7.10. Reports Tab

The **Report tab** allows you to create several reports. These reflect historical, current, and projected data for demand forecasting and inventory planning.

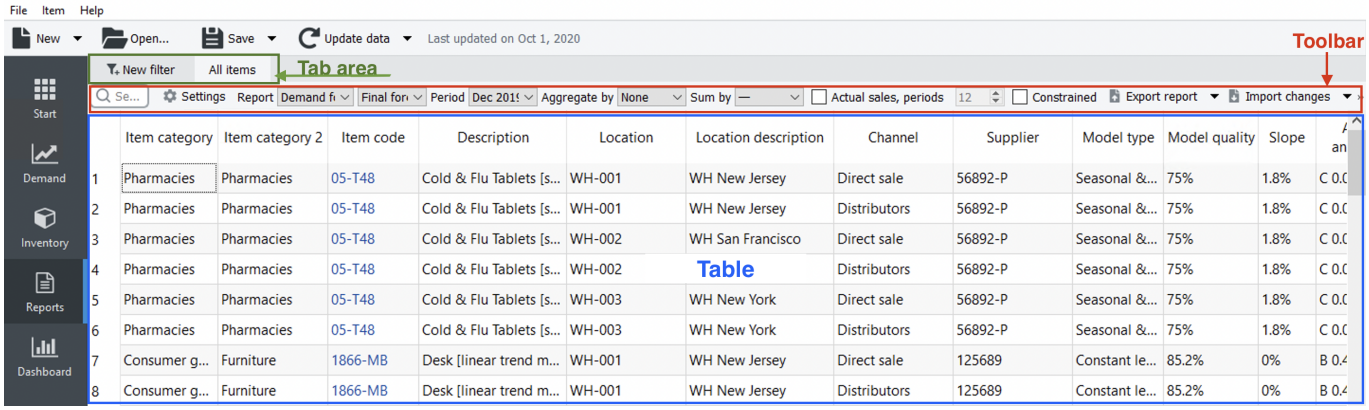
Streamline has powerful tools for creating *customized* reports. Users can display a specific group of items by applying filters to each report type as well as selecting which columns of the reports to display. Moreover, users can aggregate the filtered result by rows and/or columns and make your overrides for custom reports at an aggregated level.

The **Report tab** includes (see figure below):

It means that Streamline automatically stores the last generated forecasts for each data aggregation period in the project archive. That enables you to go back to a particular period in the past and see what was the data of the mentioned reports at that time.

The **Report tab** includes (see figure below):

- tab area displaying the **All items** report and (optionally) your custom reports;
- a toolbar containing controls to customize currently active reports; and
- a table showing the report's data.



	Item category	Item category 2	Item code	Description	Location	Location description	Channel	Supplier	Model type	Model quality	Slope	
1	Pharmacies	Pharmacies	05-T48	Cold & Flu Tablets [s...	WH-001	WH New Jersey	Direct sale	56892-P	Seasonal &...	75%	1.8%	C 0.0
2	Pharmacies	Pharmacies	05-T48	Cold & Flu Tablets [s...	WH-001	WH New Jersey	Distributors	56892-P	Seasonal &...	75%	1.8%	C 0.0
3	Pharmacies	Pharmacies	05-T48	Cold & Flu Tablets [s...	WH-002	WH San Francisco	Direct sale	56892-P	Seasonal &...	75%	1.8%	C 0.0
4	Pharmacies	Pharmacies	05-T48	Cold & Flu Tablets [s...	WH-002		Distributors	56892-P	Seasonal &...	75%	1.8%	C 0.0
5	Pharmacies	Pharmacies	05-T48	Cold & Flu Tablets [s...	WH-003	WH New York	Direct sale	56892-P	Seasonal &...	75%	1.8%	C 0.0
6	Pharmacies	Pharmacies	05-T48	Cold & Flu Tablets [s...	WH-003	WH New York	Distributors	56892-P	Seasonal &...	75%	1.8%	C 0.0
7	Consumer g...	Furniture	1866-MB	Desk [linear trend m...	WH-001	WH New Jersey	Direct sale	125689	Constant le...	85.2%	0%	B 0.4
8	Consumer g...	Furniture	1866-MB	Desk [linear trend m...	WH-001	WH New Jersey	Distributors	125689	Constant le...	85.2%	0%	B 0.4

