

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



Management Reporter
Forecaster
FRx
Prospero

User Group Fall Forums 2016

- Forecaster User Group Forum (Monday 9/19/16)
- Management Reporter User Group Forum (Tuesday 9/20/16)
- MSX Group Prospero User Group Forum (Wednesday 9/21/16)

Register at www.msxgroup.com/2016-fall-forums



User Group Forums 2016

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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 Fall Forums 2016

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.



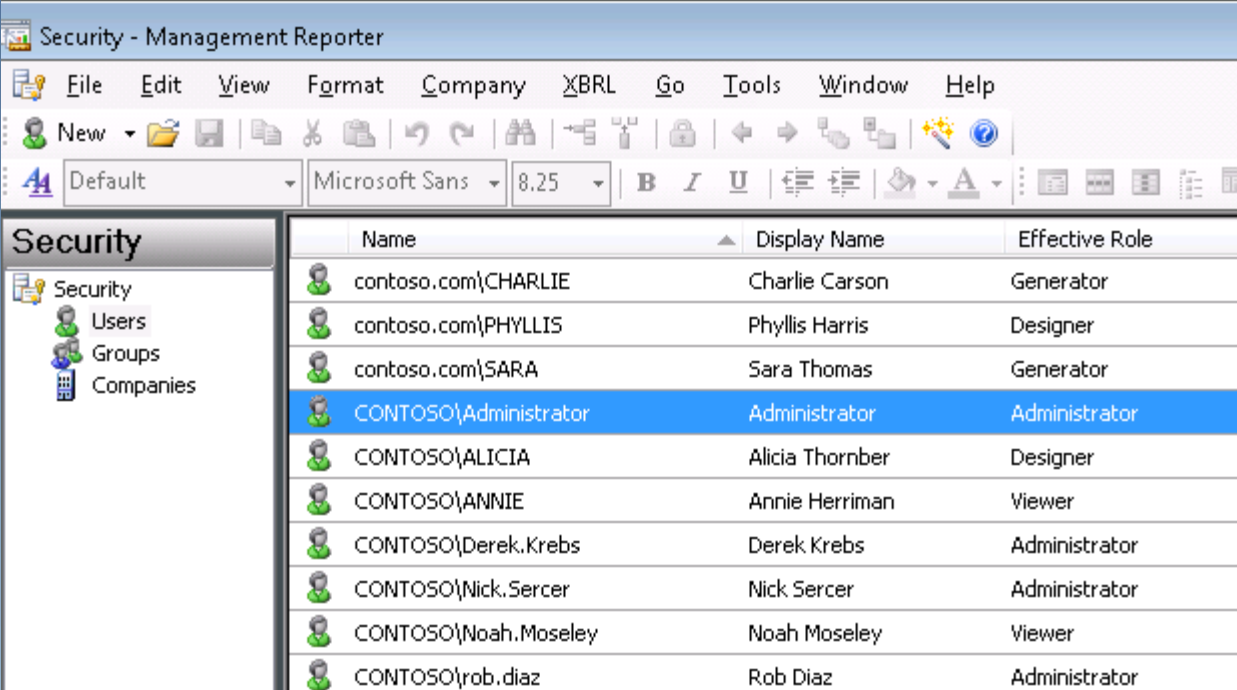
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Management Reporter for Microsoft Dynamics ERP

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) and a toolbar with various icons. On the left, there is a 'Security' sidebar with a tree view containing 'Security', 'Users', 'Groups', and 'Companies'. The main area displays a table of users with columns for Name, Display Name, and Effective Role. The user 'CONTOSO\Administrator' 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



