Fabric Plan

E2 **Forecasting and Writeback** 30 min

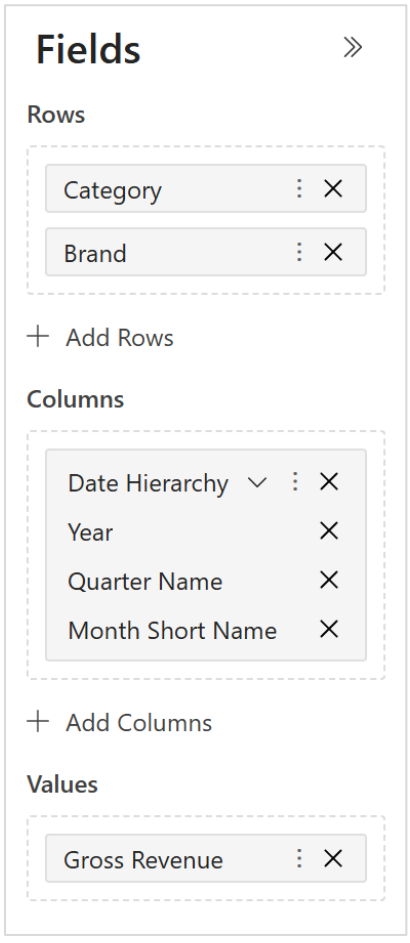
Build a blank 2026 forecast measure, populate it using Statistical Forecasting from 24 months of historical actuals, bring in January 2026 actuals as they land, close the period and extend the horizon, reforecast the newly opened January 2027 period, then commit the forecast to the Fabric SQL database.

Part 1 **Create the Rolling Forecast**

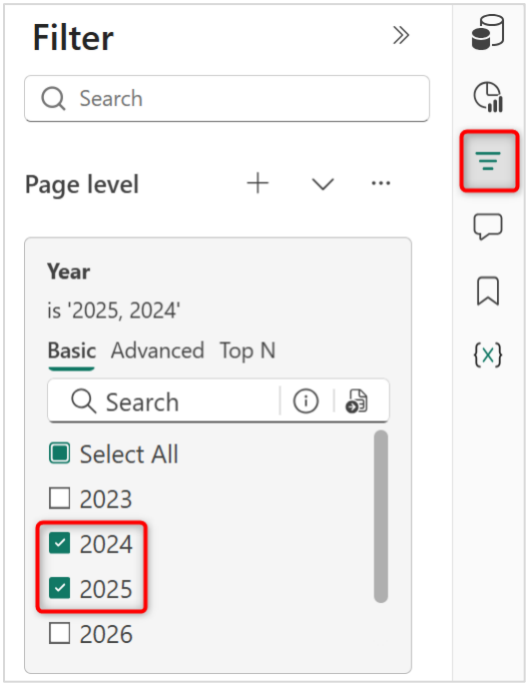
Set up a Rolling Forecast sheet anchored on 2024 and 2025 actuals, then create a blank Forecast 2026 measure ready to be populated.

1. Set up the Forecast sheet

i. In the Acme_Beverages_Plan app created in E1, create a new Planning sheet named Forecast. Configure rows as Category → Brand, columns as the date hierarchy (Year → Quarter Name → Month Short Name), and Values as Gross Revenue.

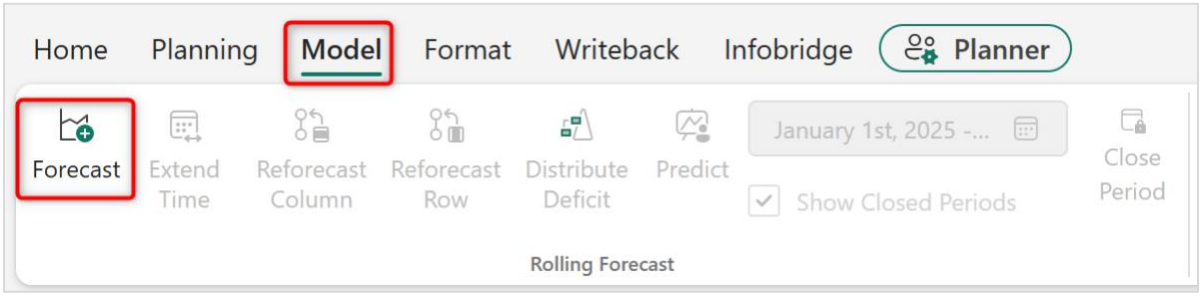


ii. Apply a 2024 and 2025 year filter in the side bar. Enable Column Sub Total on the left.

