

Essentials I in Microsoft Forecaster 7.0

Course 8862: Two days; Instructor-Led

Introduction

Elements of this syllabus are subject to change.

The two-day Microsoft Forecaster 7.0: Essentials I course explores the product and its functionality from the basic setup to preparing budget templates. This course shows you the segment setup, data loading, input set setup, and additional detail setup. Learn how to make budgeting exciting and efficient with Microsoft Forecaster 7.0.

A thorough understanding of these topics allows you to successfully use Microsoft Forecaster 7.0. You learn to navigate around the user interface, use and set up the features, and add details to your budget.

Audience

Essentials I is recommended for budget administrators and partners who will be using or implementing Microsoft Forecaster 7.0. This course, plus Essentials II and Supplemental Training is the recommended learning plan for new budget administrators and partners.

At Course Completion

After completing this course, students should be able to:

- Set up Segments, Rollups, and Periods
- Import Data
- Build Input Sets
- Enter data using copy and grow shortcuts and data entry shortcuts
- Set up Human Resources
- Enter and Import employees
- Set up Capital Types and enter Capital purchases
- Build a Revenue model and enter data

Microsoft Certified Professional Exams

No Microsoft Certified Professional exams are associated with this course currently.

Course Materials

The student courseware includes a comprehensive workbook and other necessary materials for this class.

Course Outline

Chapter 1: Overview and Demonstration

This chapter gives students a general overview and demonstration of the product. The demonstration is designed to highlight the key features covered in the two-day course.

Main Topics

- Demonstrate key features of Microsoft Forecaster 7.0
- Overview of topics in course

After completing this chapter, students should be able to:

- Discuss the topics that will be covered in the two-day course

Chapter 2: Training Assumptions

This chapter introduces the organizational structures of the fictitious training companies, naming conventions, and basic navigation of the product.

Main Topics

- Training companies organizational structure
- Period Naming Conventions
- Basic Navigation

After completing this chapter, students should be able to:

- Discuss the organization of the training companies
- Identify the naming conventions used for Periods
- Determine the basic icons, menus, and toolbars

Chapter 3: Application Setup

This course explores using the new application wizard to define the company name and segment structure. In addition students learn about the number of Segments, and how to update Segment information after the wizard completes.

Main Topics

- New Application Wizard
- Segment Definition
- Segment Modifications

After completing this chapter, students should be able to:

- Step through the New Application Wizard
- Determine number of Segments to be used
- Assign properties to Segments
- Modify Segments after wizard

Chapter 4: Segments and Rollups

This chapter defines the Segments and their properties, creates Rollups, and reviews Rollup options. The chapter focuses on the fields and functionality of Segments and Rollups, and time is spent building multiple Rollups.

Main Topics

- Center Segment
- Center Rollup
- Rollup Navigation, Properties, and Maintenance
- Account Segment
- Account Rollup

After completing this chapter, students should be able to:

- Populate Segments
- Create Rollups for each Segment
- Maintain Rollups

Chapter 5: Periods and Loading Data

This chapter provides an overview of the ways to store and load data, including file preparation. The chapter focuses on creating Periods and the Data Import Wizard is used to import balances. Time is spent verifying data.

Main Topics

- Period Fields
- Period Wizard
- Data Import
- Import Errors

After completing this chapter, students should be able to:

- Create Periods in the worksheet and with the Wizard
- Modify Periods
- Prepare an import file
- Import Data
- Verify data import

Chapter 6: Input Screen Setup

This chapter provides an introduction to Input Sets and their related building blocks. The chapter focuses on how building blocks determine the display of the Input screen, which includes Columns, Lines, and Calculations.

Main Topics

- Input Set Overview
- Columns
- Sections
- Lines
- Calculations
- Input Set Definition
- Locked Accounts

After completing this chapter, students should be able to:

- Create Columns, Lines and Calculations
- Use building blocks to create an Input Set
- Modify Input Set Options
- Lock Accounts from input

Chapter 7: Account Input

This chapter reviews active icons on the toolbars, as well as a variety of data entry methods on both the Multi Row and Single Row tabs of the Input screen.

