Collaborating with Colleagues Overview

Corporate forecasting often requires collaboration among colleagues. Perhaps your manager wishes to review your forecasts and make a few changes. Perhaps you want to run your forecasts past the sales force who may know about pending orders. Perhaps your business has distinctly different markets that require specific individuals to work on specific markets. Whatever the reason, it is often useful to work with others to establish the final forecasts.

In this lesson we will explore how Forecast Pro supports collaborative forecasting. There are three basic strategies for working with others to establish the final forecasts:

(1) Sharing a single stand-alone project

Sharing a stand-alone project is a straightforward way to work with one or two other individuals to establish the final forecasts. Using this approach, the forecaster begins by creating forecasts for all items that need to be forecasted, enters any desired overrides and saves a project—often to a shared folder. The project can then be opened by anyone using Forecast Pro (Forecaster or Collaborator licenses) to review, make changes, etc. If there is a third individual who needs to review the project, that person would do so after the second individual has updated the project. Only one person at a time can access a project, so the changes must be performed sequentially.

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(2) Using Forecast Pro's Excel Collaboration facility to incorporate forecast adjustments made in Excel

Forecast Pro's Excel Collaboration functionality allows you to create *Forecast Pro Collaboration Spreadsheets* which enable members of your team to view and modify your Forecast Pro forecasts in Excel. Any forecast overrides and comments created in Excel can then be imported back into your Forecast Pro project. This process allows multiple individuals to make changes simultaneously, allows you to define which items each person has access to and allows the individuals to work in Excel

rather than Forecast Pro. The pre-formatted collaboration spreadsheets support numeric and graphical display of the history, forecasts and overrides, and include automated item-lookup capability. The Excel Collaboration Manager in Forecast Pro allows you to easily manage the collaborative forecasting process by providing the import/export capabilities and maintaining a record of all collaboration spreadsheets associated with your Forecast Pro project including their current status.

Please note that the Forecast Pro Add-In is required for editing Collaboration Sheets. The Forecast Pro Add-In is included in all licensed product installs, meaning anyone with a Forecast Pro license can edit the *Forecast Pro Collaboration Spreadsheets*.

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(3) Using Forecast Pro's Project Collaboration

Project Collaboration allows you to create "child projects," Forecast Pro projects that contain subsets of your project's items and can be worked on separately within Forecast Pro. Adjustments generated in the child projects can then be imported into your project, the "parent project." This process allows you to define what items each person has access to, allows multiple individuals to make changes simultaneously to the separate child projects, and allows the individuals to work in Forecast Pro.

To implement this approach, you first create the parent project, reading in historic data for all items, and then create child projects using the Project Collaboration dialog. The child project "inherits" all data for the items it is assigned and can also import additional "optional" data (e.g., helpers, explanatory variables, external data etc.). However, the child project's historic data *must* be updated from the parent project. If forecasting is enabled in the child project and the child project uses a Forecaster license, new baseline forecasts can be generated in the child project and imported into the parent project. Overrides can be made in the child project with a Forecaster or Collaborator license and then imported into the parent project. Project collaboration is an excellent way to break up a project into more manageable components and then consolidate baseline and final forecasts for all items in a single "parent" project.

The primary differences between using Project collaboration and using Excel collaboration are that when using Project collaboration, the collaborating individuals are working in Forecast Pro and can make changes to the baseline forecasts and when using the Excel collaboration approach, they are working in Excel and can only make overrides.

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