serving Period: Lunch  
 Menu Name: Elementary Lunch-Traditional      Age/Grade Group: K-5 (age 5-10)

Today < > January, 2017

Sunday	Monday	Tuesday	Wednes...	Thursday	Friday	Saturday
25	26	27	28	29	30	31
01	02	03	04	05	06	07
08	09	10	11	12	13	14
15	Lunch x	Lunch x	Lunch x	Lunch x	Lunch x	21
22	23	24	25	26	27	28
29	30	31	01	02	03	04

Preview

Import Cycle Menu   Copy   Delete   Cancel

General | Recipes | MealViewer | Meal Totals | Reports

Menu Date: Mon, 02/04/2019      View Type: Portion Size

Prev Day   Next Day

Menu Name:

<sup>1</sup> - denotes required nutrient values.  
<sup>2</sup> -Trans Fat value is provided for informational purposes only, not for monitoring purposes.  
 \* denotes combined nutrient totals with either missing or incomplete nutrient data.  
 \*N/A\* denotes a nutrient that is missing or incomplete for an individual ingredient.

Recipe #	Description	Portion	Planned Reim-burse	Planned A La Carte	Cost	Calories <sup>1</sup> (kcal)	Saturated Fat <sup>1</sup> (g)	Saturated Fat CALS %	Sodium <sup>1</sup> (mg)	Sugars (g)
1	990010 ALMOND CHICKEN PILAF	CUP	<input type="text" value="1"/>	<input type="text" value="0"/>	0.700	231	1.6	6.25%	252	1.5*
2	500114 LASAGNA WITH GROUND BEEF	SERVINGS	<input type="text" value="1"/>	<input type="text" value="0"/>		269	4.7	15.69%	406	*N/A*
3	439 PEAS & CARROTS: frozen,boiled	CUP	<input type="text" value="1"/>	<input type="text" value="0"/>		77	0.1	1.44%	109	7.0
4	86 ORANGES	EACH	<input type="text" value="1"/>	<input type="text" value="0"/>		62	0.0	0.29%	0	12.2
5	900083 MILK,Skim	HALF PINT	<input type="text" value="1"/>	<input type="text" value="0"/>		83	0.1	1.48%	103	12.5
6	900084 MILK,Skim Flavored	HALF PINT	<input type="text" value="1"/>	<input type="text" value="0"/>		83	0.1	1.48%	103	12.5
7	500001 APPLE CRISP	SERVINGS	<input type="text" value="1"/>	<input type="text" value="0"/>	2.050	200	1.6	7.16%	113	*N/A*
					2.750	1005	8.3	7.43%	1085	45.7*

Add   Replace Recipe   Production Quantities   Reim. Meal Groups   Delete   Meal Totals:    Cancel   Save



## Community Overview

The Community tab allows you to view recipes other users have shared, and then import them into your program once you have reviewed them. If there is a recipe that has been shared that contains an ingredient you do not have in your database, importing the recipe will also import and create a new entry for that ingredient.

## Sharing Recipes

If you have a recipe you would like to share with other Mosaic users, you may do so from the Recipes tab using the **Share** button. For more information, read the **Recipes** section of this guide.


**Note:** When sharing recipes, although not required, you have the ability to share recipe allergens with the Community.

General   Ingredients   Nutrients   Batch Quantities   Instruction   Components   Allergens   Notes   Misc   Reports

---

### General

Recipe #: 990006   HACCP Process: #2 Same Day Service  
Description: ALMOND BROCCOLI SALAD W/TURKEY   Group Code: ENTREES  
Source: ALMOND BOARD   Non-Food Recipe: No  
Last modified on: 8/25/2016 2:44:51 PM by [User Name]



[Change](#) [Remove](#)

---

### Portioning

Number of Portions: 60  
Portion Size: 1/2 CUP

### Menu Names

Alternate Menu Name:   
  
2nd Alternate Menu Name:   
  
Exclude Recipe from Calendar Report: No

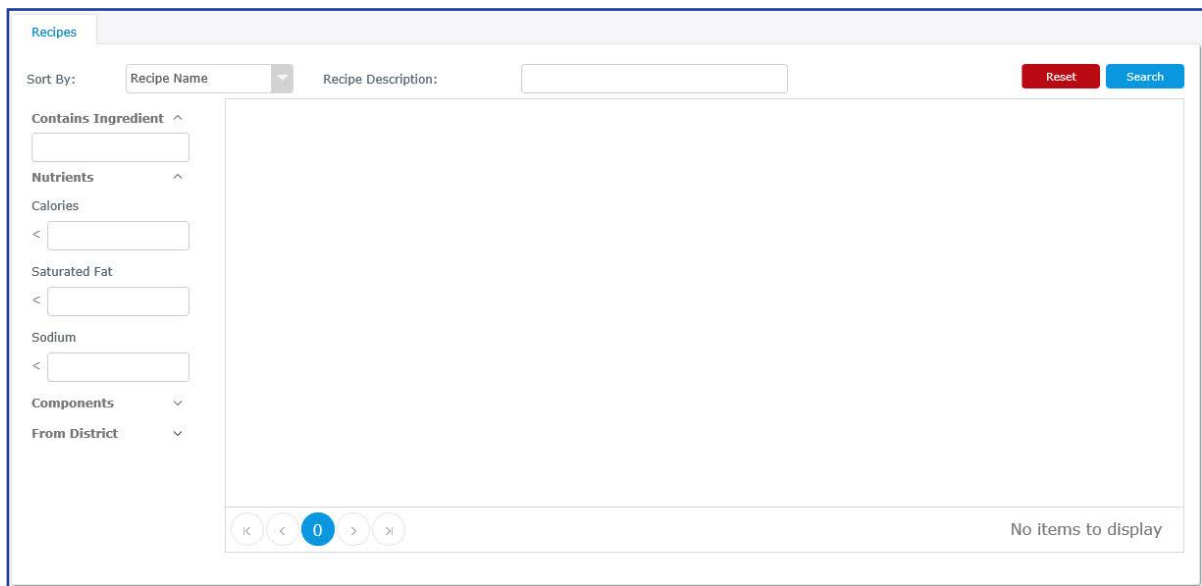
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[Share](#) [Delete](#) [Copy](#) [Deactivate](#) [Cancel](#) [Save](#)

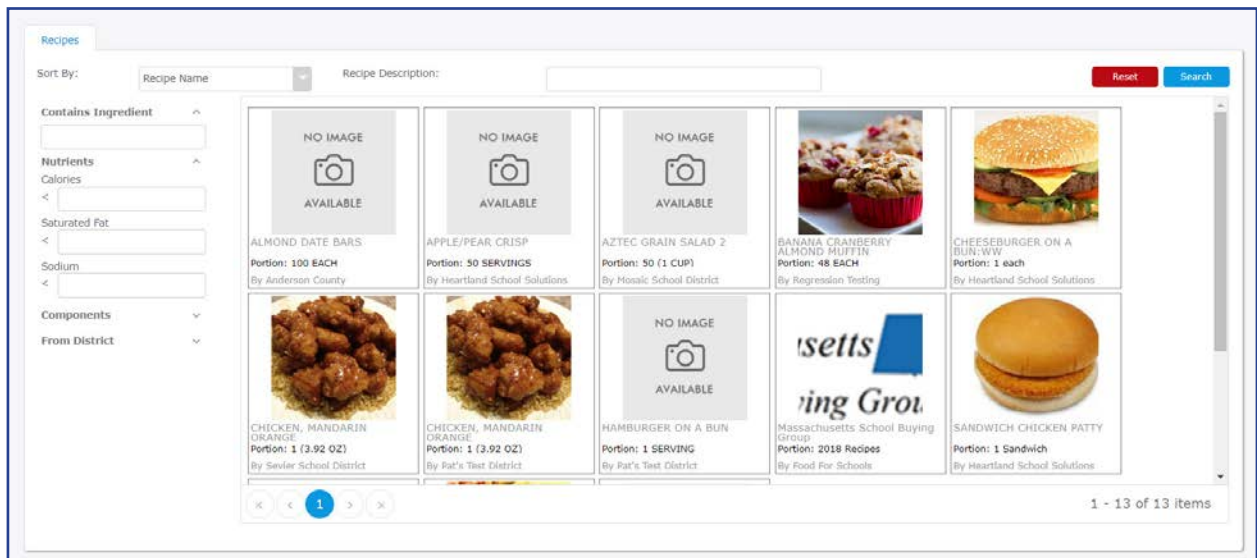
## Importing Recipes

Within the Community section, you can search through and import recipes shared by other Mosaic users at other districts. Importing a recipe will bring it directly into your Mosaic database. This function is useful if you are looking for a recipe that meets certain criteria in that it will allow you to copy recipes without having to enter information for a new recipe.

1. From the left-hand navigation bar, click **Community**.
2. Use the search filters to find a recipe in the database.  
You can search for recipes containing specific ingredients and meal components. You can also filter out items that go over a set limit of nutrients, such as Calories or sodium. You can search from recipes from a specific district as well.
3. After entering filters, click **Search**.



4. Click one of the recipes in the search results to view more detailed information.



- A pop-up will display the information on the selected recipe. This information includes ingredients, nutrients, instructions, meal components, and allergens. To import the recipe, click **Import**.

**Note:** In the Banana Cranberry Almond recipe, the Allergen tab does not appear because allergens were not shared with community. In the Hamburger on a Bun recipe, the Allergens tab is visible because allergens were shared with community.

**Note:** Recipes with sub-recipes listed in their ingredients will have the number of those sub-recipes shown under the recipe's picture.

Import this Recipe Back Import



BANANA CRANBERRY ALMOND MUFFIN  
Portion: 48 EACH  
By Regression Testing

I/R	Item #	CN Code	Description	Measure	Step
I	<a href="#">20081</a>		WHEAT FLR,WHITE,ALL-PURPOSE,ENR,BLEACHED	5.33 CUP	1
I	<a href="#">18371</a>		LEAVENING AGENTS,BAKING PDR,LOW-SODIUM	5 TSP	1
I	<a href="#">2047</a>		SALT,TABLE	.25 TSP	1
I	<a href="#">1001</a>		BUTTER,WITH SALT	1.33 CUP	1
I	<a href="#">19335</a>		SUGARS,GRANULATED	2.667 CUP	1
I	<a href="#">9040</a>		BANANAS,RAW	8 medium (7" to 7-7/8")	1
I	<a href="#">1085</a>		MILK,NONFAT,FLUID,W/ VIT A (FAT FREE OR SKIM)	.667 CUP	1
I	<a href="#">1123</a>		EGG,WHOLE,RAW,FRESH	5 medium	1
I	<a href="#">2050</a>		VANILLA EXTRACT	1 TBSP	1
I	<a href="#">900057</a>		Almond Extract	1 teaspoon	1
I	<a href="#">12063</a>		ALMONDS,DRY RSTD,WO/SALT	1.33 CUP,whole kernels	1
I	<a href="#">900072</a>		CRANBERRIES, WHOLE, SLICED DRIED-COMMODITY	1 qt	1

Import this Recipe Back Import



HAMBURGER ON A BUN  
Portion: 1 SERVING  
By Heartland School Solutions

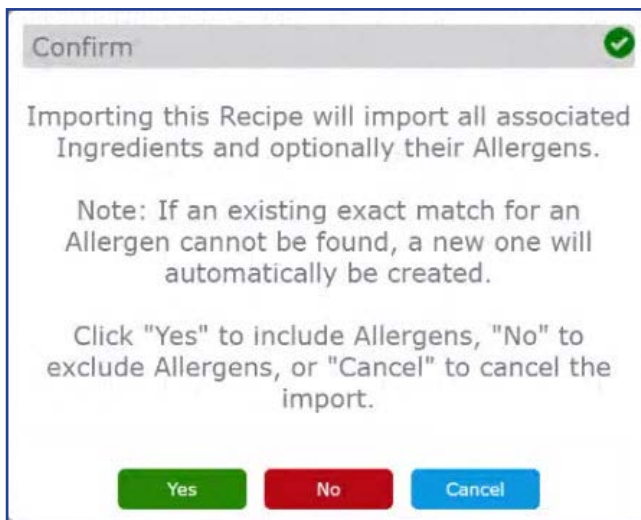
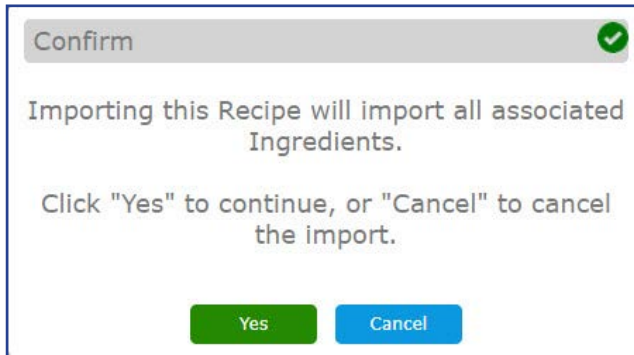
Recipe contains 1 sub-recipes

I/R	Item #	CN Code	Description	Measure	Step
I	<a href="#">23567</a>	23567	BEEF,GROUND,85% LN MEAT / 15% FAT,RAW	1 serving (3 oz)	
I	<a href="#">18350</a>	18350	ROLLS,HAMBURGER OR HOTDOG,PLN	1 roll(s)	
R	<a href="#">161</a>		HAMBURGER ON A BUN	1 SERVING	

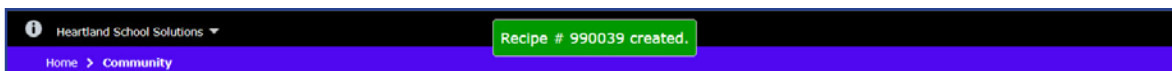
Refer to Heartland Support Central to view our article library at [help.heartlandschoolsolutions.com](http://help.heartlandschoolsolutions.com)

10

- In the confirmation window, select one of the following option:  
Click **Yes** to continue importing the recipe and all associated ingredients and allergens (if shared).  
Click **No** to exclude allergens from the import (if shared).  
Click **Cancel** to exit the import process.



- After importing, a confirmation message will appear at the top of the screen.



# INGREDIENTS

## Ingredients Overview

The Ingredients tab enables you to access the USDA database, add local ingredients, modify ingredients, activate, and deactivate ingredients.



## Maintenance

You can modify measurements, descriptions, classification types, and nutrient data on items you have entered. For USDA items, descriptions can be modified and new measurements can be added, but nutrient data cannot be modified. Perform the following procedure to search for an existing ingredient.

The search result grid conveniently displays the number of ingredients found. When your search grid presents more ingredients than can be displayed on one page, you can use the paging controls to navigate through the results. Additionally, you can adjust the Items per page and maximum items by selecting the desired value from the drop-down menus.

- From the left-hand navigation bar, click **Ingredients**.
- Click **Maintenance**.
- Select your search criteria.
  - Ingredient # or Description:** An ingredient with a specific Ingredient # or a list of items that contain a certain description.
  - CN Code:** An ingredient with a specific CN Code.
  - Manufacturer Product Number:** An ingredient with a specific product number.
  - Classification:** All ingredients with the selected classification.
  - UPC Code:** An ingredient with a specific UPC code.
  - Commodity/Recipe Code:** An ingredient by a specific Commodity/Recipe Code.
  - Source:** All ingredients with a certain source (USDA or Local).
  - Manufacturer:** All ingredients that come from a certain manufacturer.
  - Linked:** All linked or unlinked ingredients depending on select from the drop-down. Leaving the field blank displays all ingredients.
  - Linked Product # or Description:** All linked ingredients with a specific product number or description.
  - Active:** All active or inactive ingredients.
  - Allergens:** All ingredients that contain the selected allergens.
  - Reset:** Resets the search criteria back to the default settings.
- Click **Search** or press **Enter**.

The screenshot shows the 'Ingredient Search' interface. At the top, there are search filters for various criteria: Ingredient # or Description, CN Code, Manufacturer Product #, Classification, UPC Code, Commodity/Recipe Code, Source, Manufacturer, Linked, Linked Product # or Description, Active, and Allergens. Below the filters is a table of search results. The table has columns for Ingredient #, Description, Source, Class, CN Code, UPC Code, P/U UPC Code, S/U UPC Code, Manufacturer, Manufacturer Product #, and Linked Product. The first row is highlighted, and the 'Ingredient #' and 'Linked Product' cells in the second row are circled in red. At the bottom, there are pagination controls showing 'Page 1 of 2', '125 items per page', and '250 items found'.

Ingredient #	Description ^	Source	Class	CN Code	UPC Code	P/U UPC Code	S/U UPC Code	Manufacturer	Manufacturer Product #	Linked Product
<a href="#">990387</a>	100% Mozz Turkey Pepp DoubleStuff Pizza	LOCAL	Com...							
<a href="#">120325</a>	100% Vegetable Juice	USDA	Veget...	120325				CAMPBELL F...	5100000200	
<a href="#">120326</a>	100% Vegetable Juice	USDA	Veget...	120326				CAMPBELL F...	51000138033	
<a href="#">120327</a>	100% Vegetable Juice	USDA	Veget...	120327				CAMPBELL F...	51000138033	
<a href="#">120328</a>	100% Vegetable Juice	USDA	Veget...	120328				CAMPBELL F...	51000003363	<a href="#">9236</a>
<a href="#">120758</a>	100% WG Whole Wheat Bagel, 3.0 oz, 6 pack	USDA	Bread...	120758				Buena Vista F...	72296118080	

- Click the hyperlink in the **Ingredient #** column to open the Ingredient.
- Click the hyperlink in the **Product #** column to open the Product.

# INGREDIENTS

## Adding Ingredients

Perform the following procedure to add an ingredient to your database.

1. From the left-hand navigation bar, click **Ingredients**.
2. Click **Maintenance**.
3. Click **Add**.
4. Enter the information for the ingredient information on the General, Measurement, and Nutrients tabs.

## General Tab

1. An Ingredient Number is automatically generated. To change the number, edit the Ingredient # field. Note that the Ingredient # cannot match the number of an ingredient that already exists.
2. Enter a description in the Description field. Use a descriptive name for the ingredient. The description is used to identify the ingredient when creating a recipe. Recommendations:
  - a. Use your inventory product specification sheet for a description reference.
  - b. Start the description with a generic term, followed by more specific information, and then add the manufacturer and product number. There is a 50 character limit.  
  
For example, "Chicken Patty, BRD CKD McCarty 10651" is a very descriptive name.

3. From the Classification drop-down menu, select a classification. The list contains the established classifications for all ingredients from the USDA Child Nutrition Database. You may also add additional classifications.

**Note:** Additional classifications cannot be added to USDA ingredients.

- a. Click the **plus** sign next to Classification.
- b. Enter a **Code** and **Description** for the new classification.
- c. Click **Save**.

**Note:** The Linked Product feature is used with the Mosaic Ordering and Inventory module, using the Products tab. For more information on this feature, see the Linking to Products section.

Home > Ingredients > Ingredient Search > Edit : 902434 - Chicken Patty BRD CKD McCarty 10651

General Measurement Nutrients Allergens Purchase Info Attachments

Ingredient #: 902434

Description: Chicken Patty BRD CKD McCarty 10651

Source: LOCAL

Classification: Poultry Products

Linked Product: None Selected Search Yield Factor: %

Create Product Quick Recipe Delete Copy Deactivate Cancel Save

# INGREDIENTS

## Linking to Products

This feature is only available to Mosaic Ordering and Inventory users that have permissions (Allow Add, Allow Edit, Allow Delete) to all the Products features.

This feature can link multiple ingredients to a single product so that there is more flexibility in ordering products needed for menus.

1. Click **Search**.



The screenshot shows a form with a text input field labeled "Linked Product:" containing the text "None Selected". To the right of the input field is a blue button labeled "Search". Further right is a label "Yield Factor:" followed by a numeric input field with the value "100" and a percentage sign "%".

2. Enter the appropriate search criteria.

3. Click **Search**.

4. Select the product from the search results.

5. Click **Create Link**.

If they are currently blank, the following fields are populated from the Item Information tab of the ingredient to the linked product:


- Manufacturer
- Manufacturer Product Number
- Brand
- Purchase Unit Description
- Default Price per Purchase Unit - This field contains the linked ingredient's Market Cost per purchase unit
- Stock Units Description
- Stock Units per Purchase Unit

The Linked Product field will populate, and a confirmation prompt displays similar to the following message.

**Note:** Once an ingredient has been linked to a product, you must verify the correct item is at the top of the list on the Purchase Info tab for proper cost analysis.

BEANS, GREEN, COOKED FROM FROZEN, WHOLE, DRA has been linked to 2232 - Canned Beans

6. Enter the appropriate yield factor %. This field automatically defaults to 100%.



The screenshot shows the same form as above, but now the "Linked Product:" field contains "10169 - Green Beans". The "Search" button has been replaced by a blue button labeled "Clear Link". The "Yield Factor:" field still shows "100%". Below the form, there is a small italicized note: "When an ingredient is linked to a product, please be sure to verify the correct item is at the top of the list on the Purchase Info tab for proper cost analysis."

## Clear Link to Product

To remove a product link, click **Clear Link**. A confirmation prompt displays similar to the following message.

BEANS, GREEN, COOKED FROM FROZEN, WHOLE, DRA is no longer linked to 2232 - Canned Beans



# INGREDIENTS

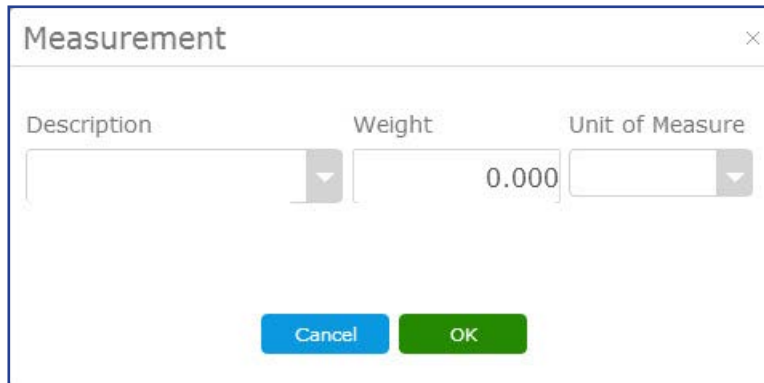
## Measurement Tab

Measurements should reflect all ways the ingredient will be used in recipes, serving lines, production records, and inventory lists, with a weight corresponding to the measure.

The following table provides examples of ingredient use and measurement descriptions.

Ingredient Use	Ingredient	Measurement descriptions
Recipe	Lettuce	CUP SHREDDED, HEAD, LEAF
Serving Line	Chicken Patty	EACH, SERVING
Purchased		CASE 6/#10, CASE 4/1GAL, 8/10# BAGS
Stock Unit		#10 CAN, 1 GAL, 10# BAGS

1. Click **Add**.
2. From the Description drop-down, select a pre-entered measurement or type a measurement description.
3. Enter a weight.
4. From the Unit of Measure drop-down, select a measurement.
5. Click **OK**.



## Expanding Universal Measurements

If you enter in one of the Universal measurements (gram, oz, lb, gal, qt, tbsp, tsp, pint) the program will automatically open up all of the other weight or volume measurements. An example would be if you added in a measurement of CUP. The program would automatically provide you with the measurements for gal, qt, tbsp, tsp, and pint.

You can also add a comma and a descriptor to the measurement and still receive the additional measurements. If you add in a measurement for CUP, shredded you would receive measurements for gal, shredded, qt, shredded, tbsp, shredded, etc.

<a href="#">tbsp_chopped</a>	10.000	gram	LOCAL
<a href="#">pint_chopped</a>	320.000	gram	LOCAL
<a href="#">qt_chopped</a>	640.000	gram	LOCAL
<a href="#">gal_chopped</a>	2560.000	gram	LOCAL

Show Expanded Measurements

# INGREDIENTS

## Nutrients Tab

Use the nutritional information label on the product or the laboratory analysis to enter the nutrient values of your ingredient.

1. Click **Nutrients** tab.
2. Enter the base weight from which nutritional information is based on: this may not always be the “serving size” weight.
3. Select the appropriate measure description from the drop-down menu next to Base Weight.
4. Enter a nutrient value for each of the nutrients listed on the nutrition fact label.
5. If the nutrient value is zero, less than one, or an insignificant amount, type “0”. If the nutrient value is missing from the label then an \*N/A\* must be entered.
6. When finished, click **Save** and **Cancel**.

### Trans Fat

Trans Fat is tracked for informational purposes only.

### Vitamin A, C, Calcium, and Iron

These values can be entered as a percentage or in actual amounts. If the value is a %, then type in a “%” symbol after the number. If the nutrition fact label states there are “insignificant” amounts of the nutrient, enter “0” for the nutrient value.

**Note:** You may use the percent daily values with the old Nutrition Fact labels only.

### Water/Ash

These nutrient values are only available for ingredients that have undergone laboratory analysis. Enter N/A for Water and Ash if you do not have a value for them.

General Measurement **Nutrients** Allergens Purchase Info Attachments

Base Weight:  (0 g)

Trans Fat is tracked for informational purposes only  
i Denotes required nutrient values  
\*N/A\* Denotes Missing Nutrient Values  
Use the percent daily value calculation with the old Nutrition Fact labels only

	Nutrient Value	Nutrient Value/100g		Nutrient Value	Nutrient Value/100g
i Calories:	<input type="text" value="*N/A*"/>	<input type="text" value="*N/A*"/>	Sugars:	<input type="text" value="*N/A*"/> g	<input type="text" value="*N/A*"/> g
Total Fat:	<input type="text" value="*N/A*"/> g	<input type="text" value="*N/A*"/> g	Protein:	<input type="text" value="*N/A*"/> g	<input type="text" value="*N/A*"/> g
i Saturated Fat:	<input type="text" value="*N/A*"/> g	<input type="text" value="*N/A*"/> g	% Vitamin A:	<input type="text" value="*N/A*"/> IU	<input type="text" value="*N/A*"/> IU
Trans Fat:	<input type="text" value="*N/A*"/> g	<input type="text" value="*N/A*"/> g	% Vitamin C:	<input type="text" value="*N/A*"/> mg	<input type="text" value="*N/A*"/> mg
Cholesterol:	<input type="text" value="*N/A*"/> mg	<input type="text" value="*N/A*"/> mg	% Calcium:	<input type="text" value="*N/A*"/> mg	<input type="text" value="*N/A*"/> mg
i Sodium:	<input type="text" value="*N/A*"/> mg	<input type="text" value="*N/A*"/> mg	% Iron:	<input type="text" value="*N/A*"/> mg	<input type="text" value="*N/A*"/> mg
Carbohydrate:	<input type="text" value="*N/A*"/> g	<input type="text" value="*N/A*"/> g	Water:	<input type="text" value="*N/A*"/> g	<input type="text" value="*N/A*"/> g
Dietary Fiber:	<input type="text" value="*N/A*"/> g	<input type="text" value="*N/A*"/> g	Ash:	<input type="text" value="*N/A*"/> g	<input type="text" value="*N/A*"/> g

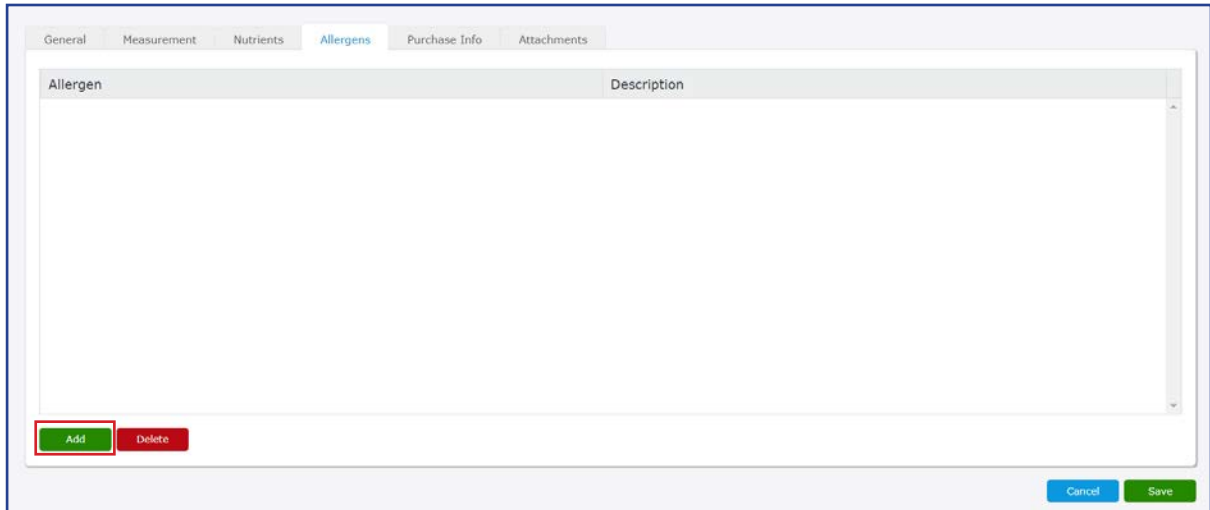
## Allergens Tab

Any allergens that are present in the ingredient are noted on the Allergens tab.

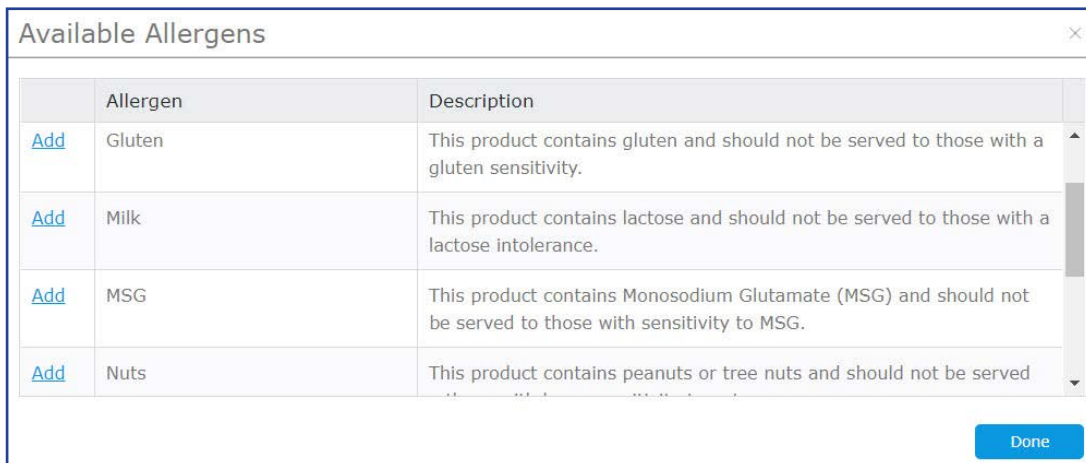
### Adding Allergens

To add an allergen, perform the following procedure.

1. Click **Add**.



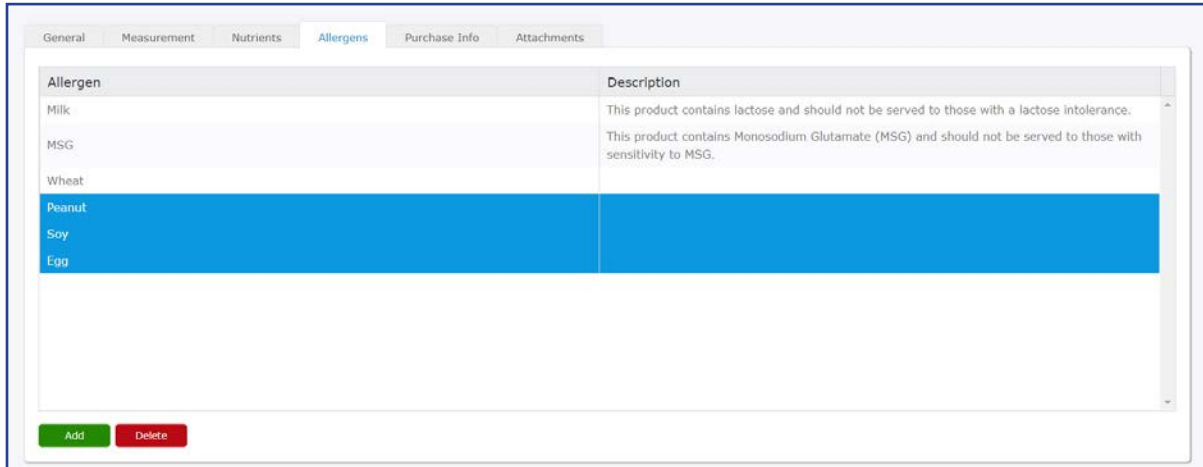
2. On the list of available allergens, click **Add** next to any allergens that are present in the ingredient.
3. When all of the allergens have been noted, click **Done**.



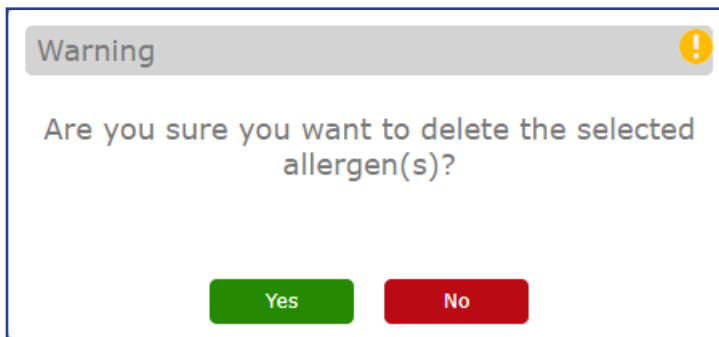
## Deleting Allergens

To remove an allergen, perform the following procedure.

1. If there are any allergens on the Allergen tab's list that are not present in the ingredient, click **Delete** to remove the allergen from the list. To select multiple allergens, hold the Control (Ctrl) key and click on selected allergens.



2. In the confirmation window, click **Yes** to delete the selected Allergen(s).



## Purchase Info Tab

Use the Purchase Info tab to add in Manufacturer information, Product code information, Purchase Unit information, and Source of Nutrient Data when adding new ingredients, as this is required by the USDA.

Purchase information will be pre-filled if an ingredient was created from a product. You may drag and drop products in the order of priority to be used in recipes and menus.

### Adding Purchase Information for a New Ingredient

1. Click the **Purchase Info** tab.
2. Select the product's manufacturer from the **Manufacturer** drop-down list.
3. Enter the **Manufacturer Product #**.
4. Enter the cost per purchase unit and a description of the purchase unit.
5. Enter the number of units of stock per purchase unit.
6. Select the product's vendor from the **Vendor** drop-down list.
7. Enter the product # used by the vendor.

**Note:** Vendor information is maintained on the Setup tab.

8. Select if the product is available as a commodity purchase. If it is, enter the commodity value per purchase unit. If not, leave the Commodity Fair Market Value field blank.
9. Enter the source of your nutrient data.
10. If applicable, enter the UPC code.

The screenshot shows the 'Purchase Info' tab in a software interface. The tab is active and displays the following fields:

General	Measurement	Nutrients	Allergens	Purchase Info	Attachments
Manufacturer:	McCarthy			Vendor:	McCarthy
Manufacturer Product #:	10651			Vendor Product #:	1112
Brand:	McCarthy			Available as Commodity:	No
Market Cost Per Purchase Unit:	27.45			Commodity Fair Market Value:	
Purchase Unit Description:	Case (50ct)			Source of Nutrient Data:	McCarthy
Stock Units Per Purchase Unit:	50	Patty (3oz)		UPC Code:	182032

## Editing Purchase Information for an Ingredient Created from a Product

1. Click the **Purchase Info** tab.

Product #	Manufacturer	Mfr. Product #	Brand	Purchase Unit	Cost	Commodi...	Active
10169-001	Del Monte Quality	39005	Del Monte	6 Can #10 per Case 6/#10 can	3.50	No	Yes
10169-002	NESTLE /CARNATN/CHEFMATE/LIBBY	49005	Libby's	6 Can #10 per Case 6/#10 can	3.29	No	Yes

The item listed first in the grid is the item that menu planning will use for usage by menu plan, order by menu plan, and all recipe & menu cost analysis.

Quick Recipe Delete Copy Deactivate Cancel Save

2. Select each Product from the list and drag and drop it to the preferred order of use.

Product #	Manufacturer	Mfr. Product #	Brand	Purchase Unit	Cost	Commodi...	Active
10169-002	NESTLE /CARNATN/CHEFMATE/LIBBY	49005	Libby's	6 Can #10 per Case 6/#10 can	3.29	No	Yes
10169-001	Del Monte Quality	39005	Del Monte	6 Can #10 per Case 6/#10 can	3.50	No	Yes

The item listed first in the grid is the item that menu planning will use for usage by menu plan, order by menu plan, and all recipe & menu cost analysis.

Quick Recipe Delete Copy Deactivate Cancel Save

## Attachments Tab

Use the Attachments tab to import files, images or text documents which back up the details entered for the nutrients in the ingredient, such as an image of a Nutrition Facts label.

1. Click the **Attachments** tab.
2. Click the **Add** button.
3. Enter a description for the attachment.
4. Click **Browse** and select the file you would like to attach. The compatible file types are .gif, .jpg, .png, .xls, .doc, and .txt.

**Note:** The attachment file's name cannot include commas.

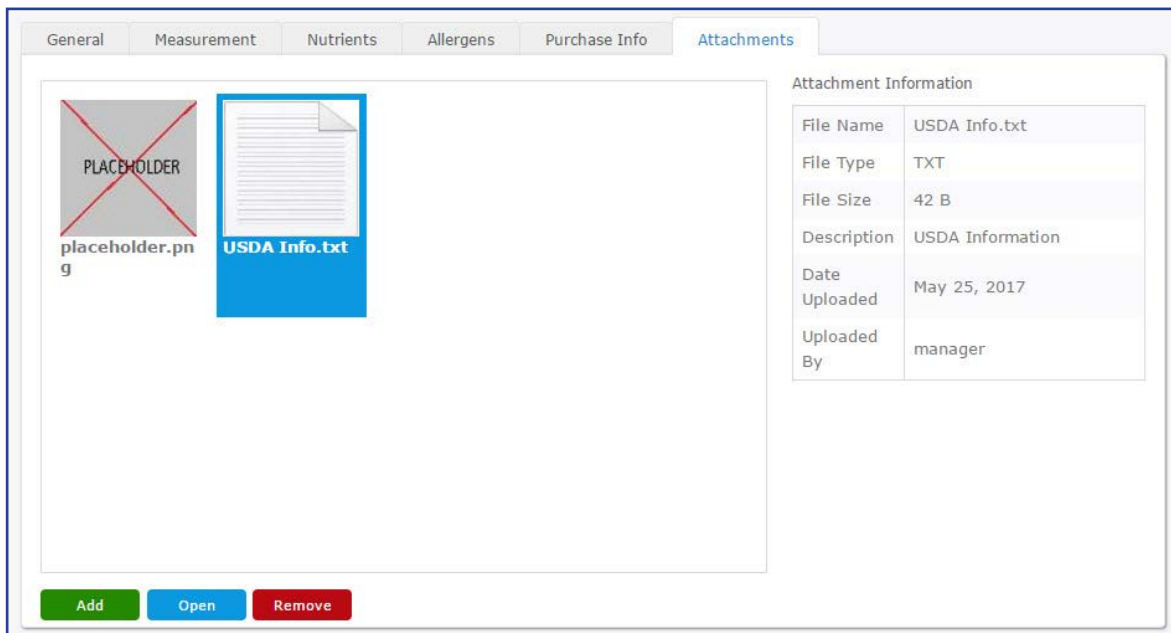
5. After selecting the file, click **Attach**.



The 'Add Attachment' dialog box contains the following fields and buttons:

- Description: USDA Information
- File Selected: USDA Info.txt
- Buttons: Browse, Cancel, Attach

6. Attachments appear in a window. Selecting an attachment will show detailed information about the attached file, such as date uploaded and the user who uploaded the file.
7. To open a copy of an attachment, click the attached file and click the **Open** button.
8. To delete an attachment from the ingredient, click the attached file and click the **Remove** button.
9. When finished, click **Save**.



The Attachments tab displays the following information:

Attachment Information	
File Name	USDA Info.txt
File Type	TXT
File Size	42 B
Description	USDA Information
Date Uploaded	May 25, 2017
Uploaded By	manager

Buttons: Add, Open, Remove

# INGREDIENTS

## USDA Tab

The **USDA** tab displays detailed information for ingredients from the USDA database. You cannot edit the information about the product from this tab.

USDA Descriptions			
Long Description:	Milk, non-instant nonfat dry, reconstituted		
Abbreviated Description:	RECONSTITUTING NONFAT DRY MILK		

Additional Information			
CN Code:	50000	Commodity/Recipe Code:	A-14
Source:	USDA Standardized Recipe	USDA Status:	Active
Added:	1/30/1994 6:00:00 PM	Modified:	3/27/2011 7:00:00 PM



# INGREDIENTS

## Additional Ingredient Maintenance Options

Additional options are available to assist with maintaining ingredients in your database.

**Note:** Depending on the ingredient and permissions, you may not be able to perform all tasks.

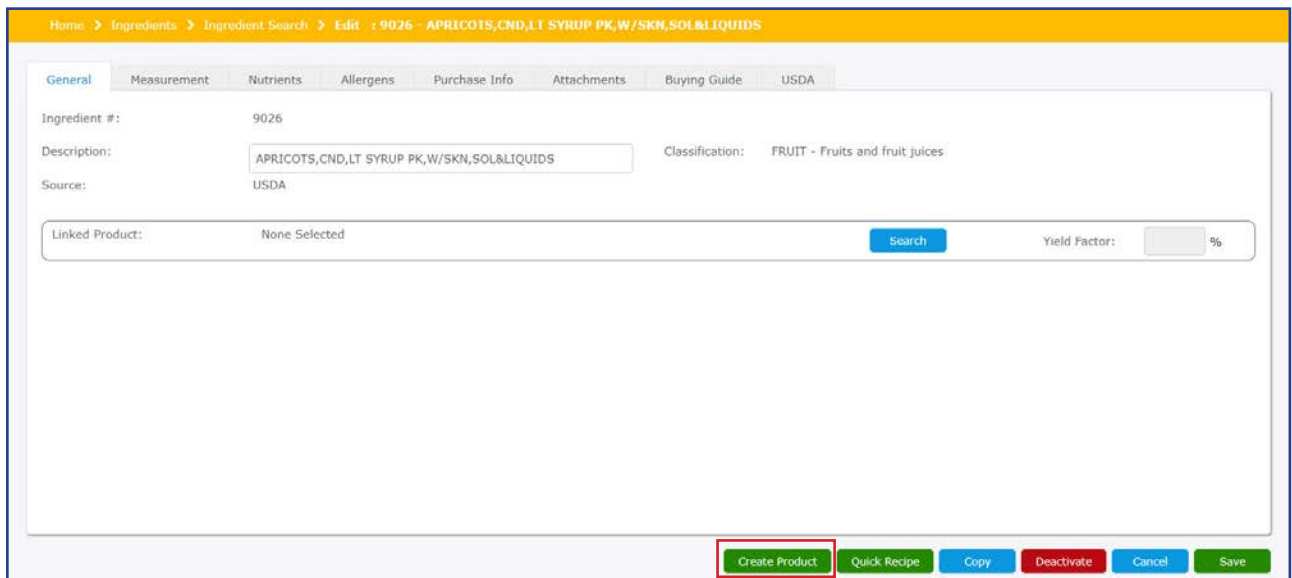


### Create Product

Allows you to create a product directly from an ingredient without having to navigate through the system. During the creation process, the following fields are copied over where they exist: Manufacturer, Manufactured Product Number, Brand, Purchase Unit Description, Commodity status, Commodity Fair Market Value, UPC Code, and Stock Units per Purchase Unit.

**Note:** Once created, the new product will be linked to the ingredient automatically.

1. From the left-hand navigation bar, click **Ingredients**.
2. Click **Maintenance**.
3. Enter the Ingredient # or description into the Search field and click **Search**.
4. Click the **Ingredient #** hyperlink in the left column or double click the Description.
5. Click **Create Product** at the bottom of the screen.



# INGREDIENTS

- The Product Maintenance screen will open to the Item Information tab. Review the prefilled information for accuracy and complete any additional fields. The following fields are required in order to save the product: Purchase Unit Description, Purchase Unit Weight, Stock Unit Description, Default Purchase Unit Price, Stock Units per Purchase Unit.  
**Note:** If all required fields are not completed upon attempting to save, you will be notified to correct each field.

The screenshot shows the 'Item Information' tab of the Product Maintenance screen. The breadcrumb trail is 'Home > Products > Maintenance'. The tabs are 'General', 'Item Information', 'Notes', 'Attachments', and 'Fulfillment'. The 'Item Information' tab is active, showing the following fields:

- Item Number: 001
- Manufacturer: Libby's- (ABC Co.)
- Manufacturer Product Number: 1234567
- Brand: Libby's
- Purchase Unit Description: Case 6/#10
- Purchase Unit Weight: 64 Ounces
- Stock Unit Description: #10 CAN
- Status: Available
- Commodity: No
- Commodity Fair Market Value: (empty)
- Default Purchase Unit Price: 25.00
- UPC Code: (empty)
- Stock Units per Purchase Unit: 6

Below the fields is a 'Price Lists' section with a 'Status Filter' dropdown. A table with the following columns is shown:

List #	Description	Vendor	Vendor Product #	Start Date	End Date	Commodity Processing Fee	Purchase Unit Price	Status
--------	-------------	--------	------------------	------------	----------	--------------------------	---------------------	--------

At the bottom right, there are 'Cancel' and 'Save' buttons.

- Click on the **General** tab.
- Use the drop-down menu to establish a **Product Category**.
- Complete any additional information in the Notes, Attachments, and Fulfillment tabs.
- Once you have completed all necessary actions, click **Save**.

The screenshot shows the 'General' tab of the Product Maintenance screen. The breadcrumb trail is 'Home > Products > Maintenance'. The tabs are 'General', 'Item Information', 'Notes', 'Attachments', and 'Fulfillment'. The 'General' tab is active, showing the following fields:

- Product Number: 123456790
- Description: APRICOTS,CND,LT SYRUP PK,W/SKN,SOL&LIQUIDS
- Shelf Life (Days): (empty)
- Product Category: Fruit, Canned
- Usage Category: (empty)
- Storage Category: (empty)
- Exclude from Orders: No
- Exclude from Rounding: No
- Bid Priority: Medium
- Site Groups: All Sites x

A red error message is displayed above the 'Product Category' field: 'The Product Category field is required.' At the bottom right, there are 'Cancel' and 'Save' buttons.

# INGREDIENTS

11. A confirmation window will appear notifying you the new Product has been saved.

The screenshot shows the 'Ingredient Search' form in a web application. At the top, a green notification box says 'Product saved successfully'. The form contains several input fields: 'Ingredient # or Description', 'Commodity/Recipe Code', 'CN Code', 'Source', 'Product Number', 'Manufacturer', 'Classification', 'Active', and 'UPC Code'. There are 'Reset', 'Add', and 'Search' buttons at the bottom right. Below the form is a table with columns: 'Ingredient #', 'Description ^', 'Source', 'Class', 'CN Code', 'Manufacturer', 'Product #', 'Comm/Rec. Code', 'Commodity', and 'Acti'. The table is currently empty. At the bottom, there is a pagination control showing 'Page 0 of 0', '125 items per page', and 'No items to display maximum items: 250'.

12. You may now locate the product in the Product: Maintenance screen.

The screenshot shows the 'Product Maintenance' screen. It features a form with fields for 'Product # or Description', 'Active', 'Product Category', 'Needs Attention', 'Usage Category', 'UPC Code', and 'Storage Category'. There are 'Reset', 'Add', and 'Search' buttons. Below the form, a table displays '6 Items Found'. The table has columns: 'Product #', 'Description', 'Brand', 'Product Category', 'Usage Category', 'Storage Category', 'Qty per Purchase Unit', 'Active', and 'Needs Attenti...'. The first row is highlighted in blue.

Product #	Description	Brand	Product Category	Usage Category	Storage Category	Qty per Purchase Unit	Active	Needs Attenti...
123456790-001	APRICOTS,CND,LT SYRUP PK,W/SKN,SOL...	Libby's	Fruit, Canned			6 #10 CAN per ...	Yes	No
27001-001	NAPKINS	RKO	Paper Goods	Supplies	Stockroom	10 Pkg (300ct) ...	Yes	No
50356-001	APPLES, SLICED, CND, WATER PACKED	Del Monte	Fruits, Vegetabl...	Purchased Food	Stockroom	6 #10 Can per C...	Yes	No
9003-001	APPLES,FRESH	ABC	Fruits, Vegetabl...	Purchased Food	Stockroom	113 Each per Ca...	Yes	No
9020-001	APPLESAUCE,CND,SWTND,WO/SALT	Libby's	Fruits, Vegetabl...	Purchased Food	Stockroom	6 #10 Can per C...	Yes	No
902432-001	BEANS,SNAP,GREEN,CND	Harvest	Beans, Canned	Purchased Food	Stockroom	6 #10 Can per C...	Yes	No

## Quick Recipe

The Quick Recipe button allows you to create a recipe from an existing ingredient. This is useful for ingredients that can be served on their own.

1. From the left-hand navigation bar, click **Ingredients**.
2. Click **Maintenance**.
3. Enter the ingredient number or description into the Search field and click **Search**.
4. Click the **Ingredient#** hyperlink in the left column or double click the Description.
5. Click **Quick Recipe**.
6. The ingredient will be saved and a new recipe will be created based on the ingredient. The new recipe's description will match the ingredient's description. In addition, the ingredient will be added to the new recipe. All other recipe information will need to be entered from here, including batch quantities and preparation instructions. For information, see the **Recipes** section of this user guide.

The screenshot shows a web-based form for creating a recipe. At the top, there are tabs for 'General', 'Ingredients', 'Nutrients', 'Batch Quantities', 'Instruction', 'Components', 'Allergens', 'Notes', 'Attachments', and 'Misc'. The 'General' tab is active. The form is divided into several sections: 'General' with fields for 'Recipe #' (990064), 'Description' (APPLES, FRESH, GRANNY SMITH, WITH SKIN), 'Source', 'HACCP Process', 'Group Code', and 'Non-Food Recipe' (No); an image upload area with 'NO IMAGE' and 'AVAILABLE' text and 'Add'/'Remove' buttons; 'Portioning' with 'Number of Portions' and 'Portion Size' fields; 'Menu Names' with 'Alternate Menu Name', '2nd Alternate Menu Name', and 'Exclude Recipe from Calendar Report' (No) fields; and 'Cancel'/'Save' buttons at the bottom.

## Deleting Ingredients

You may delete an ingredient as long as it is a locally added ingredient, that is not in use on a recipe (USDA ingredients cannot be deleted). This may be necessary when an ingredient is no longer available by a manufacturer or the ingredient was added erroneously. Perform the following procedure to delete an ingredient.

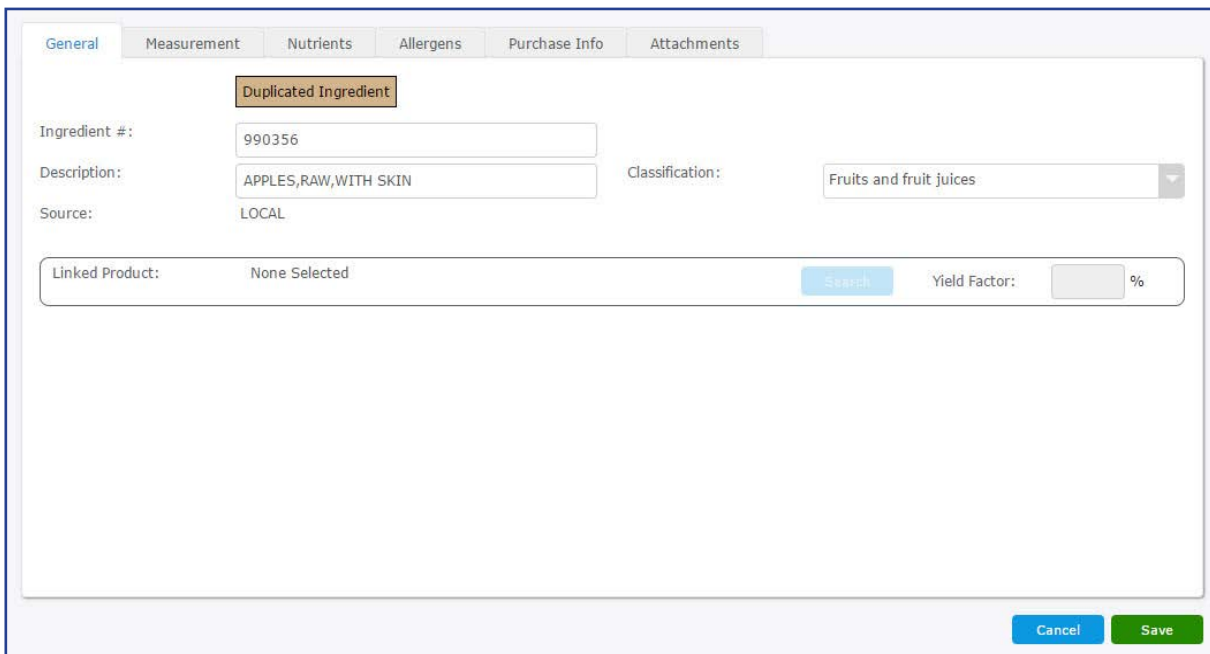
1. From the left-hand navigation bar, click **Ingredients**.
2. Click **Maintenance**.
3. Enter the ingredient number or description into the Search field and click **Search**.
4. Click the **Ingredient#** hyperlink in the left column or double click the Ingredient Description in the list.
5. Click **Delete**.
6. The following warning message displays. Click **Yes** to confirm the deletion.



## Copying Ingredients

You can create a copy of an Ingredient to help reduce data entry time.

1. Click **Ingredients**.
2. Click **Maintenance**.
3. Enter the ingredient number or description into the **Search** field, and click **Search**.
4. Click the **Ingredient#** hyperlink in the left column or double click the Description.
5. Click **Copy**.
6. An exact copy of the ingredient will be created with a new ingredient number.
7. Apply the desired changes, and then click **Save** and **Cancel**.



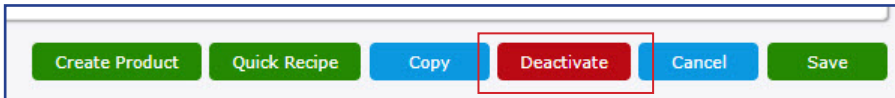
The screenshot shows a web application form for editing an ingredient. The form has several tabs: "General", "Measurement", "Nutrients", "Allergens", "Purchase Info", and "Attachments". The "General" tab is active. A yellow box highlights the text "Duplicated Ingredient" above the "Ingredient #" field. The "Ingredient #" field contains the value "990356". The "Description:" field contains "APPLES,RAW,WITH SKIN". The "Classification:" dropdown menu is set to "Fruits and fruit juices". The "Source:" field contains "LOCAL". Below these fields, there is a "Linked Product:" field with "None Selected" and a "Search" button. To the right of this is a "Yield Factor:" field with a percentage sign. At the bottom right of the form, there are "Cancel" and "Save" buttons.

# INGREDIENTS

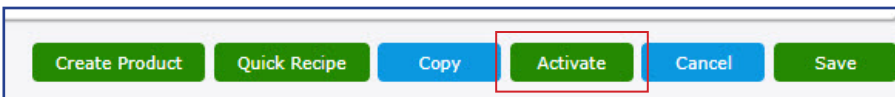
## Activating and Deactivating Ingredients

To hide items that you no longer want to see in your database, perform the following procedure to deactivate the item.

1. From the left-hand navigation bar, click **Ingredients**.
2. Click **Maintenance**.
3. Enter the ingredient number or description into the **Search** field and click Search.
4. Click the **Ingredient#** hyperlink in the left column or double click the Ingredient Description in the list.
5. With the Ingredient Maintenance screen open you should have a **Deactivate** button at the bottom of the screen, click **Deactivate**.



6. To reactivate the Ingredient, open it up and click **Activate**.



# INGREDIENTS

## Classifications

Classifications allow you to arrange your ingredients into smaller organized groups. You can create additional classification if desired.

Perform the following procedure to create a new classification.

1. From the left-hand navigation bar, click **Ingredients**.
2. Click **Classifications**.
3. Select your search criteria.  
**Code:** The code created for Ingredient Classification.  
**Description:** The Description of the Ingredient Classification.
4. Click **Search** or press **Enter**.

The screenshot shows a web interface for searching ingredient classifications. At the top, there is a breadcrumb trail: Home > Ingredients > Classifications. Below this is a 'Classification Search' section with two input fields: 'Code:' and 'Description:'. To the right of these fields are three buttons: 'Reset' (red), 'Add' (green), and 'Search' (blue). Below the search section is a table titled '42 Items Found' with a 'Items per Page' dropdown set to '20'. The table has three columns: 'Code', 'Description ^', and 'Source'. The first few rows are as follows:

Code	Description ^	Source
<a href="#">BABY</a>	Babyfood	USDA
<a href="#">BEEF</a>	Beef	USDA
<a href="#">DRINK</a>	Beverages	USDA
<a href="#">BAKE</a>	Bread and cereal recipes	USDA
<a href="#">CEB</a>	Breakfast Cereals	USDA
<a href="#">BRKRC</a>	Breakfast recipes	Local
<a href="#">COMM</a>	Community	Local
<a href="#">COND</a>	Condiments: catsup, mustard, relish	USDA

At the bottom of the table, there are pagination controls: '<<' '<' '1' '2' '3' '>' '>>'. The '1' is highlighted, indicating the current page.

5. Click the hyperlink in the **Code** column to open the product.

## Search Results Navigation

The search result grid conveniently displays the number of recipe groups found. When your search grid presents more recipe groups than can be displayed on one page, you can use the paging controls to navigate through the results. Additionally, you can adjust the Items per page by selecting the desired value from the drop-down menus.

# INGREDIENTS

## Add

Perform the following procedure to create a new classification.

1. Click **Ingredients**.
2. Click **Classifications**.
3. Click **Add**.
4. Enter in a Class.
5. Enter in a Description.
6. Click **Save**.



New Classification

Class:

Description:

Cancel Save

## Deactivate (Bulk)

In addition to deactivating ingredients from their pages one at a time, you can deactivate multiple ingredients at once on the **Ingredients** tab using the **Deactivate (Bulk)** option. Deactivate (Bulk) allows you to deactivate ingredients that have not been used on an active recipe. This allows you to keep your database free of data that is no longer in use and removes clutter when looking up ingredients.

Perform the following steps to deactivate multiple ingredients at once.

1. From the left-hand navigation bar, click **Ingredients**.
2. Click **Deactivate (Bulk)**.
3. Mosaic will automatically detect ingredients not being used in active recipes and. Click **Yes** to begin deactivating ingredients.



Warning

This option will deactivate all ingredients not currently being used on active recipes.

Do you wish to continue?

Yes No

4. After some time, a message will appear stating how many ingredients have been deactivated. Click **OK**.



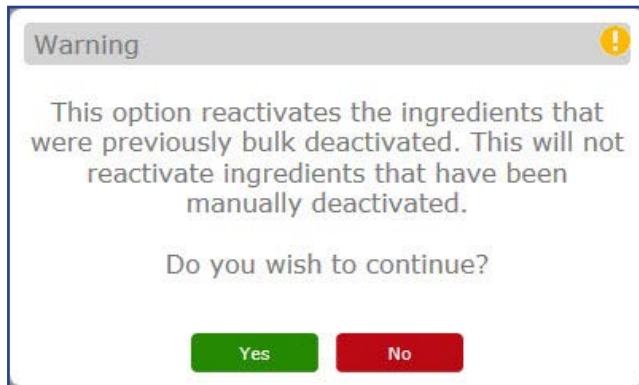
# INGREDIENTS

## Reactivate (Bulk)

From the Ingredients tab, you can reactivate multiple ingredients simultaneously using the Reactivate (Bulk) option. Reactivate (Bulk) is specifically designed to reactivate ingredients deactivated using the Deactivate (Bulk) option. It does not allow for reactivation of ingredients that were deactivated manually.

Perform the following steps to reactivate ingredients deactivated in bulk.

1. From the left-hand navigation bar, click **Ingredients**.
2. Click **Reactivate (Bulk)**.
3. Click **Yes** to begin reactivating ingredients.



4. A message will appear stating how many ingredients have been reactivated. Click **OK**.

# INGREDIENTS

## Quick Cost Update

In addition to updating the cost of each ingredient individually, you can use the Quick Cost Update feature to update the cost of multiple items at once. To quickly edit cost information on multiple ingredients, on the **Ingredients** tab, click **Quick Cost Update**.

The page opens to an ingredient search page where an unfiltered list of ingredients is automatically generated. Use the fields above the list to search by ingredient number, description, purchase unit, distributor, and classification by entering criteria and clicking **Search**. You can also narrow ingredients by whether they are active and available as a commodity.

**Note:** Ingredients that have been linked to a Product are not included in the Quick Cost Update. In order to update the cost of a linked Ingredient, you must do so at **Product > Maintenance > Default Purchase Unit Price**.

To update the cost of a product on the list, simply click the amount shown in the Market Cost per P/U column and enter the updated cost amount. Click away from the column or press **Enter** to save the edit. Once the cost has been saved, a “Saved” message appears above the updated cost.

Ing #	Ingredient Description ^	Market	Purchase...	Manufact...	Distributor	Class	Active
12061	ALMONDS	40.00	Case 4 Bags	ABC Co		NUTS	Yes
900037	APPLES,CND,H2O PK,SLCD,DRN	29.25 x	Case 6/#10	Libby's		FRUIT	Yes
901667	APPLES,CND,WATER PACK,SLCD	15.45	Case			LC-FR	Yes
9003	APPLES,RAW,WITH SKIN	16.75	case 10#			FRUIT	Yes
9026	APRICOTS,CND,LT SYRUP PK,W/SKN,SOL&LIQUIDS	25.00	Case 6/#10	Libby's- (A...		FRUIT	Yes
601476	BEEF FLAMEBROIL PATTY # 155-525 ADVANCE FOOD	31.25	Case (135...	NE PROCE...		BEEF	Yes
23567	BEEF,GROUND,85% LN MEAT / 15% FAT,RAW	95.00	Case (4 C...	ABC Comp...		BEEF	Yes
50483	CARROTS, CANNED, SLICED OR CUT, DRAINED, WITH	21.30	Case 6/#1...	ABC Manu...		MISC	Yes
11124	CARROTS,RAW	10.50	Case 25#			PROD	Yes
11143	CELERY,RAW	1.25	Case 24St...			PROD	Yes
8014	CEREALS RTE, COCOA KRISPIES, KELLOGG'S	13.00	Case 96ct	Kellogg		CER	Yes
902434	Chicken Pattv BRD CKD McCartv 10651	27.45	Case (50ct)	McCartv		PI TRY	Yes

# RECIPES

## Recipes Overview

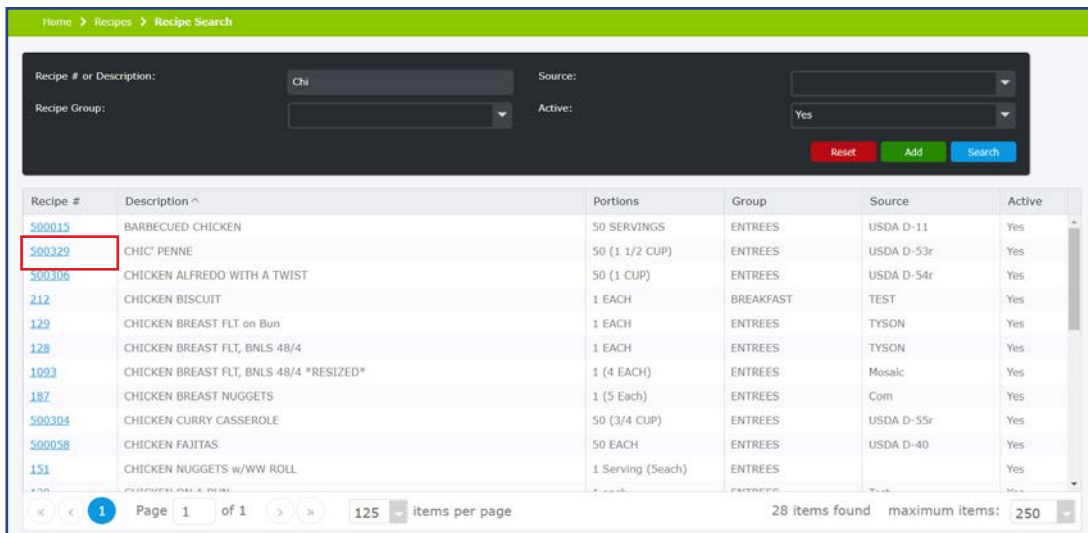
The Recipes tab is used to create recipes for menus. In this section, you will learn how to search for recipes, add your own local recipes, duplicate recipes, activate and deactivate recipes, and scale a recipe.



## Maintenance

You can modify recipes, descriptions, ingredients within a recipe, description details and information, portions within a recipe, menu names, sub-recipes, batch quantities, instructions, and moisture and fat changes within a recipe you have entered. Perform the following procedure to review or modify an existing recipe.

1. From the left hand navigation bar, click **Recipes**.
2. Click **Maintenance**.
3. Select your search criteria.  
**Recipe # or Description:** Search for a recipe with a specific Recipe # or a list of items that contain a certain description.  
**Recipe Group:** Search for all recipes within the selected group.  
**Source:** Search for all recipes with a certain source.  
**Active:** Search for all active or inactive ingredients.
4. Click **Search** or press **Enter**.  
The search result grid conveniently displays the number of recipes found. When your search grid presents more recipes than can displayed on one page, you can use the paging controls to navigate through the results. Additionally, you can adjust the Items per page and maximum items by selecting the desired value from the drop-down menus.
5. Click the hyperlink in the **Recipe #** column to open the recipe.



# RECIPES

## Adding Recipes

Remember, even if the item is a single item with only one ingredient, you will still need to add it as a recipe before it can be placed on the menu.

1. From the left-hand navigation bar, click **Recipes**.
2. Click **Maintenance**.
3. Click **Add**. The next available recipe number is automatically assigned, and this number cannot be changed.

Home > Recipes > Maintenance

Recipe # or Description:  Source:

Recipe Group:  Active:

Recipe #	Description	Portions	Group	Source

## General Tab

Complete the applicable fields on the **General** tab. **\*\***Indicates a required field.

1. **Recipe #\*\***: This field is filled automatically. You may change the autofilled number in this field, but it must be 6 digits or less and it cannot duplicate an existing recipe's Recipe #.
2. **Description\*\***: Enter the name or description of the recipe.  
**Note**: The description field content is used when performing a search; therefore, is important to use consistent naming conventions.
3. **Source**: Indicate where the recipe originated, such as a magazine or another school district.
4. **Group Code\*\***: Select the appropriate code for this recipe.
5. **HACCP Process**: Select the appropriate process for this recipe.
6. **Non-Food Recipe**: This is defaulted to No. Change to Yes when applicable.
7. **Service Type**: Indicate whether the recipe needs to be served Hot or Cold.  
**Note**: *Service Type must be defined if you are uploading to SmartSense.*
8. **Threshold**: This field is only enabled if a Service Type is selected. If the recipe needs to be Hot or Cold, enter the ideal temperature (in ° F) the item should be when served.
9. **Number of Portions\*\***: Enter the number of portions this recipe serves. Many recipes from brand name products will be created for one portion, while scratch recipes will be for multiple portions.
10. **Portion Size\*\***: Enter a portion size in the Portion Size field. For example, Each, 1/2 cup, Cup.
11. **Alternate Menu Name**: Enter the alternate menu name you would like to associate with this recipe.
12. **2nd Alternate Menu Name**: Enter in a second additional menu name, if applicable.
13. **Exclude Recipe from Calendar Report**: This option suppresses the recipe on the Menu Calendar Report while still including a recipe in nutrient analysis.

The screenshot shows a web-based form for editing a recipe. At the top, there are tabs for 'General', 'Ingredients', 'Nutrients', 'Batch Quantities', 'Instruction', 'Components', 'Allergens', 'Notes', 'Attachments', and 'Misc'. The 'General' tab is active. The form is divided into several sections:

- General**: Contains fields for 'Recipe #' (990042), 'Description', 'Source', 'Group Code', 'HACCP Process', 'Non-Food Recipe' (No), 'Service Type', and 'Threshold'. To the right is an image upload area with a camera icon and the text 'NO IMAGE' and 'AVAILABLE'. Below it are 'Add' and 'Remove' buttons.
- Portioning**: Contains fields for 'Number of Portions' and 'Portion Size'.
- Menu Names**: Contains fields for 'Alternate Menu Name', '2nd Alternate Menu Name', and 'Exclude Recipe from Calendar Report' (No).

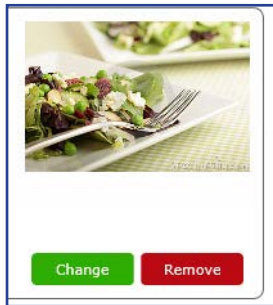
At the bottom right of the form are 'Cancel' and 'Save' buttons.

# RECIPES

In addition to information in the fields, you may also add a photo to a recipe. To add a photo, under the photo window, click **Add**.



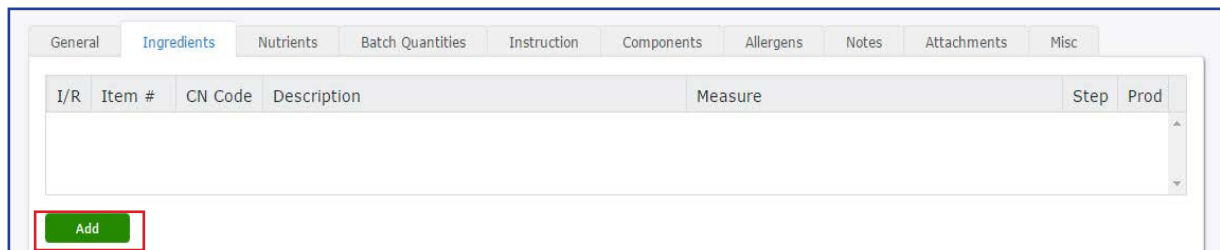
Select the image from the folder where it is stored and click **Open**. The image will display on the General tab.



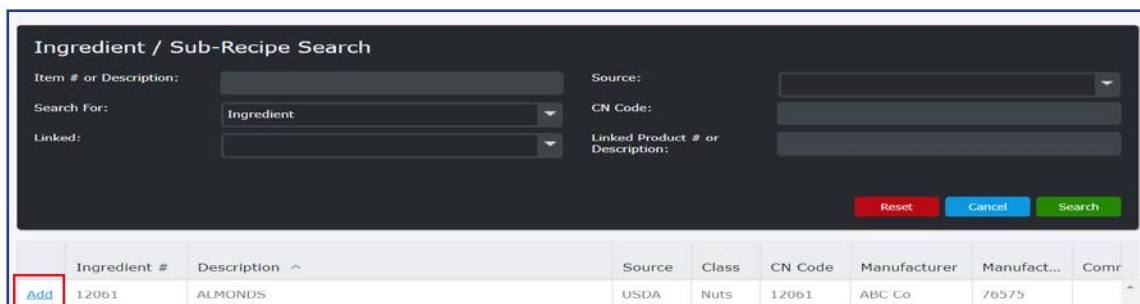
## Ingredients Tab

The **Ingredients** tab is used to add ingredients and sub-recipes to your recipe. Ingredients are individual food items. While items such as salt are commonly thought of as ingredients, products that are prepared when purchased, such as canned soup, corn dogs, and chicken nuggets, are also ingredients. A sub-recipe is a recipe used within another recipe. For example, a recipe for tomato sauce can be used as a sub-recipe for spaghetti or lasagna.

1. Click **Add**.



2. Enter the first few characters of the ingredient or sub-recipe name in the **Item # or Description** field.
3. Confirm the appropriate criteria (Ingredient or Recipe) is selected in **Search For** drop-down.
4. Click **Search**.
5. Any recipe description or recipe # that contains the entered text displays in the results grid.
6. Click **Add** to include the desired ingredient/sub-recipe with the recipe.



# RECIPES

7. At the ingredient prompt, complete the applicable fields.
  - a. Enter the **Quantity** and **Measurement** for the item.  
**Note:** If the ingredient or sub-recipe requires an additional measurement, enter a quantity and select the measurement from the drop-down menu.
  - b. In **Measure 1**, enter a Production Specification for the ingredient.
  - c. If there is more than one Production Specification, enter the second one in **Measure 2**.  
**Note:** Entering in your Production Specifications allows you to pick the measurement that appears for this ingredient when it is printed on a production record.
  - d. Use the **Round** drop-down menu to choose whether a measurement will round up to the next full unit or if the item will show up on Production Records.  
**Yes:** This option will make the measurement round up to the next full unit.  
**No:** This option will make it so the measurement does not round up to the next full unit.  
**Skip:** This option will make the item not show on Production Records. This can be used for spices and condiments that are added to taste.  
**Blank:** This option will have the item show on Production Records but will omit the measurement. This can be used for items where you do not need to specify quantities.
  - e. Click **OK**.

8. Continue adding ingredients and sub-recipes for all the necessary components.

The Ingredients list can be re-ordered by dragging and dropping the item to the desired location. Click the row (make sure it is highlighted), and then click and hold the mouse button to drag the item to a new spot on the list.

I/R	Item #	CN Code	Description	Measure	Step	Prod
I	20081	20081	WHEAT FLR, WHITE, ALL-PURPOSE, ENR, BLEACHED	2 LB + 4 oz	1	qt
I	902236		SHORTENING, VEG, TYPE I-COMMOD	1 LB + 4 oz	1	
I	2047	2047	SALT, TABLE	2 tsp	1	
I	14429	14429	WATER MUNICIPAL	1.333 CUP	2	

You may also edit an ingredient listed on this tab by clicking the **new tab** symbol next to a listed ingredient. This opens the ingredient information in a new tab so that you do not have to interrupt adding or editing a recipe.

I/R	Item #	CN Code	Description	Measure	Step
I	20081	20081	WHEAT FLR, WHITE, ALL-PURPOSE, ENR, BLEACHED	2 LB + 4 oz	1
I	902236		SHORTENING, VEG, TYPE I-COMMOD	1 LB + 4 oz	1
I	2047	2047	SALT, TABLE	2 tsp	1

# RECIPES

## Nutrients Tab

The **Nutrients** tab does not require any data entry. This tab automatically displays the nutritional values for each ingredient and for the total recipe per portion size.

Verify the information is correct on the **Nutrients** tab. If the numbers are either too high or too low, confirm the information was entered properly under the **General** and **Ingredients** tabs.

Ingredients	Portion Cost	Total Cost	Calories <sup>1</sup> (kcal)	Saturated <sup>1</sup> Fat (g)	Sodium <sup>1</sup> (mg)	Sugars (g)	Total Fat (g)
ALMONDS			326	2.115	0.567	*N/A*	28.021
<b>Totals Per :</b>							
<b>Nutritional Values:</b>	\$0.000	\$0.000	326	2.115	0.567	*N/A*	28.021
<b>% of Caloric Makeup:</b>				5.840%		*N/A%*	77.353%

Grams per of them: 57

<sup>1</sup>- denotes required nutrient values.  
<sup>2</sup>- Trans Fat value is provided for informational purposes only, not for monitoring purposes.  
\* denotes combined nutrient totals with either missing or incomplete nutrient data.  
\*N/A\* denotes a nutrient that is either missing or incomplete for an individual ingredient.

## Batch Quantities Tab

**Batch Quantities** are equivalent measures of the original recipe. This allows you to use these measures when adding this recipe to another recipe.

1. Click **Batch Quantities** tab. If the recipe will be used within other recipes, enter the appropriate batch quantities.
2. Click **Add**.

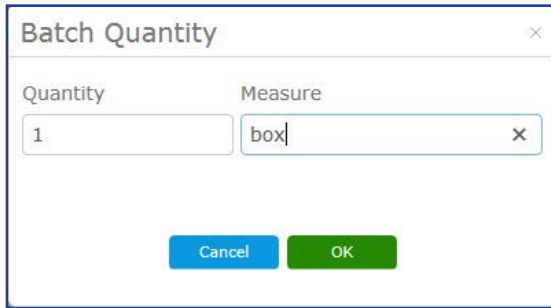
Quantity	Measure
----------	---------

**Add** Number of Portions: 1 Portion Size: package



# RECIPES

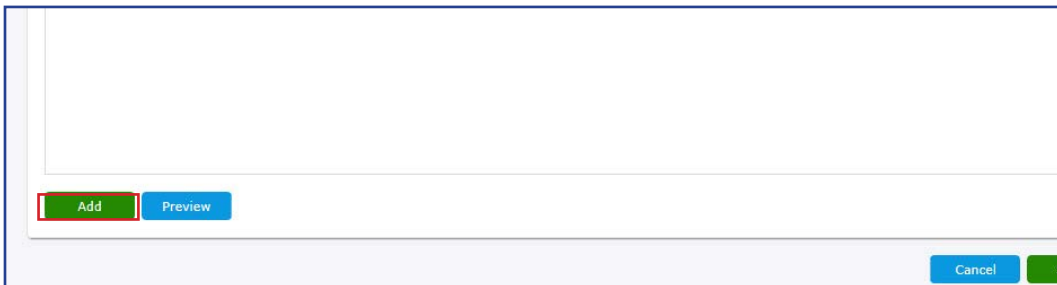
3. Enter the appropriate quantity.
4. In the **Measure** field, enter the appropriate portion size of the batch quantity.
5. Click **OK**.



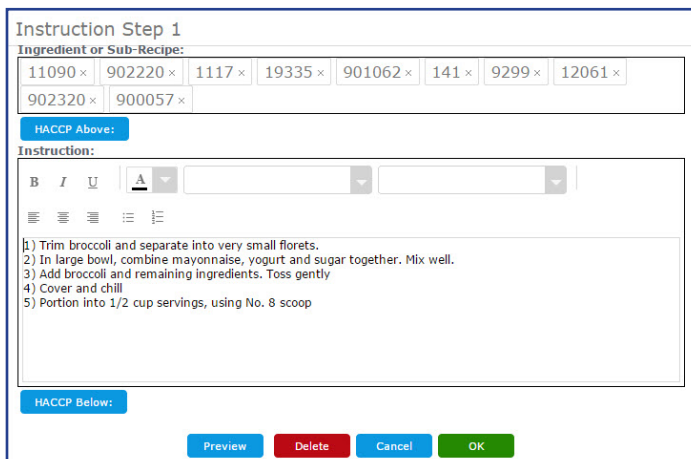
## Instruction Tab

The **Instructions** tab allows you to enter specific instructions on how to prepare a recipe.

1. Select the **Instruction** tab.



2. Click **Add**.
3. Click within the **Ingredient or Sub-Recipe** field, and then select the ingredient or sub-recipe.
4. To add HACCP instructions, click either **HACCP Above** (to add instructions before the step) or **HACCP Below** (to add instructions after the step), enter instructions, and click **OK**.
5. In the **Instruction** field, add the instructions for Step 1, of the corresponding ingredient or sub-recipe. The Instruction field does not have a character limit. Use the formatting options to stylize the text.
6. When finished, click **OK**.
7. Repeat steps 8a - 8d for each instruction step.
8. To see how the steps will look when publishing them, click **Preview**.



# RECIPES

## Components Tab

The **Components** tab is used for defining the Food-Based Components represented in the recipe being added. Refer to the [Certification of Compliance](#) topic for more details on food-based components.

1. Select the **Components** tab.
2. In the Food-Based Components section, specify the components present in the recipe you are adding. The values used in these measurements may be expressed as decimals or as fractions. Fractions will be automatically converted into decimals.
  - Under Meat/ALT, enter the amount of meat or meat alternative present in the recipe in ounces. Check **Count as Grain During Breakfast** if the recipe will be served as part of a reimbursable meal during breakfast.
  - Under Grains, enter the amount of grains present in the recipe in ounces.
  - Under Fruit, enter the amount of fruit present in the recipe in cups.
  - Under Vegetable, enter the amount of vegetables present in the recipe in cups.
  - Under Milk, enter the amount of milk present in the recipe in cups. If milk is present, specify the type of milk (non-fat, 1%, etc.) using the **Milk Type** drop-down menu.

Subgroup	Contribution Amt	Veg Type	Veg Name
----------	------------------	----------	----------

3. In the Subgroup section, if any of your components belong to subgroups, click **Add** to begin defining the subgroups. Refer to the [Certification of Compliance](#) topic for more details on food-based component subgroups.
4. Select the appropriate subgroup from the **Subgroup** drop-down menu.
5. Enter the amount of the contribution belonging to the subgroup under **Contribution Amt**. The amount entered can be expressed as either a decimal or a fraction.
6. Click **OK**.

Subgroup Edit

Subgroup: [dropdown]

Contribution Amt: 0 cup

Cancel OK

Per USDA guidelines all subgroup contribution amounts will be rounded down to the nearest creditable serving.

# RECIPES

## Allergens Tab

The **Allergens** tab allows you to flag anything in the recipe that might cause an allergic reaction due to allergens. Information on this tab is automatically populated using information from the ingredients that are used in the recipe or the recipes within the current recipe.

Select the Allergens tab and review allergens.

I/R	Item #	Description	Allergens
I	12061	ALMONDS	TreeNut

## Notes Tab

The **Notes** tab is used to record any additional information that you may want to include with this recipe that is not covered in any of the preceding tabs. The available fields are Production Notes, Purchasing Guide, Recipe Details, Serving Notes, and Miscellaneous Notes. The information on the Notes tab can be printed on a custom Production Record report.

Select the **Notes** tab to review notes.

Production Notes:

Purchasing Guide:

Recipe Details:

Serving Notes:

Miscellaneous Notes:

# RECIPES

## Attachments Tab

The **Attachments** tab allows you to import files, images, or text documents that back up the details entered for the nutrients in the recipe, such as an image of an ingredient's Nutrition Facts label.

1. Select the **Attachments** tab.
2. Click the **Add** button.
3. Enter a description for the attachment.
4. Click **Browse** and select the file you would like to attach. The compatible file types are .gif, .jpg, .png, .xls, .doc, and .txt.

**Note:** The attachment file's name cannot include commas.

5. After selecting the file, click **Attach**.



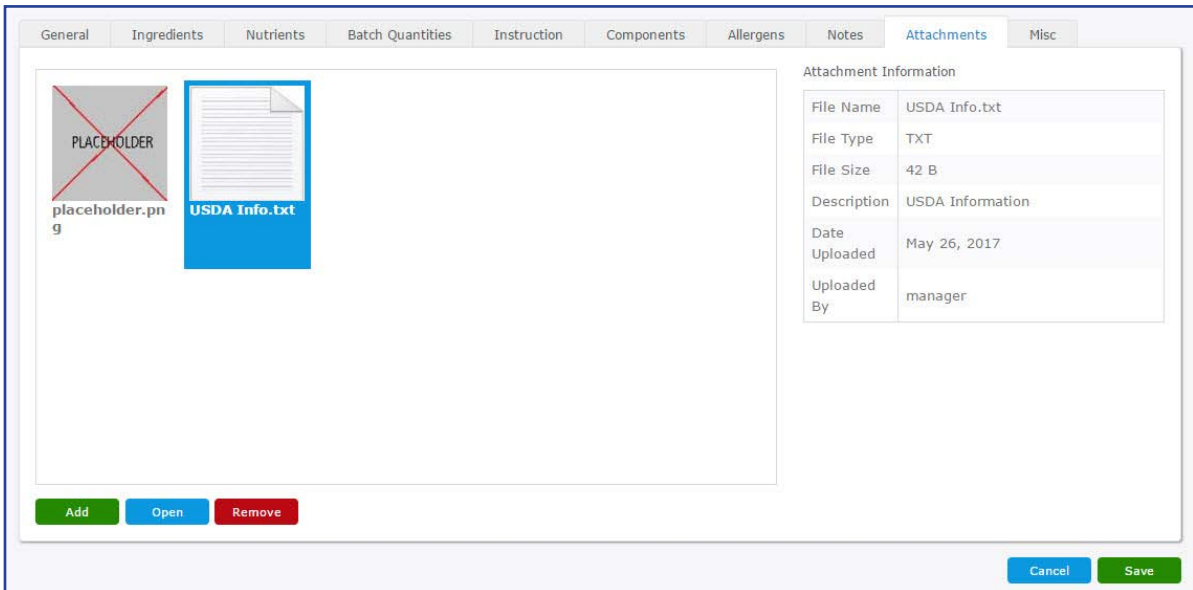
**Add Attachment**

Description: USDA Information

File Selected: USDA Info.txt

Browse Cancel Attach

6. Attachments appear in a window. Selecting an attachment will show detailed information about the attached file, such as date uploaded and the user who uploaded the file.
7. To open a copy of an attachment, click the attached file and click the **Open** button.
8. To delete an attachment from the recipe, click the attached file and click the **Remove** button.



General Ingredients Nutrients Batch Quantities Instruction Components Allergens Notes **Attachments** Misc

Attachment Information

File Name	USDA Info.txt
File Type	TXT
File Size	42 B
Description	USDA Information
Date Uploaded	May 26, 2017
Uploaded By	manager

Add Open Remove Cancel Save

## Misc Tab

The **Misc** tab provides you with the ability to enter moisture and fat changes.

1. Select the **Misc** tab.
2. Click **Find** to search for the type of fat.

The screenshot shows the 'Misc' tab in a software application. The 'Moisture & Fat Change' section contains three input fields: 'Moisture Change' with a value of 0, 'Fat Change' with a value of 0, and 'Type of Fat'. Below these fields are two buttons: 'Find' (highlighted with a red box) and 'Clear'. At the bottom right of the tab, there are 'Cancel' and 'Save' buttons.

3. In the **Ingredient # or Description** search field, enter the first few characters of the ingredient and click **Search**. Source is optional.
4. Select the ingredient to be added by clicking on **Add**.

The screenshot shows a 'Type of Fat' search dialog box. It has a search field labeled 'Ingredient # or Description' and a 'Source' dropdown menu. Below the search field is a table of results. The table has columns for Ingredient #, Description, Source, Class, CN Code, Manufacturer, and Product. The 'Add' button is highlighted in blue for each row.

	Ingredient #	Description ^	Source	Class	CN Code	Manufacturer	Produ
<a href="#">Add</a>	118524	100% Whole Wheat Bagel	USDA	GRAIN	118524	Pinnacle Foods Group, LLC	218
<a href="#">Add</a>	118527	100% Whole Wheat Bagel	USDA	GRAIN	118527	Pinnacle Foods Group, LLC	18
<a href="#">Add</a>	117557	4X6 WHOLE GRAIN FFK 100% MOZZ CHEESE PIZZA	USDA	MEALS	117557	ConAgra Foods, Inc.	77387 12584
<a href="#">Add</a>	117558	4X6 WHOLE GRAIN FFK 100% MOZZ PEPPERONI PIZZA	USDA	MEALS	117558	ConAgra Foods, Inc.	77387 12585

5. Enter in the % of **Moisture Change** and **Fat Change** associated with the selected fat, and click **Save**.

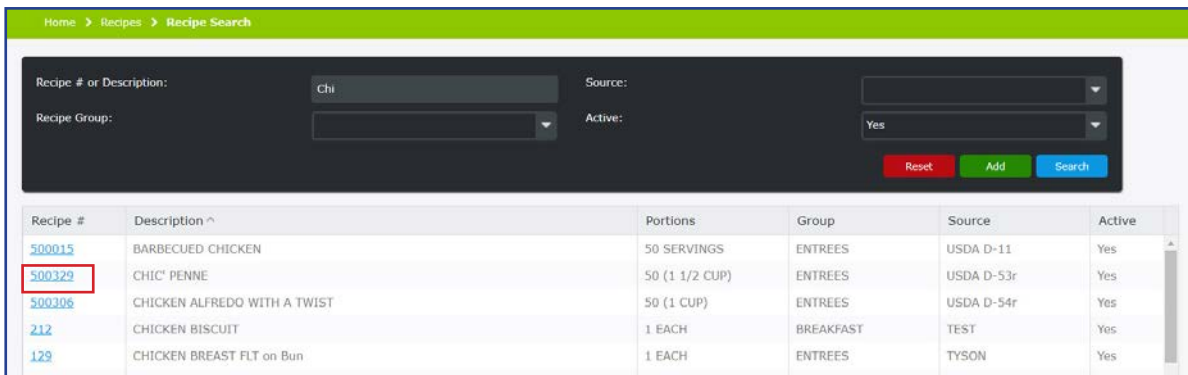
When finished adding all information for all tabs in the recipe, click **Save**.

## Modifying Recipes

This database will also contain any recipes you enter locally. You may open existing recipes and review them or modify them.

1. From the left-hand navigation bar, click **Recipes**.
2. Click **Maintenance**.
3. In the **Recipe # or Description** search field, enter the first few characters of the recipe name and click **Search**.
4. Open the recipe by clicking on the **Recipe #** hyperlink in the left-hand column.

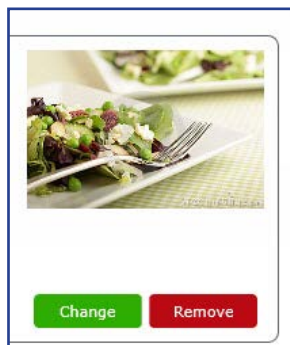
**Note:** After opening the recipe, all information is available for review or modification. The process of modifying a recipe is virtually identical to adding a recipe. Refer to the [Adding Recipes](#) topic for instructions on adding and modifying recipe information.



The screenshot shows a web interface for searching recipes. At the top, there is a breadcrumb trail: Home > Recipes > Recipe Search. Below this is a search form with the following fields: 'Recipe # or Description:' containing 'Chi', 'Source:' with a dropdown menu, 'Recipe Group:' with a dropdown menu, and 'Active:' with a dropdown menu set to 'Yes'. There are three buttons: 'Reset' (red), 'Add' (green), and 'Search' (blue). Below the search form is a table with the following columns: 'Recipe #', 'Description ^', 'Portions', 'Group', 'Source', and 'Active'. The table contains five rows of data, with the second row highlighted in red.

Recipe #	Description ^	Portions	Group	Source	Active
<a href="#">500015</a>	BARBECUED CHICKEN	50 SERVINGS	ENTREES	USDA D-11	Yes
<a href="#">500329</a>	CHIC' PENNE	50 (1 1/2 CUP)	ENTREES	USDA D-53r	Yes
<a href="#">500308</a>	CHICKEN ALFREDO WITH A TWIST	50 (1 CUP)	ENTREES	USDA D-54r	Yes
<a href="#">212</a>	CHICKEN BISCUIT	1 EACH	BREAKFAST	TEST	Yes
<a href="#">129</a>	CHICKEN BREAST FLT on Bun	1 EACH	ENTREES	TYSON	Yes

One of the few differences is that, for recipes that already have a photo, you must click **Change** to edit the file used for the photo, or you can click **Remove** to clear the image from the recipe.




# RECIPES

5. Select the **Reports** tab. The Recipe Prep Sheet is only available when modifying a recipe. The Recipe Prep Sheet allows the user to size the recipe; that is, you can change the number of portions to generate a sizing report. The Recipe Prep Sheet can be printed in a **Detail** or **Summary** format. It displays as a **PDF** or **Report Viewer**.
  - a. In the **Number of Portions** field, put in the number you wish to print the Prep Sheet for.
  - b. Select the appropriate Report Type, **Summary** or **Detail**. The Detail Report includes instructional information entered on the Instruction tab.
  - c. Select whether to use production specifications. Selecting **Yes** will scale and print the recipe using production specifications associated with the ingredients.
  - d. Select whether to include the recipe photo with the report.
  - e. Select the **Display Type** (PDF or Report Viewer).
  - f. Click **Display Report**.

The Recipe Prep Sheet includes nutrient information for the current recipe, as well as instructions entered for the recipe. This list can also be generated on inactive recipes.

### MOSAIC

Recipe Prep Sheet



**990006 - ALMOND BROCCOLI SALAD W/TURKEY**  
 Recipe HACCP Process: #2 Same Day Service  
 Source: ALMOND BOARD  
 Number of Portions: 60  
 Portion Size: 1/2 CUP

Ingredient #	Ingredient Name	Measurements	Instructions
011090	BROCCOLI,RAW	17 1/2 qt. florets	1) Trim broccoli and separate into very small florets. 2) In large bowl, combine mayonnaise, yogurt and sugar together. Mix well. 3) Add broccoli and remaining ingredients. Toss gently 4) Cover and chill 5) Portion into 1/2 cup servings, using No. 8 scoop
902227	SALAD DRSG.MAYO TYPE,RED CAL-COMMOD	2 1/2 cup	
001117	YOGURT,PLN,LOFAT,12 GRAMS PROT PER 8 OZ	3 3/4 CUP	
019335	SUGARS,GRANULATED	1 CUP	
901016	ONIONS,RED,RAW	1 3/4 CUP, chopped + 2 tbsp, chopped	
000141	BACON BITS, IMITATION	1/2 cup	
006298	RAISINS,SEEDLESS	5 CUP, packed	
012091	ALMONDS	1 3/4 CUP, slivered + 2 tbsp, slivered	
902327	TURKEY,DICED,CHK,FROZEN-COMMOD	3 3/4 LB	

\*Nutrients are based upon 1 Portion Size (1/2 CUP)

Calories*	199.987 kcal	Total Fat	5.980 g	Total Dietary Fiber	3.908 g	Vitamin C	92.387 mg	26.912% Calories from Total Fat
Saturated Fat*	1.156 g	Trans Fat*	0.000* g	Protein	13.612 g	Iron	1.883 mg	5.200% Calories from Sat Fat
Sodium*	181.007 mg	Cholesterol	27.301 mg	Vitamin A	652.560 IU	Water	135.257 g	0.001%* Calories from Trans Fat

## Copying Recipes

To ensure you maintain the integrity of the original recipe in the database, we strongly suggest duplicating the original recipe *before* making modifications. Modifying a recipe on a menu that exists on a previous menu will change the history of that recipe and will affect your previous menu's nutritional values.

1. From the left-hand navigation bar, click **Recipes**.
2. Click **Maintenance**.
3. In the **Recipe # or Description** search field, enter the first few characters of the recipe name and click **Search**.
4. Open the recipe by clicking the **Recipe #** hyperlink in the left-hand column.
5. Click **Copy**.  
The recipe is automatically assigned a new recipe number. You can continue to work with the duplicated recipe to make modifications.
6. Make necessary changes to the recipe. Refer to the Add Recipes topic for specific instructions on adding and modifying a recipe.
7. When finished, click **Save**.

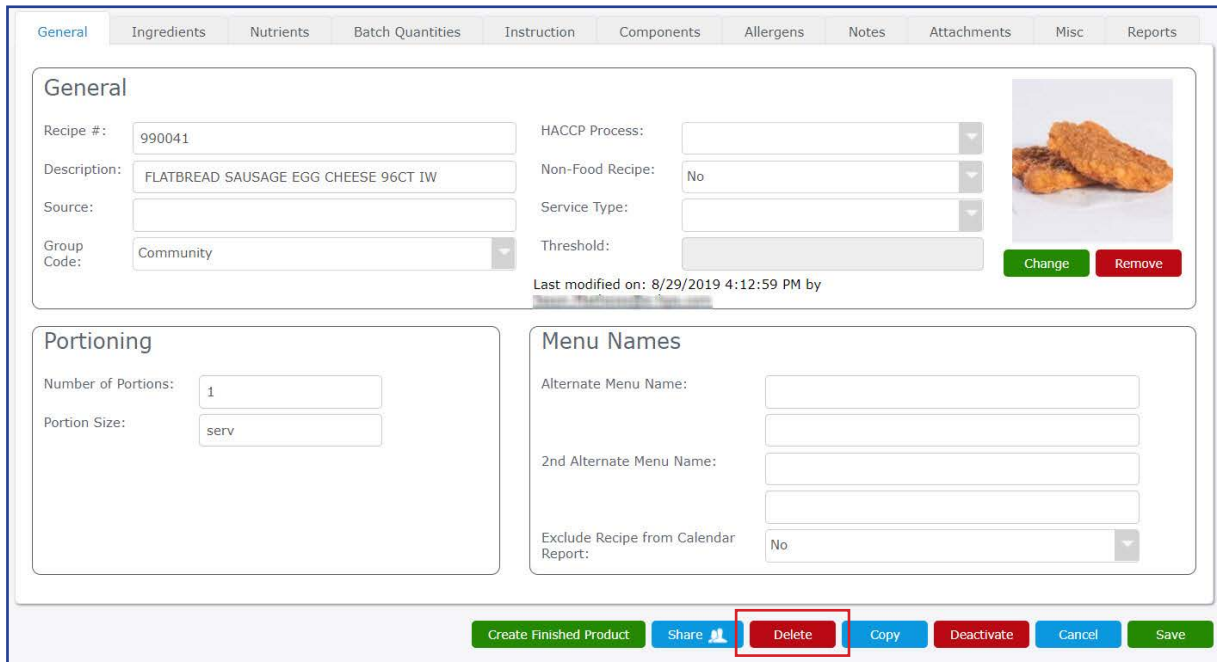
The screenshot displays the 'General' tab of a recipe management system. The 'Recipe #' field is populated with 'p90042' and has a yellow 'Duplicated Recipe' label. The 'Description' is 'ALMONDS', 'Source' is 'TEST', and 'Group Code' is 'SNACKS'. There are dropdown menus for 'HACCP Process', 'Non-Food Recipe' (set to 'No'), 'Service Type', and 'Threshold'. An image upload area shows 'NO IMAGE' and 'AVAILABLE' with a camera icon and 'Add'/'Remove' buttons. The 'Portioning' section includes 'Number of Portions' (1) and 'Portion Size' (oz). The 'Menu Names' section has 'Alternate Menu Name' (test alt 1), '2nd Alternate Menu Name' (test alt 2), and 'Exclude Recipe from Calendar Report' (No). At the bottom right, there are 'Cancel' and 'Save' buttons, with 'Save' highlighted by a red box.



