Editing Child Projects in Forecast Pro

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> Forecast Pro TRAC only

To make changes in a child project, simply open the child project in Forecast Pro. The child project uses the same Forecast Pro interface, but there are a few differences to note:

1. You are not allowed to update your historic demand data directly from the child project. If you open the Data Manager, you will notice that you are unable to change the Historic Data drop-down and the Read and Forecast button is grayed out. You may add optional data (e.g., helpers, explanatory variables etc.) to your child project using the Data Manager, if desired.
2. Groups that are above the hierarchy level at which the child project was created are “locked.” If a group is locked, a locked icon will appear next to the group on the Navigator, and you are not able to make overrides or model (if forecasting is enabled) that group. For example, if you have a 4-level hierarchy with Total, Category, Customer and SKU as your attributes (in that order) and you create child projects at the Customer level, you will not be able to make changes to the Total or Category groups in your child project(s).
3. You are unable to reorder the hierarchy or change the units. If you look at the Operations tab on the ribbon menu, you will notice that the Reorder the Hierarchy icon is grayed out and the Units drop-down is unavailable.

Overrides in the Child Projects

You may make overrides to all available (e.g., not “locked”) items using The Override View. Making overrides in a child project works just like it does in all Forecast Pro projects. You may edit the override grid however you like. When child project overrides are imported into the parent project, all child projects override values are consolidated into a single row, as described in Importing Child Projects.

Working with Child Projects without Forecasting Enabled

When you open the override grid, you will see that the Baseline forecast row is labeled *Parent Baseline Forecast*. This is the baseline forecast that was defined in the parent project. You are not able to assign an alternative baseline if forecasting is not enabled. Making overrides in the child project works the same as it does for all Forecast Projects (see Overriding your Forecasts).

You are also able to view the Parent Final Forecast, if desired, by using the Add or Remove button in the Override settings. Differences between the Parent Baseline and Parent Final forecasts indicate that there are parent overrides. Note that these parent overrides will take precedence over any overrides made in the child project.

Finally, you may add Conversion, External Data, Filters and Overrides files to you child project using the Data Manager. All other Data Manager fields are used to support forecasting and are not available.

Child project functionality without forecasting enabled is the same for Forecaster and Collaborator licenses.

Working with Forecasting Enabled Child Projects

You will need to open the child project with a Forecaster license to access this functionality. Opening a forecasting enabled child project with a Collaborator license will work like a child project without forecasting enabled.

When you open the override grid, you will see that the Baseline forecast row is labelled *Statistical*. When forecasting is enabled, you may choose an alternative baseline forecast assignment and/or change the statistical forecast models. You may also read in any additional optional data needed for custom models. When the child project is imported to the parent, the child project's baseline forecast will be imported and applied for the items in both the child and parent projects. See Customizing Your Forecasts for an overview of how to customize forecasting models in Forecast Pro and see Specifying the Baseline Forecast for an overview of how to assign alternative baseline forecasts.

Making overrides in the child project works the same as it does for all Forecast Projects (see Overriding your Forecasts).

You are also able to view the Parent Baseline and Final forecasts, if desired, by using the Add or Remove button in Override settings. Differences between the Parent Baseline and Parent Final

forecasts indicate that there are parent overrides. Note that these parent overrides will take precedence over any overrides made in the child project.