



OneSource/Kidserve
Release Notes
November 2020

Section 1: Introduction

The November release notes outline:

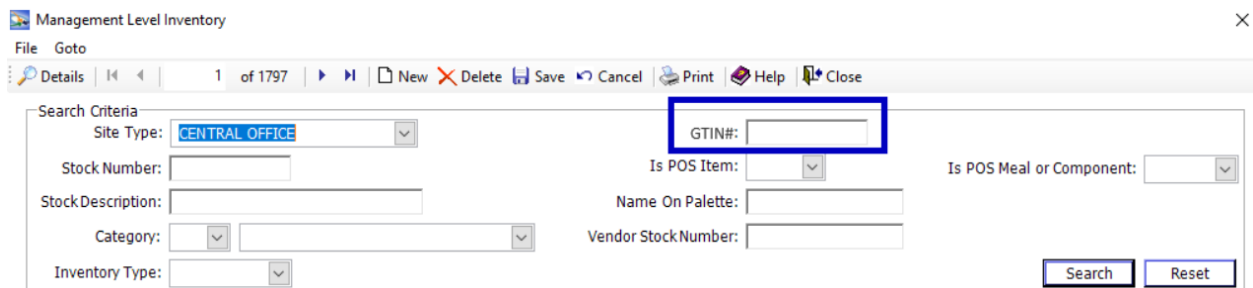
- New Features
 - GTIN #
 - Meals To-Go
- Feature Enhancements
- Bug Fixes

Section 2: New Features

This section describes the enhancements and other changes since the 2020-2021 School Start Up release version 2020.04.10.

GTIN#

Manufacturer GTIN# is available on the stock item tab.



Management Level Inventory

File Goto

Details 1 of 1797 New Delete Save Cancel Print Help Close

Search Criteria

Site Type: CENTRAL OFFICE

Stock Number:

Stock Description:

Category:

Inventory Type:

GTIN#:

Is POS Item:

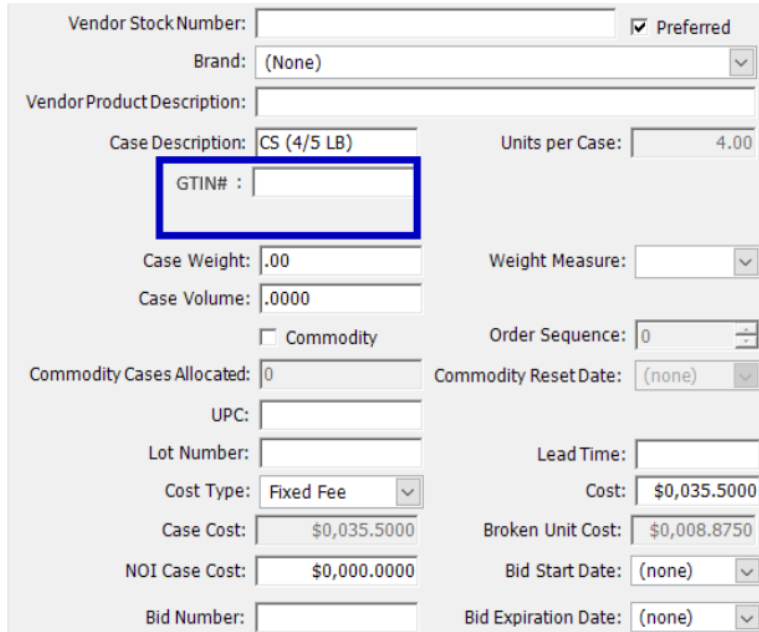
Is POS Meal or Component:

Name On Palette:

Vendor Stock Number:

Search Reset

Vendor Name	Vendor Stock #	GTIN#	Product Description
DORI FOODS			



Vendor Stock Number: Preferred
Brand: (None)
Vendor Product Description:
Case Description: CS (4/5 LB) Units per Case: 4.00
GTIN# :
Case Weight: .00 Weight Measure:
Case Volume: .0000
 Commodity Order Sequence: 0
Commodity Cases Allocated: 0 Commodity Reset Date: (none)
UPC:
Lot Number: Lead Time:
Cost Type: Fixed Fee Cost: \$0,035.5000
Case Cost: \$0,035.5000 Broken Unit Cost: \$0,008.8750
NOI Case Cost: \$0,000.0000 Bid Start Date: (none)
Bid Number: Bid Expiration Date: (none)

Inventory Management: GTIN#

The GTIN# can only be edited when logged in at the Central Office.

