

5.14. Collaborating with Colleagues

The demand forecasting process usually involves several persons in the company, if not a separate department. Thus, working together with colleagues plays an important role in the forecasting and planning process.

Collaboration in Streamline means communication with colleagues offline when several demand planners approve the forecasts asynchronously. This process can also include [adjusting the statistical forecasts](#) and [amending the actual sales](#). To recall or find out why a particular override was made, Streamline allows you to add an annotation to it.

Annotations can be made on an item and an adjusted value. Streamline automatically tracks who and when the annotation was added or last edited. Adding notes to one project allows all persons involved in the demand forecasting process to track changes added by colleagues.

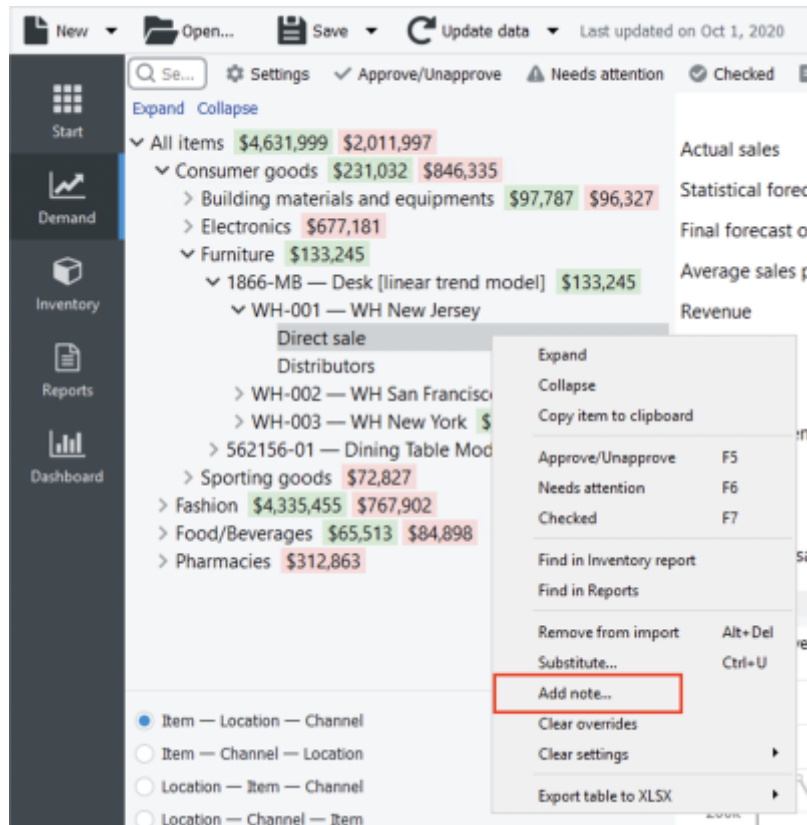
First of all, go to the menu **File > Setting** and set up your **User name** in the **General** tab.

Annotations to items

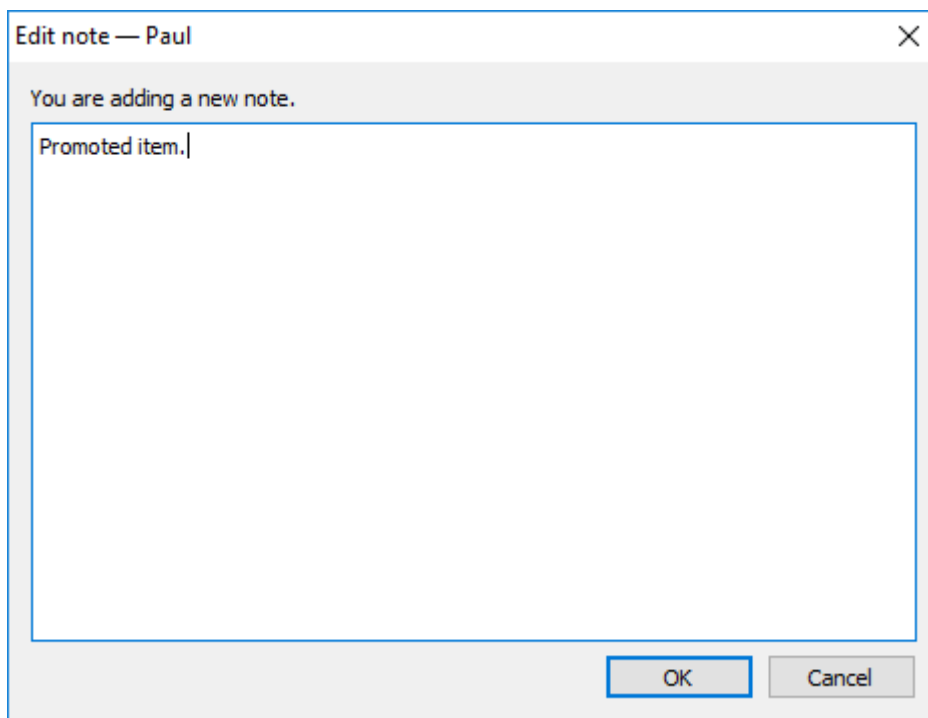
When you [add changes](#) to an item or [approve the forecast](#), you can add a note for your colleagues that is visible in the **Tree view**. The notes can be added at the SKU and [planning item](#) levels of the **Tree view**. This section describes how to add, edit and remove a note for the **Tree view** nodes.


