



Microsoft® Forecaster 7.0 | New Features

Microsoft® Forecaster 7.0 is the fast, affordable way to realize the benefits of budgeting and planning. This product release was designed to fulfill customer requests for a quicker implementation process, a more tailored user experience, and provide more control to improve business performance.

Quicker Implementations

Windows Authentication

Microsoft Forecaster 7.0 now supports Microsoft® Windows® authentication, in addition to standard Microsoft Forecaster authentication. With Windows authentication, users can access Microsoft Forecaster using the same login information that they use to sign into Windows. Users no longer have to remember additional login and password information to access Microsoft Forecaster, while Budget Administrators no longer have to distribute and maintain user names and passwords for their organization. This saves your organization time and ultimately results in a more secure solution.

User Experience

A new user interface has been created for Microsoft Forecaster 7.0, based on the design and functionality standards established by Microsoft® Office Excel®. This change provides the simplified navigation and intuitive functionality users have become accustomed to from Microsoft applications, while providing a consistent experience inside Microsoft Forecaster and across other Microsoft products. The improved user experience and a familiar working environment save your organization time and shorten the learning curve.

Standard Toolbar and Navigation

Helpful Symbols

ACCOUNT	Label	Jan Cur Yr	Feb Cur Yr	Mar Cur Yr	Apr Cur Yr	May Cur Yr	Jun Cur Yr	Jul Cur Yr	Aug Cur Yr	Sep Cur Yr
UNITS SOLD										
SUNITSA	Sales Units - Prod A	7,000	7,000	7,000	7,000	7,000	7,000	7,000	7,000	7,000
SUNITSB	Sales Units - Prod B	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000	5,000
SUNITSC	Sales Units - Prod C	3,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000
REVENUE										
4100	Sales	235,000	235,000	235,000	235,000	235,000	235,000	235,000	235,000	235,000
4250	Sales Discounts	(11,750)	(11,750)	(11,750)	(11,750)	(11,750)	(11,750)	(11,750)	(11,750)	(11,750)
4110	Sales Returns	(2,350)	(2,350)	(2,350)	(2,350)	(2,350)	(2,350)	(2,350)	(2,350)	(2,350)
TNETREV	Net Revenue	220,900	220,900	220,900	220,900	220,900	220,900	220,900	220,900	220,900
COGS										
4500	Raw Materials	127,500	127,500	127,500	127,500	127,500	127,500	127,500	127,500	127,500
TGMRG	Summary Gross Margin	93,400	93,400	93,400	93,400	93,400	93,400	93,400	93,400	93,400
OPERATING EXPENSES										
5200	Office Expense	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200	1,200
5115	Postage	10,192	9,209	10,192	9,883	10,192	9,883	10,192	10,192	9,883
5225	Supplies Expense - Service	1,154	1,154	1,442	1,154	1,154	1,442	1,154	1,154	1,442
5240	Maintenance Expense - Service	550	550	550	550	550	550	550	550	550
5300	Other Expense	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000
5120	Trade Shows	2,000	2,000	2,000	2,000	2,000	2,000	2,000	2,000	2,000
5300	Travel Expense	6,000.00	6,000.00	6,000.00	11,000.00	11,000.00	11,000.00	11,000.00	11,000.00	11,000.00
HR EXPENSE										
5000	Salary Expense	23,604	23,604	23,604	23,604	23,604	23,604	23,604	23,604	23,604
5060	Bonuses	2,465	2,465	2,465	2,465	2,465	2,465	2,465	2,465	2,465
5000	Payroll Taxes	2,191	2,191	2,191	2,191	2,191	2,191	2,191	2,191	2,191

Communicate with others in the budget process

Based on: 4250 (Current)

In Progress

Ready

Supporting Information Budget Administrator Reporting Period 04



Continued...

Enhanced Rollup Capabilities

Microsoft Forecaster 7.0 enables Budget Administrators to efficiently create and maintain rollups – the parent-child relationships that control how your data is summarized for reporting, allocations and adjustments. Support for multi-select, drag, drop and delete operations, and the ability to view accounts that do not belong to any rollup have been included. Users can specify a range of accounts to be included in a rollup, and any new accounts that fall within the range will automatically be included without manual intervention. These features streamline the creation and maintenance of rollups, shorten implementation time, and ultimately help preserve the accuracy of your organization's information.

Tailored User Experience

Human Resource Enhancements

Changes to details like employee names can now flow through the Human Resources input screens, if the Budget Administrator desires. Data entry enhancements also enable Budget Administrators to vary employee salary grades when distributed across account segments, allowing for greater accuracy of the overall plan. Additional improvements like the ability to change names of fields, hide field names, and the ability to specify the order in which the fields are displayed have also been included. These enhancements save your organization time and improve the accuracy of employee information.

Additional Account Segments/Dimensions

When setting up new companies, Microsoft Forecaster 7.0 now includes the flexibility to let you define up to ten segments to match your general ledger chart of accounts. Segments can be defined to match the types of analysis that users need to accomplish and can be created in any order during the set up of the application. This functionality provides your organization with the ability to capture and analyze your information in a manner that makes sense to you, and provides the insight to understand how effectively your resources are being used.

Formatting Control

Microsoft Forecaster 7.0 offers additional control over the appearance of completed budgets. New numeric formats, fonts, colors, conditional formatting and print formatting options are available to Budget Administrators to accommodate the preferences of their organization, and the options carry through to the printed reports. This makes data analysis a quicker and easier process.

Control to Improve Business Performance

Data Entry

Microsoft Forecaster 7.0 has improved the data entry experience by enabling users to have multiple input screens and reports open at any given time. Further, several toolbar icons have been added to assist users through the data entry process. Helpful symbols to the left of the input rows and supporting information on the lower portion of the screen have also been added to streamline data entry. Additional functionality includes the option to allow multiple segments as rows for input and automatic calculations. These features shorten the data input learning curve, which can result in more time for analysis.

Workflow

The Microsoft Forecaster 7.0 Workflow feature allows for a customizable approval process. A new Workflow status screen has been added to enable your Budget Administrator to create and maintain workflow statuses effortlessly. Optional reason codes can be added to each step in the process, so that when a status changes, those involved in the approval process understand why. These enhancements give Budget Administrators greater control and insight into the budgeting process, while keeping budget contributors on track.

Reporting

Microsoft Forecaster 7.0 allows you to design reports in virtually any format you like to present your data. Budget Administrators can add any segment to any part of a report (segments can be concatenated and any segment or time period can be used in the columns or rows) and colors, fonts and formatting are all customizable. Enhanced printing capabilities allow Budget Administrators to customize the layout of the printed page, and control the order, width and spacing of the columns on the page. These new features allow users to immediately see trends in their business, enabling them to make well-informed decisions, manage costs and predict trends.

For more information about Microsoft Forecaster 7.0, visit our web site at www.microsoft.com/forecaster