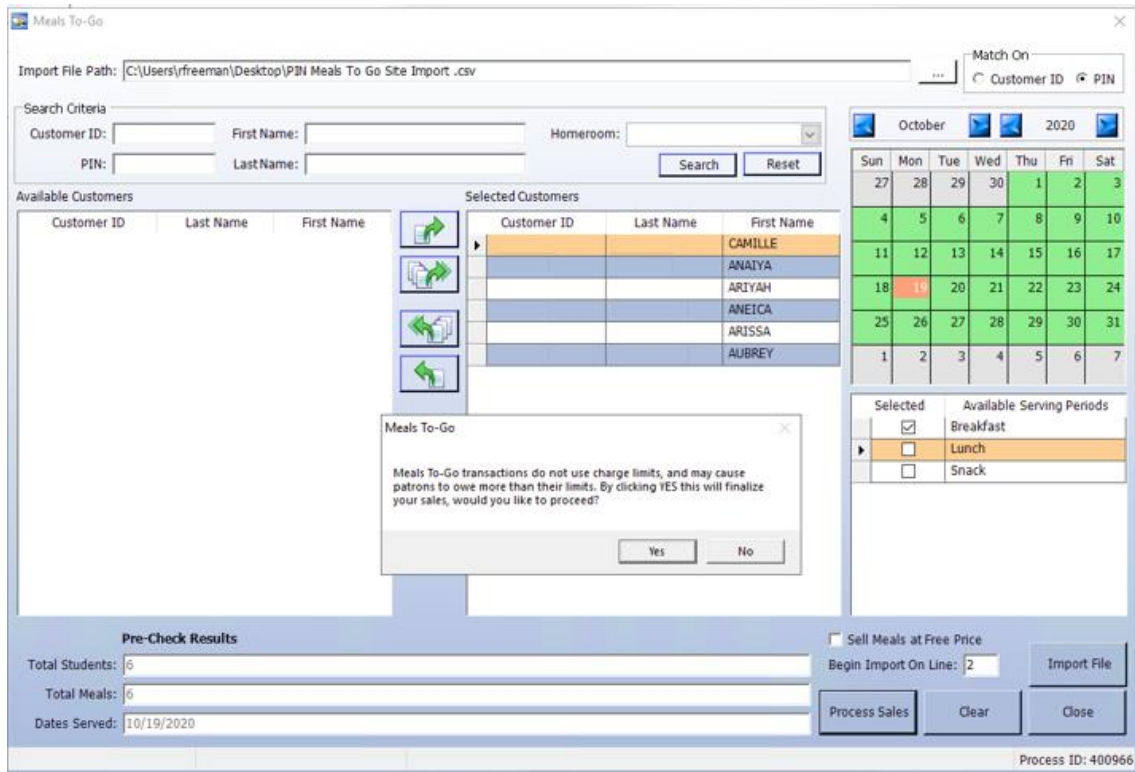
Meals To-Go

This feature provides cashiers with the ability to process multiple transactions across multiple days and serving periods on any machine for meal pick-ups.

The new module can be found under Front of House > Meals To-Go.

Multiple meals sales can be imported, or the criteria can be selected to sell meals by:

- Customer/Patron
- Days
- Serving Period
- Option to sell meals for free



The sales bypass charge limits and are recorded as transactions that are included in the standard reports. Meals can be sold within a 30-day date range (before and after) the current date. Transactions can also be voided from terminals as part of the current functionality.

A pre-check process will run to exclude second meals and inactive students.

