

5.12. Creating Custom Reports

The multiple reports that Streamline offers are designed to provide a comprehensive view of the various facets of your inventory planning and demand forecasting. They can also be created with the help of custom filters. The reports display information from both historical and future perspectives.

A unique feature of Streamline is interactive [inventory reports](#). It means that a report is recalculated on-the-fly as you change its [input parameters](#).

Streamline generates reports on:

- **Inventory planning** tab
- **Interstore optimization** tab
- **Reports** tab.

The **Reports tab** allows the generation of a broad spectrum of reports, including projected, historical, and current state reports on demand and inventory planning activities. Each of the tabs allows for creating custom reports. The Inventory Planning and Inter-store optimization tabs generate custom reports using filters. The Reports tab, besides filters, provides additional tools for customization like:

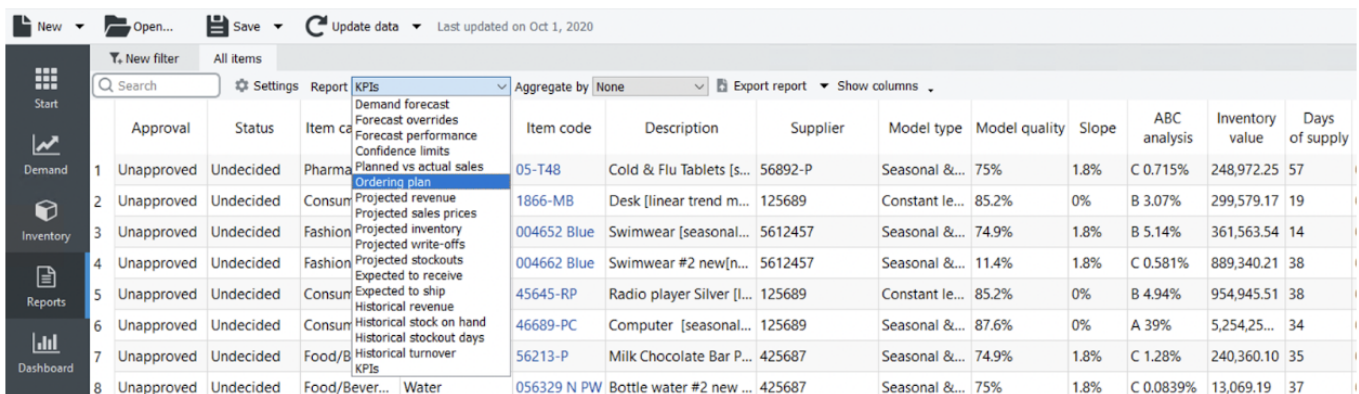
- aggregation the report by its rows and columns;
- overriding the report; and
- changing the report representation units.

You can also combine the capabilities, for example, override the Final forecast report at an aggregated level and generate an ordering plan based on those overrides.

Below, we show how to create custom reports with examples.

Custom Reports in 'Reports' Tab

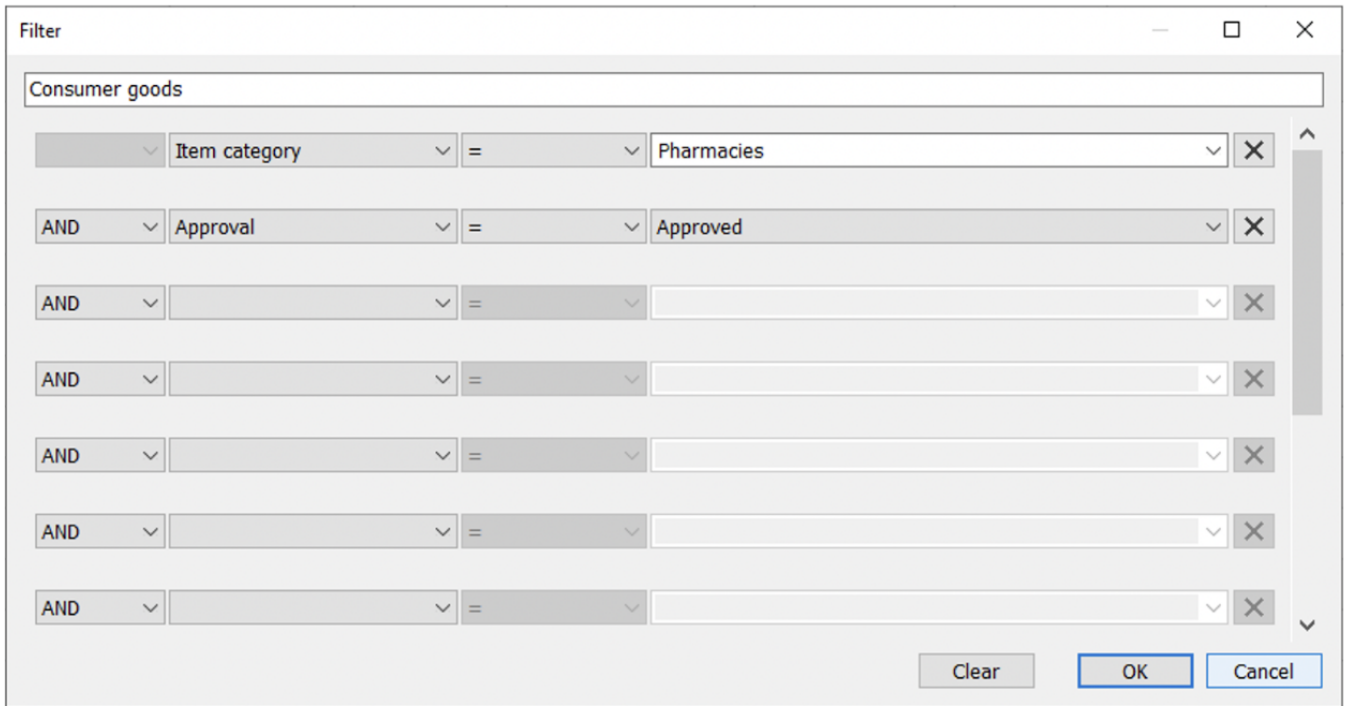
We use the Inventory Planning by Month built-in example to demonstrate the capabilities. To create a custom report in the Reports tab: 1. Select the required report type from the Report drop-down (see figure below). For our example, we choose the **Ordering plan** option.



