



**SPRING 2019**

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**SPRING 2019**

April 9, 2019

**Management Reporter  
Microsoft Forecaster**

April 10, 2019

**Prospero Reporting  
Prospero Budgeting**

April 9, 2019

# Management Reporter Microsoft Forecaster

11:00 AM EST

Management Reporter & D365 Financial  
Reporting: Introduction

12:15 PM EST

Management Reporter & D365 Financial  
Reporting: Beyond the Basics

1:30 PM EST

Microsoft Forecaster: Budgeting Overview

2:45 PM EST

Microsoft Forecaster: Advanced  
Budgeting

4:00 PM EST

Converting to Prospero



# SPRING 2019



**Nick Sercer**

[nick.sercer@msxgroup.com](mailto:nick.sercer@msxgroup.com)



- Financial Reporting, Budgeting & Analysis Specialists
- 20+ Years of Experience between Microsoft and the MSX Group

# Management Reporter & D365 Financial Reporting: Introduction

**11:00am-12:00pm EDT (8:00am-9:00pm PDT)**

During this session, we will cover a basic product overview of Management Reporter.

Presented by Nick Sercer([nick.sercer@msxgroup.com](mailto:nick.sercer@msxgroup.com))



# What is Management Reporter?

Management Reporter is a financial reporting solution which allows organizations to quickly and accurately generate their financial statements from their general ledger data including:

- Income Statements
- Balance Sheet Statements
- Cash Flow Statements
- Trial Balances
- Supporting Statements

# What is Management Reporter?

Management Reporter is designed to enable accounting and finance professionals to create and maintain their own reports.

- Streamlined reporting that doesn't require IT assistance
- Direct integration with the General Ledger
- If it's been recorded in the GL, you can report on it in MR
- Proven report design approach - FRx

# Management Reporter – Product Overview

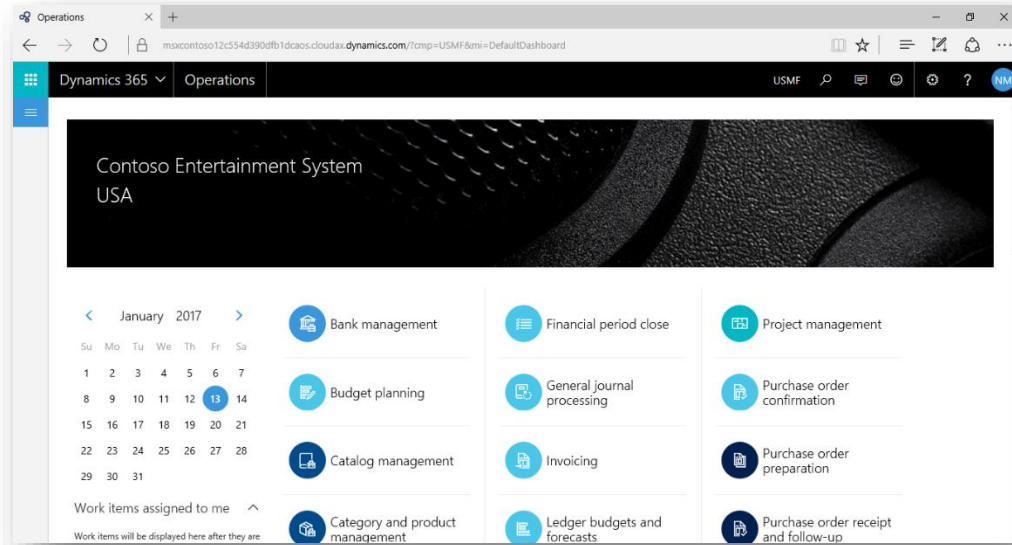
## Management Reporter Applications

- Report Designer
- Report Viewer (Library)
- Web Viewer
- Report Queue
- Migration Wizard

## Management Reporter Components

- SQL (1 Database; 2 if using DataMart)
- Services (Controls Security and Report Processing)
- Security is all via Windows Authentication
- Output Options (Excel, Printer, XPS)

# D365 For Operations – Financial Reporting



- Same Report Designer
- Access Reports via D365 Portal
- No link to Excel

# Management Reporter & D365 Financial Reporting: Introduction

## *Product Demonstration*



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In 15 Minutes.