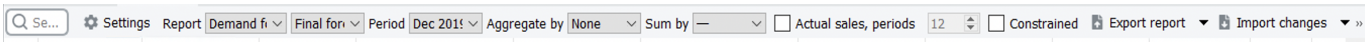
Tab Area

By default, the tab area shows the **All items** tab and the **New filter** button. The **All items** tab is a report showing all planning items (no filters applied) for the report type selected in the Report control of the toolbar.

The **New filter** button opens the Filter dialog. It is used to create a custom report based on the selected report type and filtering criteria specified in the **Filter** dialog. As soon as you configure the filter, Streamline creates a new report based on it and adds it to the set of tabs as a newly created tab.

Toolbar

The **toolbar** holds buttons and controls to customize the currently active report. The exception is the Show columns control; it shows columns for all reports. The toolbar changes depending on the selected report type and displays controls that apply to this type. Below we list toolbar elements, which differ for each report, but the shown one is the most comprehensive and can be found in the Demand forecasting report.



- **Search** in the toolbar is used to look out for a particular phrase in the **Item code**.
- **Settings** button opens the reports settings.
- **Description** columns of the currently active report. It is not case-sensitive and looks for the substring in a string. To start or find the next occurrence, press **Enter** or **F3** or click on the corresponding icon.
- **Report** drop-down is used to set up the report type for the currently active report. All report types fall under three categories:

- Historical reports – display information from the past.
- Current state reports – show indicators that are calculated as of now.
- Projections reports – demonstrate what may happen in the future based on the historical data.

Below, you may find report types and the categories they belong to.

- **Aggregate by** drop-down allows you to group rows of the active report by one or several columns.

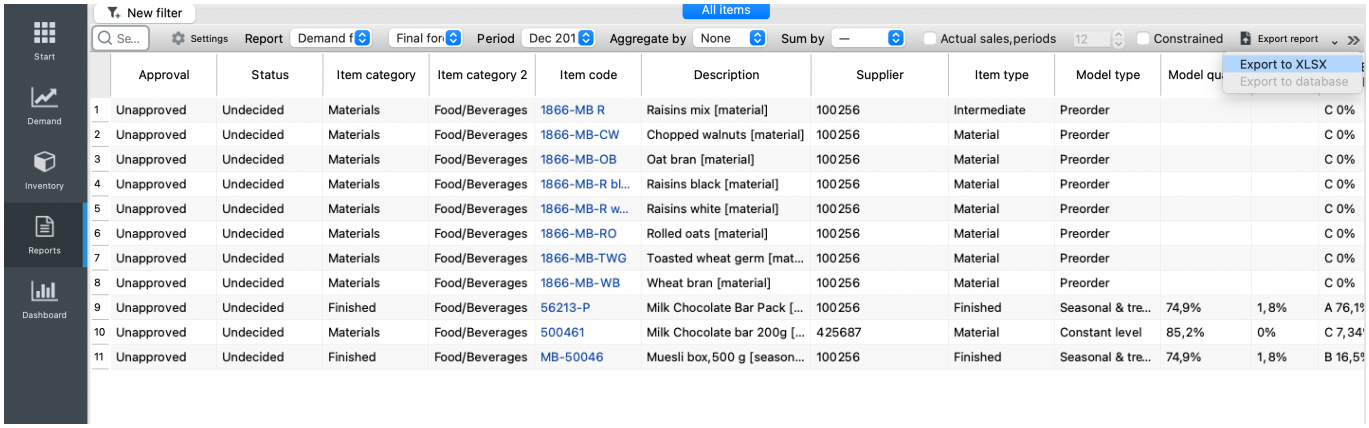
These are:

- Item code
- Item category
- Location
- Channel
- DC, Supplier
- ABC analysis
- All