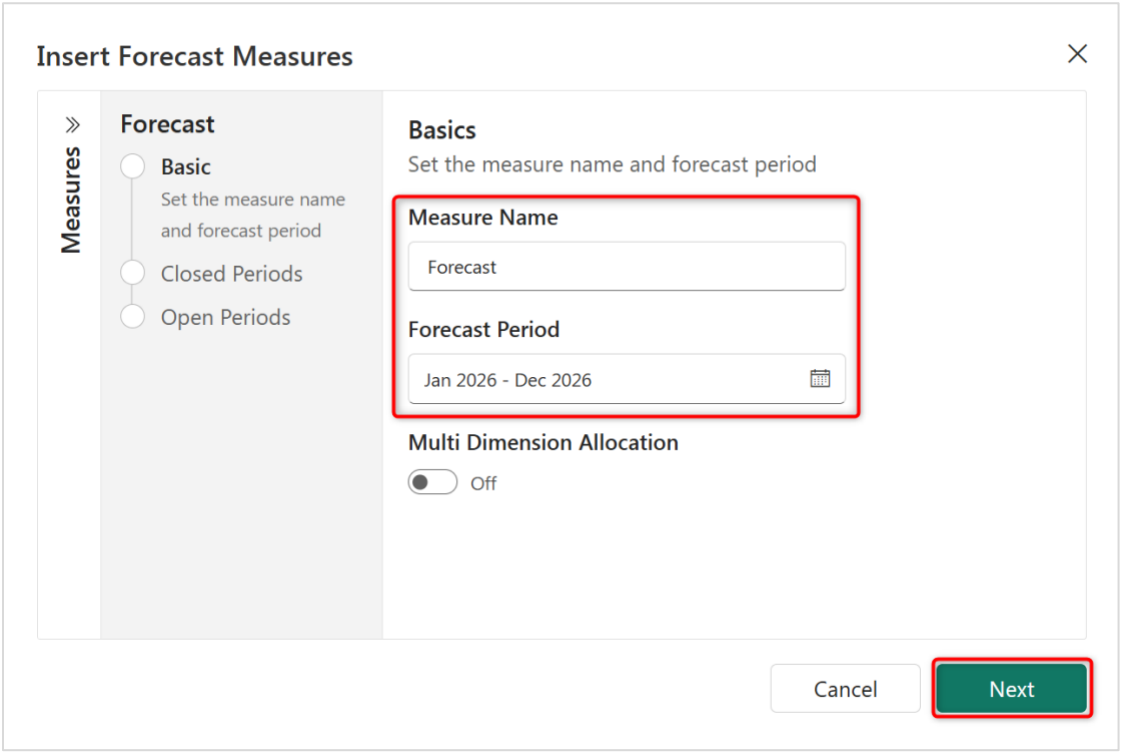


2. Create the Forecast measure

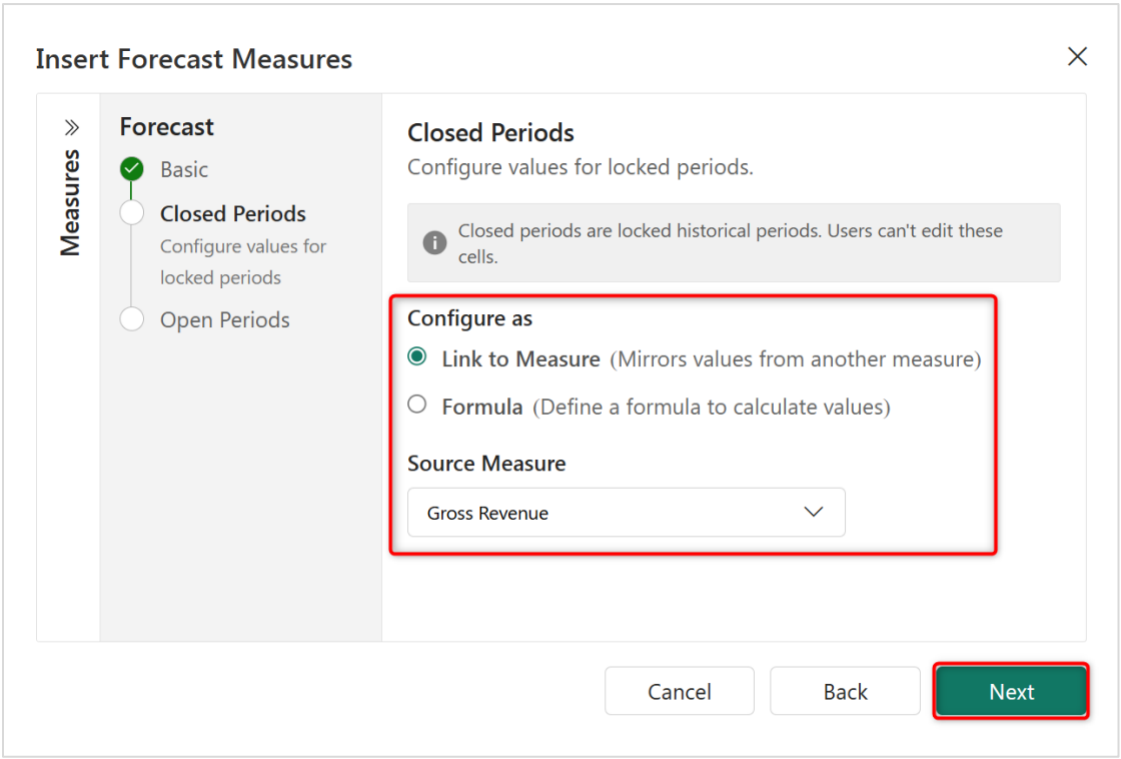
i. Navigate to the Model ribbon and select Forecast.