Approval	Status	Item code	Description	Supplier	Model type	Model quality	Slope	ABC analysis	Inventory value	Days of supply
1 Unapproved	Undecided	Pharma	Cold & Flu Tablets [s...	56892-P	Seasonal &...	75%	1.8%	C 0.715%	248,972.25	57
2 Unapproved	Undecided	Consum	Desk [linear trend m...	125689	Constant le...	85.2%	0%	B 3.07%	299,579.17	19
3 Unapproved	Undecided	Fashion	Swimwear [seasonal...	5612457	Seasonal &...	74.9%	1.8%	B 5.14%	361,563.54	14
4 Unapproved	Undecided	Fashion	Swimwear #2 new[n...	5612457	Seasonal &...	11.4%	1.8%	C 0.581%	889,340.21	38
5 Unapproved	Undecided	Consum	Radio player Silver [I...	125689	Constant le...	85.2%	0%	B 4.94%	954,945.51	38
6 Unapproved	Undecided	Consum	Computer [seasonal...	125689	Seasonal &...	87.6%	0%	A 39%	5,254,25...	34
7 Unapproved	Undecided	Food/B	Milk Chocolate Bar P...	425687	Seasonal &...	74.9%	1.8%	C 1.28%	240,360.10	35
8 Unapproved	Undecided	Food/Bever...	Bottle water #2 new ...	425687	Seasonal &...	75%	1.8%	C 0.0839%	13,069.19	37

2. Optionally, you can filter the selected report by any columns of the [header section](#). Filters allow you

to show items satisfying given criteria. In our example, we would like to see items of the **Consumer goods** industry with forecast status **Approved**. To do this, we click the **New filter** button and configure the **filter dialog** as shown in the figure below.



The result is shown in the figure below.

Approval	Status	Item category	Item code	Description	Supplier	Model type	Model quality	Slope	ABC analysis	Inventory value	Days of supply
1 Unapproved	Undecided	Pharma	05-T48	Cold & Flu Tablets [s...	56892-P	Seasonal &...	75%	1.8%	C 0.715%	248,972.25	57
2 Unapproved	Undecided	Consum	1866-MB	Desk [linear trend m...	125689	Constant le...	85.2%	0%	B 3.07%	299,579.17	19
3 Unapproved	Undecided	Fashion	004652 Blue	Swimwear [seasonal...	5612457	Seasonal &...	74.9%	1.8%	B 5.14%	361,563.54	14
4 Unapproved	Undecided	Fashion	004662 Blue	Swimwear #2 new[n...	5612457	Seasonal &...	11.4%	1.8%	C 0.581%	889,340.21	38
5 Unapproved	Undecided	Consum	45645-RP	Radio player Silver [I...	125689	Constant le...	85.2%	0%	B 4.94%	954,945.51	38
6 Unapproved	Undecided	Consum	46689-PC	Computer [seasonal...	125689	Seasonal &...	87.6%	0%	A 39%	5,254.25...	34
7 Unapproved	Undecided	Food/B	56213-P	Milk Chocolate Bar P...	425687	Seasonal &...	74.9%	1.8%	C 1.28%	240,360.10	35
8 Unapproved	Undecided	Food/Bever...	056329 N PW	Bottle water #2 new ...	425687	Seasonal &...	75%	1.8%	C 0.0839%	13,069.19	37

Approval	Item category	Item category 2	Item code	Description	Supplier	Model type	Model quality	Slope	ABC analysis	Jan 2020	Feb 2020	Mar 2020	Apr 2020
1 Approved	Pharmacies	Pharmacies	05-T48	Cold & Flu Tablets [s...	56892-P	Seasonal &...	75%	1.8%	C 0.715%	6,310	8,670	14,380	13,870
2 Approved	Pharmacies	Pharmacies	VB2166 150	Vital Blue 150 g Vita...	56892-P	Seasonal &...	75%	1.8%	C 1.04%	21,110	8,670	14,370	13,880
3 Approved	Pharmacies	Pharmacies	VR2156 200	Vital Reds 200g Vita...	56892-P	Constant le...	85.2%	0%	C 0.577%	6,160	4,600	5,220	4,810

3. Let's aggregate the report by the Item Category column and change the representation unit to

Value (see figure below).