Main Topics

- Input Set Selection
- Toolbars and Icons
- Spread Methods
- Multi Row Data Entry shortcuts
- Multi Row Data Entry Memos
- Multi Row Data Entry Line Items
- Single Row Data Entry

After completing this chapter, students should be able to:

- Open an Input Set
- Recognize icons
- Enter data on the Multi Row and Single Row tabs
- Create Spread Methods

Chapter 8: Human Resources Setup and Input

This chapter steps through setting up Human Resources using Pay Types, Salary Grades, and Benefits. Employees are added through manual entry and by importing. Time is spent modifying screen layouts and creating custom Human Resource benefits. The Human Resources Master is explored, which shows users how to distribute employees and promote them.

Main Topics

- Human Resources Setup
- Pay Types
- Salary Grades
- Benefits and Taxes
- Human Resources Input and Import
- Human Resources Distribution and Human Resources Master
- Custom Human Resources

After completing this chapter, students should be able to:

- Set up Human Resources
- Input and import employees
- Distribute and promote employees
- Use Human Resources Master
- Customize Human Resources screens

Chapter 9: Capital Setup and Input

This chapter provides a review of Capital Types, including depreciation methods. Students enter data to the Capital tab and review the results.

Main Topics

- Define Capital Types
- Depreciation Methods

- Capital Input

After completing this chapter, students should be able to:

- Define Capital Types
- Determine Depreciation Method
- Input Capital data

Chapter 10: Custom Setup and Input

This chapter provides an overview of the Revenue Setup screen, along with design customization options. Time is spent entering data to the Revenue tab using two methods of data display, and reviewing the results.

Main Topics

- Custom Dimensions
- Define Markets and Products
- Create Product Lines and Calculations
- Associations
- Define Products and Rates
- Revenue Input
- Secondary Calculations

After completing this chapter, students should be able to:

- Rename Revenue dimensions
- Design a Revenue model using Markets, Products, and Rates
- Create associations between Centers, Markets, and Products
- Input Revenue
- Create Secondary Calculations

Chapter 11: Advanced Input

This chapter explores Input Set modification and advanced input options. The chapter focuses on creating overrides for the Input Set and using multiple Segments in the Input Set. Time is also spent reviewing Local Settings, Guidelines, and other data entry methods.

Main Topics

- Local Settings
- Guidelines
- Input Set Overrides
- Multi Segment Input
- Input Shortcuts
- Other Data Entry Methods

After completing this chapter, students should be able to:

- Change local settings and upload Guidelines
- Create Input Set Overrides
- Use Multi Segment Input
- Apply Input shortcuts on the Multi Row screen
- Identify other data entry methods

Chapter 12: Input Examples

This chapter is an overview of advanced input screen designs that use calculation functions. The chapter focuses on the use of the Calculation Functions @LOOKUP and If/Then statements. Time is also spent looking at an additional Custom Input design.

Main Topics

- Global Rates
- @LOOKUP
- If/Then Calculations
- Custom Units and Rates

After completing this chapter, students should be able to:

- Discuss other Input screen design scenarios
- Use the @LOOKUP and @IF Calculation functions
- Identify other uses for Custom Input

Chapter 13: Security Overview

This chapter introduces the Group security options, including Users, Assignments, and the approval hierarchy. The chapter highlights the optional Workflow functions, and is an introduction to Security, which is covered in more detail in the Microsoft Forecaster 7.0: Supplemental guide.

Main Topics

- Groups
- Users
- Assignments
- Workflow

After completing this chapter, students should be able to:

- Security Group setup and privileges
- Users and Assignments
- How to use the Workflow process

Chapter 14: Web Access Overview

This chapter provides a high level overview of the optional Web Access functionality. The chapter focuses on an overview of the installation, sign on, and interface of the Web Access.

Main Topics

- Web Access Install and Configuration
- Web Access Sign On
- Web Access interface

After completing this chapter, students should be able to:

- What the Web Access is
- The requirements for Web Access

Chapter 15: Practice

This chapter provides students with an opportunity to set up a practice company. The chapter gives students a challenge in setting up what they learned over the two-day class. Files are provided for the student to practice with. The chapter contains high level and step by step instructions, so the user can practice at their own comfort level.

Main Topics

- Define Segments
- Import Data
- Build Input Set
- Define Revenue
- Set Up Human Resources

After completing this chapter, students should be able to:

- Work comfortably in the application

Appendix A: Microsoft Forecaster Menu Structure

This appendix includes documents like navigation roadmaps, special character list, and reserved words in Microsoft Forecaster 7.0.

Main Topics

- Menu Structure
- Special Characters
- Reserved Words