Home Tab

Forecast Pro Ribbon Tabs · https://www.forecastpro.com/documentation/forecast-pro-trac/forecast-pro-ribbon-tabs/home-tab/

> Marked content is Forecast Pro TRAC only

Forecast Pro's most frequently used commands are available on the **Home** tab.

Layouts: On the left-hand side of the **Home** tab is the Layouts group. The **Layouts** drop-down is used to select a saved layout to display. Above the drop-down are four small icons for **adding**, **managing**, **updating** and **removing** layouts. Please see details in the "Working with Layouts" section of the *Advanced Navigation* lesson in *Forecast Pro TRAC Tutorials* or Working with Layouts in this reference.

Data Manager: To the right of the Layouts group is the **Data Manager** icon. The Data Manager is used to read data into the project. Once data is read in, the Navigator displays all items to be forecast, and the Hot List becomes available for use. Graphs will also become available after data has been read in. Consult Using the Data Manager for details.

Graphs: Click on the **Graph** icon to open a graph view for the item selected in the Navigator. Up to four additional graphs may be added to the view window by selecting *Add Graph* on the Graph icon's drop-down. Finally, you may select *Diagnostics* on the Graph drop-down to open the Diagnostics view. Details for how to work with the Graph and Diagnostic views are in The Graph Views and The Diagnostics View.

Overrides: The **Override** icon opens the Override view which allows you to adjust forecasts for the selected item. Consult The Override Forecasts View for details.

Forecast Report: The **Forecast Report** icon opens the Forecast Report. The Forecast Report view displays the forecasting model, within-sample statistics, historic data and forecasts for the selected item. If you are using a holdout sample, the Forecast report view will also include an out-of-sample evaluation section. Details for using the Forecast Report view are in The Forecast Report View.

[TRAC] Forecast Tracking: Clicking on the **Forecast Tracking** icon) opens the Tracking Report view. Note that Forecast Tracking is only available if there are archived forecasts (forecasts generated in prior periods). The drop-down on the **Forecasts Tracking** icon allows you to open the Tracking Graph and access the Tracking Report settings. Consult The Tracking Report and Tracking Report Graph Views.

Numeric Output: The **Numeric Output** icon provides a quick way to save your Numeric Output in a single click. Numeric Output Files can contain time series output such as history, forecasts, fitted values and confidence limits as well as statistical output such as the forecasting model specification and summary statistics. These files can be saved in text, spreadsheet, ODBC or XML formats. You can include output for either all items forecasted or just for the Hot List. If you will be importing the forecasts into another application, you will likely do so with the Numeric Output file.

The drop-down on the **Numeric Output** icon allows you to open the Numeric Output view (select *Show*) and the settings associated with the Numeric Output file. The Numeric Output view displays the contents and format of the currently specified Numeric Output file, which can both be adjusted using the Numeric Output settings. You do not need to display the view in Forecast Pro to adjust the settings. Consult The Numeric Output View and Numeric Output Files for more details.

[TRAC] Excel Collaboration: The **Excel Collaboration** icon opens the **Excel Collaboration Manager** dialog box. From this dialog box, you can create, update and import Excel-based Forecast Pro collaboration sheets. Once created, the collaboration sheets may be distributed to users with a valid Forecaster or Collaborator license. Using the Forecast Pro Excel Add-in, users may review the forecasts and make overrides in Excel. The edited files can then be imported back into the Forecast Pro project, which will then contain the consolidated overrides from all imported files. Excel Collaboration is a fast and easy way to collaborate with multiple colleagues in parallel. Please consult the Collaborating with Colleagues tutorial or Excel Collaboration in this reference.

[TRAC] Project Collaboration: The **Project Collaboration** icon opens the **Project Collaboration Manager** dialog box. From this dialog box, you can create, update, and import Forecast Pro collaboration child projects. Once created, the child projects may be distributed to users with a valid Forecaster or Collaborator license. Users may review the forecasts, change the statistical and baseline forecasts and make overrides in Forecast Pro. The child projects can then be imported back into the Forecast Pro parent project, which will then contain the consolidated baseline forecasts and overrides from all imported child projects. Project Collaboration is a fast and easy way to collaborate

with multiple colleagues in parallel or break a large, processing intensive project into multiple more manageable child projects. Please consult the Collaborating with Colleagues tutorial or Project Collaboration in this reference.

Options: The **Options** icon opens the Options dialog box. This dialog box controls project-level settings. Typically, you will want to set your options when you are starting a project. Please consult Forecast Pro Options for details.

Auto Arrange: Forecast Pro allows you to open multiple views in the View Window. These views may be resized and arranged as you wish. The **Auto Arrange** icon (with drop-down) tiles the open views horizontally. This can be helpful when you open a new view. Given that auto arrange is often used after opening a new view, the **Auto Arrange** icon is available on the Quick Access Toolbar by default.

Recalculate: This option is only available when *Manual override mode* or *Manual forecast mode* is selected on the Performance tab of the Options dialog box (see The Performance Tab). Selecting recalculate will reconcile all forecasts and overrides in the project.