Adding annotation

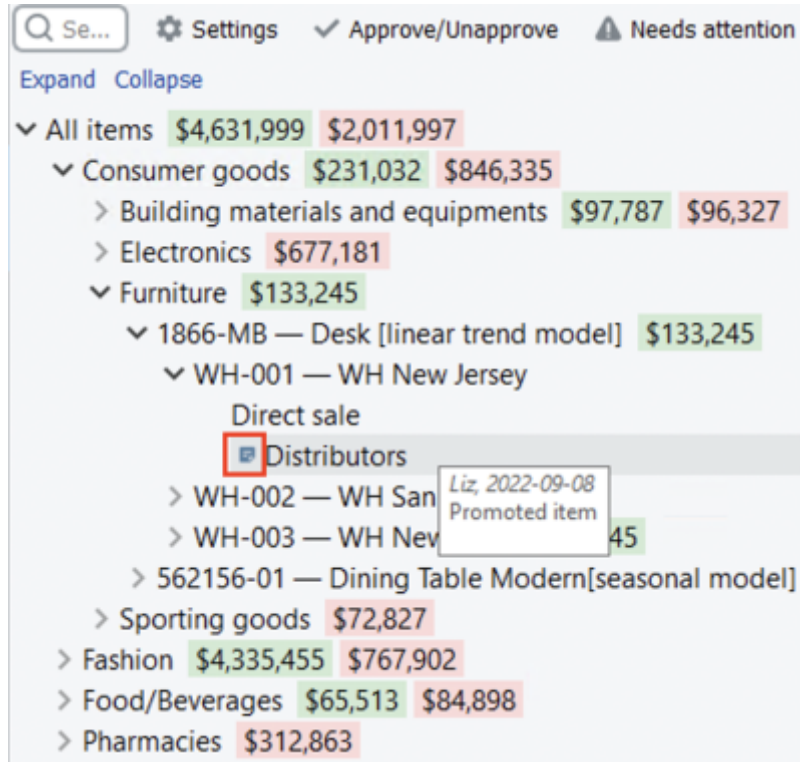
1. Go to the **Demand forecasting** tab.
2. Select the SKU or the planning item in the **Tree view** (we select a planning item here).
3. Click on the **Add note** button of the **Demand forecasting** toolbar or select the **Add note...** command from the node's context menu.



4. Enter your note in the dialog that appears and click **OK**.



A little note icon  is added to the annotated node in the **Tree view**. The content of the note can be viewed in the **Tree view** by hovering the mouse pointer over the node.



Annotated planning items are also indicated by a green triangle in the [Reports](#) and [Inventory planning](#) tabs.

New filter		All items							
Search		Settings	Report	Ordering plan	Value	Aggregate by	None	Export report	Show columns
	Approval	Status	Item category	Item category 2	Item code	Description	Location	Location description	
1	Unapproved	Undecided	Pharmacies	Pharmacies	05-T48	Cold & Flu Tablets [s...	WH-001	WH New Jersey	
2	Unapproved	Undecided	Pharmacies	Pharmacies	05-T48	Cold & Flu Tablets [s...	WH-001	WH New Jersey	
3	Unapproved	Undecided	Pharmacies	Pharmacies	05-T48	Cold & Flu Tablets [s...	WH-002	WH San Francisco	

Notes to planning items can be also added, edited or removed in the **Reports** and **Inventory planning** tabs. To add a note, do the following:

1. Go to the **Reports** or **Inventory planning** tab.
2. Right-click on the line with the planning item you want to add a note.

Item category 2	Item code	Description	Local
Pharmacies	05-T48	Cold & Flu Tablets [s...	WH-001
Pharmacies	05-T48		
Pharmacies	05-T48		
Pharmacies	05-T48		
Pharmacies	05-T48		
Pharmacies	05-T48		
Furniture	1866-MB		
Furniture	1866-MB	Desk linear trend m...	WH-001

Filter by...

