

Session starts at 1:30pm Eastern (10:30am Pacific)



Management Reporter
Forecaster
FRx
Prospero

User Group Spring Forums 2017

- Forecaster User Group Forum (Tuesday 3/14/17)
- Management Reporter User Group Forum (Wednesday 3/15/17)
- MSX Group Prospero User Group Forum (Thursday 3/16/17)

Register at www.msxgroup.com/2017-Spring-forums



User Group Forums 2017

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Prospero 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 Prospero Reporting
- Session 4: 2:45-3:45 Prospero Budgeting
- Session 5: 4:00-5:00 Additional Topics and Closing

Note: All times above listed in Eastern time



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Prospero 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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User Group Spring Forums 2017

Prospero

SESSION 4: Prospero Budgeting

Session starts at 2:45pm Eastern (11:45am Pacific)



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This session presented by Derek Krebs.

Prospero Budgeting - Agenda

Input Definition

- Lines & Entry Column
- Options: Line Items, HR, Capital
- Overrides
- HR setup: Pay Grades & Benefits
- Capital setup



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Product Demonstration

PROSPERO



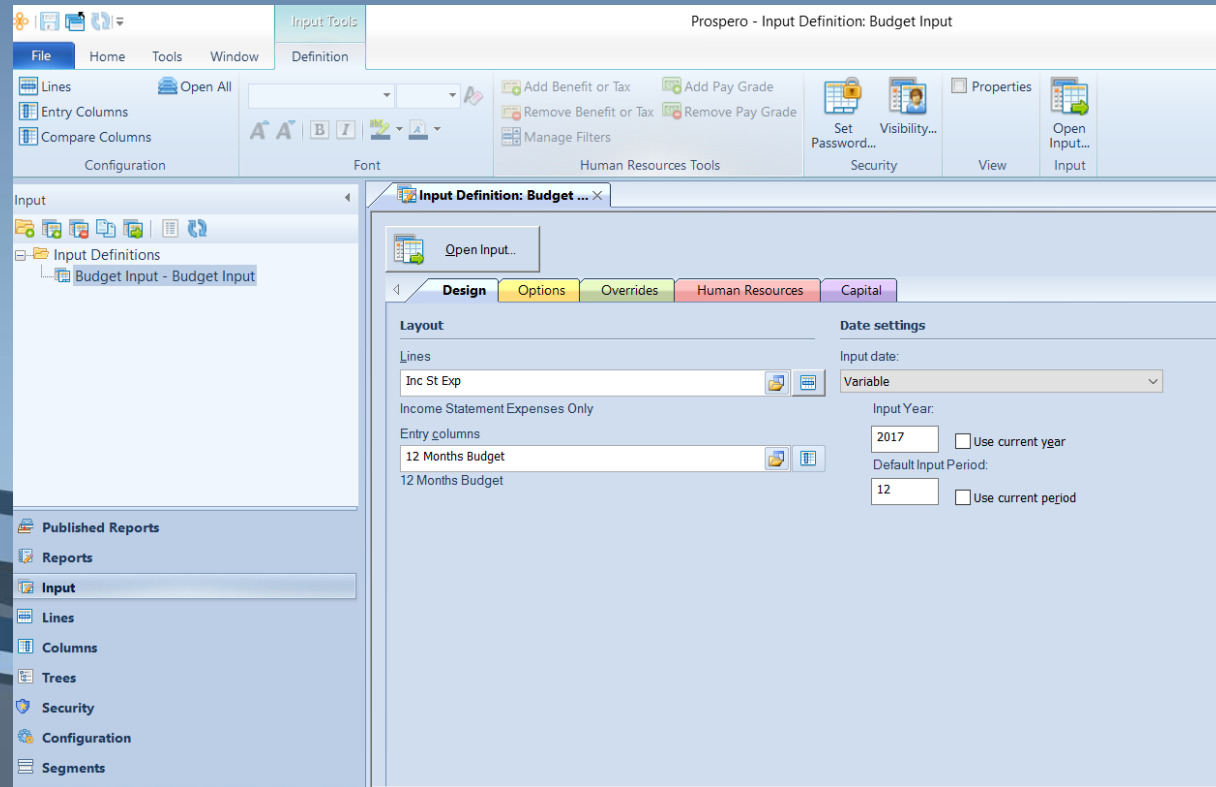
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Prospero Budgeting: Input Definition - Design tab