5-Day Query for Summarize Meal Counts by Eligibility

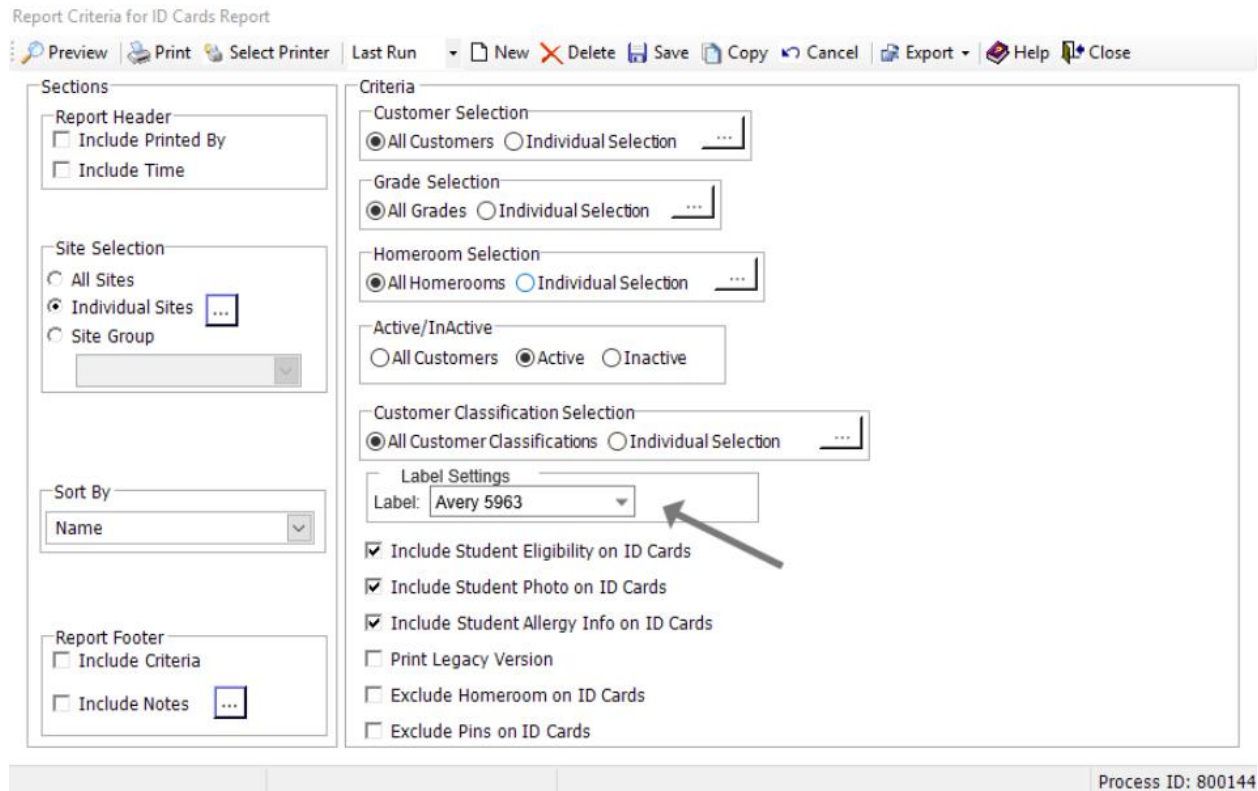
Horizon created a query to split out meal counts by eligibility. This is a breakout like the Basic Claims report.

The one meal sale would calculate for the full week through SQL. Once it has been calculated by either a SQL Server Agent Task or an OSCScheduled task we can store the data to a temporary table.

Horizon can also generate this out as a student list and or make the data look like or default Basic Claims Report through a custom report.

Avery 5963 Label

There are two Avery label options for ID card printing – Avery 5963 and 5390. The Avery 5963 provides the option to adhered sticker labels to luggage tags.



Report Criteria for ID Cards Report

Preview | Print | Select Printer | Last Run | New | Delete | Save | Copy | Cancel | Export | Help | Close

Sections

- Report Header
 - Include Printed By
 - Include Time
- Site Selection
 - All Sites
 - Individual Sites ...
 - Site Group
- Sort By
 - Name
- Report Footer
 - Include Criteria
 - Include Notes ...