## Deleting Recipes

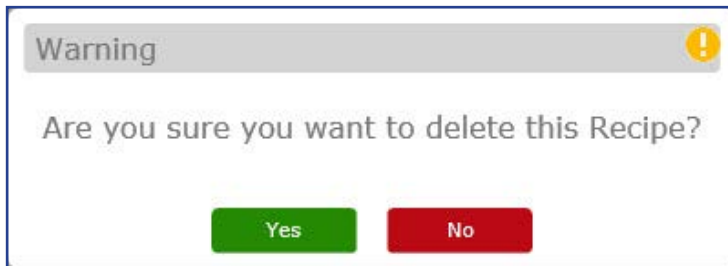
If you have a recipe that you do not plan on using anymore, you may delete it. Make sure to remove this recipe from any menus to which it is attached; otherwise, you will not be able to delete the recipe.

1. From the left-hand navigation bar, click **Recipes**.
2. Click **Maintenance**.
3. In the **Recipe # or Description** search field, enter the first few characters of the recipe name and click **Search**.
4. Open the recipe by clicking the Recipe # hyperlink in the left-hand column.
5. Click **Delete**.



The screenshot shows a web application interface for managing recipes. At the top, there are tabs for 'General', 'Ingredients', 'Nutrients', 'Batch Quantities', 'Instruction', 'Components', 'Allergens', 'Notes', 'Attachments', 'Misc', and 'Reports'. The 'General' tab is active. Below the tabs, there are several input fields and dropdown menus for recipe details. The 'Recipe #' field contains '990041'. The 'Description' field contains 'FLATBREAD SAUSAGE EGG CHEESE 96CT IW'. The 'Group Code' dropdown is set to 'Community'. There is a 'HACCP Process' dropdown, a 'Non-Food Recipe' dropdown set to 'No', and a 'Service Type' dropdown. A 'Threshold' field is also present. To the right of these fields is a small image of a flatbread sandwich. Below the image are 'Change' and 'Remove' buttons. At the bottom of the form, there is a row of buttons: 'Create Finished Product', 'Share', 'Delete' (highlighted with a red box), 'Copy', 'Deactivate', 'Cancel', and 'Save'. The 'Delete' button is the one to be clicked according to the instructions.

6. A confirmation window will pop up. Click **Yes** to delete the recipe.

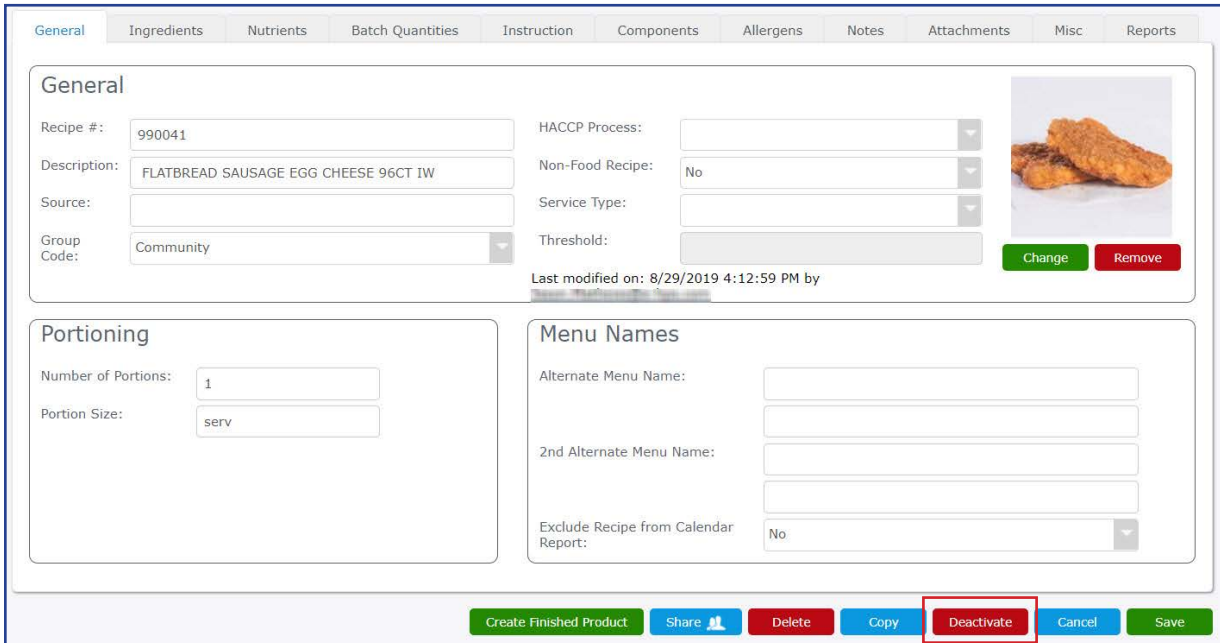


The screenshot shows a warning dialog box with a yellow warning icon in the top right corner. The text inside the dialog reads: 'Warning' followed by 'Are you sure you want to delete this Recipe?'. At the bottom of the dialog, there are two buttons: a green 'Yes' button and a red 'No' button.

## Activating and Deactivating Recipes

### Deactivate

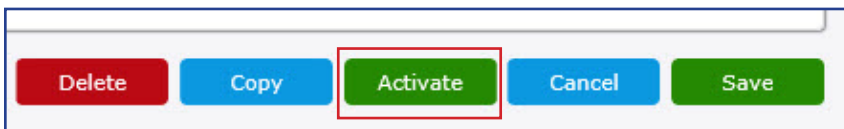
1. From the left-hand navigation bar, click **Recipes**.
2. Click **Maintenance**.
3. In the **Recipe # or Description** search field, enter the first few characters of the recipe name and click **Search**.
4. Open the recipe by clicking on the Recipe # hyperlink in the left-hand column.
5. Click **Deactivate**.



The screenshot displays a recipe management interface with several tabs: General, Ingredients, Nutrients, Batch Quantities, Instruction, Components, Allergens, Notes, Attachments, Misc, and Reports. The 'General' tab is active, showing fields for Recipe # (990041), Description (FLATBREAD SAUSAGE EGG CHEESE 96CT IW), Source, Group Code (Community), HACCP Process, Non-Food Recipe (No), Service Type, and Threshold. A 'Last modified on' timestamp is visible. Below the general information are sections for 'Portioning' (Number of Portions: 1, Portion Size: serv) and 'Menu Names' (Alternate Menu Name, 2nd Alternate Menu Name, Exclude Recipe from Calendar Report: No). At the bottom, a row of action buttons includes 'Create Finished Product', 'Share', 'Delete', 'Copy', 'Deactivate' (highlighted with a red box), 'Cancel', and 'Save'. A small image of a fried food item is also present.

### Activate

1. From the left-hand navigation bar, click **Recipes**.
2. Click **Maintenance**.
3. In the **Recipe # or Description** search field, enter the first few characters of the recipe name and click **Search**.
4. Set Active to **No**.
5. Open the recipe by clicking on the **Recipe #** hyperlink in the left-hand column.
6. Click **Activate**.

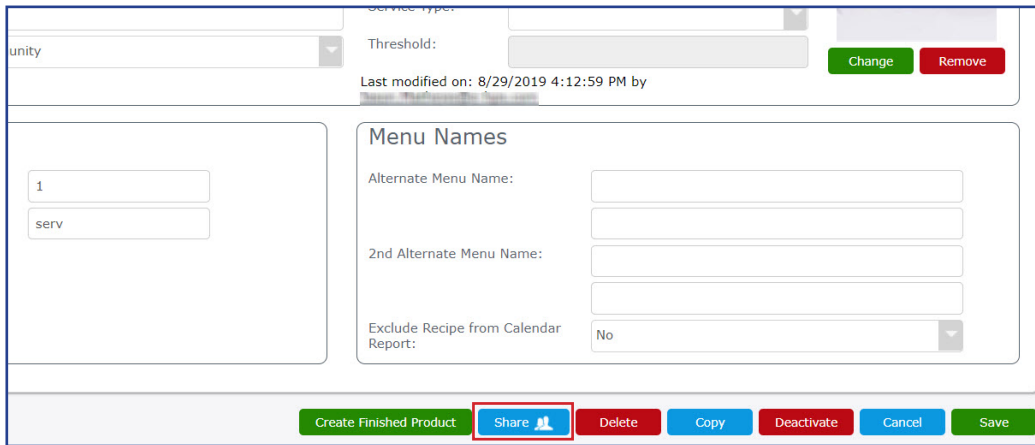


This is a close-up view of the bottom action bar from the recipe management interface. It shows five buttons: 'Delete' (red), 'Copy' (blue), 'Activate' (green, highlighted with a red box), 'Cancel' (blue), and 'Save' (green).

## Sharing Recipes

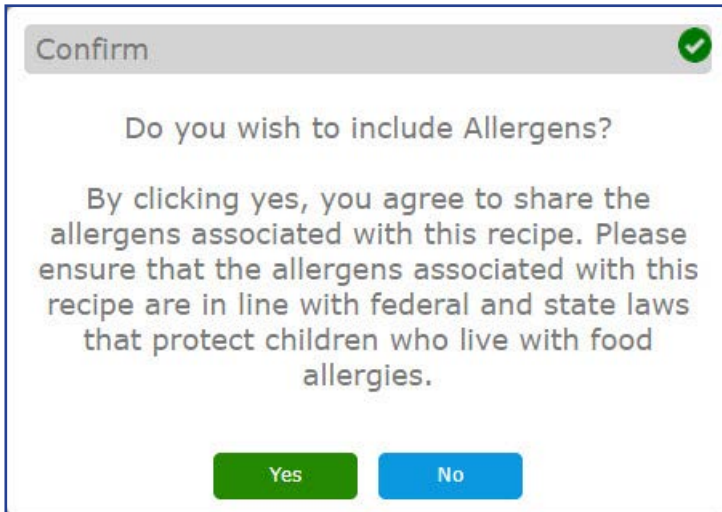
Using the Share button on a created recipe lets you share your recipe with Mosaic users in other districts. Shared recipes appear on the Communities tab, where Mosaic users can search for and import them into their own recipe databases. For more information on how you can import shared recipes, see the section in this guide on the [Communities](#) tab.

1. From the left-hand navigation bar, click **Recipes**.
2. Click **Maintenance**.
3. In the **Recipe # or Description** search field, enter the first few characters of the recipe name and click **Search**.
4. Open the recipe by clicking on the Recipe # hyperlink in the left-hand column.
5. Click **Share**.



The screenshot shows a recipe maintenance form. At the top, there are fields for 'Service Type' and 'Threshold', along with 'Change' and 'Remove' buttons. Below this, it says 'Last modified on: 8/29/2019 4:12:59 PM by [user]'. The main area is divided into two columns. The left column has input fields for '1' and 'serv'. The right column is titled 'Menu Names' and contains fields for 'Alternate Menu Name', '2nd Alternate Menu Name', and a dropdown for 'Exclude Recipe from Calendar Report' set to 'No'. At the bottom, there is a row of buttons: 'Create Finished Product', 'Share' (highlighted with a red box), 'Delete', 'Copy', 'Deactivate', 'Cancel', and 'Save'.

6. Select **Yes** if you would like to share allergens associated with the recipe. If you do not want to share associated allergens, click **No**.



The dialog box has a title bar 'Confirm' with a green checkmark icon. The main text asks: 'Do you wish to include Allergens?'. Below this, it provides a warning: 'By clicking yes, you agree to share the allergens associated with this recipe. Please ensure that the allergens associated with this recipe are in line with federal and state laws that protect children who live with food allergies.' At the bottom, there are two buttons: 'Yes' (green) and 'No' (blue).

- Review the information on the recipe being shared, and then click **Upload to Community**.  
**Note:** If you selected to share recipe allergens, the Allergen tab is displayed with details. If you did not select to share recipe allergens, no Allergen tab is displayed.

**Share This Recipe**

Take your new creation and share it with other Mosaic users in the Community section. Here's a preview of how it will look when it's posted to the community. Don't worry, you can always unshare it later if you'd like.

NO IMAGE

AVAILABLE

APPLE/PEAR CRISP

Portion: 50 SERVINGS

By Heartland School Solutions

I/R	Item #	CN Code	Description	Measure
I	<a href="#">20581</a>	20581	WHEAT FLR,WHITE,ALL-PURPOSE,ENR,UNBLEACHED	14 oz
I	<a href="#">20038</a>	20038	OATS	9 oz
I	<a href="#">19334</a>	19334	SUGARS,BROWN	15 oz
I	<a href="#">2010</a>	2010	CINNAMON,GROUND	1 TBSP + 1.5 TSP
I	<a href="#">2047</a>	2047	SALT,TABLE	.5 tsp
I	<a href="#">799915</a>		MARGARINE,REG,HARD,SOYBN (HYDR)&CTTNSD	1 LB
I	<a href="#">50356</a>	50356	APPLES, CANNED, UNSWEETENED, SLICED, IN WATER	.5 #10 CAN
I	<a href="#">9256</a>	9256	PEARS,CND,LT SYRUP PK,SOL&LIQUIDS	.5 #10 CAN
I	<a href="#">14429</a>	14429	WATER,MUNICIPAL	1 As Needed
I	<a href="#">19335</a>	19335	SUGARS,GRANULATED	10.5 oz
I	<a href="#">2010</a>	2010	CINNAMON,GROUND	1.5 TSP
I	<a href="#">9154</a>	9154	LEMON JUC,FRZ,UNSWTND,SINGLE STRENGTH	.25 CUP

Back
Upload to Community

**Share This Recipe**

Take your new creation and share it with other Mosaic users in the Community section. Here's a preview of how it will look when it's posted to the community. Don't worry, you can always unshare it later if you'd like.

ALMOND BROCCOLI SALAD W/TURKEY

Portion: 60 (1/2 CUP)

By MOSAIC

I/R	Item #	CN Code	Description	Measure
I	<a href="#">11090</a>	11090	BROCCOLI,RAW	17.5 qt, florets
I	<a href="#">902227</a>		SALAD DRSG,MAYO TYPE,RED CAL-COMMOD	2.5 cup
I	<a href="#">1117</a>	1117	YOGURT,PLN,LOFAT,12 GRAMS PROT PER 8 OZ	3.75 CUP
I	<a href="#">19335</a>	19335	SUGARS,GRANULATED	1 CUP
I	<a href="#">901016</a>		ONIONS,RED,RAW	1.75 CUP, chopped + 2 tbsp, chopped
I	<a href="#">141</a>		BACON BITS, IMITATION	.5 cup
I	<a href="#">9298</a>	9298	RAISINS,SEEDLESS	5 CUP, packed
I	<a href="#">12061</a>	12061	ALMONDS	1.75 CUP, slivered + 2 tbsp, slivered
I	<a href="#">902327</a>		TURKEY,DICED,CKD,FROZEN-COMMOD	3.75 LB

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Upload to Community

- After uploading, a confirmation message will appear at the top of the page.

MOSAIC
Recipe shared to Community 9/21/2016

Home > Recipes > Recipe Search > Edit : 990006 - ALMOND BROCCOLI SALAD W/TURKEY

**General** | Ingredients | Nutrients | Batch Quantities | Instruction | Components | Allergens

---

**General**

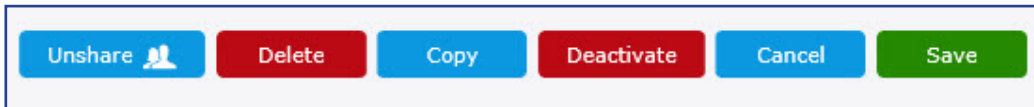
Recipe #: 990006 HACCP Process: #2 Same Day Service

# RECIPES

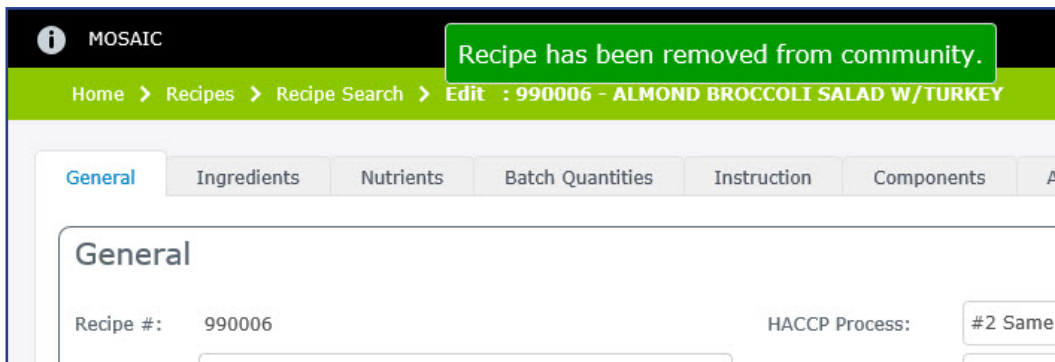
## Unsharing a Recipe

You have the ability to remove a recipe you have shared from the Community resource. This can be done if a recipe was uploaded by mistake or has been updated and needs to be uploaded again.

1. From the left-hand navigation bar, click **Recipes**.
2. Click **Maintenance**.
3. In the **Recipe # or Description** search field, enter the first few characters of the recipe name and click **Search**.
4. Open the recipe by clicking on the Recipe # hyperlink in the left-hand column.
5. Click **Unshare**.



6. After unsharing, a confirmation message will appear at the top of the page.



## Creating Products from Recipes

If you have a recipe off of which you would like to base a new product, you may create a product from that recipe. This allows the recipe to be stored in inventory as a product, which can help food service administrators link recipes in menus to the Central Kitchen as finished products.

1. From the left-hand navigation bar, click **Recipes**.
2. Click **Maintenance**.
3. In the **Recipe # or Description** search field, enter the first few characters of the recipe name and click **Search**.
4. Open the recipe by clicking the Recipe # hyperlink in the left-hand column.
5. Click **Create Finished Product**.

6. A Product page loads, showing item information taken from the source recipe. You may edit this information as needed.
7. Click **Save**.

# RECIPES

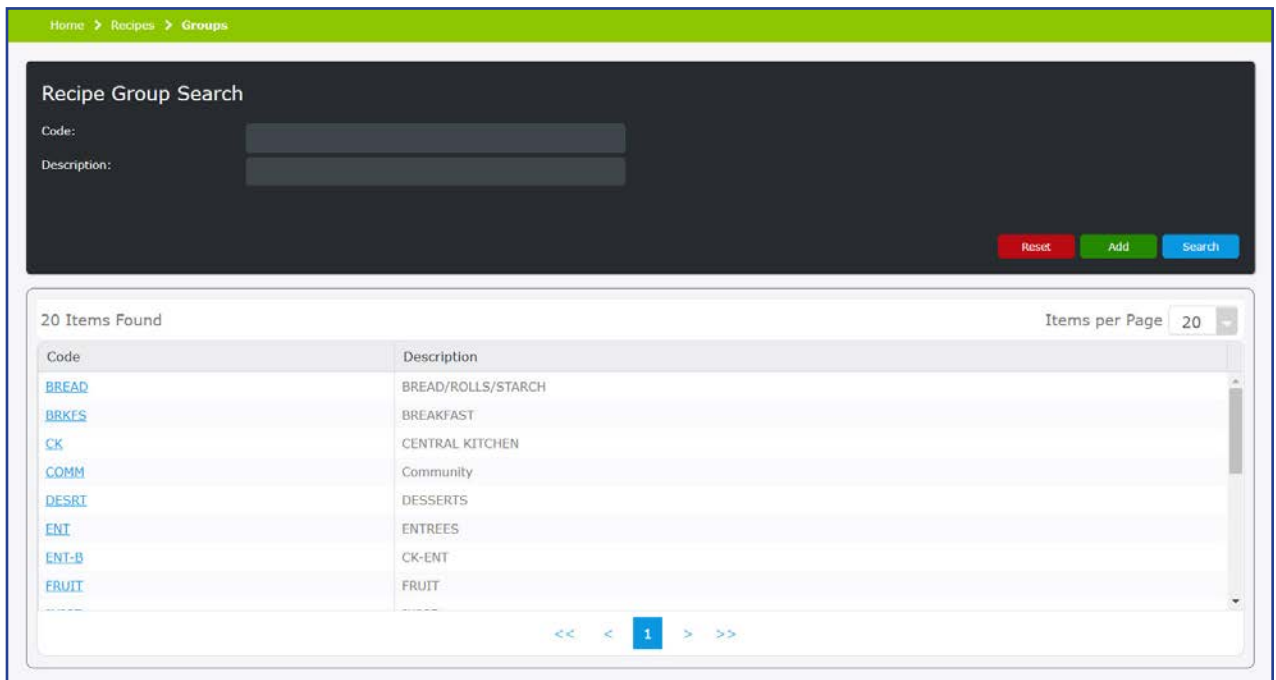
## Groups

Adding, modifying, or deleting a recipe group code can be performed from within the **Recipes** tab.

Perform the following procedure to search for recipe groups.

1. From the left-hand navigation bar, click **Recipes**.
2. Click **Groups**.
3. Select your search criteria.  
**Note:** The filters can be left blank to display all products in the search results.
4. Click **Search** or press **Enter**.

The search result grid conveniently displays the number of recipe groups found. When your search grid presents more recipe groups than can be displayed on one page, you can use the paging controls to navigate through the results. Additionally, you can adjust the Items per page by selecting the desired value from the drop-down menus.



The screenshot shows the 'Recipe Group Search' interface. At the top, there is a breadcrumb trail: Home > Recipes > Groups. Below this, the search area has two input fields: 'Code:' and 'Description:'. To the right of these fields are three buttons: 'Reset' (red), 'Add' (green), and 'Search' (blue). Below the search area, a table displays 20 items found. The table has two columns: 'Code' and 'Description'. The 'Code' column contains hyperlinks for each item. The 'Description' column contains the corresponding description. At the bottom of the table, there are paging controls: '<<', '<', '1', '>', and '>>'. To the right of the table, there is a dropdown menu for 'Items per Page' set to '20'.

Code	Description
<a href="#">BREAD</a>	BREAD/ROLLS/STARCH
<a href="#">BRKFS</a>	BREAKFAST
<a href="#">CK</a>	CENTRAL KITCHEN
<a href="#">COMM</a>	Community
<a href="#">DESRT</a>	DESSERTS
<a href="#">ENT</a>	ENTREES
<a href="#">ENT-B</a>	CK-ENT
<a href="#">FRUIT</a>	FRUIT

5. Click the hyperlink in the **Code** column to open the product.

## Add

1. From the left-hand navigation bar, click **Recipes**.
2. Click **Groups**.
3. Click **Add**.
  - a. In the **Code** field, type the new code.
  - b. In the **Description** field, type the description for the group.
  - c. Click **Save**.

Home > Recipes > Groups > Edit

Recipe Group

Code:

Description:

## Modify or Delete

Perform the following procedure to modify or delete an existing group.

1. Enter the first few characters of the group in the **Code or Description** search field, and click **Search**.
2. Open the group by clicking on the **Code** hyperlink in the left-hand column.

Home > Recipes > Groups

Recipe Group Search

Code:

Description:

20 Items Found Items per Page 20

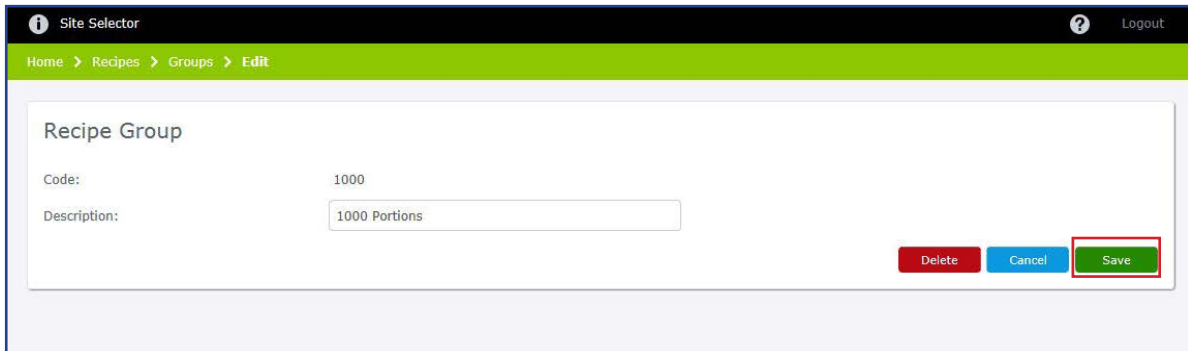
Code	Description
<a href="#">BREAD</a>	BREAD/ROLLS/STARCH
<a href="#">BRKFS</a>	BREAKFAST
<a href="#">CK</a>	CENTRAL KITCHEN
<a href="#">COMM</a>	Community
<a href="#">DESRT</a>	DESSERTS
<a href="#">ENT</a>	ENTREES
<a href="#">ENT-B</a>	CK-ENT
<a href="#">FRUIT</a>	FRUIT

<< < 1 > >>



# RECIPES

3. You can only change the **Description** of the group. A group description cannot be duplicated. The code cannot be modified.
4. To delete the recipe group, select **Delete**. You will be prompted to select a replacement recipe group for items assigned to this group, so be sure one has been entered.
5. Once complete, click **Save**.

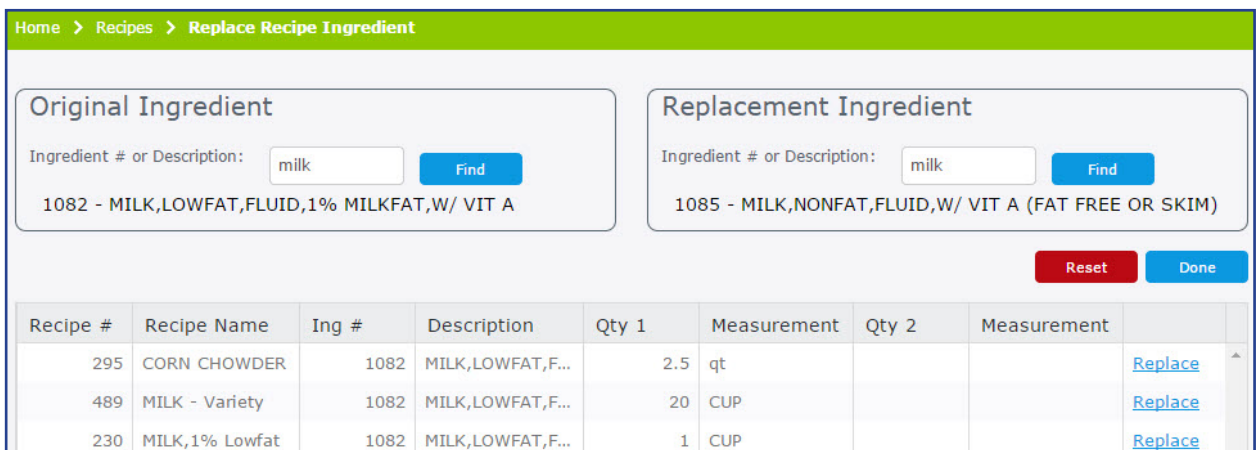


## Replace Recipe Ingredient

Replacing ingredients that make up a given recipe can be performed within the **Recipes** tab.

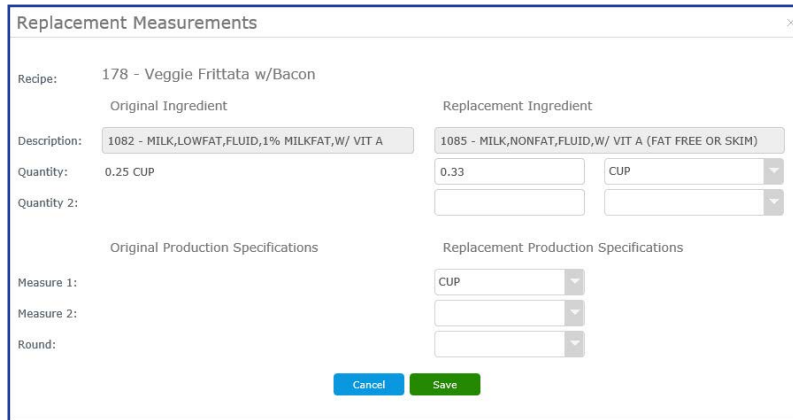
Perform the following steps to replace recipe ingredients:

1. From the left-hand navigation bar, click **Recipes**.
2. Click **Replace Recipe Ingredient**.
3. In the Original Ingredient pane, enter the first few characters of an ingredient's number or description in the text field and click **Find**. This will be the ingredient that gets replaced in the recipes.
4. A new window will pop up. From this window, select the desired ingredient and click **Select**.
5. In the Replacement Ingredient pane, enter the first few characters of an ingredient's number or description in the text field and click Find. This will be the ingredient that replaces the original.
6. A new window will pop up. From this window, select the desired ingredient and click **Select**.
7. A list will populate the field below. From this list, determine which recipes require their ingredients being replaced. Click **Replace** next to the recipes that need their ingredients replaced.



# RECIPES

- After clicking Replace, you will see the Replacement Measurements pop-up. If the measurements and production quantities for the replacement ingredient need to change, use the fields under Replacement Ingredient to indicate the changes. Click **Save** to finish replacing the ingredient.



The screenshot shows a 'Replacement Measurements' dialog box. At the top, it displays 'Recipe: 178 - Veggie Frittata w/Bacon'. Below this, there are two columns: 'Original Ingredient' and 'Replacement Ingredient'. Under 'Original Ingredient', the description is '1082 - MILK,LOWFAT,FLUID,1% MILKFAT,W/ VIT A' and the quantity is '0.25 CUP'. Under 'Replacement Ingredient', the description is '1085 - MILK,NONFAT,FLUID,W/ VIT A (FAT FREE OR SKIM)' and the quantity is '0.33 CUP'. There are also fields for 'Quantity 2' and 'Round'. At the bottom, there are 'Cancel' and 'Save' buttons.

- If there are more ingredients that need to be replaced, click **Reset** to clear all of the fields and repeat steps 3-8.
- When you are finished, click **Done**.

## Deactivate (Bulk)

In addition to deactivating recipes from their pages one at a time, you can deactivate multiple recipes at once on the **Recipes** tab using the **Deactivate (Bulk)** option. Deactivate (Bulk) allows you to deactivate recipes that have not been used on a menu within a certain date range. This allows you to keep your database free of data that is no longer in use and removes clutter when looking up recipes.

Perform the following steps to deactivate multiple recipes at once.

- From the left-hand navigation bar, click **Recipes**.
- Click **Deactivate (Bulk)**.
- In the pop-up, select a date. Any recipe that has not been used after that date will automatically be deactivated.
- Click **Yes** to begin deactivating recipes.



The screenshot shows a 'Warning' dialog box with a yellow warning icon. The text inside reads: 'Select the date to deactivate recipes that have not been used since:'. Below this is a date input field showing '4/7/2014' with a calendar icon. Below the date field is the question 'Do you wish to continue?'. At the bottom, there are two buttons: a green 'Yes' button and a red 'No' button.

- After some time, a message will appear stating how many recipes have been deactivated. Click **OK**.

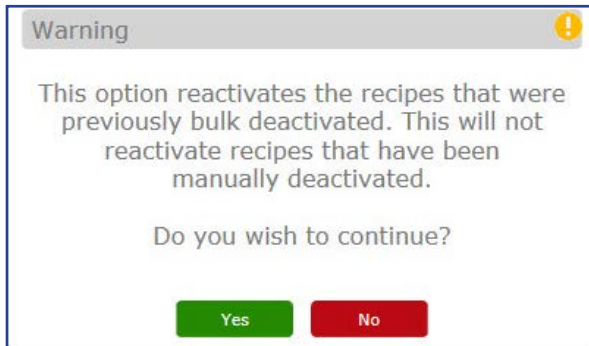
# RECIPES

## Reactivate (Bulk)

From the Recipes tab, you can reactivate multiple recipes simultaneously using the Reactivate (Bulk) option. Reactivate (Bulk) is specifically designed to reactivate recipes deactivated using the Deactivate (Bulk) option. It does not allow for reactivation of recipes that were deactivated manually.

Perform the following steps to reactivate recipes deactivated in bulk.

1. From the left-hand navigation bar, click **Recipes**.
2. Click **Reactivate (Bulk)**.
3. Click **Yes** to begin reactivating recipes.



4. A message will appear stating how many recipes have been reactivated. Click **OK**.

## Menu Overview

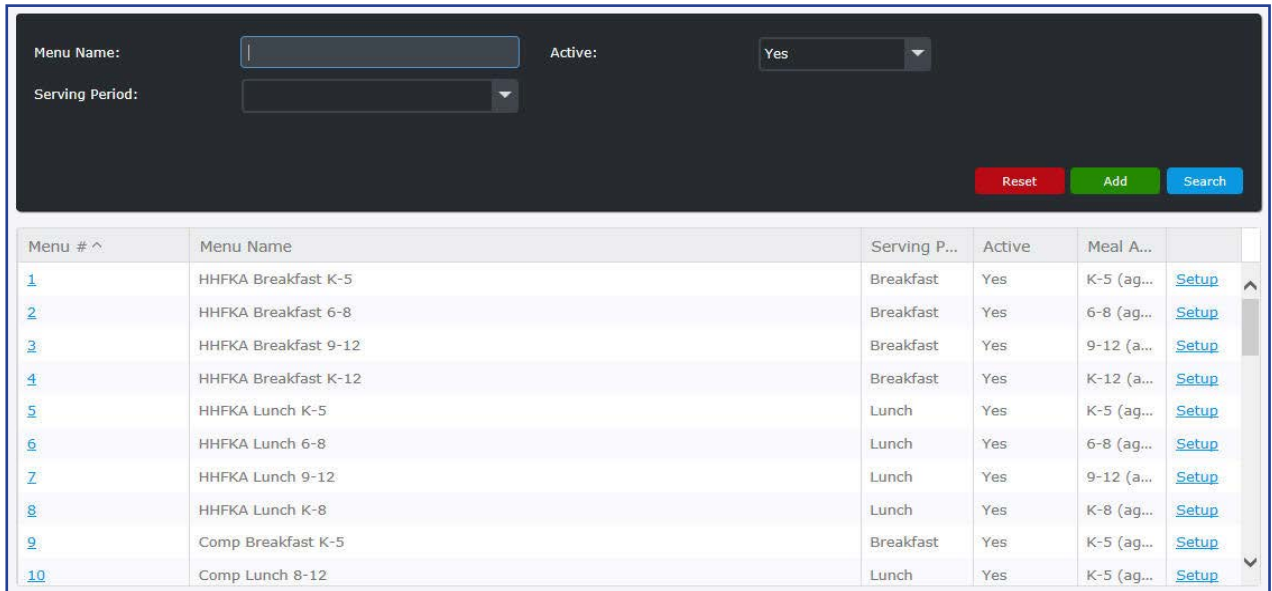
The Menu Planning section provides instructions for entering and printing menus, copying calendar menus, adding sites, entering production quantities, printing a nutritional analysis, and entering and using cycle menus.



## Maintenance

The Menu Maintenance screen provides various functions including modification, copying, viewing and printing of menus. You also have access to production records and quantities, nutrient breakdown, and weekly requirement information. Perform the following procedure to search for an existing menu.

1. Click **Menus**.
2. Click **Maintenance**.
3. Enter a menu name to find a specific cycle menu or leave the field blank for all menus.
4. Click **Search**.



## Establishing Menu Names and Nutrient Standards

Perform the following procedure to create a menu name and nutrient standard.

1. Click **Menus**.
2. Click **Maintenance**.
3. Click **Add**.

**Note:** Menus will open in the General tab.

**General**

Menu #: 43

Menu Name:

**Menu Planning Options**

Meal Pattern:

Serving Period:

Age/Grade Group:

**Nutrient Standards**

Calories - Min:	<input type="text"/>	Dietary Fiber:	<input type="text"/>	g*
Calories - Max:	<input type="text"/>	Protein:	<input type="text"/>	g*
Total Fat:	<input type="text"/>	Iron:	<input type="text"/>	mg*
Saturated Fat:	<input type="text"/>	Calcium:	<input type="text"/>	mg*
Cholesterol:	<input type="text"/>	Vitamin A:	<input type="text"/>	IU*
Sodium:	<input type="text"/>	Vitamin C:	<input type="text"/>	mg*
Carbohydrate:	<input type="text"/>	Sugars:	<input type="text"/>	g*

\* Denotes User Defined Fields

4. Add a Menu Name. There is a 50 character limit.

**General**

Menu #: 43

Menu Name:

**Examples of Menu Names:**

<b>For School Districts:</b>	<b>For RCCI's:</b>
Menu 1 Elementary Lunch Menu	Menu 1 Breakfast
Menu 2 Elementary Breakfast Menu	Menu 2 Lunch
Menu 3 Intermediate Lunch Menu	Menu 3 Dinner
Menu 4 Intermediate Breakfast Menu	Menu 4 Snack
Menu 5 High School Lunch Menu	

- Select a meal pattern from the **Meal Pattern** drop-down.

### Menu Planning Options

Meal Pattern:

Serving Period:

Age/Grade Group:

**Note:** All users should select the Healthy Hunger Free Kids Act (HHFKA) Food Based menu planning option for breakfast and lunch. Use the **Other** option *only* if you have been approved by your state agency to plan menus using alternate menu planning.

- Choose the serving period- breakfast or lunch.
- Select an age and grade grouping to establish the nutrient guidelines. All required nutrients will populate automatically.
- Enter in your optional nutrient standards, if they have been provided by your state agency.
 

**Note:** The Healthy Hunger Free Kids Act has established guidelines for specific nutrients (calories, sodium, and saturated fat) based on specific age and grade groups. They will appear in gray and cannot be modified.
- Click **Save**.

### Nutrient Standards

Calories - Min:	<input type="text" value="350"/>		Dietary Fiber:	<input type="text"/>	g*
Calories - Max:	<input type="text" value="500"/>		Protein:	<input type="text"/>	g*
Total Fat:	<input type="text"/>	% or less *	Iron:	<input type="text"/>	mg*
Saturated Fat:	<input type="text" value="10"/>	% (less than)	Calcium:	<input type="text"/>	mg*
Cholesterol:	<input type="text"/>	mg*	Vitamin A:	<input type="text"/>	IU*
Sodium:	<input type="text" value="540"/>	mg or less	Vitamin C:	<input type="text"/>	mg*
Carbohydrate:	<input type="text"/>	g*	Sugars:	<input type="text"/>	g*

## Breakfast

### Healthy Hunger-Free Kids Act (HHFKA) Breakfast Age/Grade Groups:

All HHFKA Breakfast groupings allowed after the start of the 2013-2014 school year:

- Grades K-5
- Grades 6-8
- Grades 9-12
- Grades K-12
- Grades K-8

## Lunch

### Healthy Hunger-Free Kids Act (HHFKA) Lunch Age/Grade Groups:

All HHFKA Lunch groupings allowed after the start of the 2012-2013 school year:

- Grades K-5
- Grades 6-8
- Grades 9-12
- Grades K-8

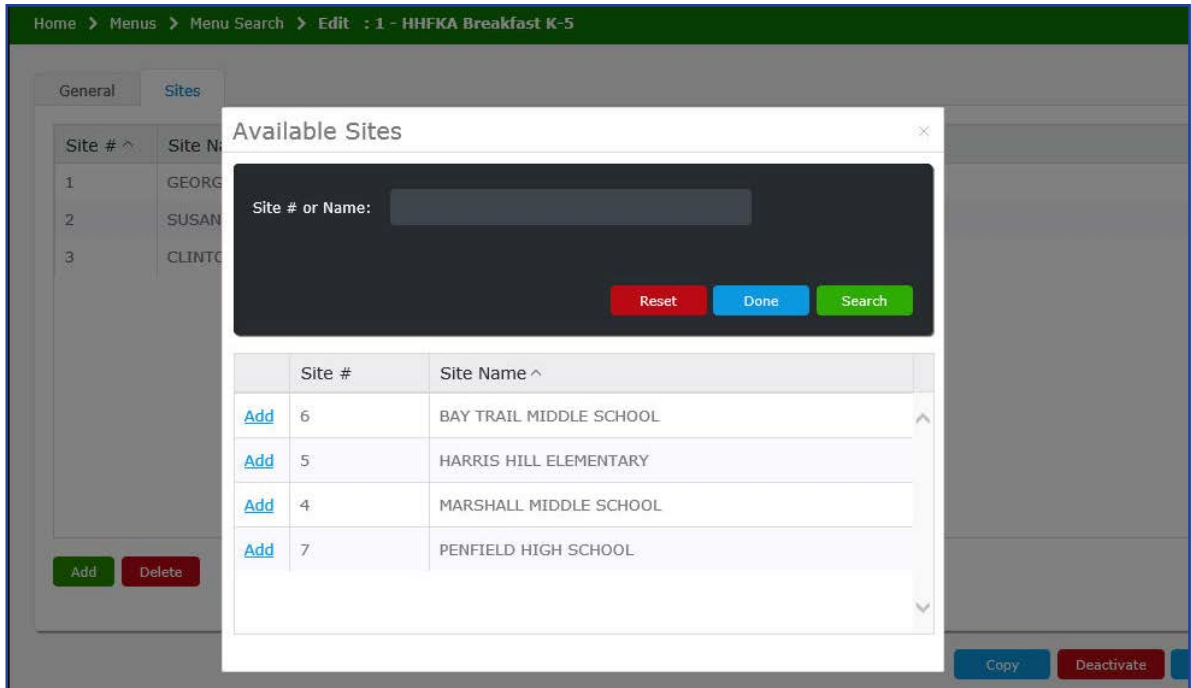
## Assigning Production Sites to Menus

The Site tab allows you to assign your production sites to the menus that they will be producing. This will then allow you to enter in Production Quantities for those locations. The Site(s) can be added at the time you are adding a new menu, or after the menu is created.

### Assigning Sites

1. Click **Menus**.
2. Click **Maintenance**.
3. Enter menu name to find a specific menu or leave the field blank for all menus.
4. Click **Search**.
5. Click **Setup** in the right-hand column to add sites to the selected menu.
6. Click **Sites** tab.

7. Enter a Site # or Name to find a specific Site or leave the field blank for all sites.
8. Click **Search**.
9. Click the **Add** hyperlink in the left-hand column next to all sites that you want to assign to this menu.
10. Click **Done** when all sites have been added to your menu.



11. Click **Save**.

## General Tab

### Planning Menus in Calendar Format

There is no limit as to how many recipes can be added to a menu. Perform the following procedure to create a menu from the calendar.

1. Click **Menus**.
2. Click **Maintenance**.
3. Enter a menu name to find a specific cycle menu or leave the field blank for all menus.
4. Click **Search**.
5. Click the **Menu#** hyperlink, or double-click the Menu Name of the menu you want to open.



# MENUS

- Use the calendar selector to select the desired month and year. To select a day, click the date selector once. To select a Month, click twice. To select a year, click three times.

The screenshot shows the 'General' tab of a menu management system. At the top, there are tabs for 'General', 'Recipes', 'Meal Totals', and 'Reports'. Below these, the 'Menu #' is 2, 'Menu Name' is 'Elementary Lunch-Traditional', 'Serving Period' is 'Lunch', and 'Age/Grade Group' is 'K-5 (age 5-10)'. A calendar selector is highlighted with a red circle, showing 'January, 2017'. Below the calendar are buttons for 'Import Cycle Menu', 'Copy', 'Delete', and 'Cancel'. To the right is a 'Preview' window.

Three expanded date selection windows are shown below the main interface:

- January 2017:** A calendar view for January 2017 with the date '2' highlighted in blue. The text 'Wednesday, January 18, 2017' is displayed at the bottom.
- 2017:** A year view for 2017 with 'Jan' highlighted in grey. The text 'Wednesday, January 18, 2017' is displayed at the bottom.
- 2010-2019:** A year range view from 2010 to 2019 with '2017' highlighted in grey. The text 'Wednesday, January 18, 2017' is displayed at the bottom.

- Double-click the Menu Day or click the Date on the menu in which you would like to work. Once you select a Menu Day or Date, you will be redirected to the Recipes tab.

## Recipes Tab

The Recipes tab allows you to add recipes to a menu, view the nutrients of the items in a menu, adjust quantities planned and served, and other functions.

To view a recipe on a selected menu, click the **Recipe #** link. This will open the Recipe page in a new tab. If a recipe is modified in the new tab, *you must refresh the previous Menu tab* before any changes will be visible on the menu.

General | **Recipes** | MealViewer | Meal Totals | Reports

Menu Date: Mon, 02/04/2019 View Type: Portion Size

Prev Day Next Day

Menu Name:

<sup>1</sup> -denotes required nutrient values.  
<sup>2</sup> -Trans Fat value is provided for informational purposes only, not for monitoring purposes.  
 \* denotes combined nutrient totals with either missing or incomplete nutrient data.  
 \*\*N/A\* denotes a nutrient that is missing or incomplete for an individual ingredient.

Recipe #	Description	Portion	Planned Reim-burse	Planned A La Carte	Cost	Calories <sup>1</sup> (kcal)	Saturated Fat <sup>1</sup> (g)	Saturated Fat CALS %	Sodium <sup>1</sup> (mg)	Sugars (g)
<a href="#">990010</a>	ALMOND CHICKEN PILAF	CUP	<input type="text" value="1"/>	<input type="text" value="0"/>	0.700	231	1.6	6.25%	252	1.5**
<a href="#">500114</a>	LASAGNA WITH GROUND BEEF	SERVINGS	<input type="text" value="1"/>	<input type="text" value="0"/>		269	4.7	15.69%	406	**N/A*
<a href="#">439</a>	PEAS & CARROTS: frozen,boiled	CUP	<input type="text" value="1"/>	<input type="text" value="0"/>		77	0.1	1.44%	109	7.0
<a href="#">86</a>	ORANGES	EACH	<input type="text" value="1"/>	<input type="text" value="0"/>		62	0.0	0.29%	0	12.2
<a href="#">900083</a>	MILK,Skim	HALF PINT	<input type="text" value="1"/>	<input type="text" value="0"/>		83	0.1	1.48%	103	12.5
<a href="#">900084</a>	MILK,Skim Flavored	HALF PINT	<input type="text" value="1"/>	<input type="text" value="0"/>		83	0.1	1.48%	103	12.5
					0.700	805	6.7	7.50%	972	45.7**

Add Replace Recipe Production Quantities Reim. Meal Groups Delete Meal Totals: 1 Cancel Save

### Add a Recipe to an Existing Menu

1. You may give the menu a name using the **Menu Name** field. If this is left blank, the menu name will default to the name of the meal session, such as "Breakfast" or "Lunch."
2. Click **Add**.

General | **Recipes** | MealViewer | Meal Totals | Reports

Menu Date: Mon, 02/04/2019 View Type: Portion Size

Prev Day Next Day

Menu Name:

<sup>1</sup> -denotes required nutrient values.  
<sup>2</sup> -Trans Fat value is provided for informational purposes only, not for monitoring purposes.  
 \* denotes combined nutrient totals with either missing or incomplete nutrient data.  
 \*\*N/A\* denotes a nutrient that is missing or incomplete for an individual ingredient.

Recipe #	Description	Portion	Planned Reim-burse	Planned A La Carte	Cost	Calories <sup>1</sup> (kcal)	Saturated Fat <sup>1</sup> (g)	Saturated Fat CALS %	Sodium <sup>1</sup> (mg)	Sugars (g)
<a href="#">990010</a>	ALMOND CHICKEN PILAF	CUP	<input type="text" value="1"/>	<input type="text" value="0"/>	0.700	231	1.6	6.25%	252	1.5**
<a href="#">500114</a>	LASAGNA WITH GROUND BEEF	SERVINGS	<input type="text" value="1"/>	<input type="text" value="0"/>		269	4.7	15.69%	406	**N/A*
<a href="#">439</a>	PEAS & CARROTS: frozen,boiled	CUP	<input type="text" value="1"/>	<input type="text" value="0"/>		77	0.1	1.44%	109	7.0
<a href="#">86</a>	ORANGES	EACH	<input type="text" value="1"/>	<input type="text" value="0"/>		62	0.0	0.29%	0	12.2
<a href="#">900083</a>	MILK,Skim	HALF PINT	<input type="text" value="1"/>	<input type="text" value="0"/>		83	0.1	1.48%	103	12.5
<a href="#">900084</a>	MILK,Skim Flavored	HALF PINT	<input type="text" value="1"/>	<input type="text" value="0"/>		83	0.1	1.48%	103	12.5
					0.700	805	6.7	7.50%	972	45.7**

Add Replace Recipe Production Quantities Reim. Meal Groups Delete Meal Totals: 1 Cancel Save

3. Enter in a Recipe # or a partial description of the recipe you want to add to the menu.  
**Note:** To narrow your search select a Group Code or Source from the appropriate drop-down.
4. Click **Search**.

# MENUS

- A list of all recipes that contain the entered text should be displayed in the grid. Click **Add** in the left-hand column to select the recipe. To select multiple recipes, search for and select each appropriate recipe by clicking **Add**. When you have selected all recipes for the menu, click **Done**.

Home > Menus > Menu Search > Edit : 2 - HHFKA Breakfast 6-8

### Recipe Search

Recipe # or Description:  Source:

Group Code:

	Recipe #	Description ^	Portion	Source	Code
<a href="#">Add</a>	500003	APPLESAUCE CAKE	SERVINGS	USDA C-03	DESRT
<a href="#">Add</a>	356	APPLESAUCE,SWEETENED	1 CUP		FRUIT
<a href="#">Add</a>	247	APPLESAUCE:cnnd,unswtnd,+vit C	CUP		FRUIT
<a href="#">Add</a>	248	APRICOTS: canned,light syrup	CUP		FRUIT
<a href="#">Add</a>	500004	ARROZ CON QUESO	SERVINGS	USDA D-48	ENT
<a href="#">Add</a>	250	ASPARAGUS: fresh,boiled	CUP		VEG
<a href="#">Add</a>	500305	AZTEC GRAIN SALAD	1 CUP	USDA B-24r	BREAD

General | **Recipes** | MealViewer | Meal Totals | Reports

Menu Date:  View Type:

Menu Name:

1 -denotes required nutrient values.  
2 -Trans Fat value is provided for informational purposes only, not for monitoring purposes.  
\* denotes combined nutrient totals with either missing or incomplete nutrient data.  
\*\*N/A\*\* denotes a nutrient that is missing or incomplete for an individual ingredient.

	Recipe #	Description	Portion	Planned Reim-burse	Planned A La Carte	Cost	Calories <sup>1</sup> (kcal)	Saturated Fat <sup>1</sup> (g)	Saturated Fat CALS %	Sodium <sup>1</sup> (mg)	Sugars (g)
1	<a href="#">990010</a>	ALMOND CHICKEN PILAF	CUP	<input type="text" value="1"/>	<input type="text" value="0"/>	0.700	231	1.6	6.25%	252	1.5*
2	<a href="#">500114</a>	LASAGNA WITH GROUND BEEF	SERVINGS	<input type="text" value="1"/>	<input type="text" value="0"/>		269	4.7	15.69%	406	**N/A**
3	<a href="#">439</a>	PEAS & CARROTS: frozen,boiled	CUP	<input type="text" value="1"/>	<input type="text" value="0"/>		77	0.1	1.44%	109	7.0
4	<a href="#">86</a>	ORANGES	EACH	<input type="text" value="1"/>	<input type="text" value="0"/>		62	0.0	0.29%	0	12.2
5	<a href="#">900083</a>	MILK,Skim	HALF PINT	<input type="text" value="1"/>	<input type="text" value="0"/>		83	0.1	1.48%	103	12.5
6	<a href="#">900084</a>	MILK,Skim Flavored	HALF PINT	<input type="text" value="1"/>	<input type="text" value="0"/>		83	0.1	1.48%	103	12.5
7	<a href="#">500001</a>	APPLE CRISP	SERVINGS	<input type="text" value="1"/>	<input type="text" value="0"/>	2.050	200	1.6	7.16%	113	**N/A**
						2.750	1005	8.3	7.43%	1085	45.7**

Meal Totals:

## Tip

The recipe list can be re-ordered by dragging and dropping the recipe to the desired location. Select a row by clicking on it. Click and hold the mouse button to drag the recipe to new location.

## Tip

To remove a single recipe, select the item and click **Delete**.

## Replace Recipe

The Replace Recipe button allows you to take a recipe from an existing menu plan and replace it with a different recipe. This can be useful for adjusting the nutritional makeup of menu items. Perform the following procedure to replace a recipe in a menu.

1. Click **Menus**.
2. Click **Maintenance**.
3. Enter a menu name to find a specific menu or leave the Menu Name field blank for all menus.
4. Click **Search**.
5. Click the **Menu#** hyperlink, or double-click the menu you want to open.
6. Select the month and year.
7. Double-click a menu day that has a menu already planned on it.
8. Select a menu item that you would like to replace.
9. Click **Replace Recipe**.

1	<a href="#">990010</a>	ALMOND CHICKEN PILAF	CUP	<input type="text" value="1"/>	<input type="text" value="0"/>	0.700	231	1.6	6.25%	252	1.5*
2	<a href="#">500114</a>	LASAGNA WITH GROUND BEEF	SERVINGS	<input type="text" value="1"/>	<input type="text" value="0"/>		269	4.7	15.69%	406	**N/A*
3	<a href="#">439</a>	PEAS & CARROTS: frozen,boiled	CUP	<input type="text" value="1"/>	<input type="text" value="0"/>		77	0.1	1.44%	109	7.0
4	<a href="#">86</a>	ORANGES	EACH	<input type="text" value="1"/>	<input type="text" value="0"/>		62	0.0	0.29%	0	12.2
5	<a href="#">900083</a>	MILK,Skim	HALF PINT	<input type="text" value="1"/>	<input type="text" value="0"/>		83	0.1	1.48%	103	12.5
6	<a href="#">900084</a>	MILK,Skim Flavored	HALF PINT	<input type="text" value="1"/>	<input type="text" value="0"/>		83	0.1	1.48%	103	12.5
7	<a href="#">500001</a>	APPLE CRISP	SERVINGS	<input type="text" value="1"/>	<input type="text" value="0"/>	2.050	200	1.6	7.16%	113	**N/A*
						2.750	1005	8.3	7.43%	1085	45.7**

Meal Totals:

10. Search for a replacement recipe using the search fields.  
Click **Reset** to begin a new search. Click **Done** to return to the Recipes tab without making a replacement.
11. Click **Replace** next to the menu item that you would like to use to replace the previously selected recipe.  
The new menu item will automatically replace the old one.

### Replace Recipe Search

Recipe # or Description:   Source:

Group Code:

	Recipe #	Description	Portion	Cost	Calories <sup>1</sup> (kcal)	Satu Fat <sup>1</sup> (g)
<b>Current Recipe</b>	64	APPLES,Fresh	EACH		55	0.0
<a href="#">Replace</a>	500136	ORANGE GLAZED SWEET POTATOES	1/4 CUP		115	0.5
<a href="#">Replace</a>	500139	ORANGE-PINEAPPLE GELATIN	SERVINGS		91	0.0
<a href="#">Replace</a>	900023	ORANGES	EACH		45	0.0
<a href="#">Replace</a>	86	ORANGES	EACH		62	0.0

## View Type

### Average Daily Nutrient Values

All recipes served under a reimbursable meal will be averaged over a school week consisting of a minimum of three days and a maximum of seven days. However, you can still view the daily average nutrient value. This value will be calculated using the reimbursable values that are entered for each menu item on the day's menu.

### Portion Size vs Weighted Nutrient Values

You can choose to display the nutrient values for the recipes by portion size or weighted nutrient values; however, the daily average nutrient values will be the same.

Portion size lists the nutrient values per serving of each recipe based on the portion size.

The Weighted Nutrient Values option displays each recipe's nutrient values based on the popularity (the number of students selecting it).

In this example, the more popular item is Toasted Cheese Sandwich, and therefore it contributes more to the average nutrient values than the less popular entrées Ham Sandwich and Turkey W/Cheese Sandwich. The nutrient values of the Toasted Cheese Sandwich are given more weight towards the average nutrient values.

General Recipes MealViewer Meal Totals Reports

Menu Date: Mon, 02/04/2019 View Type: Portion Size

Prev Day Next Day

Menu Name:

1 denotes required nutrient values.  
 2 -Trans Fat value is provided for informational purposes only, not for monitoring purposes.  
 \* denotes combined nutrient totals with either missing or incomplete nutrient data.  
 \*N/A\* denotes a nutrient that is missing or incomplete for an individual ingredient.

Recipe #	Description	Portion	Planned Reim-burse	Planned A La Carte	Cost	Calories <sup>1</sup> (kcal)	Saturated Fat <sup>1</sup> (g)	Saturated Fat CALS %	Sodium <sup>1</sup> (mg)	Sugars (g)
1	990010 ALMOND CHICKEN PILAF	CUP	1	0	0.700	231	1.6	6.25%	252	1.5*
2	500114 LASAGNA WITH GROUND BEEF	SERVINGS	1	0		269	4.7	15.69%	406	*N/A*
3	439 PEAS & CARROTS: frozen,boiled	CUP	1	0		77	0.1	1.44%	109	7.0
4	86 ORANGES	EACH	1	0		62	0.0	0.29%	0	12.2
5	900083 MILK,Skim	HALF PINT	1	0		83	0.1	1.48%	103	12.5
6	900084 MILK,Skim Flavored	HALF PINT	1	0		83	0.1	1.48%	103	12.5
7	500001 APPLE CRISP	SERVINGS	1	0	2.050	200	1.6	7.16%	113	*N/A*
					2.750	1005	8.3	7.43%	1085	45.7*

Add Replace Recipe Production Quantities Reim. Meal Groups Delete Meal Totals: 1 Cancel Save

## Meal Totals and Planned Quantities

It is necessary to forecast the number of servings for each recipe and condiment. On this screen you will be working with Planned values. These are the quantities that you plan on serving. (If you want to work with Offered and Served values you will need to enter them into the Production Quantities screen and print them using the Menu Spreadsheet).

When adding these values you will be establishing how many of those items are being taken as part of a reimbursable meal. This is called weighting your menu. When a menu is weighted, the popular recipes will provide a larger proportion of the nutrients for that meal. To obtain accurate numbers for your planned weighted menus, we recommend using the planned quantities from previous production records.

### Meal Totals

Following the recipe selection, enter meal total for nutrient analysis purposes.

1. Type the total number of students selecting a reimbursable meal in the Meal Totals field at the bottom of the screen.
2. For each recipe, enter the planned reimbursable meal counts into the Planned Reimburse column.
3. Enter in any a la carte meals that you plan to sell on this day into the A la Carte column.

**Note:** A la carte items are not calculated into the nutrient analysis.

4. When finished, click **Save**.

General | **Recipes** | MealViewer | Meal Totals | Reports

Menu Date: Mon, 02/04/2019 View Type: Portion Size

Prev Day Next Day

Menu Name:

<sup>1</sup> -denotes required nutrient values.  
<sup>2</sup> -Trans Fat value is provided for informational purposes only, not for monitoring purposes.  
 \* denotes combined nutrient totals with either missing or incomplete nutrient data.  
 \*\*N/A\*\* denotes a nutrient that is missing or incomplete for an individual ingredient.

Recipe #	Description	Portion	Planned Reimburse	Planned A La Carte	Cost	Calories <sup>1</sup> (kcal)	Saturated Fat <sup>1</sup> (g)	Saturated Fat CALS %	Sodium <sup>1</sup> (mg)	Sugars (g)
1	990010 ALMOND CHICKEN PILAF	CUP	<input type="text" value="1"/>	<input type="text" value="0"/>	0.700	231	1.6	6.25%	252	1.5**
2	500114 LASAGNA WITH GROUND BEEF	SERVINGS	<input type="text" value="1"/>	<input type="text" value="0"/>		269	4.7	15.69%	406	**N/A**
3	439 PEAS & CARROTS: frozen,boiled	CUP	<input type="text" value="1"/>	<input type="text" value="0"/>		77	0.1	1.44%	109	7.0
4	86 ORANGES	EACH	<input type="text" value="1"/>	<input type="text" value="0"/>		62	0.0	0.29%	0	12.2
5	900083 MILK,Skim	HALF PINT	<input type="text" value="1"/>	<input type="text" value="0"/>		83	0.1	1.48%	103	12.5
6	900084 MILK,Skim Flavored	HALF PINT	<input type="text" value="1"/>	<input type="text" value="0"/>		83	0.1	1.48%	103	12.5
7	500001 APPLE CRISP	SERVINGS	<input type="text" value="1"/>	<input type="text" value="0"/>	2.050	200	1.6	7.16%	113	**N/A**
					2.750	1005	8.3	7.43%	1085	45.7**

Meal Totals:

Add Replace Recipe Production Quantities Reim. Meal Groups Delete Cancel Save

## Viewing Reimbursable Meal Groups

When planning menus, you can use the Reimbursable Meal Groups page to define your reimbursable meals by component to ensure they meet the daily meal pattern requirements. The page can also be used to check already present items to make sure they are eligible for reimbursable meal classification. To access the Reimbursable Meal Groups page, click **Reim. Meal Groups**.

7	500001 APPLE CRISP	SERVINGS	<input type="text" value="1"/>	<input type="text" value="0"/>
---	--------------------	----------	--------------------------------	--------------------------------

Add Replace Recipe Production Quantities Reim. Meal Groups Delete



# MENUS

On the Reimbursable Meal Groups page, reimbursable meals defined within the Recipes tab are listed under Defined Reimbursable Meals, and meal component requirements are listed under Daily Meal Pattern Requirements and Milk Offered Requirements. For more information on reimbursable meals and how to use this page, see the Certification of Compliance section of this guide.

Menu Name: Elementary Lunch-Traditional      Monday, September 3, 2018      Prev Day Next Day

**Defined Reimbursable Meals**

Meal Name	
<a href="#">Hamburger and Side Salad</a>	✔
<a href="#">Lasagna and Green Beans</a>	❗

**Daily Meal Pattern Requirements**

Component	Required Min	Actual Min	
Meat/Meat Alt	1.000 oz eq	2.000	✔
Grain	1.000 oz eq	0.750	❗
Fruit	0.500 cup	0.500	✔
Vegetable	0.750 cup	1.000	✔
Milk	1.000 cup	1.000	✔

**Milk Offered Requirements**

Component		
Skim/Fat Free/Unflavored	<input checked="" type="checkbox"/>	✔
Skim/Fat Free/Flavored	<input checked="" type="checkbox"/>	✔
Low-Fat(1% or less)/Unflavored	<input type="checkbox"/>	✔
Low-Fat(1% or less)/Flavored	<input type="checkbox"/>	✔
Reduced-Fat(2% or whole)	<input type="checkbox"/>	✔

## Entering Production Quantities

Perform the following procedure to enter production quantities.

1. Click **Menus**.
2. Click **Maintenance**.
3. Enter a menu name to find a specific menu or leave the Menu Name field blank for all menus.
4. Click **Search**.
5. Click the **Menu#** hyperlink, or double-click the menu you want to open.
6. Select the month and year.
7. Double-click a menu day that has a menu already planned on it.
8. Click the **Recipes** tab.
9. Click the **Production Quantities** button in the lower left-hand corner to add your numbers for the day (the user can enter Planned, Offered, and Served values).

7	<a href="#">500001</a>	APPLE CRISP	SERVINGS	1	0	2.050
						2.750
<span>Add</span> <span>Replace Recipe</span> <span style="border: 2px solid red; padding: 2px;">Production Quantities</span> <span>Reim. Meal Groups</span> <span>Delete</span>						

# MENUS

10. Select the desired site from the drop-down in the upper left-hand corner, and enter your counts. If you do not see the desired site, refer to the **Assigning Production Sites to Menu** topic.
11. Enter production count. Click in the field and then type the appropriate count. For each menu item, enter the corresponding reimbursable and a la carte production counts.
 

**Note:** Reimbursable Meal Totals are required when adding Planned, Offered, and Served reimbursable meal counts.
12. To enter a temperature, click the **plus sign** icon in the Temp (°F) column. Enter the temperature, then select the Service Type, Status, and a Description from the drop-down menus.
13. Enter any additional information you would like to appear on a Production Record for a menu item in the **Comment** column.
14. Click **Save**.
15. When finished, click **Cancel**.

**Note:** Depending on your user permissions, you may be restricted from entering or editing the Planned and Offered amounts. If this needs to be changed, you will need to edit that permission in Security Groups on the Setup tab.

Home > Menus > Menu Search > Edit : 2 - Elementary Lunch-Traditional

Site: Adams Elementary Wednesday, June 24, 2020 Prev Day Next Day

Recipe Name	Portion	Planned		Offered		Served				Temp (°F)	Comment	
		Reim-burse	A La Carte	Reim-burse	A La Carte	Reim-burse	A La Carte	Short Leftover	Waste			
<b>Meal To...</b>		100	0	100	0	0	0	0	0	0		
HAMBUR...	<a href="#">PQ_History</a> SERVING	0	0	0	0	0	0	0	0	0	+	
LASAGN...	<a href="#">PQ_History</a> SERVINGS	0	0	0	0	0	0	0	0	0	+	
Chicken ...	<a href="#">PQ_History</a> Each	0	0	0	0	0	0	0	0	0	+	
CAJUN S...	<a href="#">PQ_History</a> 3/4 CUP	90	0	90	0	0	0	0	0	0	+	
HOT DO...	<a href="#">PQ_History</a> SERVING	0	0	0	0	0	0	0	0	0	+	
SPANISH...	<a href="#">PQ_History</a> CUP	0	0	0	0	0	0	0	0	0	+	
TACO PI...	<a href="#">PQ_History</a> SERVINGS	0	0	0	0	0	0	0	0	0	+	
CHICKEN...	<a href="#">PQ_History</a> Serving (5...	0	0	0	0	0	0	0	0	0	+	
SALAD,S...	<a href="#">PQ_History</a> CUP	10	0	10	0	0	0	0	0	0	+	
SALAD,T...	<a href="#">PQ_History</a> CUP	10	0	10	0	0	0	0	0	0	+	
CREAMY ...	<a href="#">PQ_History</a> 1/4 CUP	10	0	10	0	0	0	0	0	0	+	

Add Leftovers Delete Leftovers Copy Base Copy Planned Copy Offered Over/Short Sync SmartSense Clear Cancel Save



## Production Quantity Buttons

The Production Quantity button allows you to enter Planned, Offered, and Served values.

Menu Option	Description
Clear	Removes all values within the planned, offered, and served columns.
Cancel	Cancels out any changes that have been made, provided Save has not yet been clicked.
Save	Saves all entered data.
Prev Day	Precedes to the previous calendar menu day.
Next Day	Proceeds to the next calendar menu day.
Copy Base	Copies the numbers from the base menu into the Planned columns of the current menu plan.
Copy Planned	Copies the numbers from the Planned columns into the Offered columns.
Copy Offered	Copies the numbers from the Offered columns into the Served columns.
Over/Short	Takes the numbers from the Offered columns, compares them to the Served columns, and calculates the amount left over (if positive) or short (if negative) in the Short Leftover column.

## Production Count History

The Production Count History function allows you to see previous production quantities for recipes on a menu. This can help in predicting planning numbers and making adjustments when needed.

To see a recipe’s production count history, click the **PQ History** link next to the desired recipe name.

# MENUS

The Production Count History will appear as a pop-up over your current Production Quantities screen. This allows you to see currently entered production quantities and compare them to the previous quantities. You can adjust the size of the Production Count History pop-up as well to allow greater visibility of the history list or the current quantities.

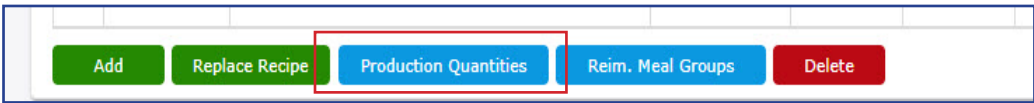
While viewing the Production Count History pop-up, you are still able to edit production quantities. This allows you to use the previous quantities as a direct reference without having to switch back and forth between screens. Clicking the **PQ History** link for a new recipe will replace the pop-up but keep the same dimensions and position as you had for the previous pop-up. When you are finished viewing the Production Count History, click the **X** in the upper-right corner to close the pop-up.

Production Count History										
Vegetable Juice .50 CUP										
Date	Planned		Offered		Served				Temp (°F)	Comment
	Reim-burse	A La Carte	Reim-burse	A La Carte	Reim-burse	A La Carte	Short Leftover	Waste		
11/9/2015	1	0	1	0	1	0	0	0		
11/6/2015	1	0	1	0	1	0	0	0		
11/5/2015	1	0	1	0	1	0	0	0		
11/4/2015	1	0	1	0	1	0	0	0		
11/3/2015	1	0	1	0	1	0	0	0		
11/2/2015	1	0	1	0	1	0	0	0		

## Adding Leftovers

Mosaic allows you to add in leftovers from a previously served meal. This function helps use up previous menu items to cut down on costs and labor. Perform the following steps to add leftovers to your menus.

1. Click **Menus**.
2. Click **Maintenance**.
3. Enter a menu name to find a specific menu or leave the Menu Name field blank for all menus.
4. Click **Search**.
5. Click the **Menu#** hyperlink, or double-click the menu you want to open.
6. Select the month and year.
7. Double-click a menu day that has a menu already planned on it.
8. Click the **Recipes** tab.
9. Click the **Production Quantities** button in the lower left-hand corner.



10. Click the **Add Leftovers** button in the lower left-hand corner.

ROLLS, DINNER, WHOLE WH...	Each 1 oz	150	
HAM & CHEESE SANDWICH	EACH	250	

11. Search for a recipe by recipe number, description, group code, or source, or just click **Search** to show an unfiltered list.

12. Click **Add** next to the recipe you would like to add as leftovers.

### Recipe Search

Recipe # or Description:  Source:

Group Code:

\* Only the first 200 items shown \*

	Recipe #	Description ^	Portion	Source	Code
<a href="#">Add</a>	990006	ALMOND BROCCOLI SALAD W/TURKEY	60 (1/2 CUP)	ALMOND B...	ENT
<a href="#">Add</a>	133	ALMONDS	1 oz	TEST	SN
<a href="#">Add</a>	6	APPLE COBBLER	50 SERVINGS	C-01	DESRT

13. Select the date when the recipe was originally prepared.

14. Click **Yes**.

**Warning** !

Recipe 990006 ALMOND BROCCOLI SALAD W/TURKEY

Select the date these leftovers originated from:

Do you wish to continue?

15. Repeat steps 11-14 to add more leftover recipes.

16. After adding all the recipes that are used as leftovers, click **Done**.

Recipe # or Description:  Source:

Group Code:

\* Only the first 200 items shown \*

- The new leftover item will appear at the bottom of the recipe lists in Production Quantities. In addition, the Recipe Name will include the date of the leftover's original preparation. Enter the production information for the leftovers.
- Click **Save**.

Site: T Jefferson Elementary Monday, March 6, 2017 Prev Day Next Day

Recipe Name	Portion	Planned		Offered		Reimburse		Short Leftover	Serve
		Reimburse	A La Carte	Reimburse	A La Carte	Reimburse	A La Carte		
<b>Meal Totals</b>		275	0	0	0	0	0	0	
LASAGNA W/ GRND PORK & BEEF	SERVINGS	275	0	0	0	0	0	0	
ROLLS, DINNER,WHOLE WHEAT:1 oz	Each 1 oz	150	0	0	0	0	0	0	
HAM & CHEESE SANDWICH	EACH	250	50	0	0	0	0	0	
BROCCOLI: fresh, steamed	CUP	60	0	0	0	0	0	0	
PEACH CRISP:Test	SERVINGS	50	0	0	0	0	0	0	
MILK, Non Fat Chocolate	HALF PINT	80	0	0	0	0	0	0	
MILK,1% Lowfat	HALF PINT	80	0	0	0	0	0	0	
MUSTARD: individual PC	Pkt 5g	15	0	0	0	0	0	0	
ALMOND BROCCOLI SALAD W/TURKEY (leftover from 3/5/2017)	1/2 CUP	0	0	0	0	0	0	0	

Add Leftovers Delete Leftovers Copy Base Copy Planned Copy Offered Clear Cancel Save

## Deleting Leftovers

- Click **Menus**.
- Click **Maintenance**.
- Enter a menu name to find a specific menu or leave the Menu Name field blank for all menus.
- Click **Search**.
- Click the **Menu#** hyperlink, or double-click the menu you want to open.
- Select the month and year.
- Double-click a menu day that has a menu already planned on it.
- Click the **Recipes** tab.
- Click the **Production Quantities** button in the lower left-hand corner.
- Select the leftover item from the recipe list. Leftovers are automatically placed at the bottom of the list.
- Click **Delete Leftovers**.

PEACH CRISP:Test	SERVINGS	50	0	0	
MILK, Non Fat Chocolate	HALF PINT	80	0	0	
MILK,1% Lowfat	HALF PINT	80	0	0	
MUSTARD: individual PC	Pkt 5g	15	0	0	
ALMOND BROCCOLI SALAD W/TURKEY (leftover from 3/5/2017)	1/2 CUP	0	0	0	

Add Leftovers Delete Leftovers Copy Base Copy Planned Copy Offered

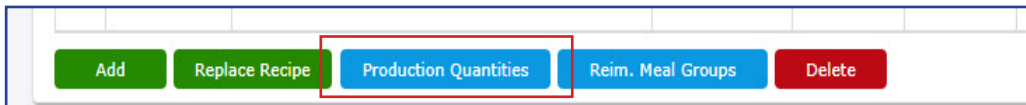
12. Click **Yes** to delete the leftover item.



## Synchronizing Menu Data with SmartSense

If you have enabled integration with SmartSense, you sync up menus with SmartSense by using the Sync SmartSense button on the Production Quantities page. This allows you to upload menu data from Mosaic to SmartSense as well as download temperature data back to Mosaic. To use this feature, perform the following steps.

1. Click **Menus**.
2. Click **Maintenance**.
3. Enter a menu name to find a specific menu or leave the Menu Name field blank for all menus.
4. Click **Search**.
5. Click the **Menu#** hyperlink, or double-click the menu you want to open.
6. Select the month and year.
7. Double-click a menu day that has a menu already planned on it.
8. Click the **Production Quantities** button in the lower left-hand corner.



9. Select the desired site from the drop-down in the upper left-hand corner.
10. Click **Sync SmartSense**. This will sync the menu information with the SmartSense website.

The screenshot shows the Production Quantities page for "T Jefferson Elementary" on "Wednesday, August 21, 2019". The page includes a table with the following columns: Recipe Name, Portion, Planned (Reim-burse, A La Carte), Offered (Reim-burse, A La Carte), Served (Reim-burse, A La Carte, Short Leftover, Waste), Temp (°F), and Comment. The "Meal Totals" row shows 600 planned and 600 offered. Below the table, there are buttons for "Add Leftovers", "Delete Leftovers", "Copy Base", "Copy Planned", "Copy Offered", "Over/Short", "Sync SmartSense" (highlighted with a red box), "Clear", "Cancel", and "Save".

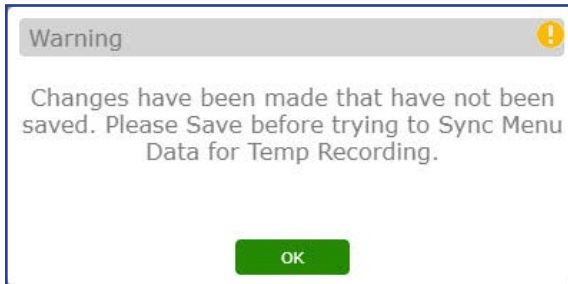
Recipe Name	Portion	Planned		Offered		Served				Temp (°F)	Comment	
		Reim-burse	A La Carte	Reim-burse	A La Carte	Reim-burse	A La Carte	Short Leftover	Waste			
<b>Meal Totals</b>		600	0	600	0	0	0	0	0	0		
HAMBURGER ON A BUN:WW	SERVING	0	0	0	0	0	0	0	0	0	+	
LASAGNA WITH GROUND BEEF	SERVINGS	0	0	0	0	0	0	0	0	0	+	
Chicken Patty On Bun	Each	600	0	600	0	0	0	0	0	0	+	
CAJUN SAUSAGE/TURKEY JA...	3/4 CUP	0	0	0	0	0	0	0	0	0	+	
HOT DOG ON A BUN:turkey h...	SERVING	0	0	0	0	0	0	0	0	0	+	

## Notes for SmartSense Sync

Only menus for today's date or for a future date may be uploaded to SmartSense. SmartSense will not display past menus.

If a site is in a SmartSense-enabled district but the API key is not entered, the Sync SmartSense feature will be disabled and show an error if the user attempts to click it. Enter the API key on the SmartSense page under Setup to enable this option.

An upload cannot be completed if the menu is not saved.



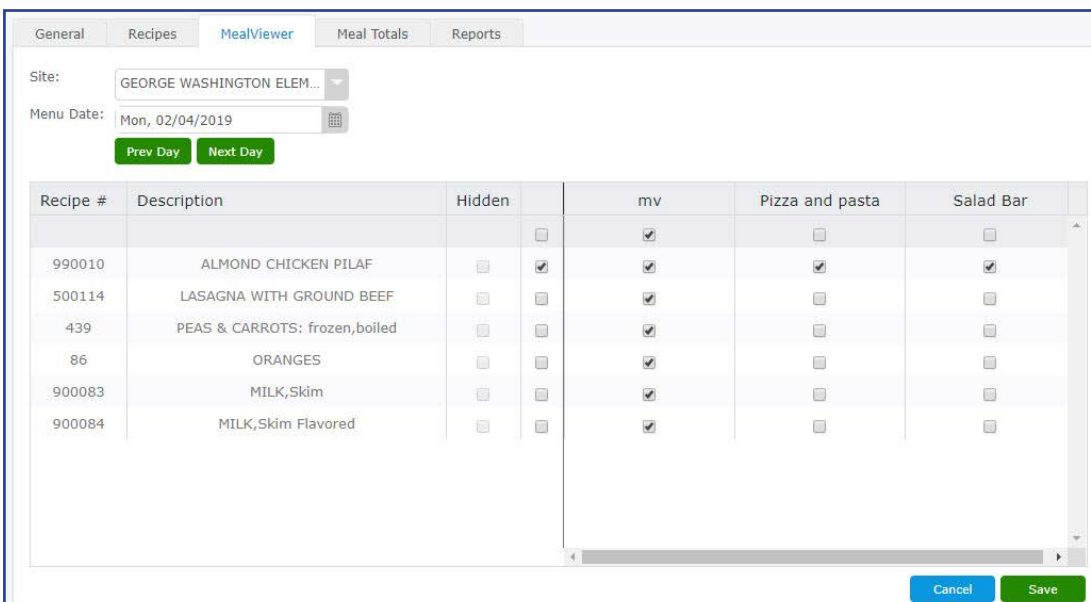
## MealViewer Tab

**Note:** The MealViewer tab is only available to districts who have MealViewer enabled in Mosaic. To see if your district is MealViewer enabled, see the District page on the Setup tab.

The MealViewer tab lets you select Display Groups that will be used by MealViewer when displaying Mosaic menus. First, use the Site and Menu Date fields to select the correct menu. The recipes on the menu appear in a list, and Display Groups are listed to the right of the recipes. Check the box for each Display Group that applies to the listed recipe. You may use the checkboxes in the left columns to check off every Display Group for a single menu item, and you may use the top checkboxes to select every menu item for a single Display Group. Click the checkbox in the top left to select all Display Groups for all menu items. Unselected items remain hidden.

After selecting the MealViewer Display Groups, click **Save**.

**Note:** For more information on setting up Display Groups, see the MealViewer Display Groups page on the Setup tab.



## Meal Totals Tab

The Meal Totals tab allows you to view the planned, offered, and served quantities, reimbursable and a la carte, for a selected menu, date, and site.

**Note:** You may also access Production Quantities from this screen. For details about Production Quantities, refer to the Recipes tab of this section.

Site #	Site Name	Planned Reimbursable	Planned A La Carte	Offered Reimbursable	Offered A La Carte	Served Reimbursable	Served A La Carte
5	Adams Elementary	200	0	200	0	0	0
1	T Jefferson Elementary	450	5	450	5	0	0
8	Hamilton Elementary	500	0	500	0	0	0
7	Lincoln Elementary	700	0	700	0	0	0

Thursday, 7/7/2016  
[Prev Day](#) [Next Day](#)

[Production Quantities](#)



## Reports Tab

### Nutrient Breakdown Summary Report

The Nutrient Breakdown Summary Report compares the average nutrients that have been entered on a menu to the target values on that menu (Base values). If one, two, or more than seven days are selected for the date range, the % Target, Shortfall, and Overage columns will be blank.

1. In the Reports tab, select the **Start date** and **End date** for the report you would like to generate.
2. From the Report Type drop-down, select **Summary**.
3. From the Display Type drop-down, select **PDF** or **Report Viewer**.
4. Click **Display Report**.

Nutrient Breakdown Summary Report							
From Mar 1, 2015 to Mar 7, 2015							
1 - HHFKA Breakfast K-5 (age 5-10)							
Nutrient	Average	% of Cals	Weekly Target	% of Target <sup>1</sup>	Shortfall <sup>1</sup>	Overage <sup>1</sup>	Missing Data
Calories	298.00		350-500	85%	52.00		
Saturated Fat	2.96 g	8.9%	<10.000%				
Sodium	97.00 mg		540	18%			
Sugars	0.00 g		15.00	0%			*
Total Fat	12.05 g	36.4%	<=30.000%			6.40%	
Trans Fat	*N/A*						
Cholesterol	0.00 mg		400	0%			
Carbohydrate	47.46 g	63.7%	20.00	237%		27.46	
Fiber	3.49 g		20.00	17%	16.51		
Protein	2.48 g	3.3%	60.00	4%	57.52		
Vitamin A	52.00 IU		1500	3%	1448.00		
Calcium	12.60 mg		50.00	25%	37.40		
Vitamin C	0.21 mg		20.00	1%	19.79		
Iron	1.26 mg		20.00	6%	18.74		

<sup>1</sup> - Data comparisons are not available for date ranges outside of a valid menu week.

**\*N/A\*** - denotes a nutrient that is either missing or incomplete for an individual ingredient  
**\*** - denotes combined nutrient totals with either missing or incomplete nutrient data

**NOTICE:** The data contained within this report and the MOSAIC® Menu Planning and Nutritional Analysis software should not be used for and does not provide menu planning for a child with a medical condition or food allergy. Ingredients and menu items are subject to change or substitution without notice. Please consult a medical professional for assistance in planning for or treating medical conditions.



## Nutrient Breakdown Quick View with Costing

The Nutrient Breakdown Quick View with Costing gives a summarized overview of weekly nutrient values for Calories, saturated fat, and sodium. This nutritional information is paired with the cost for each day. This allows for fast comparisons between target nutrient/cost numbers and actual nutrient/cost numbers.

1. In the Reports tab, select the **Start date** and **End date** for the report you would like to generate.
2. From the Report Type drop-down, select **Quick View with Costing**.
3. From the Display Type drop-down, select **PDF** or **Report Viewer**.
4. Click **Display Report**.

<b>MOSAIC</b>						
Nutrient Breakdown Plus Cost Quick View						
From Jul 13, 2015 to Jul 16, 2015						
2 - HHFKA Lunch K-5 (age 5-10)						
	Mon 07/13	Tue 07/14	Wed 07/15	Thu 07/16	Weekly Average	Weekly Target
Calories	449	717	566	674	602	550-650
Sat Fat	5.68 g	6.71 g	5.71 g	4.84 g	5.73 g	
Sat Fat %	11.35%	8.42%	9.08%	6.46%	8.57%	<10.000%
Sodium	565 mg	840 mg	860 mg	1170 mg	859 mg	1230 mg
Cost	\$0.026	\$0	\$0	\$0	\$0.006	

\*N/A\* - denotes a nutrient that is either missing or incomplete for an individual ingredient  
 \* - denotes combined nutrient totals with either missing or incomplete nutrient data

**NOTICE:** The data contained within this report and the MOSAIC® Menu Planning and Nutritional Analysis software should not be used for and does not provide menu planning for a child with a medical condition or food allergy. Ingredients and menu items are subject to change or substitution without notice. Please consult a medical professional for assistance in planning for or treating medical conditions.

## Production Plan Report

The Production Plan Report lists the recipe name and number per day with portion size. It also provides:

- Planned quantities for each of the menu items (reimbursable and a la carte).
- The combined total quantity to prepare.
- The recipe source and any recipe details for the recipe.

Perform the following procedure to generate a Production Plan Report.

1. In the Reports tab, select the **Start date** and **End date** for the report you would like to generate.
2. From the Report Type drop-down, select **Base**, **Offered**, or **Planned**.
3. Select the appropriate site from the Site drop-down.
4. From the Display Type drop-down, select **PDF** or **Report Viewer**.
5. Click **Display Report**.

Production Plan						
10 - HHFKA Breakfast K-5 (age 5-10)						
Tuesday      08/05/2014      Reimbursable Meal Total ==>> 1						
No.	Name	Portion Size	Reim- burse	Ala Carte	Total	Recipe Source
000064	APPLES,Fresh	EACH	1	0	1	
000063	APPLE JUICE:cnnd,unswtn,+vit C	4 fl.oz.	1	0	1	
001081	BAGEL CINNAMON RAISIN:Secondar	EACH	1	0	1	
500011	BANANA BREAD SQUARES	SERVING	1	0	1	USDA B-05

## Weekly Requirements Report

The Weekly Requirements Report lists the weekly nutritional requirements for meals and compares them to the nutritional information in the food offered in the selected meal. This information is organized in a chart that is color-coded for your convenience.

The Weekly Rqmt. Check column provides a simple check to see if the food being offered in the menu meets nutritional requirements. If a nutrient requirement, such as Fruit, is satisfied, the entry will be green with the word Yes. If a nutrient requirement is not satisfied, the entry will be red with the word NO. This way, it is easy to tell at a glance if your menu meets nutrient requirements.

If any of the nutrient components are not satisfied, use the detailed information to see what changes are needed to align your menu with national standards.

Heartland School Solutions Weekly Certification Worksheet															
Elementary Lunch-Traditional						Lunch K-5 (age 5-10)						Week of 4/10/2017			
5 Day Week	Mon 04/10/17	Tue 04/11/17	Wed 04/12/17	Thu 04/13/17	Fri 04/14/17			Weekly Total	Weekly Rqmt.	Weekly Rqmt. Check	Weekly Fruit Juice Limit Check (no more than half of Total Fruit)	Total Weekly Fruit	Total Weekly Fruit Juice	% of Total Weekly Fruit that is Juice	Weekly Rqmt. Check
Fruit: Minimum (cups)								0	2.5	NO	Weekly Veg. Juice Limit Check (no more than half of Total Veg.)	0	0	0%	Yes
Vegetables: Minimum (cups)								0	3.75	NO		Total Weekly Veg.	Total Weekly Veg. Juice	% of Total Weekly Veg. that is Juice	Weekly Rqmt. Check
-Dark Green								0	0.5	NO		0	0	0%	Yes
-Red/Orange								0	0.75	NO					
-Beans & Peas (Legumes)								0	0.5	NO					
-Starchy								0	0.5	NO					
-Other								0	0.5	NO					
Meat/Meat Alt: Minimum (oz eq)								0	8	NO					
Meat/Meat Alt: Maximum (oz eq)								0	10	Yes					
Grain: Minimum (oz eq)								0	8	NO					
Grain: Maximum (oz eq)								0	9	Yes					
Grain Based Dessert Total for all weekly 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%			100% Whole Grain Rich	NO					
	Mon 04/10/17	Tue 04/11/17	Wed 04/12/17	Thu 04/13/17	Fri 04/14/17			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	Yes	Yes	Yes	Yes	Yes										
Low-fat(1% or less), flavored															
Reduced fat(2%) or whole, unflavored and flavored															

**\*\* Cells with this background color signify Requirements not being met!**

If you have the appropriate waiver from your State Agency, then the menu must be at least 50% whole grain-rich or 1% flavored milk is an acceptable variety.

## Copying Menus

Copying menus allows you to reuse existing menus for future dates.

1. After selecting a menu on the *General* tab within the menu, click **Copy**.
2. You may use the drop-down menu to select a different menu name in which you would like to copy.
3. If you would like to copy a range of dates that excludes weekends, set "Skip Sat & Sun" to **Yes**.
4. Use the **Copy Type** to select if you would like to *Append* or *Overwrite*. Selecting **Append** will add the copied selection on top of any pre-existing menu items for the selected day. Selecting **Overwrite** will replace any pre-existing menu items with the menu items that have been copied.

# MENUS

- From the left-hand calendar, select the correct month and year you want to copy from. Use the right and left arrows to navigate.
- From the right-hand calendar, select the correct month and year you want to copy to. Use the right and left arrows to navigate. A menu preview displays under the calendar you're copying from.
- To copy a single day's menu, you have two options:  
**Option 1:** Click the menu name ("Lunch", for example) on the calendar on the left and drag that day's menu to the desired date on the calendar on the right.  
**Option 2:** Highlight the day you wish to copy on the left, click the date where you are copying on the right, and click **Copy Selection** to copy that menu to the date you have selected.

To copy a date range of menus:

- Option 1:** Select the range of menus you need to copy. To do this, highlight the date of the first day being copied, hold down the **Shift** key, and click the last date being copied on the menu. Your range of menus will be highlighted in blue.
- Option 2:** Select the starting date for your copied menus by clicking the date on the calendar on the right (the starting date will be highlighted in blue).
- Option 3:** Click **Copy Selection** to paste the copied menus to the new dates.

When copying menus, by default, all of the data, including planned totals, will be included. To only copy base numbers when copying a menu, click the **Copy Menus Only** drop-down menu and select **Yes**.

- To delete a menu from a day, click on the **x** to the right of the menu name on the calendar day you copied to. A confirmation prompts displays, click **Yes** or **No**.
- Repeat steps 6 and 7 until all days have been copied.
- When finished, click **Done**.

Elementary Lunch-Traditional Drag items from left to right »

Skip Sat & Sun: No Copy Menus Only: No Copy Type: Append

Today < > October, 2018

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
30	01 Lunch	02 Lunch	03 Lunch	04 Lunch	05 Lunch	06
07	08 Lunch	09 Lunch	10 Lunch	11 Lunch	12 Lunch	13
14	15 Lunch	16 Lunch	17 Lunch	18 Lunch	19 Lunch	20
21	22 Lunch	23 Lunch	24 Lunch	25 Lunch	26 Lunch	27
28	29 Lunch	30 Lunch	31 Lunch	01 Lunch	02 Lunch	03
04	05 Lunch	06 Lunch	07 Lunch	08 Lunch	09 Lunch	10

10/2/2018

- HAMBURGER ON A BUN:WW
- LASAGNA WITH GROUND BEEF
- Chicken Patty On Bun
- CAJUN SAUSAGE/TURKEY JAMBALAYA
- HOT DOG ON A BUN:turkey hot

Today < > May, 2019

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
28	29	30 Lunch X	01 Lunch X	02 Lunch X	03 Lunch X	04
05	06 Lunch X	07 Lunch X	08 Lunch X	09	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	01
02	03	04	05	06	07	08


4/30/2019

- HAMBURGER ON A BUN:WW
- LASAGNA WITH GROUND BEEF
- Chicken Patty On Bun
- CAJUN SAUSAGE/TURKEY JAMBALAYA
- HOT DOG ON A BUN:turkey hot

Copy Selection Done

## Deleting Menu

1. Click **Menu**.
2. Click **Maintenance**.
3. Enter a menu name to find a specific menu or leave the field blank for all menus.
4. Click **Search**.
5. Click the **Menu#** hyperlink, or double-click the Menu Name of the menu you want to open.
6. On the General tab from within the menu, click the menu you would like to delete. To select multiple menus on sequential days, click the first calendar date so it is highlighted blue, and then click the last date while holding the **SHIFT** key; all the days in between will be selected.



15	16	17	18	19	20	21
	Lunch x	Lunch x	Lunch x	Lunch x	Lunch x	
22	23	24	25	26	27	28
	Lunch x	Lunch x	Lunch x			
29	30	31	01	02	03	04

Import Cycle Menu Copy Delete

To select multiple menus on different, non-sequential days, click the first menu so that the text is highlighted (not the calendar square), and then click the other menus while holding the **CTRL** key.

7. Click **Delete**.



15	16	17	18	19	20	21
	Lunch x	Lunch x	Lunch x	Lunch x	Lunch x	
22	23	24	25	26	27	28
	Lunch x	Lunch x	Lunch x			
29	30	31	01	02	03	04

Import Cycle Menu Copy Delete

8. On the confirmation pop-up, click **Yes**.

## Activating and Deactivating Menus

Menus can be deactivated or activated at any time.

1. Click **Menus**.
2. Click **Maintenance**.
3. Enter a menu name to find a specific menu or leave the field blank for all menus.
4. Select **Yes**, from the Active drop-down.
5. Click **Search**.
6. Click **Setup** in the right-hand column or double-click the Menu Name to open the menu.
7. On the **General** tab, click **Deactivate**.
8. Click **Save**, then **Cancel** to exit the screen.
9. To reactivate a menu, follow steps 1 through 6 and then click **Activate**.

## Cycle Menus

The Cycle Menus screen provides various functions including modification, copying, and viewing cycle menus. You also have access to recipe information and meal totals.

## Creating Cycle Menus and Establishing Cycle Menu Details

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

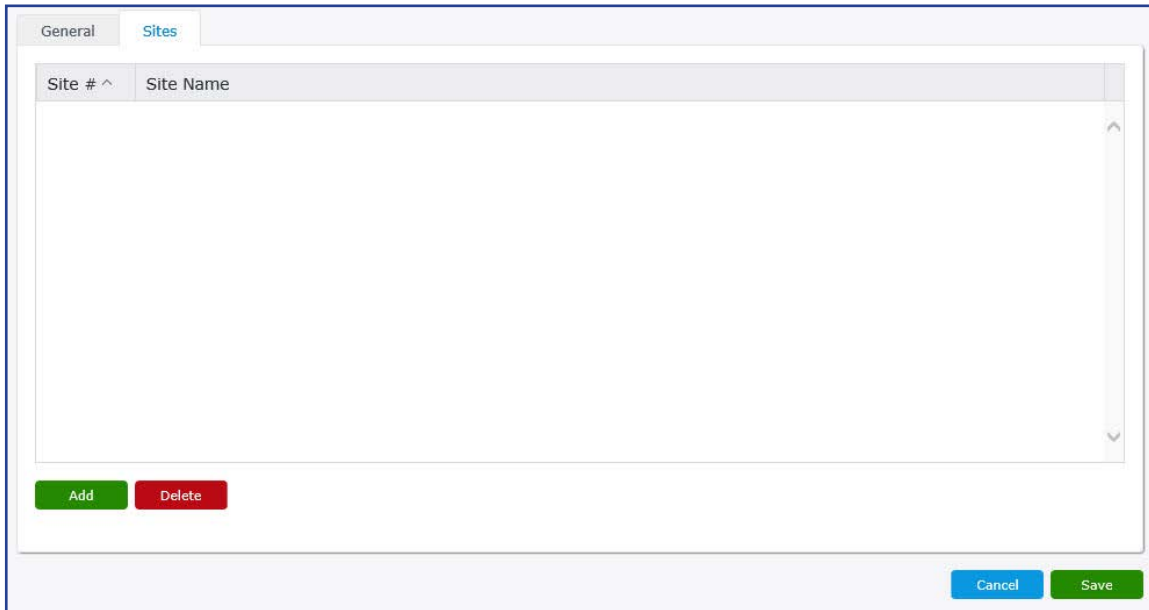
1. Click **Menus**.
2. Click **Cycle Menu**.
3. Click **Add**.
4. Type a cycle menu name. There is a 50 character limit.
5. From the **Meal Pattern** drop-down, select **HHFKA** or **Other**.
6. From the serving period drop-down, select **Breakfast** or **Lunch**.
7. Select an age and grade grouping to establish the nutrient guidelines. All required nutrients will populate automatically.
8. Enter in your Optional Nutrient Standards, if they have been provided by your state agency.

The screenshot displays the 'General' tab of the Cycle Menu configuration interface. It includes the following fields and sections:

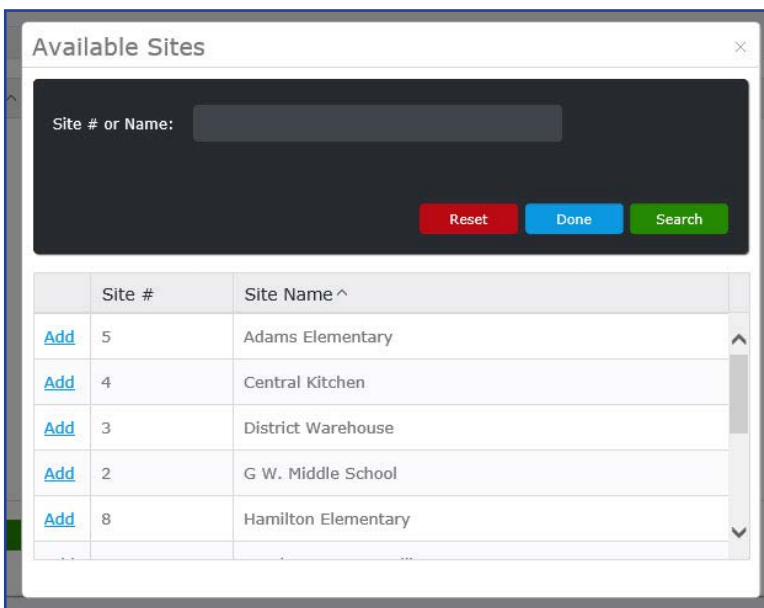
- General:** Cycle #: 3; Cycle Menu Name: HHFKA Lunch K-5
- Menu Planning Options:** Meal Pattern: HHFKA; Serving Period: Lunch; Age/Grade Group: K-5 (Age 5-10)
- Nutrient Standards:**
  - Calories - Min: 550; Calories - Max: 650
  - Total Fat: 30; Saturated Fat: 10; Cholesterol: ; Sodium: 1230; Carbohydrate: |
  - Dietary Fiber: 19; Protein: ; Iron: ; Calcium: ; Vitamin A: ; Vitamin C: ; Sugars: ;
  - Units: g\*, mg\*, % or less\*, mg or less, g\*
- Footer:** \* Denotes User Defined Fields; Cancel; Save

# MENUS

9. Click the **Sites** tab.
10. Click **Add** to begin adding sites to the menu cycle.



11. To search for specific sites, enter a site number or name and click **Search**. If you want to list all available sites, click **Search** without entering anything in the search bar. Click **Reset** to reset the search list.
12. A list of sites will appear based on your search criteria. To add a site, click the **Add** link to left of their site number.
13. When you have added all applicable sites, click **Done**.  
**Note:** If you need to remove a site from the site list, click the site and then click **Delete**.