- Simply define a default Line set and Column
- Optional Overrides can be used for customized templates by Dept



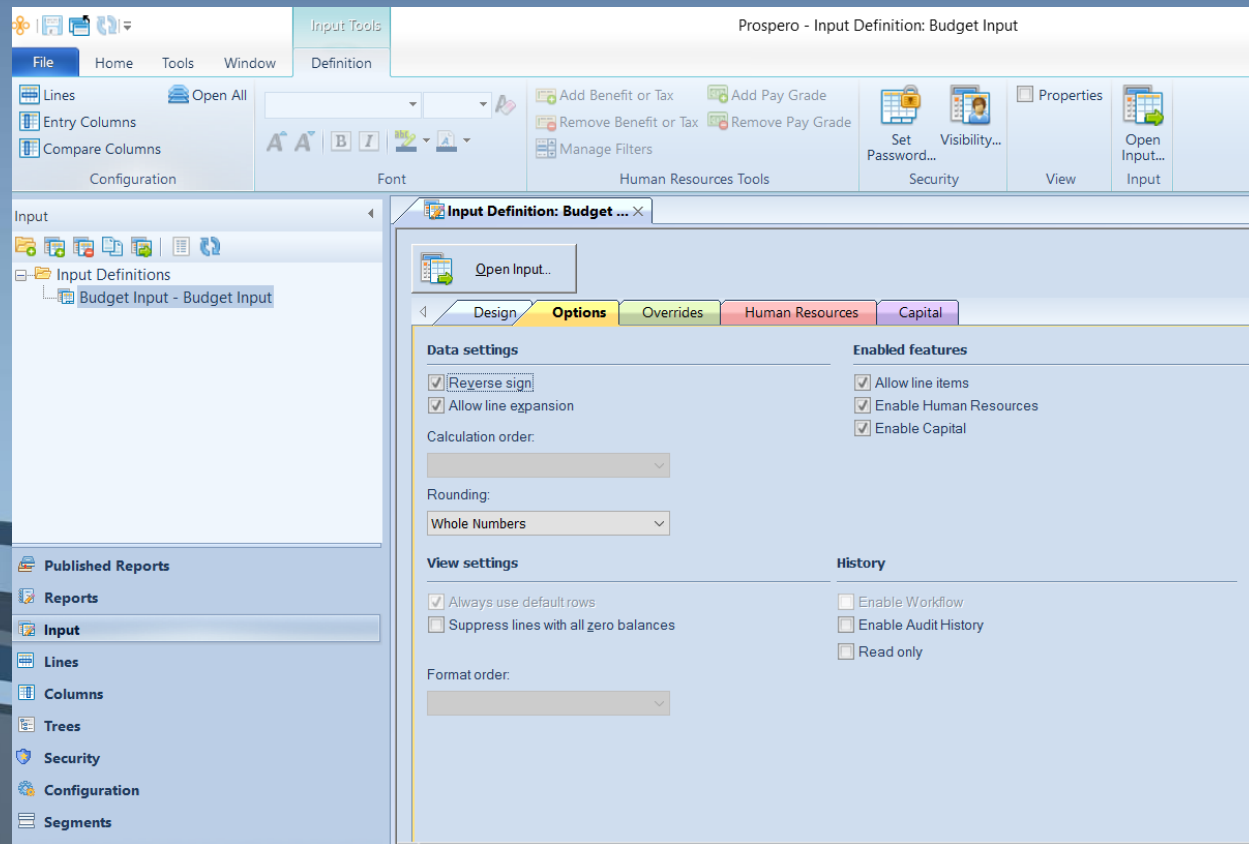
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Prospero Budgeting: Input Definition - Options tab

- Enable features: Line Items, HR and Capital
- Other options: reverse sign, allow line expansion, rounding, etc.