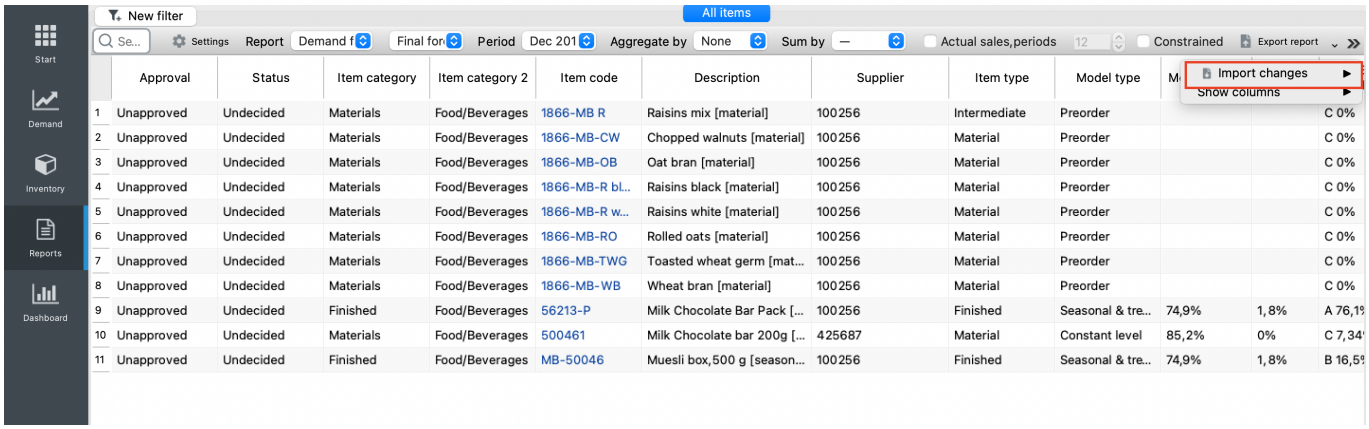
- **Export report** button exports the currently active report to a newly created Excel file.
- **Import changes** button allows users to apply overrides to the reports. It imports the Excel file created using the Export report button beforehand.

To accomplish the **export/import scenario**, the user has to take the following steps:

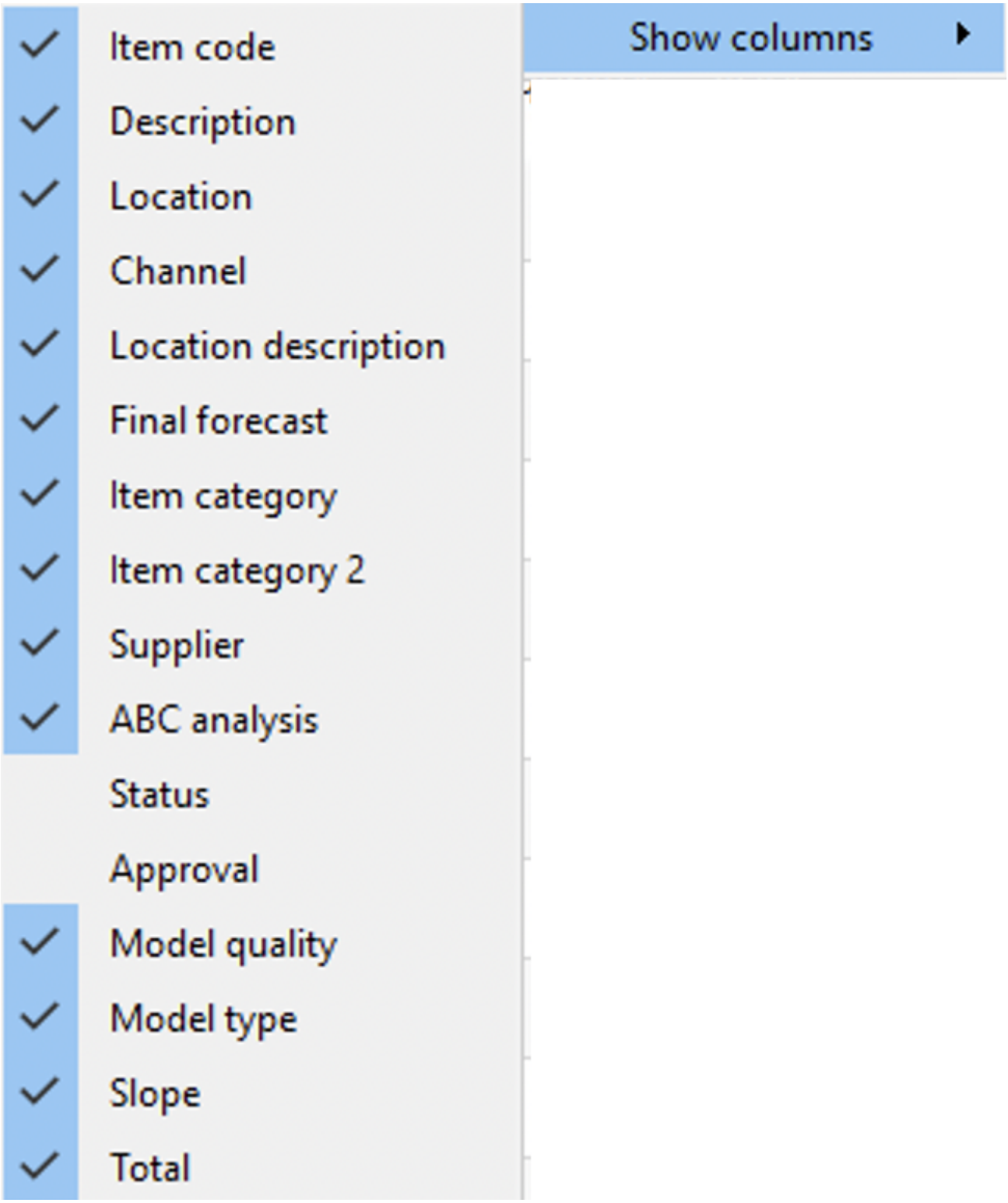
1. Export the report to Excel by clicking the Export Report button on the Reports toolbar. Streamline will automatically create an Excel file containing the report and open it.



1. Make the overrides and save the changes.
2. Import the report back into Streamline by clicking the Import Changes button.



Show columns button opens a check-box menu where each item represents a column of the report header section that can be shown/hidden by toggling it (see figure below). As we said, this shows/hides columns for all of your custom reports in the **Reports tab**.



Below, we list all of the report types and give a description for each of them.

Report type	Description
Projections reports	
Demand forecast	Shows the statistical forecasts, including your manual forecast overrides.
Forecast overrides	Indicate only your forecast overrides. It is useful when you need to export those to Excel.
Forecast performance	Shows the measurement of forecast accuracy.
Confidence limits	Displays upper and lower levels of confidence limits for the SKUs.

Report type	Description
Planned vs. Actual sales	Shows the measure of forecast performance based on the comparison between planned and actual sales.
Ordering plan	This report displays the ordering plan for your inventory in quantity or value
Projected revenue	This report indicates expected revenues based on the current/future adjusted selling prices
Projected sales price	This report shows future selling prices based on the current prices or their manual overrides. In the case of seasonal price forecasting, it shows the generated forecasts.
Projected inventory	This report shows expected inventory levels calculated based on the ordering plan. Those can be represented in quantity or value.
Projected write-offs	This report indicates expected write-off amount/value based on the imported batches' expiration dates
Projected stockouts	This report shows the expected stockout amounts for each period in the future
Expected to receive	Shows the items amounts expected to be received
Expected to ship	Shows the items amounts expected to be shipped
Historical reports	
Historical revenue	Shows the revenue obtained during each period in the past based on the item price or transaction revenue
Historical stock on hand	Displays on-hand at the end of each period in the past. It includes the current on-hand as well.
Historical stockout days	Show the number of days you had run out of stock for each period. The current period is also included in this report.
Historical turnover	Indicates the turnover of every planning item for each period in the past.
Current state reports	
KPIs	Show essential indicators of the current project performance, including inventory turnover, turn-earn index, gross margin, and others

Table

Each report contains a table. The table is divided into two sections, a header section and a data section (see figure below).