Criteria

- Customer Selection
 - All Customers
 - Individual Selection ...
- Grade Selection
 - All Grades
 - Individual Selection ...
- Homeroom Selection
 - All Homerooms
 - Individual Selection ...
- Active/Inactive
 - All Customers
 - Active
 - Inactive
- Customer Classification Selection
 - All Customer Classifications
 - Individual Selection ...
- Label Settings
 - Label: Avery 5963
- Include Student Eligibility on ID Cards
- Include Student Photo on ID Cards
- Include Student Allergy Info on ID Cards
- Print Legacy Version
- Exclude Homeroom on ID Cards
- Exclude Pins on ID Cards

Process ID: 800144

Adjustment Comments

Users can add adjustment comments while adjusting student accounts.

Application Audit Report

Date Processed has replaced the Date Created on the Application Audit report.

Breakfast Audit Report

The Breakfast Audit report includes total cost of amount used which matches the Production Record report.

Double Meals Report

The Double Meals report is sorted by serve date and serve time.

Central Office

Double Meal Report

Serve Time	Terminal	Order	Serving Period	Name
01/31/2020				
1/31/2020 12:08:25PM	3	251	Lunch	
1/31/2020 12:10:22PM	8	338	Lunch	
1/31/2020 12:09:34PM	8	328	Lunch	
1/31/2020 12:11:14PM	5	199	Lunch	
1/31/2020 10:38:06AM	8	86	Lunch	
1/31/2020 10:47:35AM	3	60	Lunch	
01/14/2020				
1/14/2020 12:40:12PM	5	480	Lunch	
1/14/2020 12:40:15PM	5	481	Lunch	

REPORT CRITERIA:
Sections Filter(s): All Sites



Free and Reduced Application

The printed Free and Reduced Applications now include the Date Submitted above Date Created.

Central Office	
Free and Reduced Application	
Printed: 05/18/2020 3:47 PM Printed By: Horizon Administrator	
<hr/>	
Household Size:	Date Submitted: 08/03/2019
Household Income:	Date Created: 08/03/2019
Income Frequency:	Date Verified:
Student Income:	
Student Frequency:	

Production Items Served Report

The Production Items Served (legacy version) report includes a new option to “Display By Site”.

Profit and Lost Report

The Profit and Lost report includes the total amount of food used which matches the Production Profit and Loss report.

Reason for Adjustment


A new “Food Donation” reason for adjustment is available on the inventory adjustment screen.

Related Application Report

We have added an option to only show students who match on a given criteria and have a different eligibility.