14. When finished, click **Save** to create the Cycle Menu.

# MENUS

- From the Cycle Menus screen, enter a cycle menu name to find a specific cycle menu or leave the field blank for all menus.
- Click **Search**.
- Click the **Cycle#** hyperlink, or double-click the Cycle Menu Name of the menu you want to open.

Cycle Menu Name:  Active:

Serving Period:

Cycle #	Cycle Menu Name ^	Serving Period	Active	Grade/Age Group	
<a href="#">1</a>	<a href="#">Example Cycle Menu</a>	Lunch	Yes	K-8 (age 5-13)	<a href="#">Setup</a>
<a href="#">2</a>	<a href="#">HS Lunch Cycle Menu</a>	Lunch	Yes	9-12 (age 14-18)	<a href="#">Setup</a>
<a href="#">3</a>	<a href="#">K-8 BRK Cycle Menu</a>	Breakfast	Yes	K-8 (age 5-13)	<a href="#">Setup</a>

## General Tab

- Select a cycle range from the drop-down. They are divided into four week cycle blocks.
  - Double-click on the desired day you would like to add recipes.
- Note:** When double-clicking on a day, you will automatically be redirected to the Recipes tab.

Menu #: 1      Serving Period: Lunch

Menu Name: Elementary Lunch-Traditional      Age/Grade Group: K-5 (age 5-10)

Weeks 1-4

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
01	02 Monday Menu >	03 Tuesday >	04 Wednesday >	05 Thursday >	06 Friday Menu >	07
08	09	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28

**Preview**

LASAGNA WITH GROUND BEEF

HAM & CHEESE SANDWICH

GREEN BEANS: canned,cooked \*RESIZED\*

PEACH COBBLER

MILK, Non Fat Chocolate

MILK, 1% Lowfat



## Recipes Tab

1. Confirm the Cycle Menu Date is correct in the upper left-hand corner. This should be the same as the date you selected in step 7.
2. You may give the menu a name using the **Menu Name** field. If this is left blank, the menu name will default to the name of the meal session, such as “Breakfast” or “Lunch.”
3. Click **Add** to add recipes to the menu cycle.
  - a. Enter in a Recipe # or a partial description of the recipe you want to add to the menu.  
**Note:** To narrow your search select a Group Code or Source from the appropriate drop-down.
  - b. Click **Search**. A list of all items that contain the entered text should be displayed in the grid.
  - c. To select the menu item click the **Add** hyperlink in the left-hand column.
  - d. To select multiple items select all of the items by clicking **Add** next to them and when you have selected all of the items click **Done**.
  - e. Click **Save**.

4. Repeat steps 6 through 10 to add additional recipes to your cycle menu.
5. Enter Planned Reimbursable and Planned A La Carte counts as applicable.
6. Click **Save**.
7. When finished, you may click **Cancel** or continue to the tasks in the **Meal Totals** tab.

## Replacing Recipes in Cycle Menu

1. Click **Menus**.
2. Click **Cycle Menu**.
3. Enter a cycle menu name to find a specific cycle menu or leave the field blank for all menus.
4. Click **Search**.
5. Click the **Cycle#** hyperlink, or double-click the Cycle Menu Name of the menu you want to open.
6. Select a cycle range from the drop-down. They are divided into four week cycle blocks.
7. Double-click on the desired day you would like to delete recipes.
8. Highlight the recipe you want to replace.
9. Click **Replace Recipe**.
10. Enter criteria for the recipe you want to use to replace the current one and click **Search**. If you want a list of all available recipes, leave the fields blank and click **Search**.
11. A list of recipes will appear based on the search criteria. The current recipe that is being replaced is displayed above this list. To replace the current recipe, click **Replace** next to the recipe that you would like to use.

### Replace Recipe Search

Recipe # or Description:  Source:

Group Code:

\* Only the first 200 items shown \*

	Recipe #	Description	Portion	Cost	Calories <sup>1</sup> (kcal)	Satu Fat <sup>1</sup> (g)
<b>Current Recipe</b>	64	APPLES,Fresh	EACH		55	0.0
<a href="#">Replace</a>	197	APPLE/PEAR CRISP	SERVINGS		195	1.6
<a href="#">Replace</a>	190	APPLES, CANNED, Sliced	CUP		72	0.0
<a href="#">Replace</a>	64	APPLES,Fresh	EACH		55	0.0
<a href="#">Replace</a>	356	APPLESAUCE,SWEETENED	1 CUP		167	0.1
<a href="#">Replace</a>	1100	APPLESAUCE,SWEETENED *RESIZED*	1/2 CUP		84	0.0

## Entering Production Quantities

The Production Quantity button allows you to enter Planned, Offered, and Served values. Perform the following procedure to enter production quantities.

1. Click **Menus**.
2. Click **Cycle Menu**.
3. Enter a cycle menu name to find a specific cycle menu or leave the field blank for all menus.
4. Click **Search**.
5. Click the **Cycle#** hyperlink, or double-click the Cycle Menu Name of the menu you want to open.
6. Select a cycle range from the drop-down. They are divided into four week cycle blocks.
7. Double-click a menu day that has a menu already planned on it.

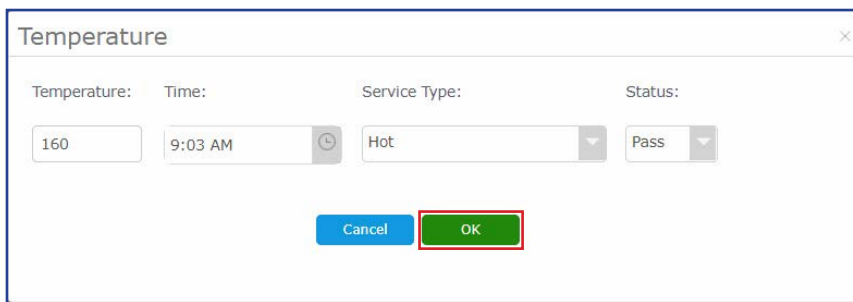
# MENUS

8. Click the **Recipes** tab.
9. Click the **Production Quantities** on the lower left-hand corner to add your numbers for the day (the user can enter Planned, Offered, and Served values).

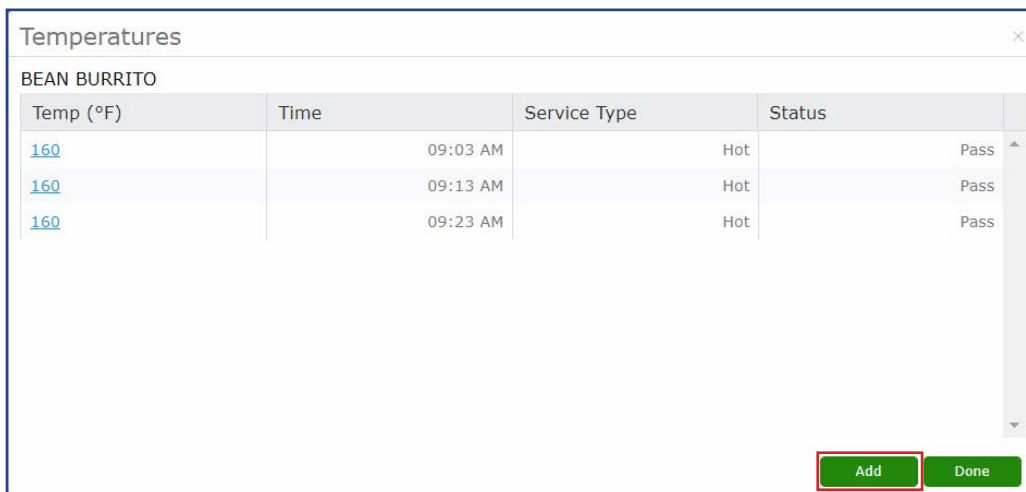


10. Select the desired site from the drop-down in the upper left-hand corner, enter your counts. If you do not see the desired site, refer to the **Assigning Production Sites to Menus** topic.
11. Enter production count. Click in the field and then type the appropriate count. For each menu item, enter the corresponding reimbursable and a la carte production counts.
 

**Note:** Reimbursable Meal Totals are required when adding Planned, Offered, and Served reimbursable meal counts.
12. Enter temperatures (in degrees Fahrenheit) in the **Temp (°F)** column by clicking the plus sign if the menu item needs to be at a specific temperature.
  - a. Enter a Temperature.
  - b. Use the drop-down menu to select the Time the temperature was recorded.
  - c. Use the drop-down menu to select a Service Type.
  - d. Use the drop-down menu to establish a Status (Pass/Fail).
  - e. Click **Ok**.



- f. Click **Add** to repeat the process for each temperature recording of the recipe as needed. Click **Done** when you have completed adding all temperature logs.



13. Enter any additional information you would like to appear on a Production Record for a menu item in the **Comment** column.

Additional Recipe Tab Options	Description
Prev Day	Precedes to the previous calendar menu day.
Next Day	Proceeds to the next calendar menu day.
Clear	Removes all values within the planned, offered, and served columns.
Cancel	Cancel out any changes that have been made, provided Save has not yet been clicked.
Save	Saves all entered data.

14. Click **Save**.

15. When finished, click **Cancel**.

**Note:** Depending on your user permissions, you may be restricted from entering or editing the Planned and Offered amounts. If this needs to be changed, you will need to edit that permission in Security Groups on the Setup tab.

Home > Menus > Menu Search > Edit

Site: GEORGE WASHINGTON ELEMENTARY

Wednesday, October 4, 2017

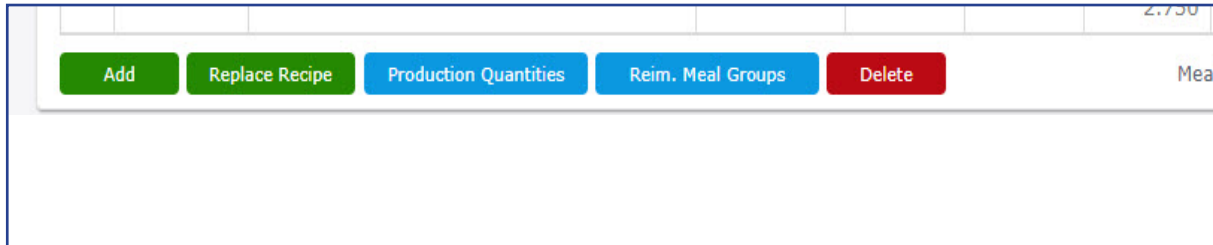
Prev Day Next Day

Recipe Name	Portion	Planned		Offered		Served				Temp (°F)	Comment
		Reim-burse	A La Carte	Reim-burse	A La Carte	Reim-burse	A La Carte	Short Leftover	Waste		
<b>Meal Totals</b>		250	0	0	0	0	0	0	0		
BEAN BURRITO	PQ History SERVINGS	100	0	0	0	0	0	0	0		
BEEF BURRITO	PQ History EACH	150	0	0	0	0	0	0	0		
CORN: canned, yellow	PQ History CUP	50	0	0	0	0	0	0	0		
MEXICALI CORN	PQ History 1/4 CUP	200	0	0	0	0	0	0	0		
MILK,Skim	PQ History HALF PINT	100	0	0	0	0	0	0	0		
MILK,1% Lowfat	PQ History HALF PINT	150	0	0	0	0	0	0	0		
ORANGES HALVES	PQ History 1/2 EACH	250	0	0	0	0	0	0	0		

Add Leftovers Delete Leftovers Copy Base Copy Planned Copy Offered Over/Short Clear Cancel Save

## Viewing Reimbursable Meal Groups

When planning menus, you can use the Reimbursable Meal Groups page to define your reimbursable meals by component to ensure they meet the daily meal pattern requirements. The page can also be used to check already present items to make sure they are eligible for reimbursable meal classification. To access the Reimbursable Meal Groups page, click **Reim. Meal Groups**.



On the Reimbursable Meal Groups page, reimbursable meals defined within the Recipes tab are listed under Defined Reimbursable Meals, and meal component requirements are listed under Daily Meal Pattern Requirements and Milk Offered Requirements. For more information on reimbursable meals and how to use this page, see the Certification of Compliance section of this guide.

Menu Name: Elementary Lunch-Traditional      Week 1 - Thursday      Prev Day Next Day

### Defined Reimbursable Meals

Meal Name	
<a href="#">Taco with Fruit Side</a>	✔
<a href="#">Taco with Side Salad</a>	❗

### Daily Meal Pattern Requirements

Component	Required Min	Actual Min	
Meat/Meat Alt	1.000 oz eq	2.000	✔
Grain	1.000 oz eq	1.000	✔
Fruit	0.500 cup	0.000	❗
Vegetable	0.750 cup	1.250	✔
Milk	1.000 cup	1.000	✔

### Milk Offered Requirements

Component		
Skim/Fat Free/Unflavored	<input checked="" type="checkbox"/>	✔
Skim/Fat Free/Flavored	<input type="checkbox"/>	✔
Low-Fat(1% or less)/Unflavored	<input checked="" type="checkbox"/>	✔
Low-Fat(1% or less)/Flavored	<input type="checkbox"/>	✔
Reduced-Fat(2% or whole)	<input type="checkbox"/>	✔

## Deleting Recipes from Cycle Menus

1. Click **Menus**.
2. Click **Cycle Menus**.
3. Enter a cycle menu name to find a specific cycle menu or leave the field blank for all menus.
4. Click **Search**.
5. Click the **Cycle#** hyperlink, or double-click the Cycle Menu Name of the menu you want to open.
6. Select a cycle range from the drop-down. They are divided into four week cycle blocks.
7. Double-click on the desired day you would like to delete recipes.
8. Confirm the Cycle Menu Date is correct in the upper left-hand corner. This should be the same as the date you selected in step 7.
9. Highlight the recipe row you want to delete.
10. Click **Delete**.

# MENUS

11. Click **Save**.
12. Click **Cancel** when done.

## Meal Totals Tab

The Meal Totals tab allows you to view the planned, offered, and served quantities, reimbursable and a la carte, for a selected menu, date, and site.

Site #	Site Name	Planned Reimbursable	Planned A La Carte	Offered Reimbursable	Offered A La Carte	Served Reimbursable	Served A La Carte
5	Adams Elementary	200	0	200	0	0	0
1	T. Jefferson Elementary	450	5	450	5	0	0
0	Hamilton Elementary	500	0	500	0	0	0
7	Lincoln Elementary	700	0	700	0	0	0

## Editing Cycle Menu General Information

1. Click **Menus**.
2. Click **Cycle Menu**.
3. Enter a cycle menu name to find a specific cycle menu or leave the field blank for all menus.
4. Click **Search**.
5. Click **Setup** in the right-hand column to edit the cycle menu information.
6. Within this screen, you can edit the following:
  - Cycle Menu Name
  - Meal Pattern
  - Serving Period
  - Age/Grade Group
  - Total Fat
  - Cholesterol
  - Carbohydrate
  - Dietary Fiber
  - Protein
  - Iron
  - Calcium
  - Vitamin A
  - Vitamin C
  - Sugars

**Note:** The Healthy Hunger Free Kids Act has established guidelines for specific nutrients (calories, sodium, and saturated fat) based on specific age and grade groups. They will appear in gray and cannot be modified. Additionally, the Cycle # cannot be modified.

7. Click **Save**.
8. Click **Cancel** to exit.

The screenshot shows a web interface for editing cycle menu information. It features a 'General' section with 'Cycle #' set to 1 and 'Cycle Menu Name' set to 'Example Cycle Menu'. Below this are 'Menu Planning Options' including 'Meal Pattern' (HHFKA), 'Serving Period' (Lunch), and 'Age/Grade Group' (K-8 (age 5-13)). The 'Nutrient Standards' section contains a grid of input fields for various nutrients, with some fields (Calories - Min, Calories - Max, Saturated Fat, Sodium, and Carbohydrate) highlighted in gray to indicate they are user-defined or fixed. At the bottom, there are buttons for 'Copy', 'Deactivate', 'Cancel', and 'Save'.

## Copying Cycle Menus

Using the Copy button on a created cycle menu allows you copy a single day or a date range of menus for future dates.

1. While in the *General* tab for a cycle menu, click **Copy**.
2. Use the **Menu Type** drop-down menu to select either *Cycle Menu* or *Calendar Menu*.
3. Use the **Menu Name** drop-down menu to select a cycle menu in which you would like to copy.
4. Use the **Skip Sat & Sunday** drop-down to select if you would like to include or exclude weekends.
5. Use the **Copy Type** drop-down menu to select if you would like to *Append* or *Overwrite*. Selecting **Append** will add the copied selection on top of any pre-existing menus for the selected day. Selecting **Overwrite** will replace any pre-existing menus with the menus that have been copied.
6. From the left-hand calendar, use the drop-down menu to select the correct cycle you want to copy from.
7. From the right-hand calendar, use the drop-down menu to select the correct cycle you want to copy to.
8. To copy a single day's menu, you have two options:  
**Option 1:** Click the menu name ("Lunch" for example) on the calendar on the left and drag that day's menu to the desired date on the calendar on the right.  
**Option 2:** Highlight the day you wish to copy on the left, click the date where you are copying on the right, and click **Copy Selection** to copy that menu to the date you have selected.

To copy a date range of menus, you have three options:

9. **Option 1:** Select the range of menus you need to copy. To do this, highlight the date of the first day being copied, hold down the **Shift** key, and click the last date being copied on the menu. Your range of menus will be highlighted in blue.
  10. **Option 2:** Select the starting date for your copied menus by clicking the date on the calendar on the right (the starting date will be highlighted in blue).
  11. **Option 3:** Click **Copy Selection** to paste the copied menus to the new dates.
9. To delete a menu from a day, click on the **x** to the right of the menu name on the calendar day you copied to. A confirmation prompts displays, click **Yes** or **No**.
  10. Repeat the process until all days have been copied.
  11. When finished, click **Done**.

The screenshot shows the 'Edit' interface for a cycle menu titled 'Elem Lunch - Around the World'. At the top, there are fields for 'Menu Type' (set to 'Cycle Menu'), 'Menu Name' (set to 'Elem Lunch - Around the World'), 'Skip Sat & Sun' (set to 'No'), and 'Copy Type' (set to 'Append'). A 'Drag items from left to right' instruction is also present.

Below these fields are two calendar grids. The left calendar shows 'Weeks 1-4' with dates 01 through 28. The right calendar also shows 'Weeks 1-4' with dates 01 through 28. In the left calendar, the days Monday through Friday of Week 1 are highlighted in blue. In the right calendar, the days Wednesday through Friday of Week 4 are highlighted in blue.

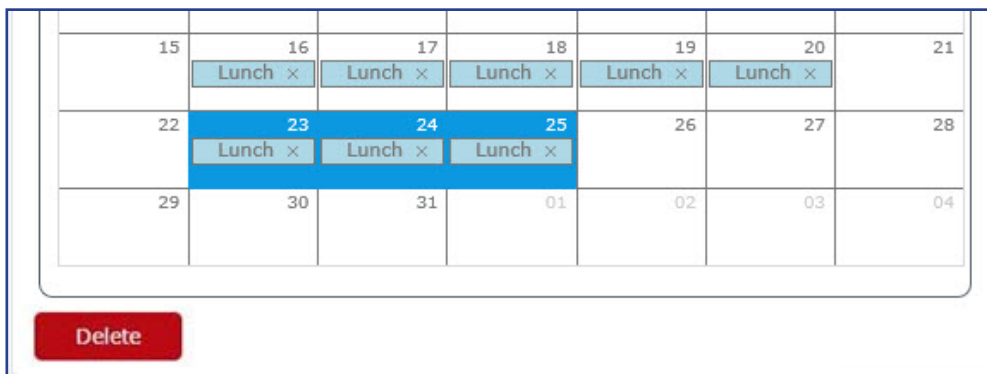
At the bottom, there are two lists of menu items. The left list is for 'Week 1 - Wednesday' and includes: 1. APRICOTS,CND,LT SYRUP PK,W/SKN; 2. CHICKEN CURRY CASSEROLE; 3. FISH NUGGETS W/ROLL; 4. HONEY-LEMON CHICKEN; 5. MEDITERRANEAN QUINOA SALAD. The right list is for 'Week 4 - Wednesday' and is currently empty.

At the bottom right of the interface, there are two buttons: 'Copy Selection' and 'Done'.



## Deleting Cycle Menu

1. Click **Menus**.
2. Click **Cycle Menu**.
3. Enter a cycle menu name to find a specific cycle menu or leave the field blank for all cycle menus.
4. Click **Search**.
5. Click the **Cycle #** hyperlink, or double-click the Cycle Menu Name of the cycle menu you want to open.
6. On the General tab from within the cycle menu, click the cycle menu you would like to delete. To select multiple cycle menus on sequential days, click the first calendar date so it is highlighted blue, and then click the last date while holding the **SHIFT** key; all the days in between will be selected. To select multiple cycle menus on different, non-sequential days, click the first cycle menu so that the text is highlighted (not the calendar square), and then click the other cycle menus while holding the **CTRL** key.



7. Click **Delete**.
8. On the confirmation pop-up, click **Yes**.



# MENUS

## Activating and Deactivating Cycle Menu

Cycle menus can be deactivated or activated at any time.

1. Click **Menus**.
2. Click **Cycle Menu**.
3. Enter a cycle menu name to find a specific cycle menu or leave the field blank for all menus.
4. Select **Yes** from the Active drop-down.
5. Click **Search**.
6. Click **Setup** in the right-hand column to open the selected cycle menu.
7. Click **Deactivate**.
8. Click **Save**, then **Cancel** to exit the screen.



9. To reactivate a menu, follow steps 1 through 6 and then click **Activate**.



## Replace Menu Recipe

The Replace Menu Recipe page allows you to search through menus and replace recipes in them. This can be useful for when a recipe is found to be unpopular, and instead of having to edit each menu day in which the recipe appears, you can replace the recipe in many menus at once.

## Replacing Recipes in Menus

Perform the following procedure to replace a recipe in multiple menus.

1. Click **Menus**.
2. Click **Replace Menu Recipe**.
3. Search for the recipe that will be replaced. Enter a recipe number or description (or leave the field blank for a full list of recipes) and click **Find** under "Original Recipe."

The form consists of two side-by-side search boxes. The left box is titled 'Original Recipe' and contains a text input field with the placeholder 'Recipe # or Description:', a 'None' label below it, and a blue 'Find' button. The right box is titled 'Replacement Recipe' and contains a similar text input field with the placeholder 'Recipe # or Description:', a 'None' label below it, and a blue 'Find' button.

- If an exact match is not found, or if searching the full list, select the recipe from the list and click **Select**.

Recipe #	Description ^
990015	ALMOND SNACK MIX
990016	ALMONDS, YOGURT, FRUIT LUN...
500047	APPLE COBBLER
542	APPLE COBBLER local
500001	APPLE CRISP
48	APPLE CRISPFdfdfdsf
63	APPLE JUICE:cnnd,unswtn,+vit C
292	APPLE/CARROT/RAISIN/SALAD
500002	APPLE-HONEY CRISP
64	APPLES,Fresh
500003	APPLESAUCE CAKE

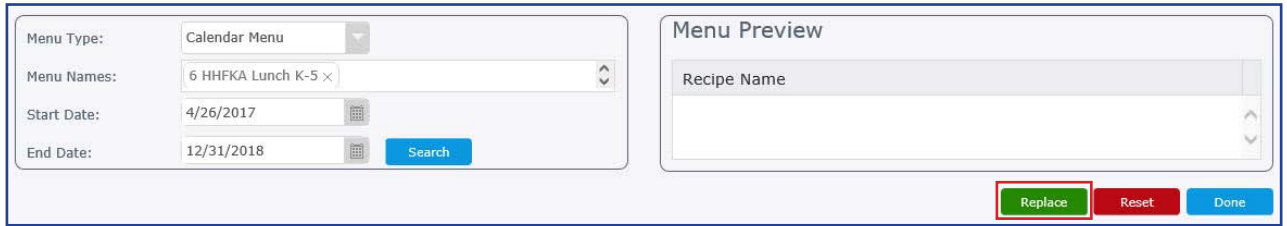
- Search for the recipe that will replace the original. Enter a recipe number or description (or leave the field blank for a full list of recipes) and click Find under “Replacement Recipe.”

- If an exact match is not found, or if searching the full list, select the recipe from the list and click **Select**.
- Search for the menus that will have their original recipe replaced by the new one. Use the search parameters under the Original Recipe pane. You can search by Calendar Menu or Cycle Menu. A Menu Name must be selected to perform the search. When you have entered your search parameters, click **Search**.

- The search results will appear in a list below. Use the checkboxes to select which menus will have their original recipe replaced, or click the top checkbox to select all the menus in the list.

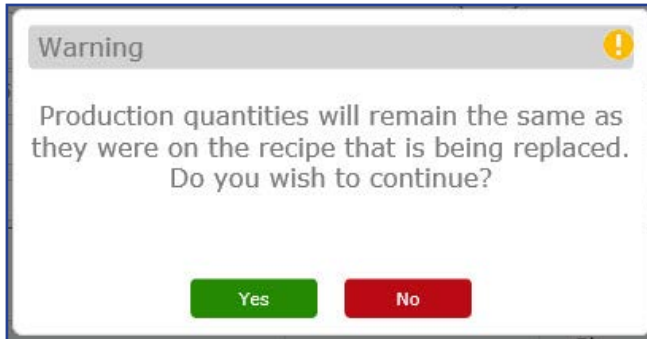
<input type="checkbox"/>	Menu #	Menu Name	Menu Date	Planned Reimb	Planned AlaCarte	Serving Period	Grade/Age Group	Active
<input checked="" type="checkbox"/>	6	6 HHFKA Lunch K-5	Tue, 08/01/2017	100	100	Lunch	K-5 (age 5-10)	Yes
<input type="checkbox"/>	6	6 HHFKA Lunch K-5	Wed, 08/02/2017	200	200	Lunch	K-5 (age 5-10)	Yes
<input checked="" type="checkbox"/>	6	6 HHFKA Lunch K-5	Thu, 08/03/2017	300	300	Lunch	K-5 (age 5-10)	Yes
<input type="checkbox"/>	6	6 HHFKA Lunch K-5	Fri, 08/04/2017	400	400	Lunch	K-5 (age 5-10)	Yes
<input checked="" type="checkbox"/>	6	6 HHFKA Lunch K-5	Sat, 08/05/2017	500	500	Lunch	K-5 (age 5-10)	Yes

9. Click **Replace**.



The screenshot shows a web interface for menu management. On the left, there is a search form with the following fields: 'Menu Type' set to 'Calendar Menu', 'Menu Names' with '6 HHFKA Lunch K-5' selected, 'Start Date' set to '4/26/2017', and 'End Date' set to '12/31/2018'. A blue 'Search' button is located to the right of the date fields. On the right side, there is a 'Menu Preview' section with a 'Recipe Name' field. At the bottom right of the interface, there are three buttons: 'Replace' (green), 'Reset' (red), and 'Done' (blue). The 'Replace' button is highlighted with a red rectangular box.

10. A pop-up will appear, warning that production quantities will remain the same for the new recipe as they were for the original recipe. Click **Yes** to proceed with replacing the recipe.



11. Repeat steps 3-10 if you need to replace additional menu recipes.

12. When finished, click **Done**.

# PRODUCTS

## Products Overview

Within Products, you can define the items, for example food items, paper goods, cleaning products, as well as manage categories. Products include information such as description, shelf life, category information, item information, and notes.

**Note:** If you have access to Mosaic Menu Planning and Production you can link an ingredient to a product. Please refer to the Mosaic Menu Planning user guide for linking instructions.



## Maintenance

Perform the following procedure to search for products.

1. From the left-hand navigation bar, click **Products**.
2. Click **Maintenance**.
3. Select your search criteria. **Note:** The filters can be left blank to display all products in the search results.
4. Click **Search**.
5. Click the hyperlink in the **Product #** column to open the product.

Product #	Description	Brand	Product Category	Usage Category	Storage Category	Qty per Purchase Unit	Active	Needs Attenti...	P/U UPC ...	S/U UPC ...
<a href="#">424-001</a>	CHEESE CHED JACK SHRED		DAIRY			4 5# BAG per CAS...	Yes	No		
<a href="#">557-001</a>	CHEESE PARMESAN SHRED	AREZ	DAIRY			2 PKG per Case 2/ ...	Yes	No		
<a href="#">632-001</a>	CHEESE AMERICAN 120 SLI...	BBRLCLS	DAIRY			4 PKG per CASE 4/...	Yes	No		

Page 1 of 1 | 125 items per page | 3 items found | maximum items: 250

# PRODUCTS

## Search Options

The search result grid conveniently displays the number of items found. By default, up to 250 items are displayed at once from a single search. You may edit the “maximum items” if you would like to display a bigger or full list of products.

When your search grid presents more items than can displayed on one page, you can use the paging controls to navigate through the results. Additionally, you can adjust the items per page by selecting the desired value from the “items per page” drop-down.

The filters can be left blank to display all products in the search results.

**Product # or Description:** Search for a product with a specific Product # or a list of products that contain the specified description. The Product Number format is as follows:

XXXXXX - ###  
General Item Number  
Product Number

If you type only the general product number, the search result will include all items associated with that product.

**Product Category:** Search using a specific product category type.

**Usage Category:** Search using a specific usage category type.

**Storage Category:** Search using a specific storage category type.

**Active:** Search for all active or inactive products.

**Needs Attention:** Search for products containing notes that are marked as **Yes** or **No** for needs attention.

**UPC Code:** Search using the product’s UPC code.

**Note:** The entered value must be an exact match.

**Finished Product:** Search for products that were created from recipes using the “Create Finished Product” feature.

The screenshot shows a web application interface for product maintenance. At the top, there is a breadcrumb trail: Home > Products > Maintenance. Below this is a search filter panel with the following fields:

- Product # or Description: [Text input]
- Product Category: [Dropdown menu]
- Usage Category: [Dropdown menu]
- Storage Category: [Dropdown menu]
- Active: [Dropdown menu, set to Yes]
- Needs Attention: [Dropdown menu]
- UPC Code: [Text input]
- Finished Product: [Dropdown menu, set to No]

At the bottom right of the filter panel are three buttons: Reset (red), Add (green), and Search (blue).

Below the filter panel is a table with the following columns: Product #, Description, Brand, Product Category, Usage Category, Storage Category, and Qty per Purchase Unit. The table contains five rows of product data:

Product #	Description	Brand	Product Category	Usage Category	Storage Category	Qty per Purchase Unit
<a href="#">02-001</a>	ROLLS, HAMBURGER WW	SARAH LEE	Breads and Grains	Purchased Food	Stockroom	6 BAG 30 COUNT ...
<a href="#">03-001</a>	CORN, CANNED YELLOW	LIBBY	Vegetables, Canned	Purchased Food	Stockroom	6 #10 CAN per CA...
<a href="#">03-002</a>	CORN, CANNED YELLOW	ABC	Vegetables, Canned	Purchased Food	Stockroom	6 #10 Can per Cas...
<a href="#">088-001</a>	Chocolate Milk FF MooMoo Dairy	MooMoo Dairy	XDairy, Fres	Purchased Food	Cooler	50 Carton per case...
<a href="#">1000-001</a>	STOCK POT (20qt), Stainless Steel w/Lid	RKO	Smallwares	Supplies	Stockroom	1 Stockpot 20qt pe...

At the bottom of the table, there is a pagination and search summary area. It includes navigation buttons (back, forward, first, last), a page indicator (Page 1 of 1), an items per page dropdown (set to 125), and a search summary (51 items found, maximum items: 250).

## Adding Products

Perform the following procedure to add a product to your database.

1. From the left-hand navigation bar, click **Products**.
2. Click **Maintenance**.
3. Click **Add**.
4. Enter the information for the product on the General, Item Information (price lists), and Notes tabs.
5. Click **Save**.

## General Tab

1. The system will automatically display the next available product number or you can enter a desired general Product Number and press the Tab key.  
**Note:** All required fields are denoted with an asterisk\*
2. Enter a description in the **Description** field.  
Use a descriptive name for the product. The description is used to identify the product in your database.
3. Enter the number of days in the **Shelf Life** field that the product may be stored before the safety or quality is diminished.
4. From the Product Category drop-down, select an appropriate product category.
5. From the Usage Category drop-down, select an appropriate usage category.
6. From the Storage Category drop-down, select an appropriate storage category.
7. From the Exclude from Orders drop-down, select **Yes** or **No**. Use this option to identify and exclude products from menu plan orders, so that they do not show up on requisitions.
8. From the Exclude from Rounding drop-down, select **Yes** or **No**.
9. From the Bidding Priority drop-down, select Low, Medium, or High. This will default to Medium. This priority can be used as part of the bid ranking when determining which vendor should be awarded the bid.
10. From the Site Groups drop-down, select a site. This will default to All Sites. If you would like to restrict the product to specific site groups, click the All Sites **X** to remove the group, and then select the preferred site group. Multiple site groups can be added.

Home > Products > Maintenance > Edit

General | Item Information | Notes | Attachments | Fulfillment

Product Number:*	<input type="text" value="390051"/>	Exclude from Orders:	<input type="text" value="No"/>
Description:*	<input type="text" value="Kidney Beans, Canned"/>	Exclude from Rounding:	<input type="text" value="No"/>
Shelf Life (Days):	<input type="text" value="356"/>	Bid Priority:	<input type="text" value="Medium"/>
Product Category:*	<input type="text" value="Beans, Canned"/>	Site Groups:*	<input type="text" value="All Sites X"/>
Usage Category:	<input type="text" value="Purchased Food"/>		
Storage Category:	<input type="text" value="Stockroom"/>		

# PRODUCTS

## Item Information Tab

The item information tab allows you to enter information for specific items that may be ordered. This is useful for differentiating between different brands and/or pack sizes that are available for that product. All required fields are denoted with an asterisk (\*). You may have one item per product or you can add several items.

### Item Information Tab Fields

Field	Description
<b>Manufacturer</b>	Enter the manufacturer's name or select the appropriate manufacturer from the drop-down.
<b>Manufacturer Product Number</b>	Enter the unique manufacturer's product number.
<b>Brand</b>	Enter the brand specific to the product. For example, a brand of cheese could be Kraft or Cracker Barrel.
<b>Purchase Unit Description</b>	Enter the unit in which the product can be purchased. For example, case, pounds (lb), box.
<b>Purchase Unit Weight and Measurement</b>	Enter how much the purchase unit weighs. Select <b>Ounces</b> or <b>Pounds</b> from the Purchase Unit Weight Measurement drop-down.
<b>Stock Unit Description</b>	Enter a description for the stock unit. The stock unit description describes how an item will be counted or how it will be stocked. For example, if a Case 6/10 (green beans) is opened, there are 6 #10 cans, so it should be entered as "Can #10" or "#10 Can"
<b>Status</b>	Select <b>Available</b> (Default) or <b>Discontinued</b> from the Status drop-down.
<b>Commodity</b>	Designate if the item is an USDA commodity item by selecting <b>Yes</b> or <b>No</b> from the Commodity drop-down.
<b>Commodity Fair Market Value</b>	The Commodity Fair Market Value can be entered if you selected <b>Yes</b> from the Commodity drop-down. Enter the per purchase unit amount, if you had to purchase this item. This information should be provided to you by the USDA.
<b>Default Price per Purchase Unit</b>	Enter the value of the purchase unit.
<b>Purchase Unit UPC Code</b>	Enter the Universal Product Code associated with the item's purchase unit.
<b>Stock Unit UPC Code</b>	Enter the Universal Product Code associated with the item's stock unit.
<b>Stock Units per Purchase Unit</b>	Enter the how many items are included in the purchase unit. For example, if there are <b>12</b> cans per case, enter <b>12</b> . <b>Note:</b> This cannot be changed once the item has been part of a transaction.
<b>Exclude from Usage</b>	Designate if the product will be excluded from usage.

General | **Item Information** | Notes | Attachments | Availability | Fulfillment

Item Number: 001      Status: Available

Manufacturer:       Commodity: No

Manufacturer Product Number: 12345      Commodity Fair Market Value:

Brand: SARAH LEE      Default Purchase Unit Price:\* 20.0000

Purchase Unit Description:\* CASE 6/BAGS      Purchase Unit UPC Code: 12345

Purchase Unit Weight:\* 10 Pounds      Stock Unit UPC Code: 54321

Stock Unit Description:\* BAG 30 COUNT      Stock Units per Purchase Unit:\* 6

Exclude from Usage: No

Price Lists      Status Filter:

List #	Description	Vendor	Vendor Pr...	Start Date	End Date	Commodity Processing Fee	Purchase Unit Price	Status
1	Sysco	Sysco	87765	7/1/2016	12/31/2021		18.0000	In Use



## Price Lists

All price lists for the product are displayed. You can use the Status Filter to view the list by specified status (Expired, In Use, Scheduled, Deactivated).

The screenshot shows a product maintenance form with the following fields and values:

- Item Number: 001
- Manufacturer: (empty)
- Manufacturer Product Number: 12345
- Brand: SARAH LEE
- Purchase Unit Description: CASE 6/BAGS
- Purchase Unit Weight: 10 Pounds
- Stock Unit Description: BAG 30 COUNT
- Exclude from Usage: No
- Status: Available
- Commodity: No
- Commodity Fair Market Value: (empty)
- Default Purchase Unit Price: 20.0000
- Purchase Unit UPC Code: 12345
- Stock Unit UPC Code: 54321
- Stock Units per Purchase Unit: 6

The Price Lists table is highlighted with a red box and contains the following data:

List #	Description	Vendor	Vendor Pr...	Start Date	End Date	Commodity Processing Fee	Purchase Unit Price	Status
1	Sysco	Sysco	87765	7/1/2016	12/31/2021		18.0000	In Use

## Notes Tab

The Notes tab allows you to add notes that inform you or your organization of relevant information about a product. A note can be marked with a **Needs Attention** flag. This flag can assist as a reminder that there is some type of action that is required. For example, a product that is going to be discontinued at the end of the year.

### Add a Note

Perform the following procedure to add a note.

1. From the left-hand navigation bar, click **Products**.
2. Click **Maintenance**.
3. Select your search criteria. **Note:** The filters can be left blank to display all products in the search results.
4. Click **Search**.
5. Click the hyperlink in the **Product #** column to open the product.
6. Click **Notes** tab.
7. Click **Add**.
8. Enter the note content.
9. Select **Yes** from the Needs Attention drop-down or leave the default setting to **No**.
10. Click **OK**.

The screenshot shows a dialog box titled "Note #1" with the following content:

Note Text:  
Product will be discontinued 6/30/16.

Needs Attention: Yes

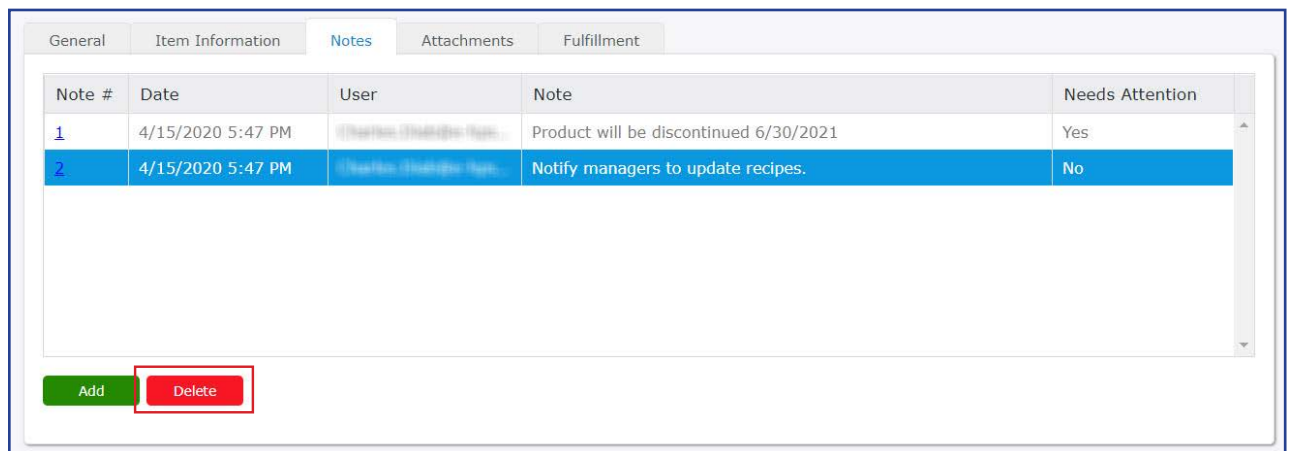
Buttons: Cancel, OK

## Delete a Note

Perform the following procedure to delete a note.

1. From the left-hand navigation bar, click **Products**.
2. Click **Maintenance**.
3. Select your search criteria.  
**Note:** The filters can be left blank to display all products in the search results.
4. Click **Search**.
5. Click the hyperlink in the **Product #** column to open the product.
6. Click **Notes** tab.
7. Click the note you would like to delete.
8. Click **Delete**.

**Note:** You cannot delete a note that is marked as Needs Attention or a note created by a different user.



9. Click **Yes** at the confirmation prompt.

## Edit a Note

Use the note editing feature to change the Needs Attention flag. The edit feature is only available to the user that created the note. Perform the following procedure to edit a note.

1. From the left-hand navigation bar, click **Products**.
2. Click **Maintenance**.
3. Select your search criteria.  
**Note:** The filters can be left blank to display all products in the search results.
4. Click **Search**.
5. Click the hyperlink in the **Product #** column to open the product.
6. Click **Notes** tab.
7. Click the hyperlink in the **Note #** column to open the product.
8. Perform the necessary changes.
9. Click **OK**.

## Attachments Tab

The Attachments tab allows you to attach files to each product's item. This provides the accessibility of cloud-based storage and the convenience of easily reviewing electronic files such as nutrition facts labels.

### Add Attachments

Perform the following procedure to add an attachment.

1. From the left-hand navigation bar, click **Products**.
2. Click **Maintenance**.
3. Select your search criteria. **Note:** The filters can be left blank to display all products in the search results.
4. Click **Search**.
5. Click the hyperlink in the **Product #** column to open the product.
6. Click the **Attachments** tab.
7. Click **Add**.
8. The Add Attachment window displays. Type a description in the Description field (required).
9. Click **Browse** and locate the file you would like to upload. Acceptable file types are; Adobe Portable Document Format (.pdf), Microsoft Excel spreadsheet (.xls and .xlsx), Microsoft Word document (.doc and .docx), text (.txt), and image files (.gif, .jpg, .jpeg, and .png).  
**Note:** The attachment file's name cannot include commas.
10. Select the desired file, and click **Open**.
11. Click **Attach**. The **Attachment Saved** prompt displays.

The screenshot shows a dialog box titled "Add Attachment" with a close button in the top right corner. It features two input fields: "Description:" containing the text "Green Bean Product Information" and "File Selected:" containing the text "Delmonte Cut Green Bean Product Info.jpg". At the bottom of the dialog, there are three buttons: "Browse" (blue), "Cancel" (blue), and "Attach" (green). The "Attach" button is highlighted with a red border.

### Open Attachment

Perform the following procedure to open an attachment.

1. From the left-hand navigation bar, click **Products**.
2. Click **Maintenance**.
3. Select your search criteria.  
**Note:** The filters can be left blank to display all products in the search results.
4. Click **Search**.
5. Click the hyperlink in the **Product #** column to open the product.
6. Click **Attachments** tab.

# PRODUCTS

7. Select the file icon in the preview window.

**Note:** When you select a file the Attachment Information grid displays file details.

8. Click **Open**.

**Note:** The attachment may display in a new tab within your web browser or require you to download and open it using an application that supports its file type.

Attachment Information	
File Name	Delmonte Cut Green Bean Product Info.jpg
File Type	JPG
File Size	148.91 KB
Description	Green Bean Product Information
Date Uploaded	May 10, 2017
Uploaded By	Gloria@heartland

## Remove Attachment

Perform the following procedure to permanently remove an attachment.

1. From the left-hand navigation bar, click **Products**.
2. Click **Maintenance**.
3. Select your search criteria.  
**Note:** The filters can be left blank to display all products in the search results.
4. Click **Search**.
5. Click the hyperlink in the **Product #** column to open the product.

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- Click **Attachments** tab.
- Select the file icon in the preview window.

The screenshot shows the 'Attachments' tab of a product management interface. The main area contains a preview window with two image thumbnails. The first is 'Nutritional Facts Label.jpg' and the second is 'Delmonte Cut Green Bean Product Info.jpg'. To the right of the preview is an 'Attachment Information' table:

Attachment Information	
File Name	Delmonte Cut Green Bean Product Info.jpg
File Type	JPG
File Size	148.91 KB
Description	Green Bean Product Information
Date Uploaded	May 10, 2017
Uploaded By	Gloria@heartland

At the bottom of the interface, there are three buttons: 'Add' (green), 'Open' (blue), and 'Remove' (red).

- Click **Remove**.
- Click **Yes** at the confirmation prompt.
- Upon completion, the Attachment Deleted prompt displays.

## Availability Tab

The Availability tab allows you to see which sites have a product on hand. This is useful when you have a product shortage and want to request a transfer from another site manager.

The screenshot shows the 'Availability' tab of a product management interface. The breadcrumb trail is 'Home > Products > Maintenance > Edit : 11111-002, BEANS'. The interface includes a search form with the following fields:

- Site: [Dropdown]
- Site Type: [Dropdown]
- Status: [Dropdown]
- Purchase Unit Description: [Dropdown]
- Stock Unit Description: [Dropdown]

Buttons for 'Reset' (red) and 'Search' (blue) are located at the bottom right of the search form. Below the search form is a table with the following data:

Product #	Brand	Purchase Units	Stock Units	Status	Site #	Site	Site Type	Phone Number
11111-002	Del Monte	6 CS (12oz)	3 6#10	Available	3	CLINTON ELEMENTARY	Food Preparation...	585-555-1212
11111-002	Del Monte	3 CS (12oz)	3 6#10	Available	8	Heartland Middle School	Food Preparation...	585-555-8743
11111-001	Birds Eye	20 23	1 2	Available	3	CLINTON ELEMENTARY	Food Preparation...	585-555-1212
11111-001	Birds Eye	22 23	1 2	Available	8	Heartland Middle School	Food Preparation...	585-555-8743

At the bottom right of the interface, there are buttons for 'Deactivate' (red), 'Cancel' (blue), and 'Save' (green).

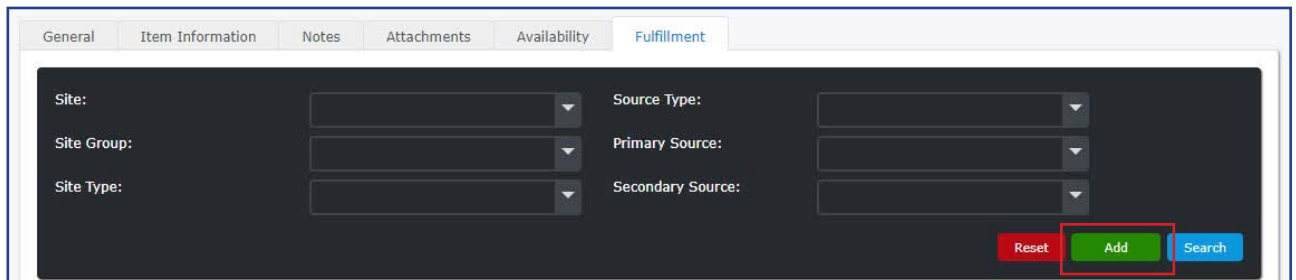
## Fulfillment Tab

The Fulfillment tab allows you to identify the primary and secondary fulfillment sources for products by site type, site group, or site. This information is then used when processing requisition orders to determine the appropriate source of the products.

### Add Fulfillment

Perform the following procedure to add a fulfillment source record.

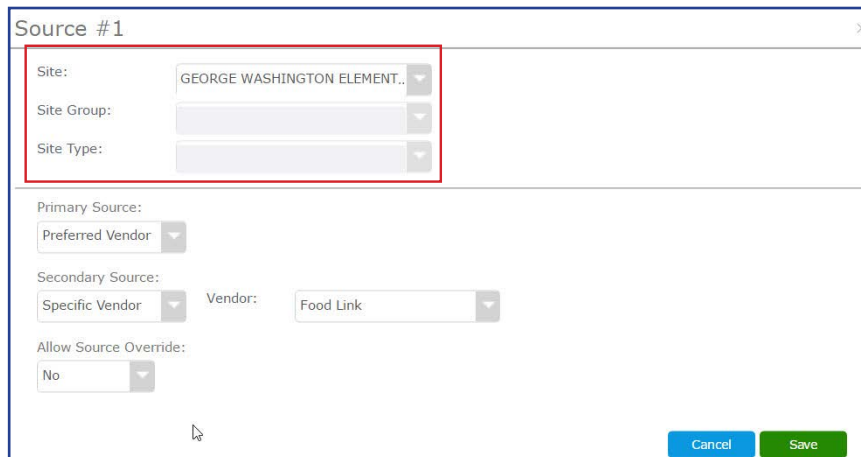
1. From the left-hand navigation bar, click **Products**.
2. Click **Maintenance**.
3. Select your search criteria.  
**Note:** The filters can be left blank to display all products in the search results.
4. Click **Search**.
5. Click the hyperlink in the **Product #** column to open the product.
6. Click the **Fulfillment** tab.
7. Click **Add**.



8. Select either a **Site**, **Site Group**, or **Site Type**.

The following source options are available within the Primary and Secondary Source drop-downs. Review the descriptions to determine the appropriate source selection.

Source	Description
Preferred Vendor	The system will use Price Lists to automatically identify the vendor with the lowest price as the source for the product.
Specific Vendor	Allows you explicitly define the vendor to fulfill the product, regardless of price list.
Within District	Allows you to define an internal source site to fulfill the product



9. Select the appropriate source from the Primary Source drop-down.
  - a. If you select **Specific Vendor**, choose the appropriate vendor from the Vendor drop-down.
  - b. If you select **Within District**, choose the appropriate type from the Site Type drop-down.
10. If desired, select the appropriate source from the Secondary Source drop-down.
  - a. If you select **Specific Vendor**, choose the appropriate vendor from the Vendor drop-down.
  - b. If you select **Within District**, choose the appropriate type from the Site Type drop-down.
11. Select **Yes** or **No** from the Allow Source Override drop-down.

Selecting **Yes** allows the user requesting product from requisition to override designated primary and secondary source.

Selecting **No** prevents the user requesting product from requisition to override designated primary and secondary source.
12. Click **Save**.

The screenshot shows a form titled "Source #1" with a close button (X) in the top right corner. The form contains several fields:

- Site:** A dropdown menu with "GEORGE WASHINGTON ELEMENT.." selected.
- Site Group:** A dropdown menu.
- Site Type:** A dropdown menu.
- Primary Source:** A dropdown menu with "Preferred Vendor" selected.
- Secondary Source:** A dropdown menu with "Specific Vendor" selected, and a **Vendor:** dropdown menu with "Food Link" selected.
- Allow Source Override:** A dropdown menu with "No" selected.

At the bottom right of the form, there are two buttons: "Cancel" (blue) and "Save" (green). A red box highlights the Primary Source, Secondary Source, and Allow Source Override sections. A mouse cursor is visible over the "Save" button.

## Edit Fulfillment

Perform the following procedure to edit a fulfillment record.

1. From the left-hand navigation bar, click **Products**.
2. Click **Maintenance**.
3. Select your search criteria.

**Note:** The filters can be left blank to display all products in the search results.
4. Click the hyperlink in the **Product #** column to open the product.
5. Click **Search**.
6. Click **Fulfillment** tab.
7. Select your search criteria.

**Note:** The filters can be left blank to display all sources in the search results.
8. Click **Search**.
9. Click the hyperlink in the **Source #** column to open the fulfillment source.
10. Perform the appropriate edits.
11. Click **Save**.

## Remove a Fulfillment Source

Perform the following procedure to delete a fulfillment source.

1. From the left-hand navigation bar, click **Products**.
2. Click **Maintenance**.
3. Select your search criteria.  
**Note:** The filters can be left blank to display all products in the search results.
4. Click the hyperlink in the **Product #** column to open the product.
5. Click **Search**.
6. Click **Fulfillment** tab.
7. Select your search criteria.  
**Note:** The filters can be left blank to display all sources in the search results.
8. Click **Search**.
9. Click the hyperlink in the **Source #** column to open the fulfillment source.
10. Select the appropriate check box. If you would like to remove all records click the Select All check box.
11. Click **Remove**.

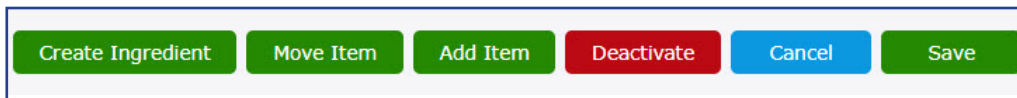
<input type="checkbox"/>	Source # ^	Site	Site Group	Site Type	Primary Source Type	Primary Source	Secondary Source Type	Secondary So...	Allow Override
<input type="checkbox"/>	1	GEORGE WASH...			Preferred Vendor		Specific Vendor	Food Link	No
<input checked="" type="checkbox"/>	2			Administration	Specific Vendor	Blue Bell	Within District	Elmgrove Rd MI...	Yes

12. At the warning prompt, click **Yes**.
13. Click **Save**.

## Additional Ingredient Maintenance Options

Additional options are available to assist with maintaining products in your database.

**Note:** Depending on permissions, you may not be able to perform all tasks.



### Create Ingredient

Allows you to create an ingredient directly from a product without having to navigate through the system. During the creation process, the following fields are copied over where they exist: Manufacturer, Manufactured Product Number, Brand, Purchase Unit Description, Commodity status, Commodity Fair Market Value, UPC Code, and Stock Units per Purchase Unit.

**Note:** Once created, the new ingredient will be linked to the product automatically.

1. From the left-hand navigation bar, click **Products**.
2. Click **Maintenance**.
3. Enter the Product # or Description into the Search field and click **Search**.



# PRODUCTS

4. Click the **Product #** hyperlink in the left column or double click the Description.
5. Click **Create Ingredient** at the bottom of the screen.

General | **Item Information** | Notes | Attachments | Availability | Fulfillment

Item Number: 001 Status: Available

Manufacturer: [Dropdown] Commodity: No

Manufacturer Product Number: 12345 Commodity Fair Market Value: [Text]

Brand: SARAH LEE Default Purchase Unit Price: 20.0000

Purchase Unit Description: CASE 6/BAGS Purchase Unit UPC Code: 12345

Purchase Unit Weight: 10 Pounds Stock Unit UPC Code: 54321

Stock Unit Description: BAG 30 COUNT Stock Units per Purchase Unit: 6

Exclude from Usage: No

Price Lists Status Filter: [Dropdown]

List #	Description	Vendor	Vendor Pr...	Start Date	End Date	Commodity Processing Fee	Purchase Unit Price	Status
1	Sysco	Sysco	87765	7/1/2016	12/31/2021		18.0000	In Use

[Red Box: Create Ingredient]

6. The Ingredient Maintenance screen will open to the General tab. Review the prefilled information for accuracy and complete any additional fields.
7. Use the drop-down menu to select a **Classification**.  
**Note:** If all required fields are not completed upon attempting to save, you will be notified to correct each field.

Home > Ingredients > Ingredient Search > Edit : 990356 - Del Monte Beans

General | Measurement | Nutrients | Allergens | Purchase Info | Attachments

Ingredient #: 990356

Description: Del Monte Beans Classification: Vegetable

Source: LOCAL

Linked Product: 10169 - Del Monte Beans Clear Link Yield Factor: 100 %

Cancel Save

# PRODUCTS

- Click on the **Nutrients** tab.
- Enter a **Base Weight**. Use the drop-down menu to establish the weight type (g, lbs, oz). You may also enter Nutrient Values; however, they are not required in order to save.
- Complete any additional information in the Measurement, Allergen, and Attachments tabs.
- Once you have completed all necessary actions, click **Save**.

Home > Ingredients > Ingredient Search > Edit : 990356 - Del Monte Beans

General: **The Base Weight field is required. The Unit Of Measure field is required.** Purchase Info Attachments

Base Weight:  (0 g)

Trans Fat is tracked for informational purposes only  
i Denotes required nutrient values  
\*N/A\* Denotes Missing Nutrient Values

Nutrient Value		Nutrient Value/100g		Nutrient Value		Nutrient Value/100g			
Calories:	25	*N/A*		Sugars:	3 g	*N/A*	g		
Total Fat:	*N/A*	g	*N/A*	g	Protein:	*N/A*	g		
Saturated Fat:	*N/A*	g	*N/A*	g	Vitamin A:	190 IU	*N/A*	IU	
Trans Fat:	*N/A*	g	*N/A*	g	Vitamin C:	4 mg	*N/A*	mg	
Cholesterol:	*N/A*	mg	*N/A*	mg	Calcium:	2 mg	*N/A*	mg	
Sodium:	55 mg	*N/A*	mg	mg	Iron:	4 mg	*N/A*	mg	
Carbohydrate:	6 g	*N/A*	g	g	Water:	*N/A*	g	*N/A*	g
Dietary Fiber:	2 g	*N/A*	g	g	Ash:	*N/A*	g	*N/A*	g

Cancel Save

- A confirmation window will appear notifying you the new Product has been saved.

Heartland School Solutions

Ingredient saved successfully

Home > Products > Maintenance

Product # or Description:  Active: Yes

Product Category:  Needs Attention:

Usage Category:  UPC Code:

manager

13. You may now locate the product in the Product: Maintenance screen.

Home > Ingredients > Ingredient Search

Ingredient # or Description: del  
 CN Code:  
 Product Number:  
 Classification:  
 UPC Code:

Commodity/Recipe Code:  
 Source:  
 Manufacturer:  
 Active: Yes

Reset Add Search

Ingredient #	Description ^	Source	Class	CN Code	Manufacturer	Product #	Comm/Rec Code	Commodity	Acti
<a href="#">990356</a>	Del Monte Beans	LOCAL	Veget...					No	Yes
<a href="#">51395</a>	HARVEST DELIGHT	USDA	Meals...	51395			I-21r	No	Yes
<a href="#">799951</a>	TURKEY, BREAST, DELI-STYLE, SMOKED, COOKED	LOCAL	Poultr...					No	Yes

Page 1 of 1 125 items per page 3 items found maximum items: 250

## Move Item

Allows you to move an item from one product to another.

**Note:** In order to move an item from one product to another product, multiple items must exist.

**Note:** In order to move an item from one product to another product, items must be assigned the same Site Group. If multiple sites groups exist, the item will only appear in the matching site group(s).

1. From the left-hand navigation bar, click **Products**.
2. Click **Maintenance**.
3. Enter the Product # or Description into the Search field and click **Search**.
4. Click the **Product #** hyperlink in the left column or double click the Description.
5. Click **Move Item** at the bottom of the screen.

Home > Products > Maintenance > Edit : 1531-002, Peaches, Frozen IQF

General Item Information Notes Attachments Availability Fulfillment

Item Number: 002 Status: Available  
 Manufacturer: American Home Foods Commodity: No  
 Manufacturer Product Number: 99887 Commodity Fair Market Value:  
 Brand: Default Purchase Unit Price: \* 13.45  
 Purchase Unit Description: \* Case/ 72 /Each 4.5oz UPC Code:  
 Purchase Unit Weight: \* 1 Ounces Stock Units per Purchase Unit: \* 72  
 Stock Unit Description: \* 1 Package

Price Lists Status Filter:

List #	Description	Vendor	Vendor Product #	Start Date	End Date	Commodity Processing Fee	Purchase Unit Price	Status
--------	-------------	--------	------------------	------------	----------	--------------------------	---------------------	--------

Create Ingredient Move Item Add Item Deactivate Cancel Save

# PRODUCTS

- The product search screen will appear. Enter information in the available fields or you may leave them blank. Then, click **Search**.

Product # or Description:

Product Category:

Usage Category:

Storage Category:

Active: Yes

Needs Attention:

UPC Code:

**Search**

Product #	Description ^
-----------	---------------

Items can only be moved to Products within the same Site Group assignment.

**Cancel** **Continue**

- Select the item from the list of available items. Then, click **Continue**.

Product # or Description:

Product Category:

Usage Category:

Storage Category:

Active: Yes

Needs Attention:

UPC Code:

**Search**

Product #	Description ^
1315	Omelet, Cheese Individually wrapped
2516	Pan Spray, Butter Flavored
1216	Pancake, Mini, WG
<b>10168</b>	<b>Peaches</b>
2817	Pimentos, Red, Unpeeled, Diced
1107	Pizza Breakfast, WG
1108	Pizza, Mexican, WG

Items can only be moved to Products within the same Site Group assignment.

**Cancel** **Continue**

- A Warning window will appear to confirm moving the item. Click **Yes** to continue with the process.

**Warning** !

You are about to move this item to a different product. Do you wish to continue?

**Yes** **No**

- A confirmation window will appear notifying you the item has been moved successfully.

**Product Item 1531-002 moved to product 10168 successfully**

# PRODUCTS

## Add Item

You may have one item per product or you can add several items if you want to group similar items that differ in brand and/or pack size.

1. From the left-hand navigation bar, click **Products**.
2. Click **Maintenance**.
3. Select your search criteria.  
**Note:** The filters can be left blank to display all products in the search results.
4. Click **Search**.
5. Click the hyperlink in the **Product #** column to open the product.
6. Click **Add Item**.
7. Enter the required item information. Refer to the Item Information and Price List (if applicable) topics for field descriptions.
8. Click **Save**.

Home > Products > Maintenance > Edit : 39005-001, Del Monte

General | **Item Information** | Notes | Availability

Manufacturer: Del Monte Quality | Status: Available  
Manufacturer Product Number: 39005 | Commodity: No  
Brand: Del Monte | Commodity Fair Market Value:  
Purchase Unit Description: Case | Default Purchase Unit Price: 3.50  
Purchase Unit Weight: 101 Ounces | UPC Code:  
Stock Unit Description: can#10 | Stock Units per Purchase Unit: 6

Price Lists | Status Filter:

List #	Description	Vendor	Vendor Product #	Start Date	End Date	Commodity Processing Fee	Purchase Unit Price	Status
20		US Foods	USF157989	9/2/2016	9/2/2017		52.50	In Use
22		Sunrise Produce	SRP89444	9/2/2016	9/2/2017		42.50	In Use
25		Sysco	SYS-58697	9/2/2016	9/2/2017		41.45	In Use

Add Item Deactivate Cancel Save

## Deactivate/Activate

Click **Deactivate** when you no longer want the item to be used.

Click **Activate** when you want the item to be used.

**Note:** A product is considered inactive when all its items are inactive.

# PRODUCTS

## Categories

Product categories are assigned to products and can be used to filter product searches and reports. System categories are provided with the software and cannot be modified. You can add, edit descriptions, view, and delete product categories created by users. The user must be assigned to the appropriate **Products - Categories** security group settings to manage categories. Please refer to the Setup section to provide users the appropriate access to categories.

## Search Results Navigation

The search result grid conveniently displays the number of product categories found. When your search grid presents more items than can display on one page, you can use the paging controls to navigate through the results. Additionally, you can adjust the items per page by selecting the desired value from the Items per Page drop-down.

Home > Products > Categories

Abbreviation or Description:

Type:

Source:

Reset Add Search

61 Items Found Items per Page 20

Abbreviation	Description	Type	Source
<a href="#">BAKE_DR</a>	Bakery, Dry	Product	System
<a href="#">BAKE_FR</a>	Bakery, Fresh	Product	System
<a href="#">BAKE_FZ</a>	Bakery, Frozen	Product	System
<a href="#">BEANS_CN</a>	Beans, Canned	Product	System
<a href="#">BEAN_FR</a>	Beans, Fresh	Product	System
<a href="#">BEANS_FZ</a>	Beans, Frozen	Product	System
<a href="#">BEV_CN</a>	Beverages, Canned	Product	System
<a href="#">BEV_FR</a>	Beverages, Fresh	Product	System

<< < 1 2 3 4 > >>

## Add Categories

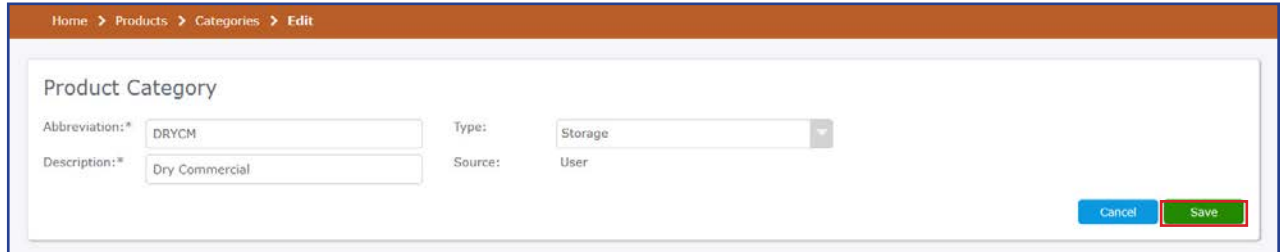
1. From the left-hand navigation bar, click **Products**.
2. Click **Categories**.
3. Click **Add**.
4. Type a new abbreviation and description in the appropriate fields. The abbreviation must be unique and has a ten character limit.

# PRODUCTS

- From the Type drop-down, select an appropriate type. You have three choices for the category type, each of which is meant to answer a different question. The Product type should be chosen if the category is meant to differentiate products from each other. The Usage type deals with how the product will be used. Finally, the Storage type addresses where the product is typically stored.

**Note:** Required fields are denoted by an asterisk \*.

- Click **Save**.

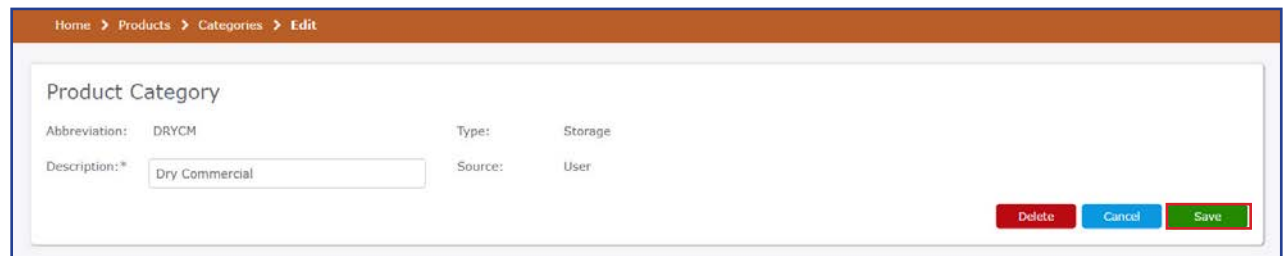


- Upon completion the **Category Successfully Saved** prompt displays.

Category saved successfully

## Modifying a Category Description

- From the left-hand navigation bar, click **Products**.
- Click **Categories**.
- Enter a specific abbreviation or description or leave the field blank for all categories.
- Click **Search**. The results grid displays.
- Click the Abbreviation hyperlink, or double-click the desired row.
- Edit the description.
- Click **Save**.



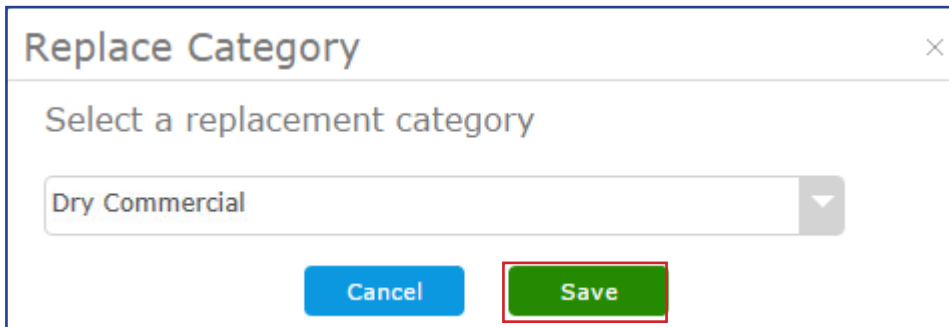
- Upon completion the **Category Successfully Saved** prompt displays.

Category saved successfully

## Deleting Categories

You may delete a user category as long as it is not assigned to a product. System categories cannot be deleted.

1. From the left-hand navigation bar, click **Products**.
2. Click **Categories**.
3. Enter a specific abbreviation or description or leave the field blank for all categories.
4. Click **Search**. The results grid displays.
5. Click the Abbreviation hyperlink, or double-click the desired row.
6. Click **Delete**.
7. At the confirmation prompt, click **Yes**.
8. If the category is assigned to a product, you will need to select a replacement category of the same type and then click **Save**.



Replace Category

Select a replacement category

Dry Commercial

Cancel Save

9. Upon completion the **Category Deleted Successfully** prompt displays.

Category deleted successfully



## Price Lists

Price lists allows you to add item pricing information for a vendor. You can add, edit descriptions, view, and delete product categories created by users. The user must be assigned to the appropriate **Products - Price** security group settings to manage Price Lists. Please refer to the Setup section to provide users the appropriate access to price lists. If desired, select the appropriate price list status (Expired, In Use, Scheduled, or Deactivated) to filter the price list results. The status is determined by the start and end dates. You can add multiple products to a price list.

## Search Results Navigation

The search result grid conveniently displays the number of price lists found. When your search grid presents more items than can display on one page, you can use the paging controls to navigate through the results. Additionally, you can adjust the items per page by selecting the desired value from the Items per Page drop-down.

Home > Products > Price Lists

Price List # or Description:  Start Date:

Vendor:  End Date:

Price List Status:

Reset Add Search

7 Items Found Items per Page 20

List #	Description	Vendor	Start Date	End Date	Price List Status
1	Sysco	Sysco	7/1/2016	6/30/2017	Expired
2	Dairy Products	Wawa Dairy	7/1/2015	6/30/2016	Deactivated
3	Dairy Products	Wawa Dairy	7/1/2016	10/11/2016	Expired
4	US FOODS	US Foods	10/31/2016	7/1/2017	Expired
5	test	Moo Moo dairy	11/8/2016	11/8/2017	In Use
6	Test Price List	TEST Vendor	11/10/2016	8/31/2017	In Use
7	Test	Cooler 2 @ Adams Eleme...	6/20/2017	6/20/2017	Expired

<< < 1 > >>

## Adding a Price List

Perform the following procedure to add a price list.

1. From the left-hand navigation bar, click **Products**.
2. Click **Price Lists**.
3. Click **Add**.
4. Type a descriptive entry in the Description field.
5. Select a vendor from the Vendor drop-down.
6. Check **Always update price on receiving records** if you would like the product prices entered on the price list to update on uncommitted receiving records.
7. Select the start and end dates to identify the time range for which the pricing is effective (required). Start and end dates determine the Status (Scheduled - Future, In Use - Current, Expired - Past). The Start Date defaults to the current date. The End Date *must* be entered before you can save the price list.

# PRODUCTS

- When adding products to the price list, you have the ability to search on different fields. Click **Search** and then select a check box to remove or add the field you would like included in your search. The default search includes all fields. If you leave the Price Lists Edit screen the search resets and all check boxes are selected.

**All fields included:**

Products Included

Search  within Product #, Description, Brand, Vendor

Include fields:

- Product #
- Description
- Brand
- Vendor Product #

**Only Product # and Description fields included:**

Products Included

Search  within Product #, Description

Include fields:

- Product #
- Description
- Brand
- Vendor Product #

- Enter a product #, description, brand, or vendor product # in the Search field, and then click the product to add it to the price list.
- Enter the **Vendor Product #**.
- If applicable, enter the **Commodity Processing Fee**.
- Enter the **Price per Unit**. Defaults to zero if not entered.
- If desired, type a note in the Comment field.
- Click **Save**.

Description:  Start Date:

Vendor:  End Date:

Status:

Always update price on receiving records

Products Included

Search  within Product #, Description, Brand, Vendor Product #

Product Item #	Description	Brand	Vendor Product #	Quantity per Purchase Unit	Commodity Processing Fee	Price per Purchase Unit
088-001	Chocolate Milk FF Mo...	MooMoo Dairy	MMD-1145-C	50 Carton per case 5...		50.0000
23-001	Strawberry Milk FF M...	Moo Moo	23456	50 carton per 50 ct		50.0000
1085-002	MILK, NONFAT, FLUID, ...	Mooove Milk	MMD-1144	50 carton per case		45.0000

Comment:

## Modify Price Lists

Perform the following procedure to modify price list information.

1. From the left-hand navigation bar, click **Products**.
2. Click **Price Lists**.
3. Select your search criteria. **Note:** The filters can be left blank to display all products in the search results.
4. Click **Search**.
5. Click the hyperlink in the **List #** column to open the price list.
6. Modify the price list. You can change the start and end dates to update the status, and you may check **Always update price on receiving records** if you would like the product prices entered on the price list to update on uncommitted receiving records.
7. Click **Save**.

Description:  Start Date:

Vendor:  End Date:

Status:

Always update price on receiving records

**Products Included**

within Product #, Description, Brand, Vendor Product #

<input type="checkbox"/>	Product Item #	Description	Brand	Vendor Product #	Quantity per Purchase Unit	Commodity Processing Fee	Price per Purchase Unit
<input type="checkbox"/>	02-001	ROLLS, HAMBURGER ...	SARAH LEE	<input type="text" value="87765"/>	6 BAG 30 COUNT per...		<input type="text" value="18.0000"/>
<input type="checkbox"/>	03-001	CORN, CANNED YELL...	LIBBY	<input type="text" value="98756"/>	6 #10 CAN per CASE...		<input type="text" value="12.5400"/>
<input type="checkbox"/>	1042-001	CHEESE,PAST PROCE...	Land O Lakes	<input type="text" value="42334"/>	4 Carton (160 slices) ...	<input type="text"/>	<input type="text" value="10.3600"/>
<input type="checkbox"/>	1082-001	MILK,LOWFAT,1%	Hiland	<input type="text" value="33491"/>	50 Carton per Case 5...		<input type="text" value="10.6500"/>
<input type="checkbox"/>	1085-001	MILK,NONFAT,FLUID,...	Hiland	<input type="text" value="54561"/>	50 Carton per Case 5...		<input type="text" value="15.9900"/>

Comment:

## Removing a Product from a Price List

To remove a product from a price list, select the check box and click **Remove**. The Remove button is not enabled unless a check box is selected.

**Products Included**

Search  within Product #, Description, Brand, Vendor

Product #

<input type="checkbox"/>	Product Item #	Description	Brand	Vendor Product #	Quantity per Purchase Unit	Commodity Processing Fee	Price per Purchase Unit
<input checked="" type="checkbox"/>	124567-001	Peanuts	Peanuts	22231	1 each per case		1.00
<input type="checkbox"/>	33334-001	Baked Chips	Baked Lays	4425	100 Bag per CS(100)		14.66
<input type="checkbox"/>	1175-002	Fat Free Fudge bar	fudge bar---fat free	12321	50 box per box(50)		16.99
<input type="checkbox"/>	1175-001	Fat Free Fudge bar		FB-22585	60 EACH per CS(60)		16.99

**Remove**      Comment:

To remove all products from a price list, select the header check box and click **Remove**.

**Products Included**

Search  within Product #, Description, Brand, Vendor

Product #

<input checked="" type="checkbox"/>	Product Item #	Description	Brand	Vendor Product #	Quantity per Purchase Unit	Commodity Processing Fee	Price per Purchase Unit
<input checked="" type="checkbox"/>	124567-001	Peanuts	Peanuts	22231	1 each per case		1.00
<input checked="" type="checkbox"/>	33334-001	Baked Chips	Baked Lays	4425	100 Bag per CS(100)		14.66
<input checked="" type="checkbox"/>	1175-002	Fat Free Fudge bar	fudge bar---fat free	12321	50 box per box(50)		16.99
<input checked="" type="checkbox"/>	1175-001	Fat Free Fudge bar		FB-22585	60 EACH per CS(60)		16.99

**Remove**      Comment:

## Deactivate/Activate Price Lists

Perform the following procedure to deactivate or activate the price lists.

1. From the left-hand navigation bar, click **Products**.
2. Click **Price Lists**.
3. Click **Search**. The results grid displays.
4. Click the List # hyperlink.
5. Click **Deactivate** or **Activate**.
6. Upon completion the **Price List Deactivated/Activated** prompt displays.

Copy
Deactivate
Cancel
Save

# PRODUCTS

## Copying Price Lists

A price list that has been saved can then be copied into a duplicate price list. This allows for easy creation of similar price lists.

Perform the following procedure to copy a price list.

1. From the left-hand navigation bar, click **Products**.
2. Click **Price Lists**.
3. Select your search criteria. **Note:** The filters can be left blank to display all products in the search results.
4. Click **Search**.
5. Click the hyperlink in the **List #** column to open the price list.
6. Click **Copy**.

The screenshot shows the 'Products Included' section of a software interface. At the top, there are search filters for Description (Sysco), Vendor (Sysco), Status (In Use), Start Date (6/19/2019), and End Date (7/1/2020). A checkbox for 'Always update price on receiving records' is checked. Below the filters is a search bar and a table of products. The table has columns for Product Item #, Description, Brand, Vendor Product #, Quantity per Purchase Unit, Commodity Processing Fee, and Price per Purchase Unit. The 'Copy' button at the bottom right is highlighted with a red box.

Product Item #	Description	Brand	Vendor Product #	Quantity per Purchase Unit	Commodity Processing Fee	Price per Purchase Unit
02-001	ROLLS, HAMBURGER ...	SARAH LEE	87765	6 BAG 30 COUNT per...		18.0000
03-001	CORN, CANNED YELL...	LIBBY	98756	6 #10 CAN per CASE...		12.5400
1042-001	CHEESE,PAST PROCE...	Land O Lakes	42334	4 Carton (160 slices) ...		10.3600
1082-001	MILK,LOWFAT,1%	Hiland	33491	50 Carton per Case 5...		10.6500
1085-001	MILK,NONFAT,FLUID,...	Hiland	54561	50 Carton per Case 5...		15.9900

7. Edit the duplicated price list.  
**Note:** You must enter a new End Date before saving the copied price list.
8. When finished, click **Save**.

The screenshot shows the 'Products Included' section after a price list has been duplicated. The 'Start Date' is now 3/12/2020 and the 'End Date' is blank. A yellow label 'Duplicated Price List' is visible above the 'Status' field. The 'Save' button at the bottom right is highlighted with a red box.

Product Item #	Description	Brand	Vendor Product #	Quantity per Purchase Unit	Commodity Processing Fee	Price per Purchase Unit
02-001	ROLLS, HAMBURGER ...	SARAH LEE	87765	6 BAG 30 COUNT per...		18.0000
03-001	CORN, CANNED YELL...	LIBBY	98756	6 #10 CAN per CASE...		12.5400
1042-001	CHEESE,PAST PROCE...	Land O Lakes	42334	4 Carton (160 slices) ...		10.3600
1082-001	MILK,LOWFAT,1%	Hiland	33491	50 Carton per Case 5...		10.6500
1085-001	MILK,NONFAT,FLUID,...	Hiland	54561	50 Carton per Case 5...		15.9900

## Product Groups

Product groups provide you the ability to define a collection of items, and assist with products that are typically received together within transaction, or processed within a transaction. For example, you can create a product group for your paper goods and when you create an instant receipt you will be able to efficiently add the paper goods instead of searching for each item individually. You can add, edit descriptions, view, and delete product groups. The user must be assigned to the appropriate **Products - Product Groups** security group settings to manage Product Groups. Please refer to the Setup section to provide users the appropriate access to product groups.

## Search Results Navigation

The search result grid conveniently displays the number of product groups found. When your search grid presents more items than can display on one page, you can use the paging controls to navigate through the results. Additionally, you can adjust the items per page by selecting the desired value from the Items per Page drop-down.

Home > Products > Product Groups

Product Group Name:

Site:

Site Group:

Reset Add Search

5 Items Found Items per Page 20

Product Group Name	Site/Site Group	Number of Items
<a href="#">Mosaic_Test</a>	All Sites	3
<a href="#">Produce</a>	Adams Elementary	1
<a href="#">Produce</a>	T Jefferson Elementary	1
<a href="#">Supplies</a>	All Sites	2
<a href="#">WK 1/Cycle 1</a>	All Sites	5

<< < 1 > >>

## Adding a Product Group

Perform the following procedure to add a product group.

1. From the left-hand navigation bar, click **Products**.
2. Click **Product Groups**.
3. Click **Add**.
4. Type a unique name in the Product Group Name field.
5. To make the product group available to users that are assigned to a particular site, select a Site from the Site drop-down.
6. To make the product group available to users that are assigned to a particular site group, select a Site Group from the Site Group drop-down.

# PRODUCTS

- When adding products to the product group, you have the ability to search on different fields. Click **Search** and then select a check box to remove or add the field you would like included in your search. The default search includes all fields. If you leave the Product Group edit screen the search resets and all check boxes are selected.

**Note:** The search results are filtered based on products that are assigned to the sites and/or site groups you've selected.

**All fields included:**

Products Included

Search  within Product #, Description, Brand, Vendor

Include fields:

- Product #
- Description
- Brand
- Vendor Product #

**Only Product # and Description fields included:**

Products Included

Search  within Product #, Description

Include fields:

- Product #
- Description
- Brand
- Vendor Product #

- Enter a product #, description, manufacturer, or brand in the Search field, and then click the product to add it to the product group. Repeat to add multiple items.

Home > Products > Product Groups > Edit

Product Group Name:

Site:

Site Group:

Products Included

Search  within Product #, Description, Manufacturer, Brand

	Product Item Numb...	Manufacturer	Description	Brand	Quantity per Purchase Unit	Commodity	Active
<input type="checkbox"/>	1000-001		Hot Pockets	Hot Pocket	100 EACH per CS(10...	No	Yes
<input type="checkbox"/>	1658-001		French Fries	Idaho Potato Fries	5 BAG(5lbs) per CS(...	Yes	Yes
<input checked="" type="checkbox"/>	50212-001		BAKED FRENCH TOA...	Frenchies French Toa...	100 Boxes per CS(10...	No	Yes

# PRODUCTS

- If desired, type a note in the Comment field.
- Click **Save**.

Home > Products > Product Groups > Edit

Product Group Name: Elementary Orders

Site:

Site Group: Elementary Sites x

Products Included

Search Search Products... within Product #, Description, Manufacturer, Brand

Product Item Numb...	Manufacturer	Description	Brand	Quantity per Purchase Unit	Commodity	Active
1000-001		Hot Pockets	Hot Pocket	100 EACH per CS(10...	No	Yes
1658-001		French Fries	Idaho Potato Fries	5 BAG(5lbs) per CS(...	Yes	Yes
50212-001		BAKED FRENCH TOA...	Frenchies French Toa...	100 Boxes per CS(1...	No	Yes

Remove Import

Comment:

Cancel Save

- Upon completion the **Product Group Saved Successfully** prompt displays.



# PRODUCTS

## Import (Optional)

You have the ability to add items offered from your vendors by using the Import feature. This allows you to easily populate the product information within a product group, so that you won't have to enter products one at a time. Perform the following procedure to import items from a vendor.

1. Click **Import**.

The screenshot shows the 'Edit Product Group' interface. At the top, there is a breadcrumb trail: Home > Products > Product Groups > Edit. Below this, there are input fields for 'Product Group Name' (containing 'Elementary Orders'), 'Site', and 'Site Group' (containing 'Elementary Sites'). The main section is titled 'Products Included' and features a search bar with a dropdown arrow and the text 'Search Products...' and 'within Product #, Description, Manufacturer, Brand'. Below the search bar is a table with the following data:

<input type="checkbox"/>	Product Item Num...	Manufacturer	Description	Brand	Quantity per Purchase Unit	Commodity	Active
<input type="checkbox"/>	1000-001		Hot Pockets	Hot Pocket	100 EACH per CS(10...	No	Yes
<input type="checkbox"/>	1658-001		French Fries	Idaho Potato Fries	5 BAG(5lbs) per CS(...	Yes	Yes
<input checked="" type="checkbox"/>	S0212-001		BAKED FRENCH TOA...	Frenchies French Toa...	100 Boxes per CS(1...	No	Yes

At the bottom of the table, there are two buttons: 'Remove' and 'Import'. The 'Import' button is highlighted with a red box. To the right of the 'Import' button is a 'Comment:' field. At the bottom right of the interface, there are 'Cancel' and 'Save' buttons.

2. From the Vendor drop-down, select the appropriate Vendor.
3. Select the check box, and then click **Select**.

The screenshot shows the 'Vendor Price Lists' dialog box. At the top, there is a 'Vendor:' dropdown menu with 'US Foods' selected. Below this is a table with the following data:

<input type="checkbox"/>	Vendor	Price List Description	Start Date	End Date	# of Items
<input checked="" type="checkbox"/>	US Foods	US Foods	9/2/16	9/2/17	9

At the bottom right of the dialog box, there are 'Cancel' and 'Select' buttons. The 'Select' button is highlighted with a red box.

4. Repeat steps 1 - 3 to import items from multiple vendors.

## Modify a Product Group

Perform the following procedure to modify a product group.

1. From the left-hand navigation bar, click **Products**.
2. Click **Product Groups**.
3. The search filters can be left blank to display all product groups, or if desired use the filters to reduce your results.
  - a. If desired, type a unique name in the Product Group Name field.
  - b. If desired, select a Site from the Site drop-down.
  - c. If desired, select a Site Group from the Site Group drop-down.
4. Click **Search**.
5. Click the hyperlink in the Product Group Name column to open the product group.

Product Group Name	Site/Site Group	Number of Items
<a href="#">Elementary Frozen Order</a>	Elementary Sites	3
<a href="#">Elementary Order</a>	Elementary Sites	9

6. Perform the necessary changes.
7. To remove an item from the product group, select the check box, and then click **Remove**.

Product Item Num...	Manufacturer	Description	Brand	Quantity per Purchase Unit	Commodity	Active
<input checked="" type="checkbox"/> 50212-001		BAKED FRENCH TOA...	Frenchies French Toa...	100 Boxes per CS(1...	No	Yes
<input type="checkbox"/> 1000-001		Hot Pockets	Hot Pocket	100 EACH per CS(10...	No	Yes
<input type="checkbox"/> 1658-001		French Fries	Idaho Potato Fries	5 BAG(5lbs) per CS(...	Yes	Yes

8. Click **Save**.

## Deleting a Product Group

Perform the following procedure to delete a product group.

1. From the left-hand navigation bar, click **Products**.
2. Click **Product Groups**.
3. The search filters can be left blank to display all product groups, or if desired use the filters to reduce your results.
  - a. If desired, type a unique name in the Product Group Name field.
  - b. If desired, select a Site from the Site drop-down.
  - c. If desired, select a Site Group from the Site Group drop-down.
4. Click **Search**.
5. Click the hyperlink in the Product Group Name column to open the product group.

Home > Products > Product Groups > Edit : Elementary Frozen Order

Product Group Name:

Site:

Site Group:

Products Included

Search Products... within Product #, Description, Manufacturer, Brand

<input type="checkbox"/>	Product Item Num...	Manufacturer	Description	Brand	Quantity per Purchase Unit	Commodity	Active
<input type="checkbox"/>	50212-001		BAKED FRENCH TOA...	Frenchies French Toa...	100 Boxes per CS(1...	No	Yes
<input type="checkbox"/>	1000-001		Hot Pockets	Hot Pocket	100 EACH per CS(10...	No	Yes
<input type="checkbox"/>	1658-001		French Fries	Idaho Potato Fries	5 BAG(5lbs) per CS(...	Yes	Yes

Comment:

6. Click **Delete**.
7. The warning prompt displays, click **Yes**.
8. Upon completion the **Product Group Deleted Successfully** prompt displays.

# INVENTORY (MENU PLANNING ONLY USERS)

## Inventory (Menu Planning Only Users) Overview

The Inventory (Menu Planning Only Users) section is a condensed version of Inventory for users who only utilize the system for Mosaic Back of House Menu Planning. It gives you the ability to track items on hand by conducting a periodic inventory. The inventory is separated by site, and you can search through each site's inventory to update specific items. Any items you want to conduct a periodic inventory on will need to have Purchase Info added through the Ingredients tab. Please reference the **Ingredients** section of the manual for guidance.



## First Entering Inventory

To begin using the Inventory feature, you need to enter the counts for every item in your site's inventory. To do this, perform the following steps.

1. Use the **Inventory Worksheets** link to generate a list of items offered at a given site. To list all active items, select the given site and click **View**, leaving the other fields blank or at their default value.
2. Check for every item listed in Mosaic and record them as you go.
3. Once the inventory worksheet has been filled out, use the **Enter Physical Count** link.
4. Select only the associated site and click **Search**. This will list every item available in Mosaic, similar to the list on your inventory worksheet.
5. Use the numbers from the inventory worksheet to fill out the information on the Enter Physical Count page.

For more information on how each of these pages works, see the corresponding section in the following pages.

# INVENTORY (MENU PLANNING ONLY USERS)

## Enter Physical Count

The Enter Physical Count page is used to enter the on-hand count of items you have in inventory. You can use this page to update specific item counts by searching for the Ingredient # or Description, and you can sort items by their classification. You can also leave the criteria fields blank to update counts on all of the items in the inventory.

Note that you must select a Site in order to search for inventory items.

After entering criteria, click **Search** to locate the ingredient(s) you want to update. There are two Physical Count fields to update for each item: Purchase Unit (the larger unit that is shipped from suppliers) and Stock Unit (the smaller unit this is used to stock shelves). Make sure to update both counts when making changes to the inventory counts.

To reset search criteria so that you can search for a different item, click **Reset**.

The screenshot shows the 'Enter Physical Count' interface. At the top, there are search filters: 'Ingredient # or Description', 'Classification', 'Available as Commodity', and 'Site' (set to 'Adams Elementary'). There are 'Reset' and 'Search' buttons. Below the filters is a table with columns: 'Ing #', 'Description ^', 'Physical Count', 'Purchase Unit', 'Physical Count', and 'Stock Ur'. The table lists several items, including ALMONDS, APPLES (canned, raw), and APPICOTS. Each item has input fields for the two 'Physical Count' columns.

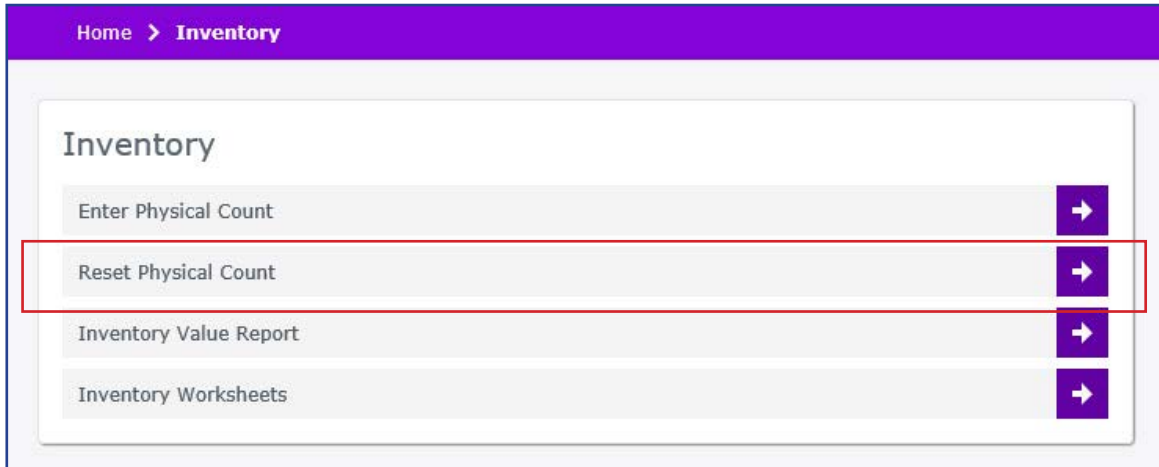
Ing #	Description ^	Physical Count	Purchase Unit	Physical Count	Stock Ur
12061	ALMONDS	<input type="text"/>	Case 4 Bags	<input type="text"/>	Bag (5#)
50356	APPLES, CANNED, UNSWEETENED, SLICED, IN WATER	<input type="text"/>	Case 6/#10	<input type="text"/>	#10 CAN
900037	APPLES,CND,H2O PK,SLCD,DRN	<input type="text"/>	Case 6/#10	<input type="text"/>	#10 CAN
901667	APPLES,CND,WATER PACK,SLCD	<input type="text"/>	Case	<input type="text"/>	#10 CAN
9003	APPLES,RAW,WITH SKIN	<input type="text"/>	case 10#	<input type="text"/>	medium
0026	APPICOTS CND LT CYBUB BK W/CKM COLBLOIDS	<input type="text"/>	Case 6/#10	<input type="text"/>	#10 CAN

# INVENTORY (MENU PLANNING ONLY USERS)

## Reset Physical Count

The Reset Physical Count feature allows you to reset all the physical counts of every item in a site's inventory to zero. You cannot undo this change, so make absolutely certain that you want to reset the inventory before confirming the change.

To reset a site's inventory, click **Reset Physical Count**.



A window will pop up. Select the site you would like to reset, or select **All Sites** to reset the inventory of every site in your district.

**You cannot undo this change. Make absolutely certain that you want to reset the inventory before clicking Yes.**

Confirm your selection by clicking **Yes**. The inventory of the selected site will be reset.



# INVENTORY (MENU PLANNING ONLY USERS)

## Inventory Value Report

Once you have entered counts for items in your inventory, you can run an Inventory Value report.

The Inventory Value report shows all of the items and the quantities that are shown in your on-hand physical counts. This report shows the quantity and value of all items based on the chosen filters. The Inventory Value report can be printed for a single site or for all sites into one consolidated value.

To generate an Inventory Value report, select a site, or select All Sites to include inventory from every site. If you want to search for specific inventory items, enter criteria in the Description, Ingredient #, and Classification fields. Choose whether you want to include items with a quantity of zero. You can sort the report by source and run it for active and inactive ingredients. When you have entered all the desired criteria, click **View**.

MOSAIC Inventory Value Report Consolidated								
Ing #	Description	Source	Physical Count	Purchase Unit	Physical Count	Stock Unit	Purchase Unit Cost	Inv. Value
12061	ALMONDS	USDA		Case 4 Bags		Bag (5#)	\$39.00	\$0.00
50356	APPLES, CANNED, UNSWEETENED, SLICED, IN WATER	USDA		Case 6/#10		#10 CAN	\$2.75	\$0.00
900037	APPLES,CND,H2O PK,SLCD,DRN	LOCAL		Case 6/#10		#10 CAN, drained	\$29.25	\$0.00
901667	APPLES,CND,WATER PACK,SLCD	LOCAL		Case		#10 CAN	\$15.75	\$0.00
9003	APPLES,RAW,WITH SKIN	USDA		case 10#		medium (3 per LB)	\$16.75	\$0.00
9026	APRICOTS,CND,LT SYRUP PK,W/SKN,SOL&LIQUIDS	USDA		Case 6/#10		#10 CAN	\$25.00	\$0.00
601476	BEEF FLAMEBROIL PATTY # 155-525 ADVANCE FOOD	LOCAL		Case (135ct)		SLEEVE (27ct)	\$31.25	\$0.00
23567	BEEF,GROUND,85% LN MEAT / 15% FAT,RAW	USDA		Case (4 Chubs)		Chub (10#)	\$95.00	\$0.00

# INVENTORY (MENU PLANNING ONLY USERS)

## Inventory Worksheets

The Inventory Worksheet is a blank worksheet you can print out so that you can hand-write the physical counts of items found in a site's inventory. You are only able to select one school site at a time. There are four different print options: by Class, Alphabetical, Numerical, and by USDA commodities.

To generate an Inventory Worksheet, select a site. If you want to search for specific inventory items, enter criteria in the Description, Ingredient #, and Classification fields. Choose whether you want to include items with a quantity of zero. You can sort the report by source and run it for active and inactive ingredients. When you have entered all the desired criteria, click **View**.

Note that there are two Physical Count fields to update for each item: Purchase Unit (the larger unit that is shipped from suppliers) and Stock Unit (the smaller unit this is used to stock shelves). Make sure to update both counts when recording on-hand counts.

