

User Group Forums 2015

Management Reporter for Microsoft Dynamics® ERP

Intermediate Training Session I
Using the Migration Wizard

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



Hosted by:

MSXGROUP

With special presentations by the Microsoft CPM team

Presented by Noah Moseley

Management Reporter Intermediate Training Session - AGENDA

1:30pm-2:30pm EDT (10:30am-11:30am 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.



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Management Reporter for Microsoft Dynamics ERP

Management Reporter

WHEN
to migrate?

WHAT
to migrate?

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FRx

Migration Wizard

Management Reporter

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Management Reporter for Microsoft Dynamics ERP

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

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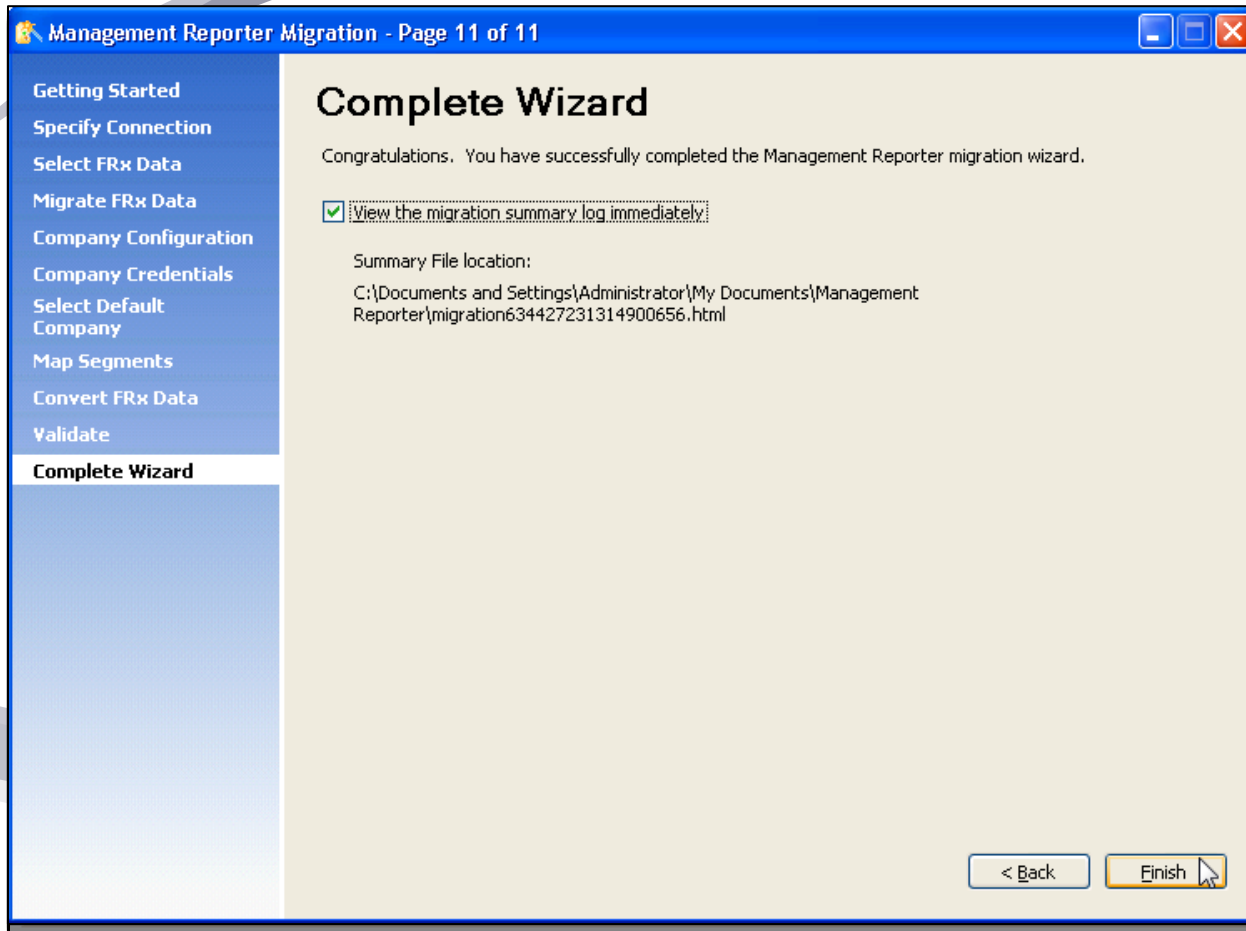


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Management Reporter

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

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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 2

Session starts at 2:45pm EDT/11:45am PDT

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