

User Group Forums 2015

Management Reporter for Microsoft Dynamics® ERP
Intermediate Training Session 2

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



Hosted by:

MSXGROUP

With special presentations by the Microsoft CPM team

Moderated by Nick Sercer

Management Reporter Intermediate Training Session - AGENDA

2:45pm-3:45pm EDT (11:45am-12:45pm PDT)

During this session, we will introduce Jill Carter and her discussion of Management Reporter newest and greatest features.

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

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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Management Reporter for Microsoft Dynamics ERP

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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Management Reporter for Microsoft Dynamics ERP

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 5 – Closing Q&A

Session starts at 4:00pm EDT/1:00pm PDT

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