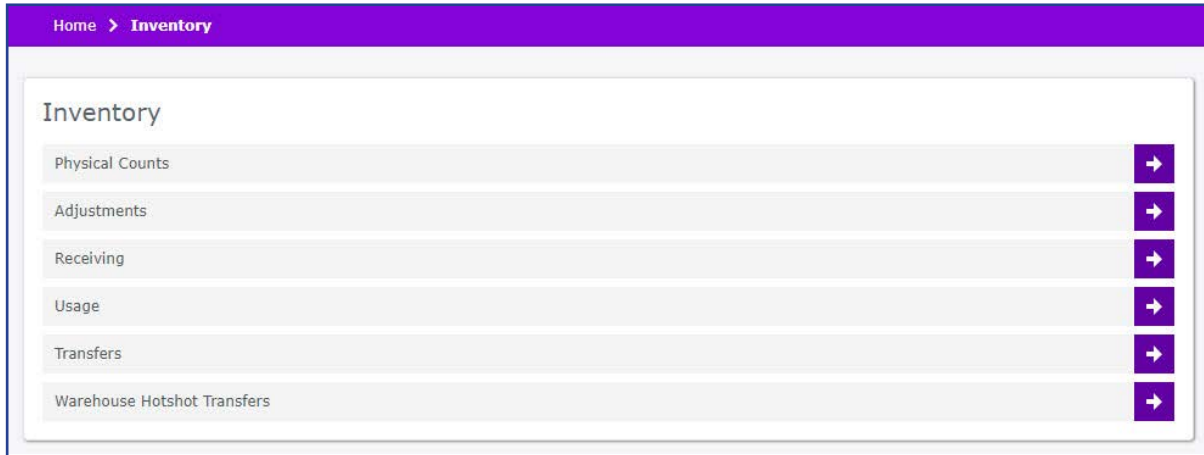
<p style="text-align: center;"><b>MOSAIC</b>  <b>Inventory Worksheet</b>  <b>Adams Elementary</b></p>								
Ing #	Description	Source	Physical Count	Purchase Unit	Physical Count	Stock Unit	Cost Change	Purchase Unit Cost
12061	ALMONDS	USDA		Case 4 Bags		Bag (5#)		\$39.00
50356	APPLES, CANNED, UNSWEETENED, SLICED, IN WATER	USDA		Case 6/#10		#10 CAN		\$15.00
900037	APPLES,CND,H2O PK,SLCD,DRN	LOCAL		Case 6/#10		#10 CAN, drained		\$29.25
901667	APPLES,CND,WATER PACK,SLCD	LOCAL		Case		#10 CAN		\$15.75
9003	APPLES,RAW,WITH SKIN	USDA		case 10#		medium (3 per LB)		\$16.75
9026	APRICOTS,CND,LT SYRUP PK,W/SKN,SOL&LIQUIDS	USDA		Case 6/#10		#10 CAN		\$25.00
601476	BEEF FLAMEBROIL PATTY # 155-525 ADVANCE FOOD	LOCAL		Case (135ct)		SLEEVE (27ct)		\$31.25
23567	BEEF GROUND 85% LN MEAT / 15% FAT RAW	USDA		Case (4		Chub		\$95.00



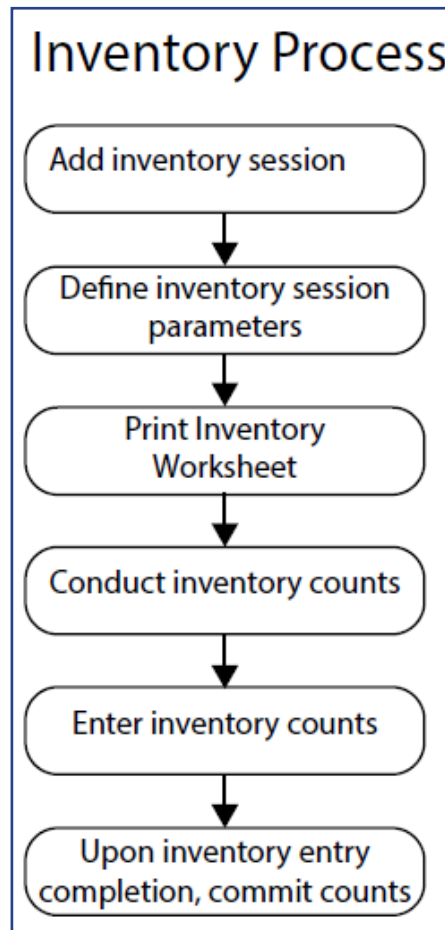
# INVENTORY

## Inventory Overview

Inventory provides the ability to enter physical counts of items during an inventory session. This ensures your in-stock quantity counts are accurate and accounted for, accurate reporting, and can assist with audits.



The following diagram illustrates the inventory process.



# INVENTORY

## Physical Counts

Physical Counts allows you to periodically conduct physical counts at a site for the inventory you have on-hand. You can add, edit, and delete inventory sessions. The user must be assigned to the appropriate **Inventory - Physical Count** security group settings to manage inventory sessions, as well as provided rights to the appropriate fields. Please refer to the Setup section to provide users the appropriate access to managing inventory. Additional Ordering & Inventory System Settings may be selected for the physical count process: *Physical Counts - Blind Physical Counts* and *Physical Counts - Treat Blank Count Value as Zero*. Please refer to the Setup section to select how these settings should perform.

### Search Physical Inventory

Perform the following procedure to search for inventory count sessions.

1. From the left-hand navigation bar, click **Inventory**.
2. Click **Physical Counts**.
3. Select your search criteria. The filters can be left blank to display and default setting retained to display all open inventory sessions in the search results.  
**Note:** Inventory Status - The search result will only display the status selected. To view all statuses, use the drop-down menu and select *blank*.  
**Note:** Start Date/End Date - The search result will only display inventory sessions that have a start and end date that fall completely within the search filter date range selected.
4. Click **Search**. The following fields are displayed:

Column Label	Description
Counts	Allows the user to open the physical count session and complete the necessary tasks by clicking on the link.
Site	The specific site where physical counts are being conducted.
Product Category	The specific product category type or all product categories (depending on Setup).
Usage Category	The specific usage category type or all usage categories (depending on Setup).
Storage Category	The specific storage category type or all storage categories (depending on Setup).
Start Date	The date in which the physical inventory count starts.
End Date	The date in which the physical inventory count ends.
Inventory Status	Displays the status of the physical inventory selected during Search.
Completed	Displays the percentage of physical counts completed for the session.
Setup	Allows changes to be established in the setup up the physical inventory (depending on permissions) by clicking on the link.

The screenshot shows a search interface with the following fields:

- Site: [Dropdown]
- Site Group: [Dropdown]
- Product Category: [Dropdown]
- Usage Category: [Dropdown]
- Inventory Status: [Dropdown, value: Opened]
- Start Date: [Date Picker]
- End Date: [Date Picker]
- Storage Category: [Dropdown]

Buttons: **Reset** (red), **Add** (green), **Search** (blue).

Table Header:

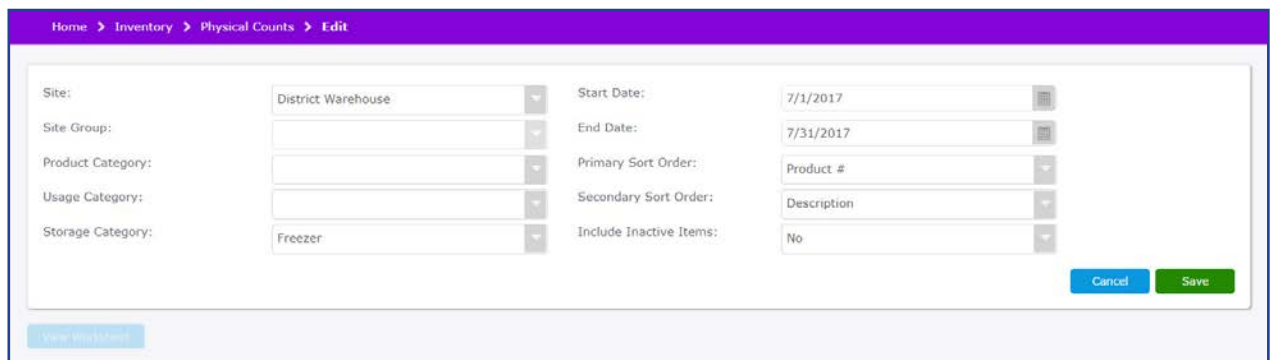
Counts	Site	Product Category	Usage Category	Storage Category	Start Date	End Date	Inventory Status	Completed
--------	------	------------------	----------------	------------------	------------	----------	------------------	-----------

# INVENTORY

## Adding Physical Counts (Physical Inventory Sessions)

Perform the following procedure to add an inventory session.

1. From the left-hand navigation bar, click **Inventory**.
2. Click **Physical Inventory**.
3. Click **Add**.
4. From the drop-down, select the appropriate **Site** location or **Site Group**. This field is required.
5. If desired, select **Categories** (product, usage, and storage) from the appropriate drop-down menus. Categories are helpful when you would like to count a subset of items. This may be helpful in managing how you distribute the inventory counting responsibilities among your staff.
6. Select a **Start** and **End Dates** for the inventory session. (Defaults to the current date.)
7. Select a **Primary Sort Order** (Product # (default), Description, Product Category) from the drop-down menu. You may also select a **Secondary Sort Order**. This specifies the order in which items display on the inventory worksheet and the grid that allows you to enter your physical counts.
8. If desired, use the drop-down menu to **Include Inactive Items**. By default, inactive items are not included.
9. Click **Save**.



The screenshot shows a web form titled "Home > Inventory > Physical Counts > Edit". The form contains several fields:

- Site: District Warehouse (dropdown)
- Site Group: (empty dropdown)
- Product Category: (empty dropdown)
- Usage Category: (empty dropdown)
- Storage Category: Freezer (dropdown)
- Start Date: 7/1/2017 (calendar icon)
- End Date: 7/31/2017 (calendar icon)
- Primary Sort Order: Product # (dropdown)
- Secondary Sort Order: Description (dropdown)
- Include Inactive Items: No (dropdown)

Buttons: "Cancel" (blue), "Save" (green), and "View Worksheet" (blue).

Upon completion the **Physical Count Saved Successfully** prompt displays.

**Physical Count saved successfully**

10. You are prompted to view the inventory worksheet. Select **Yes** or **No**.



The dialog box has a title bar "Success" with a green checkmark icon. The main text asks "Do you wish to view the Inventory Worksheet?". At the bottom, there are two buttons: "Yes" (green) and "No" (red).

# INVENTORY

## Inventory Worksheet

Inventory worksheets provides a list that can be used to record the results when performing a manual count of items for an inventory session. You have the option to choose a primary and secondary sort order by description, product number, or product description.

Perform the following procedure to view or print a worksheet.

1. From the left-hand navigation bar, click **Inventory**.
2. Click **Physical Counts**.
3. Select your search criteria.  
**Note:** The filters can be left blank to display all products in the search results.
4. Click **Search**.
5. Click **Setup** or double click the row in the grid for the appropriate inventory session.
6. Click **View Worksheet**.

The screenshot shows a software interface for setting up an inventory worksheet. At the top, a purple navigation bar contains the breadcrumb: Home > Inventory > Physical Counts > Edit. Below this is a white dialog box with a light gray border. It contains several input fields: 'Site' is set to 'Hamilton Elementary'; 'Product Category' is set to 'All'; 'Storage Category' is set to 'All'; and 'Usage Category' is set to 'All'. To the right, 'Start Date' is set to '7/1/2016' and 'End Date' is set to '7/31/2016', both with calendar icons. 'Sort Order' is set to 'Product #' with a dropdown arrow. At the bottom right of the dialog are 'Cancel' and 'Save' buttons. Below the dialog, a blue 'View Worksheet' button is highlighted with a red rectangular box.

# INVENTORY

7. The following is a sample worksheet. Print the worksheet and record the values of counted items.

## Physical Counts - Blind Inventory - Uncommitted

<b>Inventory Worksheet</b>					Heartland School Solutions			
Adams Elementary					12/4/17 - 12/4/17			
Primary Sort Order: Product #								
<b>Cooler</b>								
Product #	Description	Brand	Product Category	QTY	Purchase Units		Stock Units	
					Actual Quantity	Description	Actual Quantity	Description
088-001	Chocolate Milk FF MooMoo Dairy	MooMoo Dairy	XDairy, F			case 50 Ct		Carton
1042-001	CHEESE,PAST PROCESS,AMERICAN,W/DI NA PO4	Land O Lakes	DAIRY	x		Case 4 cartons		Carton (160 slices)
1082-001	MILK,LOWFAT,1%	Hiland	DAIRY			Case 50ct		Carton
1085-001	MILK,NONFAT,FLUID,SKIM	Hiland	DAIRY			Case 50ct		Carton
1085-002	MILK,NONFAT,FLUID,SKIM	Mooove Milk	DAIRY			case		carton
11124-001	CARROTS,RAW-----VERY LONG DISCRPTION IN THIS FIEL	ABC	PRODUCE			Case 4/5# Bags		Bag 5#
11124-002	CARROTS,RAW-----VERY LONG DISCRPTION IN THIS FIEL	ABC-Shredded	PRODUCE			Case 4/5#		Bag 5#
11960-2-001	CARROTS,BABY,RAW: Individual Pkg	ABC	PRODUCE			Case 144ct		Pkg (70g)
23-001	Strawberry Milk FF MooMoo Dairy	Moo Moo	XDairy, F			50 ct		carton
902428-001	MILK,CHOCOLATE,FAT FREE	Hiland	DAIRY			Case 50ct		Carton
TEST 1-001	CHEESE,CREAM	Kraft	DAIRY			Box		1 Brick
<b>Freezer</b>								
Product #	Description	Brand	Product Category	QTY	Purchase Units		Stock Units	
					Actual Quantity	Description	Actual Quantity	Description
123456792-001	Chicken Patty CKD BRD 16051	Tyson	MEAT, FZ			Case/150/Patty 3.29 oz		Patty 3.29 oz
123456794-001	BEEF FLAMEBROIL PATTY # 155-525 ADVANCE FOOD		MEAT, FZ			Case (135ct)		Patty
23567-001	BEEF,GROUND,85% LN MEAT / 15% FAT,RAW	Archer	MEATFRZ			Case (4 Chubs)		Chub (10#)
60001-001	Chicken Patty		MEAT, FZ			Case (60ct)		Patty 2.9 oz
601476-001	BEEF FLAMEBROIL PATTY	Advance Food	MEATFRZ			Case (135ct)		Sleeve (27ct)
<b>Stockroom</b>								

## Physical Counts - No Blind Inventory - Uncommitted

<b>Inventory Worksheet</b>				Heartland School Solutions						
Adams Elementary				12/4/17 - 12/4/17						
Primary Sort Order:		Product #								
<b>Cooler</b>										
Product #	Description	Brand	Product Category	CMDDTY	Purchase Units			Stock Units		
					System Qty	Actual Qty	Description	System Qty	Actual Qty	Description
088-001	Chocolate Milk FF MooMoo Dairy	MooMoo Dairy	XDairy, F		2		case 50 Ct	0		Carton
1042-001	CHEESE,PAST PROCESS,AMERICAN,W/DI NA PO4	Land O Lakes	DAIRY	x	58		Case 4 cartons	2		Carton (160 slices)
1082-001	MILK,LOWFAT,1%	Hiland	DAIRY		11		Case 50ct	35		Carton
1085-001	MILK,NONFAT,FLUID,SKIM	Hiland	DAIRY		10		Case 50ct	0		Carton
1085-002	MILK,NONFAT,FLUID,SKIM	Moooove Milk	DAIRY		0		case	0		carton
11124-001	CARROTS,RAW-----VERY LONG DISCRPTION IN THIS FIEL	ABC	PRODUCE		11		Case 4/5# Bags	1		Bag 5#
11124-002	CARROTS,RAW-----VERY LONG DISCRPTION IN THIS FIEL	ABC-Shredded	PRODUCE		7		Case 4/5#	0		Bag 5#
11960-2-001	CARROTS,BABY,RAW: Individual Pkg	ABC	PRODUCE		0		Case 144ct	0		Pkg (70g)
23-001	Strawberry Milk FF MooMoo Dairy	Moo Moo	XDairy, F		0		50 ct	10		carton
902428-001	MILK,CHOCOLATE,FAT FREE	Hiland	DAIRY		1		Case 50ct	0		Carton
TEST 1-001	CHEESE,CREAM	Kraft	DAIRY		1		Box	0		1 Brick
<b>Freezer</b>										
Product #	Description	Brand	Product Category	CMDDTY	Purchase Units			Stock Units		
					System Qty	Actual Qty	Description	System Qty	Actual Qty	Description
123456792-001	Chicken Patty CKD BRD 16051	Tyson	MEAT, FZ		0		Case/150/Patty 3.29 oz	37		Patty 3.29 oz
123456794-001	BEEF FLAMEBROIL PATTY # 155-525 ADVANCE FOOD		MEAT, FZ		4		Case (135ct)	0		Patty
23567-001	BEEF_GROUND,85% LN MEAT / 15% FAT,RAW	Archer	MEATFRZ		3		Case (4 Chubs)	0		Chub (10#)
60001-001	Chicken Patty		MEAT, FZ		3		Case (60ct)	50		Patty 2.9 oz
601476-001	BEEF FLAMEBROIL PATTY	Advance Food	MEATFRZ		2		Case (135ct)	1		Sleeve (27ct)
<b>Stockroom</b>										
Product #	Description	Brand	Product Category	CMDDTY	Purchase Units			Stock Units		
					System Qty	Actual Qty	Description	System Qty	Actual Qty	Description
02-001	ROLLS, HAMBURGER WW	SARAH LEE	GRAINS		27		CASE 6/BAGS	1		BAG 30 COUNT
03-001	CORN, CANNED YELLOW	LIBBY	VEG, CN		3		CASE 6 / #10 CAN	0		#10 CAN
03-002	CORN, CANNED YELLOW	ABC	VEG, CN		0		Case 6/#10	0		#10 Can
1000-001	STOCK POT (20qt), Stainless Steel w/Lid	RKO	SMALLWA RES		5		Stockpot (20qt)	0		Stockpot 20qt
1001-001	STOCK POT (20qt) Aluminum w/Lid	RKO	SMALLWA RES		4		Stockpot (20qt)	0		Stockpot (20qt)

# INVENTORY

## Entering Physical Counts

Please refer to the Setup section, System Settings topic if you want to use blind physical counts. Perform the following procedure to add counts to an inventory session.

1. From the left-hand navigation bar, click **Inventory**.
2. Click **Physical Counts**.
3. Select your search criteria.  
**Note:** The filters can be left blank to display all products in the search results.
4. Click **Search**.
5. Click **Enter** for the appropriate inventory session.

Counts	Site	Product Category	Usage Category	Storage Category	Start Date	End Date	Inventory Status	Completed	
<a href="#">Enter</a>	GEORGE...	All	All	All	02/01/2016	02/29/2016	Opened	0.0%	<a href="#">Setup</a>
<a href="#">Enter</a>	Ocean El...	All	All	All	02/11/2016	02/29/2016	Opened	0.0%	<a href="#">Setup</a>

6. If you would like to just enter in a subset of your physical count values, you may search for a specific product or choose category filters. However, any category filter that was set during the creation of the inventory session cannot be changed. Status defaults to “Uncommitted”.  
**Note:** The filters can be left blank to display all products in the search results.
7. Click **Search**. The product list grid displays.

Fields for quantities that require entry are yellow within the Purchase Unit Quantity and Stock Unit Quantity columns.

Product #	Description	Brand	Product Category	Usage Category	Storage Category	Purchase Unit Quantity	Purchase Unit Description	Stock Unit Quantity	Stock Unit Description	Commit Date
101010-001	Cheese, Cream	Vermont	DAIRY	PURCH	COOLER		Case		Can	
202020-001	Cheese, Cheddar	Kraft	DAIRYF...	PURCH	COOLER		Case		5# Block	
202020-002	Cheese, Cheddar	Cracker...	DAIRYF...	PURCH	COOLER		Block		5#	
39005-001	Del Monte	Del Mon...	BEANCAN	PURCH	STOCK...		Case		can#10	

# INVENTORY

- From the recorded values on your worksheet, enter the Purchase Unit Quantity (P/U Qty) and Stock Unit Quantity (S/U Qty) for each product. When a value is entered the field will be white. The value can be modified if necessary. If your system is not configured for blind physical counts you will see values in these fields based on what the system believes to be the quantities on hand. For any of these values that match your physical count, you may just tab to the next field that requires a correction. Depending on the permissions of your Security Group, Stock Unit Quantity may have a decimal value if only part of a stock unit is available. For example, if an item has a stock unit of “Bag”, but there is currently half of a full Bag left in stock, add 0.5 to indicate the half of a Bag in inventory.

**Note:** To enter partial Stock Unit Quantities, the feature must be enabled under Setup > System Settings.

## Physical Counts Buttons

Button	Description
Clear	<b>Clear</b> will revert all the displayed uncommitted values to the current system counts. This feature is useful if you are currently using a periodic inventory process.
Commit	<b>Commit</b> posts the values entered in the grid. The line item is marked as “Committed.” The following fields are updated and changed to read-only: last counted date, the inventory session, % complete, and quantity fields. A commit of values cannot be undone. If you notice a mistake within values that you have committed, you can correct the count by creating an Inventory Adjustment.
Close	<b>Close</b> returns you to the search screen. The entered quantities are saved but not yet committed.

Product #	Description	Brand	Product Category	Usage Category	Storage Category	Purchase Unit Quantity	Purchase Unit Description	Stock Unit Quantity	Stock Unit Description	Commit Date
101010-001	Cheese, Cream	Vermont	DAIRY	PURCH	COOLER	6	Case	3	block packa...	
202020-001	Cheese, Cheddar	Kraft	DAIRYF...	PURCH	COOLER	10	Case	5	5# Block	
202020-002	Cheese, Cheddar	Cracker...	DAIRYF...	PURCH	COOLER	1	Block	8	5#	
39005-001	Del Monte	Del Mon...	BEANCAN	PURCH	STOCK...	2	Case	1	can#10	

- If the counts you have entered have been finalized and you are ready to post them, click **Commit**.  
**Note:** The Commit function will only post the values for the products that are currently being displayed in the grid based on the filters you’ve selected.
- In the confirmation prompt window, click **Continue**.  
Upon completion the **Physical Count Saved Successfully** prompt displays.



## Reviewing Committed Physical Count Worksheets

Once a physical count has been completed and committed, you may review the committed Inventory Worksheet.

Perform the following procedure to view or print a worksheet.

1. From the left-hand navigation bar, click **Inventory**.
2. Click **Physical Counts**.
3. Select your search criteria.  
**Note:** The filters can be left blank to display all products in the search results.
4. Click **Search**.
5. Click **Setup** or double click the row in the grid for the appropriate inventory session.
6. Click **View Worksheet**.
7. The following is a sample worksheet. Print the worksheet or review the values of counted items.

### Physical Counts - Blind Inventory - Committed

Inventory Worksheet					Heartland School Solutions			
Adams Elementary					11/10/17 - 11/10/17			
Primary Sort Order:					Product #			
<b>Cooler</b>								
Product #	Description	Brand	Product Category	CMQTY	Purchase Units		Stock Units	
					Actual Quantity	Description	Actual Quantity	Description
088-001	Chocolate Milk FF MooMoo Dairy	MooMoo Dairy	XDairy, F		2	case 50 Ct	0	Carton
1042-001	CHEESE,PAST PROCESS,AMERICAN,W/DI NA PO4	Land O Lakes	DAIRY	x	58	Case 4 cartons	2	Carton (160 slices)
1082-001	MILK,LOWFAT,1%	Hiland	DAIRY		11	Case 50ct	35	Carton
1085-001	MILK,NONFAT,FLUID,SKIM	Hiland	DAIRY		10	Case 50ct	0	Carton
1085-002	MILK,NONFAT,FLUID,SKIM	Moooove Milk	DAIRY		0	case	0	carton
11124-001	CARROTS,RAW-----VERY LONG DISCRPTION IN THIS FIEL	ABC	PRODUCE		11	Case 4/5# Bags	1	Bag 5#
11124-002	CARROTS,RAW-----VERY LONG DISCRPTION IN THIS FIEL	ABC-Shredded	PRODUCE		7	Case 4/5#	0	Bag 5#
11960-2-001	CARROTS,BABY,RAW: Individual Pkg	ABC	PRODUCE		0	Case 144ct	0	Pkg (70g)
23-001	Strawberry Milk FF MooMoo Dairy	Moo Moo	XDairy, F		0	50 ct	10	carton
902428-001	MILK,CHOCOLATE,FAT FREE	Hiland	DAIRY		1	Case 50ct	0	Carton
TEST 1-001	CHEESE,CREAM	Kraft	DAIRY		2	Box	0	1 Brick
<b>Freezer</b>								
Product #	Description	Brand	Product Category	CMQTY	Purchase Units		Stock Units	
					Actual Quantity	Description	Actual Quantity	Description
123456792-001	Chicken Patty CKD BRD 16051	Tyson	MEAT, FZ		0	Case/150/Patty 3.29 oz	37	Patty 3.29 oz
123456794-001	BEEF FLAMEBROIL PATTY # 155-525 ADVANCE FOOD		MEAT, FZ		4	Case (135ct)	0	Patty
23567-001	BEEF,GROUND,85% LN MEAT / 15% FAT,RAW	Archer	MEATFRZ		3	Case (4 Chubs)	0	Chub (10#)
60001-001	Chicken Patty		MEAT, FZ		3	Case (60ct)	50	Patty 2.9 oz
601476-001	BEEF FLAMEBROIL PATTY	Advance Food	MEATFRZ		2	Case (135ct)	1	Sleeve (27ct)

## Physical Counts - Blind Inventory - Committed

Inventory Worksheet					Heartland School Solutions					
Adams Elementary					11/10/17 - 11/10/17					
Primary Sort Order:					Product #					
<b>Cooler</b>										
Product #	Description	Brand	Product Category	CMNDTY	Purchase Units			Stock Units		
					System Qty	Actual Qty	Description	System Qty	Actual Qty	Description
088-001	Chocolate Milk FF MooMoo Dairy	MooMoo Dairy	XDairy, F		2	2	case 50 Ct	0	0	Carton
1042-001	CHEESE,PAST PROCESS,AMERICAN,W/DI NA PO4	Land O Lakes	DAIRY	x	58	58	Case 4 cartons	2	2	Carton (160 slices)
1082-001	MILK,LOWFAT,1%	Hiland	DAIRY		11	11	Case 50ct	35	35	Carton
1085-001	MILK,NONFAT,FLUID,SKIM	Hiland	DAIRY		10	10	Case 50ct	0	0	Carton
1085-002	MILK,NONFAT,FLUID,SKIM	Mooove Milk	DAIRY		0	0	case	0	0	carton
11124-001	CARROTS,RAW----VERY LONG DISCRPTION IN THIS FIEL	ABC	PRODUCE		11	11	Case 4/5# Bags	1	1	Bag 5#
11124-002	CARROTS,RAW----VERY LONG DISCRPTION IN THIS FIEL	ABC-Shredded	PRODUCE		7	7	Case 4/5#	0	0	Bag 5#
11960-2-001	CARROTS,BABY,RAW: Individual Pkg	ABC	PRODUCE		0	0	Case 144ct	0	0	Pkg (70g)
23-001	Strawberry Milk FF MooMoo Dairy	Moo Moo	XDairy, F		0	0	50 ct	10	10	carton
902428-001	MILK,CHOCOLATE,FAT FREE	Hiland	DAIRY		1	1	Case 50ct	0	0	Carton
TEST 1-001	CHEESE,CREAM	Kraft	DAIRY		1	2	Box	0	0	1 Brick
<b>Freezer</b>										
Product #	Description	Brand	Product Category	CMNDTY	Purchase Units			Stock Units		
					System Qty	Actual Qty	Description	System Qty	Actual Qty	Description
123456792-001	Chicken Patty CKD BRD 16051	Tyson	MEAT, FZ		0	0	Case/150/Patty 3.29 oz	37	37	Patty 3.29 oz
123456794-001	BEEF FLAMEBROIL PATTY # 155-525 ADVANCE FOOD		MEAT, FZ		4	4	Case (135ct)	0	0	Patty
23567-001	BEEF,GROUND,85% LN MEAT / 15% FAT,RAW	Archer	MEATFRZ		3	3	Case (4 Chubs)	0	0	Chub (10#)
60001-001	Chicken Patty		MEAT, FZ		3	3	Case (60ct)	50	50	Patty 2.9 oz
601476-001	BEEF FLAMEBROIL PATTY	Advance Food	MEATFRZ		2	2	Case (135ct)	1	1	Sleeve (27ct)
<b>Stockroom</b>										
Product #	Description	Brand	Product Category	CMNDTY	Purchase Units			Stock Units		
					System Qty	Actual Qty	Description	System Qty	Actual Qty	Description
02-001	ROLLS, HAMBURGER WW	SARAH LEE	GRAINS		27	27	CASE 6/BAGS	1	1	BAG 30 COUNT
03-001	CORN, CANNED YELLOW	LIBBY	VEG, CN		3	3	CASE 6 / #10 CAN	0	0	#10 CAN
03-002	CORN, CANNED YELLOW	ABC	VEG, CN		0	0	Case 6/#10	0	0	#10 Can
1000-001	STOCK POT (20qt), Stainless Steel w/Lid	RKO	SMALLWARES		5	5	Stockpot (20qt)	0	0	Stockpot 20qt
1001-001	STOCK POT (20qt) Aluminum w/Lid	RKO	SMALLWARES		4	4	Stockpot (20qt)	0	0	Stockpot (20qt)

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## Modifying Physical Counts Setup

The following is a list of allowable inventory session changes.

- The **Start Date** cannot be changed once a count has been committed.
- The **End Date** cannot be modified once an inventory session is complete.
- **Primary Sort Order** is used to define the primary sort order (Description, Product # or Product Category) by which items are listed on an inventory worksheet and the inventory counts entry screen.
- **Secondary Sort Order** is an optional filter used to define the secondary sort order (Description, Product # or Product Category) by which items are listed on an inventory worksheet and the inventory counts entry screen. This is useful in cases when you would like to do a sort of items that have already been sorted by their primary sort order.

Home > Inventory > Physical Counts > Edit

Site:	Hamilton Elementary	Start Date:	7/1/2016
Product Category:	All	End Date:	7/31/2016
Storage Category:	All	Sort Order:	Product #
Usage Category:	All		

Cancel Save

View Worksheet

## Deleting Physical Counts (Physical Inventory Sessions)

Perform the following procedure to delete an inventory session.

**Note:** **Delete** is not allowed if the percent complete is greater than 0%.

1. From the left-hand navigation bar, click **Inventory**.
2. Click **Physical Counts**.
3. Select the appropriate filters for the desired search results.
4. Click **Search**.
5. Click **Setup** or double click the row in the grid to view or edit an inventory session.
6. Click **Delete**. The following prompt displays.
7. Click **Yes**.

Warning

Are you sure you want to delete this Inventory session?

Yes No

Upon completion the **Inventory session deleted successfully** prompt displays.

## Adjustments

Adjustments are used to make corrections to your inventory counts and pricing if necessary. A user must be assigned to the appropriate **Inventory - Adjustments** security group settings to manage adjustments. Please refer to the Setup section to provide users the appropriate access to the adjustments feature.

### Adjustment Reasons Settings

Mosaic Ordering and Inventory is pre-configured with several adjustment reasons. Refer to the Setup section, Inventory Adjustment Reasons topic if you would like to add or delete reasons.

Perform the following procedure to search for an adjustment.

1. From the left-hand navigation bar, click **Inventory**.
2. Click **Adjustments**.
3. Select your search criteria.  
**Note:** The Start and End Dates default to the current date. The remaining filters can be left blank.
4. Click **Search**.
5. Click the appropriate Adjustment # hyperlink.

Adjustment #	Product #	Description	Brand	Adjustment Amount	Adjustment Reason	Site	Entered By	Adjustment Date	Committed
<a href="#">1</a>	118488-001	ALPINE LACE RF...	Swiss cheese	(+) 2 CS, 4 each	Count Correction	GEORGE WASHI...	Gloria J	8/10/2016	No
<a href="#">2</a>	11111-002	BEANS	Del Monte	(+) 5 CS (12oz), 6...	Count Correction	GEORGE WASHI...	Gloria J	8/10/2016	Yes
<a href="#">3</a>	39005-001	Del Monte	Del Monte	(+) 1 Case, 12 can...	Count Correction	GEORGE WASHI...	Gloria J	8/10/2016	Yes

## Add Adjustment

Perform the following procedure to add an adjustment.

1. From the left-hand navigation bar, click **Inventory**.
2. Click **Adjustments**.
3. Click **Add**.
4. Select a location from the Site drop-down list.
5. Select your search criteria.  
**Note:** The remaining filters can be left blank to display all products in the search results.
6. Click **Search**.
7. Click **Enter** for the appropriate session.

Home > Inventory > Adjustments > Edit

Site:  Needs Attention:

Product # or Description:  Active:

Product Category:

Usage Category:

Storage Category:

Adjustment	Product #	Description	Brand	Product ...	Usage C...	Storage ...	Qty on ...	Needs Attenti...	Active
<input type="button" value="Enter"/>	02-001	ROLLS, HAMBURGER WW	SARAH LEE	Breads a...	Purchase...	Stockroom	0 CASE 6...	No	Yes
<input type="button" value="Enter"/>	03-001	CORN, CANNED YELLOW	LIBBY	Vegetabl...	Purchase...	Stockroom	2 CASE 6...	Yes	Yes
<input type="button" value="Enter"/>	03-002	CORN, CANNED YELLOW	ABC	Vegetabl...	Purchase...	Stockroom	2 Case 6/...	No	Yes
<input type="button" value="Enter"/>	088-001	Chocolate Milk FF MooMoo Dairy	MooMoo	XDairy_F	Purchase	Cooler	0 case 50	No	Yes

8. From the Site drop-down menu, select the appropriate site.
9. From the Adjustment Type drop-down menu, select the appropriate adjustment type.  
**Note:** Adjustments resulting in a negative quantity on hand are not permitted.
10. Enter the Purchase Unit Adjustment Amount and Stock Unit Adjustment Amount quantities.  
Depending on the permissions of your Security Group, Stock Unit Quantity may have a decimal value if only part of a stock unit is available. For example, if an item has a stock unit of “Bag”, but there is currently half of a full Bag left in stock, add 0.5 to indicate the half of a Bag in inventory.
11. If desired, from the Adjustment Reason drop-down menu, select the appropriate adjustment reason.
12. If desired, enter a comment.

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13. If you would like to save this adjustment transaction without finalizing it, click **Save**. You can edit adjustments that have been saved but not yet committed.

## Adjustment Buttons

Button	Description
Delete	The <b>Delete</b> button displays only on an adjustment that is not committed. Click <b>Delete</b> to remove an uncommitted adjustment.
Cancel	The <b>Cancel</b> button returns you to the adjustment search screen.
Commit	The <b>Commit</b> button submits the adjustment. Once an adjustment is committed, you can only change the Adjustment Type and Comment. A committed adjustment cannot be deleted, so if you notice a mistake, you will need to correct the error with an additional Adjustment.
Save	The <b>Save</b> button allows you to submit an incomplete adjustment and return you to the adjustment search screen. The entered quantities are saved but not yet committed.

14. When finished, click **Commit**. You cannot modify an adjustment this has been committed.

Adjustment #1 - 118488-001 : ALPINE LACE RF SWI...

Site: GEORGE WASHINGTON ELEMEN...

Quantity on Hand: 0 CS, 0 each

Adjustment Type: Add (+)

Purchase Unit Adjustment Amount: 2 CS

Stock Unit Adjustment Amount: 4 each

Adjustment Reason: Count Correction

Comments:

Cancel Commit Save

15. The cost confirmation prompt displays.
- Verify the pre populated Purchase Unit Cost value.
  - Update the value if necessary.
  - Click **Save**.
16. Click **Continue** to confirm and commit the adjustment.

## Modify Adjustment

Perform the following procedure to modify an adjustment.

1. From the left-hand navigation bar, click **Inventory**.
2. Click **Adjustments**.
3. Select your search criteria.  
**Note:** The Start and End Dates default to the current date. The remaining filters can be left blank.
4. Click **Search**.
5. Click the appropriate Adjustment # hyperlink.

Adjustment #	Product #	Description	Brand	Adjustment Amount	Adjustment Reason	Site	Entered By	Adjustment Date	Committed
<a href="#">1</a>	118488-001	ALPINE LACE RF...	Swiss cheese	(+) 2 CS, 4 each	Count Correction	GEORGE WASHL...	Gloria J	8/10/2016	No
<a href="#">2</a>	11111-002	BEANS	Del Monte	(+) 5 CS (12oz), 6...	Count Correction	GEORGE WASHL...	Gloria J	8/10/2016	Yes
<a href="#">3</a>	39005-001	Del Monte	Del Monte	(+) 1 Case, 12 can...	Count Correction	GEORGE WASHL...	Gloria J	8/10/2016	Yes

6. Edit the adjustment.

If the adjustment is	you can modify the following fields:
not committed	Adjustment Type, Purchase and Stock Unit Adjustment Amounts, Adjustment Reason and Comments
committed	Adjustment Reason and Comments

8. When finished, click **Commit**.
9. Click **Save**.

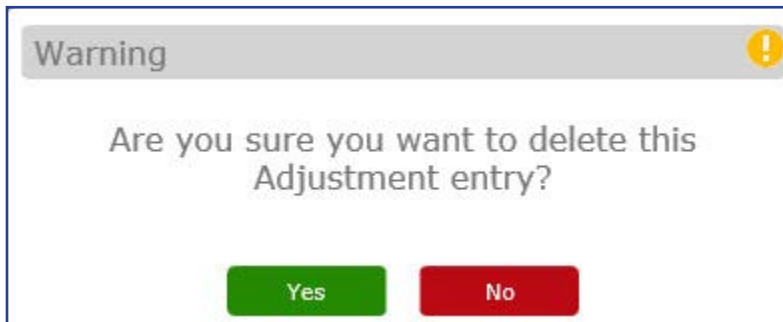
# INVENTORY

## Delete an Adjustment

You may delete an adjustment as long as it has not been committed. If the adjustment has been committed, **Delete** is not visible.

**Note:** Access to **Delete** is controlled through the security group **Inventory - Adjustments**. The user must be assigned to a security group that has the **Allow Delete** check box selected.

1. From the left-hand navigation bar, click **Inventory**.
2. Click **Adjustments**.
3. Select your search criteria.  
**Note:** The Start and End Dates default to the current date. The remaining filters can be left blank.
4. Click **Search**.
5. Click the appropriate the adjustment # hyperlink.
6. Click **Delete**.
7. The confirmation prompt displays, click **Yes**.



Upon completion the **Adjustment record deleted successfully** prompt displays.

**Adjustment record deleted successfully**



# INVENTORY

## Receiving

Receiving is used to manually enter product shipment receipts and are identified as an Instant receiving type. A user must be assigned to the appropriate **Inventory - Receiving** security group settings to manage receiving. Please refer to the Setup section to provide users the appropriate access to the receiving feature, as well as managing (adding additional or deleting) receiving exceptions reasons.

### Receiving Exceptions

Refer to the Setup section for managing (adding additional or deleting) exceptions.

Perform the following procedure to search for a receiving transaction.

1. From the left-hand navigation bar, click **Inventory**.
2. Click **Receiving**.
3. Select the appropriate Receiving Type from the drop-down menu. **Vendor Orders** is the default selection.
4. Select your search criteria.  
**Note:** The Start and End Dates default to the current date. The remaining filters can be left blank.
5. Click **Search**.
6. Click the appropriate Receiving # hyperlink.

The screenshot shows the 'Receiving' search interface. The breadcrumb path is 'Home > Inventory > Receiving'. The search form includes the following fields:

- Receiving Type: Vendor Order (dropdown)
- Vendor: (empty dropdown)
- Sending Site: (empty dropdown)
- Receiving Site: (empty dropdown)
- Fulfillment Status: (empty dropdown)
- Invoice #: (empty text field)
- Received Date Start: (empty date field)
- Received Date End: (empty date field)
- Entered By: (empty dropdown)
- Committed: (empty dropdown)
- Purchase Order #: (empty text field)

Buttons at the bottom right: Reset (red), Add (green), Search (blue).

Receiving #	Received Date	Vendor	Receiving Site	Invoice #	PO #	Receiving Type	Fulfillment Status	Entered By	Committed	Committed Date
<a href="#">5</a>	2/14/2018	Victory Corpor...	BOONE WOO...		2	Vendor Order	Partial	Craig	Yes	2/14/2018
<a href="#">6</a>	2/14/2018	Victory Corpor...	HEARTLAND I...		1	Vendor Order	Full	manager	Yes	2/14/2018
<a href="#">7</a>	2/14/2018	Victory Corpor...	BOONE WOO...		4	Vendor Order	Partial	manager	Yes	2/14/2018
<a href="#">8</a>	2/14/2018	Victory Corpor...	BOONE WOO...		9	Vendor Order	Rejected	manager	Yes	2/14/2018

### Add a New Receiving Transaction (Vendor Order Exists)

Perform the following procedure to add a receiving transaction from an existing vendor order.

1. From the left-hand navigation bar, click **Inventory**.
2. Click **Receiving**.
3. By default, **Vendor Orders** is selected for Receiving Type.
4. Select your search criteria.  
**Note:** The Start and End Dates default to the current date. The remaining filters can be left blank.
5. Click **Search**.
6. Click the appropriate Receiving # hyperlink.

7. Optional:
  - a. Enter an Invoice #.
  - b. Select Receive Date. This field defaults to the current date.
8. Enter the **Received Quantity** if it varies from the pre-filled receiving record.
9. Enter the **Purchase Unit Price** as displayed on the receiving invoice if it varies from the pre-filled receiving record.
10. If applicable, click on the *None* link and choose an Exception from the drop-down menu.
11. Repeat steps 8 - 10, for all products received.
12. If applicable, type a note in the Comment field.
13. Press **Enter**.
14. Click **Save** if you are not ready to commit the receiving.
15. Click **Commit** when you are ready to finalize the receiving transaction.
 

**Note:** If a Shelf Life has been established (Products > Maintenance > General), the expiration date will be established once the receiving invoice has been committed.

Home > Inventory > Receiving > Edit : Receiving # 68

Vendor: TEST Vendor      Received Date: 7/31/2017

Site: George Washington Elementary      Purchase Order #: 45

Invoice #:

Product #	Description	Brand	Ven... Prod...	Purchase Unit Description	Order Qty	Received Qty	Purchase Unit Price	Expiration Date	Exception	Total
11124-001	CARROTS,RAW-----VER...	ABC	sysco...	Case 4/5# Bags	1	1	13.56		<a href="#">None</a>	13.56

Comment:

Sub Total 13.56

Shipping Fee

Receiving Invoice Total 13.56

## Add a New Receiving Transaction (Site Transfer Exists)

Perform the following procedure to add a receiving transaction from an existing site-to-site transfer order.

1. From the left-hand navigation bar, click **Inventory**.
2. Click **Receiving**.
3. Use the drop-down menu to select **Site Transfer** from the Receiving Type.
4. Select your search criteria.

**Note:** The Start and End Dates default to the current date. The remaining filters can be left blank.

5. Click **Search**.
6. Click the appropriate Receiving # hyperlink.
7. Optional: Select Receive Date. This field defaults to the current date.
8. Enter the **P/U Qty Received**.
9. Enter the **S/U Qty Received**.
10. If applicable, click on the *None* link and choose an Exception from the drop-down menu.
11. Repeat steps 8 - 10, for all products received.
12. If applicable, type a note in the Comment field.
13. Press **Enter**.
14. Click **Save** if you are not ready to commit the receiving.
15. Click **Commit** when you are ready to finalize the receiving transaction.
 

**Note:** If a Shelf Life has been established (Products > Maintenance > General), the expiration date will be established once the receiving invoice has been committed.

Home > Inventory > Receiving > Edit : Receiving # 61

Sending Site: District Warehouse      Received Date: 7/31/2017

Receiving Site: Adams Elementary

Products Received

Product #	Descript...	Brand	P/U Descript...	P/U Price	P/U Qty Transferred	P/U Qty Received	S/U Description	S/U Qty Transferred	S/U Qty Received	Expiration Date	Exception
11124-001	CARROT...	ABC	Case 4/5...	10.23	1	<input type="text" value="1"/>	Bag 5#	1	<input type="text" value="1"/>		<a href="#">None</a>
9003-001	APPLES,F...	ABC	Case 113ct	25.66	1	<input type="text" value="1"/>	Each	1	<input type="text" value="1"/>		<a href="#">None</a>
902432-0...	BEANS,S...	Harvest	Case 6/#...	17.29	8	<input type="text" value="8"/>	#10 Can	1	<input type="text" value="1"/>		<a href="#">None</a>

Comment:

## Add a New Receiving Transaction (No Requisition or Vendor Order Exists)

Perform the following procedure to manually add a receiving transaction when no requisition or vendor order exists.

1. From the left-hand navigation bar, click **Inventory**.
2. Click **Receiving**.
3. Click **Add**.

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4. Select a **Vendor**, from the Vendor drop-down.
5. Select the **Site** you are receiving the products, from the Site drop-down.
6. Optional:
  - a. Enter an Invoice #.
  - b. Select Receive Date. This field defaults to the current date.
  - c. Enter Purchase Order #.

Home > Inventory > Receiving > Edit

Vendor: TEST Vendor      Received Date: 7/31/2017

Site: District Warehouse      Purchase Order #: 52

Invoice #: HYT1344

Products Received

7. When adding products to the receiving transaction, you have the ability to search by Product and include various fields, or by Product Group. Click **Search** and then select your preferred search criteria. The default search includes all fields. If you leave the Receiving Edit screen the search resets and all check boxes are selected.

### By Product and fields:

Products Received

Search Search Products... within Product #, Description, Brand, Vendor Product #

include fields:

- Product #
- Description
- Brand

### By Product Group:

Products Received

Search Search Product Groups... within Product Group Name

By Product  
By Product Group

Product #	Description	Brand	Ven... Prod...	Purchase Unit Description	Quantity Ordered	Quantity Received	Purchase Unit Price	Expiration Date	Exception	Total

8. Based on your search selection, enter appropriate information in the Search field, and then click the product to add it to the Product Received list.

Products Received

Search chees

Product #	Description	Brand	Vendor Product #
<input type="checkbox"/> 10000-001	Pizza Crust	Dominos	NY-cheese
<input type="checkbox"/> 101010-001	Cheese	Wegmans	213
<input type="checkbox"/> 101010-001	Cheese	Wegmans	999C
<input type="checkbox"/> 101010-001	Cheese	Wegmans	1111
<input type="checkbox"/> 101010-001	Cheese	Wegmans	4234
<input type="checkbox"/> 1658-001	101010-002 Cheese	Cheddar, Heluva...	NEW PRICE LIST
<input type="checkbox"/> 1059-001	101010-003 Cheese	Velveeta	232
<input type="checkbox"/> 1059-001	101010-003 Cheese	Velveeta	23142

9. Enter the **Quantity Ordered**.
10. Enter the **Quantity Received**.

# INVENTORY

11. Enter the Purchase Unit Price as displayed on the receiving invoice.
12. If applicable, click on the *None* link and choose an Exception from the drop-down menu.
13. Repeat steps 7 - 12, for all products received.
14. If applicable, type a note in the Comment field.
15. Press **Enter**.
16. If you need to add additional products, remove products, or modify the receiving transaction information, click **Save**.
17. Click **Commit** when you are ready to finalize the receiving transaction.  
**Note:** If a Shelf Life has been established (Products > Maintenance > General), the expiration date will be established once an item has been added.

The screenshot displays the 'Products Received' interface. At the top, there is a search bar with the text 'Search Products...' and a dropdown arrow. Below the search bar is a table with the following columns: Product #, Description, Brand, Ven... Prod..., Purchase Unit Description, Quantity Ordered, Quantity Received, Purchase Unit Price, Expiration Date, Exception, and Total. The table contains five rows of data. The first row is highlighted in blue. Below the table, there is a 'Comment:' field with a text area. To the right of the comment field, there are summary statistics: 'Sub Total' (3383.28), 'Shipping Fee' (0.00), and 'Receiving Invoice Total' (3383.28). At the bottom right, there are three buttons: 'Cancel', 'Commit', and 'Save'.

Product #	Description	Brand	Ven... Prod...	Purchase Unit Description	Quantity Ordered	Quantity Received	Purchase Unit Price	Expiration Date	Exception	Total
02-001	ROLLS, HAMBURGER ...	SARA...	23456	CASE 6/BAGS	182	182	5.94	8/3/2017	None	1081.08
03-001	CORN, CANNED YELL...	LIBBY	34567	CASE 6 / #10 ...	100	90	6.58	7/31/2018	Shorted	592.20
18036-001	BREAD,MIXED-GRAIN	XYZ		Loaf (24ct)	200	200	4.58		None	916.00
18967-001	BREAD,WHEAT	XYZ	bread...	Loaf (24ct)	200	200	3.97		None	794.00
2345-001	HOTDOG ROLLS/BUN...	Wond...	wond...	case	0				None	0.00

Sub Total: 3383.28  
Shipping Fee: 0.00  
Receiving Invoice Total: 3383.28

## Modifying a Receiving Transaction

Perform the following procedure to modify a receiving transaction.

1. From the left-hand navigation bar, click **Inventory**.
2. Click **Receiving**.
3. Select the appropriate Receiving Type. **Vendor Orders** is the default selection.
4. Select your search criteria.  
**Note:** The Start and End Dates default to the current date. The remaining filters can be left blank.
5. Click **Search**.
6. Click the appropriate Receiving # hyperlink.
7. Perform your changes.
  - a. If the receiving transaction was saved and not committed, you can edit all fields.
  - b. If the receiving transaction was committed, you can only edit Invoice #, Purchase Order #, Exception, Comment, and Shipping Fee.
8. Click **Save**.

## Removing a Product from a Receiving Transaction

To remove a product from a receiving transaction, select the check box and click **Remove**. You may only remove a product from the receiving transaction as long as the transaction has not been committed. If the receiving transaction is committed, **Remove** is not visible. The Remove button is not enabled unless a check box is selected.

Products Received

Search  within Product #, Description, Brand, Vendor Product #

<input type="checkbox"/>	Product #	Description	Brand	Ven... Prod...	Purchase Unit Description	Quantity Ordered	Quantity Received	Purchase Unit Price	Expiration Date	Exception
<input type="checkbox"/>	18036-001	BREAD,MIXED-GRAIN	XYZ		Loaf (24ct)	200	200	4.58		<a href="#">None</a>
<input type="checkbox"/>	18967-001	BREAD,WHEAT	XYZ	bread...	Loaf (24ct)	200	200	3.97		<a href="#">None</a>
<input type="checkbox"/>	2345-001	HOTDOG ROLLS/BUN...	Wond...	wond...	case	0				<a href="#">None</a>
<input type="checkbox"/>	902432-001	BEANS,SNAP,GREEN,...	Harv...	bean...	Case 6/#10	0				<a href="#">None</a>
<input checked="" type="checkbox"/>	9240-001	PEACHES,CND,LT SYRUP	US Blue		Case 6/#10	0				<a href="#">None</a>

**Remove** Comment:  Sub Total   
Shipping Fee

To remove all products from a receiving transaction, select the header check box and click **Remove**.

Products Received

Search  within Product #, Description, Brand, Vendor Product #

<input checked="" type="checkbox"/>	Product #	Description	Brand	Ven... Prod...	Purchase Unit Description	Quantity Ordered	Quantity Received	Purchase Unit Price	Expiration Date	Exception
<input checked="" type="checkbox"/>	18036-001	BREAD,MIXED-GRAIN	XYZ		Loaf (24ct)	200	200	4.58		<a href="#">None</a>
<input checked="" type="checkbox"/>	18967-001	BREAD,WHEAT	XYZ	bread...	Loaf (24ct)	200	200	3.97		<a href="#">None</a>
<input checked="" type="checkbox"/>	2345-001	HOTDOG ROLLS/BUN...	Wond...	wond...	case	0				<a href="#">None</a>
<input checked="" type="checkbox"/>	902432-001	BEANS,SNAP,GREEN,...	Harv...	bean...	Case 6/#10	0				<a href="#">None</a>
<input checked="" type="checkbox"/>	9240-001	PEACHES,CND,LT SYR...	US Bl...		Case 6/#10	0				<a href="#">None</a>

**Remove** Comment:  Sub Total   
Shipping Fee

## Create a Back Order for Items not Received

When you are in the process of entering a receiving transaction for a Vendor Order, the system can easily create a back order for items that were expected but not received. Perform the following procedure to create a back order.

1. From the left-hand navigation bar, click **Inventory**.
2. Click **Receiving**.
3. Select the Receiving Type, **Vendor Orders**.
4. Select your search criteria.

**Note:** The Start and End Dates default to the current date. The remaining filters can be left blank.



# INVENTORY

5. Click **Search**.
6. Click the appropriate Receiving # hyperlink.
7. Enter the appropriate value in the Received Qty field.
8. If desired, select **Shorted** from the Exception drop-down.

Products Received

Product #	Description	Brand	Vend... Prod...	Purchase Unit Description	Order Qty	Received Qty	Purchase Unit Price	Expiration Date	Exception	Total
10167-001	Toaster Pastry, Cinnamo...	Kellog...	46787	Case 120ct/Ea...	5	<input type="text" value="5"/>	96.84		None	484.20
1018-001	Chicken Breast Tenders,...	Chic'h...	6497	Case 2/Each 5L...	63	<input type="text" value="63"/>	18.94		None	1193.22
1021-001	Chicken, Breast Filet, L...	Koch	6246	Case 48 ct/Eac...	8	<input type="text" value="8"/>	24.94		None	199.52
1025-001	Chicken Nuggets, Bread...	Tyson	6467	Case 2/Each 5L...	42	<input type="text" value="42"/>	21.06		None	884.52
2102-001	Toaster Pastry, Strawbe...	Kellog...	46725	Case 120ct/Ea...	10	<input type="text" value="9"/>	96.84		None	871.56

Comment:

Sub Total 3633.02

Shipping Fee 0.00

9. Click **Commit**.

Home > Inventory > Receiving > Edit : Receiving # 4

Vendor: Hometown Food Distribution, Inc. Received Date: 7/31/2017

Site: GEORGE WASHINGTON ELEMENTARY Purchase Order #: 4

Invoice #: YC0641676

Products Received

Product #	Description	Brand	Vend... Prod...	Purchase Unit Description	Order Qty	Received Qty	Purchase Unit Price	Expiration Date	Exception	Total
10167-001	Toaster Pastry, Cinnamo...	Kellog...	46787	Case 120ct/Ea...	5	<input type="text" value="5"/>	96.84		None	484.20
1018-001	Chicken Breast Tenders,...	Chic'h...	6497	Case 2/Each 5L...	63	<input type="text" value="63"/>	18.94		None	1193.22
1021-001	Chicken, Breast Filet, L...	Koch	6246	Case 48 ct/Eac...	8	<input type="text" value="8"/>	24.94		None	199.52
1025-001	Chicken Nuggets, Bread...	Tyson	6467	Case 2/Each 5L...	42	<input type="text" value="42"/>	21.06		None	884.52
2102-001	Toaster Pastry, Strawbe...	Kellog...	46725	Case 120ct/Ea...	10	<input type="text" value="9"/>	96.84		None	871.56


Comment:

Sub Total 3633.02

Shipping Fee

Receiving Invoice Total 3633.02

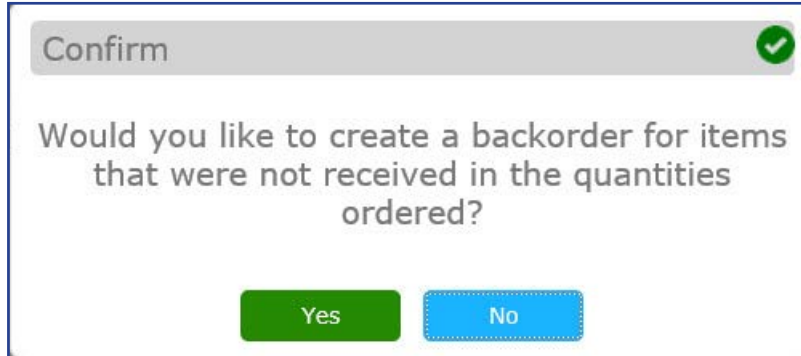
10. The following confirmation prompt displays. Click **Continue**.

Confirm 

You are about to commit the Receiving quantities entered. Do you wish to continue?

# INVENTORY

11. If the Received Quantity is less than the Order Quantity, the following confirmation prompt displays. Click **Yes**. The **Receiving record committed successfully** message displays.



12. The system automatically displays a new vendor order with the Site, Vendor, Product, and a comment “Back order from Receiving Transaction # X” populated.
13. Select a **Delivery Date**.
14. Per the normal procedures, you can modify, delete, approve, or save the order.

## Delete a Receiving Transaction

You may delete a receiving transaction as long as the transaction has not been committed. If the receiving transaction is committed, **Delete** is not visible.

**Note:** Access to **Delete** is controlled through the security group **Inventory - Receiving**. The user must be assigned to a security group that has the **Allow Delete** check box selected.

1. From the left-hand navigation bar, click **Inventory**.
2. Click **Receiving**.
3. Select your search criteria.  
**Note:** The Start and End Dates default to the current date. The remaining filters can be left blank.
4. Click **Search**.
5. Click the appropriate Receiving # hyperlink.



6. Click **Delete**.

Heartland School Solutions

Home > Inventory > Receiving > Edit : Receiving # 70

Vendor: TEST Vendor      Received Date: 7/31/2017

Site: District Warehouse      Purchase Order #: 52

Invoice #: HYT1344

### Products Received

Search Products... within Product #, Description, Brand, Vendor Product #

<input type="checkbox"/>	Product #	Description	Brand	Ven... Prod...	Purchase Unit Description	Quantity Ordered	Quantity Received	Purchase Unit Price	Expiration Date	Exception	Total
<input type="checkbox"/>	02-001	ROLLS, HAMBURGER ...	SARA...	23456	CASE 6/BAGS	182	182	5.94	8/3/2017	None	1081.08
<input type="checkbox"/>	03-001	CORN, CANNED YELL...	LIBBY	34567	CASE 6 / #10 ...	100	90	6.58	7/31/2018	Shorted	592.20
<input type="checkbox"/>	18036-001	BREAD,MIXED-GRAIN	XYZ		Loaf (24ct)	200	200	4.58		None	916.00
<input type="checkbox"/>	18967-001	BREAD,WHEAT	XYZ	bread...	Loaf (24ct)	200	200	3.97		None	794.00
<input type="checkbox"/>	2345-001	HOTDOG ROLLS/BUN...	Wond...	wond...	case	0	0			None	0.00

Remove      Comment:

Sub Total 3383.28

Shipping Fee

**Receiving Invoice Total 3383.28**

7. At the confirmation prompt, click **Yes**.

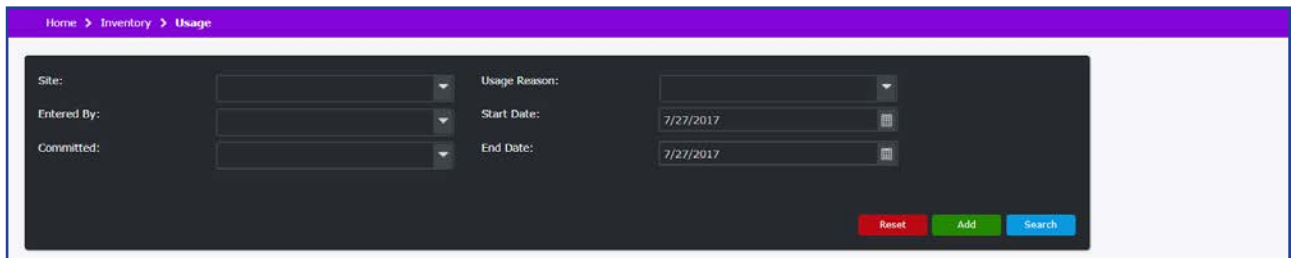
# INVENTORY

## Usage

Usage transactions may be added to manually reduce inventory counts due to standard use of products. Access to the **Inventory > Usage** is controlled through the security group, **Inventory - Usage**. Please refer to the Setup section to provide users the appropriate access to the Usage feature as well as managing usage reasons.

Perform the following procedure to search for a usage transaction.

1. From the left-hand navigation bar, click **Inventory**.
2. Click **Usage**.
3. Select your search criteria.  
**Note:** The Start and End Dates default to the current date. The remaining filters can be left blank.
4. Click **Search**.
5. Click the appropriate Transfer # hyperlink.



Home > Inventory > Usage

Site:  Usage Reason:

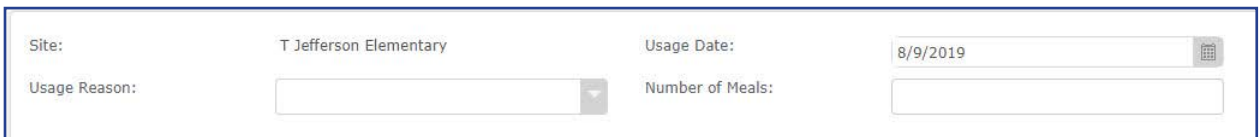
Entered By:  Start Date: 7/27/2017

Committed:  End Date: 7/27/2017

## Add Usage Transaction

Perform the following procedure to manually add a usage transaction.

1. From the left-hand navigation bar, click **Inventory**.
2. Click **Usage**.
3. Click **Add**.
4. Select the **Site**, from the Site drop-down.  
**Note:** Once a site is selected, it cannot be changed. You will need to click **Cancel**, and repeat steps 3 and 4.
5. Select Usage Date. This field defaults to the current date.
6. Select a Usage Reason (optional).
7. Enter the Number of Meals.  
**Note:** Entering the number of meals will result in capturing a more accurate average cost per meal.



Site: T Jefferson Elementary Usage Date: 8/9/2019

Usage Reason:  Number of Meals:

# INVENTORY

8. If desired, select **Import Menus** to import products from a selected menu or multiple menus.
 

**Note:** During the import process, quantities are calculated from total ingredient requirements based off of the production quantity type (Planned, Offered - default, Served) established in Setup > System Settings > Ordering & Inventory.

  - The amount required is summed and rounded up to the purchase unit (e.g. 50 beef patties each are required for service Monday and Tuesday for a total of 100 patties. Patties are packaged 75/case. Two cases are needed to meet the requirement).
  - Yield Factor % is taken into account (e.g. One lb of 80/20 raw ground beef *as purchased* = .74 lb cooked/draind. 16 oz x .74 = 11.84 oz; therefore, 1 lb raw ground meat = 11.84 oz lean, cooked meat. 11.84 oz is required for the 1 lb raw requested).
  - Meal Totals for Planned, Offered (default setting), or Served Reimbursement are imported into Total Meals on the Usage screen.

Products Used

Search  within Product #, Description, Brand

<input type="checkbox"/>	Product #	Description	Brand	Quantity per Purchase Unit	Quantity On Hand	P/U Qty	Purchase Unit Description	S/U Qty	Stock Unit Description

Remove Import Menu Comment:

- a. Select one or more menus from the **Menu Name** filter.
- b. Enter a **Menu Start and End Date**.
- c. Click the **Search** button.
- d. Locate the desired menu(s) to import by placing a checkmark in the box.
- e. Click **Select** to complete the import process.

Site: T Jefferson Elementary      Menu Start Date: 1/1/2018

Menu Name: Elementary Lunch-Traditional x      Menu End Date: 1/29/2018

Reset Search

<input type="checkbox"/>	Menu #	Menu Name	Menu Date	Serving Period	Grade / Age Group	Offered
<input checked="" type="checkbox"/>	2	Elementary Lunch-Traditional	01/01/2018	Lunch	K-5 (age 5-10)	Yes
<input type="checkbox"/>	2	Elementary Lunch-Traditional	01/02/2018	Lunch	K-5 (age 5-10)	Yes
<input type="checkbox"/>	2	Elementary Lunch-Traditional	01/03/2018	Lunch	K-5 (age 5-10)	Yes
<input type="checkbox"/>	2	Elementary Lunch-Traditional	01/04/2018	Lunch	K-5 (age 5-10)	Yes
<input type="checkbox"/>	2	Elementary Lunch-Traditional	01/05/2018	Lunch	K-5 (age 5-10)	Yes
<input type="checkbox"/>	2	Elementary Lunch-Traditional	01/08/2018	Lunch	K-5 (age 5-10)	Yes
<input type="checkbox"/>	2	Elementary Lunch-Traditional	01/09/2018	Lunch	K-5 (age 5-10)	Yes
<input type="checkbox"/>	2	Elementary Lunch-Traditional	01/10/2018	Lunch	K-5 (age 5-10)	Yes
<input type="checkbox"/>	2	Elementary Lunch-Traditional	01/11/2018	Lunch	K-5 (age 5-10)	Yes

Cancel Select

# INVENTORY

- When adding products to the usage transaction, you have the ability to search by Product and include various fields, or by Product Group. Click **Search** and then select your preferred search criteria. The default search includes all fields. If you leave the Usage Edit screen the search resets to the default and all check boxes are selected.

## By Product and fields:

Products Used

Search Search Products... within Product #, Description, Brand

By Product

Include fields:

- Product #
- Description
- Brand

By Product Group

Description	Brand	Quantity per Purchase Unit	Quantity On Hand	P/U Qty	Purchase Unit Description	S/U Qty	Stock Unit Description
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## By Product Group:

Products Used

Search Search Product Groups... within Product Group Name

By Product

By Product Group

Description	Brand	Quantity per Purchase Unit	Quantity On Hand	P/U Qty	Purchase Unit Description	S/U Qty	Stock Unit Description
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- Enter a product #, description, or brand in the Search field, and then click the product to add it to the Product Used list.

Products Used

Search Search bean

Product #	Description	Brand	Vendor Product #
<input type="checkbox"/>	Product	11111-002 BEANS	Del Monte null
		11111-001 BEANS	Birds Eye 34233
		11111-001 BEANS	Birds Eye 42334
		11111-001 BEANS	Birds Eye 344

- Enter the **P/U Qty** (Purchase Unit Quantity).

- Enter the **S/U Qty** (Stock Unit Quantity).

Depending on the permissions of your Security Group, Stock Unit Quantity may have a decimal value if only part of a stock unit is available. For example, if an item has a stock unit of “Bag”, but there is currently half of a full Bag left in stock, add 0.5 to indicate the half of a Bag in inventory.

**Note:** When entering Purchase Unit Quantity and Stock Unit Quantity a validation occurs and identifies if the usage results in a negative quantity on hand by displaying a red field tag. When you hover the mouse over the field tag the **Quantity Entered exceeds Quantity on Hand** tool tip displays. You can save the usage transaction, however you will not be able to Commit the usage transaction until the quantity value is corrected.

Home > Inventory > Usage > Edit

Site: Adams Elementary Usage Date: 8/9/2019

Usage Reason: Lunch Number of Meals:

Products Used

Search Search Products... within Product #, Description, Brand

Product #	Description	Brand	Quantity per Purchase Unit	Quantity On Hand	P/U Qty	Purchase Unit Description	S/U Qty	Stock Unit Description
902432-001	BEANS,SNAR,GRE...	Harvest	6 #10 Can per Ca...	0 Case 6/#10, 5 ...	0	Case 6/#10	3	#10 Can
60001-001	Chicken Patty		60 Patty 2.9 oz p...	5 Case (60ct), 0 P...	2	Case (60ct)	6	Patty 2.9 oz
9236-001	PEACHES,FRESH	ABC	113 Each per Cas...	1 Case 113ct, 0 E...	-2	Case 113ct	4	Each

# INVENTORY

- Repeat steps 10-12, for all products used.
- If applicable, type a note in the Comment field.
- If you need to add additional products, remove products, or modify the usage transaction information, click **Save**.
- Click **Commit** when you are ready to finalize the usage transaction.

The screenshot shows the 'Usage > Edit' interface. At the top, there are dropdown menus for 'Site' (Adams Elementary) and 'Usage Reason' (Lunch), and input fields for 'Usage Date' (8/9/2019) and 'Number of Meals'. Below this is a 'Products Used' section with a search bar and a table. The table has columns for Product #, Description, Brand, Quantity per Purchase Unit, Quantity On Hand, P/U Qty, Purchase Unit Description, S/U Qty, and Stock Unit Description. Two products are listed: 'BEANS, SNAP, GRE...' and 'Chicken Patty'. Below the table are 'Remove' and 'Import Menus' buttons. A 'Comment:' field is highlighted with a red box. At the bottom right, there are 'Cancel', 'Commit', and 'Save' buttons.

Product #	Description	Brand	Quantity per Purchase Unit	Quantity On Hand	P/U Qty	Purchase Unit Description	S/U Qty	Stock Unit Description
902432-001	BEANS, SNAP, GRE...	Harvest	6 #10 Can per Ca...	0 Case 6/#10, 5 ...	0	Case 6/#10	3	#10 Can
60001-001	Chicken Patty		60 Patty 2.9 oz p...	5 Case (60ct), 0 P...	2	Case (60ct)	6	Patty 2.9 oz

## Removing a Product from a Usage Transaction

To remove a product from a usage transaction, select the check box and click **Remove**. You may only remove a product from the usage transaction as long as the transaction has not been committed. If the usage transaction is committed, **Remove** is not visible. The Remove button is not enabled unless a check box is selected.

This is a close-up of the 'Products Used' table from the previous screenshot. The 'Remove' button is now visible and highlighted with a red box, indicating that the first product's checkbox is selected. The table contains two rows: 'BEANS, SNAP, GRE...' and 'CORN, CANNED Y...'. The 'Remove' button is located at the bottom left of the table area.

Product #	Description	Brand	Quantity per Purchase Unit	Quantity On Hand	P/U Qty	Purchase Unit Description	S/U Qty	Stock Unit Description
<input checked="" type="checkbox"/> 902432-001	BEANS, SNAP, GRE...	Harvest	6 #10 Can per Ca...	0 Case 6/#10, 5 ...	0	Case 6/#10	3	#10 Can
<input type="checkbox"/> 03-002	CORN, CANNED Y...	ABC	6 #10 Can per Ca...	2 Case 6/#10, 2 ...	2	Case 6/#10	1	#10 Can

# INVENTORY

To remove all products from a usage transaction, select the header check box and click **Remove**.

Products Used

Search  within Product #, Description, Brand

<input type="checkbox"/>	Product #	Description	Brand	Quantity per Purchase Unit	Quantity On Hand	P/U Qty	Purchase Unit Description	S/U Qty	Stock Unit Description
<input checked="" type="checkbox"/>	902432-001	BEANS,SNAP,GRE...	Harvest	6 #10 Can per Ca...	0 Case 6/#10, 5 ...	<input type="text" value="0"/>	Case 6/#10	<input type="text" value="3"/>	#10 Can
<input checked="" type="checkbox"/>	03-002	CORN, CANNED Y...	ABC	6 #10 Can per Ca...	2 Case 6/#10, 2 ...	<input type="text" value="2"/>	Case 6/#10	<input type="text" value="1"/>	#10 Can

Comment:

## Modify a Usage Transaction

Perform the following procedure to modify a usage transaction.

1. From the left-hand navigation bar, click **Inventory**.
2. Click **Usage**.
3. Select your search criteria.  
**Note:** The Start and End Dates default to the current date. The remaining filters can be left blank.
4. Click **Search**.
5. Click the appropriate Usage # hyperlink.
6. Perform your changes.
  - a. If the usage transaction was saved and not committed, you can edit all fields.
  - b. If the usage transaction was committed, you can only edit Usage Date, Comment, Number of Meals, and Usage Reason.
7. Click **Save**.

## Delete a Usage Transaction

You may delete a usage transaction as long as the transaction has not been committed. If the usage transaction is committed, **Delete** is not visible.

**Note:** Access to **Delete** is controlled through the security group **Inventory - Usage**. The user must be assigned to a security group that has the **Allow Delete** check box selected.

1. From the left-hand navigation bar, click **Inventory**.
2. Click **Usage**.
3. Select your search criteria.  
**Note:** The Start and End Dates default to the current date. The remaining filters can be left blank.
4. Click **Search**.
5. Click the appropriate Usage # hyperlink.

## 6. Click **Delete**.

Home > Inventory > Usage > Edit : Usage # 28

Site: T Jefferson Elementary Usage Date: 1/1/2018  
 Usage Reason: Lunch Number of Meals: 1360

Products Used

Search Products... within Product #, Description, Brand

Product #	Description	Brand	Quantity per Purchase Unit	Quantity On Hand	P/U Qty	Purchase Unit Description	S/U Qty	Stock Unit Description
9236-001	PEACHES,FRESH	ABC	113 Each per Cas...	0 Case 113ct, 0 E...	0	Case 113ct	0	Each
11124-001	CARROTS, RAW	ABC	4 Bag 5# per Cas...	18 Case 4/5# Bag...	4	Case 4/5# Bags	3	Bag 5#
2345-001	HOTDOG ROLLS/...	Wonder	20 loaf per case	2 case, 5 loaf	0	case	0	loaf
02-001	ROLLS, HAMBURG...	SARAH LEE	6 BAG 30 COUNT ...	43 CASE 6/BAGS,...	5	CASE 6/BAGS	4	BAG 30 CO...
902432-001	BEANS,SNAP,GRE...	Harvest	6 #10 Can per Ca...	1 Case 6/#10, 0 ...	0	Case 6/#10	0	#10 Can

Comment:  
Lunch usage for 1/1/2018

Delete Cancel Commit Save

## 7. At the confirmation prompt, click **Yes**.

## Transfers

Transfers are used to process and track inventory site transfer transactions. This feature allows you to keep accurate information in regards to the quantity on hand, as well as monitor inventory that is moved between sites. A user must be assigned to the appropriate **Inventory - Transfers** security group settings to manage transfers. Please refer to the Setup section to provide users the appropriate access to the transfers feature.

Perform the following procedure to search for transfers.

**Note:** Warehouse transfers made on the **Warehouse Hotshot Transfers** page will also appear on this page. However, in order to commit those warehouse transfers, a user must be assigned to the "Commit Transfers from Warehouse" permission *even if they already have the "Commit Transfers" permission available*. Please refer to the Setup section to provide users the appropriate access to committing warehouse transfers.

1. From the left-hand navigation bar, click **Inventory**.
2. Click **Transfers**.



# INVENTORY

- Select your search criteria.  
**Note:** The Transferred Start and End Dates default to the current date. The remaining filters can be left blank.
- Click **Search**. The following fields are displayed

Column Label	Description
Transfer #	An ascending numeric hyperlink assigned to the transfer transaction.
Status	The status is system assigned based on the transfer transaction progress. There are five statuses: <b>Requested</b> - Transfer has been processed and saved. A receiving transaction # has not been assigned and the transfer has not been committed. <b>Shipped</b> - The transfer transaction has been committed and a corresponding receiving # has been assigned. The sending site's inventory has been decremented. <b>Received</b> - The transfer transaction has been created and committed; the receiving transaction has been committed at the receiving site; and the inventory has been appropriately incremented. <b>Submitted</b> - The transfer transaction has been created, and the site manager has submitted the order. The transfer is awaiting approval and fulfillment from the warehouse admin. <b>Rejected</b> - The transfer transaction has been rejected.
Transfer Date	The transfer date assigned to the transfer transaction at the time of creation or when it was last edited.
Sending Site	The designated site sending the product.
Entered By	The name of the user that entered the transfer.
Committed Date	The date the transfer transaction was committed.
Transfer Committed	<b>Yes</b> displays when the transfer has been committed. <b>No</b> displays if the transfer has not been committed.
Receiving #	An ascending numeric hyperlink assigned to the receiving transaction.
Received Date	The date the receiving transaction was committed.
Receiving Site	The designated site receiving the product.
Receiving Committed	<b>Yes</b> displays when the receiving transaction has been committed. <b>No</b> displays if the receiving transaction has not been committed.
Requisition #	The value represents the requisition number if a transfer was created through a requisition.

- Click the appropriate Transfer # hyperlink.  
**Note:** You may also click the Requisition # to be redirected to the respective requisition order in the system.

Home > Inventory > Transfers

Sending Site:   
 Receiving Site:   
 Status:   
 Entered By:   
 Transfer Committed:   
 Transferred Start Date: 7/24/2017  
 Transferred End Date: 7/28/2017  
 Requisition #:

Reset Add Search

Transfer #	Status	Transfer Date	Sending Site	Entered By	Committed Date	Transfer Committed	Receiving #	Received Date	Receiving Site	Receiving Committed	Requisition #
<a href="#">27</a>	Requested	7/25/2017	Adams Elementary	manager		No			George Washington Eleme...	No	<a href="#">5</a>
<a href="#">28</a>	Received	7/25/2017	Adams Elementary	manager	7/28/2017	Yes	<a href="#">65</a>	7/28/2017	George Washington Eleme...	Yes	<a href="#">6</a>
<a href="#">29</a>	Shipped	7/25/2017	District Warehouse	manager	7/28/2017	Yes	<a href="#">66</a>		George Washington Eleme...	No	<a href="#">6</a>



## Add Transfer Transaction

Perform the following procedure to add a site transfer transaction.

1. From the left-hand navigation bar, click **Inventory**.
2. Click **Transfers**.
3. Click **Add**.
4. Select a Site from the **Sending Site** drop-down.
5. Select a Site from the **Receiving Site** drop-down.
6. Select a **Transfer Date**. This field defaults to the current date.

**Note:** The **Status** field is a read-only field. When adding a transfer, the Status displays as **Requested**.

Home > Inventory > Transfers > Edit

Sending Site: CLINTON ELEMENTARY      Transfer Date: 10/9/2017

Receiving Site: GEORGE WASHINGTON ELEMENTARY      Status: Requested

7. When adding products to the transfer transaction, you have the ability to search by Product and include various fields, or by Product Group. Click **Search** and then select your preferred search criteria. The default search includes all fields. If you leave the Transfer Edit screen the search resets to the default and all check boxes are selected.

### By Product and fields:

Search Search Products... within Product #, Description, Brand, Vendor Product #

By Product

Include fields:

- Product #
- Description
- Brand
- Vendor Product #

Description	Brand	Quantity per Purchase Unit	Quantity On Hand	P/U Qty	Purchase Unit Description	S/U Qty	Stock Unit Description
-------------	-------	----------------------------	------------------	---------	---------------------------	---------	------------------------

### By Product Group:

Search Search Product Groups... within Product Group Name

Product Group Name	Purchase Unit Description	Order Qty	Purchase Unit Price	Total
Mosaic Test				
Produce				

8. Enter a product #, description, brand, or vendor product # in the Search field, and then click the product to add it to the Products Transferred list.

Home > Inventory > Transfers > Edit

Sending Site: CLINTON ELEMENTARY      Transfer Date: 10/9/2017

Receiving Site: GEORGE WASHINGTON ELEMENTARY      Status: Requested

Requisition #:

Products Transferred

Search Ch within Product #, Description, Brand

Product #	Description	Brand	P/U Qty	Purchase Unit Description	S/U Qty	Stock Unit Description
10168-002	Peaches					
1018-001	Chicken Breast Tenders, Breaded...Chic'n Time					
1021-001	Chicken, Breast Filet, IQF Bonele...Koch					
1025-001	Chicken Nuggets, Breaded WG	Tyson				
1113-001	Pizza,Wedge, Cheese,W.G. Crust	The Max				
1114-001	Pizza,Wedge,Pepperoni and Chee...The Max					
1118-001	Un crustable WG Soybutter and J... Albie's					

# INVENTORY

- Enter the **P/U Qty** (Purchase Unit Quantity). This value must be less than or equal to the purchase unit quantity on hand.
- Enter the **S/U Qty** (Stock Unit Quantity). This value must be less than or equal to the stock unit quantity on hand.

Depending on the permissions of your Security Group, Stock Unit Quantity may have a decimal value if only part of a stock unit is available. For example, if an item has a stock unit of “Bag”, but there is currently half of a full Bag left in stock, add 0.5 to indicate the half of a Bag in inventory.

**Note:** When entering Purchase Unit Quantity and Stock Unit Quantity a validation occurs and identifies if the transfer results in a negative quantity on hand by displaying a red field tag. When you hover the mouse over the field tag the **Quantity Entered exceeds Quantity on Hand** tool tip displays. You can save the transfer, however you will not be able to Commit the transfer until the quantity value is corrected.

The screenshot shows the 'Edit' page for a transfer. The 'Sending Site' is Hamilton Elementary and the 'Receiving Site' is GEORGE WASHINGTON ELEMENTARY. The 'Transfer Date' is 2/17/2017 and the 'Status' is Requested. Under 'Products Transferred', there is a table with the following data:

Product #	Description	Brand	Quantity per Purchase Unit	Quantity On Hand	P/U Qty	Purchase Unit Description	S/U Qty	Stock Unit Description
2232-001	Canned Beans	Delmonte	2 1 per Case	9 Case, 1 1	11	Case	2	1

A red box highlights the 'Quantity entered exceeds Quantity on Hand' error message above the P/U Qty field (11) and the S/U Qty field (2).

- Repeat steps 8, 9, and 10 for all products being transferred.
  - If applicable, type a note in the Comment field.
  - Click **Save**. This will leave the Status as Requested, and allows for managing users to approve and commit the transfer.
- If you need to add additional products, remove products, or modify the transfer transaction information, you may modify the transfer as needed later, as long as the transfer has not been submitted, shipped, or received.

The screenshot shows the 'Edit' page for a transfer. The 'Sending Site' is Adams Elementary and the 'Receiving Site' is Central Kitchen. The 'Transfer Date' is 8/13/2018 and the 'Status' is Requested. Under 'Products Transferred', there is a table with the following data:

Product #	Description	Brand	Quantity per Purchase Unit	Quantity On Hand	P/U Qty	Purchase Unit Description	S/U Qty	Stock Unit Description
03-002	CORN, CANNE...	ABC	6 #10 Can pe...	2 Case 6/#10...	1	Case 6/#10	6	#10 Can
18967-001	BREAD,WHEAT	XYZ	24 Slice per L...	1 Loaf (24ct),...	1	Loaf (24ct)	8	Slice

At the bottom of the screen, there is a 'Comment' field and three buttons: 'Cancel', 'Submit', and 'Save'. The 'Save' button is highlighted with a red box.

## Removing a Product from a Transfer Transaction

To remove a product from a transfer transaction, select the check box and click **Remove**. You may only remove a product from the transfer transaction as long as the transaction has not been committed. If the transfer transaction is committed, **Remove** is not visible. The Remove button is not enabled unless a check box is selected.

**Products Transferred**

Search  within Product #, Description, Brand, Vendor Product #

<input type="checkbox"/>	Product #	Description	Brand	Quantity per Purchase Unit	Quantity On Hand	P/U Qty	Purchase Unit Description	S/U Qty	Stock Unit Description
<input checked="" type="checkbox"/>	101010-001	Cheese	Wegmans	6 Block per Case	4 Case, 0 Block	<input type="text" value="1"/>	Case	<input type="text" value="0"/>	Block
<input type="checkbox"/>	11111-001	BEANS	Birds Eye	12 bags per case	8 case, 0 bags	<input type="text" value="5"/>	case	<input type="text"/>	bags

**Remove**      Comment:

To remove all products from a transfer transaction, select the header check box and click **Remove**.

**Products Transferred**

Search  within Product #, Description, Brand, Vendor Product #

<input checked="" type="checkbox"/>	Product #	Description	Brand	Quantity per Purchase Unit	Quantity On Hand	P/U Qty	Purchase Unit Description	S/U Qty	Stock Unit Description
<input checked="" type="checkbox"/>	101010-001	Cheese	Wegmans	6 Block per Case	4 Case, 0 Block	<input type="text" value="1"/>	Case	<input type="text" value="0"/>	Block
<input checked="" type="checkbox"/>	11111-001	BEANS	Birds Eye	12 bags per case	8 case, 0 bags	<input type="text" value="5"/>	case	<input type="text"/>	bags

**Remove**      Comment:

## Modify Transfers

Perform the following procedure to modify a transfer transaction.

1. From the left-hand navigation bar, click **Inventory**.
2. Click **Transfers**.
3. Select your search criteria.  
**Note:** The Transferred Start and End Dates default to the current date. The remaining filters can be left blank.
4. Click **Search**.
5. Click the appropriate Transfer # hyperlink.
6. Perform your changes.  
If the transfer transaction was saved and not committed, you can edit all fields except Sending Site and Receiving site.  
If the transfer transaction was committed, you can only edit Date Transferred and Comment.
7. Click **Save**.

## Delete a Transfer Transaction

You may delete a transfer transaction as long as the transaction has not been committed. If the transfer transaction is committed, **Delete** is not visible.

**Note:** Access to **Delete** is controlled through the security group **Inventory - Transfers**. The user must be assigned to a security group that has the **Allow Delete** check box selected.

1. From the left-hand navigation bar, click **Inventory**.
2. Click **Transfers**.
3. Select your search criteria.  
**Note:** The Transfer Date defaults to the current date. The remaining filters can be left blank.
4. Click **Search**.
5. Click the appropriate **Transfer #** hyperlink.
6. Click **Delete**.
7. At the confirmation prompt, click **Yes**.

## Submitting a Transfer for Approval

After a Site Transfer has been saved, it has the Status of “Requested.” If a requested transfer is ready to be approved, you may opt to Submit the transfer. This lets the warehouse administrator know that the transfer is completely finished and awaiting approval, and it makes it easier to sort transfer requests that are finalized.

**Note:** If you have permissions to Commit Transfers, you will not see a Submit button. Instead, you will see a Commit button and be able to immediately commit a transfer.

1. From the left-hand navigation bar, click **Inventory**.

2. Click **Transfers**.

3. Select your search criteria.

**Note:** Set the Status filter to Requested to show only those transfers that have not yet been submitted.

4. Click **Search**.

5. Click the appropriate Transfer # hyperlink.

6. If the order looks like it is ready, click **Submit**.

The screenshot displays a web form for managing inventory transfers. At the top, there are fields for 'Sending Site' (District Warehouse), 'Receiving Site' (George Washington Elementary), 'Transfer Date' (10/10/2016), 'Status' (Requested), and 'Requisition #'. Below this is a section titled 'Products Transferred' with a search bar and a table of products. The table has columns for Product #, Description, Brand, Quantity per Purchase Unit, Quantity On Hand, P/U Qty, Purchase Unit Description, S/U Qty, and Stock Unit Description. Three products are listed: BEEF,GROUND,85... (Archer), BEEF FLAMEBROI... (Advance Food), and BEANS,SNAP,GRE... (Harvest). At the bottom of the form, there is a 'Remove' button, a 'Comment' field containing 'This is a test', and a row of action buttons: Delete, Cancel, Submit, and Save.

Product #	Description	Brand	Quantity per Purchase Unit	Quantity On Hand	P/U Qty	Purchase Unit Description	S/U Qty	Stock Unit Description
23567-001	BEEF,GROUND,85...	Archer	4 Chub (10#) per...	14 Case (4 Chubs...	1	Case (4 Chubs)	0	Chub (10#)
601476-001	BEEF FLAMEBROI...	Advance Food	5 Sleeve (27ct) p...	24 Case (135ct), ...	1	Case (135ct)	0	Sleeve (27ct)
902432-001	BEANS,SNAP,GRE...	Harvest	6 #10 Can per Ca...	12 Case 6/#10, 2...	1	Case 6/#10	0	#10 Can

7. At the Confirm prompt, click **Continue**. This will change the Status to “Submitted.”

**Note:** If your security group has permissions to Commit Transfers, you will not see a Submit button. Instead, you will see a Commit button and be able to immediately commit a transfer.

The screenshot shows a horizontal row of three buttons: a blue 'Cancel' button, a green 'Commit' button, and a green 'Save' button.

# INVENTORY

## Committing or Rejecting a Submitted Transfer

You may commit (approve) or reject a transfer that is submitted and awaiting approval.

**Note:** The **Commit** and **Reject** functions are controlled through the security group **Ordering - Transfers, Edit Fields - Commit Transfers**.

1. From the left-hand navigation bar, click **Inventory**.
2. Click **Transfers**.
3. Select your search criteria.  
**Note:** Select **Submitted** from the Status drop-down to display orders that need approval.
4. Click **Search**.
5. Click the appropriate Transfer # hyperlink.

Transfer #	Status	Transfer Date	Entered By	Committed Date	Transfer Committed	Receiving #	Received Date	Receiving Committed	Requisition #
2	Submitted	10/10/2016	manager		No			No	

6. Click **Approve** or **Reject**.

7. At the Confirm prompt click **Continue**, or click **Yes** to reject the transfer.

8. Upon completion, the **Site Transfer committed successfully** or **Site Transfer rejected successfully** prompt displays.

## Reverting a Submitted Transfer

Instead of rejecting a transfer, a user may use the Revert button to change a Submitted transfer's status back to Requested, allowing for changes to be made to a transfer before re-submitting.

1. From the left-hand navigation bar, click **Inventory**.
2. Click **Transfers**.
3. Select your search criteria.  
**Note:** Select **Submitted** from the Status drop-down to display transfers that need approval.
4. Click **Search**.
5. Click the appropriate Transfer # hyperlink.

Home > Inventory > Transfers

Sending Site: [Dropdown] Transfer Committed: [Dropdown]  
Receiving Site: [Dropdown] Transferred Start Date: 2/5/2018 [Calendar]  
Status: Submitted [Dropdown] Transferred End Date: 8/13/2018 [Calendar]  
Entered By: [Dropdown] Requisition #: [Text]

Reset Add Search

Transfer #	Status	Transfer Date	Entered By	Committed Date	Transfer Committed	Receiving #	Received Date	Receiving Committed	Requisition #
2	Submitted	10/10/2016	manager		No			No	

6. Click **Revert**.

Reject Revert Cancel Commit Save

7. At the confirmation prompt, click **Yes**.
8. The Status of the Transfer changes from Submitted to Requested, and you may edit the items on the transfer request.

## Warehouse Hotshot Transfers

A Warehouse Hotshot Transfer is a restricted method of transferring inventory from the warehouse and storage sites, which is useful for site users who do not otherwise have permissions to inventory transfer functions. A user must be assigned to the appropriate **Inventory - Warehouse Hotshot Transfers** security group settings to manage transfers. Please refer to the Setup section to provide users the appropriate access to the transfers feature.

The hotshot transfers page does not show item availability or on hand quantities for the warehouse/storage sites. Users who have access to hotshot transfers and not other transfers will need to contact the warehouse or storage site directly to find out if there is enough quantity to request a hotshot transfer.

Perform the following procedure to search for warehouse hotshot transfers.

**Note:** Warehouse transfers made on the **Transfers** page *will not appear* when searching hotshot transfers. Hotshot transfers *will appear* when searching on the **Transfers** page.

1. From the left-hand navigation bar, click **Inventory**.
2. Click **Warehouse Hotshot Transfers**.
3. Select your search criteria.  
**Note:** The Transferred Start and End Dates default to the current date. The remaining filters can be left blank.
4. Click **Search**. The following fields are displayed

Column Label	Description
Transfer #	An ascending numeric hyperlink assigned to the transfer transaction.
Status	The status is system assigned based on the transfer transaction progress. There are five statuses: <b>Requested</b> - Transfer has been processed and saved. A receiving transaction # has not been assigned and the transfer has not been committed. <b>Shipped</b> - The transfer transaction has been committed and a corresponding receiving # has been assigned. The sending site's inventory has been decremented. <b>Received</b> - The transfer transaction has been created and committed; the receiving transaction has been committed at the receiving site; and the inventory has been appropriately incremented. <b>Submitted</b> - The transfer transaction has been created, and the site manager has submitted the order. The transfer is awaiting approval and fulfillment from the warehouse admin. <b>Rejected</b> - The transfer transaction has been rejected.
Transfer Date	The transfer date assigned to the transfer transaction at the time of creation or when it was last edited.
Sending Site	The designated site sending the product.
Entered By	The name of the user that entered the transfer.
Committed Date	The date the transfer transaction was committed.
Transfer Committed	<b>Yes</b> displays when the transfer has been committed. <b>No</b> displays if the transfer has not been committed.
Receiving #	An ascending numeric hyperlink assigned to the receiving transaction.
Received Date	The date the receiving transaction was committed.
Receiving Site	The designated site receiving the product.
Receiving Committed	<b>Yes</b> displays when the receiving transaction has been committed. <b>No</b> displays if the receiving transaction has not been committed.



5. Click the appropriate Transfer # hyperlink.

Home > Inventory > Warehouse Hotshot Transfers

Sending Site:  Transfer Committed:

Receiving Site:  Transferred Start Date:

Status:  Transferred End Date:

Entered By:

Transfer #	Status	Transfer Date	Sending Site	Entered By	Committed Date	Transfer Committed	Receiving #	Received Date	Receivii Commit
<a href="#">59</a>	Submitted	11/29/2018	District Ware...	manager		No			No
<a href="#">60</a>	Requested	11/30/2018	District Ware...	manager		No			No
<a href="#">61</a>	Requested	11/30/2018	District Ware...	manager		No			No

## Adding a Hotshot Transfer

Perform the following procedure to add a site transfer transaction.

1. From the left-hand navigation bar, click **Inventory**.
2. Click **Warehouse Hotshot Transfers**.
3. Click **Add**.

Home > Inventory > Warehouse Hotshot Transfers

Sending Site:  Transfer Committed:

Receiving Site:  Transferred Start Date:

Status:  Transferred End Date:

Entered By:

# INVENTORY

4. Select a Warehouse or Storage Location from the **Sending Site** drop-down.
5. Select a Site from the **Receiving Site** drop-down.
6. Select a **Transfer Date**. This field defaults to the current date.

**Note:** The **Status** field is a read-only field. When adding a transfer, the Status displays as **Requested**.

Home > Inventory > Warehouse Hotshot Transfers > Edit

Sending Site: District Warehouse      Transfer Date: 11/29/2018

Receiving Site: Adams Elementary      Status: Requested

7. When adding products to the transfer transaction, you have the ability to search by Product and include various fields, or by Product Group. Click **Search** and then select your preferred search criteria. The default search includes all fields. If you leave the Transfer Edit screen the search resets to the default and all check boxes are selected.

### By Product and fields:

Search Search Products... within Product #, Description, Brand, Vendor Product #

By Product

Include fields:

- Product #
- Description
- Brand
- Vendor Product #

Description	Brand	Quantity per Purchase Unit	Quantity On Hand	P/U Qty	Purchase Unit Description	S/U Qty	Stock Unit Description
-------------	-------	----------------------------	------------------	---------	---------------------------	---------	------------------------

### By Product Group:

Search Search Product Groups... within Product Group Name

Product Group Name	Purchase Unit Description	Order Qty	Purchase Unit Price	Total
Mosaic Test				
Produce				

8. Enter a product #, description, brand, or vendor product # in the Search field, and then click the product to add it to the Products Transferred list.

Home > Inventory > Warehouse Hotshot Transfers > Edit

Sending Site: District Warehouse      Transfer Date: 11/29/2018

Receiving Site: Adams Elementary      Status: Requested

Products Transferred

Search ch within Product #,

Product #	Description	Brand	Unit	S/U Qty	Stock Unit Description
1042-001	CHEESE PAST PROCESS AMERIC	Land O Lakes			
23567-001	BEEF,GROUND,85% LN MEAT / 1...	Archer	Unit	Qty	Description
45566-001	ROLLS, FRENCH	wonder			
9240-002	PEACHES,CND,LT SYRUP				

# INVENTORY

9. Enter the **P/U Qty** (Purchase Unit Quantity). This value must be less than or equal to the purchase unit quantity on hand.
10. Enter the **S/U Qty** (Stock Unit Quantity). This value must be less than or equal to the stock unit quantity on hand.

Depending on the permissions of your Security Group, Stock Unit Quantity may have a decimal value if only part of a stock unit is available. For example, if an item has a stock unit of “Bag”, but there is currently half of a full Bag left in stock, add 0.5 to indicate the half of a Bag in inventory.

**Note:** When entering Purchase Unit Quantity and Stock Unit Quantity a validation occurs and identifies if the transfer results in a negative quantity on hand by displaying a red field tag. When you hover the mouse over the field tag the **Quantity Entered exceeds Quantity on Hand** tool tip displays. You can save the transfer, however you will not be able to Commit the transfer until the quantity value is corrected.

Sending Site: District Warehouse      Transfer Date: 11/29/2018  
Receiving Site: Adams Elementary      Status: Requested

Products Transferred

Search Products... within Product #,

Product #	Description	Brand	Quantity ... Purchase ...	Quantity On Hand	P/U Qty	Purchase Unit Description	S/U Qty	Stock Unit Description
23567-001	BEEF,GRO...	Archer	4 Chub (10...	14 Case (4...	10	Case (4 Chubs)	8	Chub (10#)

11. Repeat steps 8, 9, and 10 for all products being transferred.
12. If applicable, type a note in the Comment field.
13. Click **Save**. This will leave the Status as Requested, and allows for managing users to approve and commit the transfer.

If you need to add additional products, remove products, or modify the transfer transaction information, you may modify the transfer as needed later, as long as the transfer has not been submitted, shipped, or received.

Sending Site: District Warehouse      Transfer Date: 11/29/2018  
Receiving Site: Adams Elementary      Status: Requested

Products Transferred

Search Products... within Product #, Description,

Brand

Product #	Description	Brand	Quantity p... Purchase ...	Quantity On Hand	P/U Qty	Purchase Unit Description	S/U Qty	Stock Unit Description
23567-001	BEEF,GRO...	Archer	4 Chub (10...	14 Case (4 ...	10	Case (4 Chubs)	8	Chub (10#)

Remove      Comment:

Cancel      Submit      **Save**

## Removing a Product from a Hotshot Transfer

To remove a product from a hotshot transfer, select the check box and click **Remove**. You may only remove a product from the hotshot transfer as long as the transfer has not been committed. If the transfer is committed, **Remove** is not visible. The Remove button is not enabled unless a check box is selected.

Products Transferred

Search  within Product #, Description, Brand, Vendor Product #

<input type="checkbox"/>	Product #	Description	Brand	Quantity per Purchase Unit	Quantity On Hand	P/U Qty	Purchase Unit Description	S/U Qty	Stock Unit Description
<input checked="" type="checkbox"/>	101010-001	Cheese	Wegmans	6 Block per Case	4 Case, 0 Block	<input type="text" value="1"/>	Case	<input type="text" value="0"/>	Block
<input type="checkbox"/>	11111-001	BEANS	Birds Eye	12 bags per case	8 case, 0 bags	<input type="text" value="5"/>	case	<input type="text"/>	bags

Comment:

To remove all products from a hotshot transfer, select the header check box and click **Remove**.

