User Group Forums 2016

Session starts at 1:30pm EDT/10:30am PDT

Hosted by: **MSXGROUP**

User Group Forums 2016

- Management Reporter User Group Forum (Monday 03/21/16)
- Forecaster User Group Forum (Tuesday 03/22/16)
- FRx/MSX Group Prospero User Group Forum (Weds 03/23/16)

User Group Forums 2016

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Management Reporter
User Group Forum 2016

Session 1: 11:00-12:00 Product Overview
Session 2: 12:15-1:15 Beginner Training Session
Session 3: 1:30-2:30 Intermediate Session 1
Session 4: 2:45-3:45 Intermediate Session 2
Session 5: 4:00-5:00 Closing Session with Q&A

*All times are Eastern.
*Log In and Log Out at anytime throughout the day.
*Attendees will be muted but may submit text questions.

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Management Reporter for Microsoft Dynamics ERP

Management Reporter Intermediate I
AGENDA

1:30pm-2:30pm EDT (10:30am-11:30am PDT)

During this session, we will cover a basic discussion of migrating reports from FRx as well as variations on the income statement to demonstrate design techniques you may leverage for your financial reporting and analysis needs.

Presented by Noah Moseley (noah.moseley@msxgroup.com)

Attendees will be muted but may ask questions via text using the GoToWebinar Chat or Question option.

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Management Reporter for Microsoft Dynamics ERP

Migrating from FRx

FRx

Migration Wizard

Management Reporter

Management Reporter for Microsoft Dynamics ERP

Migrating from FRx

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

Management Reporter for Microsoft Dynamics ERP

Migrating from FRx

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

Report Building Techniques

Next, let's look at the flexibility of report building in Management Reporter. Using an income statement report as an example, you can easily report on any dimension balances in the Row Definition, but also in the Column Definitions and in the Reporting Tree Definitions.

User Resources

Microsoft®

- Microsoft.com
  - PartnerSource
  - CustomerSource
- https://connect.microsoft.com
- http://blogs.msdn.com/b/dynamics_financial_reporting

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Management Reporter for Microsoft Dynamics ERP

Thank you!

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Management Reporter for Microsoft Dynamics® ERP

Up next: **Management Reporter Session 4 – Intermediate Session II**

Session starts at 2:45pm EDT/11:45am PDT (Nick Sercer)

<u>Locate us also at:</u>
(877) 456-7632
www.MSXGroup.com
Facebook.com
Twitter.com

<u>Email us at:</u>
Derek.Krebs@MSXGroup.com
Nick.Sercer@MSXGroup.com
Noah.Moseley@MSXGroup.com

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