

Need assistance with your installation of Prospero, Management Reporter, Forecaster or FRx?

Our consulting services team can assist you with software upgrades, report building, budget setup, budget administration and more.

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(877) 456-7632



Spring 2024

Next Session Will Begin Soon



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Looking for training options for your installation of Prospero, Management Reporter, Forecaster or FRx?

We offer online, classroom and custom training for all these products.

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- All attendees are muted.
- Submit questions via GoToWebinar Questions section.
- Certificates of Attendance will be emailed to attendees for CPE credits.
- Click the arrow button to hide or unhide the GoToWebinar Control Panel.
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Spring 2024

Next Session Will Begin Soon



Spring 2024

March 19, 2024

Management Reporter
Microsoft Forecaster

March 20, 2024

Prospero Reporting
Prospero Budgeting

March 20, 2024

Prospero Reporting Prospero Budgeting

11:00 AM EST

Prospero: Introduction

12:15 PM EST

Reporting: Introduction

1:30 PM EST

Reporting: Advanced

2:45 PM EST

Budgeting: Introduction

4:00 PM EST

Budgeting: Advanced



Spring 2024



Derek Krebs, Sr Consultant
derek.krebs@msxgroup.com



- **MSX Group** is the original team who developed, implemented and supported FRx, Forecaster, and Mgt Reporter the past 30+ years working at FRx/MSFT/MSX.
- **Derek** has spent the last 30 years Consulting and Managing Consultants at Microsoft (15 yrs) & MSX Group (15 yrs) working strictly on Budgeting & Reporting Software.
- **Derek** has done over 300 client Implementations spanning 30 years; **MSX Group** has helped train, implement and support over 15,000 users!

Prospero uses interchangeable and reusable definitions when building Reports and Budget templates: 1) Lines, 2) Columns, 3) Trees

Rows defined in Row Definition

Fabrikam Works, Inc.
Income Statement
San Francisco Region
For the Eight Months Ending Wednesday, August 31, 2011

Fabrikam
INCORPORATED

Departmental type reports from Tree Definition

	<u>August</u>	<u>YTD</u>
Revenue		
Sales	285,652	2,185,635
Sales Returns	5,241	30,194
Sales Discounts	17,468	132,870
Net Sales	262,943	2,022,571
Cost of Goods Sold	173,379	1,318,795
Gross Margin	89,564	703,776
Operating Expenses		
Salaries and Wages	41,728	318,607
Office Expense	8,548	65,259
Rent Expense	6,076	46,387
Travel Expense	5,499	41,991
Total Operating Expenses	61,851	472,244
Net Income From Operations	27,712	231,531

Column content from Column Definition

BUDGETING

- Spreadsheet-style User Input Screens
- Detail Input Screens for Human Resources and Capital
- Line Item Details
- Notes
- Instant Consolidation

Budget: Prospero US-Denver Services-... X

Main | Human Resources | Capital |

Attributes								Compensation
ID	Label	Pay Grade	Hire Date	Allocation	Start Period	End Period	Pay Rate	
6	Bacon Jr., Dan K.	2	2/14/2017	0.50	1	12	\$45,000.00	
5	Akers, Kim	2	2/14/2017	1.00	1	12	\$45,000.00	
6	Alexander, Sean P.	1	2/14/2017	0.00	1	12	\$40,000.00	
2	Ackerman, Pilar	2	2/14/2017	1.00	1	12	\$45,000.00	
6	Atlas, Vivian	1	2/14/2017	1.00	1	12	\$35,000.00	

Budget: Prospero US-Denver Services-... X

Main | Human Resources | Capital |

	Jan	Feb	Mar	Apr	May
Year: 2018					
1-41000-100 Prospero US-Denver Services-Administration					
Salaries					
6000 Exempt Salaries	27,708	27,708	27,708	27,708	27,708
6010 Non-Exempt Salaries	833	833	833	833	833
6050 Bonus	3,490	3,490	3,490	3,490	3,490
6150 Overtime	12	12	12	12	12
7400 Commissions Expense	0	0	0	0	0
Total Salaries	32,044	32,044	32,044	32,044	32,044
9020 Headcount	8.00	8.00	8.00	8.00	8.00
9050 Hours	1,034.83	1,034.83	1,034.83	1,034.83	1,034.83
9010 FTE	5.98	5.98	5.98	5.98	5.98
Benefits & Taxes					
6240 Workers' Compensation	641	641	641	641	641
6250 Health Insurance	4,785	4,785	4,785	4,785	4,785
6260 Disability Insurance	200	0	0	0	0
6270 Tuition Reimbursement	0	0	0	0	0
6280 401k Employer Contribu...	0	0	0	0	0
6290 Life Insurance	150	150	150	150	150
7500 Income Tax Expense	2,451	2,451	2,451	2,451	2,451
6300 Other Benefits	0	0	0	0	0

ro Demo | Admin |

Common Budgeting Challenges with Excel:

- Too many spreadsheets, formulas, broken links
- Too much time to set up
- Difficult to collaborate without workflow, security and audit trail
- Data integrity, version control, consolidation

Prospero Solutions:

- **Quicker Budgeting Cycle**
 - Minimal year-to-year setup
 - No broken links, formulas, or separate, disparate spreadsheets
 - Powerful & easy rollups for quick consolidation or reorganization
- **Budget Control**
 - Centralized setup stored in database
 - Easy to Use! Microsoft Office navigation, Spreadsheet design

PROSPERO Budgeting Introduction

AGENDA

- Budget Navigation and Input
- Steps for Creating a New Budget or Forecast
 - Update Calendar to include future periods
 - Book Codes (Create/Enable Input/Restrict Years)
 - Column Definition (Create Periods/Define Book/Copy Existing)
- Line Definition
 - Use Build function to define rows by account
 - Use Trees and Expand feature for low maintenance Input
 - Reuse Existing Line Definitions
- Create Input Definition
 - From Scratch
 - Copy Existing Input Set
 - Transfer Data with Copy Plan
 - Input Data and Report

PROSPERO Budgeting Introduction

OTHER ITEMS:

- User Input Restrictions (Assignments/Visibility)
- Reporting on Budget Data
- Utilizing Trees Effectively (Expand/Summary, Reporting/Drilldown)
- Quick Launch

PROSPERO Budgeting Introduction

RECAP

- It's Easy to Create a New Budget
- Once Defined, Budget Input Sets can be Reused Year after Year
- Building Blocks can be Reused or Copied – Be smart about your setup and annual maintenance will be minimal
- Trees are Your Friend!



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