Products Transferred

Search  within Product #, Description, Brand, Vendor Product #

<input checked="" type="checkbox"/>	Product #	Description	Brand	Quantity per Purchase Unit	Quantity On Hand	P/U Qty	Purchase Unit Description	S/U Qty	Stock Unit Description
<input checked="" type="checkbox"/>	101010-001	Cheese	Wegmans	6 Block per Case	4 Case, 0 Block	<input type="text" value="1"/>	Case	<input type="text" value="0"/>	Block
<input checked="" type="checkbox"/>	11111-001	BEANS	Birds Eye	12 bags per case	8 case, 0 bags	<input type="text" value="5"/>	case	<input type="text"/>	bags

Comment:

## Modify Hotshot Transfers

Perform the following procedure to modify a hotshot transfer.

1. From the left-hand navigation bar, click **Inventory**.
2. Click **Warehouse Hotshot Transfers**.
3. Select your search criteria.  
**Note:** The Transferred Start and End Dates default to the current date. The remaining filters can be left blank.
4. Click **Search**.
5. Click the appropriate Transfer # hyperlink.
6. Perform your changes.  
If the hotshot transfer was saved and not committed, you can edit all fields except Sending Site and Receiving site.  
If the hotshot transfer was committed, you can only edit Date Transferred and Comment.
7. Click **Save**.

## Delete a Hotshot Transfer

You may delete a hotshot transfer as long as the transfer has not been committed. If the hotshot transfer is committed, **Delete** is not visible.

**Note:** Access to **Delete** is controlled through the security group **Inventory - Warehouse Hotshot Transfers**. The user must be assigned to a security group that has the **Allow Delete** check box selected.

1. From the left-hand navigation bar, click **Inventory**.
2. Click **Warehouse Hotshot Transfers**.
3. Select your search criteria.  
**Note:** The Transfer Date defaults to the current date. The remaining filters can be left blank.
4. Click **Search**.
5. Click the appropriate **Transfer #** hyperlink.
6. Click **Delete**.
7. At the confirmation prompt, click **Yes**.

## Submitting a Hotshot Transfer for Approval

After a hotshot transfer has been saved, it has the Status of “Requested.” If a requested transfer is ready to be approved, you may opt to Submit the transfer. This lets the warehouse administrator know that the transfer is completely finished and awaiting approval, and it makes it easier to sort transfer requests that are finalized.

**Note:** If you have permissions to Commit Transfers, you will not see a Submit button. Instead, you will see a Commit button and be able to immediately commit a transfer.

1. From the left-hand navigation bar, click **Inventory**.

2. Click **Warehouse Hotshot Transfers**.

3. Select your search criteria.

**Note:** Set the Status filter to Requested to show only those transfers that have not yet been submitted.

4. Click **Search**.

5. Click the appropriate Transfer # hyperlink.

6. If the order looks like it is ready, click **Submit**.

The screenshot shows a web form for submitting a hotshot transfer. At the top, there are fields for 'Sending Site' (District Warehouse), 'Receiving Site', 'Transfer Date' (11/29/2018), and 'Status' (Requested). Below this is a section titled 'Products Transferred' with a search bar and a table. The table has columns for Product #, Description, Brand, Quantity per Purchase Unit, Quantity On Hand, P/U Qty, Purchase Unit Description, S/U Qty, and Stock Unit Description. Two products are listed: BEEF,GROUND,85... (Archer) and BEANS,SNAP,GRE... (Harvest). At the bottom of the form, there is a 'Remove' button, a 'Comment' field containing 'This is a test.', and a row of buttons: Delete, Cancel, Submit, and Save.

Product #	Description	Brand	Quantity per Purchase Unit	Quantity On Hand	P/U Qty	Purchase Unit Description	S/U Qty	Stock Unit Description
23567-001	BEEF,GROUND,85...	Archer	4 Chub (10#) per...	14 Case (4 Chubs...	10	Case (4 Chubs)	8	Chub (10#)
902432-001	BEANS,SNAP,GRE...	Harvest	6 #10 Can per Ca...	12 Case 6/#10, 2...	2	Case 6/#10	2	#10 Can

7. At the Confirm prompt, click **Continue**. This will change the Status to “Submitted.”

**Important:** Once a hotshot transfer is Submitted, it must be committed, reverted, or rejected on the **Inventory - Transfers** page, not the page for warehouse hotshot transfers. For more information on committing, reverting, or rejecting a transfer, see the section on Transfers.

**Note:** If your security group has permissions to Commit Transfers, you will not see a Submit button. Instead, you will see a Commit button and be able to immediately commit a transfer.

A row of three buttons: Cancel (blue), Commit (green), and Save (green).

# ORDERING

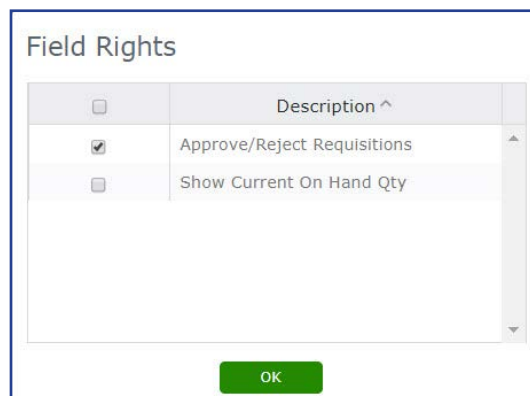
## Ordering Overview

Ordering is used to create orders that are delivered to your sites and manage requisitions.



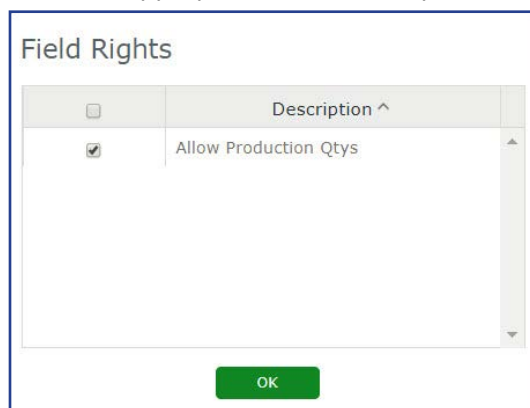
## Requisitions

You may add, edit, and remove requisitions. A user must be assigned to the appropriate Ordering - Requisitions security group settings to manage requisitions. Additional permissions may be controlled by clicking the *Edit Fields* option and selecting the appropriate action. Please refer to the Setup section to provide users the appropriate access to requisitions.



You may import menu plan requirements from existing menus. During the import process, product requirements are generated based on Ingredients linked to Products and the Yield Factor % is taken into account. Import product requirements are brought into the system based on the planned quantities entered into a menu plan. The system uses the product linked to the ingredient and the item used from the product is prioritized first based on the product info tab for the ingredient.

A user must be assigned to the appropriate Menus - Maintenance security group settings to allow production quantities. Additional permissions may be controlled by clicking the *Edit Fields* option and selecting the appropriate action. Please refer to the Setup section to provide users the appropriate access to requisitions.



## Searching Requisitions

Perform the following procedure to search for a requisition.

1. From the left-hand navigation bar, click **Ordering**.
2. Click **Requisitions**.
3. Select your search criteria.  
**Note:** The filters can be left blank to display all requisitions in the search results.
4. Click **Search**. The following fields are displayed:

Column Label	Description
Requisition #	An ascending numeric hyperlink based on the requisition progress.
Status	The status is system assigned based on the requisition process. There are four statuses. Saved - The requisition has been entered and saved. You can edit the Delivery Date, add and remove products, update order quantity fields, and the Comment field. Submitted - The requisition has been submitted, but not yet approved. If you do not have Approve/Reject Order privileges, you can only view the requisition. Approved - The requisition has been submitted and approved. If you have Approve/Reject Orders privileges, you can only edit the Comment field. If you do not have Approve/Reject Order privileges, you can only view the requisition. Rejected - The requisition has been rejected by the approver. You can only view the requisition.
Requested Delivery Date	The requested delivery date assigned to the requisition.
Site	The site assigned to receive the delivery.
Entered By	The name of the user that entered the requisition.
Approval Date	The date the requisition was approved.
Approved By	The name of the user that approved the requisition.
Vendor Orders	The value represents the number of vendor orders created from the requisition.
Internal Transfers	The value represents the number of internal transfer orders created from the requisition.
Warehouse Orders	The value represents the number of warehouse orders created from the requisition.



- Click the appropriate Requisition # hyperlink.

**Note:** You may also click on the Vendor Orders link, Internal Transfers link, or Warehouse Orders link to be redirected to the respective order area in the system.

The screenshot shows the 'Requisitions' page with a search form at the top and a table of requisitions below. The search form includes fields for Requisition #, Site, Site Group, Entered By, Approved By, Status, Requested Delivery Start Date, Requested Delivery End Date, Approval Start Date, and Approval End Date. Below the form is a table with columns: Req #, Status, Requested Delivery Date, Site, Entered By, Approval Date, Approved By, Vendor Orders, Internal Transfers, and Warehouse Orders. The table contains 7 rows of requisitions, with the first row highlighted in red.

Req #	Status	Requested Delivery Date	Site	Entered By	Approval Date	Approved By	Vendor Orders	Internal Transfers	Warehouse Orders
1	Approved	06/22/2017	Adams Elementary	Troy	06/08/2017	Troy	1		
2	Approved	07/18/2017	Adams Elementary	manager	07/17/2017	manager	1		
3	Approved	07/18/2017	Central Kitchen	manager	07/17/2017	manager	1		
4	Approved	07/25/2017	George Washington E...	manager	07/25/2017	manager	1		
5	Approved	07/25/2017	George Washington E...	manager	07/25/2017	manager	1	1	
6	Approved	07/25/2017	George Washington E...	manager	07/25/2017	manager	1	2	
7	Approved	09/11/2017	Lincoln Elementary	manager	09/11/2017	manager			

## Adding a Requisition

Perform the following procedure to add a requisition.

- From the left-hand navigation bar, click **Ordering**.
- Click **Requisitions**.
- Click **Add**.
- From the **Site** drop-down, select the appropriate location. This field is required.
- Select a **Requested Delivery Date** using the date picker. This field is required.
- When adding products to the requisition, you have the ability to search by Product and include various fields, or by Product Group. Click **Search** and then select your preferred search criteria. The default search includes all fields. If you leave the Requisitions Edit screen the search resets to the default and all check boxes are selected.

### By Product and fields:

The screenshot shows the 'Products Requested' section with a search bar and a table. The search bar has a dropdown menu open showing 'By Product' selected. The table has columns: Description, Brand, Source, Purchase Unit Description, Quantity On Hand, Quantity Requested, Purchase Unit Price, and Total. The search criteria are set to 'within Product #, Description, Manufacturer, Brand'. The table contains one row for 'Peaches' by 'Briggs'.

Description	Brand	Source	Purchase Unit Description	Quantity On Hand	Quantity Requested	Purchase Unit Price	Total
Peaches	Briggs		Case175ct/Each...	0 Case175ct/Ea...	2	15.34	30.68

### By Product Group:

The screenshot shows the 'Products Requested' section with a search bar and a table. The search bar has a dropdown menu open showing 'By Product Group' selected. The table has columns: Product #, Description, Manufacturer, Brand, Quantity On Hand, Quantity Requested, Purchase Unit Price, and Total. The search criteria are set to 'within Product #, Description, Manufacturer, Brand'. The table contains three rows for 'Beef Pattie, Broiled', 'Beef Steak, Breaded Whole Grain', and 'Beef Steak, Breaded Whole Grain'.

Product #	Description	Manufacturer	Brand	Quantity On Hand	Quantity Requested	Purchase Unit Price	Total
1002-001	Beef Pattie, Broiled	Briggs Frozen	Advance				
1004-001	Beef Steak, Breaded Whole Grain	Briggs Frozen	Don Lee Farms				
10168-001	Beef Steak, Breaded Whole Grain	Briggs Frozen	Don Lee Farms				

# ORDERING

7. Enter the desired value in Quantity Requested field.  
**Note:** The *Quantity On Hand* column displays current inventory counts. You should adjust requested quantities accordingly. This will assist in preventing over-ordering of inventory.  
**Note:** Depending on Product Fulfillment, Delivery Date, and Quantity Requested, site-to-site transfers may be generated in conjunction with Vendor Orders and Warehouse Orders.
8. Repeat steps 6 and 7 for each item.
9. If applicable, type a note in the Comment field.
10. If you need to add additional products, remove products, or modify the requisition, click **Save**.

Home > Ordering > Requisitions > Edit

Site: District Warehouse Requested Delivery Date: 10/12/2018  
Requisition #: 28 Saved Date: 10/11/2018  
Status: Saved Submitted Date:  
Approved Date:

Products Requested:

Search Search Products... within Product #, Description, Manufacturer, Brand

<input type="checkbox"/>	Product Item Number	Description	Brand	Source	Purchase Unit Description	Quantity On Hand	Quantity Requested	Purchase Unit Price	Total
<input type="checkbox"/>	9236-001	PEACHES, FRESH	ABC	Sysco	Case 113ct	0 Case 113ct, 0...	<input type="text" value="0"/>	18.6900	0.0000
<input type="checkbox"/>	11124-001	CARROTS, RAW	ABC	Sysco	Case 4/5# Bags	0 Case 4/5# Ba...	<input type="text" value="4"/>	10.2300	40.9200
<input type="checkbox"/>	2345-001	HOTDOG ROLL...	Wonder	Sysco	case	0 case, 0 loaf	<input type="text" value="0"/>	8.7900	0.0000
<input type="checkbox"/>	02-001	ROLLS, HAMBU...	SARAH LEE	District Wareho...	CASE 6/BAGS	390 CASE 6/BA...	<input type="text" value="3"/>		
<input type="checkbox"/>	902432-001	BEANS, SNAP, G...	Harvest	District Wareho...	Case 6/#10	12 Case 6/#10,...	<input type="text" value="0"/>		

Remove Import Menus Comment: Enter any comments about the requisition Requisition Total: 40.9200

Print Delete Cancel Approve Save

11. Click **Submit** (if you do not have Approve/Reject Orders privileges) when you are ready to submit the requisitions.
12. At the confirmation prompt, click **Continue**.
13. Upon completion the **Requisition added successfully** or the **Requisition approved and export successfully** prompt displays.

**Note:** You may print a Requisition with the **Print** button.

## Importing Menus for Sites

When creating or editing a requisition, you may import menu requirements from existing menus.

1. On the Requisition Edit page, select the site from the **Site** drop-down menu. This field is required.
2. Optionally, select a **Requested Delivery Date** using the date picker.
3. Click **Import Menus**.

Site: Adams Elementary Requested Delivery Date:

Requisition #: Saved Date:

Status: Submitted Date:

Approved Date:

Products Requested:

Search Products... within Product #, Description, Manufacturer, Brand

<input type="checkbox"/>	Product Item Number	Description	Brand	Source	Purchase Unit Description	Quantity On Hand	Quantity Requested	Purchase Unit Price	Total

Comment:  Requisition Total: 0.0000

4. Select one or more menus from the Menu Name drop-down menu.
5. Select a Site or Site Group from the drop-down menus, then select which products to include in your search.
6. Enter a Menu Start Date and a Menu End Date.
7. Click **Search**.
8. Place a checkmark in each box that you would like to include in the import.
9. Click **Select**.

Home > Ordering > Requisitions > Edit

Central Kitchen Name: Central Kitchen Menu Start Date: 10/5/2020

Menu Name: Menu End Date: 10/5/2020

Site:

Site Group:

Products to Include:

<input type="checkbox"/>	Menu #	Menu Name	Menu Date	Serving Period	Grade / Age Group	Planned
<input type="checkbox"/>	6	6 HHFKA Lunch K-5	10/09/2020	Lunch	K-5 (age 5-10)	Yes
<input checked="" type="checkbox"/>	6	6 HHFKA Lunch K-5	10/10/2020	Lunch	K-5 (age 5-10)	Yes
<input type="checkbox"/>	6	6 HHFKA Lunch K-5	10/11/2020	Lunch	K-5 (age 5-10)	Yes
<input checked="" type="checkbox"/>	6	6 HHFKA Lunch K-5	10/12/2020	Lunch	K-5 (age 5-10)	Yes
<input checked="" type="checkbox"/>	6	6 HHFKA Lunch K-5	10/13/2020	Lunch	K-5 (age 5-10)	Yes

10. Complete any other necessary actions. When you are done, click **Save** or **Approve**.

## Importing Menus for Warehouses

When creating or editing a requisition, you may import menu requirements from existing menus.

1. On the Requisition Edit page, select the warehouse from the **Site** drop-down menu. This field is required.
2. Optionally, select a **Requested Delivery Date** using the date picker.
3. Click **Import Menus**.

Site:  Requested Delivery Date:

Requisition #:  Saved Date:

Status:  Submitted Date:

Approved Date:

**Products Requested:**

Search Products... within Product #, Description, Manufacturer, Brand

<input type="checkbox"/>	Product Item Number	Description	Brand	Source	Purchase Unit Description	Quantity On Hand	Quantity Requested	Purchase Unit Price	Total

Comment:  Requisition Total: 0.0000

4. Select one or more menus from the Menu Name drop-down menu.
5. Enter a Menu Start Date and a Menu End Date.
6. Select one or more sites from the Site drop-down menu, or select one or more site groups from the Site Group drop-down menu.
7. Click **Search**.
8. Place a checkmark in each box that you would like to include in the import.
9. Click **Select**.

Home > Ordering > Requisitions > Edit

Warehouse Name:  Menu Start Date:

Menu Name:  Menu End Date:

Site:

Site Group:

<input type="checkbox"/>	Menu #	Menu Name	Site Name	Menu Date	Serving Period	Grade / Age ...	Planned
<input checked="" type="checkbox"/>	5	OBMP Lunch	George Washin...	11/13/2017	Lunch	K-8 (age 5-13)	Yes
<input checked="" type="checkbox"/>	5	OBMP Lunch	Adams Elemen...	11/13/2017	Lunch	K-8 (age 5-13)	Yes

10. Complete any other necessary actions. When you are done, click **Save** or **Approve**.

## Removing a Product from a Requisition

To remove a product from a requisition, select the check box and click **Remove**. You may only remove a product from the requisition as long as the requisition has not been approved. If the requisition is submitted or approved, **Remove** is not visible. The Remove button is not enabled unless a check box has been selected.

Products Requested:

Search  within Product #, Description, Manufacturer, Brand

<input type="checkbox"/>	Product Item Number	Description	Brand	Source	Purchase Unit Description	Quantity On Hand	Quantity Requested	Purchase Unit Price	Total
<input type="checkbox"/>	10168-001	Peaches	Briggs		Case175ct/Each...	0 Case175ct/Ea...	<input type="text" value="2"/>	15.34	30.68
<input type="checkbox"/>	1018-001	Chicken Breast ...	Chic'n Time	Hometown Foo...	Case 2/Each 5lb...	0 Case 2/Each ...	<input type="text" value="13"/>	18.94	246.22
<input type="checkbox"/>	1616-001	Potatoes, FF, Cr...	Simplot		Case 6/Each 5lb...	0 Case 6/Each ...	<input type="text" value="1"/>	19.77	19.77
<input checked="" type="checkbox"/>	1212-001	Z-Bread Slice WG	Super Bakery		Case 70ct/Each...	0 Case 70ct/Ea...	<input type="text" value="5"/>	35.82	179.10
<input type="checkbox"/>	10169-002	Green Beans	Libby's		Case 6/#10 can	0 Case 6/#10 c...	<input type="text" value="1"/>	3.29	3.29

**Remove** **Import Menus** Comment:  Requisition Total: 479.06

**Delete** **Cancel** **Approve** **Save**

To remove all products from a requisition, select the header check box and click **Remove**.

Products Requested:

Search  within Product #, Description, Manufacturer, Brand

<input checked="" type="checkbox"/>	Product Item Number	Description	Brand	Source	Purchase Unit Description	Quantity On Hand	Quantity Requested	Purchase Unit Price	Total
<input checked="" type="checkbox"/>	10168-001	Peaches	Briggs		Case175ct/Each...	0 Case175ct/Ea...	<input type="text" value="2"/>	15.34	30.68
<input checked="" type="checkbox"/>	1018-001	Chicken Breast ...	Chic'n Time	Hometown Foo...	Case 2/Each 5lb...	0 Case 2/Each ...	<input type="text" value="13"/>	18.94	246.22
<input checked="" type="checkbox"/>	1616-001	Potatoes, FF, Cr...	Simplot		Case 6/Each 5lb...	0 Case 6/Each ...	<input type="text" value="1"/>	19.77	19.77
<input checked="" type="checkbox"/>	1212-001	Z-Bread Slice WG	Super Bakery		Case 70ct/Each...	0 Case 70ct/Ea...	<input type="text" value="5"/>	35.82	179.10
<input checked="" type="checkbox"/>	10169-002	Green Beans	Libby's		Case 6/#10 can	0 Case 6/#10 c...	<input type="text" value="1"/>	3.29	3.29

**Remove** **Import Menus** Comment:  Requisition Total: 479.06

**Delete** **Cancel** **Approve** **Save**

## Approving or Rejecting a Requisition

You may approve or reject a requisition that is submitted and awaiting approval.

**Note:** The **Approve** and **Reject** functions are controlled through the security group **Ordering - Requisitions, Edit Fields - Approve/Reject Requisitions**.

1. From the left-hand navigation bar, click **Ordering**.
2. Click **Requisitions**.
3. Select your search criteria.

**Note:** Select **Submitted** from the Status drop-down to display orders that need approval.

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4. Click **Search**.
5. Click the appropriate Requisition # hyperlink.

Requisition #	Status	Requested Delivery Date	Site	Entered By	Approval Date	Approved By	Vendor Orders	Internal Orders
7	Submitted	07/12/2017	Hamilton Elem...	Molly				

6. Click **Approve** or **Reject**.

7. At the Approve confirmation prompt click **Continue**, or click **Yes** to reject the requisition.

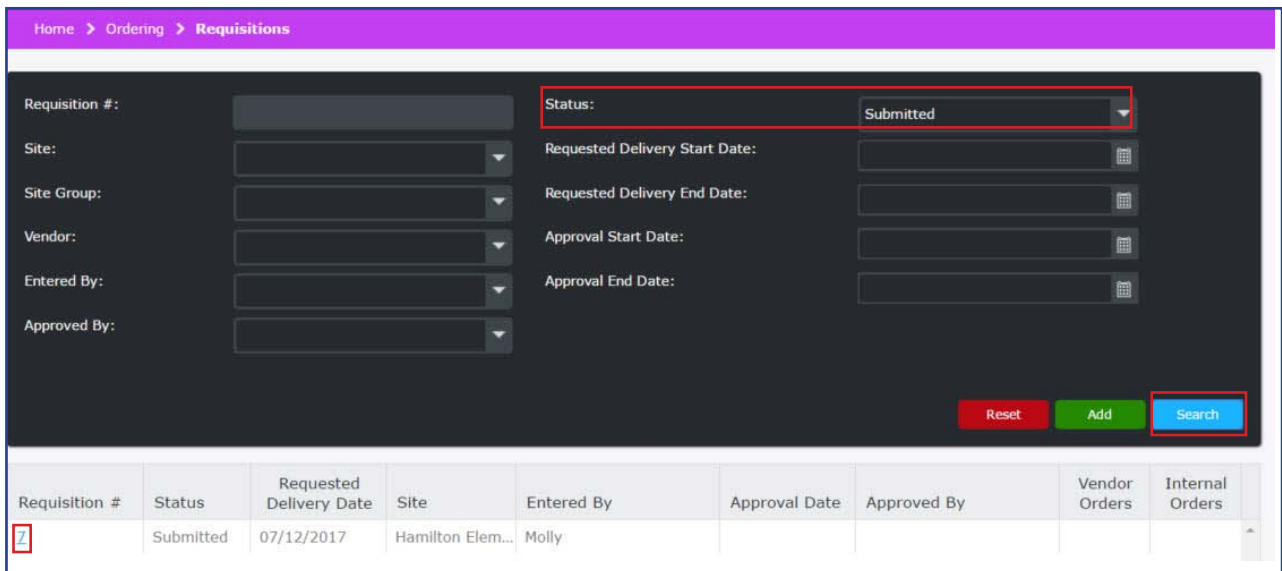
8. Upon completion the **Requisition approved successfully** or **Requisition rejected successfully** prompt displays.

**Note:** Upon approval of a requisition, a saved order is created for each vendor listed in the requisition and includes the approved items and specified quantities.

## Reverting a Requisition

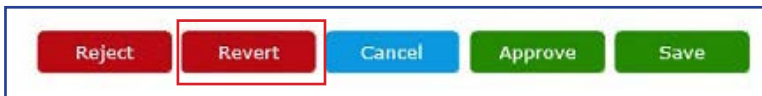
Instead of rejecting a requisition, a user may use the Revert button to change a Submitted order's status back to Saved, allowing for changes to be made for a re-submitted requisition.

1. From the left-hand navigation bar, click **Ordering**.
2. Click **Requisitions**.
3. Select your search criteria.  
**Note:** Select **Submitted** from the Status drop-down to display orders that need approval.
4. Click **Search**.
5. Click the appropriate Requisition # hyperlink.



Requisition #	Status	Requested Delivery Date	Site	Entered By	Approval Date	Approved By	Vendor Orders	Internal Orders
<a href="#">7</a>	Submitted	07/12/2017	Hamilton Elem...	Molly				

6. Click **Revert**.



Buttons: **Reject** (red), **Revert** (red, highlighted), **Cancel** (blue), **Approve** (green), **Save** (green)

7. The Status of the Requisition changes from Submitted to Saved, and you may edit the items on the requisition.



## Deleting a Requisition

You may delete a requisition as long as the requisition has not been approved. If the requisition is submitted with approval, **Delete** is not visible.

**Note:** Access to **Delete** is controlled through the security group **Ordering - Requisitions**. The user must be assigned to a security group that has the **Allow Delete** check box selected.

1. From the left-hand navigation bar, click **Ordering**.
2. Click **Requisitions**.
3. Select your search criteria.  
**Note:** Select **Saved** from the Status drop-down to display requisitions that have not been submitted for approval.
4. Click **Search**.
5. Click the appropriate Requisition # hyperlink.

Home > Ordering > Requisitions > Edit

Site: Hamilton Elementary Requested Delivery Date: 6/9/2017  
Requisition #: Z Saved Date: 5/31/2017  
Status: Saved Submitted Date:  
Approved Date:

Products Requested:

Search Search Products... within Product #, Description, Manufacturer, Brand

<input checked="" type="checkbox"/>	Product Item Number	Description	Brand	Source	Purchase Unit Description	Quantity On Hand	Quantity Requested	Purchase Unit Price	Total
<input checked="" type="checkbox"/>	10168-001	Peaches	Briggs		Case175ct/Each...	0 Case175ct/Ea...	2	15.34	30.68
<input checked="" type="checkbox"/>	1018-001	Chicken Breast ...	Chic'n Time	Hometown Foo...	Case 2/Each 5lb...	0 Case 2/Each ...	13	18.94	246.22
<input checked="" type="checkbox"/>	1616-001	Potatoes, FF, Cr...	Simplot		Case 6/Each 5lb...	0 Case 6/Each ...	1	19.77	19.77
<input checked="" type="checkbox"/>	1212-001	Z-Bread Slice WG	Super Bakery		Case 70ct/Each...	0 Case 70ct/Ea...	5	35.82	179.10
<input checked="" type="checkbox"/>	10169-002	Green Beans	Libby's		Case 6/#10 can	0 Case 6/#10 c...	1	3.29	3.29

Remove Import Menus Comment: Enter any comments about the requisition. Requisition Total: 479.06

Delete Cancel Approve Save

6. Click **Delete**.

Warning

Are you sure you want to delete this Requisition?

Yes No

7. At the delete confirmation prompt, click **Yes**.
8. Upon completion, the **Requisition deleted successfully** prompt displays.



# ORDERING

## Vendor Orders

A user must be assigned to the appropriate **Ordering - Vendor Orders** security group settings to manage vendor orders. Please refer to the Setup section to provide users the appropriate access to vendor orders. Perform the following procedure to search for a vendor orders.

1. From the left-hand navigation bar, click **Ordering**.
2. Click **Vendor Orders**.
3. Select your search criteria.  
**Note:** The filters can be left blank to display all orders in the search results.
4. Click **Search**. The following fields are displayed:

Column Label	Description
Order #	An ascending numeric hyperlink based on the vendor order.
Status	The status is system assigned based on the requisition process. There are five statuses. Saved - The order has been entered and saved. You can edit the Delivery Date, add and remove products, update order quantity fields, and the Comment field. Submitted - The order has been submitted, but not yet approved. If you do not have Approve/Reject Order privileges, you can only view the order. Approved - The order has been submitted and approved. If you have Approve/Reject Orders privileges, you can only edit the Delivery Date, Comment field and Shipping Fee. If you do not have Approve/Reject Order privileges, you can only view the order. Received - The assigned site has received the order and the receiving transaction was committed. Rejected - The order has been rejected by the approver. You can only view the order.
Delivery Date	The requested delivery date assigned to the order.
Site	The site assigned to receive the delivery.
Vendor	The vendor assigned to deliver the order.
Entered By	The name of the user that entered the vendor order.
Approval Date	The date the order was approved.
Approved By	The name of the user that approved the vendor order.
Receiving #	An ascending numeric hyperlink assigned to the receiving transaction.
Receiving Date	The date the order was received.
Receiving Committed	<b>Yes</b> displays when the transaction has been committed.
Requisition #	The value represents the requisition number if an order was created through a requisition.

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- Click the appropriate Order # hyperlink.

**Note:** You may also click on the Requisition # link to be redirected to the respective requisition order in the system.

Home > Ordering > Vendor Orders

Order #:  Status:

Site:  Delivery Start Date:

Vendor:  Delivery End Date:

Entered By:  Approval Start Date:

Approved By:  Approval End Date:

[View Report](#) [Reset](#) [Add](#) [Search](#)

Order #	Status	Delivery Date	Site	Vendor	Entered By	Approval Date	Approved By	Receiving #	Received Date	Receiving Committed
<a href="#">1</a>	Saved	09/30/2016	GEORGE WASHINGT...	Vendor	Gloria J					No
<a href="#">2</a>	Approved	10/03/2016	Hamilton Elementary	Bread Company	Gloria J	09/28/2016	Gloria J	<a href="#">5</a>		No
<a href="#">3</a>	Received	09/30/2016	GEORGE WASHINGT...	Anderson Water	Gloria J	09/27/2016	Gloria J	<a href="#">3</a>	09/28/2016	Yes
<a href="#">4</a>	Received	09/30/2016	GEORGE WASHINGT...	Vendor	Brenna	09/28/2016	Gloria J	<a href="#">4</a>	09/28/2016	Yes
<a href="#">5</a>	Rejected	10/03/2016	Hamilton Elementary	Bread Company	Brenna	09/28/2016	Gloria J			No
<a href="#">6</a>	Submitted	10/03/2016	Hamilton Elementary	Vendor	Brenna					No

## View Report

Click View Report to generate a Purchase Order report that can be submitted to a vendor. Refer to the Reports section, Purchase Order report for details.

**MOSAIC  
Purchase Order**

**Approved Date:** 9/28/2016  
**Order #:** 4  
**Customer #:** 558541

**Vendor** Vendor **Ship to** GEORGE WASHINGTON ELEMENTARY

123 Main Street  
 Anywhere, NY 11212

**Phone** 585-555-1212 Ext: 1212 **585-555-7474**

**Fax** 585-555-1000

**Email** vendor@email.com

**Delivery Date**

Product #	Vendor	District	Description	Brand	Qty	Unit	Unit Price	Line Price
	334	1111-001	Napkins	Kleenex	2	case(10)	\$25.00	\$50.00
	55858	4038-001	Safety Gloves		15	each	\$25.50	\$382.50
	345334	11785-001	GOURD,DISHCLOTH (TOWELGOURD),CKD,BLD ,DRND,W/S	Towels	5	12	\$15.00	\$75.00
<b>Total</b>								<b>\$507.50</b>

## Adding a Vendor Order

Perform the following procedure to add a vendor order.

1. From the left-hand navigation bar, click **Ordering**.
2. Click **Vendor Orders**.
3. Click **Add**.
4. From the Site drop-down, select the appropriate location. This field is required.
5. From the Vendor drop-down, select the appropriate Vendor. This field is required.
6. Select a Delivery Date using the date picker.
7. When adding products to the vendor order, you have the ability to search by Product and include various fields, or by Product Group. Click **Search** and then select your preferred search criteria. The default search includes all fields. If you leave the Vendor Edit screen the search resets to the default and all check boxes are selected.

### By Product and fields:

The screenshot shows the 'Products Ordered' search interface. The search criteria is set to 'By Product'. The search field contains the text 'Please select a Site and a Vendor'. A red box highlights the search criteria dropdown menu, which is expanded to show 'Include fields:' with four checked options: 'Product #', 'Description', 'Brand', and 'Vendor Product #'. Another red box highlights the search scope dropdown, which is set to 'within Product #, Description, Brand, Vendor Product #'. The table below the search field has columns: Description, Brand, Vendor Product #, Purchase Unit Description, Order Qty, Purchase Unit Price, and Total.

### By Product Group:

The screenshot shows the 'Products Ordered' search interface. The search criteria is set to 'By Product Group'. The search field contains the text 'Search Product Groups...'. A red box highlights the search scope dropdown, which is set to 'within Product Group Name'. The table below the search field has columns: Product Group Name, Purchase Unit Description, Order Qty, Purchase Unit Price, and Total. The 'Product Group Name' column lists 'Canned Storage', 'Produce', and 'Supplies'.

8. Enter a product #, description, brand, or vendor product # in the Search field, and then click the product to add it to the Vendor Order.

The screenshot shows the 'Products Ordered' search interface. The search criteria is set to 'By Product'. The search field contains the text 'a'. A red box highlights the search scope dropdown, which is set to 'within Product #, Description, Brand, Vendor Product #'. The table below the search field has columns: Product #, Description, Brand, Vendor Product #, P/U Price, P/U Desc, and Price List Date Range. The table contains three rows of search results:

Product #	Description	Brand	Vendor Product #	P/U Price	P/U Desc	Price List Date Range
02-001	ROLLS, HAMBURGER WW	SARAH LEE	87765	18.0000	CASE 6/BAGS	07/01/2016-12/31/2021
03-001	CORN, CANNED YELLOW	LIBBY	98756	12.5400	CASE 6 / #10 CAN	07/01/2016-12/31/2021
1042-001	CHEESE,PAST PROCESS,AMERIC...	Land O Lakes	42334	10.3600	Case 4 cartons	07/01/2016-12/31/2021

9. Enter the **Quantity Ordered**.
10. Repeat steps 7 and 8, for the products you would like to order.
11. If applicable, type a note in the Comment field.
12. If you need to add additional products, remove products, or modify the vendor order, click **Save**.

13. Click **Submit** (if you do not have Approve/Reject Orders privileges) when you are ready to submit the order.

The screenshot shows the 'Vendor Orders > Edit' page. At the top, there are fields for Site (GEORGE WASHINGTON ELEMENTARY), Vendor (Vendor), Order #, Status, Delivery Date (9/30/2016), Saved Date, Submitted Date, and Approved Date. Below this is the 'Products Ordered' section with a search bar and a table. The table has columns for Product #, Description, Brand, Vendor Product #, Purchase Unit Description, Order Qty, Purchase Unit Price, and Total. Three items are listed: 11785-001 (Towels), 1111-001 (Napkins), and 4038-001 (Safety Gloves). The total for the order is 781.00. There is a 'Remove' button, a comment field with the text 'Please notify us of any substitutions in advance.', and buttons for 'Cancel', 'Approve', and 'Save'. A red box highlights a small empty box at the bottom right of the page.

<input type="checkbox"/>	Product #	Description	Brand	Vendor Product #	Purchase Unit Description	Order Qty	Purchase Unit Price	Total
<input type="checkbox"/>	11785-001	GOURD,DISHCLOT...	Towels	345334	12	15	15.00	225.00
<input type="checkbox"/>	1111-001	Napkins	Kleenex	334	case(10)	10	25.00	250.00
<input checked="" type="checkbox"/>	4038-001	Safety Gloves		55858	each	12	25.50	306.00

Order Total 781.00

14. At the confirmation prompt, click **Continue**.

15. If you have specified the Order Export template for the selected vendor and have Approve rights, the following confirmation prompt displays. Click **Yes** to create the export file or **No** to skip the export file creation.

The confirmation prompt is titled 'Confirm' and asks 'Would you like to export this Vendor Order?'. It has two buttons: 'Yes' (green) and 'No' (blue).

16. Upon completion the **Vendor Order added successfully** or the **Vendor Order approved and export successfully** prompt displays.

## Removing a Product from a Vendor Order

To remove a product from a vendor order, select the check box and click **Remove**. You may only remove a product from the vendor order as long as the order has not been approved. If the vendor order is submitted or approved, **Remove** is not visible. The Remove button is not enabled unless a check box has been selected.

Products Ordered

Search  within Product #, Description, Brand, Vendor Product #

<input type="checkbox"/>	Product #	Description	Brand	Vendor Product #	Purchase Unit Description	Order Qty	Purchase Unit Price	Total
<input checked="" type="checkbox"/>	4320-001	Knives		55644332	1	<input type="text" value="2"/>	22.00	44.00
<input type="checkbox"/>	11785-001	GOURD,DISHCLOT...	Towels	345334	12	<input type="text" value="5"/>	15.00	75.00

Comment:

Order Total 119.00

To remove all products from a receiving transaction, select the header check box and click **Remove**.

Products Ordered

Search  within Product #, Description, Brand, Vendor Product #

<input checked="" type="checkbox"/>	Product #	Description	Brand	Vendor Product #	Purchase Unit Description	Order Qty	Purchase Unit Price	Total
<input checked="" type="checkbox"/>	4320-001	Knives		55644332	1	<input type="text" value="2"/>	22.00	44.00
<input checked="" type="checkbox"/>	11785-001	GOURD,DISHCLOT...	Towels	345334	12	<input type="text" value="5"/>	15.00	75.00

Comment:

Order Total 119.00

# ORDERING

## Approving or Rejecting a Vendor Order

You may approve or reject a vendor order that is submitted and awaiting approval.

**Note:** The **Approve** and **Reject** functions are controlled through the security group **Ordering - Vendor Orders, Edit Fields - Approve/Reject Vendor Orders**.

1. From the left-hand navigation bar, click **Ordering**.
2. Click **Vendor Orders**.
3. Select your search criteria.  
**Note:** Select **Submitted** from the Status drop-down menu to display orders that need approval.
4. Click **Search**.
5. Click the appropriate Order # hyperlink.

Order #	Status	Delivery Date	Site	Vendor	Entered...	Approval Date	Approve...	Receiving #	Received Date	Receiving Committed	Requisition #
62	Submitted	04/21/2018	Adams El...	US Foods	Charles					No	

6. Click **Approve** or **Reject**.

Reject Revert Cancel Approve Save

7. At the Approve confirmation prompt click **Continue**, or click **Yes** to reject the vendor order.

**Confirm** ✓  
You are about to approve this Vendor Order.  
Do you wish to continue?  
Continue Cancel

**Warning** !  
Are you sure you want to reject this Vendor Order?  
Yes No

8. Upon completion, the **Vendor Order approved successfully** or **Vendor Order rejected successfully** prompt displays.

# ORDERING

## Reverting a Vendor Order

Instead of rejecting a vendor order, a user may use the Revert button to change a Submitted order's status back to Saved, allowing for changes to be made for a re-submitted vendor order.

1. From the left-hand navigation bar, click **Ordering**.
2. Click **Vendor Orders**.
3. Select your search criteria.  
**Note:** Select **Submitted** from the Status drop-down menu to display orders that need approval.
4. Click **Search**.
5. Click the appropriate Order # hyperlink.

Order #	Status	Delivery Date	Site	Vendor	Entered...	Approval Date	Approve...	Receiving #	Received Date	Receiving Committed	Requisition #
52	Submitted	04/21/2018	Adams El...	US Foods	Charles					No	

6. Click **Revert**.

Reject Revert Cancel Approve Save

7. The Status of the Vendor Order changes from Submitted to Saved, and you may edit the items on the vendor order.

# ORDERING

## Exporting a Vendor Order (Vendor Export)

**Note:** Vendor Export is only available for vendor orders with vendors that have an Order Export Template selected in their vendor settings. To set the Order Export Template, see the **Vendors** section of the **Setup** tab.

After placing a vendor order, if the Vendor Order is Approved (or Submitted depending on the District's System Settings), you have the option to export the order. A file will be generated based on the selected Order Export Template (see the Vendor's settings for more information). This is useful for sending orders to vendors in file formats that they can use immediately instead of having to transpose from paper or PDF copies.

To export a vendor order:

1. From the left-hand navigation bar, click **Ordering**.
2. Click **Vendor Orders**.
3. Select your search criteria.  
**Note:** Select a Status that displays vendor orders that may be exported, such as "Approved".
4. Click **Search**.
5. Click the appropriate Order # hyperlink.

Order #	Status	Delivery Date	Site	Vendor	Entered By	Approval Date	Approved By	Receiving #	Received Date	Receiving Committed	Requisition #
<a href="#">1</a>	Approved	10/11/2016	Adams Ele...	Sysco	manager	10/05/2016	manager	<a href="#">2</a>		No	

6. Click **Export**.

Comment:

Order Total 0.0000

[View Report](#) [Export](#) [Cancel](#) [Save](#)

7. The file will download to your computer in the format specified by the vendor's Order Export Template.



## Warehouse Orders

The Warehouse Orders page allows users to create and manage orders meant for Warehouse sites.

A user must be assigned to the appropriate **Ordering - Warehouse Orders** security group settings to manage warehouse orders. Please refer to the Setup section to provide users the appropriate access to warehouse orders.

Perform the following procedure to search for a warehouse order.

1. From the left-hand navigation bar, click **Ordering**.
2. Click **Warehouse Orders**.
3. Select your search criteria.  
**Note:** The filters can be left blank to display all orders in the search results.
4. Click **Search**. The following fields are displayed:

Column Label	Description
Order #	An ascending numeric hyperlink based on the order number.
Status	The status is system assigned based on the requisition process. There are five statuses. Saved - The order has been entered and saved. You can edit the Delivery Date, add and remove products, update order quantity fields, and the Comment field. Submitted - The order has been submitted, but not yet approved. If you do not have Approve/Reject Order privileges, you can only view the order. Approved - The order has been submitted and approved. If you have Approve/Reject Orders privileges, you can only edit the Delivery Date, Comment field and Shipping Fee. If you do not have Approve/Reject Order privileges, you can only view the order. Received - The assigned site has received the order and the receiving transaction was committed. Rejected - The order has been rejected by the approver. You can only view the order.
Delivery Date	The requested delivery date assigned to the order.
Delivery Site	The site assigned to receive the delivery.
Source Site (Warehouse)	The warehouse site assigned to deliver the order.
Entered By	The name of the user that entered the order.
Approval Date	The date the order was approved.
Approved By	The name of the user that approved the order.
Transfer #	An ascending numeric hyperlink assigned to the transfer transaction.
Transfer Date	The date the order was transferred.
Transfer Committed	<b>Yes</b> displays when the transaction has been committed.
Requisition #	The value represents the requisition number if an order was created through a requisition.

# ORDERING

5. Click the appropriate Order # hyperlink.

**Note:** You may also click on the Requisition # link to be redirected to the respective requisition order in the system.

The screenshot shows the 'Warehouse Orders' page. At the top, there is a breadcrumb trail: Home > Ordering > Warehouse Orders. Below this is a search form with the following fields:

- Order #: [Text Input]
- Delivery Site: [Dropdown Menu]
- Source Site (Warehouse): [Dropdown Menu, currently showing 'District Warehouse']
- Entered By: [Dropdown Menu]
- Approved By: [Dropdown Menu]
- Requisition #: [Text Input]
- Status: [Dropdown Menu]
- Delivery Start Date: [Date Picker]
- Delivery End Date: [Date Picker]
- Approval Start Date: [Date Picker]
- Approval End Date: [Date Picker]

At the bottom right of the form are three buttons: 'Reset' (red), 'Add' (green), and 'Search' (blue).

Below the form is a table with the following columns: Order #, Status, Delivery Date, Delivery S..., Source Site (Warehou..., Entered By, Approval Date, Approved ..., Transfer #, Transfer Date, Transfer Committed, and Requisition #.

Order #	Status	Delivery Date	Delivery S...	Source Site (Warehou...	Entered By	Approval Date	Approved ...	Transfer #	Transfer Date	Transfer Committed	Requisition #
<a href="#">1</a>	Saved	10/01/2018	Central Kitc...	District Wa...	manager					No	
<a href="#">2</a>	Submitted	10/01/2018	Adams Ele...	District Wa...	Charles					No	

## Adding a Warehouse Order

Perform the following procedure to add a warehouse order.

1. From the left-hand navigation bar, click **Ordering**.
2. Click **Warehouse Orders**.
3. Click **Add**.
4. From the Delivery Site drop-down menu, select the appropriate location. This field is required.
5. From the Source Site drop-down menu, select the appropriate warehouse site. This field is required.
6. Select a Delivery Date using the date picker.

The screenshot shows the 'Add Warehouse Order' form with the following fields:

- Delivery Site: [Dropdown Menu, currently showing 'Adams Elementary']
- Source Site (Warehouse): [Dropdown Menu, currently showing 'District Warehouse']
- Order #: [Text Input]
- Requisition #: [Text Input]
- Status: [Text Input]
- Delivery Date: [Date Picker, currently showing '10/1/2018']
- Saved Date: [Text Input]
- Submitted Date: [Text Input]
- Approved Date: [Text Input]

# ORDERING

- When adding products to the warehouse order, you have the ability to search by Product and include various fields, or by Product Group. Click **Search** and then select your preferred search criteria. The default search includes all fields. If you leave the Edit screen, the search resets to the default and all check boxes are selected.

## By Product and fields:

Products Ordered

Search  within Product #, Description, Brand, P/U Desc

By Product

Include fields:

- Product #
- Description
- Brand
- P/U Desc

By Product Group

Product #	Description	Brand	P/U Order Q...	P/U Description	S/U Order Q...	S/U Description	*Purchase Unit Price	Total
-----------	-------------	-------	----------------	-----------------	----------------	-----------------	----------------------	-------

## By Product Group:

Products Ordered

Search  within Product Group Name

Product Group Name

- Dairy Products
- Mosaic Test
- Paper Supplies

Product #	Description	Brand	P/U Order Q...	P/U Description	S/U Order Q...	S/U Description	*Purchase Unit Price	Total
-----------	-------------	-------	----------------	-----------------	----------------	-----------------	----------------------	-------

- Enter a product #, description, brand, or Purchase Unit Description in the Search field, and then click the product to add it to the Warehouse Order.

Products Ordered

Search  within Product #, Description, Brand, P/U Desc

Product #	Description	Brand	P/U Price	P/U Desc	S/U Order Q...	S/U Description	*Purchase Unit Price	Total
02-001	ROLLS, HAMBURGER WW	SARAH LEE	20.0000	CASE 6/BAGS				
03-001	CORN, CANNED YELLOW	LIBBY	20.0000	CASE 6 / #10 CAN				
03-002	CORN, CANNED YELLOW	ABC	15.0000	Case 6/#10				
088-001	Chocolate Milk FF MooMoo Dairy	MooMoo Dairy	10.7500	case 50 Ct				

- Enter the quantity ordered in either the **P/U Order Qty** field or, if available, the **S/U Order Qty** field.
- Repeat steps 8 and 9 for the products you would like to order.

**Note:** The purchase unit price displayed represents the default purchase price.

Products Ordered

Search  within Product #, Description, Brand, P/U Desc

Product #	Description	Brand	P/U Order Q...	P/U Description	S/U Order Q...	S/U Description	*Purchase Unit Price	Total
1082-001	MILK,LOWFAT,1%	Hiland	5	Case 50ct	3	Carton	10.7500	54.3950

# ORDERING

11. If applicable, type a note in the Comment field.
12. Use the Shipping Fee field to charge for the delivery of the products.
13. If you need to add additional products, remove products, or modify the warehouse order, click **Save**.
14. Click **Submit** (if you do not have Approve/Reject Orders privileges) when you are ready to submit the order.

Delivery Site:  Delivery Date:

Source Site (Warehouse):  Saved Date:

Order #: Submitted Date:

Requisition #: Approved Date:

Status:

### Products Ordered

Search Products... within Product #, Description, Brand, P/U Desc

<input type="checkbox"/>	Product #	Description	Brand	P/U Order Q...	P/U Description	S/U Order Q...	S/U Description	*Purchase Unit Price	Total
<input type="checkbox"/>	1082-001	MILK,LOWFAT,1%	Hiland	<input type="text" value="5"/>	Case 50ct	<input type="text" value="3"/>	Carton	10.7500	54.3950
<input type="checkbox"/>	1234-001	banana	dole	<input type="text" value="6"/>	case	<input type="text" value="2"/>	Bunch	15.0000	93.0000
<input type="checkbox"/>	9003-001	APPLES,FRESH	ABC	<input type="text" value="3"/>	Case 113ct	<input type="text" value="12"/>	Each	25.9000	80.4504

*\*The purchase price displayed represents the default purchase price*

Comment:

Sub Total 227.8454

Shipping Fee

Order Total 242.8454

15. At the confirmation prompt, click **Continue**.

Confirm

You are about to submit this Warehouse Order for approval. Do you wish to continue?

## Removing a Product from a Warehouse Order

To remove a product from a warehouse order, select the check box and click **Remove**. You may only remove a product from the warehouse order as long as the order has not been approved. If the warehouse order is submitted or approved, **Remove** is not visible. The Remove button is not enabled unless a check box has been selected.

Products Ordered

Search  within Product #, Description, Brand, P/U Desc

<input type="checkbox"/>	Product #	Description	Brand	P/U Order Q...	P/U Description	S/U Order Q...	S/U Description	*Purchase Unit Price	Total
<input checked="" type="checkbox"/>	03-001	CORN, CANNED ...	LIBBY	4	CASE 6 / #10 C...	1	#10 CAN	20.0000	83.3333
<input type="checkbox"/>	1082-001	MILK,LOWFAT,1%	Hiland	5	Case 50ct	3	Carton	10.7500	54.3950
<input type="checkbox"/>	1234-001	banana	dole	6	case	4	Bunch	15.0000	96.0000
<input type="checkbox"/>	1042-001	CHEESE,PAST P...	Land O Lakes	5	Case 4 cartons	1	Carton (160 slic...	39.5000	207.3750
<input type="checkbox"/>	9003-001	APPLES,FRESH	ABC	2	Case 113ct	12	Each	25.9000	54.5504

\*The purchase price displayed represents the default purchase price

**Remove**      Comment:

Sub Total      495.6537  
 Shipping Fee        
**Order Total**      **495.6537**

To remove all products from a receiving transaction, select the header check box and click **Remove**.

Products Ordered

Search  within Product #, Description, Brand, P/U Desc

<input checked="" type="checkbox"/>	Product #	Description	Brand	P/U Order Q...	P/U Description	S/U Order Q...	S/U Description	*Purchase Unit Price	Total
<input checked="" type="checkbox"/>	03-001	CORN, CANNED ...	LIBBY	4	CASE 6 / #10 C...	1	#10 CAN	20.0000	83.3333
<input checked="" type="checkbox"/>	1082-001	MILK,LOWFAT,1%	Hiland	5	Case 50ct	3	Carton	10.7500	54.3950
<input checked="" type="checkbox"/>	1234-001	banana	dole	6	case	4	Bunch	15.0000	96.0000
<input checked="" type="checkbox"/>	1042-001	CHEESE,PAST P...	Land O Lakes	5	Case 4 cartons	1	Carton (160 slic...	39.5000	207.3750
<input checked="" type="checkbox"/>	9003-001	APPLES,FRESH	ABC	2	Case 113ct	12	Each	25.9000	54.5504

\*The purchase price displayed represents the default purchase price

**Remove**      Comment:

Sub Total      495.6537  
 Shipping Fee        
**Order Total**      **495.6537**

## Approving or Rejecting a Warehouse Order

You may approve or reject a warehouse order that is submitted and awaiting approval. If a Warehouse Order is approved, a Transfer is created from the order and submitted automatically. That transfer may then be approved and shipped, or the warehouse admin user may wait until expected stock arrives to fill the Warehouse Order.

**Note:** The **Approve** and **Reject** functions are controlled through the security group **Ordering - Warehouse Orders, Edit Fields - Approve/Reject Warehouse Orders**.

1. From the left-hand navigation bar, click **Ordering**.
2. Click **Warehouse Orders**.
3. Select your search criteria.  
**Note:** Select **Submitted** from the Status drop-down menu to display orders that need approval.
4. Click **Search**.
5. Click the appropriate Order # hyperlink.

Order #	Status	Delivery Date	Delivery Site	Source Site (Warehouse)	Entered By	Approval Date	Approved By	Transfer #	Transfer Date	Transfer Committed	Requisition #
2	Submitted	10/01/2018	Adams Elem...	District War...	Charles					No	

6. Click **Approve** or **Reject**.

Buttons: **Reject**, **Revert**, **Cancel**, **Approve**, **Save**

7. At the Approve confirmation prompt click **Continue**, or click **Yes** to reject a warehouse order.

**Confirm** (with green checkmark icon):  
You are about to approve this Warehouse Order. Do you wish to continue?  
Buttons: **Continue**, **Cancel**

**Warning** (with yellow warning icon):  
Are you sure you want to reject this Warehouse Order?  
Buttons: **Yes**, **No**

8. Upon completion, the **Warehouse Order approved successfully** or **Warehouse Order rejected successfully** prompt displays.  
If the Warehouse Order was approved, a Transfer is created from the order and submitted automatically. That transfer may then be approved and shipped, or the warehouse admin user may wait until expected stock arrives to fill the Warehouse Order.

# ORDERING

## Reverting a Warehouse Order

Instead of rejecting a warehouse order, you may use the Revert button to change a Submitted order's status back to Saved, allowing for changes to be made for a re-submitted warehouse order.

1. From the left-hand navigation bar, click **Ordering**.
2. Click **Warehouse Orders**.
3. Select your search criteria.  
**Note:** Select **Submitted** from the Status drop-down menu to display orders that need approval.
4. Click **Search**.
5. Click the appropriate Order # hyperlink.

Home > Ordering > Warehouse Orders

Order #:

Delivery Site:

Source Site (Warehouse):

Entered By:

Approved By:

Requisition #:

Status: Submitted

Delivery Start Date:

Delivery End Date:

Approval Start Date:

Approval End Date:

Reset Add Search

Order #	Status	Delivery Date	Delivery Site	Source Site (Warehouse)	Entered By	Approval Date	Approved By	Transfer #	Transfer Date	Transfer Committed	Requisition #
2	Submitted	10/01/2018	Adams Elem...	District War...	Charles					No	

6. Click **Revert**.

Reject Revert Cancel Approve Save

7. The status of the Warehouse Order changes from Submitted to Saved, and you may edit the items on the warehouse order.

## Consolidated Warehouse Vendor Orders

Consolidated Warehouse Vendor Orders allow you to take multiple Warehouse Orders and create one Vendor Order that fulfills all of them. This is good for have a single order that fulfills the needs of multiple sites.

### Creating a Consolidated Warehouse Vendor Order

Perform the following procedure to create a Consolidated Warehouse Vendor Order.

1. From the left-hand navigation bar, click **Ordering**.
2. Click **Consolidated Warehouse Vendor Orders**.
3. Select your search criteria.  
**Note:** The filters can be left blank to display all orders in the search results.
4. Click **Search**. The following fields are displayed:

Column Label	Description
Order #	An ascending numeric hyperlink based on the order number.
Status	The status is system assigned based on the requisition process. There are five statuses. Saved - The order has been entered and saved. You can edit the Delivery Date, add and remove products, update order quantity fields, and the Comment field. Submitted - The order has been submitted, but not yet approved. If you do not have Approve/Reject Order privileges, you can only view the order. Approved - The order has been submitted and approved. If you have Approve/Reject Orders privileges, you can only edit the Delivery Date, Comment field and Shipping Fee. If you do not have Approve/Reject Order privileges, you can only view the order. Received - The assigned site has received the order and the receiving transaction was committed. Rejected - The order has been rejected by the approver. You can only view the order.
Delivery Date	The requested delivery date assigned to the order.
Site	The site assigned to receive the delivery.
Warehouse	The warehouse site assigned to deliver the order.
Entered By	The name of the user that entered the order.
Approval Date	The date the order was approved.
Approved By	The name of the user that approved the order.



# ORDERING

- Use the checkmarks to select which Warehouse Orders you would like to consolidate into a Vendor Order. You may use the top-most checkmark to select all of the orders in the search results.
- Click **Create Vendor Orders**.

Warehouse:

Site:

Site Group:

Entered By:

Approved By:

Status:

Approval Start Date:

Approval End Date:

Delivery Start Date:

Delivery End Date:

Reset
Search

<input type="checkbox"/>	Order #	Status	Delivery Date	Site	Warehouse	Entered By	Approval Date	Approved By
<input checked="" type="checkbox"/>	1	Approved	02/03/2020	Central Kitchen	District Warehouse	manager	01/16/2020	Charles
<input type="checkbox"/>	2	Submitted	10/01/2018	Adams Elementary	District Warehouse	Charles		
<input checked="" type="checkbox"/>	3	Approved	03/02/2020	George Washington Eleme...	District Warehouse	manager	01/16/2020	Charles
<input checked="" type="checkbox"/>	5	Approved	01/31/2020	T Jefferson Elementary	District Warehouse	Deanne	01/16/2020	Charles
<input type="checkbox"/>	8	Approved	10/19/2018	George Washington Eleme...	District Warehouse	Deanne	10/16/2018	Deanne
<input type="checkbox"/>	9	Approved	10/26/2018	George Washington Eleme...	District Warehouse	Beth	10/23/2018	Beth
<input type="checkbox"/>	10	Submitted	10/25/2018	George Washington Eleme...	District Warehouse	Joe		
<input type="checkbox"/>	11	Approved	01/18/2019	Adams Elementary	District Warehouse	Beth	01/14/2019	Beth

Create Vendor Orders

The created vendor order is then available to edit and approve under Vendor Orders. Vendor orders created from consolidated orders are noted as such in the Comment field of the vendor order.

Home > Ordering > Vendor Orders > Edit : Order # 66

Site:

Vendor:

Order #: 66

Requisition #:

Status: Saved

Delivery Date:

Saved Date: 1/16/2020

Submitted Date:

Approved Date:

**Products Ordered**

Search Products... within Product #, Description, Brand, Vendor Product #

<input type="checkbox"/>	Product #	Description	Brand	Vendor Product #	Purchase Unit Description	Order Qty	Purchase Unit Price	Total
<input type="checkbox"/>	1082-001	MILK,LOWFAT,1%	Hiland	33491	Case 50ct	<input type="text" value="6"/>	10.6500	63.9000
<input type="checkbox"/>	9003-001	APPLES,FRESH	ABC	00924	Case 113ct	<input type="text" value="4"/>	25.6600	102.6400
<input type="checkbox"/>	1042-001	CHEESE,PAST PRO...	Land O Lakes	42334	Case 4 cartons	<input type="text" value="7"/>	10.3600	72.5200
<input type="checkbox"/>	23567-001	BEEF,GROUND,85...	Archer	5842	Case (4 Chubs)	<input type="text" value="5"/>	19.9900	99.9500
<input type="checkbox"/>	03-001	CORN, CANNED YE...	LIBBY	98756	CASE 6 / #10 CAN	<input type="text" value="7"/>	12.5400	87.7800

Comment: 

Created on 01/16/2020 by user [redacted] from [redacted] Consolidated Warehouse Vendor Order

**Order Total** 598.5700

Delete
Cancel
Approve
Save

# ORDERING

## Central Kitchen Orders

The Central Kitchen Orders page allows users to create and manage orders meant for Central Kitchen sites.

A user must be assigned to the appropriate **Ordering - Central Kitchen Orders** security group settings to manage central kitchen orders. Please refer to the Setup section to provide users the appropriate access to central kitchen orders.

Perform the following procedure to search for a central kitchen order.

1. From the left-hand navigation bar, click **Ordering**.
2. Click **Central Kitchen Orders**.
3. Select your search criteria.  
**Note:** The filters can be left blank to display all orders in the search results.
4. Click **Search**. The following fields are displayed:

Column Label	Description
Order #	An ascending numeric hyperlink based on the order number.
Status	The status is system assigned based on the requisition process. There are five statuses. Saved - The order has been entered and saved. You can edit the Delivery Date, add and remove products, update order quantity fields, and the Comment field. Submitted - The order has been submitted, but not yet approved. If you do not have Approve/Reject Order privileges, you can only view the order. Approved - The order has been submitted and approved. If you have Approve/Reject Orders privileges, you can only edit the Delivery Date, Comment field and Shipping Fee. If you do not have Approve/Reject Order privileges, you can only view the order. Received - The assigned site has received the order and the receiving transaction was committed. Rejected - The order has been rejected by the approver. You can only view the order.
Delivery Date	The requested delivery date assigned to the order.
Delivery Site	The site assigned to receive the delivery.
Central Kitchen	The central kitchen site assigned to deliver the order.
Entered By	The name of the user that entered the order.
Approval Date	The date the order was approved.
Approved By	The name of the user that approved the order.
Transfer #	An ascending numeric hyperlink assigned to the transfer transaction.
Transfer Date	The date the order was transferred.
Transfer Committed	<b>Yes</b> displays when the transaction has been committed.
Requisition #	The value represents the requisition number if an order was created through a requisition.

# ORDERING

5. Click the appropriate Order # hyperlink.

**Note:** You may also click on the Transfer # link to be redirected to the respective transfer order in the system.

The screenshot shows the 'Central Kitchen Orders' page. At the top, there is a breadcrumb trail: Home > Ordering > Central Kitchen Orders. Below this is a search form with the following fields:

- Order #: [Text Input]
- Delivery Site: [Dropdown Menu]
- Central Kitchen: [Dropdown Menu, currently showing 'Central Kitchen']
- Entered By: [Dropdown Menu]
- Approved By: [Dropdown Menu]
- Requisition #: [Text Input]
- Status: [Dropdown Menu]
- Delivery Start Date: [Date Picker]
- Delivery End Date: [Date Picker]
- Approval Start Date: [Date Picker]
- Approval End Date: [Date Picker]

At the bottom right of the form are three buttons: 'Reset' (red), 'Add' (green), and 'Search' (blue).

Below the form is a table with the following columns: Order #, Status, Delivery Date, Delivery S..., Central Kit..., Entered By, Approval Date, Approved ..., Transfer #, Transfer Date, Transfer Committed, and Requisition... The table contains two rows of data:

Order #	Status	Delivery Date	Delivery S...	Central Kit...	Entered By	Approval Date	Approved ...	Transfer #	Transfer Date	Transfer Committed	Requisition...
1	Saved		Adams Ele...	Central Kit...	Charles					No	
2	Submitted	05/01/2020	T Jefferson ...	Central Kitc...	Charles					No	

## Adding a Central Kitchen Order

Perform the following procedure to add a central kitchen order.

1. From the left-hand navigation bar, click **Ordering**.
2. Click **Central Kitchen Orders**.
3. Click **Add**.
4. From the Delivery Site drop-down menu, select the appropriate location. This field is required.
5. From the Source Site drop-down menu, select the appropriate central kitchen site. This field is required.
6. Select a Delivery Date using the date picker.

The screenshot shows the 'Add' form for a Central Kitchen Order. At the top, there is a breadcrumb trail: Home > Ordering > Central Kitchen Orders. The form contains the following fields:

- Delivery Site: [Dropdown Menu, currently showing 'Adams Elementary']
- Source Site (Central Kitchen): [Dropdown Menu, currently showing 'Central Kitchen']
- Order #: [Text Input]
- Requisition #: [Text Input]
- Status: [Text Input]
- Delivery Date: [Date Picker, currently showing '7/23/2020']
- Saved Date: [Text Input]
- Submitted Date: [Text Input]
- Approved Date: [Text Input]

# ORDERING

- When adding products to the central kitchen order, you have the ability to search by Product and include various fields, or by Product Group. Click **Search** and then select your preferred search criteria. The default search includes all fields. If you leave the Edit screen, the search resets to the default and all check boxes are selected.

## By Product and fields:

Products Ordered

Search  within Product #, Description, Brand, P/U Desc

By Product

Include fields:

- Product #
- Description
- Brand
- P/U Desc

By Product Group

	Description	Brand	P/U Order Q...	P/U Description	S/U Order Q...	S/U Description	*Purchase Unit Price	Total

## By Product Group:

Products Ordered

Search  within Product Group Name

Product Group Name

- Dairy Products
- Mosaic Test
- Paper Supplies

	S/U Order Q...	S/U Description	*Purchase Unit Price	Total

- Enter a product #, description, brand, or Purchase Unit Description in the Search field, and then click the product to add it to the Central Kitchen Order.

Products Ordered

Search  within Product #, Description, Brand, P/U Desc

Product #	Description	Brand	P/U Price	P/U Desc	S/U Order Q...	S/U Description	*Purchase Unit Price	Total
02-001	ROLLS, HAMBURGER WW	SARAH LEE	20.0000	CASE 6/BAGS				
03-001	CORN, CANNED YELLOW	LIBBY	20.0000	CASE 6 / #10 CAN				
03-002	CORN, CANNED YELLOW	ABC	15.0000	Case 6/#10				
088-001	Chocolate Milk FF MooMoo Dairy	MooMoo Dairy	10.7500	case 50 Ct				

- Enter the quantity ordered in either the **P/U Order Qty** field or, if available, the **S/U Order Qty** field.

- Repeat steps 8 and 9 for the products you would like to order.

**Note:** The purchase unit price displayed represents the default purchase price.

Products Ordered

Search  within Product #, Description, Brand, P/U Desc

Product #	Description	Brand	P/U Order Q...	P/U Description	S/U Order Q...	S/U Description	*Purchase Unit Price	Total
1082-001	MILK,LOWFAT,1%	Hiland	5	Case 50ct	3	Carton	10.7500	54.3950

# ORDERING

11. If applicable, type a note in the Comment field.
12. Use the Shipping Fee field to charge for the delivery of the products.
13. If you need to add additional products, remove products, or modify the central kitchen order, click **Save**.
14. Click **Submit** (if you do not have Approve/Reject Orders privileges) when you are ready to submit the order.

### Products Ordered

Search  within Product #, Description, Brand, P/U Desc

<input type="checkbox"/>	Product #	Description	Brand	P/U Order Q...	P/U Description	S/U Order Q...	S/U Description	*Purchase Unit Price	Total
<input type="checkbox"/>	1082-001	MILK,LOWFAT,1%	Hiland	<input type="text" value="5"/>	Case 50ct	<input type="text" value="3"/>	Carton	10.7500	54.3950
<input type="checkbox"/>	1234-001	banana	dole	<input type="text" value="6"/>	case	<input type="text" value="2"/>	Bunch	15.0000	93.0000
<input type="checkbox"/>	9003-001	APPLES,FRESH	ABC	<input type="text" value="3"/>	Case 113ct	<input type="text" value="12"/>	Each	25.9000	80.4504

*\*The purchase price displayed represents the default purchase price*

Comment:

Sub Total 227.8454  
Shipping Fee   
Order Total 242.8454

15. At the confirmation prompt, click **Continue**.

### Confirm

You are about to submit this Central Kitchen Order for approval. Do you wish to continue?

## Removing a Product from a Central Kitchen Order

To remove a product from a central kitchen order, select the check box and click **Remove**. You may only remove a product from the central kitchen order as long as the order has not been approved. If the central kitchen order is submitted or approved, **Remove** is not visible. The Remove button is not enabled unless a check box has been selected.

Products Ordered

Search  within Product #, Description, Brand, P/U Desc

<input type="checkbox"/>	Product #	Description	Brand	P/U Order Q...	P/U Description	S/U Order Q...	S/U Description	*Purchase Unit Price	Total
<input checked="" type="checkbox"/>	03-001	CORN, CANNED ...	LIBBY	4	CASE 6 / #10 C...	1	#10 CAN	20.0000	83.3333
<input type="checkbox"/>	1082-001	MILK,LOWFAT,1%	Hiland	5	Case 50ct	3	Carton	10.7500	54.3950
<input type="checkbox"/>	1234-001	banana	dole	6	case	4	Bunch	15.0000	96.0000
<input type="checkbox"/>	1042-001	CHEESE,PAST P...	Land O Lakes	5	Case 4 cartons	1	Carton (160 slic...	39.5000	207.3750
<input type="checkbox"/>	9003-001	APPLES,FRESH	ABC	2	Case 113ct	12	Each	25.9000	54.5504

\*The purchase price displayed represents the default purchase price

**Remove**      Comment:

Sub Total      495.6537  
Shipping Fee        
**Order Total      495.6537**

To remove all products, select the header check box and click **Remove**.

Products Ordered

Search  within Product #, Description, Brand, P/U Desc

<input checked="" type="checkbox"/>	Product #	Description	Brand	P/U Order Q...	P/U Description	S/U Order Q...	S/U Description	*Purchase Unit Price	Total
<input checked="" type="checkbox"/>	03-001	CORN, CANNED ...	LIBBY	4	CASE 6 / #10 C...	1	#10 CAN	20.0000	83.3333
<input checked="" type="checkbox"/>	1082-001	MILK,LOWFAT,1%	Hiland	5	Case 50ct	3	Carton	10.7500	54.3950
<input checked="" type="checkbox"/>	1234-001	banana	dole	6	case	4	Bunch	15.0000	96.0000
<input checked="" type="checkbox"/>	1042-001	CHEESE,PAST P...	Land O Lakes	5	Case 4 cartons	1	Carton (160 slic...	39.5000	207.3750
<input checked="" type="checkbox"/>	9003-001	APPLES,FRESH	ABC	2	Case 113ct	12	Each	25.9000	54.5504

\*The purchase price displayed represents the default purchase price

**Remove**      Comment:

Sub Total      495.6537  
Shipping Fee        
**Order Total      495.6537**

# ORDERING

## Approving or Rejecting a Central Kitchen Order

You may approve or reject a central kitchen order that is submitted and awaiting approval. If a Central Kitchen Order is approved, a Transfer is created from the order and submitted automatically. That transfer may then be approved and shipped, or the central kitchen admin user may wait until expected stock arrives to fill the Central Kitchen Order.

**Note:** The **Approve** and **Reject** functions are controlled through the security group **Ordering - Central Kitchen Orders, Edit Fields - Approve/Reject Central Kitchen Orders**.

1. From the left-hand navigation bar, click **Ordering**.
2. Click **Central Kitchen Orders**.
3. Select your search criteria.  
**Note:** Select **Submitted** from the Status drop-down menu to display orders that need approval.
4. Click **Search**.
5. Click the appropriate Order # hyperlink.

Order #	Status	Delivery Date	Delivery Site	Central Kitchen	Entered By	Approval Date	Approved By	Transfer #	Transfer Date	Transfer Committed	Requisition #
2	Submitted	05/01/2020	T Jefferson...	Central Kit...	Charles					No	

6. Click **Approve** or **Reject**.

7. At the Approve confirmation prompt click **Continue**, or click **Yes** to reject a central kitchen order.

8. Upon completion, the **Central Kitchen Order approved successfully** or **Central Kitchen Order rejected successfully** prompt displays.  
If the Central Kitchen Order was approved, a Transfer is created from the order and submitted automatically. That transfer may then be approved and shipped, or the central kitchen admin user may wait until expected stock arrives to fill the Central Kitchen Order.



## Reverting a Central Kitchen Order

Instead of rejecting a central kitchen order, you may use the Revert button to change a Submitted order's status back to Saved, allowing for changes to be made for a re-submitted central kitchen order.

1. From the left-hand navigation bar, click **Ordering**.
2. Click **Central Kitchen Orders**.
3. Select your search criteria.  
**Note:** Select **Submitted** from the Status drop-down menu to display orders that need approval.
4. Click **Search**.
5. Click the appropriate Order # hyperlink.

Home > Ordering > Central Kitchen Orders

Order #:  Status: Submitted

Delivery Site:  Delivery Start Date:

Central Kitchen:  Delivery End Date:

Entered By:  Approval Start Date:

Approved By:  Approval End Date:

Requisition #:

Reset Add Search

Order #	Status	Delivery Date	Delivery ...	Central Ki...	Entered By	Approval Date	Approved...	Transfer #	Transfer Date	Transfer Committed	Requisition...
2	Submitted	05/01/2020	T Jefferson...	Central Kit...	Charles					No	

6. Click **Revert**.

Reject Revert Cancel Approve Save

7. The status of the Central Kitchen Order changes from Submitted to Saved, and you may edit the items on the central kitchen order.

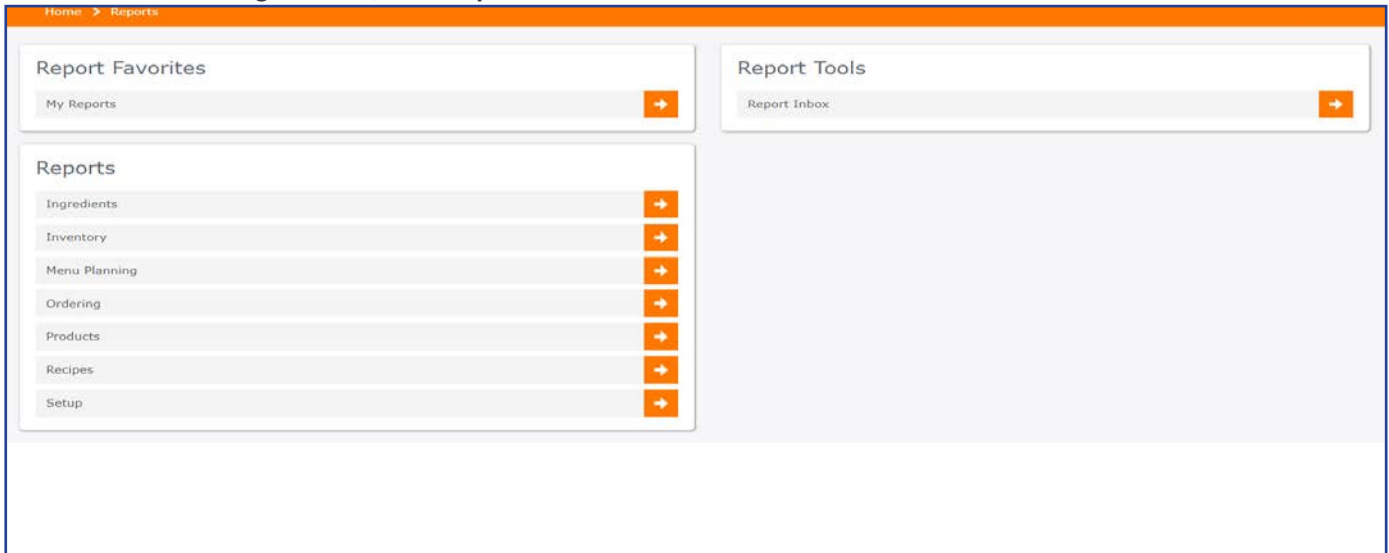


# REPORTS

## Reports Overview

Various reports are available for printing. Perform the following procedure to access reports.

From the left-hand navigation bar, click **Reports**.



## Report Favorites

Report Favorites can be used to create a customized list of reports that are frequently used and provide an easy way to access them in one location.

## My Reports

To add a report to the My Reports page, click the **Favorites** (star) icon. The Favorites icon fills in black and the report is added to the My Reports page.



To remove a report from the My Reports page, click the filled Favorites icon. The icon changes to white, and the report is removed from the My Reports page.



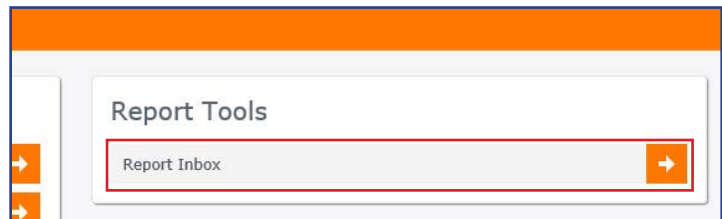
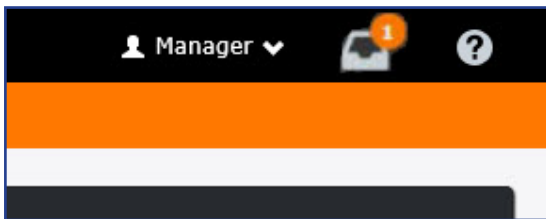
## Report Tools

### Report Inbox

When running a very large report, it can take some time before Mosaic can generate it. If a report does not generate immediately, you will see a message on the page informing you that the report is currently waiting. Even if you close the tab, the report continues to queue and will be available in the Report Inbox once completed.



Access the Report Inbox by either clicking the icon in the upper right, which indicates the number of new reports or through the **Report Inbox** link on the Reports Tab.



### Report Inbox Tab

On the Report Inbox tab, click the Report Name to view a report in the Report Viewer. Clicking the report in the grid and then hovering your cursor over the report image will allow you to navigate, save, and print the selected report.

Report Inbox
Scheduled Reports

Report Name	Status	Actual Runtime
Product List	Complete	Jul 18 - 6:11 PM
Daily Production Report	Complete	Jul 18 - 4:45 PM

Read messages will be removed after 24 hours.  
Unread messages will be removed after 5 days.

Delete Selected Report

**Product List**

Adams Elementary

Report Type : Summary      Active : Yes

Order By : Description

Heartland School Solutions

Product #	Description	Brand	Product Category	Usage Category	Storage Category	Quantity per Purchase Unit	Active	Needs Attention
50356-001	APPLES, SLICED, CND, WATER PACKED	Del Monte	Fruits, Vegetables, Cnd	Purchased Food	Stockroom	6 #10 Can per Case 6#10	Yes	No
9003-001	APPLES,FRESH	ABC	Fruits, Vegetables, Fresh	Purchased Food	Stockroom	113 Each per Case 113c	Yes	No
9020-001	APPLESAUCE,CND,SWT ND,NO,SALT	Libby's	Fruits, Vegetables, Cnd	Purchased Food	Stockroom	6 #10 Can per Case 6#10 cans	Yes	No
123456790-001	APRICOTS,CND,LT SYRUP PK,WBKN,SOLALQUIDS	Libby's	Fruit, Canned			6 #10 CAN per Case 6#10	Yes	No
1234-001	banana	dole	Fruits, Vegetables, Fresh			10 Bunch per case	Yes	No
902432-001	BEANS,SNAP,GREEN,CND	Harvest	Beans, Canned	Purchased Food	Stockroom	6 #10 Can per Case 6#10	Yes	No
601478-001	BEEF FLAMEBROIL PATTY	Advance Food	Meats, Frzn	Purchased Food	Freezer	5 Sleeve (27ct) per Case (135ct)	Yes	No
123456794-001	BEEF FLAMEBROIL PATTY # 155-325 ADVANCE FOOD		Meats, Frozen	Purchased Food	Freezer	135 Patty per Case (135ct)	Yes	No
123456791-001	BEEF PATTY FULLY COOKED		Beans, Frozen			30 add'l per Case 6#10	Yes	No
23567-001	BEEF,GROUND,85% LN MEAT / 15% FAT,RAW	Archer	Meats, Frzn	Purchased Food	Freezer	4 Chub (10#) per Case (4 Chub#)	Yes	No
18036-001	BREAD,MIXED-GRAIN	XYZ	Breads and Grains	Purchased Food	Stockroom	24 Slice per Loaf (24ct)	Yes	No
18967-001	BREAD,WHEAT	XYZ	Breads and Grains	Purchased Food	Stockroom	24 Slice per Loaf (24ct)	Yes	No
18069-001	BREAD,WHITE	XYZ	Breads and Grains	Purchased Food	Stockroom	24 Slice per Loaf (24ct)	Yes	No

Click **Delete Selected Report** to delete the report you have selected.

**Note:** Unread reports will remain in the Inbox for five days.  
Read reports are deleted from the Inbox daily.

Refer to Heartland Support Central to view our article library at [help.heartlandschoolsolutions.com](http://help.heartlandschoolsolutions.com)

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# REPORTS

## Scheduled Reports Tab

On the Scheduled Reports tab, reports that are set to run on a schedule appear in a list. Use the column headers to organize the list by the selected header. You may delete a schedule by clicking it and then clicking **Delete Selected Schedule**. This will remove the schedule and stop any more reports from running according to the schedule. However, any reports that have already run and are still on the Report Inbox tab will not be deleted, and may be viewed and downloaded as normal.

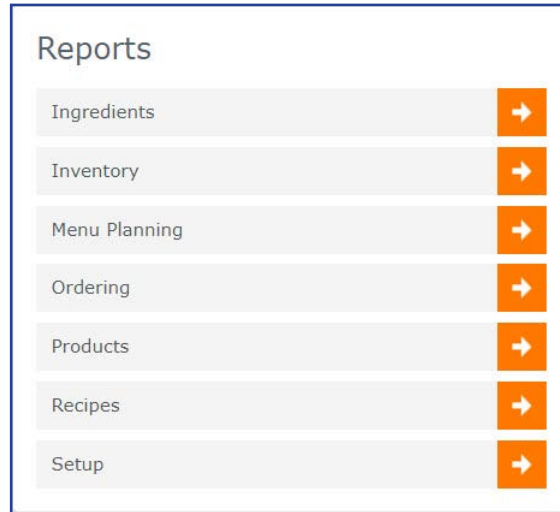
Report Name ^	Schedule	Last Run	Next Run
Daily Production Report	every weekday for 2 times	Jul 18 18 - 4:45 PM	Jul 19 18 - 4:45 PM
Daily Production Report	every week on Monday, Friday until June 30, 2019		Jul 19 18 - 12:00 AM

Delete Selected Schedule

# REPORTS

## Reports

Reports are grouped by category. All available reports may not apply to your Districts needs.



From the report category list, you have three options.

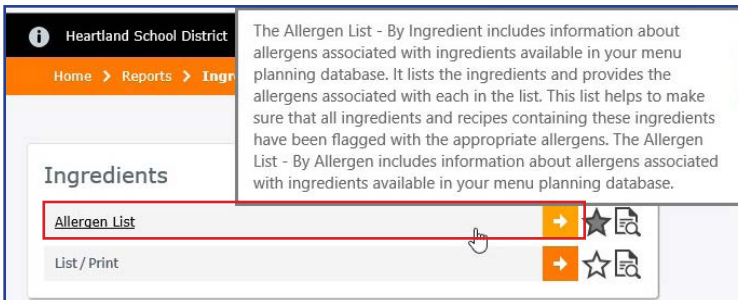
1. Select a report - Select the report by clicking on the name of the report or arrow.  
The following table displays which report categories apply to Ordering & Inventory tasks and Menu Planning tasks.

**Note:** You may click on the report category name in the table to be redirected to that section of the manual.

Ordering & Inventory	Menu Planning
<a href="#">Inventory</a>	<a href="#">Ingredients</a>
<a href="#">Ordering</a>	<a href="#">Inventory</a>
<a href="#">Products</a>	<a href="#">Menu Planning</a>
<a href="#">Setup</a>	<a href="#">Recipes</a>
	<a href="#">Setup</a>

### Report Description

Within each report category, hover your mouse cursor over a report's name to display a description of the report.



2. Add the report to "My Reports" - Add a report to your "My Reports" list by clicking the **Favorites** (star) icon. Proceed to the **My Reports** topic for additional details.

- Review a sample report to ensure that you are selecting the appropriate report. Proceed to the **Report Assistance** topic for details.

### Report Preview

Click the **Report Preview** (magnifying glass) icon to open a sample report.



Click the **X** in the upper right corner, or anywhere outside the report image, to close the sample report.

Home > Reports > Ingredients

**Ingredients**

Allergen List

List / Print

**MOSAIC**  
Allergen List - By Ingredient

Ingredient #	Ingredient Description	Allergen(s)
900057	Almond Extract	
12061	ALMONDS	TreeNut
50041	Apple Crisp	
9400	APPLE JUC,CND OR BTLD,UNSWTND,W/ VIT C	
50356	APPLES, CANNED, UNSWEETENED, SLICED, IN WATER	
799963	APPLES, FRESH, GRANNY SMITH, WITH SKIN	
900037	APPLES,CND,H2O PK,SLCD,DRN	
901667	APPLES,CND,WATER PCK,SLCD	
9003	APPLES,RAW,WITH SKIN	
799979	APPLES,RAW,WITHOUT SKIN	
9020	APPLESAUCE,CND,SWTND,WO/SALT	
902433	APPLESAUCE,CND,UNSWTND,W/ VIT C	
799900	APPLESAUCE,CND,UNSWTND,WO/ VIT C	
900042	APPLESAUCE,CND,UNSWTND,WO/ VIT C	
902441	APPLESAUCE,CND,UNSWTND, Indiv Pkg	
9026	APRICOTS,CND,LT SYRUP PK,W/SKN,SOL&LIQUIDS	
9021	APRICOTS,RAW	
799980	AVOCADOS,RAW,ALL COMM VAR	
902445	BACON,PRE-SLICED,REDUCED/LOW NA,UNPREP	
16005	BAGELS,CINNAMON-RAISIN	
9040	BANANAS,RAW	
20005	BARLEY,PEARLED,RAW	
799961	BEANS, CANNED, BLACK (TURTLE), LOW SODIUM	
799960	BEANS, CANNED, GARBANZO (CHICKPEAS), LOW-SODI	
799959	BEANS, CANNED, GREAT NORTHERN, LOW-SODIUM	
799958	BEANS, CANNED, KIDNEY, LOW-SODIUM	
799957	BEANS, CANNED, PINTO, WHOLE, LOW-SODIUM	
799952	BEANS, NAVY OR PEA, MATURE SEEDS, COOKED, WIT	
16006	BEANS,BKD,CND,PLN OR VEGETARIAN	
799925	BEANS,PINTO,MATURE,CND,DRND	
11052	BEANS,SNAP,GREEN,RAW	

- Set the fields to the applicable search criteria.
- Click **View** at the bottom to open your report.

## Scheduling Reports

You may run certain reports automatically according to a set schedule. This is useful for having records on hand at regular intervals and for specific future dates. To set a report schedule, perform the following steps:

1. From the left-hand navigation menu, click **Reports**.
2. Select the report you would like to schedule, such as Menu Planning > Production Records.
3. Set the report filters to generate the kind of report you would like to have scheduled to run. You may want to click **View** to make sure that the report is accurate to what you want generated by the schedule.
4. Click the **calendar icon**.

Home > Reports > Menu Planning > Menu Planning Production Records

### Production Records

Format Name:

Menu Name: (4 max)

Production Sites:

Start Date:

End Date:

Use Production Specification:

Combine Menu Items:

Display Type:

# REPORTS

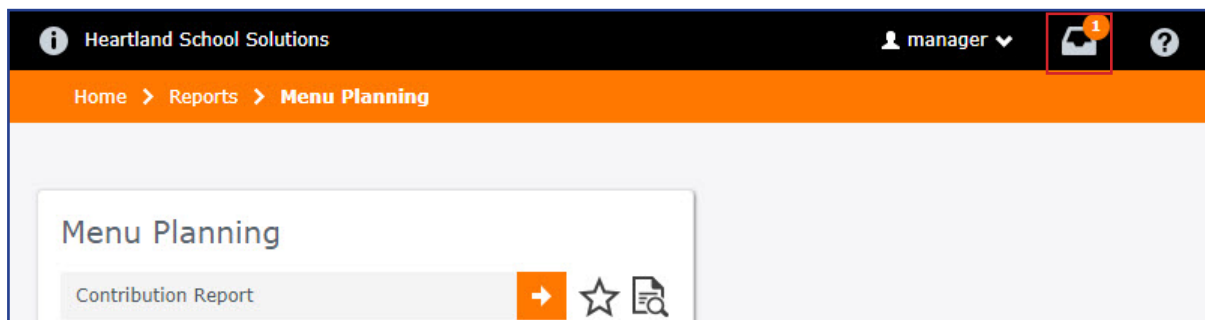
5. Set the Start Time. This will correspond to the district's time zone.
6. Set the Recurrence Pattern. This can be Daily, Weekly, or Monthly, and it can be on specific days.
7. Set the Range of Recurrence. This includes a Start Date (defaults to tomorrow's date) and either no end date, an end after a certain number of reports are run, or an end date.
8. After setting the schedule, click **Schedule Report**.

The screenshot shows a 'Schedule Report' configuration form with three main sections:

- Start:** A 'Start Time' field set to '12:00 AM' with a dropdown arrow.
- Recurrence Pattern:** Radio buttons for 'Daily', 'Weekly', and 'Monthly'. Under 'Weekly', 'Recur every 1 week(s) on:' is shown. Days are listed with checkboxes: Sunday (unchecked), Monday (checked), Tuesday (unchecked), Wednesday (unchecked), Thursday (unchecked), Friday (checked), and Saturday (unchecked).
- Range of Recurrence:** Radio buttons for 'No End Date', 'End after: 10 occurrences', and 'End by: 6/30/2019'. A 'Start' date field is set to '7/17/2018'.

A 'Schedule Report' button with a calendar icon is located at the top right of the form.

After setting a schedule, the report will run automatically at the scheduled time on the scheduled dates. The Date Range for each of the reports is set to the day that it is run. For example, if the report is set to run on 8/16/2018, the Start Date and End Date of the report will both be set to 8/16/2018. These reports will appear in the Report Inbox, and the schedules themselves may be viewed and deleted on the [Scheduled Reports tab](#).



## Ingredients

Click on the report name in the table to be redirected to the specific report in the manual.

Allergen List	List/Print
<a href="#">Allergens List - By Ingredient</a>	<a href="#">Complete Detail Ingredient List</a>
<a href="#">Allergen List - By Allergen</a>	<a href="#">Summary with Nutrient Data Ingredient List</a>
	<a href="#">Summary with Source/Manufacturer Ingredient List</a>

## Allergens List

The Allergen List report is available in multiple report formats: By Ingredients and By Allergen. This list helps to ensure all ingredients and recipes containing these ingredients have been flagged with the appropriate allergens. You can organize the list either by the district's default method, alphabetically, or numerically. You have the choice of listing active ingredients individually, by ingredient number, by classification ID, or by source. This list can also be generated for inactive ingredients.

### Allergens List - By Ingredient

The Allergen List - By Ingredient includes information about allergens associated with ingredients available in your menu planning database.

MOSAIC		
Allergen List - By Ingredient		
Ingredient #	Ingredient Description	Allergen(s)
990356	100% Whole Wheat Bagel 2	Gluten
900006	ALFALFA SEEDS,SPROUTED,RAW	
900057	Almond Extract	Nuts
900117	ANGELFISH,RAW	
900119	APPL CIDER	
900120	APPL CIDER,SPARKLING	
799963	APPLES, FRESH, GRANNY SMITH, WITH SKIN	
799907	APPLES,CND,H2O PK,SLCD,DRN	
900131	APPLES,CND,H2O PK,SLCD,DRN	
900132	APPLES,CND,SWTND,SLICED,DRND,HTD	

### Allergen List - By Allergen

The Allergen List - By Allergen includes information about allergens associated with ingredients available in your menu planning database.

MOSAIC	
Allergen List - By Allergen	
<b>Gluten - This ingredient contains gluten, which may be hazardous to those with a gluten sensitivity.</b>	
Ingredient #	Ingredient Description
990356	100% Whole Wheat Bagel 2
900328	CEREAL RTE,FROSTED MINI-WHEATS,ALL FLAV
<b>Milk - This ingredient contains milk, which may be hazardous to those with a lactose intolerance.</b>	
Ingredient #	Ingredient Description
902380	CAMPBELL,CAMPBELL'S RED & WHITE,CHEDDAR CHS S
<b>Nuts - This product contains tree nuts, which can be hazardous to those with a nut allergy.</b>	
Ingredient #	Ingredient Description
900057	Almond Extract
<b>Soy - This product contains soy, which may be hazardous to those with a soy allergy.</b>	
Ingredient #	Ingredient Description
900272	BURGER,VEG,W/SOY PROTEIN,"FOOD CLUB NEW CHOIC



## Ingredient List/Print

The Ingredient List/Print report is available in multiple report formats: Complete Detail, Summary with Nutrient Data, and Summary with Source/Manufacturer. You have the choice of listing active ingredients individually, by ingredient number, by classification ID, or by source. This list can also be generated for inactive ingredients.

### Complete Detail Ingredient List

The Complete Detail Ingredient List includes all details about the listed ingredients.

**12062 - ALMONDS, BLANCHED**

<p>NUTS - Nuts and seeds</p> <p>Source: USDA</p> <p>Manufacturer:</p> <p>Product No.:</p> <p>Nutrients: Per 100.000 Gram</p>	<p>Measurements</p> <p>CUP, whole kernels..... 145.000 gram</p> <p>TBSP..... 9.100 gram</p> <p>OZ..... 28.350 gram</p> <p>qt, whole kernels..... 580.000 gram</p> <p>qt..... 582.400 gram</p> <p>gram..... 1.000 gram</p> <p>lb..... 453.600 gram</p> <p>gal..... 2329.600 gram</p> <p>cup..... 145.600 gram</p> <p>tsp, whole kernels..... 3.021 gram</p> <p>gal, whole kernels..... 2320.000 gram</p> <p>pint..... 291.200 gram</p> <p>pint, whole kernels..... 290.000 gram</p> <p>tblsp, whole kernels..... 9.063 gram</p> <p>tsp..... 3.033 gram</p>
--	---

Calories <sup>1</sup>	590.000	kcal	Cholesterol	0.000	mg	Sugars	4.630	g	Calcium	236.000	mg
Total Fat	52.5200	g	Sodium <sup>1</sup>	19.000	mg	Protein	21.400	g	Iron	3.280	mg
Sat. Fat <sup>1</sup>	3.9500	g	Carbohydrate	18.6700	g	Vitamin A	7.000	IU	Water	4.510	g
Trans. Fat <sup>2</sup>	*N/A*	g	Dietary Fiber	9.900	g	Vitamin C	0.000	mg	Ash	2.910	g

(\*N/A\* - Denotes missing nutrient values)(<sup>1</sup>- Denotes required nutrient values.)(<sup>2</sup>- Trans Fat value is provided for informational purposes only, not for monitoring purposes.)

### Summary with Nutrient Data Ingredient List

The Summary with Nutrient Data Ingredient List includes the ingredient name and nutrient value per 100 grams.

Summary Ingredient List														Heartland School Solutions		
Search By:		Default								Order By:		Description				
Active:		Yes								Report Type:		Nutrient Base Weight				
No.	Description [Base Weight]	Calories <sup>1</sup> (kcal)	Total Fat (g)	Sat. Fat <sup>1</sup> (g)	Trans Fat <sup>2</sup> (g)	Chol (mg)	Sodium <sup>1</sup> (mg)	Carbs (g)	Fiber (g)	Sugars (g)	Protein (g)	Vitamin A (IU)	Vitamin C (mg)	Calcium (mg)	Iron (mg)	
120325	100% Vegetable Juice [100 g]	17.960	0.0000	0.0000	0.0000	0.000	269.460	4.1900	0.600	*N/A*	0.600	748.500	28.740	11.980	0.220	
120326	100% Vegetable Juice [100 g]	19.340	0.0000	0.0000	0.0000	0.000	254.140	3.8700	0.830	*N/A*	0.550	828.730	28.180	11.050	0.200	
120327	100% Vegetable Juice [100 g]	19.340	0.0000	0.0000	0.0000	0.000	254.140	3.8700	0.830	*N/A*	0.550	828.730	28.180	11.050	0.200	
120328	100% Vegetable Juice [100 g]	20.750	0.0000	0.0000	0.0000	0.000	265.560	4.1500	0.830	*N/A*	0.830	829.880	37.340	16.600	0.300	
120126	100% WG Whole Wheat Bagel, 3.0 oz, 6 pack [100 g]	270.590	2.3500	0.0000	0.0000	0.000	470.590	55.2900	8.240	*N/A*	10.590	0.000	1.660	207.610	2.490	
120123	100% Whole Wheat Bagel, 2.5 oz, 1W [100 g]	281.690	2.1100	0.0000	0.0000	0.000	478.870	57.7500	8.450	*N/A*	11.270	0.000	2.380	198.380	3.580	
120120	100% Whole Wheat Bagel, 3.0 oz, 1W [100 g]	258.820	2.3500	0.0000	0.0000	0.000	458.820	54.1200	8.240	*N/A*	10.590	0.000	1.660	207.610	2.490	
120454	24/10 Tomato Soup [100 g]	72.000	0.0000	0.0000	0.0000	0.000	152.000	16.0000	3.200	*N/A*	1.600	803.200	72.100	12.400	0.860	
120455	24/10 Vegetable Soup [100 g]	56.000	0.8000	0.0000	0.0000	0.000	152.000	11.2000	0.800	*N/A*	1.600	650.000	0.500	4.400	0.700	
120456	24/300 Applesauce [100 g]	44.440	0.0000	0.0000	0.0000	0.000	0.000	11.8500	1.480	*N/A*	0.000	36.100	3.800	4.900	0.070	
120436	24/300 Apricot Halves [100 g]	49.180	0.0000	0.0000	0.0000	0.000	16.390	13.1100	0.000	*N/A*	0.000	1348.100	0.500	7.670	0.250	
120445	24/300 Carrots [100 g]	25.000	0.0000	0.0000	0.0000	0.000	116.670	5.0000	1.670	*N/A*	0.000	6250.000	0.740	13.930	0.000	
120451	24/300 Hominy [100 g]	72.000	0.8000	0.0000	0.0000	0.000	112.000	14.4000	2.400	*N/A*	1.600	0.400	0.800	5.000	0.460	
120438	24/300 Mixed Fruit [100 g]	47.620	0.0000	0.0000	0.0000	0.000	3.970	11.9000	0.790	*N/A*	0.000	177.300	1.350	3.590	0.000	

(\*N/A\* - Denotes missing nutrient values)(<sup>1</sup>- Denotes required nutrient values.)(<sup>2</sup>- Trans Fat value is provided for informational purposes only, not for monitoring purposes.)

