User Group Forums 2013

Management Reporter for Microsoft Dynamics® ERP

Intermediate Training Session I
Using the Migration Wizard

Session starts at 2:00pm EDT/11:00am PDT

Hosted by: MSXGROUP

With special presentations by the Microsoft CPM team

Moderated by Noah Moseley

Management Reporter Intermediate Training Session - AGENDA

2:00pm-3:15pm EDT (11:00am-12:15pm PDT)

During this session, we will cover upgrade recommendations for moving from FRx to Management Reporter, focusing on the Migration Wizard.

Attendees will be muted but may ask questions via text using the GoToWebinar Chat or Question option. To ask questions verbally, please raise your hand by clicking the hand icon on the GoToWebinar control panel.

User Group Forums 2013
Hosted by the MSX Group

Management Reporter for Microsoft Dynamics ERP

Management Reporter

WHEN to migrate?

WHAT to migrate?

Attendees will be muted but may ask questions via text using the GoToWebinar Chat or Question option. To ask questions verbally, please raise your hand by clicking the hand icon on the GoToWebinar control panel.

FRx

Migration Wizard

Management Reporter

Attendees will be muted but may ask questions via text using the GoToWebinar Chat or Question option. To ask questions verbally, please raise your hand by clicking the hand icon on the GoToWebinar control panel.

Management Reporter

FRx Maintenance Before Migration

- Backup SysData folder.
- Delete Old/Demo Companies, Spec Sets, Rows, Columns, Trees and Catalog ID's.
- Delete unreferenced .F32 files in the SysData folder.
- Address Row Linking, Account Sets, Unassociated Rows/Columns/Trees, Chained Reports.
- Delete all .G32 files in the SysData shared folder.
- Set Each Company as Default.
- Compact all Spec Set databases and System database.
- Export any existing MR reports
- Backup SysData folder again as a migration copy

Attendees will be muted but may ask questions via text using the GoToWebinar Chat or Question option. To ask questions verbally, please raise your hand by clicking the hand icon on the GoToWebinar control panel.

Management Reporter

Remember to check these items in a migration:
- Account Sets
- Chained Reports
- Row Linking
- Effective Dates
- Blank Row Codes
- Missing Segment References
- Spaces in Column BASE calculations
- Forecaster References
- Currency Conversions

Attendees will be muted but may ask questions via text using the GoToWebinar Chat or Question option. To ask questions verbally, please raise your hand by clicking the hand icon on the GoToWebinar control panel.

User Resources

•Microsoft.com
  •PartnerSource
  •CustomerSource
•https://connect.microsoft.com
•http://blogs.msdn.com/b/dynamicscpm/

http://www.msxgroup.com
http://boards.msxgroup.com

Session slides will be made available to attendees later this week via email.

User Group Forums 2013
Hosted by the MSX Group

www.MSXGroup.com

Thank you!

User Group Forums 2013

Management Reporter for Microsoft Dynamics® ERP
Intermediate Training Session I

Up next: **Management Reporter Session 5 – Intermediate Session II**

Session starts at 3:30pm EDT/12:30pm PDT

Email us at:
Derek.Krebs@MSXGroup.com
Nick.Sercer@MSXGroup.com
Noah.Moseley@MSXGroup.com

Locate us also at:
(866) 456-7632
www.MSXGroup.com
Facebook.com
Twitter.com