Header section

Data section

	Approval state	Industry	Group	Item code	Description	Supplier	Model type	Model quality	ABC analysis	Final forecast				
										Dec 2018	Jan 2019	Feb 2019	Mar 2019	Apr 2019
1	Undecided	Pharmacies	Pharmacies	05-T48	Cold & Flu Tablets [season...	1012	Linear trend	96.1%	B 2.13%	427	428	429	430	431
2	Undecided	Consumer goo...	Furniture	1866-MB	Desk [stockout days]	3850	Seasonal & trend	91.4%	A 6.66%	39	29	34	71	51
3	Undecided	Food/Beverages	Alcoholic Beve...	002661-1	Dark Beer can 473 ml [stoc...	3948	Seasonal & trend	71.3%	C 0.267%	152	88	100	97	109
4	Undecided	Fashion	Clothing Sum...	004652 Blue	Swimwear [seasonal model]	4008	Seasonal & trend	92%	B 2.04%	94	86	103	134	176
5	Undecided	Fashion	Clothing Sum...	004662 Blue	Swimwear #2 new[new pr...	4008	Seasonal & trend	28%	C 0.313%	19	17	21	27	35
6	Undecided	Fashion	Clothing Wint...	016542 Yellow	Winter Coat [excessive inv...	4008	Seasonal & trend	92.8%	A 23.1%	541	329	263	275	217
7	Undecided	Fashion	Clothing Wint...	016543 Purple	Winter Coat #2[new prod...	4008	Seasonal & trend	17.7%	B 5.23%	325	197	158	165	130
8	Undecided	Consumer goo...	Electronics	45645-RP	Radio player Silver [interm...	3850	Intermittent	88.2%	C 0.0748%	0	0	0	0	0
9	Undecided	Consumer goo...	Electronics	46689-PC	Computer [seasonal mod...	3850	Seasonal & trend	96.7%	A 12.2%	57	34	34	35	33
10	Undecided	Food/Beverages	Alcoholic Beve...	50046	Brut Cava 750ml [seasonal...	3948	Seasonal & trend	97.5%	C 0.475%	96	61	61	66	67
11	Undecided	Food/Beverages	Chocolate	56213	Truffles 30 g [seasonal mo...	5080	Seasonal & trend	86.8%	C 0.0546%	44	27	28	16	12

The **header section** is not changed depending on the report type selected. It provides characteristics and descriptive information about planning items that can be used to filter a particular set of items.

The **data section** displays the report content.

The table below describes the columns of the header section.

Column	Description
Approval status	Indicates the forecast approval status for each planning item
Status	Indicates the status of an item
Item code	The code for the item
Location	(Optional) The name/code of the warehouse/store where the item code is stocked
Channel	(Optional) The channel, the item code is sold through
DC	(Optional) The name of the distribution center that supplies the **Item code** to the **Location**
<Item category>	(Optional) The category, the item code belongs to. It is imported from the data source. The name of the imported item category is shown in the column header.
<Location category>	(Optional) The category, the location belongs to. It is imported from the data source. The name of the imported location category is shown in the column header.
<Info field>	(Optional) A custom item characteristic imported through the item info field from the data source. The name of the characteristic is displayed in the header of the column.
Description	(Optional) The description for the item code
Location description	(Optional) The description for the location
Supplier	(Optional) The supplier for the planning item
Model type	Indicates the model type used to generate forecasts for the planning item
Model quality	Shows the model accuracy calculated using the formula: $Quality = \frac{1}{n} \times \sum_{i=1}^{n} \left(1 - \left| \frac{M_i - A_i}{A_i} \right| \right)$, where: • M_i and A_i, i = 1, ..., n are the model response and the corresponding actual sales for i-th period; • n is the number of priods or time points in the learning set; these are shown in blue in the Plot. If a period doesn't have sales (A_i = 0), the term in the sum is substituted by zero.
Slope	Shows the slope of the trend represented in percentages.
ABC analysis	Shows the result of ABC analysis

The report table is sortable by any column and even by an ordered set of columns.

Next: Historical Reports

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