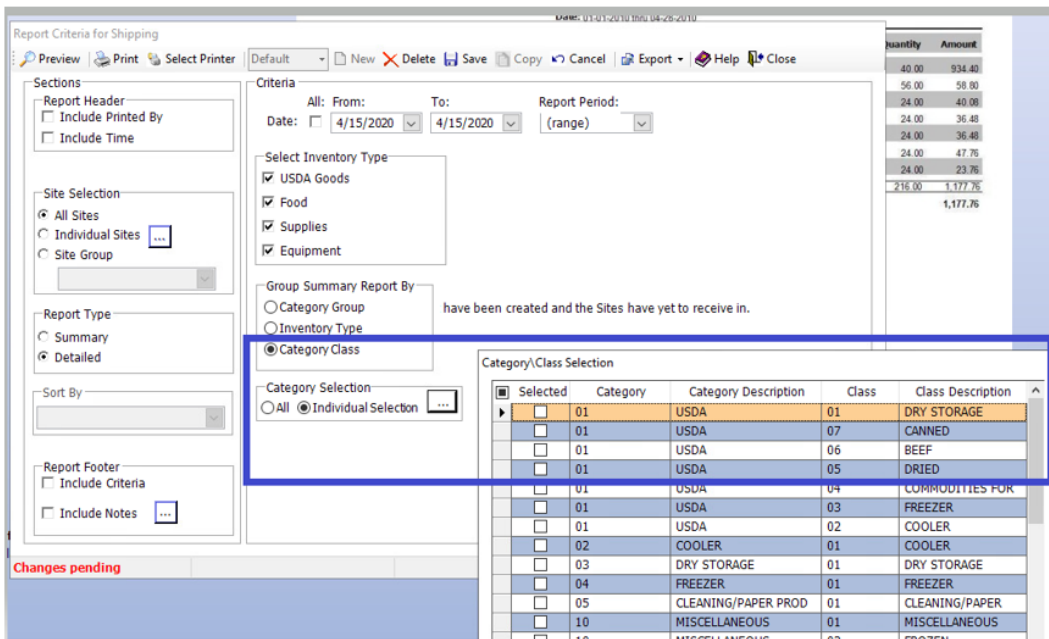
School Year (CACFP) Report

Wisconsin school districts have access to a new School Year CACFP report for auditing meals served during the school year as opposed to summer serving.

 HS School School Year CACFP Report																				
Name of School: Reagan HS School				Month and Year:																
Date	CACFP Breakfasts Served	CACFP Lunches Served	CACFP Snacks Served	Total Dinner Served	Comments															
04/30/2020	0	0	2	0	Test Comment															
Totals:	0	0	2	0																
Highest Dinner Count: 0		Average Daily Participation (ADP): 2.00		Number of Serving Days: 1																
<table border="1"> <thead> <tr> <th></th> <th>Total CACFP Breakfasts</th> <th>Total CACFP Lunches</th> <th>Total CACFP Snacks</th> <th>Total Dinner</th> </tr> </thead> <tbody> <tr> <td>Reagan HS School</td> <td>0</td> <td>0</td> <td>2</td> <td>0</td> </tr> <tr> <td>Grand Totals</td> <td>0</td> <td>0</td> <td>2</td> <td>0</td> </tr> </tbody> </table>							Total CACFP Breakfasts	Total CACFP Lunches	Total CACFP Snacks	Total Dinner	Reagan HS School	0	0	2	0	Grand Totals	0	0	2	0
	Total CACFP Breakfasts	Total CACFP Lunches	Total CACFP Snacks	Total Dinner																
Reagan HS School	0	0	2	0																
Grand Totals	0	0	2	0																

Shipping Report

Group Summary Report By (Category Group, Inventory Type and Category Class) is added report criteria.



Report Criteria for Shipping

Sections:

- Report Header:
 - Include Printed By
 - Include Time
- Site Selection:
 - All Sites
 - Individual Sites
 - Site Group
- Report Type:
 - Summary
 - Detailed
- Sort By: [Dropdown]
- Report Footer:
 - Include Criteria
 - Include Notes

Criteria:

All: From: 4/15/2020 To: 4/15/2020 Report Period: (range)

Select Inventory Type:

- USDA Goods
- Food
- Supplies
- Equipment

Group Summary Report By:

- Category Group
- Inventory Type
- Category Class

Category Selection:

- All
- Individual Selection

Category/Class Selection:

Selected	Category	Category Description	Class	Class Description
<input type="checkbox"/>	01	USDA	01	DRY STORAGE
<input type="checkbox"/>	01	USDA	07	CANNED
<input type="checkbox"/>	01	USDA	06	BEEF
<input type="checkbox"/>	01	USDA	05	DRIED
<input type="checkbox"/>	01	USDA	04	COMMUNITIES FOR
<input type="checkbox"/>	01	USDA	03	FREEZER
<input type="checkbox"/>	01	USDA	02	COOLER
<input type="checkbox"/>	02	COOLER	01	COOLER
<input type="checkbox"/>	03	DRY STORAGE	01	DRY STORAGE
<input type="checkbox"/>	04	FREEZER	01	FREEZER
<input type="checkbox"/>	05	CLEANING/PAPER PROD	01	CLEANING/PAPER
<input type="checkbox"/>	10	MISCELLANEOUS	01	MISCELLANEOUS
<input type="checkbox"/>	10	MISCELLANEOUS	02	FROZEN

