Excel Collaboration Overview

Excel Collaboration · https://dev.forecastpro.com/documentation/forecast-pro-trac/excel-collaboration/excel-collaboration-overview/

> Forecast Pro TRAC only

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*.