		Ordering plan, value													
Approval	Item category	Item code	Model quality	Slope	Jan 2020	Feb 2020	Mar 2020	Apr 2020	May 2020	Jun 2020	Jul 2020	Aug 2020	Sep 2020	Oct 2020	Nov 2021
1 Approved	Pharmacies	3 items	78.4%	1.2%	511,336.19	312,848.60	474,661.29	454,022.39	568,790.79	640,452.99	498,778.29	488,945.19	312,361.80	230,178.50	212,462.5

4. Optionally, you can hide/show particular columns in your reports using the **Show columns** button. Let's hide the Approval state and Model quality columns (see figures below).

		Ordering plan, value													
Item category	Item code	Slope	Jan 2020	Feb 2020	Mar 2020	Apr 2020	May 2020	Jun 2020	Jul 2020	Aug 2020	Sep 2020	Oct 2020	Nov 2020	Dec 2020	Total
1 Pharmacies	3 items	1.2%	511,336.19	312,848.60	474,661.29	454,022.39	568,790.79	640,452.99	498,778.29	488,945.19	312,361.80	230,178.50	212,462.50	407,610.39	5,112,44...

5. Finally, let's export the report to Excel by clicking the Export report button (see figure below).

Ordering plan value									
Group	Item code	Description	Supplier	Dec 2018	Jan 2019	Feb 2019	Mar 2019		
1 Building materials and	3 items			1044.450007	103.949996		69.29999804		
2 Sporting goods	B05465-R	Basketball 29.5 (size 7)	3850	838.200016	2179.320042		2179.320042		
3 Electronics	45645-RP	Radio player Silver [inte	3850	965.7999878					
4 Furniture	3 items			29222.71069	109806.403		46801.7012		

Custom Inventory Reports

As we mentioned, Streamline displays inventory reports on the **Inventory planning, and Interstore optimization** tabs. This section shows how to create a custom inventory report using the Material Requirements Planning example in the **Inventory planning** tab. Customized reports on the other tabs are made in the same way.

Let's create two reports:

- *Material requirements plan* – shows a purchase plan for **materials** and **intermediate** items according to the demand forecast of **finished** items and replenishment parameters.
- *Manufacturing plan* – shows an ordering plan for *finished* and *intermediate* items that should be manufactured to cover the demand forecast.

To accomplish this, we will use filters.

To create a report representing *Material requirements plan*, we click the **New filter** button. This opens the **Filter** dialog.

The result is shown in the figure below.

Item category	Item category 2	Item code	Description	Item type	On hand	Available max build	Days of supply	To ship	To receive	Lead time, days	Order cycle, months	Min lot	Rounding	Service level, %	Safety stock
1 Materials	Food/Beverages	1866-MB-R...	Raisins white [materi...	Material	628	—	31	0	0	30	1			98%	0
2 Materials	Food/Beverages	1866-MB-R...	Raisins black [materi...	Material	150	—	30	0	0	30	1			98%	0
3 Materials	Food/Beverages	500461	Milk Chocolate bar 2...	Material	8,340	—	5	2,000	0	30	1			98%	1,966
4 Materials	Food/Beverages	1866-MB-RO	Rolled oats [material]	Material	1,175	—	32	0	0	30	1			98%	0
5 Materials	Food/Beverages	1866-MB-WB	Wheat bran [material]	Material	2,750	—	42	0	0	30	1			98%	0
6 Materials	Food/Beverages	1866-MB-OB	Oat bran [material]	Material	3,320	—	59	0	0	30	1			98%	0
7 Materials	Food/Beverages	1866-MB-CW	Chopped walnuts [m...	Material	293	—	32	0	0	30	1			98%	0

To create a report showing *Manufacturing plan*, we click the **New filter** button again and configure the **Filter** dialog as shown in the figure below.

Filter

Manufacturing plan

Item type = Finished

AND Order type = Manufacture

AND

AND

AND

AND

AND

Clear OK Cancel

The result is shown in the figure below.

Item category	Item category 2	Item code	Description	Item type	On hand	Available max build	Days of supply	To ship	To receive	Lead time, days	Order cycle, months	Min lot	Rounding	Service level, %	Safety stock
1 Finished	Food/Beverages	56213-P	Milk Chocolate Bar P...	Finished	4,525	634	26	0	2,400	5	—			98%	1,989

Next: ABC Analysis

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