Changes pending

Management Level Inventory

File Goto

Search List 2 of 1293 New Delete Save Cancel Print Help Close

Stock Number: 1000 Stock Description: APPLE FRESH RED 138CT Date Added: 11/11/2013 9:14 AM

Stock Item Vendor Menu Planner Procurement Cost and Case Size Changes Inventory Modes POS Bid Specifications Allergens

Global Item USDA Item Is Recipe Catch Weight Item TempAlert Item

Category/Class: 11 DRY 01 FOOD Copy Stock Item

Inventory Type:	Category	Category Description	Class	Class Description	Checked
Food	05	CLEANING/PAPER PRODUCTS	01	CLEANING/PAPER	<input type="checkbox"/>
Shelf Life: 0	02	COOLER	01	COOLER	<input type="checkbox"/>
COA Code: <None>	11	DRY	01	FOOD	<input type="checkbox"/>
Case Description: CS (138 C	11	DRY	02	DISP SUPPLY	<input type="checkbox"/>
Cost Type: Fixed Fee	11	DRY	03	CHEMICAL	<input type="checkbox"/>
Retail Case Cost: \$0,00	11	DRY	04	NONDISP SUPPLY	<input type="checkbox"/>
	03	DRY STORAGE	01	DRY STORAGE	<input type="checkbox"/>
	99	Finished Goods	11	Vegetables and Vegetable Produ	<input type="checkbox"/>

VA Production Record

Special Events and Promos can now be entered on the Daily Production module.

Date of Service 5/14/2020

Menu	Cycle 1 2 3 4	Special Events and Promos
	Week 1 2 3 4	Lee's Special Event
PIZZA CHEESE 4X6 96/ FISH FILLET ON BUN POTATO		2020.2.133
WEDGES WRHSAPPLESAUCE CANSWH6/ MILK 1%		
WHITE 50/ MILK CHOC SKIM 50 MILK SKIM 50/		

Section 3: Bug Fixes

This section describes the bug fixes since the 2020-2021 School Start Up release version 2020.04.10.

Jira #	Description	Details
OS-1013	Returns should be done at value and location received not FIFO value and location	Updated logic to look for matching location areas and not matching location area, Units per Pack, Broken Cost and received date when returning on a purchased good order.
OS-1992	Shipping Exception Report Showing No Exceptions When Replenishment Goods Arrive AFTER Goods are Shipped	The Broken On Order value was not bound to date range. The update will bind the value up to the end of the date range entered.
OS-3893	The Stock Transfer Send function from the OneSource calendar will not allow a new transfer to be saved	Save was coded to not enable when implementing the changes for OSC. If users can access the Transfers, they should be able to create and save.
OS-3947	Default Production record - Total Cost of Amount Used is not rounding correctly	Logic has been updated to prevent double counts when items exist in more than one meal pattern.
OS-3992	CEP Meal Count report doubling meals for a specific site	Updated the rate count to be based on the count of rates in the database.
OS-4321	New Base Menu Cycle overwrites existing cycle when created	The process is not creating a new record to edit and is instead having the user edit the details of the record that is selected in the query form. As a work around for the meantime they can click New and then click New once more in the data form to create a new Cycle.
OS-4237	Unable to send file when Exporting Orders via SFTP	Resolved issue with exporting to a specific directory on an SFTP Server outside of the root.
OS-4392	Alert Details Report requires Homeroom now when it should not	The Alerts are reliant on a homeroom being set for each patron. Once the Homerooms are imported in for the students, they will start appearing in the Alert Detail Report. If you create a Homeroom and assign it to one of the examples they will appear in the report.
OS-4463	Scheduled Menu Plans report is not generating the data	When users copy menus from one age group to another the report will now generate.
OS-4445	Incorrect Site shows on ID Card Report for Students	The ID Card Report version has been updated.
OS-4466	Completed Production not clearing from Daily Production grid	Logic has been added to refresh the Completed Production grid once the data from is closed.