## Summary with Source/Manufacturer Ingredient List

The Summary with Source Manufacturer Ingredient List includes the ingredient name, number, class, product number, manufacturer, and source.

MOSAIC					
Source Information Ingredient List					
No.	Description	Class	Product No.	Manufacturer	Source
900057	Almond Extract	MISC	34451	ACH Food Company -Durkee	LOCAL
12061	ALMONDS	NUTS	76575	ABC Co	USDA
50041	Apple Crisp	DESSERT			USDA
9400	APPLE JUC,CND OR BTLD,UNSWTND,W/ VIT C	DRINK			USDA
50356	APPLES, CANNED, UNSWEETENED, SLICED, IN WATER	FRUIT	Sysco H-1234567	H-1234567	USDA
799963	APPLES, FRESH, GRANNY SMITH, WITH SKIN	FRUIT			LOCAL
900037	APPLES,CND,H2O PK,SLCD,DRN	FRUIT	1256	Libby's	LOCAL
901667	APPLES,CND,WATER PACK,SLCD	LC-FR			LOCAL
9003	APPLES,RAW,WITH SKIN	FRUIT	98674452		USDA
799979	APPLES,RAW,WITHOUT SKIN	FRUIT			LOCAL
9020	APPLESAUCE,CND,SWTND,WO/SALT	FRUIT			USDA
902433	APPLESAUCE,CND,UNSWTND,W/ VIT C	FRUIT			LOCAL
799900	APPLESAUCE,CND,UNSWTND,WO/ VIT C	FRUIT			LOCAL
900042	APPLESAUCE,CND,UNSWTND,WO/ VIT C	FRUIT			LOCAL
902441	APPLESAUCE,CND,UNSWTND: Indiv Pkg	FRUIT			LOCAL
9026	APRICOTS,CND,LT SYRUP PK,WISKN,SOL&LIQUIDS	FRUIT	1234567	Libby's- (ABC Co.)	USDA
9021	APRICOTS,RAW	FRUIT			USDA
799980	AVOCADOS,RAW,ALL COMM VAR	FRUIT			LOCAL
902445	BACON,PRE-SLICED,REDUCED/LOW NA,UNPREP	PORK			LOCAL
18005	BAGELS,CINNAMON-RAISIN	GRAIN			USDA
9040	BANANAS,RAW	FRUIT			USDA

# REPORTS

## Inventory

Click on the report name in the table to be redirected to the specific report in the manual.

<a href="#">Inventory on Hand</a>	<a href="#">Inventory Transactions Report</a>
<a href="#">Inventory on Hand - Detailed</a>	<a href="#">Inventory Transfer Report</a>
<a href="#">Inventory on Hand - Summary</a>	<a href="#">Inventory Usage Report</a>
<a href="#">Inventory on Hand - Category Breakdown</a>	<a href="#">Invoice Reconciliation Report</a>
	<a href="#">Warehouse/Central Kitchen Item Availability Report</a>
Additional Inventory Reports	
<a href="#">Inventory Value Report</a>	<a href="#">Inventory Worksheets</a>

## Inventory on Hand

The Inventory on Hand report is available in multiple report formats: Detailed, Summary, and Category Breakdown. There are several filter options: Site, Site Group, Product, Usage, Storage Categories, Product Number or Descriptions, Report Type, Receive Start and End dates, and Order By.

### Inventory on Hand - Detailed

The **Inventory on Hand - Detailed report** provides a list of products that were received within the specified date range with current on hand inventory quantities and costs.

Inventory on Hand														Heartland School Solutions
All Sites													All Dates	
Report Type:		Detailed			Order By:			Receive Date						
<b>Adams Elementary - 5</b>														
Product Number	Description	Received Date	Vendor	Brand	Product Category	Usage Category	Storage Category	Purch Unit Qty	Unit	Purch Unit Cost	Stock Unit Qty	Unit	Stock Unit Cost	Extended Cost
23567-001	BEEF.GROUND.85% LN MEAT / 15% FAT.RAW	10/11/16	Sysco	Archer	MEATFRZ	PURCH	FRZ	3	Case (4 Chubs)	\$59.9700	0	Chub (10#)	\$0.0000	\$59.9700
18036-001	BREAD.MIXED-GRAIN	10/11/16		XYZ	GRAINS	PURCH	STKRM	0	Loaf (24ct)	\$0.0000	5	Slice	\$0.2396	\$0.2396
1234-001	banana	10/12/16	Sysco	dole	PRODUCE			3	case	\$13.8900	0	Bunch	\$0.0000	\$13.8900
9020-001	APPLESAUCE.CND.SWTND.WO/SALT	10/12/16	Sysco	Libby's	F/V, CND	PURCH	STKRM	0	Case 6/#10 cans	\$0.0000	2	#10 Can	\$3.2100	\$3.2100
18036-001	BREAD.MIXED-GRAIN	10/12/16		XYZ	GRAINS	PURCH	STKRM	1	Loaf (24ct)	\$1.1500	0	Slice	\$0.0000	\$1.1500
1234-001	banana	10/21/16	Sysco	dole	PRODUCE			4	case	\$18.5200	0	Bunch	\$0.0000	\$18.5200
9240-001	PEACHES.CND.LT SYRUP	10/31/16		US Blue	F/V, CND	PURCH	STKRM	1	Case 6/#10	\$26.9000	0	#10 Can	\$0.0000	\$26.9000
19335-001	SUGARS.GRANULATED	11/16/16	TEST Vendor	Imperial	SPICE	PURCH	STKRM	1	Bag 50#	\$6.5100	0	Bag 50#	\$0.0000	\$6.5100
1042-001	CHEESE.PAST PROCESS.AMERICAN.W/DI NA PO4	5/18/17	Sysco	Land O Lakes	DAIRY	PURCH	CLR	3	Case 4 cartons	\$31.0800	2	Carton (160 slices)	\$5.1800	\$36.2600
23-001	Strawberry Milk FF MooMoo Dairy	5/18/17	Moo Moo dairy	Moo Moo	XDairy, F	PURCH	CLR	0	50 ct	\$0.0000	10	carton	\$2.1500	\$2.1500
11124-002	CARROTS, RAW	5/23/17	Sysco	ABC-Shredded	PRODUCE	PURCH	CLR	1	Case 4/5#	\$10.6300	1	Bag 5#	\$2.6575	\$13.2875
1082-001	MILK.LOWFAT,1%	5/23/17	Sysco	Hiland	DAIRY	PURCH	CLR	1	Case 50ct	\$10.6500	0	Carton	\$0.0000	\$10.6500

## Inventory on Hand - Summary

The Inventory on Hand - Summary report lists all product items and consolidates quantities for products regardless of receive date and costs. This report can either be Consolidated (which means that items are not grouped by site) or not.

### Consolidated

Inventory on Hand										
All Sites										Heartland School Solutions
										All Dates
Report Type:		Summary				Order By:		Product Number		
Consolidated:		Yes								
Product Number	Description	Brand	Product Category	Usage Category	Storage Category	Purch Unit Qty	Unit	Stock Unit Qty	Unit	Extended Cost
02-001	ROLLS, HAMBURGER WW	SARAH LEE	GRAINS	PURCH	STKRM	449	CASE 6/BAGS	2.5	BAG 30 COUNT	\$1,067.1999
03-001	CORN, CANNED YELLOW	LIBBY	VEG, CN	PURCH	STKRM	10	CASE 6 / #10 CAN	4	#10 CAN	\$141.1767
03-002	CORN, CANNED YELLOW	ABC	VEG, CN	PURCH	STKRM	2	Case 6/#10	2	#10 Can	\$35.0000
088-001	Chocolate Milk FF MooMoo Dairy	MooMoo Dairy	XDairy, F	PURCH	CLR	0	case 50 Ct	-4	Carton	-\$0.8600
1000-001	STOCK POT (20qt), Stainless Steel w/Lid	RKO	SMALLWARES	SUPPL	STKRM	3	Stockpot (20qt)	0	Stockpot (20qt)	\$171.8100
1001-001	STOCK POT (20qt) Aluminum w/Lid	RKO	SMALLWARES	SUPPL	STKRM	2	Stockpot (20qt)	0	Stockpot (20qt)	\$47.9800
1042-001	CHEESE,PAST PROCESS,AMERICAN,W/DI NA PO4	Land O Lakes	DAIRY	PURCH	CLR	9	Case 4 cartons	3	Carton (160 slices)	\$121.2900
1082-001	MILK,LOWFAT,1%	Hiland	DAIRY	PURCH	CLR	11	Case 50ct	2	Carton	\$124.7272

### Not Consolidated

Inventory on Hand										
All Sites										Heartland School Solutions
										All Dates
Report Type:		Summary				Order By:		Product Number		
Consolidated:		No								
Product Number	Description	Brand	Product Category	Usage Category	Storage Category	Purch Unit Qty	Unit	Stock Unit Qty	Unit	Extended Cost
Adams Elementary - 5										
02-001	ROLLS, HAMBURGER WW	SARAH LEE	GRAINS	PURCH	STKRM	0	CASE 6/BAGS	0.5	BAG 30 COUNT	\$0.0000
03-001	CORN, CANNED YELLOW	LIBBY	VEG, CN	PURCH	STKRM	2	CASE 6 / #10 CAN	2	#10 CAN	\$29.2600
03-002	CORN, CANNED YELLOW	ABC	VEG, CN	PURCH	STKRM	2	Case 6/#10	2	#10 Can	\$35.0000
1000-001	STOCK POT (20qt), Stainless Steel w/Lid	RKO	SMALLWARES	SUPPL	STKRM	2	Stockpot (20qt)	0	Stockpot (20qt)	\$114.5400
1001-001	STOCK POT (20qt) Aluminum w/Lid	RKO	SMALLWARES	SUPPL	STKRM	1	Stockpot (20qt)	0	Stockpot (20qt)	\$23.9900
1042-001	CHEESE,PAST PROCESS,AMERICAN,W/DI NA PO4	Land O Lakes	DAIRY	PURCH	CLR	7	Case 4 cartons	3	Carton (160 slices)	\$80.2900

## Inventory on Hand - Category Breakdown

The Inventory on Hand - Category Breakdown report lists the inventory on-hand costs broken down by category.

Inventory on Hand										
All Sites										Heartland School Solutions
District Warehouse - 3										
Product Category	Total									
Beans, Canned	\$213.2434									
Breads and Grains	\$84.2700									
Fruits, Vegetables, Cnd	\$58.5015									
Fruits, Vegetables, Fresh	\$33.1055									
Meats, Frzn	\$2,372.8500									
Milk, cheese, yogurt	\$41.0000									
<b>Total:</b>	<b>\$2,802.97</b>									
Usage Category	Total									
Purchased Food	\$2,739.6703									
<b>Total:</b>	<b>\$2,739.67</b>									
Storage Category	Total									
Cooler	\$48.6725									
Freezer	\$2,372.8500									
Stockroom	\$318.1478									
<b>Total:</b>	<b>\$2,739.67</b>									



## Inventory Transactions Report

The Inventory Transactions report shows the change in inventory quantities and the value as a result of transactions such as receiving, physical counts, usage, etc. The report is grouped by site and a grand total displays on the last page. There are several filter options: Site, Site Group, Product, Usage, and Storage Categories, Product Number or Descriptions, Inventory Transaction Type, Adjustment Reason, Unit (either Stock Units only or both Stock and Purchase Units), Start and End Date (these default to the current date), and Order By.

**Note:** The Usage Reason is used in conjunction with “Usage” as an Inventory Transaction Type.

The Report Type drop-down menu lets you run either a Detailed report or a Summary with Category Breakdown. If running a Summary with Category Breakdown, you may only select the following Inventory Transaction Types: blank [none selected], Receiving, Transfer In, and Transfer Out.

Inventory Transactions											Heartland School Solutions
All Sites											6/1/19 - 2/19/20
<b>Unit:</b>	Stock Units					<b>Report Type:</b>	Detailed				
<b>Order By:</b>	Transaction Date										
<b>Adams Elementary - 5</b>											
Transaction Type	Transaction Date	From	To	Product Number	Description	Reason/Exception	Comment	Unit Qty	Unit	Unit Cost	Extended Cost
Receiving	6/19/2019	Sysco	Adams Elementary - 5	60001-001	Chicken Patty			300	Patty 2.9 oz	\$0.8083	\$242.50
Adjustment	6/19/2019	Adams Elementary - 5	Adams Elementary - 5	902428-001	MILK,CHOCOLATE,F AT FREE	Spoilage		-40	Carton	\$0.2150	(\$8.60)
Adjustment	6/19/2019	Adams Elementary - 5	Adams Elementary - 5	902428-001	MILK,CHOCOLATE,F AT FREE	Spoilage		-10	Carton	\$0.2150	(\$2.15)

## Inventory Transfer Report

The Inventory Transfer report contains pertinent information on site-to-site transfers and the products being requested. There are several filter options: Sending Site, Receiving Site, Receiving Site Group, Entered By, Status, Transfer Committed, Transfer Start and End Date, Requisition #, and Include Transfer Comments. You may also choose how to sort the report using the options under Order By.

When generating the report, in addition to the Display Type options of Excel, PDF, and Word, you have the option “PDF - Individual Site Sheet.” This takes a PDF and splits out each site on separate pages so that the report can be used as a delivery sheet.

Inventory Transfer Report								Heartland School Solutions
								All Dates
<b>Comments Included:</b>	Yes			<b>Order By:</b>	Product #			
<b>Adams Elementary - 5</b>								
<b>July 18, 2017 - Transfer # 26</b>							<b>Transfer Status: Received</b>	
Product #	Product Description	Product Category	Usage Category	Storage Category	P/U QTY	S/U QTY	Cost	
11124-001	CARROTS, RAW	Fruits, Vegetables, Fresh	Purchased Food	Cooler	1	1	\$12.7875	
9003-001	APPLES,FRESH	Fruits, Vegetables, Fresh	Purchased Food	Stockroom	1	1	\$25.8871	
902432-001	BEANS,SNAP,GREEN,CND	Beans, Canned	Purchased Food	Stockroom	8	1	\$141.2017	
<b>November 10, 2017 - Transfer # 38</b>							<b>Transfer Status: Received</b>	
Product #	Product Description	Product Category	Usage Category	Storage Category	P/U QTY	S/U QTY	Cost	
02-001	ROLLS, HAMBURGER WW	Breads and Grains	Purchased Food	Stockroom	6	0	\$0.0000	
<b>October 05, 2016 - Transfer # 1</b>							<b>Transfer Status: Requested</b>	
Product #	Product Description	Product Category	Usage Category	Storage Category	P/U QTY	S/U QTY	Cost	
18967-001	BREAD,WHEAT	Breads and Grains	Purchased Food	Stockroom	1	0		
<b>June 20, 2017 - Transfer # 24</b>							<b>Transfer Status: Requested</b>	
Product #	Product Description	Product Category	Usage Category	Storage Category	P/U QTY	S/U QTY	Cost	

## Inventory Usage Report

The Inventory Usage report lists the quantity and value of the items that were withdrawn from inventory as usage. An average cost per meal can also be provided on the report if total meals were entered as part of the usage transaction. There are several filter options: Site, Site Group, Usage Reason, Display Type, Start Date, End Date, Group By. To view inventory usage costs for one day, enter the same Start Date and End Date. To view inventory usage for a longer period, enter a date range.

Inventory Usage Report Detailed								Heartland School Solutions
								9/13/17 - 9/13/17
<b>Site:</b>	T Jefferson Elementary			<b>Group By:</b>	Date			
<b>September 13, 2017</b>								
<b>T Jefferson Elementary - 1</b>								<b>Lunch</b>
Product #	Description	Product Category	CMNTY	P/U Qty	P/U Description	S/U Qty	S/U Description	Total Cost
02-001	ROLLS, HAMBURGER WW	Breads and Grains		0	CASE 6/BAGS	5	BAG 30 COUNT	\$12.80
1082-001	MILK,LOWFAT,1%	Milk, cheese, yogurt		1	Case 50ct	36	Carton	\$22.33
11124-001	CARROTS,RAW-----VERY LONG DISCRPTION IN THIS FIEL	Fruits, Vegetables, Fresh		0	Case 4/5# Bags	3	Bag 5#	\$10.17
60001-001	Chicken Patty	Meats, Frozen		2	Case (60ct)	30	Patty 2.9 oz	\$49.88
<b>Total:</b>								<b>\$95.18</b>
<b>Total Meals:</b>								<b>164</b>
<b>Average Cost Per Meal:</b>								<b>\$0.58</b>

## Invoice Reconciliation Report

The Invoice Reconciliation report provides a list of invoices within a specified date range in order to reconcile Mosaic receiving records and Vendor invoices. The report displays total quantities and a grand total on the last page. There are several filter options: Site, Site Group, Receiving Type, Fulfillment Status, PO #, Order By options, Committed Status, Vendor, Received date range, and Invoice #. You may display the report as a PDF, Word file, or Excel spreadsheet.

Invoice Reconciliation Report							Heartland School Solutions
							6/13/17 - 7/28/17
<b>Site:</b>	Adams Elementary			<b>Receiving Type:</b>	Vendor Order		
<b>Order By:</b>	Invoice #						
Invoice #	PO #	Vendor	Receiving Site	Receive Date	Fulfillment Status	Qty	Total
	27	Sysco	Adams Elementary	7/25/2017	Partial	10	\$95.98
	40	Sysco	Adams Elementary	7/17/2017	Full	6	\$90.14
123	7	US Foods	Adams Elementary	6/13/2017	Rejected	0	\$0.00
123	16	Sysco	Adams Elementary	7/25/2017	Full	2	\$14.86
123ABC	8	US Foods	Adams Elementary	7/25/2017	Full	11	\$245.00
ABC987	46	TEST Vendor	Adams Elementary	7/28/2017	Full	12	\$184.32
<b>Total:</b>						<b>41</b>	<b>\$620.30</b>

## Warehouse/Central Kitchen Item Availability Report

The Warehouse/Central Kitchen Item Availability report provides a report that shows warehouse or central kitchen inventory that is On Hand, On Order, Reserved, and which items are in negative quantities or unavailable to be transferred.

First, select the type of site being used for the report, either Warehouse or Central Kitchen.

There are several filter options: Site, Product # or Description, Product Category, Usage Category, Storage Category, Display Type, Active, Through Date, Needs Attention, Shortages, Group By, Order By, Include Submitted Orders, and Only Show Products With Activity.

The Through Date filter allows you to take inventory recorded up to a specified date. The Item Availability report will indicate the Through Date above the inventory table.

The Include Submitted Orders filter, if set to “Yes,” allows you to see the total quantity on Central Kitchen or Warehouse Orders even if those orders have not yet been approved. The submitted quantity is combined with the approved quantity and displayed in the Qty Reserved column.

The Only Show Products With Activity filter allows you to exclude items from the report that do not show any activity in the date range. When set to “Yes”, you will only see items with activity in your search results. In this report, “Activity” is defined as being submitted or committed to orders.

Warehouse Item Availability				Heartland School Solutions			
<b>Site:</b>	District Warehouse	<b>Only Show Items With Activity:</b>	Yes				
<b>Active:</b>	Yes	<b>Order By:</b>	Description				
<b>District Warehouse</b>							
Item #	Description	Purchase Unit	Qty On Hand	Qty Reserved	Qty Available	Qty Shortage	Qty On Order
9003-001	APPLES,FRESH	Case 113ct Each	0.99	3.01		-2.02	
1234-001	banana	case Bunch		5.1		-5.1	
902432-001	BEANS,SNAP,GREEN,CND	Case 6/#10 #10 Can	12.33	4.33	8		
601476-001	BEEF FLAMEBROIL PATTY	Case (135ct) Sleeve (27ct)	24	2	22		
23567-001	BEEF,GROUND,85% LN MEAT / 15% FAT,RAW	Case (4 Chubs) Chub (10#)	14	18.25		-4.25	
1042-001	CHEESE,PAST PROCESS,AMERICAN,W/DI NA PO4	Case 4 cartons Carton (160 slices)	2	6.25		-4.25	
123456792-001	Chicken Patty CKD BRD 16051	Case/150/Patty 3.29 oz Patty 3.29 oz		1		-1	
03-001	CORN, CANNED YELLOW	CASE 6 / #10 CAN #10 CAN		5.33		-5.33	
1082-001	MILK,LOWFAT,1%	Case 50ct Carton		5.02		-5.02	
02-001	ROLLS, HAMBURGER WW	CASE 6/BAGS BAG 30 COUNT	390.67	7.17	383.5		

## Additional Inventory Reports

Additional Inventory reports are available in various areas of the program. Review the following list for report details and locations.

### Inventory Value Report

From the left-hand navigation panel, click **Inventory**. Then, select **Inventory Value Report**.

Once you have entered counts for items in your inventory, you can run an Inventory Value report.

The Inventory Value report shows all of the items and the quantities that are shown in your on-hand physical counts. This report shows the quantity and value of all items based on the chosen filters. The Inventory Value report can be printed for a single site or for all sites into one consolidated value.

To generate an Inventory Value report, select a site, or select All Sites to include inventory from every site. If you want to search for specific inventory items, enter criteria in the Description, Ingredient #, and Classification fields. Choose whether you want to include items with a quantity of zero. You can sort the report by source and run it for active and inactive ingredients. When you have entered all the desired criteria, click **View**.

MOSAIC Inventory Value Report Consolidated								
Ing #	Description	Source	Physical Count	Purchase Unit	Physical Count	Stock Unit	Purchase Unit Cost	Inv. Value
12061	ALMONDS	USDA		Case 4 Bags		Bag (5#)	\$39.00	\$0.00
50356	APPLES, CANNED, UNSWEETENED, SLICED, IN WATER	USDA		Case 6/#10		#10 CAN	\$2.75	\$0.00
900037	APPLES,CND,H2O PK,SLCD,DRN	LOCAL		Case 6/#10		#10 CAN, drained	\$29.25	\$0.00
901667	APPLES,CND,WATER PACK,SLCD	LOCAL		Case		#10 CAN	\$15.75	\$0.00
9003	APPLES,RAW,WITH SKIN	USDA		case 10#		medium (3 per LB)	\$16.75	\$0.00
9026	APRICOTS,CND,LT SYRUP PK,W/SKN,SOL&LIQUIDS	USDA		Case 6/#10		#10 CAN	\$25.00	\$0.00
601476	BEEF FLAMEBROIL PATTY # 155-525 ADVANCE FOOD	LOCAL		Case (135ct)		SLEEVE (27ct)	\$31.25	\$0.00
23567	BEEF,GROUND,85% LN MEAT / 15% FAT,RAW	USDA		Case (4 Chubs)		Chub (10#)	\$95.00	\$0.00



## Inventory Worksheets

From the left-hand navigation panel, click **Inventory**. Then, select **Inventory Worksheets**.

The Inventory Worksheet is a blank worksheet you can print out so that you can hand-write the physical counts of items found in a site's inventory. You are only able to select one school site at a time. There are four different print options: by Class, Alphabetical, Numerical, and by USDA commodities.

To generate an Inventory Worksheet, select a site. If you want to search for specific inventory items, enter criteria in the Description, Ingredient #, and Classification fields. Choose whether you want to include items with a quantity of zero. You can sort the report by source and run it for active and inactive ingredients. When you have entered all the desired criteria, click **View**.

Note that there are two Physical Count fields to update for each item: Purchase Unit (the larger unit that is shipped from suppliers) and Stock Unit (the smaller unit this is used to stock shelves). Make sure to update both counts when recording on-hand counts.

<b>MOSAIC</b> <b>Inventory Worksheet</b> <b>Adams Elementary</b>								
Ing #	Description	Source	Physical Count	Purchase Unit	Physical Count	Stock Unit	Cost Change	Purchase Unit Cost
12061	ALMONDS	USDA		Case 4 Bags		Bag (5#)		\$39.00
50356	APPLES, CANNED, UNSWEETENED, SLICED, IN WATER	USDA		Case 6/#10		#10 CAN		\$15.00
900037	APPLES,CND,H2O PK,SLCD,DRN	LOCAL		Case 6/#10		#10 CAN, drained		\$29.25
901667	APPLES,CND,WATER PACK,SLCD	LOCAL		Case		#10 CAN		\$15.75
9003	APPLES,RAW,WITH SKIN	USDA		case 10#		medium (3 per LB)		\$16.75
9026	APRICOTS,CND,LT SYRUP PK,W/SKN,SOL&LIQUIDS	USDA		Case 6/#10		#10 CAN		\$25.00
601476	BEEF FLAMEBROIL PATTY # 155-525 ADVANCE FOOD	LOCAL		Case (135ct)		SLEEVE (27ct)		\$31.25
23567	BEEF GROUND 85% LN MEAT / 15% FAT RAW	USDA		Case (4		Chub		\$95.00

# REPORTS

## Menu Planning

Click on the report name in the table to be redirected to the specific report in the manual.

Contribution Report	Menu Spreadsheets (con't)
<a href="#">Menu Contribution Report</a>	<a href="#">Offered - Portion</a>
<a href="#">Meal Group Contribution Report</a>	<a href="#">Served - Weighted</a>
<a href="#">Menu Names &amp; Nutrient Standards</a>	<a href="#">Served - Portion</a>
<a href="#">Menu Plan Calendar</a>	<a href="#">Base - Weighted</a>
<a href="#">Menu Plan Projection</a>	<a href="#">Base - Portion</a>
<a href="#">Menu Plan Projection Report - Planned Quantities</a>	<a href="#">Production Planning Recap</a>
<a href="#">Menu Plan Projection Report - Served Quantities</a>	<a href="#">Production Planning Shopping List</a>
<a href="#">Menu Spreadsheets</a>	<a href="#">Production Records</a>
<a href="#">Planned - Weighted</a>	<a href="#">Production Summary</a>
<a href="#">Planned - Portion</a>	<a href="#">Weekly Requirements</a>
<a href="#">Offered - Weighted</a>	

## Contribution Report

The Contribution Report is available in multiple report formats: Menu Contribution and Meal Group Contribution. The report analyzes the daily meal menus (breakfast or lunch) of a selected time frame and menu name. This report allows you to check what and how many components are offered in their meal plans. This report is used to ensure that all contributions are represented in menus and that the meals can be counted as reimbursable.

### Menu Contribution Report

<b>MOSAIC</b>													
<b>Menu Contribution Report</b>													
<b>HHFKA Lunch 9-12</b>										<b>HHFKA-Lunch-9-12 (age 14-18)</b>			
<b>Monday 11/03/2014</b>													
Recipe #	Recipe Name	Portion Size	M/MA oz eq	Grains oz eq	Fruit cup	Veg cup	Milk cup	Whole Grain oz eq	Veg Drk Grn cup	Veg Red/Org cup	Veg Legume cup	Veg Starchy cup	Veg Other cup
1087	GROUND BEEF & MACARONI	CUP	2.500	1.000	0.000	0.375	0.000			0.250			0.125
500006	BAKED CAJUN FISH	1 PIECE	2.000	0.000	0.000	0.000	0.000						
1092	CHICKEN FILLET SANDWICH	SANDWICH	2.000	2.000	0.000	0.000	0.000	2.000					
1088	ORANGE GLAZED SWEET POTATOES	1/2 CUP	0.000	0.000	0.000	0.500	0.000			0.500			
500005	BAKED BEANS (VEGETARIAN)	SERVINGS	0.000	0.000	0.000	0.500	0.000				0.500		
68	BANANAS	EACH	0.000	0.000	0.500	0.000	0.000						
500047	APPLE COBBLER	SERVINGS	0.000	1.000	0.500	0.000	0.000						
500088	CORNBREAD	SERVINGS	0.000	2.000	0.000	0.000	0.000						
1090	ITALIAN DRESSING	TBSP	0.000	0.000	0.000	0.000	0.000						
1091	DAILY SALAD	SERVING	0.000	0.000	0.000	1.000	0.000		0.500	0.250			0.250
437	PEACHES: canned,light syrup	CUP	0.000	0.000	1.000	0.000	0.000						
99	STRAWBERRIES,FRESH	CUP	0.000	0.000	1.000	0.000	0.000						
1089	MARGARINE	TSP	0.000	0.000	0.000	0.000	0.000						
1093	MAYONNAISE: LOW CALORIE	2 TSP	0.000	0.000	0.000	0.000	0.000						
1094	CHERRY TOMATOES	1/2 CUP	0.000	0.000	0.000	0.500	0.000			0.500			
500095	CREAMY DIP FOR FRESH VEGETABLE	2 TBSP	0.000	0.000	0.000	0.000	0.000						
231	MILK,Skim	HALF PINT	0.000	0.000	0.000	0.000	1.000						
230	MILK,1% Lowfat	HALF PINT	0.000	0.000	0.000	0.000	1.000						
<b>Total</b>			<b>6.500</b>	<b>6.000</b>	<b>3.000</b>	<b>2.875</b>	<b>2.000</b>	<b>2.000</b>	<b>0.500</b>	<b>1.500</b>	<b>0.500</b>		<b>0.375</b>

## Meal Group Contribution Report

MOSAIC													
Meal Group Contribution Report													
HHFKA Lunch 6-8							HHFKA-Lunch-6-8 (age 11-13)						
Tuesday 12/02/2014													
Tuesday Meal 1													
Recipe #	Recipe Name	Portion Size	M/MA oz eq	Grains oz eq	Fruit cup	Veg cup	Milk cup	Whole Grain oz eq	Veg Drk Grn cup	Veg Red/Org cup	Veg Legume cup	Veg Starchy cup	Veg Other cup
1095	ROAST PORK	2 OZ	2.000	0.000	0.000	0.000	0.000						
1091	DAILY SALAD	SERVING	0.000	0.000	0.000	1.000	0.000		0.500	0.250			0.250
1096	BROWN RICE: STEAMED	CUP	0.000	2.000	0.000	0.000	0.000	2.000					
1097	HONEY FRENCH DRESSING	TBSP	0.000	0.000	0.000	0.000	0.000						
1098	PEAS: frozen,boiled	1/2 CUP	0.000	0.000	0.000	0.500	0.000					0.500	
1099	MIXED FRUIT: CANNED XTRA LIGHT SYRUP	CUP	0.000	0.000	1.000	0.000	0.000						
230	MILK,1% Lowfat	HALF PINT	0.000	0.000	0.000	0.000	1.000						
231	MILK,Skim	HALF PINT	0.000	0.000	0.000	0.000	1.000						
<b>Total</b>			2.000	2.000	1.000	1.500	2.000	2.000	0.500	0.250		0.500	0.250
Tuesday Meal 2													
Recipe #	Recipe Name	Portion Size	M/MA oz eq	Grains oz eq	Fruit cup	Veg cup	Milk cup	Whole Grain oz eq	Veg Drk Grn cup	Veg Red/Org cup	Veg Legume cup	Veg Starchy cup	Veg Other cup
1100	CHICKEN SALAD	1/2 CUP	2.000	0.000	0.000	1.000	0.000						
1091	DAILY SALAD	SERVING	0.000	0.000	0.000	1.000	0.000		0.500	0.250			0.250
1097	HONEY FRENCH DRESSING	TBSP	0.000	0.000	0.000	0.000	0.000						
1098	PEAS: frozen,boiled	1/2 CUP	0.000	0.000	0.000	0.500	0.000					0.500	
1099	MIXED FRUIT: CANNED XTRA LIGHT SYRUP	CUP	0.000	0.000	1.000	0.000	0.000						
1101	BREAD WHOLE WHEAT	2 SLICES	0.000	2.000	0.000	0.000	0.000	2.000					
230	MILK,1% Lowfat	HALF PINT	0.000	0.000	0.000	0.000	1.000						
231	MILK,Skim	HALF PINT	0.000	0.000	0.000	0.000	1.000						
<b>Total</b>			2.000	2.000	1.000	1.500	2.000	2.000	0.500	0.250		0.500	0.250
Tuesday Meal 3													
Recipe #	Recipe Name	Portion Size	M/MA oz eq	Grains oz eq	Fruit cup	Veg cup	Milk cup	Whole Grain oz eq	Veg Drk Grn cup	Veg Red/Org cup	Veg Legume cup	Veg Starchy cup	Veg Other cup
1102	PEANUT BUTTER & JELLY SANDWICH	SANDWICH	1.000	2.000	0.000	0.000	0.000	2.000					
422	GRAPES,Fresh	CUP	0.000	0.000	1.000	0.000	0.000						
1098	PEAS: frozen,boiled	1/2 CUP	0.000	0.000	0.000	0.500	0.000					0.500	
1103	MIXED NUTS: WITHOUT PEANUTS	1/4 CUP	1.000	0.000	0.000	0.000	0.000						
1104	BROCCOLI: FRESH STEAMED	1/2 CUP	0.000	0.000	0.000	0.500	0.000		0.500				
230	MILK,1% Lowfat	HALF PINT	0.000	0.000	0.000	0.000	1.000						
231	MILK,Skim	HALF PINT	0.000	0.000	0.000	0.000	1.000						
<b>Total</b>			2.000	2.000	1.000	1.000	2.000	2.000	0.500			0.500	
<b>Grand Total</b>			6.000	6.000	3.000	4.000	6.000	6.000	1.500	0.500		1.500	0.500

## Menu Names & Nutrient Standards

The Menu Names and Nutrient Standards report allows you to print a list of all of the established Menus, as well as produce a list of all of the HHFKA Menu Nutrient Guidelines.

MOSAIC													
Menu Names & Nutrient Standards													
<b>User Defined Healthy Hunger Free Kids Act Nutrient Menu Groups</b>													
Menu Name	Cals <sup>2</sup> Min-Max	S-Fat <sup>2</sup> CALC %	Sodm <sup>2</sup> (mg)	Sugars <sup>1</sup> (g)	Total Fat <sup>1</sup> CALC %	Cholst <sup>1</sup> (mg)	Carb <sup>1</sup> (g)	Fiber <sup>1</sup> (g)	Protn <sup>1</sup> (g)	Vit-A <sup>1</sup> (IU)	Calcm <sup>1</sup> (mg)	Vit-C <sup>1</sup> (mg)	Iron <sup>1</sup> (mg)
Breakfast HHFKA K-5 HHFKA - Breakfast - K-5 (age 5-10)	350 - 500	<10.0%	540	*N/A*	<=*N/A*%	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*
HHFKA Lunch 6-8 HHFKA - Lunch - 6-8 (age 11-13)	600 - 700	<10.0%	1360	*N/A*	<=*N/A*%	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*
HHFKA Lunch 9-12 HHFKA - Lunch - 9-12 (age 14-18)	750 - 850	<10.0%	1420	*N/A*	<=*N/A*%	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*
HHFKA Lunch K-5 HHFKA - Lunch - K-5 (age 5-10)	550 - 650	<10.0%	1230	*N/A*	<=*N/A*%	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*
HHFKA Lunch K-8 HHFKA - Lunch - K-8 (age 5-13)	600 - 650	<10.0%	1230	*N/A*	<=*N/A*%	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*
Test Menu HHFKA - Lunch - 9-12 (age 14-18)	750 - 850	<10.0%	1420	*N/A*	<=2.0%	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*

MOSAIC													
Menu Names & Nutrient Standards													
<b>Healthy Hunger Free Kids Act Nutrient Standards</b>													
Menu Name	Cals <sup>2</sup> Min-Max	S-Fat <sup>2</sup> CALC %	Sodm <sup>2</sup> (mg)	Sugars <sup>1</sup> (g)	Total Fat <sup>1</sup> CALC %	Cholst <sup>1</sup> (mg)	Carb <sup>1</sup> (g)	Fiber <sup>1</sup> (g)	Protn <sup>1</sup> (g)	Vit-A <sup>1</sup> (IU)	Calcm <sup>1</sup> (mg)	Vit-C <sup>1</sup> (mg)	Iron <sup>1</sup> (mg)
HHFKA - Breakfast - 6-8 (age 11-13)	400 - 550	<10.0%	600	*N/A*	<=*N/A*%	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*
HHFKA - Breakfast - 9-12 (age 14-18)	450 - 600	<10.0%	640	*N/A*	<=*N/A*%	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*
HHFKA - Breakfast - K-12 (age 5-18)	450 - 500	<10.0%	540	*N/A*	<=*N/A*%	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*
HHFKA - Breakfast - K-5 (age 5-10)	350 - 500	<10.0%	540	*N/A*	<=*N/A*%	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*
HHFKA - Breakfast - K-8 (age 5-13)	400 - 500	<10.0%	540	*N/A*	<=*N/A*%	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*
HHFKA - Lunch - 6-8 (age 11-13)	600 - 700	<10.0%	1360	*N/A*	<=*N/A*%	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*
HHFKA - Lunch - 9-12 (age 14-18)	750 - 850	<10.0%	1420	*N/A*	<=*N/A*%	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*
HHFKA - Lunch - K-5 (age 5-10)	550 - 650	<10.0%	1230	*N/A*	<=*N/A*%	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*
HHFKA - Lunch - K-8 (age 5-13)	600 - 650	<10.0%	1230	*N/A*	<=*N/A*%	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*	*N/A*



# REPORTS

## Menu Plan Calendar

Menu Plan Calendar Export lets you run a report that shows nutritional information for menu plan items over the course of a month. This is good whether you want to print out a calendar for parents or display the month's meals internally.

Menu Plan Calendar reports can only be run after creating a **Format** that defines what will be shown on the report. For more information on how to set up Menu Plan Calendar Formats, see the **Setup** section of this guide.

To run a Menu Plan Calendar report, first select the Calendar Format. This will determine what information is displayed on the report. Then, select a Menu Name or a Site. When selecting a menu, you can narrow the report down to a site or leave the Sites field blank to run the report for all available sites. When selecting a specific site, only menus that are enabled for that site will be available to select in the Menu Name field.

When selecting a date range, note that the End Date will automatically change to the date 6 weeks from the Start Date and vice versa.

Using the Display Type drop-down, you can export this report to a PDF file, a Word document, or view it as a web page in Mosaic.

After making your selections, depending on your Display Type, click **Preview** or **Download**.

**Menu Plan Calendar Export**

Calendar Format:

Menu Name:

Sites:

Start Date:

End Date:

Display Type:


[Preview](#)

The Menu Plan Calendar will open in a new tab. If the calendar is a PDF preview, you may click **Download PDF** to download the calendar file.

**PDF Preview**

[Download PDF](#)

Test Menu Calendar  
HHFKA K-5 (age 5-10)

 **GREECE ATHENA HIGH SCHOOL**  
*One Vision, One Team, One Greece*

Monday	Tuesday	Wednesday	Thursday	Friday
<b>7</b> HAMBURGER ON A BUN:W W FRENCH FRIES: oven heat CARROTS, BABY, RAW APPLES,Fresh MILK, Non Fat Chocolate MILK,Skim	<b>8</b> HAMBURGER ON A BUN:W W FRENCH FRIES: oven heat CARROTS, BABY, RAW APPLES,Fresh MILK, Non Fat Chocolate MILK,Skim	<b>9</b> HAMBURGER ON A BUN:W W FRENCH FRIES: oven heat CARROTS, BABY, RAW APPLES,Fresh MILK, Non Fat Chocolate MILK,Skim	<b>10</b> HAMBURGER ON A BUN:W W FRENCH FRIES: oven heat CARROTS, BABY, RAW APPLES,Fresh MILK, Non Fat Chocolate MILK,Skim	<b>11</b> HAMBURGER ON A BUN:W W FRENCH FRIES: oven heat CARROTS, BABY, RAW APPLES,Fresh MILK, Non Fat Chocolate MILK,Skim

## Menu Plan Projection

The Menu Plan Projection report allows users to view a list of recipes that are being served in a given date range from a specific menu, and displays what would happen to the nutrient values if the number of meals, cost, or nutrients changed from the original menu (projections).

1. Establish a Start and End Date. This will determine what information is displayed on the report. By default, the date range is one week from the current day.
2. Select a Menu Name.
3. Use the drop-down menu to select Planned or Served Totals.
4. Select a Site Group.
5. You can narrow the report down to a site or leave the Sites menu blank to run the report for all available sites.
6. Click View.

7. The existing Planned or Served Totals, meal cost, and the nutrient values are displayed. You may change the total Meals Planned/Meals Served counts, Planned Reimbursable counts, Portion Cost, and Nutrient values to view projected changes. Values that are changed from the initial results are highlighted.
8. When you are done, click **Print**.

Home > Reports > Menu Planning > Menu Plan Projection > Results

Elementary Lunch-Traditional  
All Sites  
6/22/2020 - 6/25/2020  
Planned Quantities  
Meals Planned:

Daily Average	Actual Values		Projected Values	
	Total	% Of Cals	Total	% Of Cals
Cost	4.425		4.424	
Calories	783		783	
Total Fat	21.09	24.24%	21.09	24.24%
Saturated Fat	6.05	6.95%	6.05	6.95%
Cholesterol	43		43	
Sodium	1050		1050	

Menu Item	Portion Size	ACTUAL VALUES - Individual Item						
		Planned Reimbursable	Portion Cost	Calories	Fat g	Sat Fat g	Cholst Mg	Sodium Mg
000006 - APPLE COBBLER	SERVINGS	100	0.131	269	11.5	2.89	0	98
990049 - APPLE CRISP	SERVINGS	449	0.057	187	7.74	1.56	0	114
000064 - APPLES,Fresh	EACH	902	0.429	55	0.18	0.03	0	1
900012 - BAKED BEANS (VEGETARIAN):veg	SERVINGS	380	0.125	160	0.66	0.11	0	455
900014 - BANANAS	EACH	590	0	90	0.33	0.11	0	1

The report displays the original Planned/Served values and the Projected Values with the reflected changes.

## Menu Plan Projection Report - Planned Quantities

Menu Plan Projection Report				MOSAIC				
Planned Quantities				9/13/17 - 9/13/17				
Menu Names:		6 HHFKA Lunch K-5		Sites:		1-GEO WA, 2-SBAELE, 3-CLINTO		
6 HHFKA Lunch K-5				Actual Values		Projected Values		
9/13/17 - 9/13/17				Daily Average	Total	% Of Cals	Total	% Of Cals
Planned Quantities				Cost	0.8471		0.847	
Meals Planned: 350				Calories	1251		329	
				Total Fat	37.31	26.84%	9.82	26.86%
				Saturated Fat	16.57	11.92%	4.36	11.93%
				Cholesterol	109		29	
				Sodium	2029		534	
Menu Item	Portion Size	Planned Meals	Portion Cost	Calories'	Fat g	Sat Fat' g	Cholst Mg	Sodium' Mg
500016 - BEAN BURRITO	SERVINGS	100	\$0.570	288	7.93	3.52	13	662
500020 - BEEF BURRITO	EACH	150	\$0.570	273	12.46	5.75	43	351
270 - CORN: canned, yellow	CUP	50	\$0.120	116	2.25	0.26	0	305
500122 - MEXICALI CORN	1/4 CUP	200	\$0.140	42	1.33	0.25	0	132
230 - MILK,1% Lowfat	HALF PINT	150	\$0.000	102	2.37	1.55	12	107
900083 - MILK,Skim	HALF PINT	100	\$0.000	83	0.20	0.14	5	103
85 - ORANGES HALVES	1/2 EACH	250	\$0.480	31	0.06	0.01	0	0
<small>*"NA" - denotes a nutrient that is either missing or incomplete for an individual ingredient                      "- " denotes combined nutrient totals with either missing or incomplete nutrient data                      "- " denotes required nutrient values                      NOTICE: The data contained within this report and the Mosaic® Menu Planning and Nutritional Analysis software should not be used for and does not provide menu planning for a child with a medical condition or food allergy. Ingredients and menu items are subject to change or substitution without notice. Please consult a medical professional for assistance in planning for or treating medical conditions.</small>								
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## Menu Plan Projection Report - Served Quantities

Menu Plan Projection Report				MOSAIC				
Served Quantities				9/6/17 - 9/6/17				
Menu Names:		6 HHFKA Lunch K-5		Sites:		1-GEO WA, 2-SBAELE, 3-CLINTO		
6 HHFKA Lunch K-5				Actual Values		Projected Values		
9/6/17 - 9/6/17				Daily Average	Total	% Of Cals	Total	% Of Cals
Served Quantities				Cost	0.8533		0.853	
Meals Served: 150				Calories	496		496	
				Total Fat	14.62	26.53%	14.62	26.53%
				Saturated Fat	6.35	11.52%	6.35	11.53%
				Cholesterol	43		43	
				Sodium	808		808	
Menu Item	Portion Size	Served Meals	Portion Cost	Calories'	Fat g	Sat Fat' g	Cholst Mg	Sodium' Mg
500016 - BEAN BURRITO	SERVINGS	50	\$0.750	288	7.93	3.52	13	662
500020 - BEEF BURRITO	EACH	100	\$0.790	273	12.46	5.75	43	351
270 - CORN: canned, yellow	CUP	100	\$0.070	116	2.25	0.26	0	305
500122 - MEXICALI CORN	1/4 CUP	50	\$0.090	42	1.33	0.25	0	132
230 - MILK,1% Lowfat	HALF PINT	100	\$0.000	102	2.37	1.55	12	107
900083 - MILK,Skim	HALF PINT	50	\$0.000	83	0.20	0.14	5	103
85 - ORANGES HALVES	1/2 EACH	150	\$0.000	31	0.06	0.01	0	0
<small>*"NA" - denotes a nutrient that is either missing or incomplete for an individual ingredient                      "- " denotes combined nutrient totals with either missing or incomplete nutrient data                      "- " denotes required nutrient values                      NOTICE: The data contained within this report and the Mosaic® Menu Planning and Nutritional Analysis software should not be used for and does not provide menu planning for a child with a medical condition or food allergy. Ingredients and menu items are subject to change or substitution without notice. Please consult a medical professional for assistance in planning for or treating medical conditions.</small>								
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## Menu Spreadsheets

The Menu Spreadsheets report is available in multiple report formats: Planned - Weighted, Planned - Portion, Offered - Weighted, Offered - Portion, Served - Weighted, Served - Portion, Base - Weighted, Base - Portion. The menu spreadsheets are intended to be the final document in planning your menus according to the USDA guidelines. There are various report styles to choose from, based on the report type that is selected.

Report Type	Nutrient Analysis Calculations	Report Style	Values Options
Planned	The report calculations for nutrient analysis for planned, offered, and served are based on your entered production quantities and the production site you have selected.	Detailed	Weighted Portion
Offered			
Served			
Base	The report calculations for nutrient analysis are based on the numbers entered in the Reimburse column from your main menu calendar. Sites cannot be selected for the base menu type.		

There are several different search options when printing out Menu Spreadsheets: Search by date range, menu, site, report type (planned, offered, served, base), values (weighted, portion), and nutrients.

Use the drop-down menu to select your Display Type (*CSV, Excel (Tabbed), Excel (Non-Tabbed), PDF, Word*). When you have selected your settings, click **View** to generate the report.

For any Menu Spreadsheet, the end of the menu item list for each day will show the Weighted Daily Average for the nutrients and cost of each item in the menu.

[Home](#) > [Reports](#) > [Menu Planning](#) > **Menu Spreadsheets**

### Menu Spreadsheets Search

Start Date:	9/4/2019	Report Type:	Base
End Date:	9/11/2019	Report Style:	Detailed
Menu Name:	Elementary Lunch-Traditional	Values Option:	Weighted Values
Site:	ALL	Display Type:	PDF
Include Cost:	Yes		

Nutrients:

<input checked="" type="checkbox"/> Calories	<input checked="" type="checkbox"/> Carbohydrate
<input checked="" type="checkbox"/> Sat Fat	<input checked="" type="checkbox"/> Fiber
<input checked="" type="checkbox"/> Sodium	<input checked="" type="checkbox"/> Protein
<input checked="" type="checkbox"/> Sugars	<input checked="" type="checkbox"/> Vitamin A-IU
<input checked="" type="checkbox"/> Total Fat	<input checked="" type="checkbox"/> Calcium
<input checked="" type="checkbox"/> Trans Fat	<input checked="" type="checkbox"/> Vitamin C
<input checked="" type="checkbox"/> Cholesterol	<input checked="" type="checkbox"/> Iron

View



## Planned - Weighted

Planned Menu Spreadsheet																	Heartland School Solutions	
Weighted Values																	Aug 1, 2019 thru Sep 11, 2019	
<b>Menu Name:</b>	Elementary Lunch-Traditional										<b>Include Cost:</b>	Yes						
<b>Site:</b>	All Sites										<b>Report Style:</b>	Detailed						
<b>Tuesday - 08/20/2019</b>																	<b>Reimbursable Meal Total 760</b>	
	Portion Size	Reimb Qty	Cals' (kcal)	S-Fat' (g)	Sodm' (mg)	Sugars (g)	T-Fat (g)	Tr-Fat <sup>2</sup> (g)	Cholst (mg)	Carb (g)	Fiber (g)	Protn (g)	Vit-A (IU)	Calcm (mg)	Vit-C (mg)	Iron (mg)	Cost	
900000 HAMBURGER ON A BUN:WW	SERVING	0	0	0.00	0	*0	0.00	*0.00	0	0.00	0.00	0.00	0	0.0	0.00	0.00	\$0.000	
900015 LASAGNA WITH GROUND BEEF	SERVINGS	760	282	5.59	332	*1	10.25	*0.25	39	27.88	2.64	18.68	849	301.7	9.43	2.97	\$0.151	
000193 Chicken Patty On Bun	Each	0	0	0.00	0	*0	0.00	0.00	0	0.00	0.00	0.00	0	0.0	0.00	0.00	\$0.000	
500405 CAJUN SAUSAGE/TURKEY JAMBALAYA	3/4 CUP	0	0	0.00	0	*N/A*	0.00	*N/A*	0	0.00	0.00	0.00	0	0.0	0.00	0.00	\$0.000	
000162 HOT DOG ON A BUN:turkey hot	SERVING	0	0	0.00	0	*0	0.00	0.00	0	0.00	0.00	0.00	0	0.0	0.00	0.00	\$0.000	
500316 SPANISH CHICKPEA STEW	CUP	0	0	0.00	0	*0	0.00	*0.00	0	0.00	0.00	0.00	0	0.0	0.00	0.00	\$0.000	
500184 TACO PIE WITH BEANS	SERVINGS	0	0	0.00	0	*N/A*	0.00	*N/A*	0	0.00	0.00	0.00	0	0.0	0.00	0.00	\$0.000	
000151 CHICKEN NUGGETS w/WW ROLL	Serving (5each)	0	0	0.00	0	*0	0.00	*N/A*	0	0.00	0.00	0.00	0	0.0	0.00	0.00	\$0.000	
900021 SALAD,SPINACH: no dressing	CUP	222	11	0.04	11	*1	0.25	0.00	0	1.94	0.61	0.76	1332	12.9	7.68	0.29	\$0.054	
000139 SALAD,TOSSED: no dressing	CUP	222	12	0.04	8	*1	0.25	0.00	0	2.10	0.66	0.75	952	10.2	5.31	0.22	\$0.054	
500094 CREAMY COLE SLAW	1/4 CUP	0	0	0.00	0	*N/A*	0.00	*N/A*	0	0.00	0.00	0.00	0	0.0	0.00	0.00	\$0.000	
900012 BAKED BEANS (VEGETARIAN):veg	SERVINGS	0	0	0.00	0	*0	0.00	*0.00	0	0.00	0.00	0.00	0	0.0	0.00	0.00	\$0.000	
000150 BROCCOLI: fresh, steamed	CUP	0	0	0.00	0	0	0.00	0.00	0	0.00	0.00	0.00	0	0.0	0.00	0.00	\$0.000	
000146 CARROTS, BABY, RAW	Bag (1/2 c)	340	11	0.01	24	1	0.04	0.00	0	2.58	0.91	0.20	4318	10.0	0.81	0.28	\$0.072	

## Planned - Portion

Planned Menu Spreadsheet																	Heartland School Solutions	
Portion Values																	Aug 1, 2019 thru Sep 11, 2019	
<b>Menu Name:</b>	Elementary Lunch-Traditional										<b>Include Cost:</b>	Yes						
<b>Site:</b>	All Sites										<b>Report Style:</b>	Detailed						
<b>Tuesday - 08/20/2019</b>																	<b>Reimbursable Meal Total 760</b>	
	Portion Size	Reimb Qty	Cals' (kcal)	S-Fat' (g)	Sodm' (mg)	Sugars (g)	T-Fat (g)	Tr-Fat <sup>2</sup> (g)	Cholst (mg)	Carb (g)	Fiber (g)	Protn (g)	Vit-A (IU)	Calcm (mg)	Vit-C (mg)	Iron (mg)	Cost	
900000 HAMBURGER ON A BUN:WW	SERVING	0	295	5.45	251	*0	15.30	*0.73	58	18.97	1.62	19.88	12	53.1	0.00	3.46	\$0.487	
900015 LASAGNA WITH GROUND BEEF	SERVINGS	760	282	5.59	332	*1	10.25	*0.25	39	27.88	2.64	18.68	849	301.7	9.43	2.97	\$0.151	
000193 Chicken Patty On Bun	Each	0	322	2.56	602	*3	13.45	0.01	20	32.84	2.40	16.88	45	93.4	0.55	3.00	\$0.333	
500405 CAJUN SAUSAGE/TURKEY JAMBALAYA	3/4 CUP	0	292	2.65	704	*N/A*	10.65	*N/A*	90	23.74	0.92	23.50	101	96.2	7.30	2.98	\$0.011	
000162 HOT DOG ON A BUN:turkey hot	SERVING	0	208	2.62	675	*1	11.25	0.45	44	16.42	0.76	9.34	0	123.3	0.00	1.73	\$41.667	
500316 SPANISH CHICKPEA STEW	CUP	0	241	1.09	156	*16	7.90	*0.00	0	37.92	5.62	7.80	3325	93.4	6.53	2.23	\$0.000	
500184 TACO PIE WITH BEANS	SERVINGS	0	137	1.49	497	*N/A*	3.36	*N/A*	5	19.80	2.47	7.08	376	133.7	2.80	1.87	\$0.000	

## Offered - Weighted

Offered Menu Spreadsheet																	Heartland School Solutions	
Weighted Values																	Aug 1, 2019 thru Sep 11, 2019	
<b>Menu Name:</b>	Elementary Lunch-Traditional										<b>Include Cost:</b>	Yes						
<b>Site:</b>	All Sites										<b>Report Style:</b>	Detailed						
<b>Tuesday - 08/20/2019</b>																	<b>Reimbursable Meal Total 760</b>	
	Portion Size	Reimb Qty	Cals <sup>1</sup> (kcal)	S-Fat <sup>1</sup> (g)	Sodm <sup>1</sup> (mg)	Sugars (g)	T-Fat (g)	Tr-Fat <sup>2</sup> (g)	Cholst (mg)	Carb (g)	Fiber (g)	Protn (g)	Vit-A (IU)	Calc <sup>m</sup> (mg)	Vit-C (mg)	Iron (mg)	Cost	
900000 HAMBURGER ON A BUN:WW	SERVING	0	0	0.00	0	*0	0.00	*0.00	0	0.00	0.00	0.00	0	0.0	0.00	0.00	\$0.000	
900015 LASAGNA WITH GROUND BEEF	SERVINGS	760	282	5.59	332	*1	10.25	*0.25	39	27.88	2.64	18.68	849	301.7	9.43	2.97	\$0.151	
000193 Chicken Patty On Bun	Each	0	0	0.00	0	*0	0.00	0.00	0	0.00	0.00	0.00	0	0.0	0.00	0.00	\$0.000	
500405 CAJUN SAUSAGE/TURKEY JAMBALAYA	3/4 CUP	0	0	0.00	0	*N/A*	0.00	*N/A*	0	0.00	0.00	0.00	0	0.0	0.00	0.00	\$0.000	
000162 HOT DOG ON A BUN:turkey hot	SERVING	0	0	0.00	0	*0	0.00	0.00	0	0.00	0.00	0.00	0	0.0	0.00	0.00	\$0.000	
500316 SPANISH CHICKPEA STEW	CUP	0	0	0.00	0	*0	0.00	*0.00	0	0.00	0.00	0.00	0	0.0	0.00	0.00	\$0.000	
500184 TACO PIE WITH BEANS	SERVINGS	0	0	0.00	0	*N/A*	0.00	*N/A*	0	0.00	0.00	0.00	0	0.0	0.00	0.00	\$0.000	

## Offered - Portion

Offered Menu Spreadsheet																	Heartland School Solutions	
Portion Values																	Aug 1, 2019 thru Sep 11, 2019	
<b>Menu Name:</b>	Elementary Lunch-Traditional										<b>Include Cost:</b>	Yes						
<b>Site:</b>	All Sites										<b>Report Style:</b>	Detailed						
<b>Tuesday - 08/20/2019</b>																	<b>Reimbursable Meal Total 760</b>	
	Portion Size	Reimb Qty	Cals <sup>1</sup> (kcal)	S-Fat <sup>1</sup> (g)	Sodm <sup>1</sup> (mg)	Sugars (g)	T-Fat (g)	Tr-Fat <sup>2</sup> (g)	Cholst (mg)	Carb (g)	Fiber (g)	Protn (g)	Vit-A (IU)	Calc <sup>m</sup> (mg)	Vit-C (mg)	Iron (mg)	Cost	
900000 HAMBURGER ON A BUN:WW	SERVING	0	295	5.45	251	*0	15.30	*0.73	58	18.97	1.62	19.88	12	53.1	0.00	3.46	\$0.487	
900015 LASAGNA WITH GROUND BEEF	SERVINGS	760	282	5.59	332	*1	10.25	*0.25	39	27.88	2.64	18.68	849	301.7	9.43	2.97	\$0.151	
000193 Chicken Patty On Bun	Each	0	322	2.56	602	*3	13.45	0.01	20	32.84	2.40	16.88	45	93.4	0.55	3.00	\$0.333	
500405 CAJUN SAUSAGE/TURKEY JAMBALAYA	3/4 CUP	0	292	2.65	704	*N/A*	10.65	*N/A*	90	23.74	0.92	23.50	101	96.2	7.30	2.98	\$0.011	
000162 HOT DOG ON A BUN:turkey hot	SERVING	0	208	2.62	675	*1	11.25	0.45	44	16.42	0.76	9.34	0	123.3	0.00	1.73	\$41.667	
500316 SPANISH CHICKPEA STEW	CUP	0	241	1.09	156	*16	7.90	*0.00	0	37.92	5.62	7.80	3325	93.4	6.53	2.23	\$0.000	
500184 TACO PIE WITH BEANS	SERVINGS	0	137	1.49	497	*N/A*	3.36	*N/A*	5	19.80	2.47	7.08	376	133.7	2.80	1.87	\$0.000	

## Served - Weighted

Served Menu Spreadsheet																	Heartland School Solutions	
Weighted Values																	Aug 1, 2019 thru Sep 11, 2019	
<b>Menu Name:</b>	Elementary Lunch-Traditional										<b>Include Cost:</b>	Yes						
<b>Site:</b>	All Sites										<b>Report Style:</b>	Detailed						
<b>Tuesday - 08/20/2019</b>																	<b>Reimbursable Meal Total 1</b>	
	Portion Size	Reimb Qty	Cals <sup>1</sup> (kcal)	S-Fat <sup>1</sup> (g)	Sodm <sup>1</sup> (mg)	Sugars (g)	T-Fat (g)	Tr-Fat <sup>2</sup> (g)	Cholest (mg)	Carb (g)	Fiber (g)	Protn (g)	Vit-A (IU)	Calcm (mg)	Vit-C (mg)	Iron (mg)	Cost	
900000 HAMBURGER ON A BUN:WW	SERVING	0	0	0.00	0	*0	0.00	*0.00	0	0.00	0.00	0.00	0	0.0	0.00	0.00	\$0.000	
900015 LASAGNA WITH GROUND BEEF	SERVINGS	0	0	0.00	0	*0	0.00	*0.00	0	0.00	0.00	0.00	0	0.0	0.00	0.00	\$0.000	
000193 Chicken Patty On Bun	Each	0	0	0.00	0	*0	0.00	0.00	0	0.00	0.00	0.00	0	0.0	0.00	0.00	\$0.000	
500405 CAJUN SAUSAGE/TURKEY JAMBALAYA	3/4 CUP	0	0	0.00	0	*N/A*	0.00	*N/A*	0	0.00	0.00	0.00	0	0.0	0.00	0.00	\$0.000	
000162 HOT DOG ON A BUN:turkey hot	SERVING	0	0	0.00	0	*0	0.00	0.00	0	0.00	0.00	0.00	0	0.0	0.00	0.00	\$0.000	
500316 SPANISH CHICKPEA STEW	CUP	0	0	0.00	0	*0	0.00	*0.00	0	0.00	0.00	0.00	0	0.0	0.00	0.00	\$0.000	
500184 TACO PIE WITH BEANS	SERVINGS	0	0	0.00	0	*N/A*	0.00	*N/A*	0	0.00	0.00	0.00	0	0.0	0.00	0.00	\$0.000	

## Served - Portion

Served Menu Spreadsheet																	Heartland School Solutions	
Portion Values																	Aug 1, 2019 thru Sep 11, 2019	
<b>Menu Name:</b>	Elementary Lunch-Traditional										<b>Include Cost:</b>	Yes						
<b>Site:</b>	All Sites										<b>Report Style:</b>	Detailed						
<b>Tuesday - 08/20/2019</b>																	<b>Reimbursable Meal Total 1</b>	
	Portion Size	Reimb Qty	Cals <sup>1</sup> (kcal)	S-Fat <sup>1</sup> (g)	Sodm <sup>1</sup> (mg)	Sugars (g)	T-Fat (g)	Tr-Fat <sup>2</sup> (g)	Cholest (mg)	Carb (g)	Fiber (g)	Protn (g)	Vit-A (IU)	Calcm (mg)	Vit-C (mg)	Iron (mg)	Cost	
900000 HAMBURGER ON A BUN:WW	SERVING	0	295	5.45	251	*0	15.30	*0.73	58	18.97	1.62	19.88	12	53.1	0.00	3.46	\$0.487	
900015 LASAGNA WITH GROUND BEEF	SERVINGS	0	282	5.59	332	*1	10.25	*0.25	39	27.88	2.64	18.68	849	301.7	9.43	2.97	\$0.151	
000193 Chicken Patty On Bun	Each	0	322	2.56	602	*3	13.45	0.01	20	32.84	2.40	16.88	45	93.4	0.55	3.00	\$0.333	
500405 CAJUN SAUSAGE/TURKEY JAMBALAYA	3/4 CUP	0	292	2.65	704	*N/A*	10.65	*N/A*	90	23.74	0.92	23.50	101	96.2	7.30	2.98	\$0.011	
000162 HOT DOG ON A BUN:turkey hot	SERVING	0	208	2.62	675	*1	11.25	0.45	44	16.42	0.76	9.34	0	123.3	0.00	1.73	\$41.667	
500316 SPANISH CHICKPEA STEW	CUP	0	241	1.09	156	*16	7.90	*0.00	0	37.92	5.62	7.80	3325	93.4	6.53	2.23	\$0.000	
500184 TACO PIE WITH BEANS	SERVINGS	0	137	1.49	497	*N/A*	3.36	*N/A*	5	19.80	2.47	7.08	376	133.7	2.80	1.87	\$0.000	

## Base - Weighted

Base Menu Spreadsheet																	Heartland School Solutions	
Weighted Values																	Aug 1, 2019 thru Sep 11, 2019	
Menu Name: Elementary Lunch-Traditional										Include Cost: Yes								
Site:										Report Style: Detailed								
<b>Tuesday - 08/20/2019</b>																	<b>Reimbursable Meal Total 800</b>	
	Portion Size	Reimb Qty	Cals <sup>1</sup> (kcal)	S-Fat <sup>1</sup> (g)	Sodm <sup>1</sup> (mg)	Sugars (g)	T-Fat (g)	Tr-Fat <sup>2</sup> (g)	Cholst (mg)	Carb (g)	Fiber (g)	Protn (g)	Vit-A (IU)	Calcm (mg)	Vit-C (mg)	Iron (mg)	Cost	
900000 HAMBURGER ON A BUN:WW	SERVING	0	0	0.00	0	*0	0.00	*0.00	0	0.00	0.00	0.00	0	0.0	0.00	0.00	\$0.000	
900015 LASAGNA WITH GROUND BEEF	SERVINGS	600	212	4.19	249	*1	7.69	*0.19	29	20.91	1.98	14.01	637	226.2	7.07	2.22	\$0.113	
000193 Chicken Patty On Bun	Each	0	0	0.00	0	*0	0.00	0.00	0	0.00	0.00	0.00	0	0.0	0.00	0.00	\$0.000	
500405 CAJUN SAUSAGE/TURKEY JAMBALAYA	3/4 CUP	0	0	0.00	0	*N/A*	0.00	*N/A*	0	0.00	0.00	0.00	0	0.0	0.00	0.00	\$0.000	
000162 HOT DOG ON A BUN:turkey hot	SERVING	0	0	0.00	0	*0	0.00	0.00	0	0.00	0.00	0.00	0	0.0	0.00	0.00	\$0.000	
500316 SPANISH CHICKPEA STEW	CUP	0	0	0.00	0	*0	0.00	*0.00	0	0.00	0.00	0.00	0	0.0	0.00	0.00	\$0.000	
500184 TACO PIE WITH BEANS	SERVINGS	0	0	0.00	0	*N/A*	0.00	*N/A*	0	0.00	0.00	0.00	0	0.0	0.00	0.00	\$0.000	

## Base - Portion

Base Menu Spreadsheet																	Heartland School Solutions	
Portion Values																	Aug 1, 2019 thru Sep 11, 2019	
Menu Name: Elementary Lunch-Traditional										Include Cost: Yes								
Site:										Report Style: Detailed								
<b>Tuesday - 08/20/2019</b>																	<b>Reimbursable Meal Total 800</b>	
	Portion Size	Reimb Qty	Cals <sup>1</sup> (kcal)	S-Fat <sup>1</sup> (g)	Sodm <sup>1</sup> (mg)	Sugars (g)	T-Fat (g)	Tr-Fat <sup>2</sup> (g)	Cholst (mg)	Carb (g)	Fiber (g)	Protn (g)	Vit-A (IU)	Calcm (mg)	Vit-C (mg)	Iron (mg)	Cost	
900000 HAMBURGER ON A BUN:WW	SERVING	0	295	5.45	251	*0	15.30	*0.73	58	18.97	1.62	19.88	12	53.1	0.00	3.46	\$0.487	
900015 LASAGNA WITH GROUND BEEF	SERVINGS	600	282	5.59	332	*1	10.25	*0.25	39	27.88	2.64	18.68	849	301.7	9.43	2.97	\$0.151	
000193 Chicken Patty On Bun	Each	0	322	2.56	602	*3	13.45	0.01	20	32.84	2.40	16.88	45	93.4	0.55	3.00	\$0.333	
500405 CAJUN SAUSAGE/TURKEY JAMBALAYA	3/4 CUP	0	292	2.65	704	*N/A*	10.65	*N/A*	90	23.74	0.92	23.50	101	96.2	7.30	2.98	\$0.011	
000162 HOT DOG ON A BUN:turkey hot	SERVING	0	208	2.62	675	*1	11.25	0.45	44	16.42	0.76	9.34	0	123.3	0.00	1.73	\$41.667	
500316 SPANISH CHICKPEA STEW	CUP	0	241	1.09	156	*16	7.90	*0.00	0	37.92	5.62	7.80	3325	93.4	6.53	2.23	\$0.000	
500184 TACO PIE WITH BEANS	SERVINGS	0	137	1.49	497	*N/A*	3.36	*N/A*	5	19.80	2.47	7.08	376	133.7	2.80	1.87	\$0.000	



## Production Planning Recap

The Production Planning Recap report generates a production planning list based on menu, site, and date range. This report can be used to check meal numbers to make sure that the menu plans are remaining compliant with nutritional requirements. The Production Planning Recap report has three Report Types: Planned vs. Served, Planned vs. Offered, and Offered vs. Served. Each of these types compares the first type of production number (such as Planned) with the second type (such as Served) to show the difference between them.

To run a Production Planning Recap report, first select a date range. Then you must select a menu name and at least one production site or site group. Select one of the Report Types and choose whether to exclude a la carte and zero quantities.

You may also choose to Combine Menu Items. If this option is set to **No**, menu items will be listed separately for each site selected for the report. If this option is set to **Yes**, the report will take all of the serving data for each menu item and combine them to show serving data for all selected sites/site groups at once.

Using the Display Type drop-down, you can export this report to a PDF file, a Word document, or an Excel spreadsheet.

Production Planning - Recap Report												Heartland School Solutions	
Planned vs Served												2/1/20 - 8/3/20	
Menu Name: Elementary Lunch-Traditional			Site Group: All Sites										
Combine Menu Items: Yes													
Recipe #	Recipe Name	Portion	Planned			Served			Difference		Short/Leftover	Waste	
			Reimb	AlaCr	Total	Reimb	AlaCr	Total	Qty	%			
900000	HAMBURGER ON A BUN:WW	SERVING	25	10	35	0	9	9	-26	-74.3%	N/A	N/A	
900015	LASAGNA WITH GROUND BEEF	SERVING S	8125	0	8125	0	0	0	-8125	-100%	N/A	N/A	
000193	Chicken Patty On Bun	Each	7550	0	7550	115	0	115	-7435	-98.5%	N/A	N/A	
990080	CAJUN SAUSAGE/TURKEY JAMBALAYA	3/4 CUP	4480	0	4480	0	0	0	-4480	-100%	N/A	N/A	
000162	HOT DOG ON A BUN:turkey hot	SERVING	2600	0	2600	0	0	0	-2600	-100%	N/A	N/A	
990082	SPANISH CHICKPEA STEW	CUP	1200	0	1200	0	0	0	-1200	-100%	N/A	N/A	
990078	TACO PIE WITH BEANS	SERVING S	600	0	600	0	0	0	-600	-100%	N/A	N/A	
000151	CHICKEN NUGGETS w/WW ROLL	Serving (5each)	2600	0	2600	0	0	0	-2600	-100%	N/A	N/A	
900021	SALAD,SPINACH: no dressing	CUP	5658	5	5663	10	5	15	-5648	-99.7%	N/A	N/A	
000139	SALAD,TOSSED: no dressing	CUP	5658	5	5663	10	5	15	-5648	-99.7%	N/A	N/A	
990065	CREAMY COLE SLAW	1/4 CUP	3440	0	3440	10	0	10	-3430	-99.7%	N/A	N/A	
900012	BAKED BEANS (VEGETARIAN):veg	SERVING S	3800	0	3800	50	0	50	-3750	-98.7%	N/A	N/A	
000150	BROCCOLI: fresh, steamed	CUP	2600	0	2600	0	0	0	-2600	-100%	N/A	N/A	
000146	CARROTS, BABY, RAW	Bag (1/2 c)	7790	0	7790	50	0	50	-7740	-99.4%	N/A	N/A	
000189	CORN: canned, yellow:1/2 c	1/2 CUP	2040	0	2040	0	0	0	-2040	-100%	N/A	N/A	
000487	FRENCH FRIES: oven heat	2.5 OZ	7300	10	7310	115	9	124	-7186	-98.3%	N/A	N/A	
900011	GREEN BEANS: canned,cooked	CUP	12580	0	12580	0	0	0	-12580	-100%	N/A	N/A	
000439	PEAS & CARROTS: frozen,boiled	CUP	3600	0	3600	50	0	50	-3550	-98.6%	N/A	N/A	
000064	APPLES,Fresh	EACH	8624	0	8624	10	0	10	-8614	-99.9%	N/A	N/A	
900014	BANANAS	EACH	5270	0	5270	10	0	10	-5260	-99.8%	N/A	N/A	
000088	PEACHES,FRESH	EACH	1100	0	1100	10	0	10	-1090	-99.1%	N/A	N/A	
900008	PEARS,FRESH	EACH	2040	0	2040	0	0	0	-2040	-100%	N/A	N/A	
000437	PEACHES: cnd,light syrup:1/2 c	1/2 CUP	400	0	400	0	0	0	-400	-100%	N/A	N/A	

## Production Planning Shopping List

The Production Planning Shopping List allows the user to generate a shopping list based on numbers entered into production quantities. This will make day-to-day duties run more smoothly and be more cost effective, as well as save time.

You only need to enter one date range to run a Production Planning Shopping List, but entering in multiple date ranges will show amounts needed for different dates, reducing the need to run multiple reports. These dates will each have their own column.

After entering date ranges, select one or more menu names, one or more sites or site groups, and select how you would like to display the list. When you have entered your parameters, click **View** to generate the report.

**Note:** Any products with linked ingredients will have their vendor product number shown in the “Mfr/Vendor Prod #” column.

Heartland School Solutions								
Production Planning - Shopping List								
2-Elementary Lunch-Traditional								
5-Adams, 8-Ham, 7-Lin, 1-T-Jeff								
Vendor	Price	Mfr / Vendor Prod #	02/01/2018 Thu 02/26/2018	01/01/2018 Thu 01/31/2018	Total Requirement 01/01/2018 thru 02/28/2018			
<b>Beef</b>								
23567		BEEF,GROUND,85% LN MEAT / 15% FAT,RAW	Syco	19.9900	5842	9 1/8	10 1/2	19 3/4 Case (4 Chubs)
<b>Beverages</b>								
9400		APPLE JUC,CND OR BTLD,UNSWTND,W/ VIT C				7	41	48 LB
9135		GRAPE JUC,CND OR BTLD,UNSWTND,W/ VIT C				7	42	49 LB
9207		ORANGE JUC,CND,UNSWTND				7	41 1/4	48 LB
9273		PINEAPPLE JUC,CND,UNSWTND,W/ VIT C				7	41 1/2	48 1/4 LB
14429		WATER,MUNICIPAL				156 3/4	337	493 3/4 LB
<b>Bread and cereal recipes</b>								
2		ROLLS, HAMBURGER WW	Syco	18.0000	8765	15	15 3/4	30 3/4 CASE 6/BAGS
<b>Breakfast Cereals</b>								
8065		CEREALS RTE,RICE KRISPIES					4 3/4	4 3/4 LB
<b>Condiments: catsup, mustard, relish</b>								
799960		BEANS, CANNED, GARBANZO (CHICKPEAS), LOW-SODI					19 1/2	19 1/2 LB
<b>Dairy: butter, cheese, eggs, milk, yogurt</b>								
799911		CHEESE BLEND, AMERICAN AND SKIM MILK CHEESES			US Foods-12345	1 1/8	1 3/4	3 Case
90339		CHEESE, MOZZARELLA, LITE, FROZEN, SHREDDED				47	78	125 LB
1124		EGG,WHITE,RAW,FRESH					20	20 LB
1123		EGG,WHOLE,RAW,FRESH				4	8 1/2	12 1/4 LB
902428		MILK,CHOC,FLUID,COMM,FAT FREE			91682	33	40	72 Case 50 ct
1085		MILK,NONFAT,FLUID,W/ VIT A (FAT FREE OR SKIM)			91684	20	72 1/4	92 1/4 Case 50ct
1182		USDA COMMODITY,CHS,CHEDDAR,RED FAT				2	2 1/2	2 1/2 LB
902446		Yogurt, Cup, Choc, Fren Well's Dairy 328017				17 1/4	192 1/2	209 3/4 LB
<b>Fats and oils: margarine, shortening, mayonna</b>								
799915		MARGARINE REG,HARD,SOYBN (HYDROJCTNSD				3 3/4	22 1/4	26 LB
50385		OIL,VEGETABLE					10 1/4	10 1/4 LB
4053		OIL,OLIVE,SALAD OR COOKING					1 3/4	1 3/4 LB
4689		SALAD DRNGNG,MAYO,LT,SMART BALANCE,OMEGA PLUS				3 1/2	10 3/4	14 1/4 LB
4549		SHORTENING INDUSTRIAL,LARD&VEG OIL				3 3/4	8	11 3/4 LB
902236		SHORTENING,VEG,TYPE I-COMMOD				3/4	3/4	1 1/2 Box

## Production Records

Production records are reports that you can customize to have all of the information you would want on a given report. Production record reports can be useful for audit requirements and it can save quite a bit of time by allowing you to run one report for multiple needs.

**Note:** Before you can generate production records, make sure that you have set up your production record format under Production Record Formats in the **Setup** menu.

Once you have created a Production Record Format, select it in the Format Name drop-down. Note that when generating a production record, multiple Menu Names and Production Sites can be selected on the same report.

You have the option to combine or split menu items in recipes on a Production Record. By default, Production Records combine menu items. To split recipes by menu, under the Combine Menu Items filter, select **No**.

Use the drop-down menu to select your Display Type (*Excel (Tabbed) by date*, *Excel (Non-Tabbed)*, *PDF*, *Word*). When you have selected your settings, click **View** to generate the report.

Once generated, the Production Record will appear, and print, with the title "Production Report."

The screenshot shows a web application interface for generating Production Records. At the top, there is a breadcrumb trail: Home > Reports > Menu Planning > Menu Planning Production Records. The main heading is "Production Records". Below this, there are several configuration fields:

- Format Name:** A dropdown menu.
- Menu Name: (4 max):** Two selected items: "Elementary Brkfst-Traditional" and "Elementary Lunch-Traditional", each with a close button (X).
- Production Sites:** Two selected items: "T Jefferson Elementary" and "George Washington Elementary", each with a close button (X).
- Start Date:** A date field set to "6/13/2019" with a calendar icon.
- End Date:** A date field set to "6/13/2019" with a calendar icon.
- Use Production Specification:** A dropdown menu set to "Yes".
- Combine Menu Items:** A dropdown menu set to "Yes".
- Display Type:** A dropdown menu set to "PDF".

At the bottom right, there is a blue "View" button and a print icon.

## Production Summary

The Production Summary report allows the user to generate a production summary list based on planned, offered, and served menu plan production quantities. This is useful for checking numbers to remain in compliance with meal standards.

To generate a Production Summary report, enter a date range (the default date range is a week from the current date), select a menu, and select one or more sites that will be included, or select **ALL** to show every available site on the report. Under Report Type, select **Planned**, **Offered**, or **Served** depending on what production information you would like to see. You may also choose to exclude a la carte quantities or quantities equal to zero.

Under Display Type, select **PDF** to display the report in a new tab as a PDF, **Excel** to export the report to a spreadsheet, or **Word** to export the report to a text document. Click **View** to generate the report.

Production Summary List										MOSAIC
Planned Quantities										7/2/15 - 6/8/17
Menu Name: 6 HHFKA Lunch K-5					Sites: 1-GEO WA, 2-SBAELE, 3-CLINTO					
<b>Mon - 11/2/15</b>										
Recipe #	Recipe Name	Portion	Total	1-GEO WA	2-SBAELE	3-CLINTO				
000126	1000	serv	1	1						
000122	100	serv	2	2						
<b>Tue - 11/3/15</b>										
Recipe #	Recipe Name	Portion	Total	1-GEO WA	2-SBAELE	3-CLINTO				
000126	1000	scr	1	1						
000122	100	serv	2	2						
<b>Wed - 11/4/15</b>										
Recipe #	Recipe Name	Portion	Total	1-GEO WA	2-SBAELE	3-CLINTO				
000126	1000	serv	1	1						
000122	100	serv	2	2						
<b>Thu - 11/5/15</b>										
Recipe #	Recipe Name	Portion	Total	1-GEO WA	2-SBAELE	3-CLINTO				
000126	1000	serv	1	1						
000122	100	serv	2	2						
MOSAIC BOH 2.6.0.5735										
Page 1 of 12										
6/1/17 12:18 PM										



## Weekly Requirements

The Weekly Requirements report analyzes meal component contributions offered in a selected menu cycle and compares them with the Healthy Hunger-Free Kids Act meal requirements for 5-day school weeks. It can also be used to check weeks outside the standard 5-day length by selecting **Special Week** under Report Style and selecting the specific days in the special week. This report is used to ensure that meals on menu plan cycles are eligible for reimbursement.

### Weekly Requirements

Menu Name: 2. Elementary Lunch-Traditional

Report Style: Standard 5 Day Week

**5 Days Selected**

Standard 5 Day Week (Mon-Fri):

January 2020

Su	Mo	Tu	We	Th	Fr	Sa
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

Display Type: PDF

[View](#)

<b>Heartland School Solutions</b>															
<b>Weekly Certification Worksheet</b>															
2. Elementary Lunch-Traditional					Lunch K-5 (age 5-10)					Week of 1/6/2020					
5 Day Week	Mon 01/06/20	Tue 01/07/20	Wed 01/08/20	Thu 01/09/20	Fri 01/10/20			Weekly Total	Weekly Rqmt.	Weekly Rqmt. Check	Weekly Fruit Juice Limit Check (no more than half of Total Fruit)	Total Weekly Fruit	Total Weekly Fruit Juice	% of Total Weekly Fruit that is Juice	Weekly Rqmt. Check
Fruit: Minimum (cups)	0.5	0.5	0.5	0.5	0.5			2.5	2.5	Yes		3	0.25	8.33%	Yes
Vegetables: Minimum (cups)	1.25	1.25	1.5	2.125	2			8.125	3.75	Yes	Weekly Veg. Juice Limit Check (no more than half of Total Veg.)	Total Weekly Veg.	Total Weekly Veg. Juice	% of Total Weekly Veg. that is Juice	Weekly Rqmt. Check
-Dark Green	1	1	0	1	1.5			4.5	0.5	Yes					
-Red/Orange	0.375	0.25	0.75	0.375	0.625			2.375	0.75	Yes					
-Beans & Peas (Legumes)	0	0	0	0	0.125			0.125	0.5	NO					
-Starchy	0	0	1.5	0	0			1.5	0.5	Yes					
-Other	1	1	0.125	1	0.125			3.25	0.5	Yes					
								9.5	0	0%	Yes				
Meat/Meat Alt: Minimum (oz eq)	2	2	2	2	2			10	8	Yes					
Meat/Meat Alt: Maximum (oz eq)	2	2	2	2	2			10	10	Yes					
Grain: Minimum (oz eq)	1.25	2	0	1.25	1			5.5	8	NO					
Grain: Maximum (oz eq)	1.75	3	2	2	1.5			10.25	9	OVER					
Grain Based Dessert Total for all weekly meals								0	No more than 2 oz	Yes					
Whole Grain Rich Weekly Amount	Weekly Grains Total	17.75	Weekly Whole Grain Rich Total	16.75	% of Whole Grain Rich	94.37%			50% Whole Grain Rich	Yes					
	Mon 01/06/20	Tue 01/07/20	Wed 01/08/20	Thu 01/09/20	Fri 01/10/20			Weekly Total	Weekly Rqmt.	Weekly Rqmt. Check					
Milk: Minimum (cups)	1	1	1	1	1			5	5	Yes					
Variety: Skim/Fat-free unflavored, Skim/fat-free flavored, Low-fat(1% or less) unflavored, Low-fat(1% or less), flavored	Yes	Yes	Yes	Yes	Yes										
Reduced fat(2%) or whole, unflavored and flavored															

\*\* Cells with this background color signify Requirements not being met!

## Ordering

Click on the report name in the table to be redirected to the specific report in the manual.

<a href="#">Consolidated Order Report</a>	<a href="#">Purchase Order Report</a>
	<a href="#">Additional Ways to Access Purchase Order Reports</a>

## Consolidated Order Report

The Consolidated Order report shows a consolidated list of all of the products ordered for each vendor. It includes order quantities, price, order total for the selected site/site groups, and approval and delivery date range.

You may add additional filter criteria (Entered By, Vendor, Requisition #, Status, a Primary Sort Order and a Secondary Sort Order). You may generate a Summary or Detail report. A detailed report includes sites and quantities ordered by sites. Under Display Type, Summary reports may only display as PDF or Word files, while Detail reports may only display as Excel files.

Consolidated Vendor Orders							Heartland School Solutions
<b>Approval Date Range:</b>		All Dates		<b>Delivery Date Range:</b>		All Dates	
<b>Vendor:</b>		TEST Vendor		<b>Primary Sort Order:</b>		Site	
<b>Secondary Sort Order:</b>		Vendor Product #					
<hr/>							
<b>Vendor</b>	TEST Vendor						
	585 Latona Rd.						
	Rochester, NY 44616						
<b>Phone</b>	585-555-5555						
<b>Fax</b>	555-555-5555						
<b>Email</b>	patrick.clemens@e-hps.com						
<hr/>							
Product #							
Vendor	District	Description	Quantity	Unit	Unit Price	Total Price	
23456	02-001	ROLLS, HAMBURGER WW	63	CASE 6/BAGS	\$15.3600	\$967.6800	
sugar-104	19335-001	SUGARS, GRANULATED	1	Bag 50#	\$6.5100	\$6.5100	
33491	1082-001	MILK, LOWFAT, 1%	5	Case 50ct	\$12.9800	\$64.9000	
34567	03-001	CORN, CANNED YELLOW	4	CASE 6 / #10 CAN	\$15.0000	\$60.0000	
sysco-123	11124-001	CARROTS, RAW	1	Case 4/5# Bags	\$13.5600	\$13.5600	
<b>Total:</b>						<b>\$1112.6500</b>	
<hr/>							
Order Summary							
Delivery Date	Site	Order Number	Status	Total Amount			
7/26/2017	5 Adams Elementary	42	Approved	\$544.1100			
7/28/2017	5 Adams Elementary	46	Received	\$184.3200			
7/28/2017	5 Adams Elementary	47	Received	\$230.4000			
7/18/2017	4 Central Kitchen	41	Saved	\$94.9000			
7/25/2017	2 George Washington Elementary	43	Saved	\$30.3600			
9/11/2017	2 George Washington Elementary	45	Received	\$13.5600			
10/31/2017	2 George Washington Elementary	44	Approved	\$15.0000			
<b>Total of All Orders:</b>						<b>\$1112.6500</b>	

## Purchase Order Report

The Purchase Order report allows you to generate a purchase order to send to the vendor. There are multiple methods to generate the report: the Vendor Ordering screen, the Order Edit Screen, as well as the Report section.

You may filter this report by site, site group, vendor, and order number. You may also restrict the report to certain date ranges for when the purchase orders were approved and delivered.

**MOSAIC**  
**Purchase Order**

**Vendor** Vendor  
123 Main Street  
Anywhere, NY 11212  
**Phone** 585-555-1212 Ext: 1212  
**Fax** 585-555-1000  
**Email** vendor@email.com

**Ship to** GEORGE WASHINGTON  
ELEMENTARY  
  
585-555-7474

**Approved Date:** 9/28/2018  
**Order #:** 4  
**Customer #:** 558541

**Delivery Date**  
9/30/2016

Product #		Vendor	District	Description	Brand	Qty	Unit	Unit Price	Line Price
		334	1111-001	Napkins	Kleenex	2	case(10)	\$25.00	\$50.00
		55858	4038-001	Safety Gloves		15	each	\$25.50	\$382.50
		345334	11785-001	GOURD, DISHCLOTH (TOWELGOURD), CKD, BLD, DRND, W/S	Towels	5	12	\$15.00	\$75.00
<b>Total</b>									<b>\$507.50</b>

**Vendor Instructions:**  
Please provide two copies of the invoice with each delivery.

**Delivery Instructions:**  
Please deliver to receiving bay #2 and ring the doorbell.

\_\_\_\_\_  
*Authorized By*                      *Date*

## Additional Ways to Access Purchase Order Reports

The Purchase Order report allows you to generate a purchase order to send to the vendor. There are multiple methods to generate the report, from the Vendor Ordering screen, Order Edit Screen, as well as the Report section.

### Vendor Orders Search Screen - View Report

Perform the following procedure to generate a Purchase Order report from using the quick link on the Vendor Ordering Search screen.

1. From the left-hand navigation bar, click **Ordering**.
2. Click **Vendor Orders**.
3. Click **View Report**.

4. Select your search criteria.  
**Note:** The filters can be left blank to print all orders in the search results.
5. Click **View**.

### Vendor Orders Edit Screen - View Report

Perform the following procedure to generate a Purchase Order report from using the quick link on the Vendor Orders Edit screen. The Purchase Order Report is only available for orders with a status of Approved or Received, and will only create a report for the selected order.

1. From the left-hand navigation bar, click **Ordering**.
2. Click **Vendor Orders**.
3. Click the appropriate Order # hyperlink.  
**Note:** The Purchase Order Report is only available for orders with a status of Approved or Received.
4. Click **View Report**.

Product #	Description	Brand	Vendor Product #	Purchase Unit Description	Order Qty	Purchase Unit Price	Total
1002-001	Beef Pattie, Broiled	Advance	765	Case135ct/2-4oz patt	4	25.58	102.32
10169-001	Del Monte Beans	Del Monte	548	Case 6/#10 can	10	31.54	315.40

## Products

Click on the report name in the table to be redirected to the specific report in the manual.

<a href="#">Price Lists Report</a>	<a href="#">Product Notes Report</a>
<a href="#">Product List Report</a>	

## Price Lists Report

The Price Lists report provides consolidated lists of vendor-negotiated product prices and their effective date ranges. The report will only include price lists whose effective date ranges are within the selected start and end dates. The report can be filtered by Price List # or Description, Start and End Date, and Price List Status. The report can be ordered by Price list # or Description.

Price Lists Report				Heartland School Solutions		
				All Dates		
Status:	In Use	Group By:	Vendor			
Order By:	Price List #					
<b>Sysco</b>				Effective Date Range: 7/1/16 - 9/14/18		
Price List # 1 : Sysco				Status: In Use		
Product #	Description	Brand	Vendor Product #	Quantity per Purchase Unit	Commodity Processing Fee	Price per Purchase Unit
02-001	ROLLS, HAMBURGER WW	SARAH LEE	87765	6 BAG 30 COUNT per CASE 6/BAGS		18.0000
03-001	CORN, CANNED YELLOW	LIBBY	98756	6 #10 CAN per CASE 6 / #10 CAN		12.5400
1042-001	CHEESE,PAST PROCESS,AMERICAN,W/DI NA PO4	Land O Lakes	42334	4 Carton (160 slices) per Case 4 cartons		10.3600
1082-001	MILK,LOWFAT,1%	Hiland	33491	50 Carton per Case 50ct		10.6500
1085-001	MILK,NONFAT,FLUID,SKIM	Hiland	54561	50 Carton per Case 50ct		15.9900
11124-001	CARROTS,RAW----VERY LONG DISCRPTION IN THIS FIEL	ABC	sysco-123	4 Bag 5# per Case 4/5# Bags		10.2300
11124-002	CARROTS,RAW----VERY LONG DISCRPTION IN THIS FIEL	ABC-Shredded	sysco-Raw234	4 Bag 5# per Case 4/5#		10.6300
11960-2-001	CARROTS,BABY,RAW: Individual Pkg	ABC	3456	144 Pkg (70g) per Case 144ct		11.2300
11960-2-001	CARROTS,BABY,RAW: Individual Pkg	ABC	99727	144 Pkg (70g) per Case 144ct		5.6600
1234-001	banana	dole	banana	10 Bunch per case		4.6300
18069-001	BREAD,WHITE	XYZ	321	24 Slice per Loaf (24ct)		6.9900
18967-001	BREAD,WHEAT	XYZ	breadwheat23	24 Slice per Loaf (24ct)		8.9600
19334-001	SUGAR,BROWN	Imperial	sugar-102	1 Bag 25# per Bag 25#		1.9900
19335-001	SUGARS,GRANULATED	Imperial	sugar-104	1 Bag 50# per Bag 50#		1.9800
19336-001	SUGARS,POWDERED	Imperial	sugar-103	1 Bag 25# per Bag 25#		1.9700
2345-001	HOTDOG ROLLS/BUNS,PLAIN	Wonder	wonder-0921	20 loaf per case		8.7900
23567-001	BEEF,GROUND,85% LN MEAT / 15% FAT,RAW	Archer	5842	4 Chub (10#) per Case (4 Chubs)		19.9900
27001-001	NAPKINS	RKO	221444	10 Pkg (300ct) per Case (10pkg)		4.6600

## Product List Report

The Product List report provides a summary of information about the products and items in the Mosaic Ordering and Inventory system. This report can assist when trying to determine if there are any necessary updates, and displays the current state in which products are in the system. There are several filters that can be used to customize the report results.

Product List						Heartland School District		
Hamilton Elementary								
<b>Usage Category:</b> Purchased Food				<b>Active:</b> Yes				
<b>Report Type:</b> Summary				<b>Order By:</b> Description				
Product #	Description	Brand	Product Category	Usage Category	Storage Category	Quantity per Purchase Unit	Active	Needs Attention
118524-001	100% WHOLE WHEAT BAGEL	Whole Wheat Bagel	Main Dishes	Purchased Food	Cooler Main	50 Each per case (50)	Yes	No
118527-001	100% WHOLE WHEAT BAGEL	Bread	Pasta/Grains	Purchased Food		20 each per Case	Yes	Yes
102476-001	1000 ISLAND DRESSING	Ken's--TEST	Farm Fresh	Purchased Food	Cooler Main	20 Each per Case (20)	Yes	No
102476-002	1000 ISLAND DRESSING	generic Brand Dressing	Farm Fresh	Purchased Food	Cooler Main	24 Each per CASE (24/16oz)	Yes	No
102476-003	1000 ISLAND DRESSING	Kens-Bulk	Farm Fresh	Purchased Food	Cooler Main	60 per bottle per CS(60)	Yes	No
120044-001	16" HARVEST 51% WHOLE GRAIN ROLLED EDGE CHEES	Whole Grains of America	Pasta/Grains	Purchased Food		20 EACH per Bag	Yes	Yes
14057-001	ALCOHOLIC BEV,WINE,DSSRT ,SWT	After School Party	Beverages	Purchased Food	Kitchen	3 t per 2	Yes	No
3435-001	Almond Joy	Almond Joy	Chips, cookies, pretzels	Purchased Food	Warehouse	20 EACH per CS	Yes	No
3302-S-001	Almond Milk	Silk	XDairy, Fres	Purchased Food	Cooler Main	24 EA(8oz) per CASE	Yes	No
118470-001	American Cheese Roll	SGT Pizza rolls	Milk, cheese, yogurt	Purchased Food	Cooler Main	60 EA(5.30oz) per CS(60/5.30oz)	Yes	Yes
2002-001	ANISE SEED	ANISE SEED	spices	Purchased Food	Stockroom Main	1 EACH per CS (12/8oz)	Yes	No
1579-001	Apple Juice	MOTTS	Fruits	Purchased Food	Cooler Main	70 EACH per CS (70)	Yes	No
</36022-001	APPLEBEE'S,CRUNCHY ONION RINGS	Onion Rings	Fats and Oils	Purchased Food	Kitchen	50 Bag per Box (50)	Yes	No
23423-001	Avocado	Avocado	Vegetables	Purchased Food	Cooler Main	1 EA per CS(50)	Yes	Yes
355612-001	Beef	Upstate farms	Fresh Meat	Purchased Food	Cooler Main	50 PKG 5# per CS (6/5#)	Yes	Yes
355612-002	Beef	Federal Government	Fresh Meat	Purchased Food	Cooler Main	6 PKG 5# per CS (6/5#)	Yes	No
119036-001	Beef Gravy base	McCormick	Fats and Oils	Purchased Food	Stockroom Main	1 20 per Box (20/8oz)	Yes	No
118889-001	BEEF PATTY	Beef Patty	Fresh Meat	Purchased Food	Cooler Main	4 EA(17.5#) per CS(4/17.5#)	Yes	No
Bread01-001	Bread	Advance	Pasta/Grains	Purchased Food	Cooler Main	144 EACH 1.5oz per CS(144/1.5oz)	Yes	No
Bread01-002	Bread	Wheat Bread	Pasta/Grains	Purchased Food	Cooler Main	12 EA per Case	Yes	No



## Product Notes Report

The Product Notes report provides a list of notes that have been entered for your products. The report can be filtered by product number and description, categories, active status, note start and end dates, and needs attention. You also have the option to order the report by product number or product description.

<b>Product Notes</b>				Heartland School District
				All Dates
<b>Active :</b>	Yes	<b>Order By :</b>	Product Description	
<b>Animal Crackers: 119289-001</b>				
Note #	Date	User	Note	Needs Attention
1	1/19/2016 3:24:18 PM	Gloria@heartland	Don't order these in the month of August	No
<b>Apple Jacks Individual Box: 119096-001</b>				
Note #	Date	User	Note	Needs Attention
1	1/5/2016 8:47:33 AM	Gloria@heartland	Order every month	No
<b>ARCHWAY Home Style Cookies, Dutch Cocoa: 18528-001</b>				
Note #	Date	User	Note	Needs Attention
1	12/10/2015 7:17:18 AM	Gloria@heartland	Order Before 12/13/15	Yes
<b>Avocado: 23423-001</b>				
Note #	Date	User	Note	Needs Attention
1	12/4/2015 8:11:58 AM	Gloria@heartland	Only order this item when it's in season	Yes
<b>BREAD, WHOLE-WHEAT, COMMER PREP, TOASTED: 3456-001</b>				
Note #	Date	User	Note	Needs Attention
2	12/3/2015 3:44:15 PM	Gloria@heartland	Please order this on Monday's	No
1	12/3/2015 3:44:14 PM	Gloria@heartland	Please order this on Monday's	No
<b>Del Monte: 39005-001</b>				
Note #	Date	User	Note	Needs Attention
2	4/22/2016 11:02:14 AM	Gloria@heartland	Notify managers to update recipes.	No
1	4/22/2016 11:01:37 AM	Gloria@heartland	Product will be discontinued 6/30/16.	Yes

# REPORTS

## Recipes

Click on the report name in the table to be redirected to the specific report in the manual.

Allergen List	Recipe List/Print (con't)
<a href="#">Allergen List - By Recipe</a>	<a href="#">Detailed Recipe List</a>
<a href="#">Allergen List - By Allergen</a>	Nutrient Composition
<a href="#">Component List</a>	<a href="#">Nutrient Composition - Summary</a>
<a href="#">HACCP Instructions List</a>	<a href="#">Nutrient Composition - Detailed</a>
<a href="#">HACCP Process List</a>	<a href="#">Nutrient Source List</a>
Recipe List/Print	<a href="#">Recipes List by Menu</a>
<a href="#">Summary Recipe List</a>	<a href="#">Subgroup List</a>

## Allergen List

The Allergen List reports include information about allergens associated with recipes available in your menu planning database. It lists the recipes and provides the allergens associated with each in the list. This list helps to make sure that all recipes have been flagged with the appropriate allergens.

