

Session starts at 4:00pm Eastern (1:00pm Pacific)



Management Reporter
Forecaster
FRx
Prospero

User Group Spring Forums 2017

- Forecaster User Group Forum (Tuesday 3/14/17)
- Management Reporter User Group Forum (Wednesday 3/15/17)
- MSX Group Prospero User Group Forum (Thursday 3/16/17)

Register at www.msxgroup.com/2017-Spring-forums



User Group Forums 2017

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Management Reporter Users Forum

- Session 1: 11:00-12:00 Product Overview
- Session 2: 12:15-1:15 Beginner Training Session 1
- Session 3: 1:30-2:30 Intermediate Session 1
- Session 4: 2:45-3:45 Intermediate Session 2
- Session 5: 4:00-5:00 Additional Topics and Closing



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Management Reporter for Microsoft Dynamics ERP

Management Reporter Users Forum

- Log In and Log Out at anytime throughout the day.
- Attendees will be muted but may submit text questions using GoToWebinar Question section.



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Management Reporter for Microsoft Dynamics ERP

User Group Spring Forums 2017

Management Reporter

SESSION 5: Additional Topics, Recap, Q&A

Session starts at 4:00pm Eastern (1:00pm Pacific)



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This session presented by Nick Sercer

Additional Topics and Closing Agenda

4:00pm-5:00pm ET (1:00-2:00pm PT)

During this session, we will review security setup in Management Reporter for Users, Groups, Reporting Units and Library Folders. Report archiving and distribution will be discussed.

We will also look back on topics covered throughout today's sessions and close with any unanswered questions.



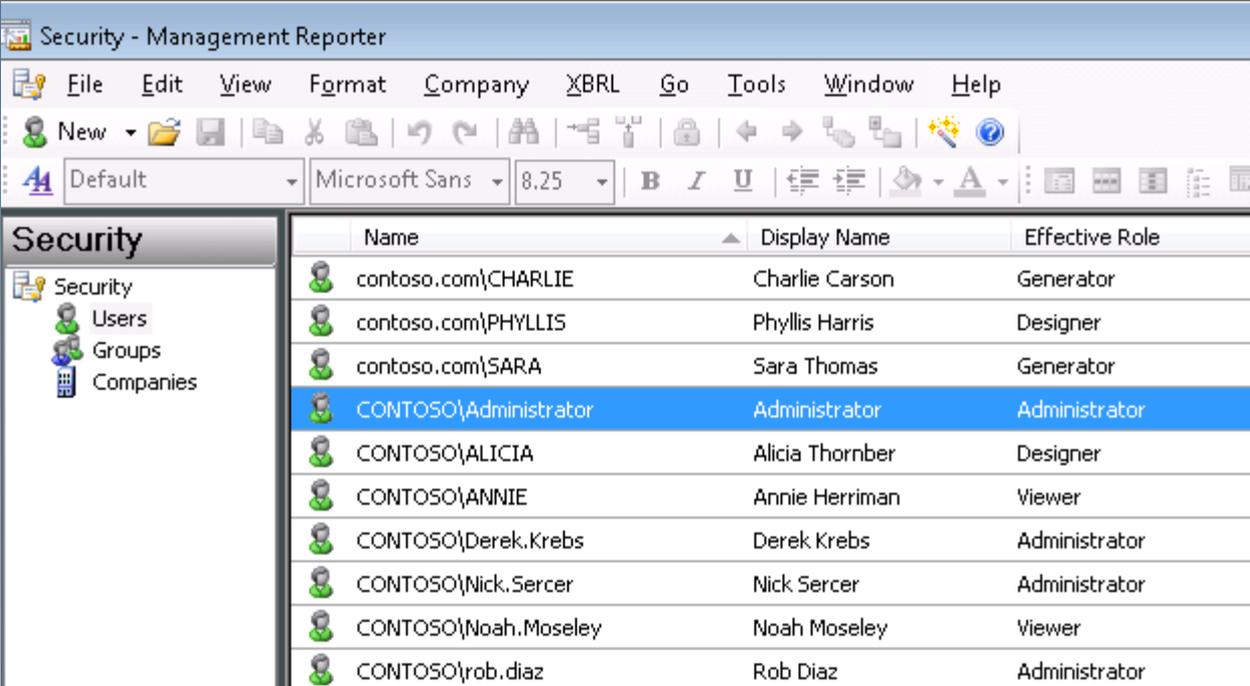
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Management Reporter for Microsoft Dynamics ERP