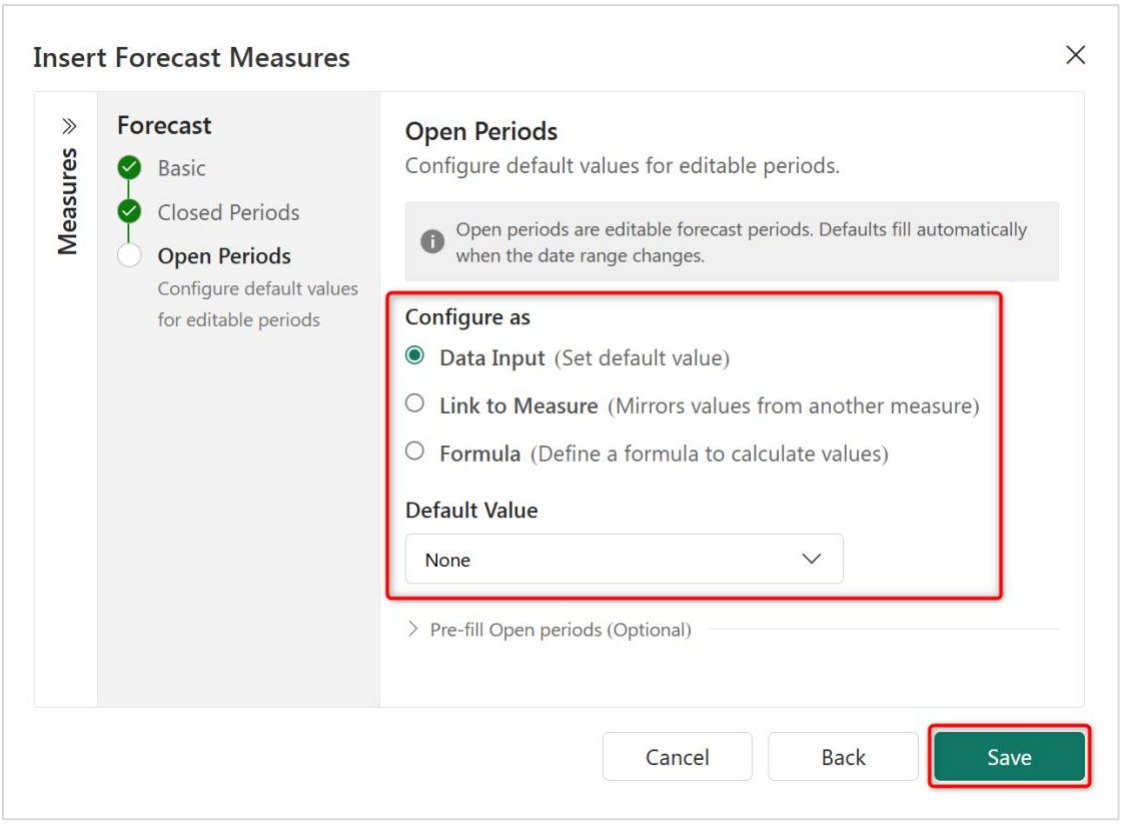
ii. The Insert Forecast Measure dialog box opens. Enter Measure Name as Forecast and select Forecast Period as Jan 2026 to Dec 2026. Click Next.