You can organize the list either by the district's default method, alphabetically, or numerically. This list can also be generated for inactive recipes and for specific menus.

### Allergen List - By Recipe

<b>MOSAIC</b>		
<b>Allergen List - By Recipe</b>		
<b>Recipe #</b>	<b>Recipe Name</b>	<b>Allergen(s)</b>
500404	CONFETTI VEGGIE SPAG SALAD	Milk, Wheat
500097	EGG SALAD SANDWICH	Egg, Wheat
370	EGG,HARD-BOILED	Egg
274	EGGPLANT: boiled	
500169	SCRAMBLED EGGS	Milk, Egg
500300	STIR FRY-RICE EGGS & HAM	Milk, Egg, Peanut, Soy

*NOTICE: The data contained within this report and the Mosaic™ Menu Planning and Nutritional Analysis software should not be used for and does not provide menu planning for a child with a medical condition or food allergy. Ingredients and menu items are subject to change or substitution without notice. Please consult a medical professional for assistance in planning or treating medical conditions.*

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Allergen List - By Allergen

**MOSAIC**

**Allergen List - By Allergen**

**Milk - This applies to any products containing lactose. This is because it may cause sickness in those who are lactose intolerant.**

Recipe #	Recipe Name
990016	ALMONDS, YOGURT, FRUIT LUNCH
500026	BROC CHEESE & RICE CASSEROLE
1122	CHEESE PIZZA
149	CHEESEBURGER ON A BUN
489	MILK - Variety
228	MILK,1% Chocolate
230	MILK,1% Lowfat
227	MILK,2% Chocolate
231	MILK,Skim
226	MILK,Whole
1119	PEPPERONI PIZZA
500192	TOASTED CHEESE SANDWICH
1054	TURKEY W/CHEESE SANDWICH

## Component List

The Recipe Component List includes nutrient information for meal components present in recipes. This list helps visualize what components are commonly being used and what ones are not.

You can organize the list either by the district's default method, alphabetically, or numerically. This list can also be generated for inactive recipes.

MOSAIC								
Recipe Component List								
Recipe #	Recipe Name	Portion Size	M/MA as Grain oz eq (Brkfst)	M/MA oz eq	Grains oz eq	Fruit cup	Veg cup	Milk cup
990006	ALMOND BROCCOLI SALAD W/TURKEY	1/2 CUP		0.000	0.000	0.000	0.000	0.000
990007	ALMOND CHERRY BREAD PUDDING	1 SQUARE		0.000	0.000	0.000	0.000	0.000
990008	ALMOND CHICKEN FAJITAS	EACH		0.000	0.000	0.000	0.000	0.000
990010	ALMOND CHICKEN PILAF	CUP		0.000	0.000	0.000	0.000	0.000
990011	ALMOND DATE BARS	EACH		0.000	0.000	0.000	0.000	0.000
990014	ALMOND PEACH MUFFIN	EACH		0.000	0.000	0.000	0.000	0.000
990015	ALMOND SNACK MIX	1/3 CUP		0.000	0.000	0.000	0.000	0.000
990016	ALMONDS, YOGURT, FRUIT LUNCH	SERVING		0.000	0.000	0.000	0.000	0.000
500047	APPLE COBBLER	SERVINGS		0.000	1.000	0.500	0.000	0.000
500001	APPLE CRISP	SERVINGS		0.000	0.000	0.000	0.000	0.000
63	APPLE JUICE:cnnd,unswtn,+vit C	4 fl.oz.		0.000	0.000	0.000	0.000	0.000
1108	APPLE SLICES	BAG		0.000	0.000	0.500	0.000	0.000
292	APPLE/CARROT/RAISIN/SALAD	1 3/4 CUPS		0.000	0.000	0.000	0.000	0.000
1123	APPLE: MEDIUM	EACH		0.000	0.000	0.500	0.000	0.000
500002	APPLE-HONEY CRISP	SERVINGS		0.000	0.000	0.000	0.000	0.000
64	APPLES,Fresh	EACH		0.000	0.000	0.000	0.000	0.000
500003	APPLESAUCE CAKE	SERVINGS		0.000	0.000	0.000	0.000	0.000
356	APPLESAUCE,SWEETENED	1 CUP		0.000	0.000	0.000	0.000	0.000
247	APPLESAUCE:cnnd,unswtn,+vit C	CUP		0.000	0.000	0.000	0.000	0.000
248	APRICOTS: canned,light syrup	CUP		0.000	0.000	0.000	0.000	0.000
500004	ARROZ CON QUESO	SERVINGS		0.000	0.000	0.000	0.000	0.000
250	ASPARAGUS: fresh,boiled	CUP		0.000	0.000	0.000	0.000	0.000
500305	AZTEC GRAIN SALAD	1 CUP		0.000	0.000	0.000	0.000	0.000

## HACCP Instructions List

The HACCP Instructions List is a list of instructions that are designed to keep your food preparation compliant with Hazard Analysis Critical Control Point (HACCP) food safety protocols. The HACCP Instructions List allows you to print a copy of these instructions so that they may be handed out to employees, posted in areas where employees can regularly see them, or otherwise used to make sure that HACCP procedures are known and being followed.

<b>MOSAIC HACCP Instructions</b>		
<b>HACCP</b>	<b>HACCP Description</b>	<b>Category</b>
Cooking Temperatures	<p>When cooking, make sure that foods are cooked to the proper temperature to prevent the spread of foodborne illness. Make sure that foodservice personnel know how to use and calibrate food thermometers. Refer to the following list for recommended internal temperatures for common foods:</p> <ul style="list-style-type: none"> <li>- Seafood, beef, and pork - 145 degrees F</li> <li>- Ground Beef, Ground Pork, or Ground Fish - 155 degrees F</li> <li>- Fish Sticks - 155 degrees F</li> <li>- Poultry - 165 degrees F</li> </ul> <p>For any recipe with a combination of meat products, cook to the highest recommended temperature.</p>	Preparation
Preventing Cross Contamination	<p>When preparing food, be careful not to cross contaminate foods with your knives. To prevent contamination, make sure not to use the same knife for different kinds of preparation. Use a separate knife for each of the types of food:</p> <ul style="list-style-type: none"> <li>- Raw meat</li> <li>- Raw fish/seafood</li> <li>- Raw poultry</li> <li>- Fruit/vegetables</li> </ul>	Health & Safety

## HACCP Process List

The HACCP Process List includes a list of HACCP processes associated with the Mosaic recipes that may be edited and printed so that the user can stay in compliance with HACCP guidelines.

You can organize the list either by the district's default method, alphabetically, or numerically. This list can also be generated for inactive recipes.

<b>MOSAIC HACCP Process List</b>				
<b><u>No HACCP Process</u></b>				
<b>Recipe #</b>	<b>Recipe Name</b>	<b>Group</b>	<b># of Portions</b>	<b>Portion Size</b>
990014	ALMOND PEACH MUFFIN	SNACKS	48	EACH
990015	ALMOND SNACK MIX	SNACKS	50	1/3 CUP
63	APPLE JUICE:cnnd,unswtn,+vit C	JUICE	1	4 fl.oz.
1108	APPLE SLICES	FRUIT	1	BAG
1123	APPLE: MEDIUM	FRUIT	1	EACH
356	APPLESAUCE,SWEETENED	FRUIT	1	1 CUP
247	APPLESAUCE:cnnd,unswtnd,+vit C	FRUIT	1	CUP
248	APRICOTS: canned,light syrup	FRUIT	1	CUP
250	ASPARAGUS: fresh,boiled	VEGETABLES	1	CUP
1111	BABY CARROTS	VEGETABLES	1	1/2 CUP
1081	BAGEL CINNAMON RAISIN:Secondar	BREAKFAST	1	EACH
251	BANANA SLICES	FRUIT	1	CUP
252	BEET GREENS: boiled	VEGETABLES	1	CUP

## Recipe List/Print

The Recipe List report allows you to list information about recipes by summary or by details. You have the choice of listing active recipes individually, by recipe number, by classification ID, or by source. You may also choose to include recipe photos or use production specifications instead of listing every ingredient.

This list can also be generated for inactive recipes.

Use the drop-down menu to select your Display Type (*CSV, Excel (Tabbed)* by recipe, *Excel (Non-Tabbed), PDF, Word*).

When you have selected your settings, click **View** to generate the report.

### Summary Recipe List

The Summary Recipe List includes the recipe name, included ingredients, and nutrient value per portion size.

Recipe Prep Sheet		Heartland School Solutions							
<b>133 - ALMONDS</b>									
Recipe HACCP Process:									
Source: TEST									
Number of Portions: 1									
Portion Size: oz									
Ingredient #	Ingredient Description	Measurements							
012061	ALMONDS	1 oz							
*Nutrients are based upon 1 Portion Size (oz)									
Calories*	164.144 kcal	Total Fat	14.155 g	Total Dietary Fiber	3.544 g	Vitamin C	0.000 mg	77.611% Calories from Total Fat	
Saturated Fat*	1.078 g	Trans Fat*	0.004 g	Protein	5.996 g	Iron	1.052 mg	5.910% Calories from Sat Fat	
Sodium*	0.283 mg	Cholesterol	0.000 mg	Vitamin A	0.567 IU	Water	1.250 g	0.024% Calories from Trans Fat	
Sugars	1.233 g	Carbohydrate	6.109 g	Calcium	76.260 mg	Ash	0.842 g	14.888% Calories from Carbohydrates	
Moisture Change	0.000 %	Fat Change	0.000 %	Portion Cost	\$0.125			14.612% Calories from Protein	
Type of Fat	-								
Components									
Meat/Meat ALT	1 oz eq	Grain	oz eq	Fruit	cup	Vegetable	cup	Milk	cup

### Detailed Recipe List

The Detail Recipe List includes all details about the listed recipes, which includes HACCP instructions for each ingredient. You have the choice of listing active recipes individually, by recipe number, by classification ID, or by source, and you can choose to include recipe photos or use production specifications instead of listing every ingredient. This list can also be generated for inactive recipes.

Use the drop-down menu to select your Display Type (*CSV, Excel (Tabbed)* by recipe, *Excel (Non-Tabbed), PDF, Word*).

When you have selected your settings, click **View** to generate the report.

Recipe Prep Sheet		Heartland School Solutions						
								
<b>990034 - BANANA CRANBERRY ALMOND MUFFIN</b>								
Recipe HACCP Process:								
Source:								
Number of Portions: 48								
Portion Size: EACH								
Ingredient #	Ingredient Name	Measurements				Instructions		
020081	WHEAT FLR,WHITE,ALL-PURPOSE,ENR,BLEACHED	1 qt + 1 1/4 CUP				1) Preheat oven to 325°F. Line muffin tins with paper cups; set aside 2) In small bowl, combine flour, baking powder and salt; set aside 3) In mixer bowl, cream butter and sugar together. Add bananas, milk, eggs, vanilla, and almond extract; mix well 4) Stir in flour mixture just until moist. Do not over beat 5) Stir in nuts and cranberries 6) Portion batter into lined muffin tins using No. 16 scoop 7) Bake at 325°F for 25 to 30 minutes		
018371	LEAVENING AGENTS,BAKING PDR,LOW-SODIUM	1 tbsp + 2 TSP						
002047	SALT,TABLE	1/4 EACH						
001001	BUTTER,WITH SALT	1 1/3 CUP						
019335	SUGARS,GRANULATED	2 2/3 CUP						
009040	BANANAS,RAW	8 medium (7" to 7-7/8")						
001085	MILK,NONFAT,FLUID,W/ VIT A (FAT FREE OR SKIM)	2/3 CUP						
001123	EGG,WHOLE,RAW,FRESH	5 medium						
002050	VANILLA EXTRACT	1 TBSP						
990377	Almond Extract	1 teaspoon						
012063	ALMONDS,DRY RSTD,WO/SALT	1 1/3 CUP,whole kernels						
990378	CRANBERRIES, WHOLE, SLICED DRIED-COMMODITY	1 qt						
*Nutrients are based upon 1 Portion Size (EACH)								
Calories*	220.865 kcal	Total Fat	7.738 g	Total Dietary Fiber	1.648 g	Vitamin C	1.711 mg	31.532% Calories from Total Fat
Saturated Fat*	3.577 g	Trans Fat*	*0.000* g	Protein	3.198 g	Iron	*1.039* mg	14.575% Calories from Sat Fat
Sodium*	61.722 mg	Cholesterol	30.653 mg	Vitamin A	201.640 IU	Water	24.238 g	*0.000%* Calories from Trans Fat
Sugars	*14.035* g	Carbohydrate	35.577 g	Calcium	*44.217* mg	Ash	0.829 g	64.432% Calories from Carbohydrates



## Nutrient Composition

The Nutrient Composition report allows you to list nutrition information about recipes by summary or by details. You can organize the report either by the district's default method, alphabetically, or numerically. This report can also be generated for inactive recipes.

Use the drop-down menu to select your Display Type (*Excel (Tabbed)* by recipe, *Excel (Non-Tabbed)*, *PDF*, *Word*). When you have selected your settings, click **View** to generate the report.

### Nutrient Composition - Summary

The Nutrient Composition - Summary report summarizes the nutritional information of all the ingredients included in a recipe. You can then review this data to ensure you are offering all the required nutrients in order for your meals to be considered reimbursable.

MOSAIC															
Recipe Nutrient Composition - Summary															
Recipe No. Recipe Name	Portion Size	Weight (g)	Cals <sup>1</sup> (kcal)	Saturated Fat <sup>1</sup> (g)	Sodium <sup>1</sup> (mg)	Sugars (g)	Total Fat (g)	Chol (mg)	Carbs (g)	Dietary Fiber (g)	Protein (g)	Vitamin A (IU)	Calcium (mg)	Vitamin C (mg)	Iron (mg)
990006 ALMOND BROCCOLI SALAD W/TURKEY	1/2 CUP	220	241.247	1.405 5.242%	220.013	*7.582* *12.571%*	7.189 26.819%	32.762	30.899 51.232%	5.201	16.244 26.933%	783.108	*118.580*	111.376	*2.353*
990007 ALMOND CHERRY BREAD PUDDING	1 SQUARE	56	182.396	0.635 3.131%	137.873	*17.170* *37.654%*	4.736 23.369%	29.069	26.915 59.025%	1.372	8.712 19.106%	330.933	*241.094*	2.423	*0.930*
990008 ALMOND CHICKEN FAJITAS	EACH	171	397.518	3.032 6.864%	565.186	*3.789* *3.813%*	12.898 29.202%	73.074	38.717 38.959%	2.340	30.185 30.373%	65.400	100.723	5.031	3.554
990010 ALMOND CHICKEN PILAF	CUP	164	230.608	1.597 6.233%	273.577	*1.533* *2.659%*	13.173 51.411%	28.418	15.601 27.061%	2.166	13.352 23.160%	1999.043	56.523	3.474	1.599
990011 ALMOND DATE BARS	EACH	16	82.454	1.117 12.193%	32.928	*5.336* *25.886%*	6.183 67.491%	0.000	6.908 33.510%	1.007	1.204 5.841%	0.453	15.055	0.016	0.321
990014 ALMOND PEACH MUFFIN	EACH	81	219.762	0.960 3.930%	43.347	*18.365* *33.427%*	7.565 30.980%	17.305	34.821 63.380%	1.519	4.121 7.501%	151.717	61.412	20.115	1.876
990015 ALMOND SNACK MIX	1/3 CUP	62	294.296	4.464 13.652%	44.693	*12.910* *17.547%*	15.425 47.172%	0.000	33.752 45.875%	3.598	7.533 10.239%	1181.154	76.969	0.000	1.097
990016 ALMONDS, YOGURT, FRUIT LUNCH	SERVING	188	308.770	2.097 6.111%	108.904	*6.642* *8.604%*	16.383 47.752%	5.670	31.884 41.305%	4.701	12.252 15.872%	67.293	273.533	1.876	1.465
500047 APPLE COBBLER	SERVINGS	210	298.200	2.961 8.937%	96.600	*N/A*	12.054 36.380%	0.000	47.460 63.662%	3.486	2.478 3.324%	52.500	12.600	0.210	1.260
500001 APPLE CRISP	SERVINGS	93	199.997	1.590 7.156%	112.995	*N/A*	7.970 35.866%	0.000	31.750 63.501%	2.297	1.944 3.888%	349.996	19.995	0.493	0.986
63 APPLE JUICE:cndd,unswtn,+vit C	4 fl.oz.	124	57.040	0.025 0.391%	4.960	11.929 83.654%	0.161 2.543%	0.000	14.012 98.261%	0.248	0.124 0.870%	1.240	9.920	47.740	0.149
1108 APPLE SLICES	BAG	57	29.002	0.023 0.714%	0.998	*N/A*	0.102 3.165%	0.000	7.830 107.993%	1.400	0.147 2.027%	30.998	2.999	2.603	0.068
292 APPLE/CARROT/RAISIN/SALAD	1 3/4 CUPS	366	262.281	0.128 0.441%	83.007	*47.021* *71.711%*	0.796 2.731%	0.000	68.061 103.798%	9.254	2.650 4.041%	18411.440	66.933	21.380	1.269
1123 APPLE: MEDIUM	EACH	182	95.004	0.055 0.521%	2.002	*N/A*	0.309 2.927%	0.000	25.134 105.823%	4.404	0.473 1.991%	98.007	10.993	8.408	0.218
500002 APPLE-HONEY CRISP	SERVINGS	93	193.998	1.590 7.378%	112.995	*N/A*	7.970 36.975%	0.000	30.476 62.838%	2.297	1.962 4.045%	349.996	20.999	0.595	1.004
64 APPLES,Fresh	EACH	138	71.760	0.041 0.519%	1.380	14.338 79.922%	0.235 2.942%	0.000	19.058 106.231%	3.312	0.359 2.001%	74.520	8.280	6.348	0.166
500003 APPLESAUCE CAKE	SERVINGS	60	217.998	2.130 8.794%	204.996	*N/A*	8.388 34.630%	33.996	33.180 60.881%	0.696	3.276 6.011%	85.998	91.998	0.396	1.146

\*N/A\* - denotes a nutrient that is either missing or incomplete for an individual ingredient  
 \* - denotes combined nutrient totals with either missing or incomplete nutrient data  
 \* - denotes required nutrient values

NOTICE: The data contained within this report and the Mosaic® Menu Planning and Nutritional Analysis software should not be used for and does not provide menu planning for a child with a medical condition or food allergy. Ingredients and menu items are subject to change or substitution without notice. Please consult a medical professional for assistance in planning for or treating medical conditions.

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## Nutrient Composition - Detailed

The Nutrient Composition - Detailed report provides more detailed nutritional information of all the ingredients included in a recipe than the Summary report. You can review this data to ensure you are offering all the required nutrients in order for your meals to be considered reimbursable, and you can also see which ingredients are contributing the nutrients present in the recipe.

<b>MOSAIC</b>											
<b>Recipe Nutrient Composition - Detailed</b>											
<b>990006 - ALMOND BROCCOLI SALAD W/TURKEY</b>						Source: ALMOND BOARD					
Number of Portions: 50.000						Group Code: ENTREES					
Size of Portion: 1/2 CUP											
*Nutrients are based upon 1 Portion Size (1/2 CUP)											
Ingredient	Quantity	Weight (g)	Calories <sup>1</sup> (kcal)	Sat Fat <sup>2</sup> (g)	Sodium <sup>1</sup> (mg)	Sugars (g)	Total Fat (g)	Trans Fat <sup>2</sup> (g)			
11090 BROCCOLI,RAW	17 1/2 qt, florets	123.20	41.888	0.037	40.656	2.094	0.456	*N/A*			
902220 SALAD DRSG,MAYO TYPE,RED CAL-COMMOD	2 1/2 cup	12.00	31.560	0.370	106.320	*N/A*	2.280	*N/A*			
1117 YOGURT,PLN,LOFAT,12 GRAMS PROT PER 8 OZ	3 3/4 CUP	18.38	11.576	0.184	12.863	1.294	0.285	*N/A*			
19335 SUGARS,GRANULATED	1 cup	4.03	15.604	0.000	0.040	4.024	0.000	*N/A*			
901062 ONIONS,RED,RAW	1 3/4 CUP, chopped + 2 tbsp, chopped	6.00	2.400	0.003	0.240	*N/A*	0.006	*N/A*			
141 BACON BITS, IMITATION	1/2 cup	1.12	4.800	0.000	30.400	*N/A*	0.160	0.000			
9299 RAISINS,SEEDED	5 CUP, packed	16.50	48.840	0.028	4.620	*N/A*	0.089	*N/A*			
12061 ALMONDS	1 3/4 CUP, slivered + 2 tbsp, slivered	4.05	23.288	0.151	0.041	0.170	2.002	0.000			
902320 TURKEY,DICED,CKD,FROZEN-COMMOD	3 3/4 LB	34.02	59.534	0.633	24.834	*N/A*	1.912	*N/A*			
900057 Almond Extract	1 oz	0.57	1.758	0.000	0.000	*N/A*	0.000	0.000			
<b>Totals</b>		220.00	241.247	1.405	220.013	*7.582*	7.189	*0.000*			
<b>% of Calories</b>				5.242%		*12.571%*	26.819%	*0.000%*			
Ingredient	Chol (mg)	Carbs (g)	Fiber (g)	Protein (g)	Vit-A (IU)	Calcium (mg)	Vit-C (mg)	Iron (mg)	Water (g)	Ash (g)	
11090 BROCCOLI,RAW	0.000	8.180	3.203	3.474	767.536	57.904	109.894	0.899	110.018	1.072	
902220 SALAD DRSG,MAYO TYPE,RED CAL-COMMOD	4.920	2.688	0.120	0.084	6.000	1.200	0.000	0.074	6.684	0.264	
1117 YOGURT,PLN,LOFAT,12 GRAMS PROT PER 8 OZ	1.103	1.294	0.000	0.965	9.371	33.626	0.147	0.015	15.632	0.200	
19335 SUGARS,GRANULATED	0.000	4.031	0.000	0.000	0.000	0.040	0.000	0.002	0.001	0.000	
901062 ONIONS,RED,RAW	0.000	0.560	0.102	0.066	0.120	1.380	0.444	0.013	5.347	0.021	
141 BACON BITS, IMITATION	0.000	0.320	0.160	0.480	0.000	0.000	0.000	0.115	0.000	0.000	
9299 RAISINS,SEEDED	0.000	12.948	1.122	0.416	0.000	4.620	0.891	0.427	2.734	0.312	
12061 ALMONDS	0.000	0.878	0.494	0.859	0.081	10.692	0.000	0.151	0.190	0.121	
902320 TURKEY,DICED,CKD,FROZEN-COMMOD	26.739	0.000	0.000	9.900	0.000	9.117	0.000	0.657	21.891	0.354	
900057 Almond Extract	0.000	0.000	0.000	0.000	0.000	*N/A*	0.000	*N/A*	0.000	0.000	
<b>Totals</b>		32.762	30.899	5.201	16.244	783.108	*118.580*	111.376	*2.353*	162.497	2.344
<b>% of Calories</b>			51.232%		26.933%						

\*N/A\* - denotes a nutrient that is either missing or incomplete for an individual ingredient  
 \* - denotes combined nutrient totals with either missing or incomplete nutrient data  
<sup>1</sup> - denotes required nutrient values  
<sup>2</sup> - Trans Fat value is provided for informational purposes only, not for monitoring purposes.

NOTICE: The data contained within this report and the Mosaic® Menu Planning and Nutritional Analysis software should not be used for and does not provide menu planning for a child with a medical condition or food allergy. Ingredients and menu items are subject to change or substitution without notice. Please consult a medical professional for assistance in planning for or treating medical conditions.

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## Nutrient Source List

The Nutrient Source List identifies menu items that meet specific nutrient values and creates a list of recipes that meet specified criteria. This can assist you when planning menus that meet all USDA nutritional guidelines.

To generate a list, enter criteria that you would like your menu items to meet and click View. You can sort for a specific recipe group and generate a list of active or inactive items.

Home > Reports > Recipe Nutrient Source List

### Recipe Nutrient Source List

Cost:  Carbohydrates:  Grams

Calories: at Least:  & Less than:  Fiber:  Grams

Sat Fat:  Grams Protein:  Grams

Sat Fat:  % of Cals Vitamin A:  IU

Sodium:  Mg Calcium:  Mg

Sugars:  10 Grams Vitamin C:  Mg

Total Fat:  Grams Iron:  Mg

Total Fat:  % of Cals Recipe Group:

Trans Fat:  Grams Active:

Cholesterol:  Grams Display Type:

### MOSAIC

#### Recipe Nutrient Source List

Recipe No. Recipe Name	Group	Portion Size	Cost	Cals* (kcal)	Saturated Fat* (g)	Sodium* (mg)	Sugars (g)	Total Fat (g)	Trans Fat* (g)	Chol (mg)	Carbs (g)	Dietary Fiber (g)	Protein (g)	Vitamin A (IU)	Calcium (mg)	Vitamin C (mg)	Iron (mg)
133 ALMONDS	SN	oz	\$0.125	163.010	1.057 5.836%	0.283	1.191 2.923%	14.010 77.351%	0.003	0.000	6.143 15.074%	3.459 14.762%	6.016 14.762%	0.567	74.943	0.000	1.055
500001 APPLE CRISP	DESSERT	SERVING GS	199.997	1.590 7.156%	112.995	"N/A" "N/A%"	7.970 35.866%	"N/A" "N/A%"	0.000	0.000	31.750 63.501%	2.297 3.888%	1.944 3.888%	349.996	19.995	0.493	0.986
190 APPLES, CANNED, Sliced	FRUIT	CUP	71.996	0.000 0.000%	10.004	"N/A" "N/A%"	0.000 0.000%	0.000	0.000	0.000	17.993 99.966%	1.991 0.000%	0.000 0.000%	0.000	0.000	2.394	2.873
147 APPLESAUCE: Proportioned 1/2 C	FRUIT	1/2 CUP	51.235	0.010 0.172%	2.440	"N/A" "N/A%"	0.122 2.143%	"N/A"	0.000	0.000	13.748 107.333%	1.342 1.616%	0.207 1.616%	35.376	4.880	25.861	0.281
900013 APPLESAUCE:cnnd,unswth G,+vit C	FRUIT	CUP	102.480	0.020 0.171%	4.880	"N/A" "N/A%"	0.244 2.143%	"N/A"	0.000	0.000	27.499 107.333%	2.684 1.620%	0.415 1.620%	70.760	9.760	51.728	0.561
321 BAGELS,CINNAMON- RAISIN	BRKFS	1 EACH	194.540	0.192 0.887%	244.240	4.246 8.730%	1.207 5.584%	"N/A"	0.000	0.000	39.192 80.584%	1.633 14.307%	6.988 14.307%	51.830	13.490	0.497	2.698
500005 BAKED BEANS (VEGETARIAN)	VEG	SERVING GS	158.992	0.160 0.908%	532.000	"N/A" "N/A%"	0.640 3.623%	"N/A"	0.000	0.000	35.984 90.530%	6.992 17.027%	6.768 17.027%	360.000	86.000	7.792	0.848
500011 BANANA BREAD SQUARES	BREAD	SERVING G	148.997	1.099 6.540%	129.998	"N/A" "N/A%"	4.306 26.008%	"N/A"	15.997	15.997	25.560 68.619%	0.797 6.470%	2.410 6.470%	45.000	37.997	1.397	0.898
900010 BARBECUED BEEF ON A ROLL-WW	SAND	SERVING GS	410.751	8.076 17.694%	829.661	"5.577" "6.405%"	19.869 43.535%	"0.000"	74.494	74.494	28.520 27.773%	2.221 27.599%	28.341 27.599%	247.987	53.807	2.906	4.384
500015 BARBECUED CHICKEN	ENT	SERVING GS	294.988	3.727 11.369%	475.992	"N/A" "N/A%"	13.427 40.965%	"N/A"	86.000	86.000	15.820 21.451%	0.493 36.945%	27.246 36.945%	492.000	26.999	5.090	1.595
500016 BEAN BURRITO	ENT	SERVING GS	287.998	3.523 11.008%	661.992	"N/A" "N/A%"	7.934 24.795%	"N/A"	12.996	12.996	40.014 55.575%	4.685 20.568%	14.809 20.568%	800.998	305.987	10.089	3.369
195 BEANS, CANNED, KIDNEY, LOW-SOD	VEG	cup	218.010	0.128 0.528%	280.013	"N/A" "N/A%"	0.870 3.593%	0.000	0.000	0.000	39.910 73.227%	16.410 24.659%	13.440 24.659%	0.000	62.003	2.790	3.226
900019 BEEF & BEAN BURRITO	ENT	EACH	273.332	3.458 11.385%	634.737	"0.297" "0.435%"	8.594 28.297%	"0.222"	20.956	20.956	31.318 45.831%	5.872 26.425%	18.058 26.425%	503.769	196.189	4.066	2.384
500020 BEEF BURRITO	ENT	EACH	272.997	5.751 18.960%	351.000	"N/A" "N/A%"	12.461 41.079%	"N/A"	42.998	42.998	21.330 31.253%	1.998 27.574%	18.919 27.574%	799.997	263.993	9.693	2.619
177 BEEF SMOTHERED STEAK	ENT	Serving	159.697	2.929 16.506%	477.640	"N/A" "N/A%"	8.350 47.057%	"N/A"	21.510	21.510	5.310 13.299%	1.338 40.825%	16.299 40.825%	156.539	63.960	0.000	1.829
500030 BEEF TACO	ENT	2 EACH	298.998	5.796 17.447%	252.987	"N/A" "N/A%"	16.360 49.245%	"N/A"	45.996	45.996	20.353 27.229%	2.995 24.419%	18.253 24.419%	599.993	199.988	8.195	2.429



## Recipes List by Menu

The Recipes List by Menu tool allows you to generate a Recipe Prep Sheet based on date ranges, menus, and sites. Based on the selected parameters, the list generates based on the Planned amounts present on the Production Quantities screen of the selected recipe. This is useful for gauging how much food will be needed on a large scale.

To generate a prep sheet using Recipes List by Menu, select a date range (the default is the coming week), a menu under Menu Names, and a site. Additionally, you may click **Show More** for options that can narrow the recipe list more, such as by Recipe Group or their Active status. Then, click **Search** to see a list of recipes based on the criteria.

Use the check boxes to select which recipes will appear in the list. Select a report type, either Summary or Detail, and how the report will be ordered. Use the drop-down menu to select your Display Type (*CSV*, *Excel (Tabbed)* by recipe, *Excel (Non-Tabbed)*, *PDF*, *Word*). When you have selected your settings, click **View** to generate the report.

### Recipe Search

[Show Less](#)

Start Date:

End Date:

Menu Names:

Include Photo:

Print Zero Quantity Items:

Description:

Recipe #:

Recipe Group:

Site Group:

Sites:

Report Type:

Order By:

Display Type:

Source:

Active:

<input checked="" type="checkbox"/> All	Recipe #	Description	Menu Name	Menu Date
<input checked="" type="checkbox"/>	500114	LASAGNA WITH GROUND BEEF	Elementary Lunch-Traditional	01/20/2017
<input checked="" type="checkbox"/>	73	ROLLS (YEAST):Frzn Dough	Elementary Lunch-Traditional	01/20/2017
<input checked="" type="checkbox"/>	11	TACO BURGER w/BEEF	Elementary Lunch-Traditional	01/20/2017
<input checked="" type="checkbox"/>	500114	LASAGNA WITH GROUND BEEF	Elementary Lunch-Traditional	01/16/2017

### Recipe Prep Sheet

MOSAIC  
1/1/17 - 2/14/17

---

**500114 - LASAGNA WITH GROUND BEEF**

Recipe HACCP Process: #1 No Cook  
 Source: USDA D-25  
 Total Number of Portions: 250  
 Portion Size: SERVINGS

Menu Date: 1/16/2017  
 Number of Portions: 250  
 Elementary Lunch-Traditional

8-Ham

Ingredient #	Ingredient Description	Measurements
023567	BEEF,GROUND,85% LN MEAT / 15% FAT,RAW	16 LB + 4 oz
011282	ONIONS,RAW	15 LB (chopped)
799903	GARLIC,GRANULATED	1/2 cup + 2 TBSP
002030	PEPPER,BLACK	1 TBSP + 2 tsp
002029	PARSLEY,DRIED	1 1/4 cup
799910	TOMATOES,RED,RIPE,CND,DICED,REG PK	2 1/2 gal + 1 1/4 CUP
011546	TOMATO PRODUCTS,CND,PASTE,WO/SALT	1 1/4 # 10 Can
014429	WATER,MUNICIPAL	3 3/4 gal
002003	SPICES,BASIL,DRIED	3/4 cup + 3 tbsp (ground)
799905	OREGANO LEAVES,DRIED	3/4 cup + 3 tbsp (ground)
002023	MARJORAM,DRIED	1/4 cup + 1 TBSP
799906	THYME LEAF,DRIED	1 tbsp + 2 tsp (ground)
799909	LASAGNA NOODLES,ENR,DRY	13 lb + 12 OZ
799911	CHEESE BLEND, AMERICAN AND SKIM MILK CHEESES	7 LB + 13 oz

## Subgroup List

The Recipe Subgroup List includes nutrient information for meal subgroups present in recipes. This list helps visualize what subgroups are present in your recipe offerings.

You can organize the list either by the district's default method, alphabetically, or numerically. You can select certain subgroups to display on the list, or can display all of them by clicking **Check All**. This list can also be generated for inactive recipes.

MOSAIC													
Recipe Subgroup List													
Recipe #	Recipe Name	Fruit Juice	Vegetable, Dark Green	Vegetable, Red Orange	Veg. Beans & Peas (Legumes)	Vegetable, Starchy	Vegetable, Juice	Vegetable, Other	Whole Grain Rich	Grain Based Dessert	Milk	Milk, Flavored	Milk, Type
6	APPLE COBBLER									0.25			
181	APPLE COBBLER w/RAISINS									0.25			
500001	APPLE CRISP									1			
166	APPLE CRISP:Test									1			
169	APPLE CRISP:USDA									1			
197	APPLE/PEAR CRISP									1			
321	BAGELS,CINNAMON-RAISIN								2				
500005	BAKED BEANS (VEGETARIAN)			0.125	0.5								
900012	BAKED BEANS (VEGETARIAN):veg			0.125	0.5								
900010	BARBECUED BEEF ON A ROLL:WW			0.125				0	1.5				
500016	BEAN BURRITO			0.125	0.125				1.6				
196	BEANS, CANNED, KIDNEY, LOW-SOD				1								
900019	BEEF & BEAN BURRITO				0.125				1				
500020	BEEF BURRITO								1				
138	BEEF FAJITAS			0.063		0.063			1				
500030	BEEF TACO			0.125				0.125	0.75				
500032	BEEF TACO PIE			0.25					1.25				
45	BEEF TACO POTATO					0.5							
134	BEEF TACO, SOFT SHELL			0.125				0.125	0.9				
500033	BEEF TAMALES			0.375					0.75				
164	BLUEBERRY COBBLER									1			
170	BLUEBERRY CRISP									1			
168	BLOOM SANDWICH												

## Setup

Click on the report name in the table to be redirected to the specific report in the manual.

<a href="#">Vendor List</a>
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## Vendor List

The Vendor List allows you to print a list of all vendors. This allows for viewing of vendor data as it appears in Mosaic.

The report can be ordered by vendor name or vendor abbreviation and includes address, phone, and email information that you have entered in the system. This list can also be generated for inactive vendors.

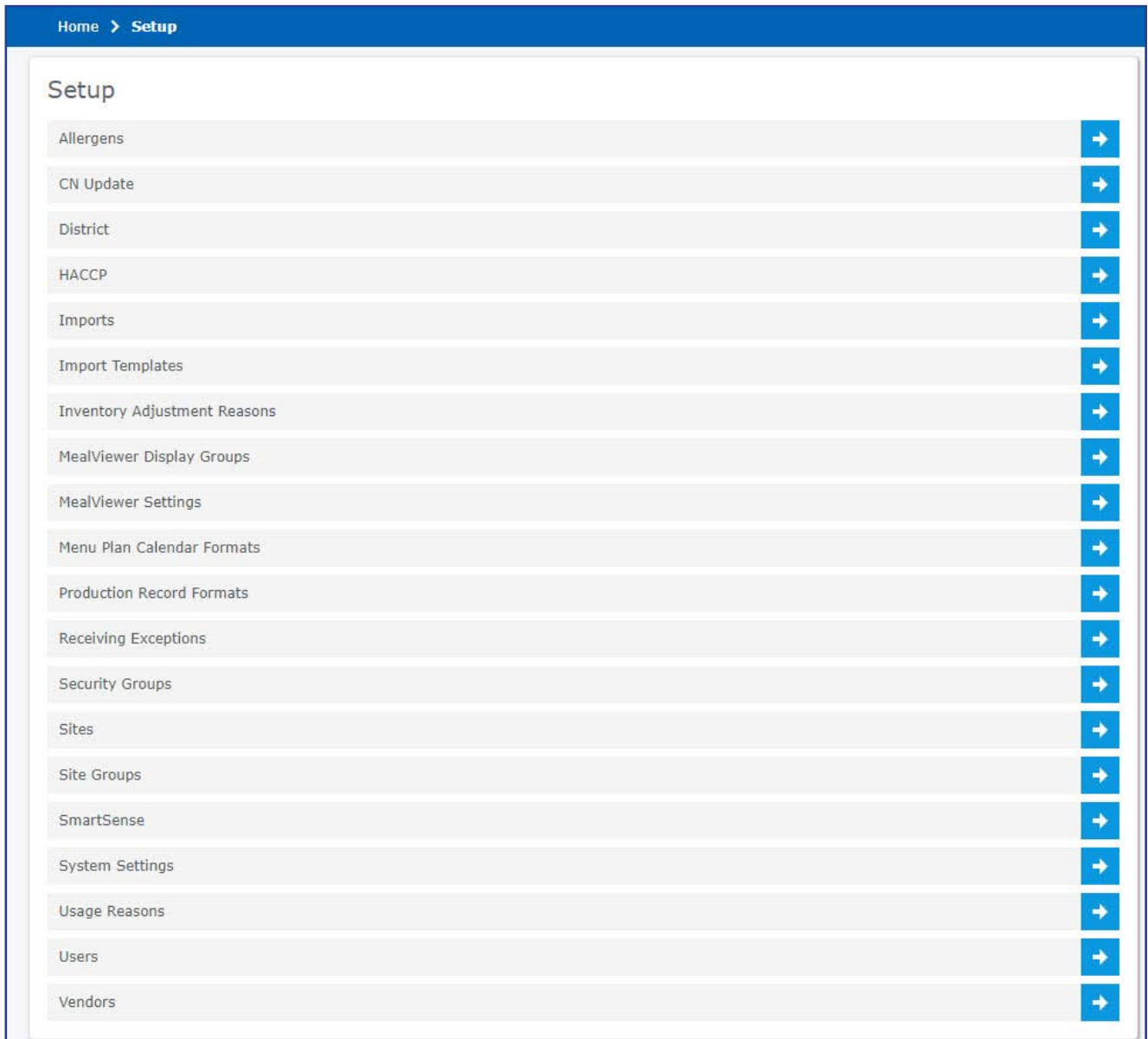
Vendor List										Heartland School District
Order By:	Vendor Name			Active:	Yes					
Vendor Abbr.	Vendor Name	Street Address	City	State	Zip Code	Country	Office Phone	Fax Number	Email	Active
4IMPR	4IMPRINT									Yes
A&R	A&R Wholesale	789 Elmgrove Rd 789-1 Elmgrove Building 2	Rochester	MP	14620	United States			test@test.cm	Yes
BRAUN	Braun Beef	0983 Miller St	Good City	AR		United States	678-091-9883 Ext.12			Yes
BR Company	Bread Company	3456 Lincoln Rd P.O.Box 339	Mexico City	NM	34511	United States	671-321-0099 Ext.9		bread@man.com	Yes
FoodLink	Food Link	1 food link drive	Rochester	MN		United States				Yes
FORM	Form Plastics	2356 Cat Ave 4539F---ST	Rochester	NY	45678962		585323342353 Ext.232132	4234324	test@test.com	Yes
Pepsi	Pepsi Cola	1234 Green way	Rochester	NY	14563	United States	585-783-1234 Ext.12	585-783-1234	pepsi@cola.com	Yes
Milk	Upstate Milk	789-1 Elmgrove Rd P.O. BOX2	Rochester	NY			585-000-0003 Ext.32345	585-000-0013	VendorRep@usmilk.com	Yes
US FO	US Foods									Yes
USDA	USDA/Pomona									Yes
VND	Vendor	123 Main Street	Anywhere	NY	11212	United States	585-555-1212 Ext.1212	585-555-1000	vendor@email.com	Yes
WHOLE	Whole Foods									Yes

# SETUP

## Setup Overview

In this section, you will learn how to use the functions listed under Setup, including managing users, sites, site groups, allergens, district information, HACCP settings, and customizing Production Record Formats and security groups. Access to the menu options vary based on your assigned permissions.

**Note:** The Import and Import Templates features (which allow for importing Price Lists, Products, Ingredients, and Inventory Linking) are currently only unavailable for Menu Planning users by contacting Support.

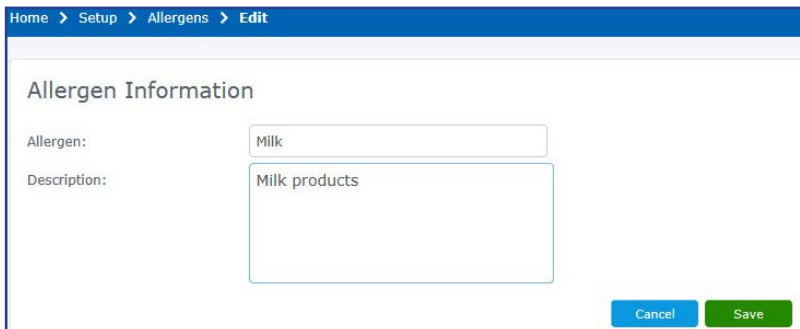


## Allergens

You can add, edit, deactivate, activate and delete allergens for Mosaic Menu Planning within Setup. Refer to the following procedures for instructions to manage allergens.

### Add Allergens

1. From the left-hand navigation bar, click **Setup**.
2. Click **Allergens**.
3. Click **Add**.
4. Type the Allergen information:
  - a. Allergen, for example Milk, Peanut, Soy
  - b. Description
5. Click **Save**.

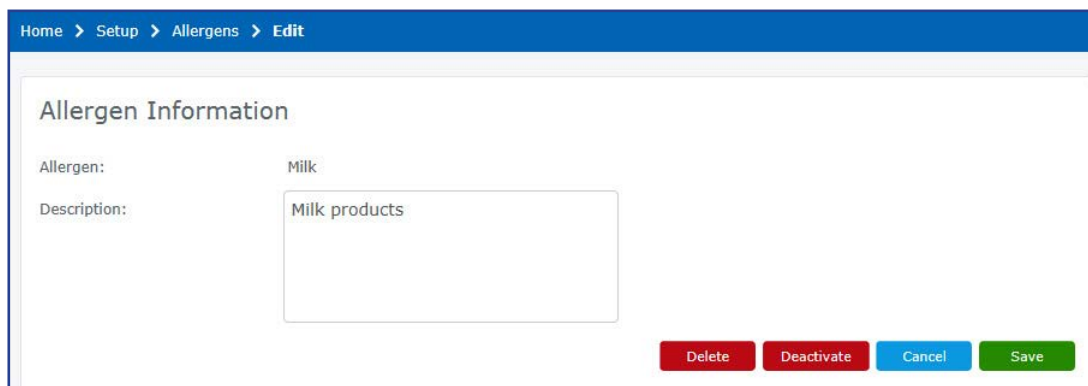


The screenshot shows a web browser window with the breadcrumb path 'Home > Setup > Allergens > Edit'. The main heading is 'Allergen Information'. There are two input fields: 'Allergen:' with the text 'Milk' and 'Description:' with the text 'Milk products'. At the bottom right, there are two buttons: 'Cancel' (blue) and 'Save' (green).

6. Repeat steps 1 - 5 until all allergens have been added.

### Modify Allergen

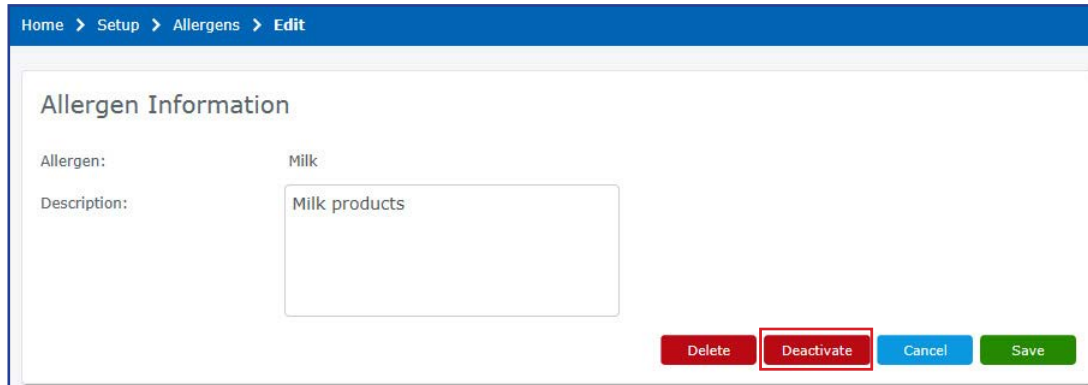
1. From the left-hand navigation bar, click **Setup**.
2. Click **Allergens**.
3. Enter an allergen name to find a specific allergen or leave the field blank for all sites.
4. Select **Yes** from the Active drop-down.
5. Click Search.
6. Click the **allergen** hyperlink, or double-click the allergen description.
7. Type a description.
8. Click **Save**.



The screenshot shows a web browser window with the breadcrumb path 'Home > Setup > Allergens > Edit'. The main heading is 'Allergen Information'. There are two input fields: 'Allergen:' with the text 'Milk' and 'Description:' with the text 'Milk products'. At the bottom right, there are four buttons: 'Delete' (red), 'Deactivate' (red), 'Cancel' (blue), and 'Save' (green).

## Deactivate Allergen

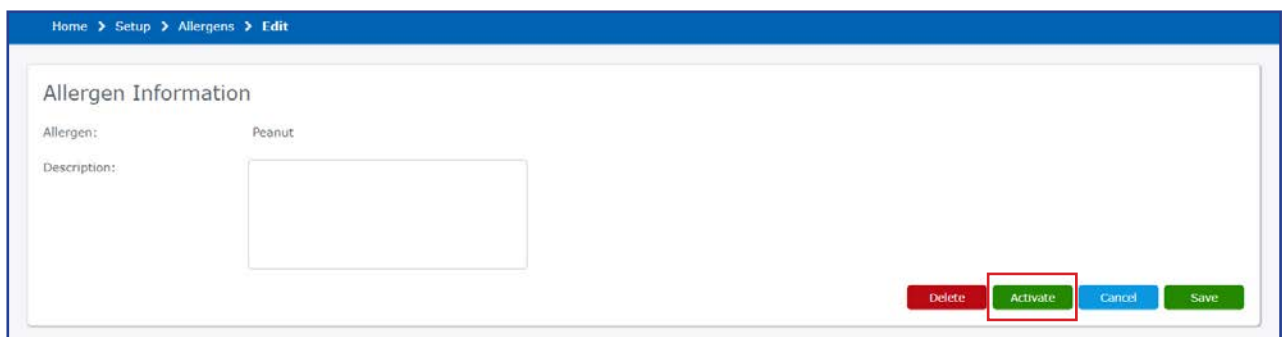
1. From the left-hand navigation bar, click **Setup**.
2. Click **Allergens**.
3. Enter an allergen name or leave the field blank for all allergens.
4. Click **Search**.
5. Click the **Allergen** hyperlink, or double-click the description to open.
6. Click **Deactivate**.



The screenshot shows a web application interface for editing an allergen. The breadcrumb navigation at the top reads "Home > Setup > Allergens > Edit". The main content area is titled "Allergen Information" and contains two fields: "Allergen:" with the value "Milk" and "Description:" with the value "Milk products". At the bottom right of the form, there are four buttons: "Delete" (red), "Deactivate" (red and highlighted with a red box), "Cancel" (blue), and "Save" (green).

## Activate Allergen

1. From the left-hand navigation bar, click **Setup**.
2. Click **Allergens**.
3. Enter an allergen name or leave the field blank for all allergens. Make sure that the **Active** drop-down field is set either to **No** or **[blank]**. It is set to "Yes" by default, which excludes deactivated allergens.
4. Click **Search**.
5. Click the **Allergen** hyperlink, or double-click the description to open.
6. Click **Activate**.

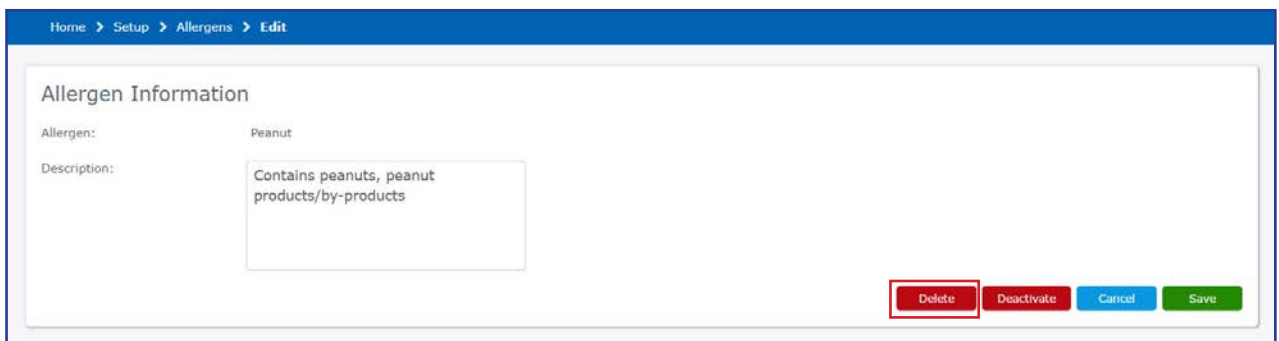


The screenshot shows a web application interface for editing an allergen. The breadcrumb navigation at the top reads "Home > Setup > Allergens > Edit". The main content area is titled "Allergen Information" and contains two fields: "Allergen:" with the value "Peanut" and "Description:" with an empty text box. At the bottom right of the form, there are four buttons: "Delete" (red), "Activate" (green and highlighted with a red box), "Cancel" (blue), and "Save" (green).

## Delete/Reassign Allergen

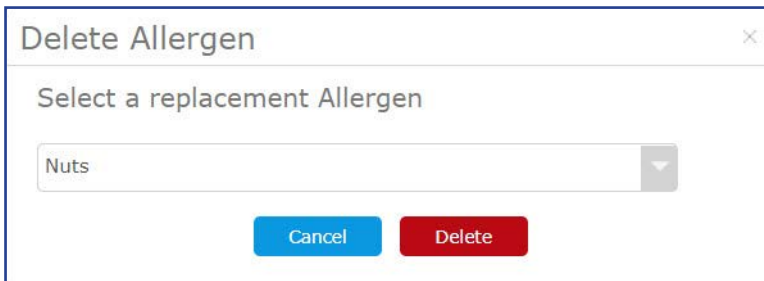
To remove an allergen from the list of available allergens, perform the following procedure.

1. From the left-hand navigation bar, click **Setup**.
2. Click **Allergens**.
3. Enter an allergen name or leave the field blank for all allergens.
4. Click **Search**.
5. Click the **Allergen** hyperlink or double-click the description to open.
6. Click **Delete**. In the confirmation window, click **Yes** to continue.  
**Note:** Allergens attached to an ingredient/recipe cannot be deleted from the list of available allergens. Instead, the allergen must be removed from the ingredient(s) or reassigned.



The screenshot shows the 'Allergen Information' form. The breadcrumb trail is 'Home > Setup > Allergens > Edit'. The form has two fields: 'Allergen:' with the value 'Peanut' and 'Description:' with the value 'Contains peanuts, peanut products/by-products'. At the bottom right, there are four buttons: 'Delete' (red), 'Deactivate' (red), 'Cancel' (blue), and 'Save' (green). The 'Delete' button is highlighted with a red border.

7. If the allergen is attached, use the drop-down menu to select a replacement allergen.
8. Click **Delete** to continue with the process. Click **Cancel** to exit.  
**Note:** During the reassignment process, the following actions occur in the system:
  - Allergens are reassigned to ingredients and recipes where the allergen is attached.
  - The system deletes the allergen from all ingredients and recipes once reassignment has occurred.

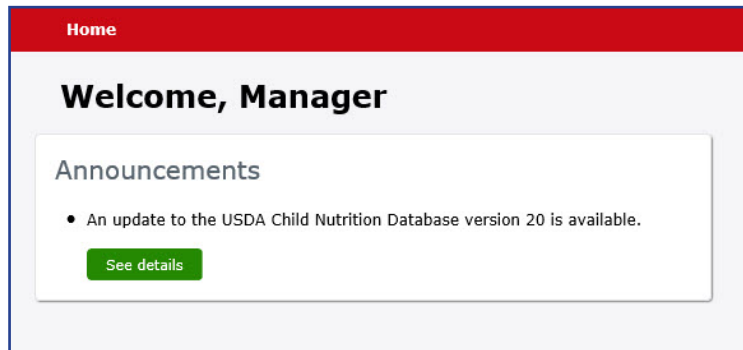


The screenshot shows the 'Delete Allergen' confirmation window. It has a title bar with a close button (X). The main text says 'Select a replacement Allergen'. Below this is a drop-down menu with 'Nuts' selected. At the bottom, there are two buttons: 'Cancel' (blue) and 'Delete' (red).



## CN Update

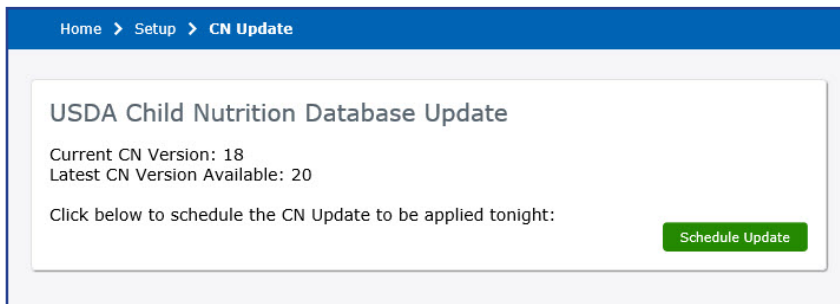
The Child Nutrition (CN) Database is utilized with Mosaic Menu Planning. If Mosaic detects that a new version of the Child Nutrition (CN) Database is available, you should see a message on the Home page upon logging in.



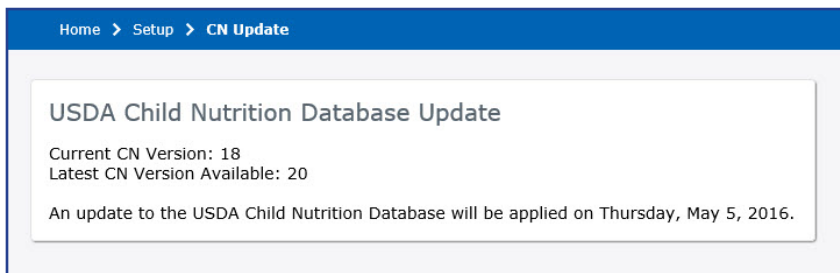
## Perform CN Update

To perform a CN Update:

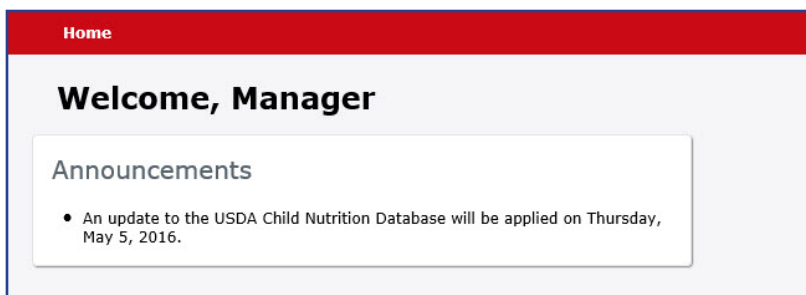
1. From the left-hand navigation bar, click **Setup**.
2. Click **CN Update**.
3. If you would like to update the CN Database tonight, click **Schedule Update**. Otherwise, wait for an appropriate day to schedule the update before clicking Schedule Update.



4. A confirmation message will appear with the date your CN Update will occur.



You will also see a message like this on the Home page.



## District

You can view and edit your district's information within Setup by clicking **District**.

If you have permissions for editing, the District Information page lets you enter and modify information in the text fields. These contain information on your district's address, associated email, phone number, and fax number.

**Note:** You may not change your State.

This page also displays whether your district is MealViewer Enabled.

Click **Save** to save any edits you make on this page, or click **Cancel** to leave the page without making changes to the information.

In addition to text information, you can also add or change the district logo. This logo is used for recipes uploaded through the Community tab; if no picture is assigned to a shared recipe, the district logo is used instead. To update the district logo, click **Change** and select the image you would like to use.

This page also shows you the Site Limit and CN Version. CN Version shows what version of the Child Nutrition database that Mosaic is using. The Site Limit shows how many sites you have and how many you are limited to creating. If your district does not have a limit, it will show "No Limit Set". The Site Limit is not something that can be edited from this page. To adjust your district's site limit, speak with your district representative.

Once you have saved your address, you will also see your time zone displayed at the bottom of the District page.

The screenshot shows a web application interface for editing district information. At the top, there is a breadcrumb trail: Home > Setup > District. The main content area is titled "District Information" and contains a form with the following fields:

District Name:	Heartland School Solutions
Address Line 1:	123 Example St
Address Line 2:	Suite 99
City:	Rochester
State:	NY
Zip Code:	83261
Email:	districtmanager@example.com
Phone Number:	888-999-1111
Fax Number:	na
Site Limit:	No Limit Set
MealViewer Enabled:	No
CN Version:	20.000
Time Zone:	US/Eastern - 6:58 PM - Standard Time (GMT-05)

To the right of the form is a large blue "M" logo. Below the logo are two buttons: "Change" (green) and "Remove" (red). At the bottom right of the form area are two buttons: "Cancel" (blue) and "Save" (green).

## HACCP

You can add, edit, view, and delete HACCP Instructions and HACCP Categories for Mosaic Menu Planning within Setup. Refer to the following procedures for instructions to manage HACCP information.

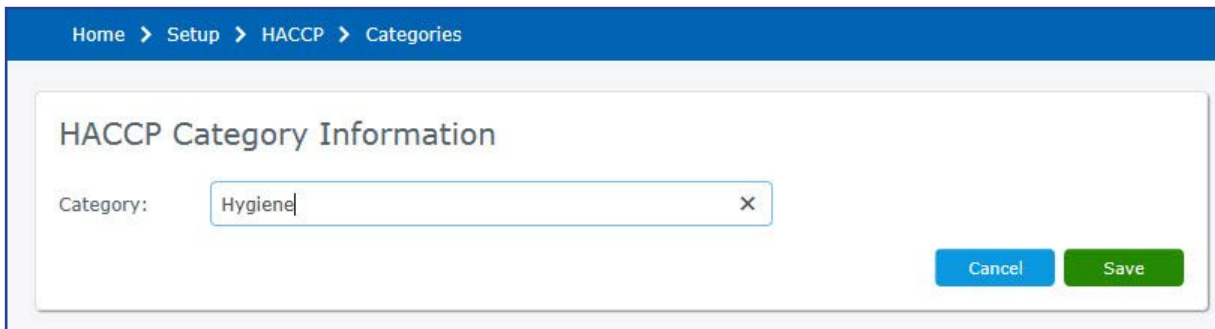
### View a Category

1. From the left-hand navigation bar, click **Setup**.
2. Click **HACCP**.
3. Enter a specific HACCP category or leave the field blank for all categories.
4. Click **Search**.
5. Click the **category** hyperlink.
6. Click **Cancel**.

### Add Categories

Categories must be created prior to adding HACCP Instructions. Perform the following procedure to create a category.

1. From the left-hand navigation bar, click **Setup**.
2. Click **HACCP**.
3. Click **Categories**.
4. Click **Add**.
5. Type the new category in the Category field.
6. Click **Save**.



Home > Setup > HACCP > Categories

HACCP Category Information

Category:  X

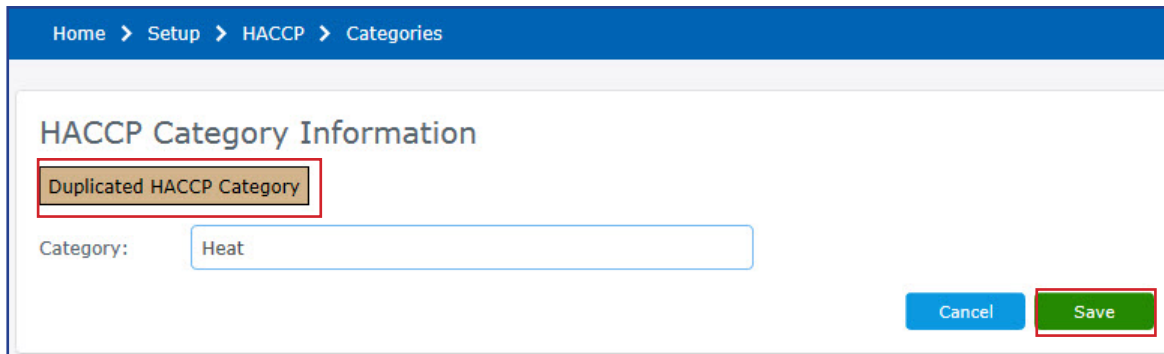
Cancel Save

### Modify Category

1. From the left-hand navigation bar, click **Setup**.
2. Click **HACCP**.
3. Enter a HACCP category name to find a specific category or leave the field blank for all categories.
4. Click **Search**.
5. Click the **category** hyperlink.
6. Type a new description.  
**Note:** The Temperature Category is uneditable.
7. Click **Save**.

## Copy Category

1. From the left-hand navigation bar, click **Setup**.
2. Click **HACCP**.
3. Enter a HACCP category name to find a specific category or leave the field blank for all categories.
4. Click **Search**.
5. Click the **category** hyperlink.
6. Click **Copy**. The status following message displays:
7. Click **Save**.



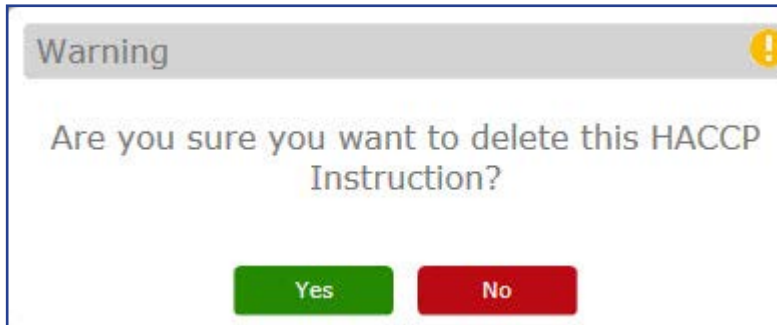
## Delete Category

1. From the left-hand navigation bar, click **Setup**.
2. Click **HACCP**.
3. Enter a HACCP category name to find a specific category or leave the field blank for all categories.
4. Click **Search**.
5. Click the **category** hyperlink.
6. Click **Delete**. The following prompt displays.
7. Click **Yes** to confirm or **No** to cancel the deletion.



## View HACCP Instructions

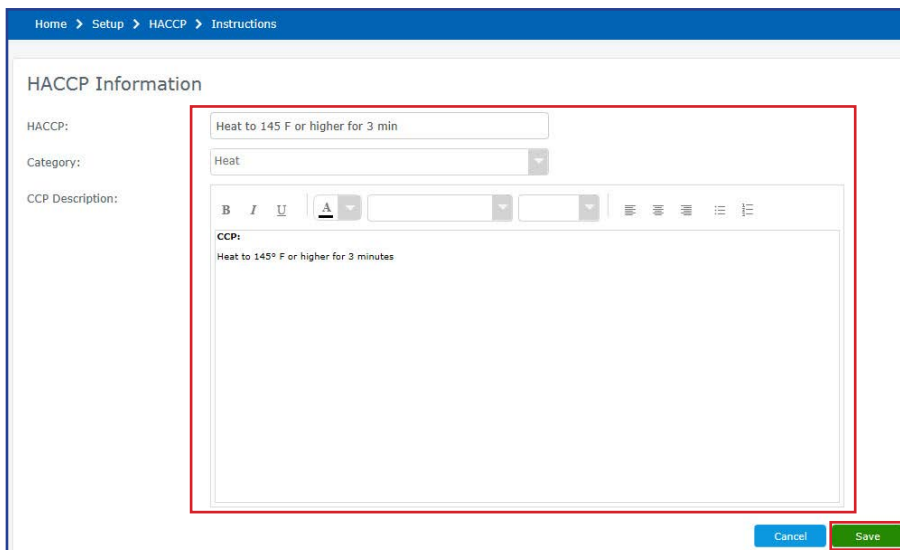
1. From the left-hand navigation bar, click **Setup**.
2. Click **HACCP**.
3. Enter a specific instruction or leave the field blank for all instructions.
4. Click **Search**.
5. Click the **HACCP** hyperlink.
6. Click **Cancel**.



## Add HACCP Instructions

Perform the following procedure to create a HACCP Instructions.

1. From the left-hand navigation bar, click **Setup**.
2. Click **HACCP**.
3. Click **Instructions**.
4. Click **Add**.
5. Type a description in the HACCP field.
6. From the **Category** drop-down, select a category.
7. Type a description in the **CCP Description** field.  
**Note:** You may modify the text using the text formatting options (bold, italic, underline, color, etc)
8. Click **Save**.



## Modify HACCP Instructions

1. From the left-hand navigation bar, click **Setup**.
2. Click **HACCP**.
3. Enter a specific instruction or leave the field blank for all instructions.
4. Click **Search**.
5. Click the **HACCP** hyperlink.
6. Perform the desired changes:
  - a. Modify the description in the HACCP field.
  - b. From the **Category** drop-down, select a new category.
  - c. Modify the description in the **CCP Description** field.
7. Click **Save**.

## Copy HACCP Instructions

1. From the left-hand navigation bar, click **Setup**.
2. Click **HACCP**.
3. Enter a specific instruction or leave the field blank for all instructions.
4. Click **Search**.
5. Click the **HACCP** hyperlink.
6. Click **Copy**. The “Duplicated HACCP” message displays.
7. Click **Save**.

The screenshot shows a web application interface for HACCP information. At the top, a breadcrumb trail reads 'Home > Setup > HACCP > Instructions'. The main content area is titled 'HACCP Information'. A red box highlights a message that says 'Duplicated HACCP'. Below this message are three input fields: 'HACCP:' with the text 'Hot Holding', 'Category:' with a dropdown menu showing 'Temperature', and 'CCP Description:' with a rich text editor. The rich text editor contains the text 'Hold at 140°F or above'. At the bottom right of the form, there are two buttons: 'Cancel' and 'Save', with the 'Save' button highlighted by a red box.

## Delete HACCP Instructions

1. From the left-hand navigation bar, click **Setup**.
2. Click **HACCP**.
3. Enter a specific instruction or leave the field blank for all instructions.
4. Click **Search**.
5. Click the **HACCP** hyperlink.
6. Click **Delete**. The following prompt displays.
7. Click **Yes** to confirm or **No** to cancel the deletion.



## Inventory Adjustment Reasons

Mosaic Ordering and Inventory is preconfigured with several adjustment reasons. You may add additional reasons and delete the existing reasons. Access to Inventory Adjustment Reasons is controlled through the security group **Setup - Inventory Adjustments Reasons** feature.

### Adding an Inventory Adjustment Reason

Perform the following procedure to add an Inventory Adjustment Reason.

1. From the left-hand navigation bar, click **Setup**.
2. Click **Inventory Adjustments Reasons**.
3. Click **Add**.
4. Type the new reason in the top row of the grid and then press **Enter**.

Upon completion the **Inventory Adjustment Reason Added Successfully** prompt displays.

**Inventory Adjustment Reason has been added successfully**

### Deleting an Inventory Adjustment Reason

Perform the following procedure to delete an Inventory Adjustment Reason.

1. From the left-hand navigation bar, click **Setup**.
2. Click **Inventory Adjustments Reasons**.
3. Select **Delete** for the appropriate reason.
4. At the delete confirmation prompt, click **Yes**.  
If the adjustment reason is in use you are prompted to select a replacement. Select the replacement reason and click **Save**.

**Note:** This change will be applied retroactively to existing adjustments.



5. Upon completion the **Inventory Adjustment Reason Deleted Successfully** prompt displays.

**Inventory Adjustment Reason has been deleted successfully**

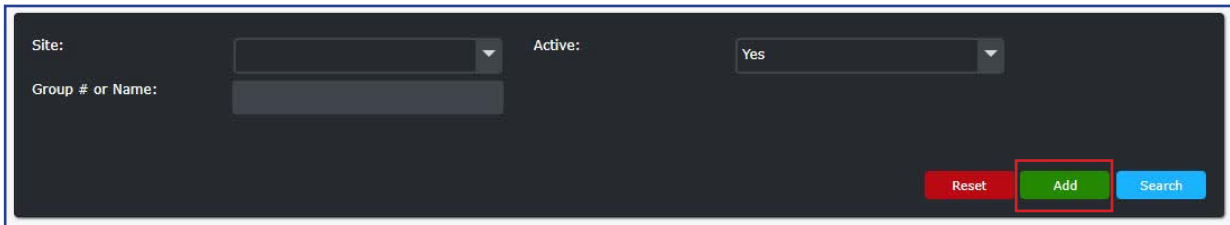
## MealViewer Display Groups

The MealViewer Display Groups page shows all of the display groups that will be used by MealViewer when displaying recipes created in Mosaic. You may add or edit display groups on this page.

**Note:** You do not assign MealViewer display groups on this page. To assign display groups to recipes, see the Recipes section of this guide.

### Add a Display Group

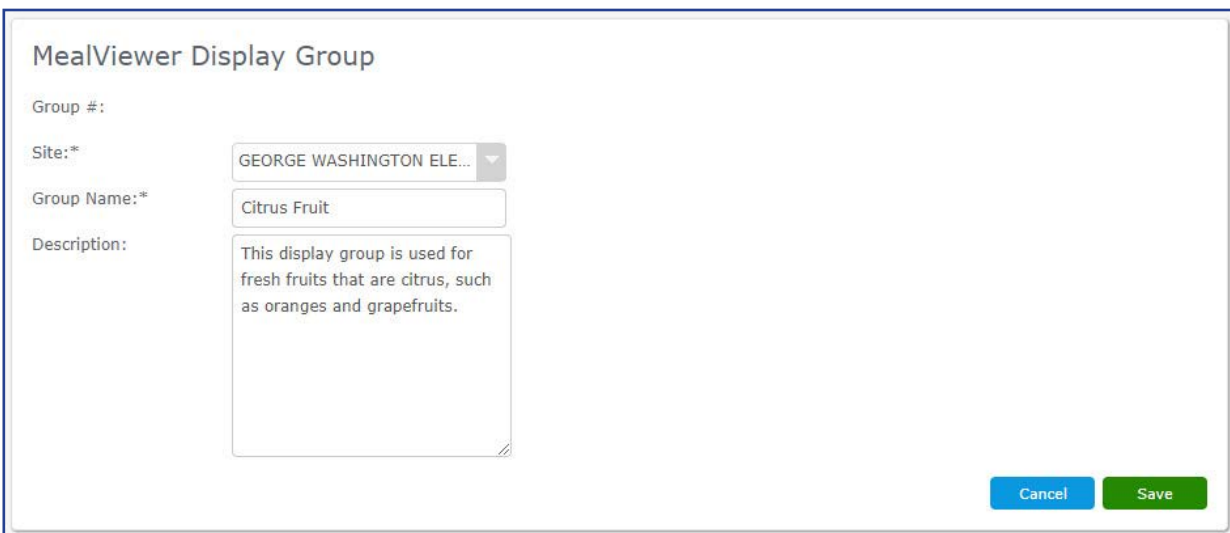
1. From the left navigation bar, click **Setup**.
2. Click **MealViewer Display Groups**.
3. Click **Add**.



A screenshot of the MealViewer Display Groups page. It features a dark-themed interface with a search bar and a dropdown menu for 'Site'. The 'Active' dropdown is set to 'Yes'. The 'Group # or Name' field is empty. At the bottom right, there are three buttons: 'Reset' (red), 'Add' (green, highlighted with a red box), and 'Search' (blue).

The Group # is automatically assigned after saving and creating the display group.

4. Select the Site that will be using this display group.
5. Enter the **Group Name**.
6. Optionally, enter a **Description** for the group. This is used when displaying the group on the list of Display Groups in Mosaic, *not in MealViewer*.
7. Click **Save**.



A screenshot of the 'MealViewer Display Group' form. The form has a white background and a blue border. It contains the following fields: 'Group #' (empty), 'Site:\*' (dropdown menu with 'GEORGE WASHINGTON ELE...' selected), 'Group Name:\*' (text input with 'Citrus Fruit'), and 'Description:' (text area with 'This display group is used for fresh fruits that are citrus, such as oranges and grapefruits.'). At the bottom right, there are two buttons: 'Cancel' (blue) and 'Save' (green).

## Viewing and Editing Display Groups

After creating display groups, you may search for them and view them on the MealViewer Display Groups page.

Use the search filters to find specific display groups, or click **Search** without any filters entered to display a full list of MealViewer display groups. Click **Reset** to remove any entered filters and search results.

Click the **Group #** next to a display group to edit it.

The screenshot shows a search interface with filters for Site and Active status. Below the filters is a table listing 8 items found. The first item, 'Hot food bar3', is selected, and its Group # '1' is highlighted in a red box. The table columns are Group #, Group Name, Site Name, Active, and Description.

Group #	Group Name	Site Name	Active	Description
1	Hot food bar3	CLINTON ELEMENTARY	Yes	ddd
8	mv	GEORGE WASHINGTON ELEMENTARY	Yes	mv
2	Pizza and pasta	CLINTON ELEMENTARY	Yes	
3	Pizza and pasta	GEORGE WASHINGTON ELEMENTARY	Yes	
6	Pizza Line 2	CLINTON ELEMENTARY	Yes	Offsite pizza
5	Pizza Station	CLINTON ELEMENTARY	Yes	The description is optional and will (pres...
1	Salad Bar	CLINTON ELEMENTARY	Yes	Offering salad and raw vegetable options
7	Salad Bar	GEORGE WASHINGTON ELEMENTARY	Yes	duplicate

After selecting a display group, you may edit its Group Name or its Description. The Group # and associated Site cannot be changed. After making your changes, click **Save**.

The screenshot shows the edit form for a display group. The Group # is 1, the Site is CLINTON ELEMENTARY, the Group Name is 'Salad Bar', and the Description is 'Offering salad and raw vegetable options'. The form includes buttons for Deactivate, Cancel, and Save.

MealViewer Display Group

Group #: 1

Site: CLINTON ELEMENTARY

Group Name: Salad Bar

Description: Offering salad and raw vegetable options

Deactivate Cancel Save

## Deactivating and Activating Display Groups

After creating a MealViewer display group, it is automatically made active. You may wish to deactivate a display group, which would remove it from the MealViewer tab on Menus and prevent it from being used on recipes.

To deactivate a display group, search for the display group and click the associated **Group #**.

Site: [dropdown] Active: Yes [dropdown]  
Group # or Name: [input]  
Reset Add Search

8 Items Found Items per Page 20

Group #	Group Name	Site Name	Active	Description
4	Hot food bar3	CLINTON ELEMENTARY	Yes	ddd
8	mv	GEORGE WASHINGTON ELEMENTARY	Yes	mv
2	Pizza and pasta	CLINTON ELEMENTARY	Yes	
3	Pizza and pasta	GEORGE WASHINGTON ELEMENTARY	Yes	
6	Pizza Line 2	CLINTON ELEMENTARY	Yes	Offsite pizza
5	Pizza Station	CLINTON ELEMENTARY	Yes	The description is optional and will (pres...
1	Salad Bar	CLINTON ELEMENTARY	Yes	Offering salad and raw vegetable options
7	Salad Bar	GEORGE WASHINGTON ELEMENTARY	Yes	duplicate

<< < 1 > >>

After opening the display group, click **Deactivate**. A message will display at the top of the screen to confirm the deactivation.

MealViewer Display Group

Group #: 1  
Site: CLINTON ELEMENTARY  
Group Name: Salad Bar  
Description: Offering salad and raw vegetable options

Deactivate Cancel Save

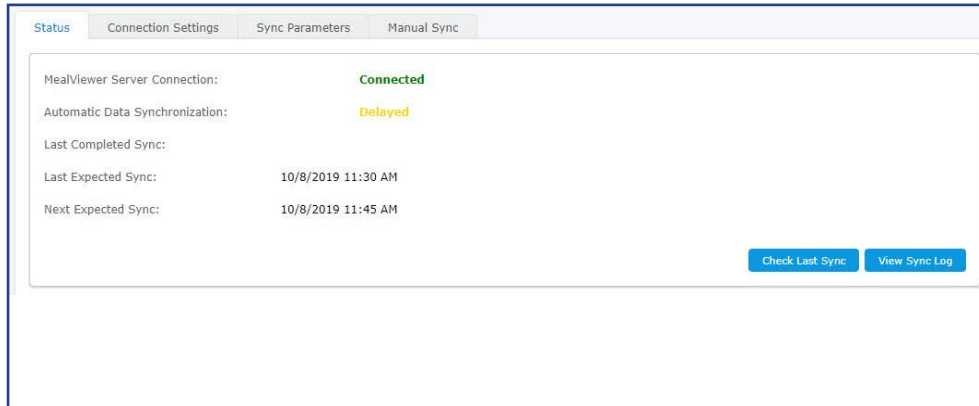
To activate a deactivated display group, click **Activate**.

Activate Cancel Save

## MealViewer Settings

If you are integrating Mosaic with MealViewer, the MealViewer Settings page is used to set up and troubleshoot the synchronization of data between Mosaic and MealViewer. It should only be used with assistance from Support staff.

**IMPORTANT:** If you need to change MealViewer settings or perform a Full Sync, contact Mosaic Support for assistance. Support is available by phone at 800-256-8224 and by email at [mosaicsupport@e-hps.com](mailto:mosaicsupport@e-hps.com).



The screenshot shows the MealViewer Settings page with the following information:

Item	Status
MealViewer Server Connection:	Connected
Automatic Data Synchronization:	Delayed
Last Completed Sync:	
Last Expected Sync:	10/8/2019 11:30 AM
Next Expected Sync:	10/8/2019 11:45 AM

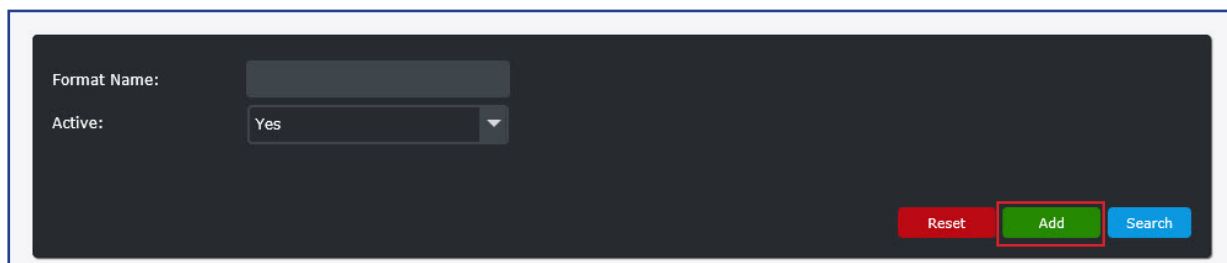
Buttons: Check Last Sync, View Sync Log

## Menu Plan Calendar Formats

Menu Plan Calendar Formats let you customize what information appears when you run a Menu Plan Calendar report by saving a format that can be used for future calendar reports. For more information on Menu Plan Calendar reports, see the **Reports** section of this guide.

### Add a Menu Plan Calendar Format

1. From the left navigation bar, click **Setup**.
2. Click **Menu Plan Calendar Formats**.
3. Click **Add**.



The screenshot shows the form for adding a new Menu Plan Calendar Format. It includes the following fields and buttons:

- Format Name:
- Active:
- Buttons: Reset, Add, Search

4. Enter a name in the **Format Name** field, and enter a heading in the **Report Heading** field.

Use the drop-down menus to select which information will be included in the Menu Plan Calendar format.

**Display Date As:** You can select how the date is displayed on the calendar report. Numbers Only shows the date numerically, for example 7/28/2016. Month and Number shows the month name followed by the day and year, for example July 28th 2016. Day Name and Full Date shows the name of the day followed by the full date, for example Thursday July 28th 2016. Blank leaves the Date field blank so that it is not displayed or so that it can be filled in manually.

**Include Excluded Recipes:** By default, recipes with the “Exclude Recipe from Calendar Report” option checked will not show up on Menu Plan Calendar reports. This option allows you to include otherwise excluded recipes.

**Include Repeated Items:** If you have an item on a menu day more than once, you can choose to show it on the calendar more than once. If this is not checked, the repeated item will only be shown once.

**Include District Name:** This option allows you to display the district’s name on the calendar.

**Use Alternate Menu Name:** If you have an Alternate Menu Name established in your recipes, the program will print it under the normal Menu Name on the calendar.

You have the option to either include the 1st or 2nd Alternate Menu Name.

**Include Nutrient Guidelines:** Shows the nutrient guideline and the age range that is selected for this menu.

**Include Published Date:** This option will display the date the report was published on the report itself.

**Include Saturday and Sunday:** This option allows you to show Saturday and Sunday menus on the calendar.

**Include Site Name:** This option allows you to display the school’s name on the calendar.

**Include Menu Name:** This option allows you to display the menu name on the calendar. If this setting is set to “Yes,” the menu name will display on the school calendar.

The screenshot shows a software configuration window with the following settings:

Field	Value
Format Name	New Calendar
Report Heading	Menu Plan Calendar
Display Date As	Numbers Only
Include Excluded Recipes	No
Include Repeated Items	No
Include District Name	No
Use Alternate Menu Name	Alternate Menu Name 2
Include Nutrient Guidelines	No
Include Published Date	No
Include Saturday And Sunday	No
Include Site Name	No
Include Menu Name	No

5. Once you have finished editing the General tab, click the **Web Export Options** tab.

- On the left, select which nutrients you would like to display on the report by clicking the check box next to the nutrient(s).
- Use the drop-down menus to select which information will be included in the Menu Plan Calendar format.  
**Include Daily Nutrients:** Setting this option to “Yes” will provide a link that shows the nutrient values for each day.  
**Nutrients to Include:** If Daily Nutrients are included on the calendar, select which nutrients will be shown using the check boxes.  
**Include Allergens:** Setting this option to “Yes” will provide a link that shows the allergens present in any menu items for each day.  
**Allergens to Exclude:** If Allergens are included on the calendar, use the check boxes to select which allergens WILL NOT be shown when the user clicks the “View Allergens” link.  
**Include Disclaimer:** This option allows you to show a disclaimer at the bottom of the calendar.  
**Include Nutrient Data Legend:** This option allows you to display a graphic that explains what the various nutrient data symbols and abbreviations mean.

The screenshot shows a configuration window with four tabs: General, Web Export Options (selected), Page Setup, and Page Design. The Web Export Options tab contains the following settings:

- Include Daily Nutrients:** No (dropdown)
- Include Allergens:** Yes (dropdown)
- Nutrients to Include:** A list of checkboxes for: Calories, Sat Fat, Sodium, Sugars, Total Fat, Trans Fat, Cholesterol, Carbohydrates, Fiber, Protein, Vitamin A-IU, Calcium, Vitamin C, and Iron. All are currently unchecked.
- Allergens to Exclude:** A list of checkboxes for: Egg, Fish, Milk (checked), Peanut, Shellfish, Soy, TreeNut, and Wheat. All are currently unchecked.
- Include Nutrient Data Legend:** No (dropdown)
- Include Disclaimer:** Yes (dropdown)

At the bottom of the window, there is a note: “\*Allergens in the “Allergens to Exclude” list will not be excluded in the Preview.” and three buttons: Preview, Cancel, and Save.

- Once you have finished editing the Web Export Options tab, click the **Page Setup** tab.

# SETUP

- At the top, you may adjust the various ways text is displayed on the report, such as page margins, font size, and, most importantly, the size of the paper that will be used to print the report.
- You may also add a header and footer to the report and add or remove images from headers and footers; this can be useful if you would like to display a school logo on the report. To add an image to the report header or footer, click **Add Image** under the Header or Footer field. To remove the image, click **Remove Image**.

The screenshot shows a software interface with four tabs: General, Web Export Options, Page Setup (selected), and Page Design. The Page Setup tab contains the following elements:

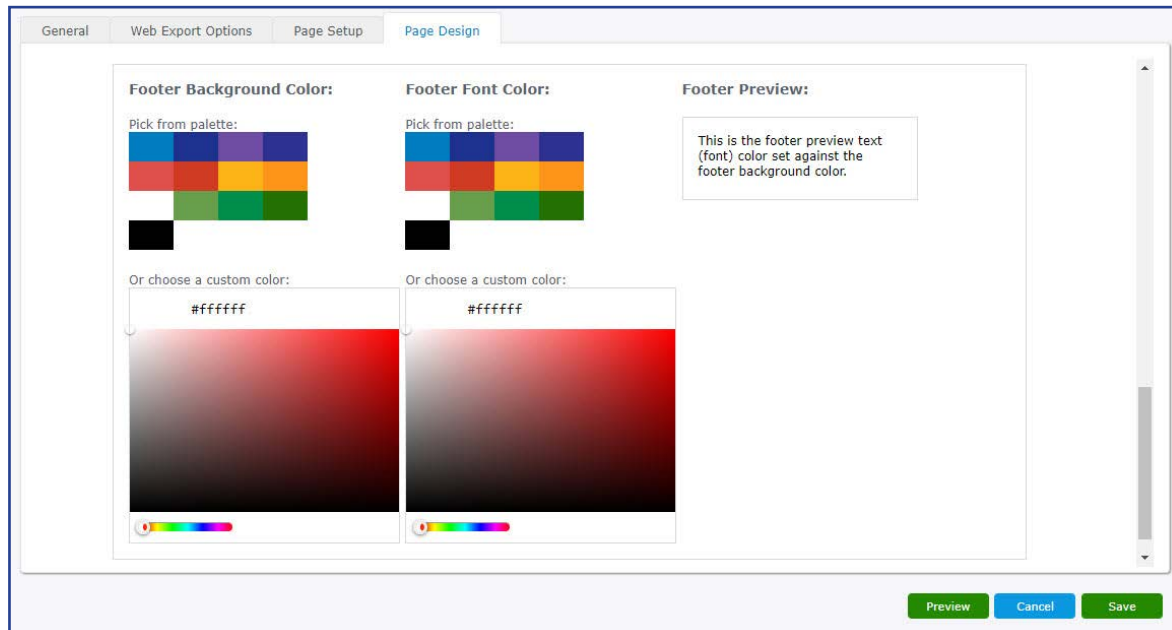
- Font Name: Arial (dropdown)
- Orientation: Portrait (dropdown)
- Top Margin: 1/8 inch (dropdown)
- Bottom Margin: 1/8 inch (dropdown)
- Font Size: 6 (dropdown)
- Paper Size: Letter (dropdown)
- Left Margin: 1/8 inch (dropdown)
- Right Margin: 1/8 inch (dropdown)
- Header section: Includes a rich text editor toolbar with Bold (B), Italic (I), Underline (U), Bulleted List, Numbered List, and Indentation icons. Below the toolbar is a large text input field. Underneath the field are two buttons: "Add Image" and "Remove Image".
- Footer section: Includes the same rich text editor toolbar as the header. Below it is another large text input field, followed by "Add Image" and "Remove Image" buttons.

At the bottom right of the window, there are three buttons: "Preview" (green), "Cancel" (blue), and "Save" (green).

- Once you have finished editing the Page Setup tab, click the **Page Design** tab.



- The Page Design tab lets you change colors for the Header, Date, and Footer sections of the Menu Plan Calendar report. For each section, you may change the background color and the font color. You can select from pre-made swatches, or you may select a custom color using the sliding gradients. Alternately, you may enter a custom color if you know its hexadecimal value.  
Use the Header Preview, Day Name and Date Preview, and Footer Preview boxes to see how the selected colors will look on the report.
- Once you have made all of your adjustments, use **Preview** to see how the report will look when it is finished.
- When you are finished, click **Save** to save the format.



## Modify a Menu Plan Calendar Format

- From the left-hand navigation bar, click **Setup**.
- Click **Menu Plan Calendar Formats**.
- Enter a specific format or leave the field blank for a list of all formats.
- Click **Search**.
- Click the name of the format you would like to modify.
- Make the desired changes to the Menu Plan Calendar format.
- When finished, click **Save** to update the format.

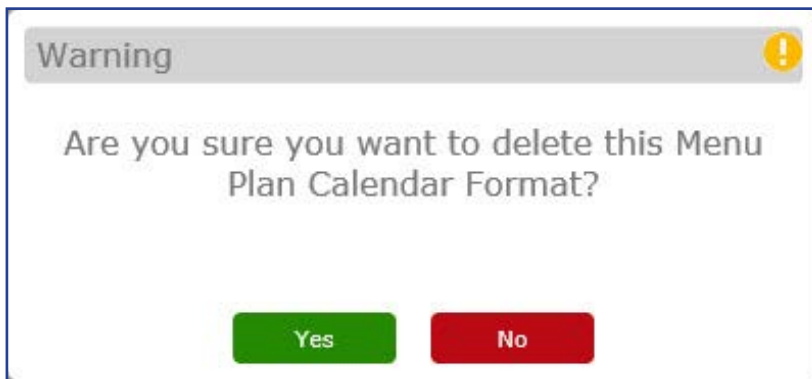
## Copy a Menu Plan Calendar Format

1. From the left-hand navigation bar, click **Setup**.
2. Click **Menu Plan Calendar Formats**.
3. Enter a specific format or leave the field blank for a list of all formats.
4. Click **Search**.
5. Click the name of the format you would like to copy.
6. Click **Copy**. A copy of the format will be created with everything identical except for a blank Format Name.
7. Make any modifications, including the new format's name.
8. Click **Save** to save the copy as a new format.



## Delete a Menu Plan Calendar Format

1. From the left-hand navigation bar, click **Setup**.
2. Click **Menu Plan Calendar Formats**.
3. Enter a specific format or leave the field blank for a list of all formats.
4. Click **Search**.
5. Click the name of the format you would like to delete.
6. Click **Delete**.
7. A confirmation message will appear. Click **Yes** to delete the format.



## Deactivate a Menu Plan Calendar Format

1. From the left-hand navigation bar, click **Setup**.
2. Click **Menu Plan Calendar Formats**.
3. Enter a specific format or leave the field blank for a list of all formats.
4. Click **Search**.
5. Click the name of the format you would like to deactivate.
6. Click **Deactivate**.



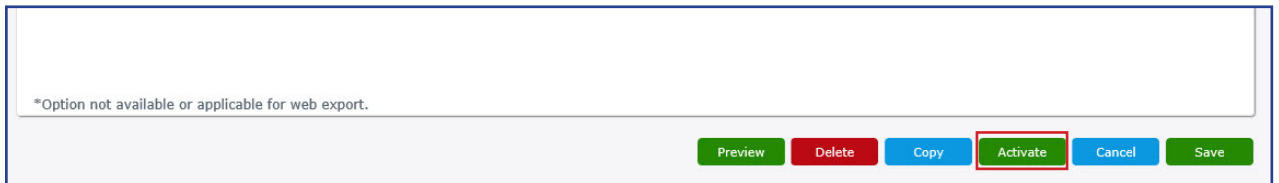
\*Option not available or applicable for web export.

Preview Delete Copy **Deactivate** Cancel Save

The screenshot shows a search results interface. At the top, there is a text input field containing the placeholder text '\*Option not available or applicable for web export.'. Below the input field is a horizontal row of action buttons: 'Preview' (green), 'Delete' (red), 'Copy' (blue), 'Deactivate' (red, highlighted with a red border), 'Cancel' (blue), and 'Save' (green).

## Activate a Menu Plan Calendar Format

1. From the left-hand navigation bar, click **Setup**.
2. Click **Menu Plan Calendar Formats**.
3. Enter a specific format or leave the field blank for a list of all formats. Make sure that the **Active** drop-down field is set either to **No** or **[blank]**. It is set to "Yes" by default, which excludes deactivated formats.
4. Click **Search**.
5. Click the name of the format you would like to reactivate.
6. Click **Activate**.



\*Option not available or applicable for web export.

Preview Delete Copy **Activate** Cancel Save

The screenshot shows a search results interface. At the top, there is a text input field containing the placeholder text '\*Option not available or applicable for web export.'. Below the input field is a horizontal row of action buttons: 'Preview' (green), 'Delete' (red), 'Copy' (blue), 'Activate' (green, highlighted with a red border), 'Cancel' (blue), and 'Save' (green).

## Production Record Formats

You can customize a Production Record Format, for future use, with various information, such as recipe name, recipe number, portion size, and production notes.

Once created here, production records can be printed under the **Reports** tab by clicking **Production Records**.

### Add a Production Record Format

1. From the left-hand navigation bar, click **Setup**.
2. Click **Production Record Formats**.
3. Click **Add**.

The screenshot shows the 'Production Record Formats' page in a web application. The breadcrumb trail is 'Home > Setup > Production Record Formats'. The form has a dark background. It includes a 'Format Name:' text input field, an 'Active:' dropdown menu currently set to 'Yes', and three buttons at the bottom right: 'Reset' (red), 'Add' (green, highlighted with a red box), and 'Search' (blue).

4. On the General tab, enter a title for the report under Format Name.
5. Enter the text that will appear on the top of every page of the report under Report Heading.
6. Click **Add**.

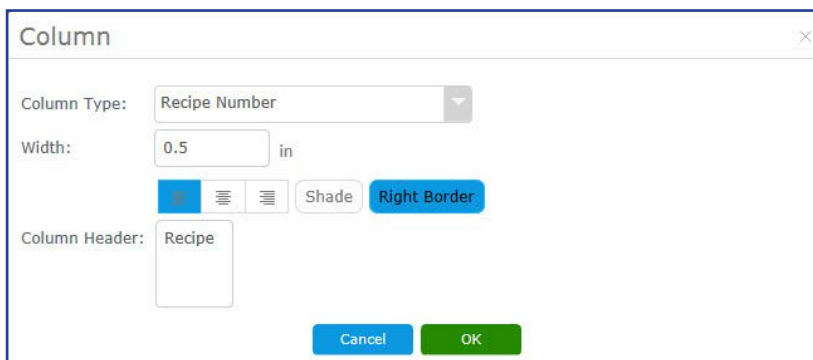
The screenshot shows the 'Production Record Formats' page in an 'Edit' mode. The breadcrumb trail is 'Home > Setup > Production Record Formats > Edit'. There are two tabs: 'General' (selected) and 'Page Setup'. The 'Format Name:' field contains 'New Production Record Format' and the 'Report Heading:' field contains 'Production Record'. A 'Blank Rows:' field is set to '0'. Below these is a table with columns: '#', 'Column Type', 'Column Header', 'Width', 'Text Align', 'Shade', and 'Right Bord...'. The table has three rows:

#	Column Type	Column Header	Width	Text Align	Shade	Right Bord...
1	<a href="#">Recipe Number</a>	Recipe	0.5	Left	No	Yes
2	<a href="#">Source of Recipe</a>	Source	0.9	Left	No	Yes
3	<a href="#">Menu Item Cost</a>	Menu Item Cost	0.5	Left	No	Yes

At the bottom, there is an 'Add' button (green, highlighted with a red box) and several checkboxes for options like 'Auto Extend Last Column', 'Print Zero Quantity Items', etc. At the very bottom right are 'Preview' (green), 'Cancel' (blue), and 'Save' (green) buttons.

# SETUP

- a. Select what information will be populating the column by clicking the **Column Type** drop-down menu. Alternatively, select **Blank Column (hand filled)** if you would like to create a custom column.
  - b. Adjust the size of the column using the Width field. This will adjust the column header window at the bottom so you can see what the column header will look like when printed.
  - c. Use the formatting buttons under the Width field to toggle text alignment (left, center, right-justified), whether the column is shaded (**Shade** button), and whether the column has a border to the right (**Right Border**).
  - d. Edit the column header's text by typing in the Column Header field. You may edit this field even if you did not select Blank Column (hand filled).
7. Click **OK**.



The screenshot shows a dialog box titled "Column" with a close button (X) in the top right corner. Inside the dialog, there are several fields and buttons:

- Column Type:** A dropdown menu currently showing "Recipe Number".
- Width:** A text input field containing "0.5" followed by "in".
- Formatting Buttons:** Three buttons for text alignment (left, center, right), a "Shade" button, and a "Right Border" button.
- Column Header:** A text input field containing the word "Recipe".
- Bottom Buttons:** "Cancel" and "OK" buttons.