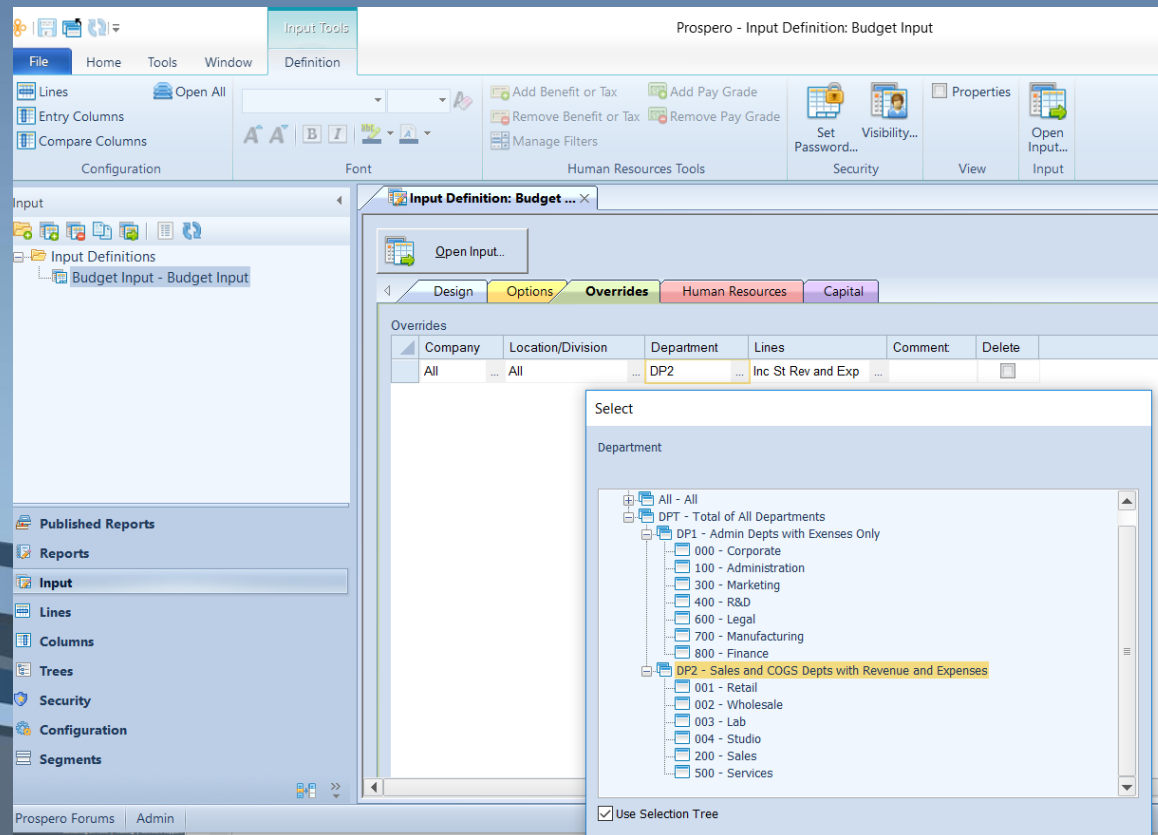
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Prospero Budgeting: Input Definition – Overrides tab

- Define unique and different line sets for certain Locations/Depts



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Prospero Budgeting: Input Definition – HR tab

- Create Pay Grades to define salary, bonus and overtime accounts
- Benefits and Taxes budget assumptions

Prospero - Input Definition: Budget Input

Human Resources Tools

Human Resources options

Benefit Options

Pay Grade Setup

| Pay Grade | Description | FTE Account | Hours | Headcount | Salary Account | Pay Rate | Type | Increase 1 | Increase Period 1 | Bonus Account | Bonus | Overtime Account | Overtime |
|-------------|-------------|-------------|-------|-----------|----------------|----------|--------|------------|-------------------|---------------|-------|------------------|----------|
| ADMIN STAFF | Admin Staff | XHR1 | XHR2 | XHR3 | 5000 | \$0.00 | Salary | 0.00% | 0 | | 0.00% | | 0.00% |

Benefits and Taxes

| Name | Label | Type | Result | Rate | Fixed Rate | Increment | Salary Limit | Benefit Limit | User Field 1 |
|--------------|------------------|---------|--------|----------|-------------------------------------|-----------|--------------|---------------|--------------|
| HEALTH | Health Insurance | Benefit | 5075 | \$800.00 | <input checked="" type="checkbox"/> | \$0.00 | \$0.00 | \$0.00 | |
| TAX_FICA | Tax - FICA | Benefit | 5070 | 6.20% | <input type="checkbox"/> | \$0.00 | \$128,000.00 | \$0.00 | |
| TAX_MEDICARE | Tax - Medicare | Benefit | 5070 | 1.45% | <input type="checkbox"/> | \$0.00 | \$0.00 | \$0.00 | |



