Saving Reports

> Marked content is Forecast Pro TRAC only

Forecast Reports

Forecast Reports can be saved to Excel. You can save these reports for the currently displayed item, all items on the Hot List or all items forecasted. The Excel workbook will include a separate worksheet for each item. These reports are convenient if you wish to present the forecasts and/or models used to colleagues.

Each report contains the information found in the current Forecast Report view and (optionally) the graph defined by the Graph 1 settings.

You can specify the format and content of the Forecast Report using Forecast Report Settings and Graph 1 Settings. You can open the settings dialog from the hamburger or context menu on the Forecast Report and Graph 1 views. The operation of the Forecast Report Settings and Graph Settings dialog boxes are described in The Forecast Report View and The Graph Views.

You save a Forecast Report from the **Export** tab. First, select if you want to export the report for All Items, the Hot List or the items currently included in the report. Then click the small **Forecast Report** icon.

Item Reports

*Item Report*s can be viewed on-screen and saved to Excel. These reports can contain Pareto information, statistical output such as the forecasting model specification and summary statistics as well as time series output such as history, forecasts, fitted values and confidence limits. You can use the context menu or hamburger menu to control the items included in the report (e.g. all items, the currently selected item or only items in the current hot list). This is true for all global reports.

To open an Item Report, you click the **Item Report** icon on the Reports tab. You save an Item Report from the **Export** tab. First, select if you want to export the report for All Items, the Hot List or the items Currently Displayed in the report. Then click the small **Item Report** icon.

You can specify the format and content of the report using Item Report Settings. You can open the settings dialog from the hamburger or context menu on the Item Report. The operation of the Item Report Settings dialog box is described in The Item Report View.

Outlier Reports

Outlier Reports can be viewed on-screen and saved to Excel. These reports list the items where outliers have been detected and/or corrected. You can use the context menu or hamburger menu to control the items included in the report (e.g. all items, the currently selected item or only items in the current hot list). This is true for all global reports.

To open an Outlier Report, click the **Outlier Report** icon on the **Reports** tab. You save an Outlier Report from the **Export** tab. First, select if you want to export the report for All Items, the Hot List or the items Currently Displayed in the report. Then, click the small Outlier Report icon.

The content and format of the report is controlled using the Outlier Report's context menu. Please see The Outlier Report View for details.

Override Reports

Override Reports can be viewed on-screen and saved to Excel. These reports list the items where overrides and/or comments have been made with a time stamp and the user who made the override/comment. You can use the context menu or hamburger menu to control the items included in the report (e.g. all items, the currently selected item or only items in the current hot list). This is true for all global reports.

To open an Override Report, click the **Override Report** icon on the **Reports** tab. You save an Override Report from the **Export** tab. First, select if you want to export the report for All Items, the Hot List or the items Currently Displayed in the report. Then, click the small **Override Report** icon.

You can specify the format and content of the report using Override Report Settings. You can open the settings dialog from the hamburger or context menu on the Override Report. The operation of the Override Report Settings dialog box is described in The Override Report View.

[TRAC] Tracking Reports

Forecast Tracking Reports can be saved to Excel. You can save these reports for the currently displayed item, only items on the Hot List or all items forecasted. The Excel workbook will include a separate worksheet for each item. These reports are only available if the database includes at least one archived forecast for the given item.

You can specify the format and content of Forecast Tracking Reports using **Tracking Report Settings**. You can open the settings dialog from the hamburger or context menu on the Tracking Report. The operation of the Tracking Report Settings dialog box is described in The Tracking Report and Tracking Report Graph Views.

You save a Forecast Tracking Report from the **Export** tab. First, select if you want to export the report for All Items, the Hot List or only the item Currently Displayed in the report. Then click the small **Forecast Tracking** icon.

You can print a tracking report for the currently selected item by clicking **Print this Page** from the Tracking Report view's context menu. You can also save an Excel report for the currently displayed item using the **Save this page to Excel** option on the Tracking Report view's context menu or hamburger menu.

[TRAC] Exception Reports

Exception Reports list the items where your forecast error or some other performance metric has fallen outside of an acceptable range. Exception reporting reduces the need for manual review of your forecasts and allows you to focus on the items where human attention is most needed. You can use the context menu or hamburger menu to control the items included in the report (e.g. all items, the currently selected item or only items in the current hot list). This is true for all global reports.

There are six types of Exception Reports: *Forecast vs. History, Forecast vs. Archive, Forecast Accuracy, FVA Global, Waterfall* and *Custom*. *Exception Report*s can be viewed on-screen and saved to Excel. The details of each of the Exceptions Reports is described in The Exception Report Views.

To open an Exception Report, click the **Reports** tab icon for the specific Exception Report you want to view. Note that you can have all six reports open at the same time.

You save an Exception Repot from the **Export** tab. First, select if you want to export the report for All Items, the Hot List or the items currently included in the report. Then, click the small icon for the

Exception report (*Forecast vs. History, Forecast vs. Archive, Forecast Accuracy, FVA Global, Waterfall* or *Custom*) you want to save.

You can specify the format and content of the report by selecting **Settings** on the Exception Report's hamburger or context menu. The operation of each Exception Report Settings dialog box is described in The Exception Report Views.

[TRAC] Mapping Reports

Product Mapping Reports include a record of how, when and by whom mapped history in your project was created. Please see The Mapping Report for more details. You can use the context menu or hamburger menu to control the items included in the report (e.g. all items, the currently selected item or only items in the current hot list). This is true for all global reports.

You can save a Mapping Report from the **Export** tab. First, select if you want to export the report for All Items, the Hot List or the items currently included in the report. Then, click the small **Product Mapping Report** icon. Alternatively, you may select *Save this Page to Excel* from the hamburger or context menu.