MSX Group 2015 Spring User Forums

Q&A Session for Microsoft Forecaster

Questions	Answers
Can you change a Line Set or the Overrides after data has been entered?	Yes, you can change Line Sets for Input Default or Overrides. However, be careful not to remove an accounts from the input screen as it will still have data in the database. Remember, removing the account from the Line Set does not delete the account balance. It just doesn't display the balance on the input screen.
Can you set up an account to have a predefined spread method on annual amount based on a certain metric and then lock that spread method so that when the annual amount is entered it automatically spreads it based on the predefined method?	No, spread methods are not assigned to accounts specifically. A calculation that spreads the annual amount back to the months might be more appropriate.

For more information or help with this feature, please contact Support@msxgroup.com. |
| How can I do an 18- or 24- month rolling forecast within Forecaster? | You can add as many columns to a MultiRow Input Screen as needed.

However, this can be an issue if you are using the HR Detail Section. In this instance, it would be better if you make separate input screens by calendar. |
| Can we change the account numbers (only) once they are pasted into Forecaster? Also, can we edit the ID column only? | Yes, individual cell entries can be edited using the F2 keyboard button or by double-clicking the cell. |
| How many GL account segments can you have in Forecaster? | Forecaster allows up to 10 segments plus periods although we typically combine all non-account segments into the first segment. This is done mainly for security and ease-of-use for budget managers. |

Is there a way to make certain benefits ignore bonuses? For example, we don't make 401(k) contributions on bonuses, which would result in over-budgeting the 401(k) account by the match percent of the bonus.	Bonuses entered in the HR Detail section do generate benefit dollars. Unfortunately, there is no checkbox that will ignore bonus dollars for benefit calculations.
On the Multi Row tab, if Building rent increases 5% across all programs/departments, can you calculate it that way (by line item) across the infrastructure?	An account or group of accounts can be increased/decreased for any group of departments using the Adjustments Wizard (Setup>Budget>Adjustments). Similarly, a calculation could be setup for the Multi Row Input Screen.
We have some new administrators using Forecaster. How can we arrange detailed (intensive) training beyond this session?	Please email us at Training@msxgroup.com and see our website at www.msxgroup.com/training.
What do I need to do to be able to see all departments consolidated on one screen in the data input screen?	You can see all departments on one input screen if you select "Rows Are All Segments" on the pop-up window when you open the input set. If "Accounts" is your only option there, the Input Set definition window needs to be set to 'allow all segments'.
Will bringing in actuals using ExpressLink work correctly if I do not have my periods for actuals already defined in Forecaster?	Posting-level Periods must exist in Forecaster in order for ExpressLink to save balances in Forecaster.
Currently we do not have Forecaster licenses for our departmental managers. Can we buy more licenses? If so, can you describe how we can have each manager enter their budget directly? Currently we are importing the data from Excel.	Licenses are tied to your GL system. Microsoft only sells new licenses or more licenses to Dynamics GL users.
If there is no integration with GP, can you import your chart of accounts into Forecaster?	With FRx and prior version of GP, there was a connection to import the chart of accounts. With Management Reporter and new GP versions, there is not a connection to the GL chart of accounts and this will need to be copied into Forecaster.
Is there any potential in the future for the ability to export reports from Forecaster to Excel?	Reports can be copied and then pasted into Excel from Forecaster.

	Also, see using the Tools>Export option, you can select a report to export to HTML, which can then be opened in Excel. This will include the formatting as well.
Should we delete periods (prior data) we no longer use or is it okay to leave them in the system?	It's okay to leave older periods in the system. In many cases, there is little affect. However, over time, this may begin to impact performance as the database grows larger and customers with large amounts of transactions and data may need to delete or archive older periods to reduce database size and improve performance.
What is the future of Forecaster? Can we expect new releases (both service packs and additional functionality)?	Microsoft stated at Convergence that Forecaster is the Dynamics budgeting solution and is currently listed on the Dynamics price list. So, Forecaster will be here for several more years to come. However, Microsoft has not stated whether there will be any additional service pack plans.
Where do I add "Allow All Segments" to the definition window?	This is available on the Options tabs of the Input Set definition window as "Allow All Segments".
Can Forecaster integrate with Management Reporter? If there is no integration, can we import the trees in Management Reporter into Forecaster?	There is currently no integration and we cannot import trees between the products. Trees are created separately in Forecaster from Management Reporter. However, there is a Forecaster Data Transfer Tool that copies data from Forecaster to the GL so that Management Reporter can then report on that data.