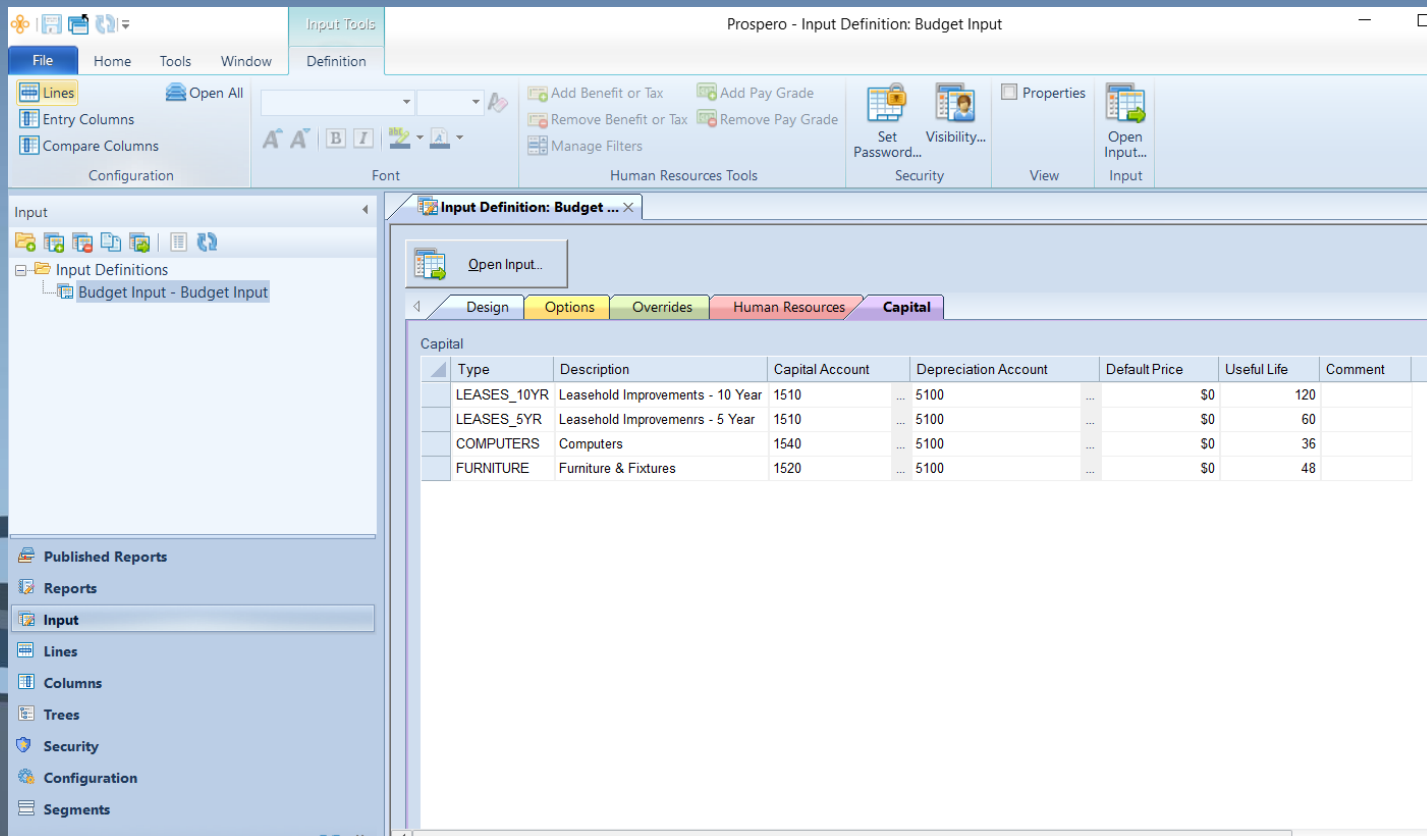
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Prospero Budgeting: Input Definition – Capital tab

- Define Capital account (balance sheet), Depreciation account (Inc St expense) and Useful Life (in months for deprecation expense)



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Prospero Budgeting: Budget Input – Main tab

- Input Account Balances, Line Items and Annotations/Notes

File

Home

Tools

Window

Tools

Lines

Columns

Compare Columns

Configuration

Definition

Open All

Insert...