iii. In the Closed Periods screen, select Link to Measure and Source Measure as Gross Revenue. Click Next.



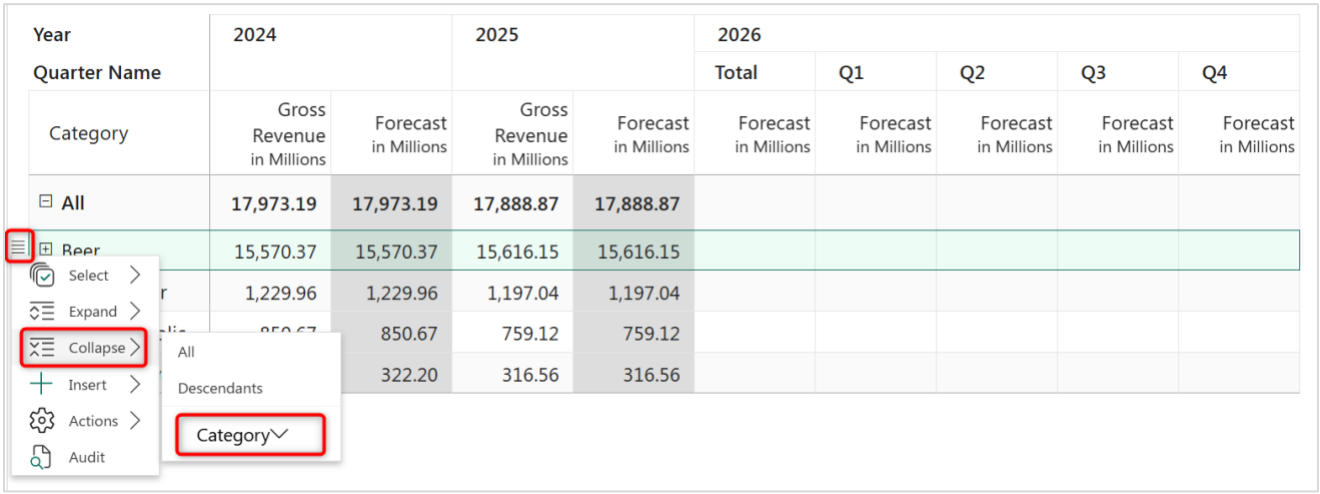
iv. In the Open Periods screen, select Data Input and Default Value as None. Click Save.



v. Observe that the forecasts for 2024 and 2025 are greyed out, indicating that the years are closed. Expand the 2026-year header to see the open forecast periods, which are empty and ready for forecasting.

Year	> 2024		> 2025		2026				
Quarter Name					Total	> Q1	> Q2	> Q3	> Q4
Category	Gross Revenue in Millions	Forecast in Millions	Gross Revenue in Millions	Forecast in Millions	Forecast in Millions	Forecast in Millions	Forecast in Millions	Forecast in Millions	Forecast in Millions
⊟ All	17,973.19	17,973.19	17,888.87	17,888.87					
⊟ Beer	15,570.37	15,570.37	15,616.15	15,616.15					
Artisan Ale	1,482.98	1,482.98	1,480.96	1,480.96					
Cosmic Craft ...	2.37	2.37	12.93	12.93					
Eclipse Light	975.37	975.37	990.26	990.26					
Old Mill Stout	1,957.34	1,957.34	1,958.70	1,958.70					
Riverbend IPA	2,595.00	2,595.00	2,618.68	2,618.68					
Summit Lager	8,557.31	8,557.31	8,554.62	8,554.62					

vi. Collapse the row headers to the Category level so it is easy to examine the category level values.