8. Repeat steps 6-7 for each column you would like to add to the production record format.
9. Select options to include/exclude when running the report by clicking in each box.
  - a. **Auto Extend Last Column** - Extends the last column of the Production Record to the end of the page.
  - b. **Combine Leftovers** - Combines leftovers from all sites that were entered on the same date. If unchecked, leftovers will be shown as different line items per site.
  - c. **Print Temperature Recordings** - Prints temperature recordings (date, time, pass/fail) on the last page.
  - d. **Print Zero Quantity Items** - Displays items on the report even if there are none on hand.
  - e. **Display Component Values as Decimal** - Displays food component values (Meat/Alternative, Grain, Vegetable, Fruit, and Milk cups) as decimals instead of the default fractions.
  - f. **Print Blank When No Data Entered** - Displays blank quantities when no data has been entered.
  - g. **Print Offered Meal Totals** - Displays Offered production records on the report. If unchecked, no meal total will appear on the printed reports.
  - h. **Print Planned Meal Totals** - Displays Planned production records on the report. If unchecked, no meal total will appear on the printed reports.
  - i. **Print All Meals** - Displays all meal production records (Offered, Planned, and Served) on the report.
  - j. **Print Full Site Name** - Displays the full site name. If unchecked, only the site number and code appear.
  - k. **Use Sub for Grain Header** - If checked, when the Food Based Components column type is used, this will change the column displaying meat/meat alternatives to a column displaying substitutions for grain.

## Overview of Column Types

**Blank Column (hand filled):** This column will appear blank and can be used when creating a production record where you want the staff to fill in quantities or information.

**Recipe Number:** This is the number assigned to the recipe when you create it.

## Overview of Column Types (Continued)

**Recipe Name:** This will list only the recipe name without the ingredients or recipe number.

**Recipe & Ingredients:** Displays the recipe number, name, serving size, and ingredients from your recipe.

**Source of Recipe:** This is just the source of the recipe. This information was added when the recipe was created.

**Portion Size:** Required for multiple menus. This is the portion size you selected when you created the menu, not the portion size listed on the recipe.

**Food Based Components:** This information is generated from the component information within recipe. Mosaic will calculate the contribution based on the portion size of the recipe on this menu. If you did not add the component information to the recipe, the column will appear blank.

**Menu Item Cost:** This information is generated from the cost entered into the Purchase Info tab of the ingredient. This info can only be entered if you have the Costing module.

**Short/Leftover:** Displays the values of the short/leftover column from the production quantities.

**Waste:** Displays the values of the waste column from the production quantities.

**Production Notes:** This field is pulled from the Notes tab of the recipe.

**Purchasing Guide:** This field is pulled from the Notes tab of the recipe.

**Serving Notes:** This field is pulled from the Notes tab of the recipe.

**Miscellaneous Notes:** This field is pulled from the Notes tab of the recipe.

**HACCP Process:** This field is pulled from the HACCP Process field in the recipe.

**Planned Quantity - Reimbursable:** This information is generated from the number entered in the Reimburse Column within the Planned column in production quantities for a specific school site.

**Planned Quantity - A la Carte:** This information is generated from the number you entered in the Ala Carte column within the Planned column in production quantities of the specific school site.

**Planned Quantity - Total:** This sum is calculated from the numbers you entered for the reimbursable and ala carte planned quantity in production quantities.

**Offered Quantity - Reimbursable:** This information is generated from the number entered in the Reimburse Column within the Offered column in production quantities for a specific school site.

**Offered Quantity - A la Carte:** This information is generated from the number you entered in the Ala Carte column within the Offered column in production quantities of the specific school site.

**Offered Quantity - Total:** This sum is calculated from the numbers you entered for the reimbursable and ala carte offered quantity in production quantities.

**Served Quantity - Reimbursable:** This information is generated from the number entered in the Reimburse Column within the Served column in production quantities for a specific school site.

**Served Quantity - A la Carte:** This information is generated from the number you entered in the Ala Carte column within the Served column in production quantities of the specific school site.

**Served Quantity - Total:** This sum is calculated from the numbers you entered for the reimbursable and ala carte served quantity in production quantities.

**Temp (°F):** This information is generated from the number you entered in the Temp (°F) column in production quantities.

**Comment:** This information is taken from the additional comments you entered in the Comment column in production quantities.

**Planned Measures:** This is taken from the number you entered in the Planned column in production quantities.

## Overview of Column Types (Continued)

**Offered Measures:** This information is taken from the number you entered in the Offered column in production quantities.

**Served Measures:** This information is taken from the number you entered in the Served column in production quantities.

**Total Food Cost:** This information is generated by taking (from the Production Quantities screen of the menu) the total of both the Served Reimbursable and Served Ala Carte amounts and subtracts the amount in the Short/Leftover column.

10. Click the **Page Setup** tab.

11. The top of the Page Setup tab contains many different word processing options, including:

**Font Name** - changes the font of the report text

**Font Size** - changes the size of the report text

**Orientation** - changes whether the report is printed in Portrait or Landscape format

**Paper Size** - changes how the report is printed so that it fits on either Letter-size paper or Legal-size paper.

**Margins** - these options allow you to change the page margins of the report.

Adjust these options to your desired specifications.

12. If desired, enter heading text in the Header text field. If you want your heading to appear on every page, check the option **Include Header on each page**. If you want to add an image to the header, click **Add Image**. Click **Remove Image** to remove a header's image.

13. If desired, enter footer text in the Footer text field. If you want your footer to appear on every page, check the option **Include Footer on each page**. If you want to add an image to the header, click **Add Image**. Click **Remove Image** to remove a header's image.

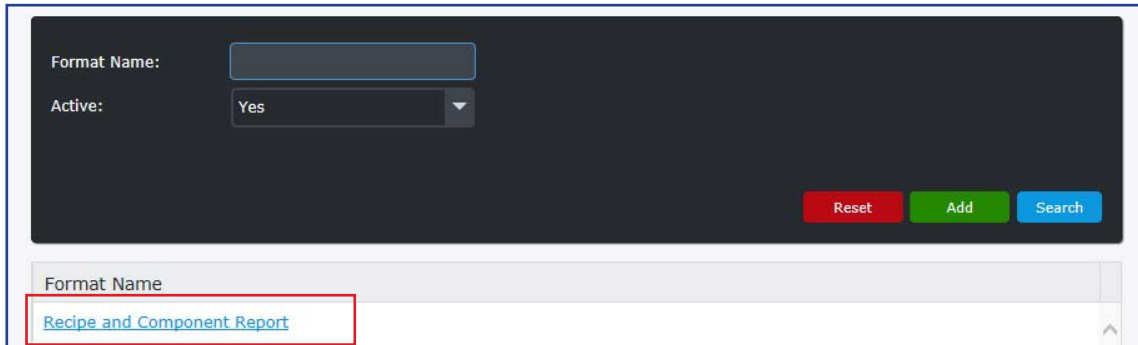
14. If you want to see how the report will look, click **Preview** to generate a blank report.

15. When you have finished adjusting the settings, click **Save**.

16. Once saved, you can run the new Production Record under the **Reports** tab.

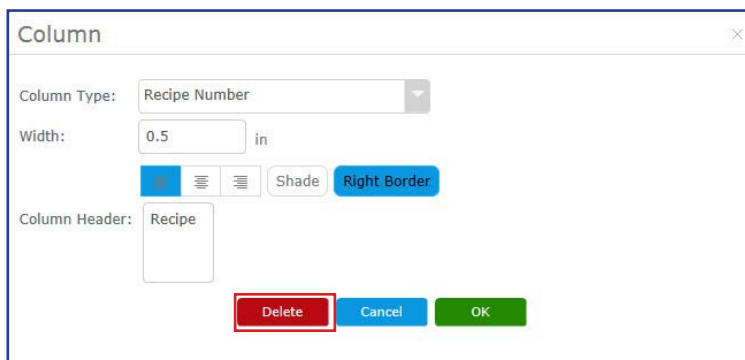
## Modify a Production Record Format

1. From the left-hand navigation bar, click **Setup**.
2. Click **Production Record Formats**.
3. You can search by name or by if it is active, or can just click **Search** to display all available production record formats.
4. Click the name of the production record format.



The screenshot shows a search interface for production record formats. It features a dark-themed header with a search bar for 'Format Name' and a dropdown menu for 'Active' set to 'Yes'. Below the search bar are three buttons: 'Reset' (red), 'Add' (green), and 'Search' (blue). Below the search bar is a list of results, with 'Recipe and Component Report' highlighted in a red box.

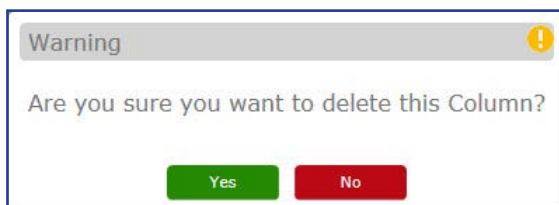
5. Perform the desired changes similarly to how you would if adding a new format.
  - a. If you would like to delete a column, click the column name.
  - b. Click **Delete**.



The screenshot shows a 'Column' configuration dialog box. It has a title bar with a close button. The dialog contains the following fields and controls:

- 'Column Type': A dropdown menu set to 'Recipe Number'.
- 'Width': A text input field with '0.5' and a unit dropdown set to 'in'.
- 'Column Header': A text input field with 'Recipe'.
- Buttons: 'Shade', 'Right Border', 'Delete' (red), 'Cancel' (blue), and 'OK' (green).

- c. Click **Yes**.



The screenshot shows a 'Warning' dialog box with a yellow warning icon in the top right corner. The text inside the dialog reads: 'Are you sure you want to delete this Column?'. At the bottom of the dialog are two buttons: 'Yes' (green) and 'No' (red).

6. When finished, click **Save**.



## Copy a Production Record Format

1. From the left-hand navigation bar, click **Setup**.
2. Click **Production Record Formats**.
3. You can search by name or by if it is active, or can just click **Search** to display all available production record formats.
4. Click the name of the production record format.
5. Click **Copy**.
6. Enter a name for the copied format in the Format Name field.
7. Make any desired changes to the copied format.
8. When finished, click **Save**.

## Delete a Production Record Format

1. From the left-hand navigation bar, click **Setup**.
2. Click **Production Record Formats**.
3. You can search by name or by if it is active, or can just click **Search** to display all available production record formats.
4. Click the name of the production record format.
5. Click **Delete**.
6. Click **Yes** to confirm or click **No** to cancel the deletion.



## Deactivate a Production Record Format

1. From the left-hand navigation bar, click **Setup**.
2. Click **Production Record Formats**.
3. You can search by name or by if it is active, or can just click **Search** to display all available production record formats.
4. Click the name of the production record format.
5. Click **Deactivate**.

	1	Left	No	Yes
	0.75	Center	No	Yes
	0.5	Center	No	Yes
	0.5	Center	No	Yes
	0.688	Left	No	Yes
	0.688	Left	No	Yes
	0.625	Left	No	Yes

Zero Quantity Items  Print Offered Meal Totals  Print Full Site Name  
Display Component Values as Decimal  Print Planned Meal Totals  
Blank When No Data Entered  Print All Meals

## Activate a Production Record Format

1. From the left-hand navigation bar, click **Setup**.
2. Click **Production Record Formats**.
3. You can search by name or by if it is active, or can just click **Search** to display all available production record formats. Make sure that the **Active** drop-down field is set either to **No** or **[blank]**. It is set to “Yes” by default, which excludes deactivated formats.
4. Click the name of the production record format.
5. Click **Activate**.

	1	Left	No	Yes
	0.75	Center	No	Yes
	0.5	Center	No	Yes
	0.5	Center	No	Yes
	0.688	Left	No	Yes
	0.688	Left	No	Yes
	0.625	Left	No	Yes

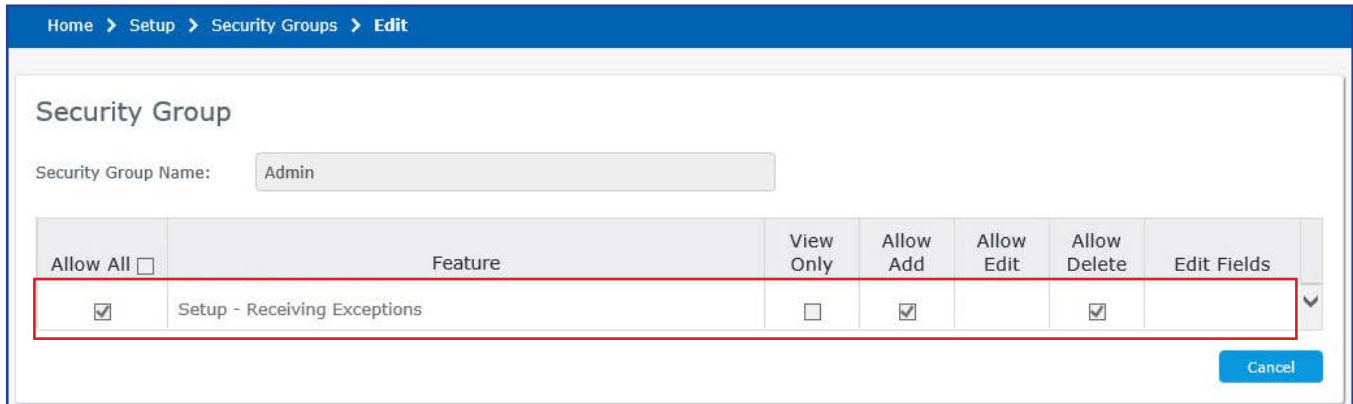
Quantity Items  Print Offered Meal Totals  Print Full Site Name  
Display Component Values as Decimal  Print Planned Meal Totals  
Blank When No Data Entered  Print All Meals

## Receiving Exceptions

You can add or delete receiving exceptions under Setup.

### Security Group Settings

Access to the Setup > Receiving Exceptions is controlled through the security group, **Setup - Receiving Exceptions** feature. The user must be assigned to a security group that has the **Allow Add** or **Allow Delete** check boxes selected for this feature.



The screenshot shows the 'Security Group Edit' page. The breadcrumb trail is 'Home > Setup > Security Groups > Edit'. The 'Security Group Name' is 'Admin'. Below is a table with columns: 'Allow All', 'Feature', 'View Only', 'Allow Add', 'Allow Edit', 'Allow Delete', and 'Edit Fields'. The 'Allow All' checkbox is unchecked. The 'Feature' column contains 'Setup - Receiving Exceptions'. The 'View Only' checkbox is unchecked. The 'Allow Add' checkbox is checked. The 'Allow Delete' checkbox is checked. The 'Edit Fields' column is empty. A 'Cancel' button is at the bottom right.

Allow All <input type="checkbox"/>	Feature	View Only	Allow Add	Allow Edit	Allow Delete	Edit Fields
<input checked="" type="checkbox"/>	Setup - Receiving Exceptions	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

### Adding a Receiving Exception

Perform the following procedure to add a Receiving Exception.

1. From the left-hand navigation bar, click **Setup**.
2. Click **Receiving Exceptions**.
3. Click **Add**.
4. Type the new exception in the top row of the grid and then press **Enter**.
5. Upon completion the **Receiving Exceptions has been added successfully** prompt displays.

Receiving Exception has been added successfully

### Deleting a Receiving Exception

Perform the following procedure to delete a Receiving Exception.

1. From the left-hand navigation bar, click **Setup**.
2. Click the **Receiving Exception** you would like to delete.
3. Click **Delete**.
4. At the delete confirmation prompt, click **Yes**.  
If the receiving exception is in use you are prompted to select a replacement. Select the replacement exception and click **Save**.  
**Note:** This change will be applied retroactively to existing receiving transactions.
5. Upon completion the **Receiving Exceptions has been deleted successfully** prompt displays.

Receiving Exception has been deleted successfully

## Security Groups

You can set up specific security groups within Mosaic so that you can set some users at different security levels, depending on what kind of access they need. This will help ensure certain users are not exposed to sensitive information.

When adding in a new Security Group, the different options are as follows:

- **View Only** – This option gives the user View Only access, which means they can see the specified information; however, they cannot modify any information in this section of the program.
- **Allow Add** – This option gives the user the ability to add new information to the program when applicable (e.g. products, ingredients).
- **Allow Edit** – This option lets the user edit all aspects of the specified area of the program.
- **Allow Delete** – This option gives the user the ability to delete or deactivate information from the program when applicable (e.g. user-defined product categories, locally added ingredients or recipes).
- **Edit Fields** – This option exists to limit access for certain users that only need some permissions, but not all functionality within a specific part of the program (e.g. the ability to Commit Transfers from Warehouse under Inventory - Transfers).

If none of the options above are checked for a security group, users belonging to that security group will not see that feature in Mosaic, and they will not be able to access it at all.

Allow All <input type="checkbox"/>	Feature	View Only	Allow Add	Allow Edit	Allow Delete	Edit Fields
<input checked="" type="checkbox"/>	Inventory - Usage	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	Inventory - Transfers	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit Fields
<input checked="" type="checkbox"/>	Inventory - Warehouse Hotshot Transfers	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit Fields

When clicking on the Edit Fields option next to a set of permissions, you will see the available options listed in the Field Rights pop-up window.

### Field Rights

<input type="checkbox"/>	Description ^
<input checked="" type="checkbox"/>	Commit Transfers
<input type="checkbox"/>	Commit Transfers from Central Kitchen
<input type="checkbox"/>	Commit Transfers from Warehouse

OK

Certain functions within the program do not require every option as a choice for selection.

If you do not select any boxes in the Feature area, users will not see that option at all within the program.

Allow All <input type="checkbox"/>	Feature	View Only	Allow Add	Allow Edit	Allow Delete	Edit Fields
<input type="checkbox"/>	Community - Recipes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
<input checked="" type="checkbox"/>	Ingredients - Maintenance	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

## Add a Security Group

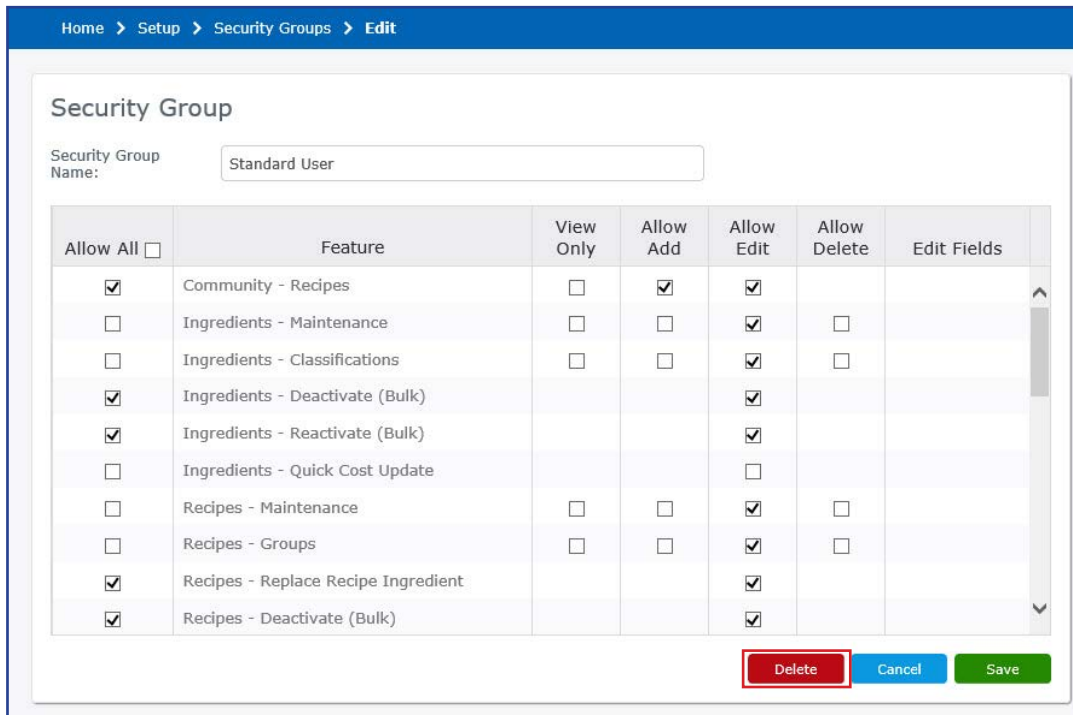
1. From the left-hand navigation bar, click **Setup**.
2. Click **Security Groups**.
3. Click **Add**.

4. Enter a name for the security group in the **Security Group Name** field.
5. Use the boxes in the table below to customize what permissions are allowed for the security group. In addition to the individual permissions on the right (View Only, Add, Edit, Delete, and Edit Fields), you can check the box on the left of the column to allow all permissions associated with the feature. Check the box next to "Allow All" to allow the security group permissions to all features simultaneously.
6. When finished, click **Save**.

Allow All <input type="checkbox"/>	Feature	View Only	Allow Add	Allow Edit	Allow Delete	Edit Fields
<input type="checkbox"/>	Community - Recipes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	Ingredients - Maintenance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Ingredients - Classifications	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Ingredients - Deactivate (Bulk)			<input type="checkbox"/>		
<input type="checkbox"/>	Ingredients - Reactivate (Bulk)			<input type="checkbox"/>		
<input type="checkbox"/>	Ingredients - Quick Cost Update			<input type="checkbox"/>		
<input type="checkbox"/>	Recipes - Maintenance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Recipes - Groups	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Recipes - Replace Recipe Ingredient			<input type="checkbox"/>		
<input type="checkbox"/>	Recipes - Deactivate (Bulk)			<input type="checkbox"/>		

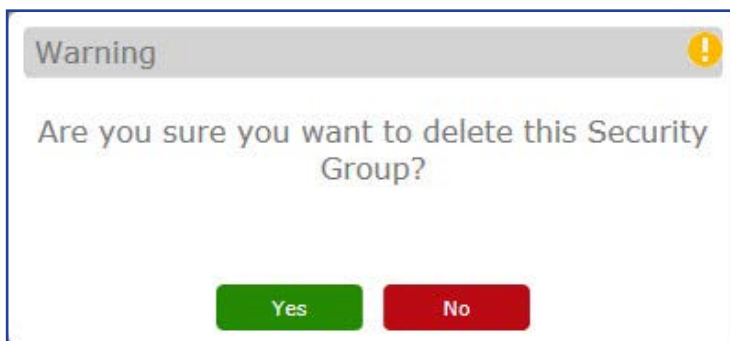
## Delete a Security Group

1. From the left-hand navigation bar, click **Setup**.
2. Click **Security Groups**.
3. You can search by name or you can just click **Search** to display all available security groups.
4. Click the name of the security group you want to delete.
5. Click **Delete**.



Allow All <input type="checkbox"/>	Feature	View Only	Allow Add	Allow Edit	Allow Delete	Edit Fields
<input checked="" type="checkbox"/>	Community - Recipes	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Ingredients - Maintenance	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Ingredients - Classifications	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Ingredients - Deactivate (Bulk)			<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	Ingredients - Reactivate (Bulk)			<input checked="" type="checkbox"/>		
<input type="checkbox"/>	Ingredients - Quick Cost Update			<input type="checkbox"/>		
<input type="checkbox"/>	Recipes - Maintenance	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Recipes - Groups	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	Recipes - Replace Recipe Ingredient			<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	Recipes - Deactivate (Bulk)			<input checked="" type="checkbox"/>		

6. Click **Yes** to delete the Security Group.



Warning

Are you sure you want to delete this Security Group?

Yes No

## Sites

It is important for you to review the sites in the program on a regular basis. You can add, modify, or deactivate sites under Setup.

### Add Sites

Note that there is a limit to how many sites may be added. This limit varies and has to do with your district setup, which can be viewed by clicking **District** on the Setup page. Once you have reached your site limit, the Add button will disappear and you will be unable to add sites.

1. Click **Setup**.
2. Click **Sites**.
3. Click **Add**.

4. In the General section, enter the Site Name and Site Code and select the Site Type. The Site # is automatically assigned and cannot be changed.  
Site Types include Administration, Central Kitchen, Food Preparation School, Storage Location, and Warehouse.
5. In the Address section, enter the site's address information.
6. In the Other section, enter the site's phone number and fax number, as well as the assigned IDs (district-assigned, state-assigned, and NCES).
7. In the Settings section, there are two Physical Counts options. These settings provide the ability to define physical count settings at the site level. Site level settings allow you to override the system settings and customize the site to a particular physical count.
  - a. From the Physical Counts - Blind Physical Counts drop-down select **Inherit**, **Yes**, or **No**.
    - **Inherit** (default) - Select **Inherit** to use the district wide system setting.
    - **Yes** - Select **Yes** if the system setting is set to No and you want to override that. Selecting Yes will not display the actual quantities when adding physical counts for the site.
    - **No** - Select **No** if the system setting is set to Yes and you want to override that. Selecting No will display the actual quantities when adding physical counts for the site.

- b. From the Physical Counts - Treat Blank Count Value as Zero drop-down select **Inherit**, **Yes**, or **No**.
- **Inherit** (default) - Select **Inherit** to use the district wide system setting.
  - **Yes** - Select **Yes** if the system setting is set to No and you want to override that. Selecting Yes will display a blank entry that equals zero when adding physical counts for the site.
  - **No** - Select **No** if the system setting is set to Yes and you want to override that. Selecting No will not display a blank entry that equals zero when adding physical counts for the site.
8. Click **Save**.

Home > Setup > Sites > Edit

### Site Information

#### General

Site #: 14

Site Name:

Site Code:

Site Type: Food Preparation School

#### Address

Street Address 1:

Street Address 2:

City:

State:

Zip Code:

#### Other

Phone Number:

Fax Number:

District Assigned ID:

State Assigned ID:

NCES ID:

#### Settings

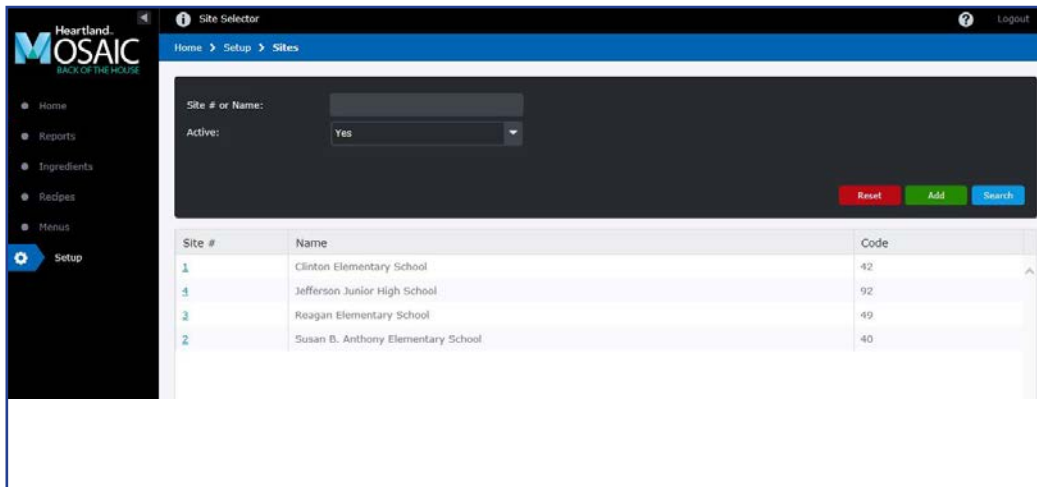
Physical Counts - Blind Physical Counts:

Physical Counts - Treat Blank Count Value as Zero:

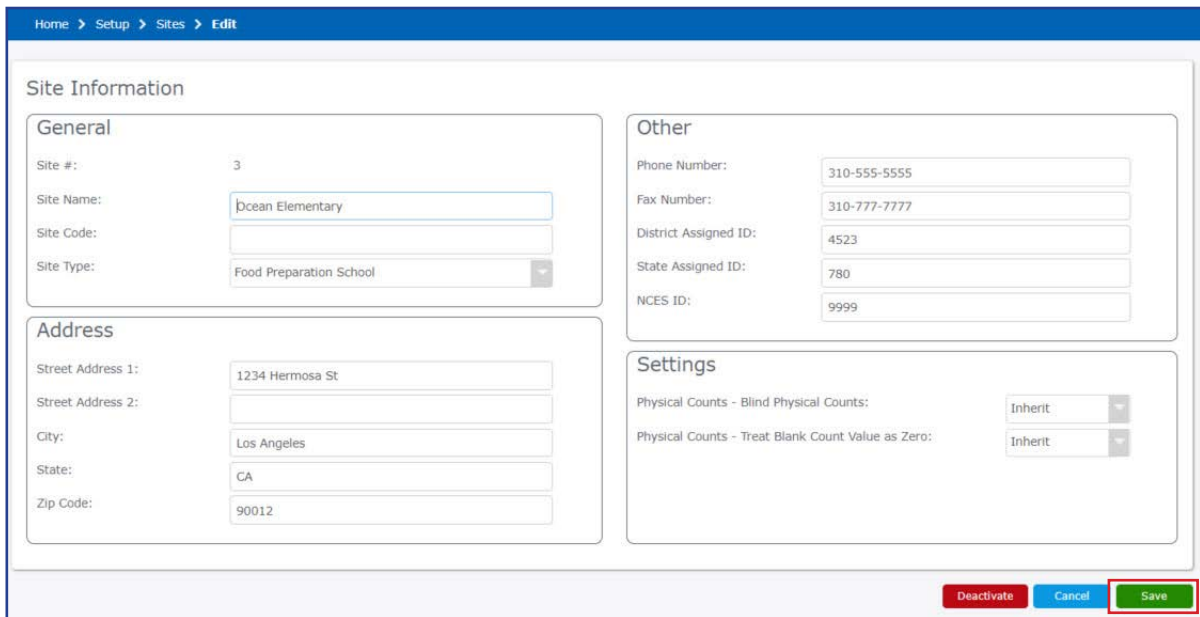


## Modify Sites

1. Click **Setup**.
2. Click **Sites**.
3. Enter a site name to find a specific site or leave the field blank for all sites.
4. Select **Yes** from the Active drop-down.
5. Click the **Site#** hyperlink, or double-click the Site Name to open the site.

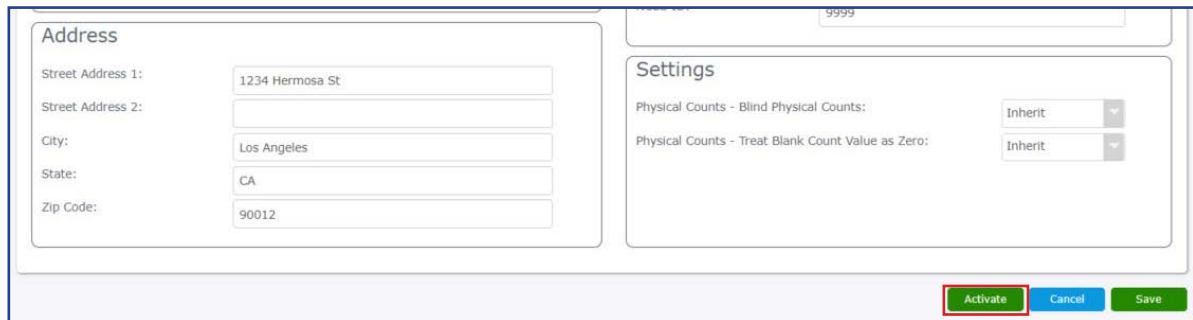


6. Type in the new or corrected site information.
7. Click **Save**.



## Activate Sites

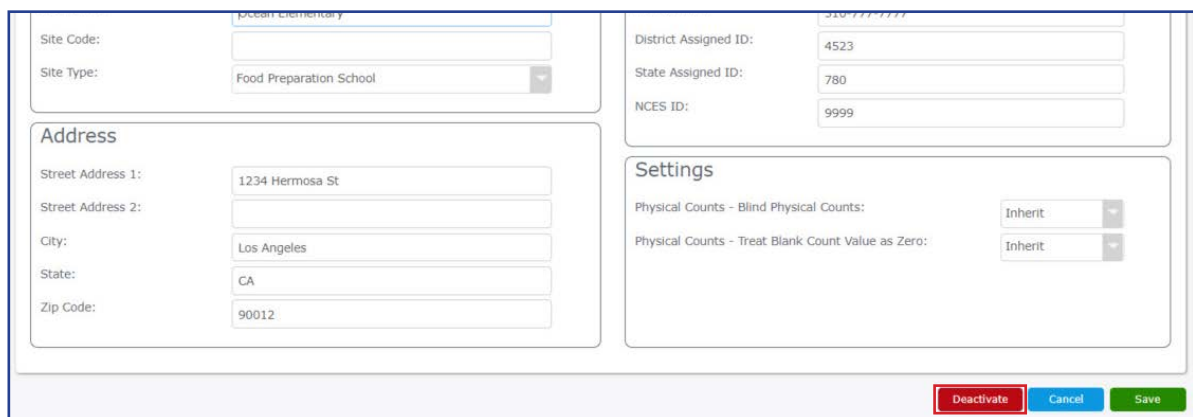
1. Click **Setup**.
2. Click **Sites**.
3. Enter a site name to find a specific site or leave the field blank for all sites. Make sure that the **Active** drop-down field is set either to **No** or **[blank]**. It is set to “Yes” by default, which excludes deactivated sites.
4. Click **Search**.
5. Click the **Site#** hyperlink, or double-click the Site Name to open the site.
6. Click **Activate**.



The screenshot shows a web form for activating a site. It is divided into two main sections: 'Address' and 'Settings'. The 'Address' section contains five input fields: 'Street Address 1' (filled with '1234 Hermosa St'), 'Street Address 2' (empty), 'City' (filled with 'Los Angeles'), 'State' (filled with 'CA'), and 'Zip Code' (filled with '90012'). The 'Settings' section contains two dropdown menus: 'Physical Counts - Blind Physical Counts' and 'Physical Counts - Treat Blank Count Value as Zero', both set to 'Inherit'. At the bottom right, there are three buttons: 'Activate' (highlighted with a red box), 'Cancel', and 'Save'.

## Deactivate Sites

1. Click **Setup**.
2. Click **Sites**.
3. Enter a site name to find a specific site or leave the field blank for all sites.
4. Click **Search**.
5. Click the **Site#** hyperlink, or double-click the Site Name to open the site.
6. To deactivate a site, click **Deactivate**.



The screenshot shows a web form for deactivating a site. It contains several input fields: 'Site Code' (empty), 'Site Type' (dropdown menu set to 'Food Preparation School'), 'District Assigned ID' (filled with '4523'), 'State Assigned ID' (filled with '780'), and 'NCES ID' (filled with '9999'). Below these are the 'Address' and 'Settings' sections, which are identical to the activation form. At the bottom right, there are three buttons: 'Deactivate' (highlighted with a red box), 'Cancel', and 'Save'.

## Site Groups

You can add, modify, or delete site groups under Setup. Site groups allow you to better manage users, menu items, and products by adding sites to groups that show up in searches and filters.

### Add Site Group

1. From the left-hand navigation bar, click **Setup**.
2. Click **Site Groups**.
3. Click **Add**.
4. Type a name in the Site Group Name field.
5. Click **Edit**.

Site Group Information

Site Group Name:

Sites Included:

Site #	Site Name ^	Site Code	Site Type	Active
--------	-------------	-----------	-----------	--------

6. Select the preferred search criteria or leave blank to display all sites.
7. Press **Enter** or click **Search**.
8. From the Search Results list, select the site check boxes, then click **Add**.

Site # or Name:  Site Type:

Site Code:  Active:

Search Results

<input checked="" type="checkbox"/>	Site #	Site Name ^	Site Code	Site Type	Active
<input checked="" type="checkbox"/>	5	Adams Elementary	Adams	Food Pr...	Yes
<input checked="" type="checkbox"/>	4	Central Kitchen	Rosey	Food Pr...	Yes
<input checked="" type="checkbox"/>	3	District Warehouse	DWare	Food Pr...	Yes
<input checked="" type="checkbox"/>	2	G W. Middle School	GWash	Food Pr...	Yes
<input checked="" type="checkbox"/>	8	Hamilton Elementary	Ham	Food Pr...	Yes
<input checked="" type="checkbox"/>	12	Head Start Test Facility		Food Pr...	Yes

Selected Sites

Site Name ^

The selected sites will move from Search Results to Selected Sites.

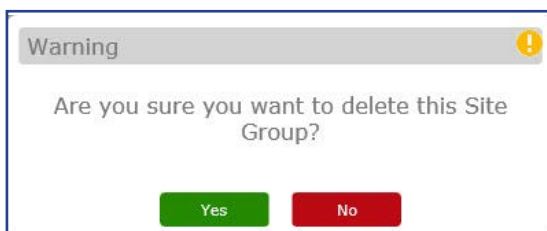
9. Click **Select**.
10. If you want to add additional sites to your site group, repeat Steps 6 - 8.
11. Click **Save**.

## Modify Site Group

1. From the left-hand navigation bar, click **Setup**.
2. Click **Site Groups**.
3. Enter the site group name or leave blank to display all site groups.
4. Press **Enter** or click **Search**.
5. Click the Site Group Name hyperlink, or double-click to open the site group.
6. Click **Edit**.
7. Select the preferred search criteria or leave blank for to display all sites.
8. Press **Enter** or click **Search**.
9. From the Search Results or the Selected Sites list, select the site check boxes, then click **Add or Remove**.
10. Click **Select**.
11. Click **Save**.

## Delete Site Group

1. From the left-hand navigation bar, click **Setup**.
2. Click **Site Groups**.
3. Enter the site group name or leave blank to display all site groups.
4. Press **Enter** or click **Search**.
5. Click the Site Group Name hyperlink, or double-click to open the site group.
6. Click **Delete**.
7. At the delete confirmation prompt, click **Yes**.



## SmartSense

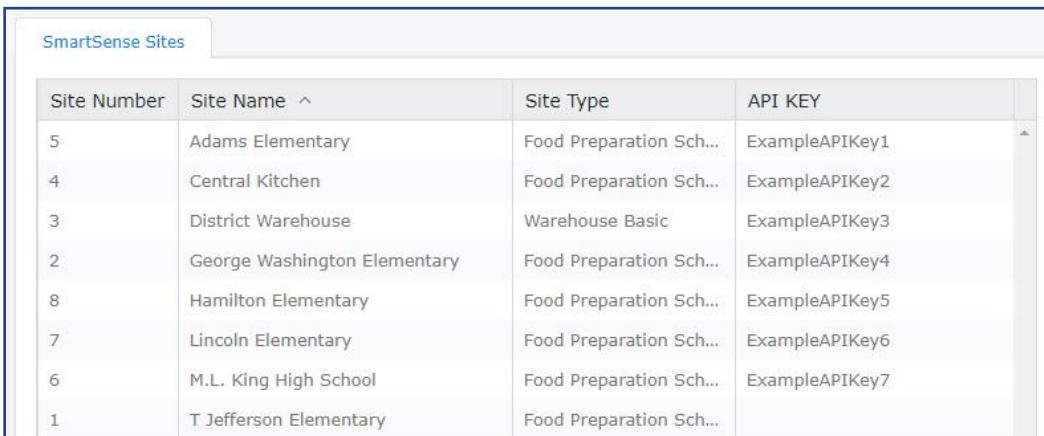
SmartSense provides tools to measure temperature and allow for safe preparation, storage, and serving through the SmartSense website. Mosaic offers integration between menu plans and SmartSense, allowing you to upload menu plan data from Mosaic to SmartSense.

Remember that you must first set permissions for users to access SmartSense by enabling the feature for their Security Group.



In order to upload to SmartSense, you will need to enter the API key provided by SmartSense.

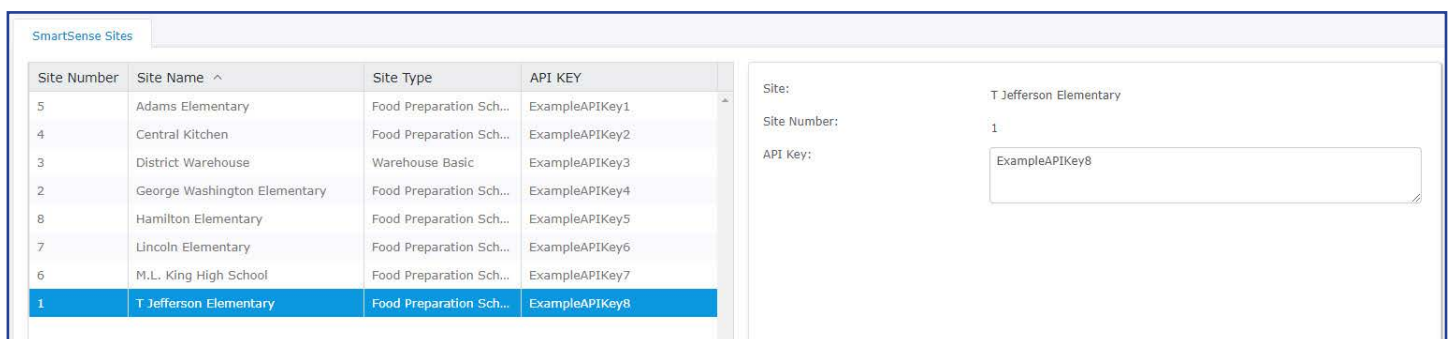
1. From the left-hand navigation bar, click **Setup**.
2. Click **SmartSense**.
3. Click the site that needs to have an API key entered or updated.



A screenshot of a table titled 'SmartSense Sites'. The table has four columns: 'Site Number', 'Site Name', 'Site Type', and 'API KEY'. The rows are numbered 1 through 8, with Site 1 highlighted in blue.

Site Number	Site Name	Site Type	API KEY
5	Adams Elementary	Food Preparation Sch...	ExampleAPIKey1
4	Central Kitchen	Food Preparation Sch...	ExampleAPIKey2
3	District Warehouse	Warehouse Basic	ExampleAPIKey3
2	George Washington Elementary	Food Preparation Sch...	ExampleAPIKey4
8	Hamilton Elementary	Food Preparation Sch...	ExampleAPIKey5
7	Lincoln Elementary	Food Preparation Sch...	ExampleAPIKey6
6	M.L. King High School	Food Preparation Sch...	ExampleAPIKey7
1	T Jefferson Elementary	Food Preparation Sch...	

4. Enter the API key in the API Key field. This key is provided by SmartSense.
5. Repeat steps 3 and 4 for every site that needs to upload to SmartSense.
6. Click **Save**.



After the API key has been entered, you will be able to upload data to SmartSense by using the Upload button on the Production Quantities page in Menus.

### Menu Planning

Setting Name	Description
Menus - Keep Planned Totals on Replace Recipe	Select <b>Yes</b> if you would like to replace an item on a menu without losing the Production Quantities that have already been entered. This function includes Menu Maintenance and Cycle Menus.
Recipes - Printing Recipes - Production Specifications Default Setting	Select <b>Yes</b> if you would like to make Production Specifications included by default on Recipe Prep Sheets and Recipe List/Print reports.

### Ordering & Inventory

Setting Name	Description
Exclude Inactive Products from Product Search	Select <b>Yes</b> if you would like to keep inactive products from appearing in product searches on the Receiving, Usage, Transfers, Requisition, and Warehouse Order pages.
Valuation Method	<p>The Valuation Method system setting allows you to choose which costing method you would like to use so that your reports align with your accounting practices for tracking cost of goods. Select one of the following values:</p> <ul style="list-style-type: none"> <li>• <b>Actual Value/FIFO</b> (default) - The most commonly used inventory valuation method is first-in first-out (FIFO). When using the FIFO method, the value of each individual item is equal to the original purchase cost for that item. The value of an individual item will remain static. When all of the inventory items purchased at the oldest cost are used, the item with the next oldest cost will be used after that.</li> <li>• <b>Current Value</b> – The current valuation method is sometimes referred to as replacement value. Each individual item is assigned a value based on the current purchase price, regardless of the original purchase cost. The value of an individual item will vary as purchase price changes.</li> <li>• <b>Weighted Average Value</b> – The weighted average method assigns inventory values by calculating a moving average of all inventory purchase costs. Each individual item is assigned the same value based on the average cost of each of the remaining items. The value of an individual item will vary as inventory is used and received.</li> </ul> <p><b>Note:</b> If you have existing transactions (adjustments, receipts, transfers, or withdrawals), you will not be able to change this setting.</p>
Inventory - Allow Automatic Commit of Receiving for Transfer Transactions	Select <b>Yes</b> if you would like to make transfers committed by the sending site be automatically received into inventory. If enabled, this setting allows for the transfers to be committed regardless of the user's site permissions.
Inventory - Allow Partial Stock Units	Select <b>Yes</b> if you would like to allow for Stock Units in inventory to have partial counts entered to reflect partial amounts of their unit of measure (for example, adding 0.5 to indicate half of a Case left in inventory).
Inventory - Allow Quantity on Hand to be Negative for Usage Transactions	Select <b>Yes</b> if you would like to allow usage transactions to be committed where the resulting quantity on hand will be a negative value.

# ■ SETUP

Setting Name	Description
Ordering - Allow Stock Units on Warehouse Orders	Select <b>Yes</b> if you would like to allow for Stock Units to be used in addition to Purchase Units when entering counts for Warehouse Orders.
Ordering - Allow Vendor Order Export Prior to Approval	Select <b>Yes</b> if you would like to allow users to export a Vendor Order at the Submitted stage, prior to approval.
Physical Counts - Blind Physical Counts	Select <b>Yes</b> if you do not want to display the actual quantities when adding physical counts.
Physical Counts - Treat Blank Count Value as Zero	Select <b>Yes</b> if you want a blank entry to equal zero.
Reports - Inventory - Two decimals in Extended Cost and Totals	Select <b>Yes</b> if you would like to limit the Total and Extended Cost dollar amounts to 2 decimal places. This affects the Inventory on Hand and Inventory Transactions reports.
Requisitions - Allow Orders to Exceed Central Kitchen on Hand Quantity	Select <b>Yes</b> if you would like orders to be placed regardless of the available quantity at the Central Kitchen. If <b>No</b> is selected, users will be informed that the quantity on hand exceeds the quantity they have requested and they will not be allowed to proceed with their order.
Requisitions - Show Quantity on Hand for Products with Central Kitchen Fulfillment	Select <b>Yes</b> if you would like to enable the Quantity on Hand column in the order to show the quantity on hand for any products that have their fulfillment site set to Central Kitchen.
Usage - Import Menus Quantity Method	<p>The Usage - Import Menus Quantity Method allows you to establish a usage type when importing counts from production to inventory usage.</p> <ul style="list-style-type: none"> <li>• <b>Planned</b> - Planned production quantities are imported.</li> <li>• <b>Offered</b> - By default, offered production quantities are imported.</li> <li>• <b>Served</b> - Served production quantities are imported.</li> </ul>

## Usage Reasons

You can add or delete usage reasons under Setup. Access to the **Setup > Usage Reasons** is controlled through the security group, **Setup - Usage Reasons**. Please refer to the Setup section, Security Groups topic to provide users the appropriate access to the Usage Reasons feature.

### Adding a Usage Reason

Perform the following procedure to add a Usage Reason.

1. From the left-hand navigation bar, click **Setup**.
2. Click **Usage Reasons**.
3. Click **Add**.



4. Type the new exception in the top row of the grid and then press **Enter**.



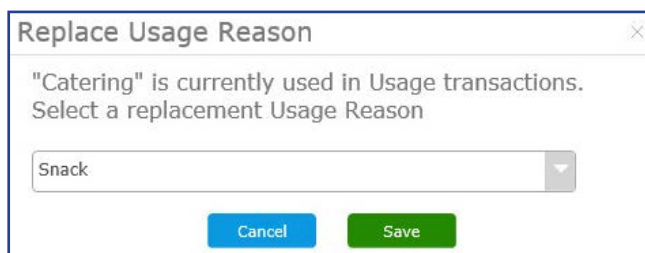
### Deleting a Usage Reason

Perform the following procedure to delete a Usage Reason.

1. From the left-hand navigation bar, click **Setup**.
2. Click the **Usage Reasons** you would like to delete.
3. Click **Delete**.
4. At the delete confirmation prompt, click **Yes**.

If the usage reason is in use you are prompted to select a replacement. Select the replacement reason and click **Save**.

**Note:** This change will be applied retroactively to existing transactions.



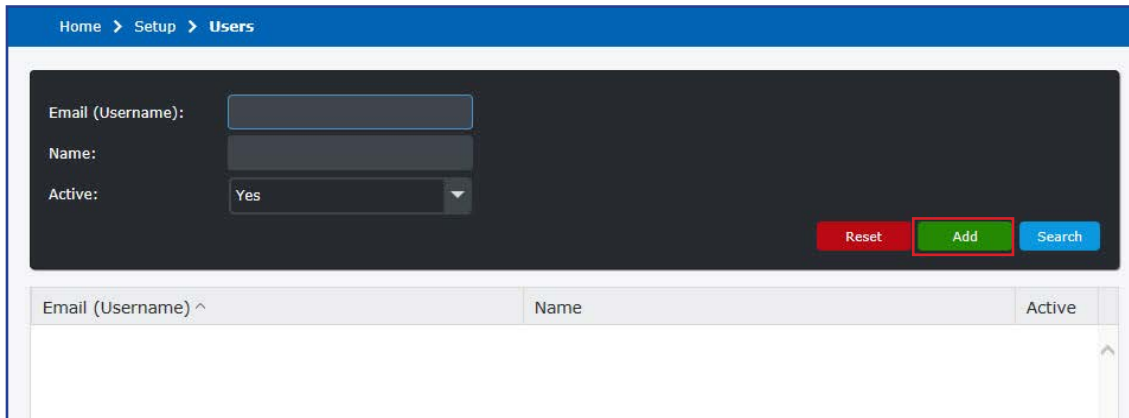


## Users

It is important for you to review the users of the program on a regular basis. You can add, manage, or deactivate users from the Setup menu.

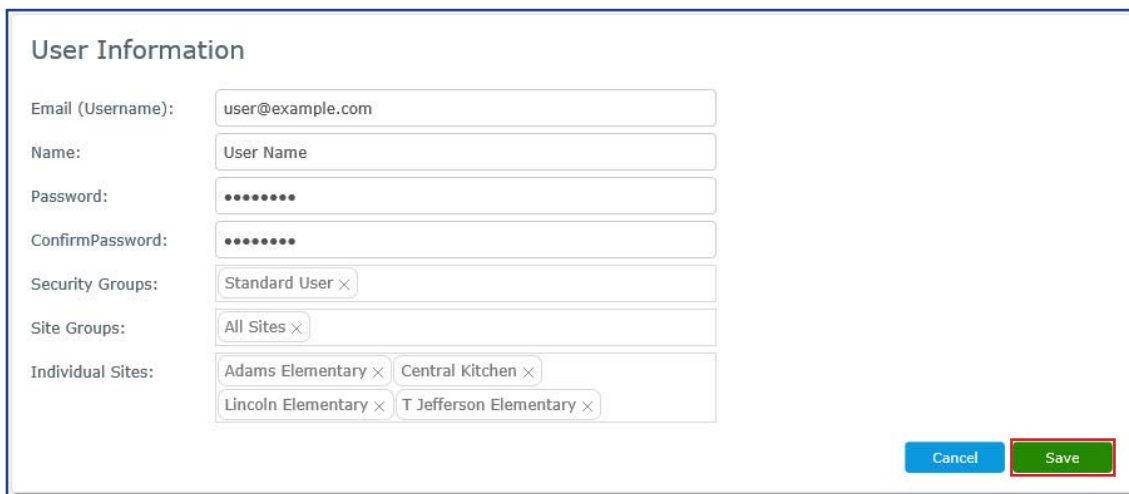
### Add Users

1. From the left-hand navigation bar, click **Setup**.
2. Click **Users**.
3. Click **Add**.



The screenshot shows a web interface for adding users. At the top, there is a breadcrumb trail: Home > Setup > Users. Below this is a form with three input fields: 'Email (Username)', 'Name', and 'Active'. The 'Active' field is a dropdown menu with 'Yes' selected. To the right of the form are three buttons: 'Reset' (red), 'Add' (green), and 'Search' (blue). Below the form is a table with columns for 'Email (Username)', 'Name', and 'Active'.

4. Type an email address into the **Email (Username)** field.
5. Enter a Name and Password for the user.
6. Enter or select from the drop-down menu a Security Group for the user. This will determine their permissions.
7. Enter or select from the drop-down menu site groups for the user. The user will have access to all sites within their site groups.
8. Enter or select from the drop-down menu individual sites for the user. Sites can be assigned in addition to site groups.
9. Click **Save**.



The screenshot shows a 'User Information' form. It has several fields: 'Email (Username)' with the value 'user@example.com', 'Name' with 'User Name', 'Password' and 'ConfirmPassword' both masked with dots, 'Security Groups' with 'Standard User', 'Site Groups' with 'All Sites', and 'Individual Sites' with four selected sites: 'Adams Elementary', 'Central Kitchen', 'Lincoln Elementary', and 'T Jefferson Elementary'. At the bottom right, there are two buttons: 'Cancel' (blue) and 'Save' (green).

## Add Users from Another District

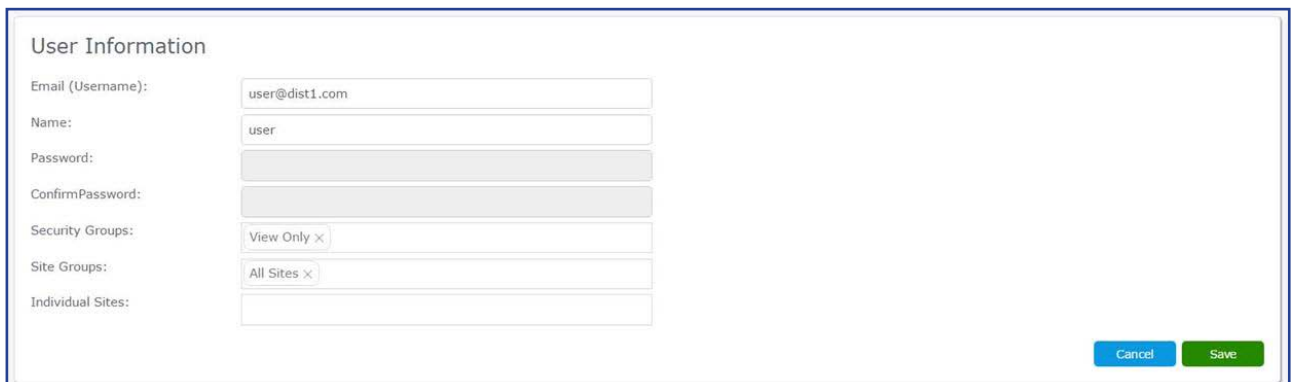
If a user already exists in Mosaic in another district, you have the option to add that user directly from their home district to your district. This allows you to give access to users that need permissions across multiple districts, such as state reviewers or members of a food service management company.

To add a user that exists in multiple districts, perform the following steps:

1. From the left-hand navigation bar, click **Setup**.
2. Click **Users**.
3. Click **Add**.
4. Enter the user's email address in the **Email (Username)** field.
5. A warning pop-up will appear letting you know that this email/username already exists in another district. Click **Yes** to add this user to your district.

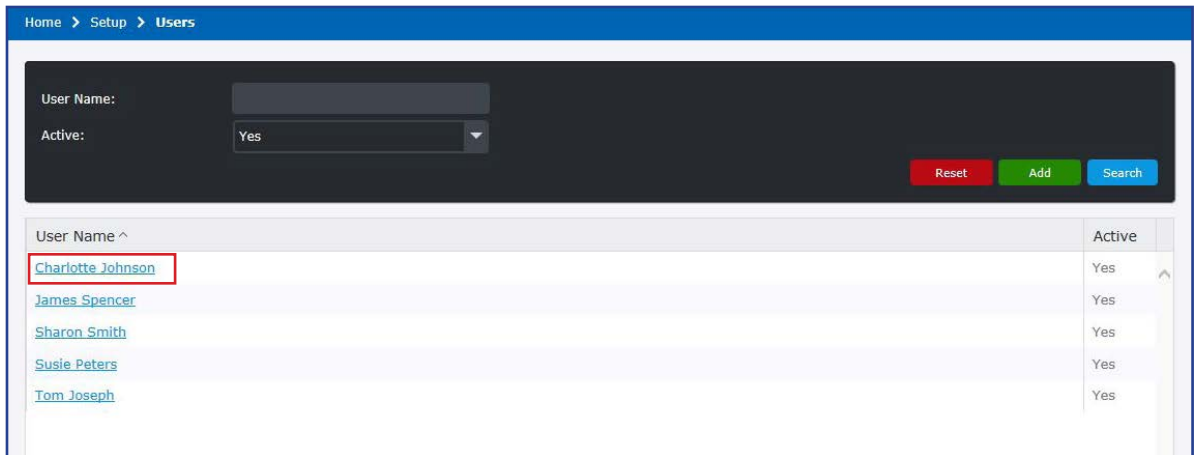


6. The **Email (Username)** and **Name** fields will be filled automatically based on the user's information from the source district. The **Password** and **Confirm Password** fields are not editable since that information will be taken from the source district.
7. Enter or select from the drop-down menu a Security Group for the user. This will determine their permissions.
8. Enter or select from the drop-down menu site groups for the user. The user will have access to all sites within their site groups.
9. Enter or select from the drop-down menu individual sites for the user. Sites can be assigned in addition to site groups.
10. Click **Save**.

A form titled "User Information" with several input fields. The fields are: "Email (Username):" with the value "user@dist1.com"; "Name:" with the value "user"; "Password:" (disabled); "ConfirmPassword:" (disabled); "Security Groups:" with a dropdown menu showing "View Only x"; "Site Groups:" with a dropdown menu showing "All Sites x"; and "Individual Sites:" (empty). At the bottom right, there are two buttons: "Cancel" and "Save".

## Modify Users

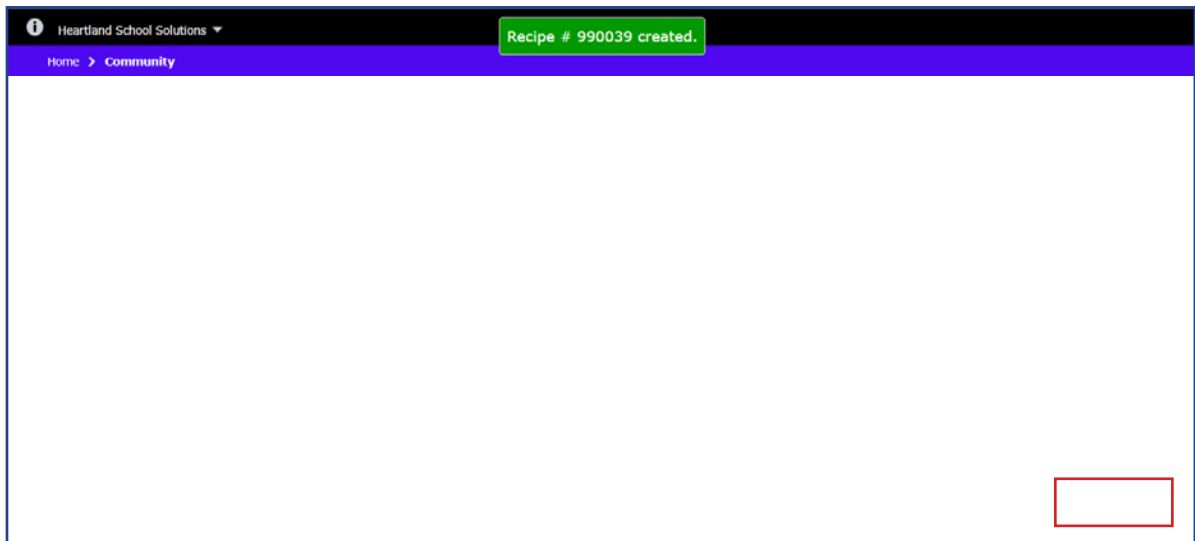
1. From the left-hand navigation bar, click **Setup**.
2. Click **Users**.
3. Enter a user name to find a specific user or leave the field blank for all users.
4. Select **Yes** from the Active drop-down.
5. Select the user's name you wish to modify, by clicking on the user name hyperlink.



The screenshot shows the 'Users' management page. At the top, there is a breadcrumb trail: Home > Setup > Users. Below this is a search form with two fields: 'User Name:' and 'Active:'. The 'Active:' dropdown is set to 'Yes'. To the right of the form are three buttons: 'Reset' (red), 'Add' (green), and 'Search' (blue). Below the form is a table with the following data:

User Name ^	Active
<a href="#">Charlotte Johnson</a>	Yes
<a href="#">James Spencer</a>	Yes
<a href="#">Sharon Smith</a>	Yes
<a href="#">Susie Peters</a>	Yes
<a href="#">Tom Joseph</a>	Yes

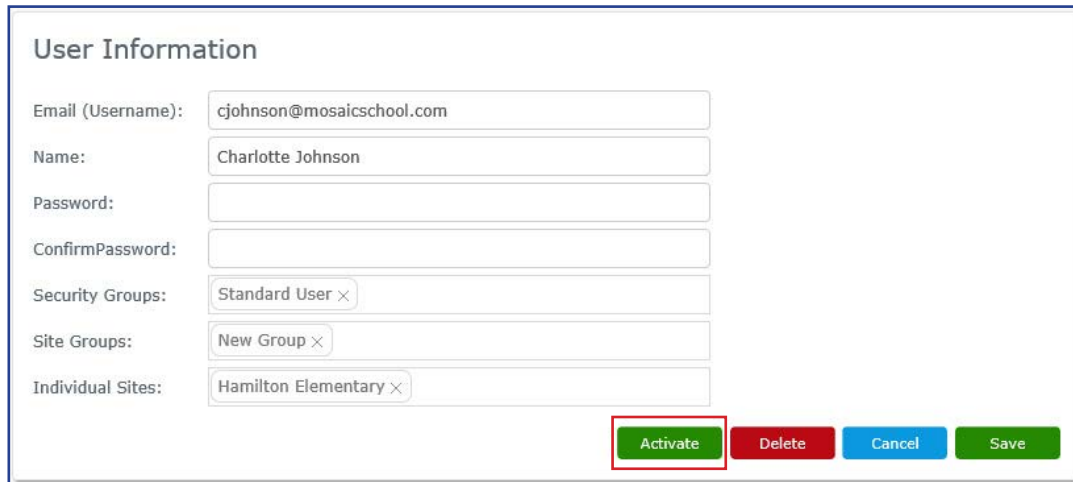
6. Edit any information that requires changing, such as a new password or different security groups.
7. When finished, click **Save**.



The screenshot shows the 'Community' page. At the top, there is a breadcrumb trail: Home > Community. A green notification box at the top center says 'Recipe # 990039 created.' Below the breadcrumb trail is a large empty white area. In the bottom right corner of this area, there is a red rectangular box, likely representing a 'Save' button.

## Activate Users

1. From the left-hand navigation bar, click **Setup**.
2. Click **Users**.
3. Enter in the first few characters of the user's name, and click **Search** or click **Search** without entering anything to generate a list of all users. Make sure that the **Active** drop-down field is set either to **No** or **[blank]**. It is set to "Yes" by default, which excludes deactivated users.
4. Select **Yes** from the Active drop-down.
5. Click **Activate**.



The screenshot shows a 'User Information' form with the following fields and values:

- Email (Username): cjohnson@mosaicsschool.com
- Name: Charlotte Johnson
- Password: (empty)
- ConfirmPassword: (empty)
- Security Groups: Standard User x
- Site Groups: New Group x
- Individual Sites: Hamilton Elementary x

At the bottom right of the form, there are four buttons: **Activate** (green), **Delete** (red), **Cancel** (blue), and **Save** (green). The **Activate** button is highlighted with a red rectangular box.

## Deactivate Users

1. From the left-hand navigation bar, click **Setup**.
2. Click **Users**.
3. Enter in the first few characters of the user's name, and click **Search** or click **Search** without entering anything to generate a list of all users.
4. Select **Yes** from the Active drop-down.
5. Click the **user's name** hyperlink, or double-click the name to open the user information.
6. To deactivate a user, click **Deactivate**.



The screenshot shows a large, mostly empty rectangular area representing a user information form. At the bottom right corner of this area, there is a small red rectangular box, which is intended to highlight the 'Deactivate' button as per the instructions in the adjacent list.

## Managing Vendors

Vendor information is used to manage the vendors that distribute supplies to your organization. From this menu, you can add, edit descriptions, view, and delete vendors. The user must be assigned to the appropriate **Setup - Vendors** security group settings to manage vendors. Refer to the following procedures for instructions to manage vendor information.

### Vendor Maintenance (Search)

You can add and modify vendor information, including address, phone, and email, as well as contacts.

To review or modify an existing vendor, perform the following steps.

1. From the left-hand navigation bar, click **Setup**.
2. Click **Vendors**.
3. Enter a specific abbreviation or description or leave the field blank for all vendors.
4. Click **Search**.
5. Click the vendor abbreviation hyperlink.

Vendor Abbreviation	Vendor Name	Active
<a href="#">BD4</a>	BD4 Distributing, Inc	Yes
<a href="#">BEK</a>	Ben E. Kelth	Yes
<a href="#">Cool2</a>	Cooler 2 @ Adams Elementary	Yes
<a href="#">F&amp;A</a>	F&A Food Sales, Inc	Yes
<a href="#">Gage</a>	Gage Foods	Yes
<a href="#">Hiland</a>	Hiland Dairy Co.	Yes
<a href="#">MM</a>	Moo Moo dairy	Yes
<a href="#">REV</a>	Revolution Foods	Yes
<a href="#">SYS</a>	Sysco	Yes
<a href="#">test</a>	test	Yes
<a href="#">TEST</a>	TEST Vendor	Yes
<a href="#">USF</a>	US Foods	Yes
<a href="#">USDA</a>	USDA Commodities	Yes

## Add Vendors

1. From the left-hand navigation bar, click **Setup**.
2. Click **Vendors**.
3. Click **Add**.
4. Enter the information for the vendor on the General tab.
  - a. Type a new vendor abbreviation. The abbreviation must be unique and has a ten character limit.
  - b. Enter the vendor name.
  - c. If desired, select the appropriate Vendor Rating based on your assessment of the vendor's service. The five-star rating system provides you the ability to compare and select vendors based on your rating.
  - d. If desired, enter the number of business days the vendor requires to process and deliver an order. When an order is submitted, a validation will occur to compare the selected delivery date to ensure that there are enough days to meet the desired delivery date.
  - e. If desired, enter the vendor's minimum order amount. When an order is submitted a validation will occur to ensure that the minimum amount has been met.
  - f. When placing a vendor order, you will be given the option to export the order. A file will be generated in the specified layout for a number of stock export settings for specific vendors. If desired, select the appropriate vendor from the Order Export Template drop-down to indicate the format to use when performing a vendor export.  
**Note:** If you do not select an Order Export Template, the export functionality will not be available for any orders made to this vendor.
  - g. Enter the vendor instructions, if applicable. Use this field to provide detailed information to the vendor (e.g. specific requests, directive in regards to orders or invoicing).
  - h. Enter the District Customer Number. This is the number that a vendor uses to uniquely identify your school district as a customer.
  - i. Enter the appropriate address, phone, email, and website information.
5. Click **Save**.

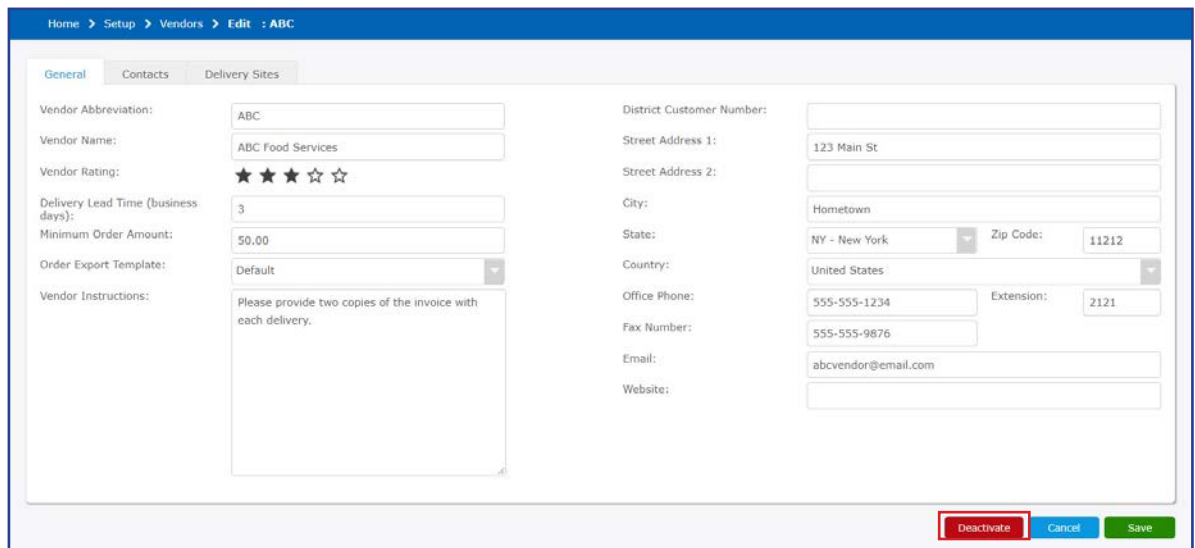
6. Upon completion, a success prompt displays.

Vendor saved successfully

## Deactivate Vendors

To hide vendors you no longer want to display in your database, perform the following steps.

1. From the left-hand navigation bar, click **Setup**.
2. Click **Vendors**.
3. Enter a specific abbreviation or description or leave the field blank for all vendors.
4. Click **Search**.
5. Click the vendor abbreviation hyperlink.
6. Click **Deactivate**.



7. Click **Save**.
8. Upon completion, a vendor deactivation prompt displays.

**Vendor Deactivated**

## Activate Vendors

To reactivate vendors in your database, perform the following steps.

1. From the left-hand navigation bar, click **Setup**.
2. Click **Vendors**.
3. Enter a specific abbreviation or description or leave the field blank for all vendors.
4. On the Active drop-down menu, select **No**.
5. Click **Search**.
6. Click the vendor abbreviation hyperlink.
7. Click **Activate**.
8. Click **Save**.

Home > Setup > Vendors > Edit : VND

General Contacts Delivery Sites

Vendor Abbreviation: VND

Vendor Name: Vendor

Vendor Rating: ★★★★★

Delivery Lead Time (business days): 3

Minimum Order Amount: 50.00

Order Export Template:

Vendor Instructions: Please provide two copies of the invoice with each delivery.

District Customer Number:

Street Address 1: 123 Main Street

Street Address 2:

City: Anywhere

State: NY - New York Zip Code: 11212

Country: United States

Office Phone: 585-555-1212 Extension: 1212

Fax Number: 585-555-1000

Email: vendor@email.com

Website:

Upon completion, the vendor activation prompt displays.

**Vendor Deactivated**



## Contacts Tab

The Contacts tab can store information for a vendor. This can assist when working with bids and purchase orders. You can add, edit descriptions, view, and delete contacts.

### Add Contact

1. From the left-hand navigation bar, click **Setup**.
2. Click **Vendors**.
3. Enter a specific abbreviation or description or leave the field blank for all vendors.
4. Click **Search**.
5. Click the vendor abbreviation hyperlink.
6. Click **Contacts** tab.
7. Click **Add Contact**.
8. Enter the appropriate contact information.  
By default, the Use Vendor Address check box is selected. This automatically populates the address information with the address on the General tab. If you remove the check box selection, the address is cleared.
9. Click **OK**.

**Add Vendor Contact** [X]

First Name: Jackie

Last Name: Hall

Job Title: General Manager

Use Vendor Address

Street Address 1: 123 Main Street

Street Address 2:

City: Anywhere

State: NY - New York Zip Code: 11212

Country: United States

Office Phone: 585-227-1212 Extension: 3013

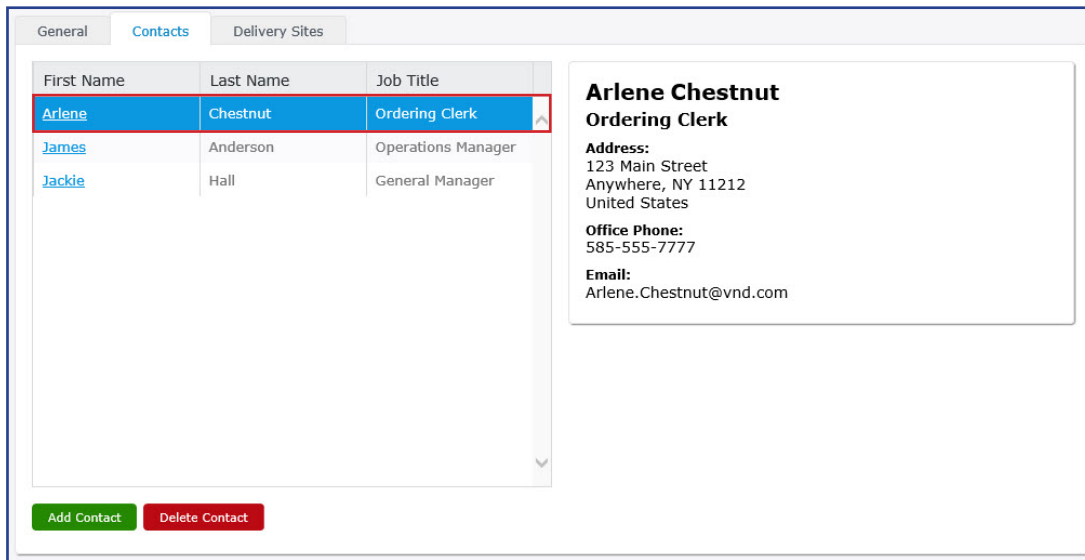
Mobile Phone: Fax Number:

Email: Jackie.Hall@vnd.com

Cancel OK

## View Contact

1. From the left-hand navigation bar, click **Setup**.
2. Click **Vendors**.
3. Enter a specific abbreviation or description or leave the field blank for all vendors.
4. Click **Search**.
5. Click the vendor abbreviation hyperlink.
6. Click the **Contacts** tab.
7. Click on the row in the contact grid to view the contact information.



The screenshot displays a software interface for viewing contact information. At the top, there are three tabs: 'General', 'Contacts', and 'Delivery Sites'. Below the tabs is a table with three columns: 'First Name', 'Last Name', and 'Job Title'. The table contains three rows of data. The first row, 'Arlene Chestnut', is highlighted with a blue background and a red border. To the right of the table is a detailed view for the selected contact, 'Arlene Chestnut', including her address, office phone number, and email address. At the bottom of the interface, there are two buttons: 'Add Contact' (green) and 'Delete Contact' (red).

First Name	Last Name	Job Title
Arlene	Chestnut	Ordering Clerk
James	Anderson	Operations Manager
Jackie	Hall	General Manager

**Arlene Chestnut**  
**Ordering Clerk**

**Address:**  
123 Main Street  
Anywhere, NY 11212  
United States

**Office Phone:**  
585-555-7777

**Email:**  
Arlene.Chestnut@vnd.com

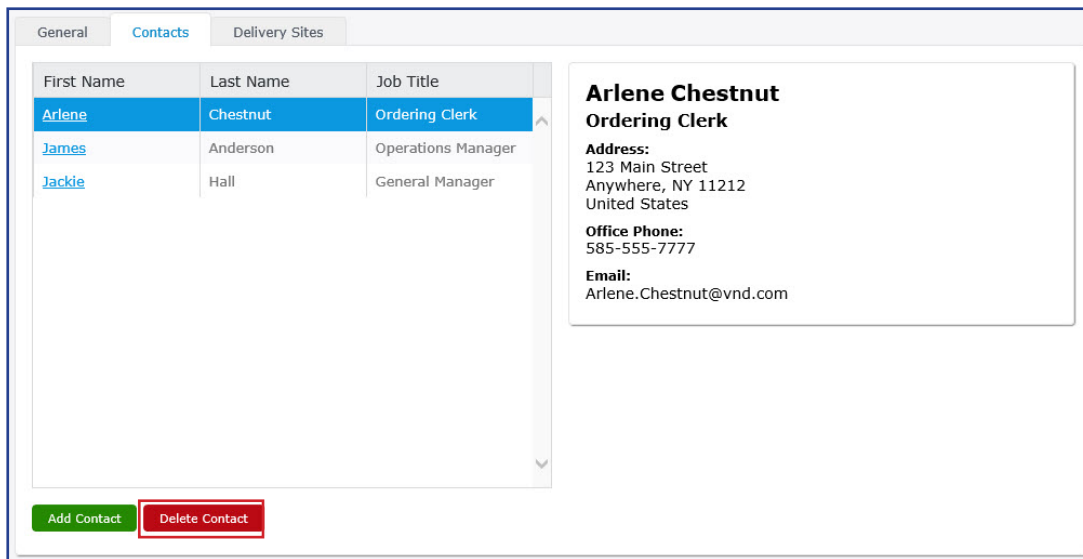
[Add Contact](#) [Delete Contact](#)

## Edit Contact

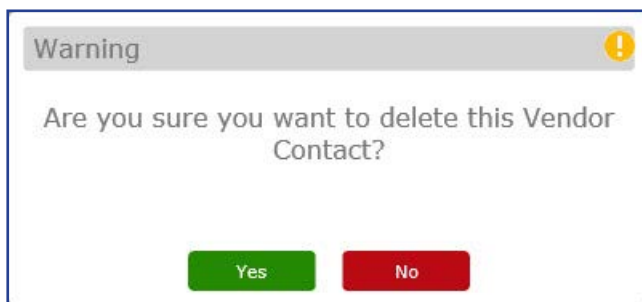
1. From the left-hand navigation bar, click **Setup**.
2. Click **Vendors**.
3. Enter a specific abbreviation or description or leave the field blank for all vendors.
4. Click **Search**.
5. Click the vendor abbreviation hyperlink.
6. Click the **Contacts** tab.
7. Click the first name of the contact that you want to edit.
8. Modify the desired information. This edit screen is very similar to the one when adding a new contact.
9. Click **OK** to save the modified information.

## Delete Contact

1. From the left-hand navigation bar, click **Setup**.
2. Click **Vendors**.
3. Enter a specific abbreviation or description or leave the field blank for all vendors.
4. Click **Search**.
5. Click the vendor abbreviation hyperlink.
6. Click the **Contacts** tab.
7. Click on the row in the contact grid highlighting the contact that you want to delete.
8. Click **Delete Contact**.



9. Click **Yes** to confirm the deletion of the contact.



10. Upon completion the **Vendor Contact Deleted** prompt displays.

**Vendor Contact Deleted Successfully**

## Delivery Sites Tab

The Delivery Sites tab allows you to track customer numbers for each site and vendor. This gives the ability to enter vendor-assigned customer numbers for each site, the expected delivery schedule, and delivery instructions on an order, which will display on the Purchase Order report. The listed sites are determined by the user's assigned site groups, which can be found under **Setup > Users**.

Perform the following steps to add or modify delivery site information.

1. From the left-hand navigation bar, click **Setup**.
2. Click **Vendors**.
3. Enter a specific abbreviation or description or leave the field blank for all vendors.
4. Click **Search**.
5. Click the vendor abbreviation hyperlink.
6. Click the **Delivery Sites** tab.
7. Select the desired site.
8. Enter the necessary information in the Customer Number and Delivery Instructions fields.
9. Enter a Delivery Schedule. When creating a new vendor, the schedule will default to Monday through Friday.
  - a. To remove a day, click the X.
  - b. To add a day, click within the Delivery Schedule field and select the appropriate day from the drop-down.
10. Repeat steps 7-9 for each site you would like to edit. Data in the Customer Number, Delivery Instructions, and Delivery Schedule fields should save automatically after clicking away from them, and a "Saved" message will appear above the updated field.

The screenshot displays the 'Delivery Sites' tab in a software application. On the left, a table lists various sites. The site 'Adams Elementary' is selected, and its details are shown in the form on the right. The form includes fields for Site Name, Site Number, Customer Number, Delivery Instructions, and Delivery Schedule. A green 'Saved!' message is visible above the Site Number field.

Site Nu...	Site Name	Site Type	Customer Number
5	Adams Elementary	Food Preparation...	123456
4	Central Kitchen	Food Preparation...	
3	District Warehouse	Warehouse	
2	George Washington Elemen...	Food Preparation...	
8	Hamilton Elementary	Food Preparation...	
7	Lincoln Elementary	Food Preparation...	
6	M.L. King High School	Food Preparation...	
1	T Jefferson Elementary	Food Preparation...	

Site: Adams Elementary  
 Site Number: 5  
 Customer Number: 123456  
 Delivery Instructions: Please deliver to Receiving Bay #2 and ring the doorbell.  
 Delivery Schedule: Monday X Tuesday X Wednesday X Thursday X Friday X

# SUPPORT

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## Contact Information

### Phone

For additional support, please contact Technical Support between the hours of 7 AM EST and 7 PM EST at 800-256-8224, option 1.

### Email

mosaicssupport@e-hps.com

### Support Central

For the most up-to-date help and support information, please visit our new library of articles at:

<https://help.heartlandschoolsolutions.com/>

# APPENDIX

## Certification of Compliance

There are several areas in Mosaic that require setup for meal pattern analysis. This section provides instructions to properly set up the Mosaic software to define meals per the Healthy Hunger Free Kids Act (HHFKA) requirements.

### Contributions - Adding Components

Contributions must be added to a recipe. Perform the following procedure to set up recipe components.

1. From the left-hand navigation bar, click **Recipes**.
2. Click **Maintenance**.
3. In the Recipe # or Description search field, enter the first few characters of the recipe name and click **Search**.
4. Click the hyperlink in the Recipe # column, or double click to open the recipe.
5. Click **Components** tab.

Recipe #	Description	Portions	Group	Source
<a href="#">233</a>	CRACKERS, GRAHAM	1 (4 EACH)	BREAD/ROLLS/STARCH	
<a href="#">1048</a>	HAM SANDWICH	1 EACH	SANDWICHES	
<a href="#">161</a>	HAMBURGER ON A BUN	1 SERVING	ENTREES	
<a href="#">500300</a>	STIR FRY-RICE EGGS & HAM	50 CUP	ENTREES	USDA D-57r
<a href="#">500193</a>	TOASTED TURKEY HAM & CHEESE	50 SERVINGS	SANDWICHES	USDA F-07A

6. Enter the contribution amount for each Component type - Meat/Meat ALT, Grains, Fruit, Vegetable, and Milk (Milk Type).
  - Enter Meat/Meat ALT and Grain in ounce equivalents.
  - If the Meat/Meat ALT is to be counted as a grain during breakfast, select the **Count as Grain during Breakfast** check box.
  - Enter Fruits, Vegetables, and Milk in cup equivalents.
  - Choose the appropriate milk type from the Milk Type drop-down.

**Note:** The program will automatically round to the nearest creditable amount.

### Adding Subgroups

Food Based Components

Meat/ALT:  oz eq

Count as Grain During Breakfast

Grains:  oz eq

Fruit:  cup

Vegetable:  cup

Milk:  cup

Milk Type:

Per USDA guidelines food based components measured in CUPS are creditable to the nearest 1/8 CUP and those measured in OZ are creditable to the nearest 1/4 OZ. The program will automatically round down to the next creditable portion.

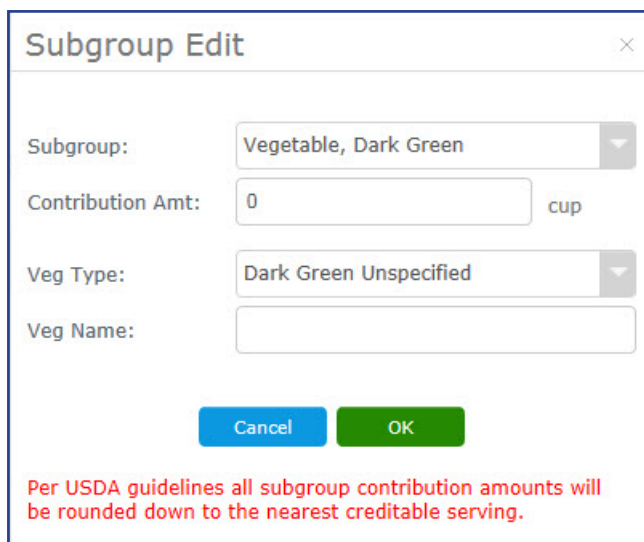
## APPENDIX

Subgroups are used to further define each contribution. There is no limit to the number of Subgroups that can be added. Perform the following procedure to add a subgroup.

1. Under the Subgroups section, click **Add**.
2. Choose the appropriate subgroup from the **Subgroup** drop-down.
3. Enter the contribution amount.

**Note:** All subgroup contribution amounts are rounded down to the nearest creditable serving.

- a. When adding a Vegetable subgroup (with the exception of Vegetable Juice) the Vegetable Type drop-down displays.
  - b. If the selected Vegetable type is an unspecified type, the vegetable name field displays. Type the name of the Unspecified Vegetable.
4. Click **OK**.



The screenshot shows a dialog box titled "Subgroup Edit" with a close button (X) in the top right corner. It contains the following fields and controls:

- Subgroup:** A dropdown menu with "Vegetable, Dark Green" selected.
- Contribution Amt:** A text input field containing "0" and a unit dropdown menu set to "cup".
- Veg Type:** A dropdown menu with "Dark Green Unspecified" selected.
- Veg Name:** An empty text input field.

At the bottom of the dialog are two buttons: "Cancel" (blue) and "OK" (green). Below the buttons, a red text note reads: "Per USDA guidelines all subgroup contribution amounts will be rounded down to the nearest creditable serving."

5. Once all Components and Subgroups have been added to the Recipe, click **Save**.

# APPENDIX

## Reimbursable Meal Groups

Reimbursable meal groups are created to define the set of items that make up reimbursable meals to be offered on menu plans. Reimbursable meal groups are analyzed to confirm that all minimum component contributions have been met. In order to set up reimbursable meal groups, you must have breakfast and lunch menu types and nutrient standards setup according to serving period and age group.

Menu # ^	Menu Name	Serving Period	Active	Grade/Age Group	
1	Breakfast HHFKA K-5	Breakfast	Yes	K-5 (age 5-10)	<a href="#">Setup</a>
2	Test Menu	Lunch	Yes	9-12 (age 14-18)	<a href="#">Setup</a>
3	HHFKA Lunch K-5	Lunch	Yes	K-5 (age 5-10)	<a href="#">Setup</a>
4	HHFKA Lunch 6-8	Lunch	Yes	6-8 (age 11-13)	<a href="#">Setup</a>
5	HHFKA Lunch 9-12	Lunch	Yes	9-12 (age 14-18)	<a href="#">Setup</a>
6	HHFKA Lunch K-8	Lunch	Yes	K-8 (age 5-13)	<a href="#">Setup</a>

## Menu Plans - Calendar Menus and Cycle Menus

Perform the following procedure to add a Reimbursable Meal Group to a Menu.

1. From the left-hand navigation bar, click **Menus**.
2. Click **Maintenance**, when adding a Calendar Menus, click **Cycle Menus**, when adding a Cycle Menu.
3. Enter a menu name to find a specific menu or leave the Menu Name field blank for all menus.
4. Click **Search**.
5. Click the **Menu#** hyperlink, or double-click the menu you want to open.
6. Select the month and year
7. Double-click a menu day that you would like to add meals.

Today < > December, 2014						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
30	01 Lunch x	02 Lunch x	03 Lunch x	04 Lunch x	05 Lunch x	06
07	08	09	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	01	02	03
04	05	06	07	08	09	10



## 8. The Recipe tab displays. Click Reim Meal Groups.

Home > Menus > Menu Search > Edit : 3 - HHFKA Lunch K-5

General Recipes Production Quantities Reports

Menu Date: 12/5/2014 View Type: Portion Size

<sup>1</sup> -denotes required nutrient values.  
<sup>2</sup> -Trans Fat value is provided for informational purposes only, not for monitoring purposes.  
 \* denotes combined nutrient totals with either missing or incomplete nutrient data.  
 \*N/A\* denotes a nutrient that is missing or incomplete for an individual ingredient.

Recipe #	Description	Portion	Reim- burse	A la Carte	Calories <sup>1</sup> (kcal)	Saturated Fat <sup>1</sup> (g)	Saturated Fat CALC %	Sodium <sup>1</sup> (mg)	Sugars (g)	Sugar: CALC %
1	1119 PEPPERONI PIZZA	SLICE	<input type="checkbox"/> 1	<input type="checkbox"/> 0	270	4.0	13.3%	810	*N/A*	*N/A*
2	1122 CHEESE PIZZA	SLICE	<input type="checkbox"/> 1	<input type="checkbox"/> 0	260	4.0	13.8%	720	*N/A*	*N/A*
3	1092 CHICKEN FILLET SANDWICH	SANDWICH	<input type="checkbox"/> 1	<input type="checkbox"/> 0	231	0.8	3.2%	528	4.8*	8.3%
4	1091 DAILY SALAD	SERVING	<input type="checkbox"/> 1	<input type="checkbox"/> 0	20	0.0	1.6%	7	2.2	43.6
5	1093 MAYONNAISE; LOW CALORIE	2 TSP	<input type="checkbox"/> 1	<input type="checkbox"/> 0	25	0.3	10.1%	81	0.4	6.6
6	1094 CHERRY TOMATOES	1/2 CUP	<input type="checkbox"/> 1	<input type="checkbox"/> 0	13	0.0	1.5%	4	2.0	58.4
7	1103 MIXED NUTS: WITHOUT PEANUTS	1/4 CUP	<input type="checkbox"/> 1	<input type="checkbox"/> 0	172	2.0	10.6%	41	1.5	3.4
8	1107 RANCH DRESSING	TBSP	<input type="checkbox"/> 1	<input type="checkbox"/> 0	18	0.3	13.3%	90	*N/A*	*N/A*
9	1120 PINEAPPLE SLICES	1/2 CUP	<input type="checkbox"/> 1	<input type="checkbox"/> 0	75	0.0	0.1%	1	18.0	96.3
10	1121 PEAR, BARTLETT	EACH	<input type="checkbox"/> 1	<input type="checkbox"/> 0	96	0.0	0.0%	2	14.7	61.5
11	1123 APPLE: MEDIUM	EACH	<input type="checkbox"/> 1	<input type="checkbox"/> 0	95	0.1	0.5%	2	*N/A*	*N/A*
12	1124 SPLIT PEA SOUP	CUP	<input type="checkbox"/> 1	<input type="checkbox"/> 0	361	1.0	2.5%	1700	8.0	8.9
13	1125 HONEYDEW MELON BALLS	1/2 CUP	<input type="checkbox"/> 1	<input type="checkbox"/> 0	32	0.0	0.8%	16	7.2	90.2
14	500095 CREAMY DIP FOR FRESH VEGETABLE	2 TBSP	<input type="checkbox"/> 1	<input type="checkbox"/> 0	52	0.6	10.5%	269	*N/A*	*N/A*
15	230 MILK, 1% Lowfat	HALF PINT	<input type="checkbox"/> 1	<input type="checkbox"/> 0	102	1.5	13.5%	107	12.7	49.5*
					1905.3	14.8	7.0%	4480.1	83.9*	17.6%

Add Production Quantities Reim. Meal Groups Delete Meal Totals: 1 Cancel Save

## 9. Click Add New Reim Meal.





10. Type the reimbursable meal group name. Use a name that is descriptive of what the meal contains.

11. Select the recipes for that menu date that you want to include in the meal.

12. Select the **Include In Meal** check box to add recipes to the reimbursable meal group.

The Requirement Check will show if the daily minimum requirements have been met with a  or not met with a .

Reim Meal Group Name:  Menu Date: Monday, December 08, 2014

Daily Meal Pattern Requirements				Requirement Check			
#	Recipe Name	Portion	Include In Meal	Component	Subgroup	Required Minimum	Daily Check
1	ALMOND BROCCOLI SALAD W/TURKEY	1/2 CUP	<input type="checkbox"/>	Meat/Meat Alt	M/MA oz eq	0.000 oz eq	0.000 
2	ALMOND CHERRY BREAD PUDDING	1 SQUARE	<input type="checkbox"/>	Grain	Grain oz eq	1.000 oz eq	0.000 
3	ALMOND CHICKEN FAJITAS	EACH	<input checked="" type="checkbox"/>		M/MA as Grains oz eq		0.000
4	ALMOND CHICKEN PILAF	CUP	<input type="checkbox"/>		Whole Grain Rich oz eq		0.000
					Grain Based Dessert oz eq		0.000
				Fruit*	Fruit cups	1.000 cup	17.750 
				Milk	Milk cups	1.000 cup	0.000 

\* May include Vegetable contributions

# APPENDIX

13. When finished, click **Save**. The following screen displays with the indicators that identify if you have met the Daily Meal Pattern Requirements and Milk Offered Requirements.

Menu Name: Elementary Lunch-Traditional      Monday, September 3, 2018      Prev Day Next Day

**Defined Reimbursable Meals**

Meal Name	
<a href="#">Hamburger and Side Salad</a>	✔
<a href="#">Lasagna and Green Beans</a>	!

**Daily Meal Pattern Requirements**

Component	Required Min	Actual Min	
Meat/Meat Alt	1.000 oz eq	2.000	✔
Grain	1.000 oz eq	0.750	!
Fruit	0.500 cup	0.500	✔
Vegetable	0.750 cup	1.000	✔
Milk	1.000 cup	1.000	✔

**Milk Offered Requirements**

Component		
Skim/Fat Free/Unflavored	<input checked="" type="checkbox"/>	✔
Skim/Fat Free/Flavored	<input checked="" type="checkbox"/>	✔
Low-Fat(1% or less)/Unflavored	<input type="checkbox"/>	✔
Low-Fat(1% or less)/Flavored	<input type="checkbox"/>	✔
Reduced-Fat(2% or whole)	<input type="checkbox"/>	✔

**Note:** If you hover your mouse over the individual Reimbursable Meal name (under Defined Reimbursable Meals), a pop up appears informing you whether or not requirements have been met for that individual meal. If requirements are being met, the font will be green. If they're not being met, the font will have a red background.

Menu Name: HHFKA Lunch K-5

**Defined Reimbursable Meals**

Meal Name	
<a href="#">Monday Meal 1</a>	✔
<a href="#">Monday Meal 2</a>	✔
<a href="#">Monday Meal 3</a>	✔

M/MA: 2.000  
 Grain: 2.000  
 Fruit: 1.000  
 Veg: 1.500  
 Milk: 2.000

A meal can be deleted or edited by clicking on the meal name (hyperlink) under Defined Reimbursable Meals.

Reim Meal Group Name: Monday Meal 3      Menu Date: Monday, December 1, 2014

**Daily Meal Pattern Requirements**

#	Recipe Name	Portion	Include In Meal
1	GROUND BEEF & MACARONI	CUP	<input type="checkbox"/>
2	BAKED CAJUN FISH	1 PIECE	<input type="checkbox"/>
3	CHICKEN FILLET SANDWICH	SANDWICH	<input checked="" type="checkbox"/>
4	BANANAS	EACH	<input type="checkbox"/>
5	STRAWBERRIES,FRESH	CUP	<input checked="" type="checkbox"/>
6	MILK,1% Lowfat	HALF PINT	<input checked="" type="checkbox"/>
7	MILK,Skim	HALF PINT	<input checked="" type="checkbox"/>
8	PEACHES: canned,light syrup	CUP	<input type="checkbox"/>
9	ORANGE GLAZED SWEET POTATOES	1/2 CUP	<input type="checkbox"/>
10	MARGARINE	TSP	<input type="checkbox"/>

**Requirement Check**

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

Delete Cancel Save

# APPENDIX

## Weekly Requirements Report

The Weekly Requirements Report analyzes meal component contributions offered in your menu cycle and compares them with the Healthy Hunger Free Kids Act (HHFKA) Five day weekly meal pattern requirements.

Refer to the **Reports** section for the Weekly Requirements (Five Day or Special Week) Report details.

Heartland School Solutions															
Weekly Certification Worksheet															
2. Elementary Lunch-Traditional						Lunch K-5 (age 5-10)				Week of 1/6/2020					
5 Day Week	Mon 01/06/20	Tue 01/07/20	Wed 01/08/20	Thu 01/09/20	Fri 01/10/20			Weekly Total	Weekly Rqmt.	Weekly Rqmt. Check	Weekly Fruit Juice Limit Check (no more than half of Total Fruit)	Total Weekly Fruit	Total Weekly Fruit Juice	% of Total Weekly Fruit that is Juice	Weekly Rqmt. Check
Fruit: Minimum (cups)	0.5	0.5	0.5	0.5	0.5			2.5	2.5	Yes		3	0.25	8.33%	Yes
Vegetables: Minimum (cups)	1.25	1.25	1.5	2.125	2			8.125	3.75	Yes	Weekly Veg. Juice Limit Check (no more than half of Total Veg.)	Total Weekly Veg.	Total Weekly Veg. Juice	% of Total Weekly Veg. that is Juice	Weekly Rqmt. Check
-Dark Green	1	1	0	1	1.5			4.5	0.5	Yes					
-Red/Orange	0.375	0.25	0.75	0.375	0.625			2.375	0.75	Yes					
-Beans & Peas (Legumes)	0	0	0	0	0.125			0.125	0.5	NO					
-Starchy	0	0	1.5	0	0			1.5	0.5	Yes					
-Other	1	1	0.125	1	0.125			3.25	0.5	Yes					
Meat/Meat Alt: Minimum (oz eq)	2	2	2	2	2			10	8	Yes					
Meat/Meat Alt: Maximum (oz eq)	2	2	2	2	2			10	10	Yes					
Grain: Minimum (oz eq)	1.25	2	0	1.25	1			5.5	8	NO					
Grain: Maximum (oz eq)	1.75	3	2	2	1.5			10.25	9	OVER					
Grain Based Dessert Total for all weekly meals								0	No more than 2 oz	Yes					
Whole Grain Rich Weekly Amount	Weekly Grains Total	17.75	Weekly Whole Grain Rich Total	16.75	% of Whole Grain Rich	94.37%			50% Whole Grain Rich	Yes					
	Mon 01/06/20	Tue 01/07/20	Wed 01/08/20	Thu 01/09/20	Fri 01/10/20			Weekly Total	Weekly Rqmt.	Weekly Rqmt. Check					
Milk: Minimum (cups)	1	1	1	1	1			5	5	Yes					
Variety: Skim/Fat-free unflavored, Skim/fat-free flavored, Low-fat(1% or less) unflavored, Low-fat(1% or less), flavored	Yes	Yes	Yes	Yes	Yes										
Reduced fat(2%) or whole, unflavored and flavored															

\*\* Cells with this background color signify Requirements not being met!

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