Delete

Undo/Redo

Calculate

Annotate...

Insert Line Item

Expand Collapse

Line Items

Show Code

Show Label

Show Hidden Columns

Columns

Show Annotation Columns

Annotations

Show Hidden Lines

Display

Re-open Input...

Workflow...

Export to Excel

Information...

Information

Input

Input Definition: Budget Input

Budget Input: Prospero ...

Input Definitions

Budget Input - Budget Input

Published Reports

Reports

Input

Lines

Columns

Trees

Security

Configuration

Segments

Data Integration

14

Main

Human Resources

Capital

| | BUDGET | BUDGET | BUDGET | BUDGET | BUDGET | BUDGET | BUDGET | BUDGET | BUDGET | BUDGET | BUDGET | BUDGET | BUDGET | BUDGET | Prior Year | | | |
|--|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|---------|---------|------------|-----------|--|--|
| | JAN | FEB | MAR | APR | MAY | JUN | JUL | AUG | SEP | OCT | NOV | DEC | TOTAL | Actual | Variance | Latest | | |
| 1.42000.100 Prospero Demo-Denver Operations-Administration | | | | | | | | | | | | | | | | | | |
| Expenses | | | | | | | | | | | | | | | | | | |
| 5000 Salary Expense | 10,000 | 10,000 | 10,000 | 10,000 | 10,000 | 10,000 | 10,300 | 10,300 | 10,300 | 10,300 | 10,300 | 10,300 | 121,800 | | | 121,800 | | |
| 5050 Officers Comp | | | | | | | | | | | | | | | | | | |
| 5070 Payroll Taxes | 765 | 765 | 765 | 765 | 765 | 765 | 788 | 788 | 788 | 788 | 788 | 788 | 9,318 | | | 9,318 | | |
| 5075 Health Insurance | 1,600 | 1,600 | 1,600 | 1,600 | 1,600 | 1,600 | 1,600 | 1,600 | 1,600 | 1,600 | 1,600 | 1,600 | 19,200 | | | 19,200 | | |
| 5100 Depreciation Expense | 278 | 278 | 278 | 278 | 278 | 278 | 278 | 278 | 278 | 278 | 278 | 278 | 3,336 | 35,719 | | (32,383) | | |
| 5200 Office Expense | | | | | | | | | | | | | | | | | | |
| 5225 Supplies | | | 1,000 | | | 1,000 | | | 1,000 | | | 2,000 | 5,000 | 4,051 | | 949 | | |
| 5240 Maintenance | 3,500 | 1,500 | 3,500 | 1,500 | 3,500 | 1,500 | 1,500 | 1,500 | 1,500 | 1,500 | 1,500 | 1,500 | 24,000 | 6,236 | | 17,764 | | |
| 5. Lawn Care | 1,000 | 1,000 | 1,000 | 1,000 | 1,000 | 1,000 | 1,000 | 1,000 | 1,000 | 1,000 | 1,000 | 1,000 | 12,000 | | | 12,000 | | |
| 5. Cleaning Crew | 500 | 500 | 500 | 500 | 500 | 500 | 500 | 500 | 500 | 500 | 500 | 500 | 6,000 | | | 6,000 | | |
| 5. Machine Maintenance | 2,000 | | 2,000 | | 2,000 | | | | | | | | 6,000 | | | 6,000 | | |
| 5250 Rent | | | | | | | | | | | | | | | | | | |
| 5300 Travel | | | | | | | | | | | | | | | | | | |
| 5350 Advertising | 12,000 | 15,000 | 25,000 | 10,000 | 7,000 | 25,000 | 15,000 | | | 5,000 | | | 114,000 | 85,723 | | 28,277 | | |
| 5400 Commissions Expense | | | | | | | | | | | | 600 | 600 | 142,868 | | (142,268) | | |
| 5500 Income Tax Expense | | | | | | | | | | | | | | | | | | |
| 5650 Interest Expense | | | | | | | | | | | | | | | | | | |
| 7000 Income Tax | | | | | | | | | | | | | | | | | | |
| 8009 Earnings/(Loss) from FWE | | | | | | | | | | | | | | | | | | |
| 8888 Gain on Sale of Assets | | | | | | | | | | | | | | | | | | |
| 9999 Loss on Sale of Assets | | | | | | | | | | | | | | | | | | |
| SEXP Total Expenses | 28,143 | 29,143 | 42,143 | 24,143 | 23,143 | 40,143 | 29,466 | 14,466 | 15,466 | 19,466 | 14,466 | 17,066 | 297,254 | 274,597 | | 22,657 | | |
| HR Statistics | | | | | | | | | | | | | | | | | | |
| XHR1 FTE | 2.00 | 2.00 | 2.00 | 2.00 | 2.00 | 2.00 | 2.00 | 2.00 | 2.00 | 2.00 | 2.00 | 2.00 | 24.00 | | | 24.00 | | |

