Report Design in Management Reporter 2.0 for Microsoft Dynamics ERP

This course provides students with the knowledge and skills to build basic and advanced financial statements using Management Reporter. Management Reporter is a financial reporting and analysis application to replace FRx Financial Reporting. Management Reporter retains many elements of FRx but is built on SQL architecture that provides greater scalability and reliability for customers. Microsoft FRx customers making the transition to Management Reporter will experience a variety of new features including the following:

- Direct integration to the Microsoft Dynamics GP general ledger. This integration aids in simplified, real-time reporting with greater accuracy.
- Reusable building blocks. Blocks of Report, Row, Column and Tree definitions can be mixed and matched to produce a wide variety of boardroom-quality reports.
- A Report Library. A Report Library is where reports can be secured, stored, and viewed.

Audience Profile

This class is designed for individuals who create, modify, secure and publish financial management reports. This course is intended for end users, IT professionals or accounting professionals who build and maintain the organizations financial report package.

At Course Completion

After completing this course, students will be able to:

- Explore the demonstration company and sample reports
- Export the sample reports as a template for their own report design
- Design basic report building blocks in Report Designer including:
  - Row definitions
  - Column definitions
  - Reporting tree definitions
- Associate the building blocks in a variety of report definitions including:
  - Trial Balance reports
  - Income Statements
  - Variance reports
  - Balance Sheets
  - Statements of Cash Flow
  - Consolidation reports
- Discover the power and flexibility of reporting trees to present financial results at the responsibility level (i.e. by dimensions)
- Apply worksheet linking to report on data maintained in Microsoft Office Excel
- Use report output and distribution options including Report Viewer
- Implement Security including customized roles, groups and users
- Design reports that support XBRL
- Use the Report wizard to create reports