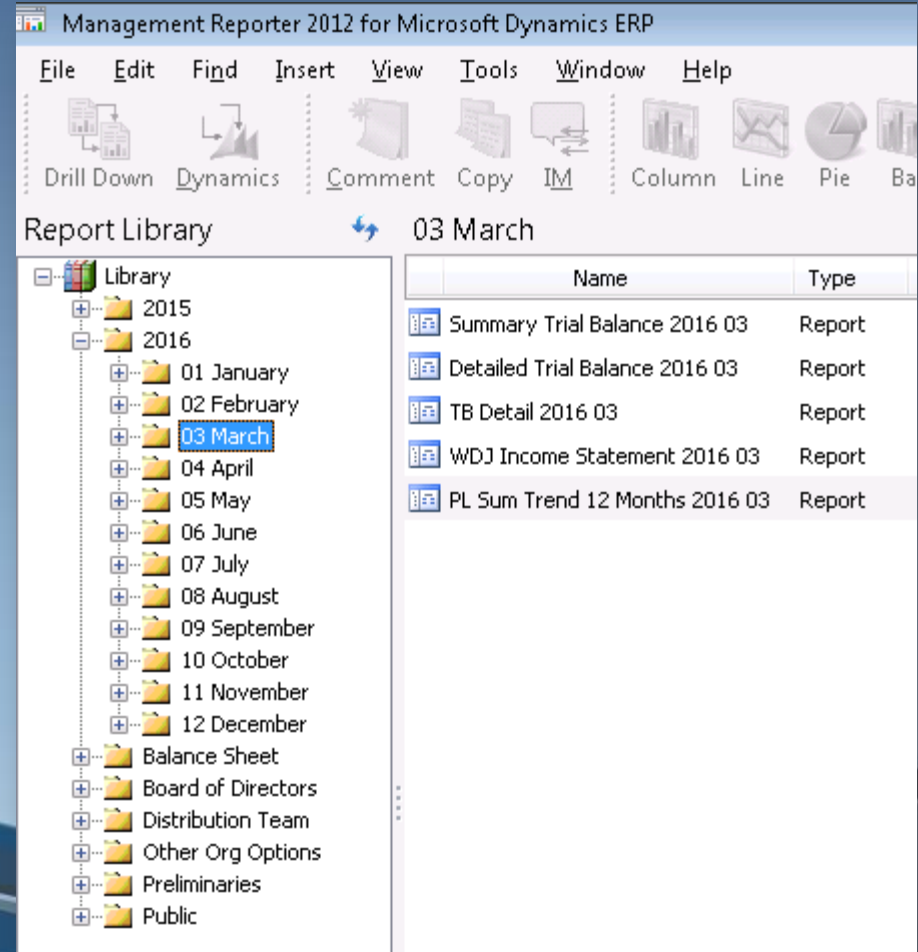
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Management Reporter for Microsoft Dynamics ERP

Report Archiving and Distribution

- Preliminaries Folder
- Monthly Folders
- Moving Last Version
- Deleting Old Versions
- Renaming Archived Reports (i.e. 2016 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 titled "Report Library" and shows a tree view on the left and a list of reports on the right. The tree view shows a hierarchy starting with "Library", followed by "2015" and "2016" folders. Under "2016", there are monthly folders from "01 January" to "12 December", with "03 March" selected. Below the monthly folders are other folders: "Balance Sheet", "Board of Directors", "Distribution Team", "Other Org Options", "Preliminaries", and "Public". The right pane shows a table of reports for "03 March".

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

Community Partners



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October 9-14, 2016

AXUG
summit
TAMPA 2016

<http://www.axug.com>

GPUG
summit
TAMPA 2016

<http://www.gpug.com>



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Sept 28-30, 2016



San Diego, California
<http://www.msdslug.com>



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TRAINING CLASSES

- Introduction to Management Reporter - Friday, October 28, 2016 (11:00-5:00 ET)
- Advanced Management Reporter - Friday, November 4, 2016 (11:00-5:00 ET)
- Introduction to Management Reporter - Friday, December 2, 2016 (11:00-5:00 ET)
- Advanced Management Reporter - Friday, December 9, 2016 (11:00-5:00 ET)

WWW.MSXGROUP.COM/REGISTER



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Thank you!

User Group Forums 2016

Management Reporter Users Forum

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

<http://www.msxgroup.com/2016-fall-forums>



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