

MSX Group Spring Forum

Forecaster Q&A

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Question	Answer
Can you import actual expenses for a prior year to compare to the new budget amount?	Yes, actuals can be imported into periods for actuals or even imported into the budget periods to start the budget process.
Do you have clients that use Microsoft Forecaster as the primary report generator in their organization?	Definitely. Even some very large organizations prefer the Forecaster Reporting capabilities over other reporting applications.
Do you have training specific to the Senior Care (Nursing Home, Assisted Living, and Independent Living) Industry?	We have worked with many industries, including Senior Care. All of our consultants have 10-15 years of experience implementing Forecaster and can assist you with training and best practices consulting. Please contact us at training@msxgroup.com for more information.
Does Microsoft Forecaster get any updates and what is the current release number?	Forecaster is currently version 7.0 SP5. Microsoft has not announced any additional update dates.
Does Microsoft still support Forecaster? I see at this time it is under extended support.	Yes. Forecaster is still supported and will continue to be for the foreseeable future (at least five years) as it appears on all of the latest price lists for GP, AX and SL.
How do you get the baseline [actuals] in the single row tab?	When you define your input sets, you designate your baseline column set. The baseline often contains actuals periods, but can be any periods you would like to include for comparison in the single-row tab of the input screen.
How does the web client for Microsoft Forecaster look like?	There are some small differences such as the menu options are displayed in a horizontal list instead of vertically. However, it is substantially similar to the client input and the menu options and functionality are the same.
How do I suppress lines with no amount?	Select Y (Suppress when Zero) in the Suppress column of the Line set. Tools>Options>Local Settings will allow you to Suppress either on Input or when running reports. Any Suppress settings defined at the line or column set level will override these settings
How would you rename the revenue tab?	Administrators can change that under Tools>Options>Custom Input.
I have customers concerned to implement this product since it has not been updated recently. Does anyone know what Microsoft's Plans for Forecaster are?	Microsoft will be supporting Forecaster for several more years to come. Forecaster is a successful budgeting and forecasting solution for your clients who have outgrown budgeting in Excel. Microsoft has not announced a replacement budgeting solution and still lists Forecaster as their budgeting solution of choice.

In your experience, is Forecaster also used with NON-Dynamics applications?	Yes. We have worked with hundreds of non-Dynamics Forecaster customers. However, at this time, Forecaster licenses are only available for Dynamics ERP customers.
Is it possible to have multiple period types like PERIOD (such as in GL) but also week numbers?	Yes, Periods can represent any time increment, month, week, quarter, year, day, etc.
Is Microsoft Forecaster just for budgeting and forecasting? Or, since ACTUAL can be included, can I use as separate reporting capability instead of MR?	Absolutely. A lot of our customers utilize Forecaster as a reporting tool, allowing users who do not have access to the GL or MR to be able to access reports such as Actual vs Budget variance reporting. You can also utilize forecaster as a place to store statistical account balances for reporting.
Is multi-company allocation for the 'shared services' group available at the report level?	Yes. Typically all Companies are defined in one Forecaster database.
Is there a way to combine two Segments to budget that combination?	Yes. There is a feature that allows you to select All Segments when you open an input screen. This allows you to view and interact with data from multiple centers on one screen.
On a line set, can you set up a blank space to only print if the prior line has data?	No, but you can use the BeforeSkip option in the Line Set to insert a blank line above a row.
The speaker is listing all these ways of limiting or restricting data entry. How does Forecaster provide detail when actual numbers include inappropriate combinations?	Actual periods are typically protected from these restrictions. For example, when actual data is loaded to Forecaster, we will protect the balances by locking the actuals periods by changing the Period type to H in the Period worksheet. In this way, it will prevent any calculations or other restrictions from overwriting your actuals balances.
This is great stuff. How much training material is available? Does the MSX Group have 'more efficient' training documents?	We work with a lot of Partners to provide training and implementation services so that their customers can benefit from Forecaster. Contact us at training@msxgroup.com for more information
We saw Noah perform data import. With Microsoft Forecaster Data Transfer Tool, can Microsoft Forecaster pull info from GP, or is it only a push to GP?	The Forecaster Data Transfer Tool only "pushes" data from Forecaster to your Dynamics ERP GL. However, it is very straightforward importing data from any source into Forecaster, especially when you can create a report in Management Reporter that approximates the format Forecaster needs for import.
What is the difference between an "I" income account and an "R" revenue account?	As far as Forecaster is concerned, there really isn't any. Balances for either type will be reversed if your settings require. The difference might come into play when assigning currency translation rates as you have the option to vary them by account type in Forecaster.
When building the center rollup, can you use an ID that does not exist in Microsoft Forecaster?	Yes, you may add ID's for any of your segments even if they do not exist in the general ledger's chart of accounts.
When importing data, most of the time you imported from Excel but one time it was sent to Notepad and	The Forecaster Import Wizard requires data to be imported from a .txt file. However, frequently, we will work with import files in Excel prior to saving as .txt in order to import.

then imported. When do you have to use Notepad?	
When would you use secondary calculation sets in input sets?	It's pretty rare, but it may come into play if you have to override automatic column calculations such as year-to-date periods.
When you are done with creating your budget, does the report easily load into GP?	The Forecaster Data Transfer Tool (downloadable from CustomerSource) easily facilitates the transfer of budget balances to the GL for reporting in Management Reporter.
When you do the close 2015, don't you get the HR 2016 set up elements to 'carry forward' and therefore we do not need to do the copy plan wizard?	There is no 'close' the year process in Forecaster that rolls things forward other than the Copy Plan Wizard that lets you copy data to the next year. You can mark the prior year as 'Completed' or 'Historical' but these do not move data to the new year. These only lock last year's budget.
Where can I access more of those assumption driven budgeting examples?	We recommend you look at the Forecaster Demo database by selecting 'Demo' in the Application dropdown on the login screen. This is a local Access database that contains a full functional implementation of Forecaster that includes many sample reports and setup examples.
Where can one find the current specifications for installing Forecaster? Everything that I can find seems old and outdated.	It hasn't been updated in a while that I know of. Basically, Forecaster will run on anything from Vista and up (including Windows 10). The Web version can leverage any Windows Server from 2008 and above. The SQL Server can be anything from SQL 2005 and above. Check out the Message Boards at MSXGroup.com (http://boards.msxgroup.com) for more information on installing on Windows 7 and 10 and in 64 bit environments.
Where do you color-format the detail when you add this to the CEN prompt?	All colors are controlled under Local Color Setting (Tools>Options>Colors and Fonts>Colors). These are default values defined to indicate certain data characteristics such as locked periods/columns, changed values, etc. Default fonts and shading can be overridden in certain circumstances in the Line and Column sets.