Copy item to clipboard

Find in Inventory report

Find in Reports

Remove from import Alt+Del

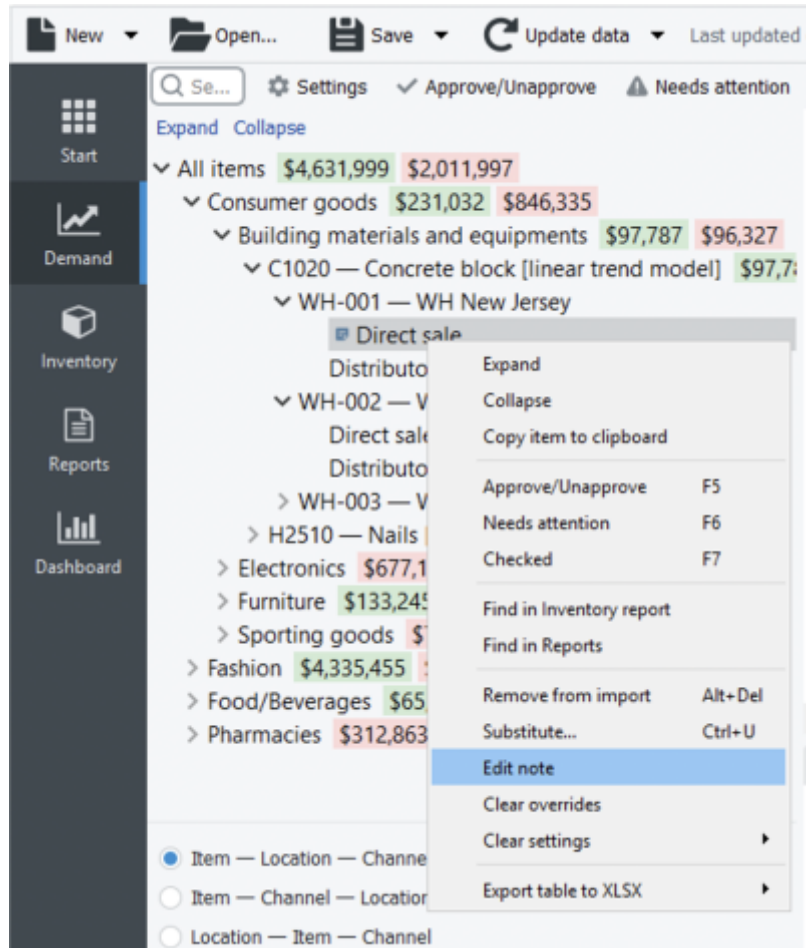
Substitute... Ctrl+U

Add note...

3. Select the **Add note...** command in the context menu.
4. Enter your note and click **OK**.

Editing annotation

1. Go to the **Demand forecasting** tab.
2. Select the SKU or the planning item in the **Tree view**.
3. Click on the **Add note** button of the **Demand forecasting** toolbar or select the **Edit note** command from the node's context menu.



4. Make changes to the comment and click **OK**.

Removing annotation

1. Go to the **Demand forecasting** tab.
2. Select the SKU or the planning item in the **Tree view**.
3. Click on the **Add note** button of the **Demand forecasting** toolbar or select the **Edit note** command from the node's context menu.
4. Clear the comment and click **OK**.

Annotations to overrides

Streamline allows you to add notes to the [forecast adjustments](#) and [actual sales overrides](#). This section describes how to add, edit and remove a note for the overridden cell.

Adding annotation

1. Go to the **Demand forecasting** tab.
2. Right-click on the overridden cell in the **Table** and choose the **Add note...** command from the menu.

1273	1254	971	1219	1389
	1300			
3.99	3.99			99
5278.77	5187.00			542.11
0				

- Add note...
- Propagate value
- Export to XLSX

3. Enter your comment and click **OK**.

Edit note — Paul ✕

You are adding a new note.

Promotion,|

After the annotation is added, a little green triangle appears in the upper right corner of the cell indicating an annotated cell. The content of the note can be viewed by hovering the mouse pointer over the cell.

1273	1254	971	1219
	1300		
3.99	3.99		
5278.77	5187.00		81

Paul, 2017-08-15
Promotion.

Editing annotation

1. Go to the **Demand forecasting** tab.
2. Right-click on the overridden cell in the **Table** and choose the **Edit note** command from the menu.

1273	1254	971	1219	1389
	1300			
3.99	3.99			9
5278.77	5187.00			2.11
0				

Edit note
Propagate value
Export to XLSX

3. Make changes to the comment and click **OK**.

Removing annotation

1. Go to the **Demand forecasting** tab.
2. Right-click on the annotated cell and choose the **Edit note** command from the menu.
3. Clear the comment and click **OK**.

[Next: Forecast Versions](#)

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