Security

- Users
- Groups
- Reporting Units
- Library Folders



The screenshot shows the 'Security - Management Reporter' application window. The interface includes a menu bar (File, Edit, View, Format, Company, XBRL, Go, Tools, Window, Help), a toolbar with various icons, and a ribbon with options like 'Default', 'Microsoft Sans', and '8.25'. On the left, a 'Security' sidebar lists 'Security', 'Users', 'Groups', and 'Companies'. The main area displays a table of users with columns for Name, Display Name, and Effective Role. The 'CONTOSO\Administrator' user is highlighted in blue.

Name	Display Name	Effective Role
contoso.com\CHARLIE	Charlie Carson	Generator
contoso.com\PHYLLIS	Phyllis Harris	Designer
contoso.com\SARA	Sara Thomas	Generator
CONTOSO\Administrator	Administrator	Administrator
CONTOSO\ALICIA	Alicia Thornber	Designer
CONTOSO\ANNIE	Annie Herriman	Viewer
CONTOSO\Derek.Krebs	Derek Krebs	Administrator
CONTOSO\Nick.Sercer	Nick Sercer	Administrator
CONTOSO\Noah.Moseley	Noah Moseley	Viewer
CONTOSO\rob.diaz	Rob Diaz	Administrator



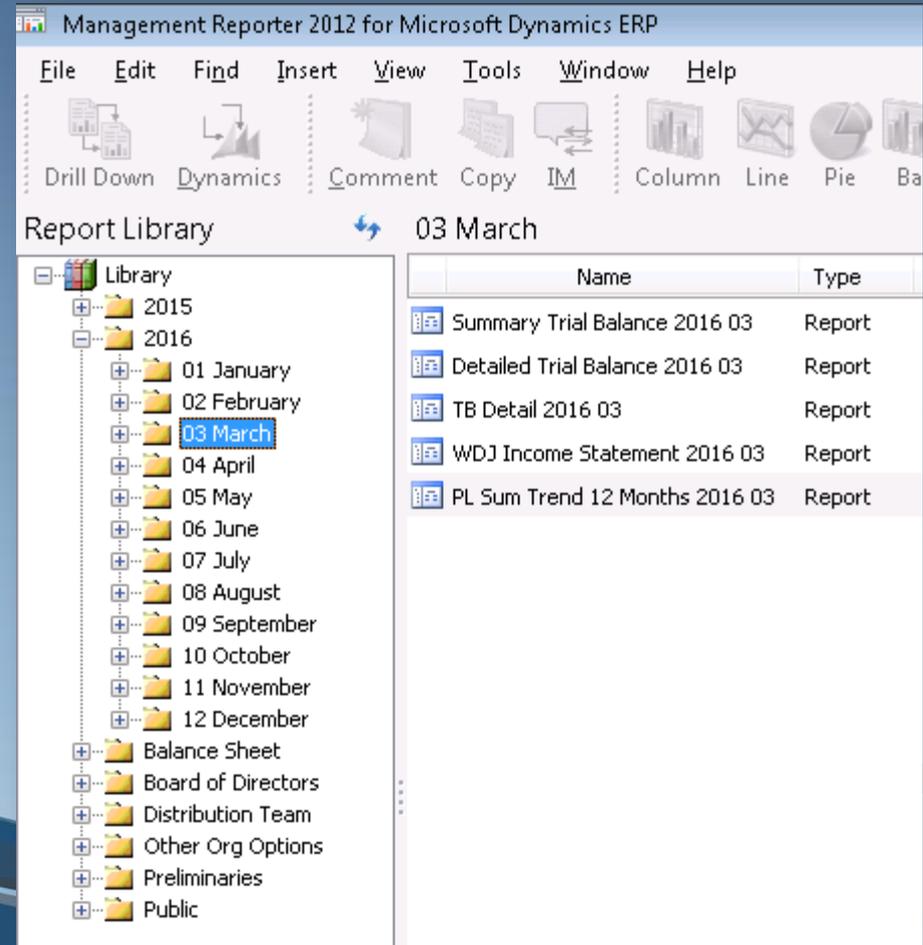
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Management Reporter for Microsoft Dynamics ERP