Prospero Summary

Admin

100%



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Prospero Budgeting: Budget Input – HR tab

- Human Resources tab for Salaries, Pay Increases, Bonus, Overtime and Benefits

Prospero - Budget Input: Prospero Demo-Denver Operations-Administration

File

Home

Tools

Window

Tools

Lines

Columns

Compare Columns

Definition

Open All

Insert...

Delete

Calculate

Annotate...

HR Master

Compensation Fields

Overtime Fields

Commission Fields

Benefits Fields

Reference Fields

Annotation Columns

Show FTE

Show Hours

Show Mixed

Annotations

Configuration

Input

View

Display

Input

Input Definition: Budget Input

Budget Input: Prospero ...

Main

Human Resources

Capital

Attributes

ID

Label

Pay Grade

Hire Date

Allocation

Start Period

End Period

Pay Rate

Increase 1

Increase Period 1

New Rate 1

Bonus

Bonus Period

Use Default Pay Rate

Use Default In

Z101

Bob Smith

ADMIN STAFF

3/9/2017

1.00

1

12

\$72,000.00

3%

7

\$74,160.00

0%

☐

Z102

Jane Doe

ADMIN STAFF

3/9/2017

1.00

1

12

\$48,000.00

3%

7

\$49,440.00

0%

☐

Published Reports

Reports

Input

Lines

Columns

Trees

Security

Configuration

Segments

Data Integration



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Prospero Budgeting: Budget Input – Capital tab

- Budget new Capital acquisitions

The screenshot shows the Prospero Budget Input - Capital tab interface. The main window displays a table with columns: ID, Description, Type, Purchase Date, Depreciation Start Date, Count, Price, and Use Default. The table contains two rows of data:

| ID | Description | Type | Purchase Date | Depreciation Start Date | Count | Price | Use Default |
|------|--------------------------------|-----------|---------------|-------------------------|-------|-------------|--------------------------|
| 1... | New Server | COMPUT... | 1/1/2017 | 1/1/2017 | 1 | \$10,000... | <input type="checkbox"/> |
| 1... | Reporting & Budgeting Software | SOFTWARE | 5/15/2017 | 5/15/2017 | 1 | \$15,000... | <input type="checkbox"/> |

The left sidebar shows the navigation menu with options: Input Definitions, Budget Input - Budget Input, Published Reports, Reports, Input, Lines, Columns, Trees, Security, Configuration, Segments, and Data Integration. The right sidebar shows the Annotations panel with a note: "Admin on 3/15/2017 9:08:23 PM: MSX Prospero purchase for Reporting and Budgeting software in one easy to use application".



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Training Classes

- Prospero Quick Start Training – Thursday, March 23, 2017 (8:00-2:00 PST)
- Prospero Quick Start Training – Thursday, April 20, 2017 (8:00-2:00 PST)

WWW.MSXGROUP.COM/REGISTER



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2017 Events

Amplify

a collaboration between



March 19-21, 2017
Anaheim, CA



May 7-12, 2017
St. Louis, MO



Sept 13-15, 2017
Tampa, FL



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October 10-13, 2017

Nashville 2017
Summit
AXUG | bring it home.

Nashville 2017
Summit
GPUG | bring it home.

Nashville 2017
Summit
NAVUG | bring it home.



Nashville, TN



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Fall User Forums

- **September 19, 2017** Forecaster Users Forum
- **September 20, 2017** Management Reporter Users Forum
- **September 21, 2017** Prospero Users Forum



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Thank you!

User Group Forums 2017

Prospero Users Forum

Up next: Prospero Session 5 (Q&A, New Features, Review)

Starts at 4:00pm ET/1:00pm PT



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