Report Archiving and Distribution

- Preliminaries Folder
- Monthly Folders
- Moving Last Version
- Deleting Old Versions
- Renaming Archived Reports (i.e. 2017 03)
- Other Distribution Options



The screenshot displays the Management Reporter 2012 for Microsoft Dynamics ERP interface. The window title is "Management Reporter 2012 for Microsoft Dynamics ERP". The menu bar includes File, Edit, Find, Insert, View, Tools, Window, and Help. The toolbar contains icons for Drill Down, Dynamics, Comment, Copy, IM, Column, Line, Pie, and Bar. The main area is divided into two panes. The left pane, titled "Report Library", shows a tree view of folders: 2015, 2016, 01 January, 02 February, 03 March (selected), 04 April, 05 May, 06 June, 07 July, 08 August, 09 September, 10 October, 11 November, 12 December, Balance Sheet, Board of Directors, Distribution Team, Other Org Options, Preliminaries, and Public. The right pane, titled "03 March", shows a table of reports.

Name	Type
Summary Trial Balance 2016 03	Report
Detailed Trial Balance 2016 03	Report
TB Detail 2016 03	Report
WDJ Income Statement 2016 03	Report
PL Sum Trend 12 Months 2016 03	Report



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Management Reporter for Microsoft Dynamics ERP

MR Users Forum Recap

- **General Overview**
- **Basic Report Writing Techniques**
- **Creative Income Statements**
- **Balance Sheet & Cash Flow Statements**
- **Security**
- **Report Archiving & Distribution**



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Management Reporter for Microsoft Dynamics ERP

Training Classes

- Introduction to Management Reporter - Friday, March 24, 2017 (11:00-5:00 ET)
- Advanced Management Reporter - Friday, April 13, 2017 (11:00-5:00 ET)
- Introduction to Management Reporter - Friday, May 12, 2017 (11:00-5:00 ET)
- Advanced Management Reporter - Friday, May 19, 2017 (11:00-5:00 ET)
- Introduction to Management Reporter - Friday, June 16, 2017 (11:00-5:00 ET)

WWW.MSXGROUP.COM/REGISTER



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2017 Events

Amplify

a collaboration between



March 19-21, 2017
Anaheim, CA

 **FOCUS** 17
AXUG CRMUG NAVUG PBIUG

May 7-12, 2017
St. Louis, MO

 **DSLUG** Fall
Conference
DYNAMICS SL USER GROUP

Sept 13-15, 2017
Tampa, FL



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October 10-13, 2017

Nashville 2017
Summit
AXUG | *bring it home.*

Nashville 2017
Summit
GPUG | *bring it home.*

Nashville 2017
Summit
NAVUG | *bring it home.*



Nashville, TN



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Fall User Forums

- **September 19, 2017** Forecaster Users Forum
- **September 20, 2017** Management Reporter Users Forum
- **September 21, 2017** Prospero Users Forum



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**Management Reporter,
Forecaster, FRx
and Prospero**

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Thank you!

User Group Forums 2017

Management Reporter Users Forum

Tomorrow: Prospero Users Forum *starts at 11:00am ET/8:00am PT*

<http://www.msxgroup.com/2017-Spring-forums>



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