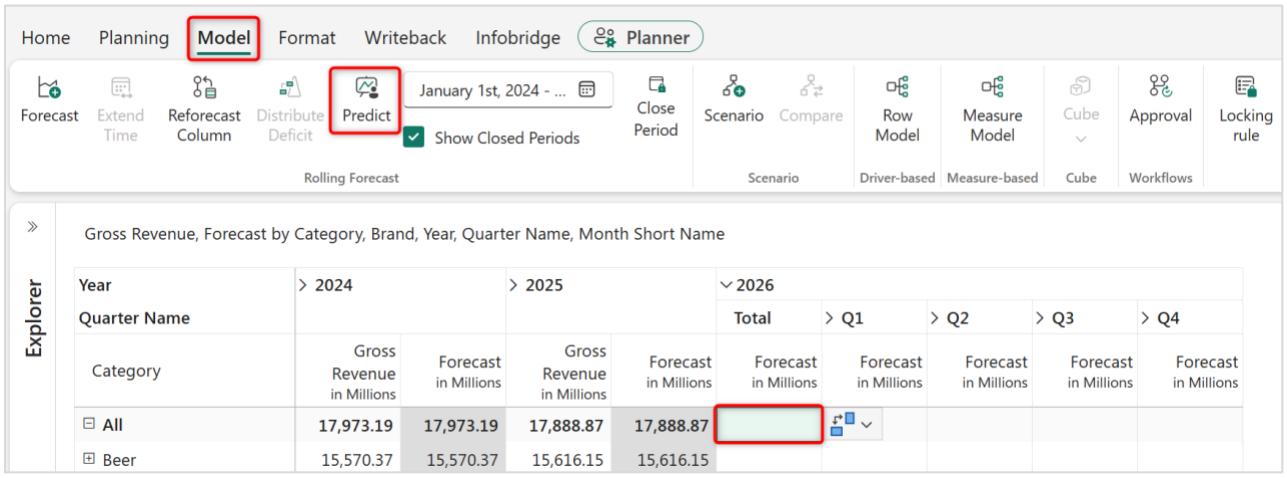


Part 2 Generate Statistical Forecast

With 24 months of historical actuals in place, run Statistical Forecast across the full Jan–Dec 2026 horizon. The model uses Trend Decomposition with MSTL to detect seasonal patterns across annual and quarterly cycles and generates a complete year of forecasted values in one pass.

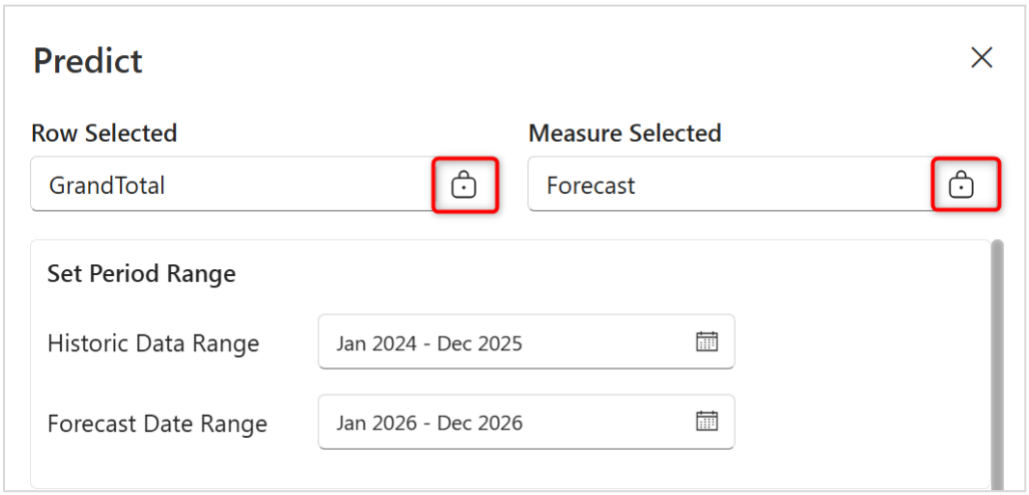
3. Run the forecast

i. Click the cell at the intersection of the All row and the Forecast sub total column for 2026. In the Model ribbon, click Predict.



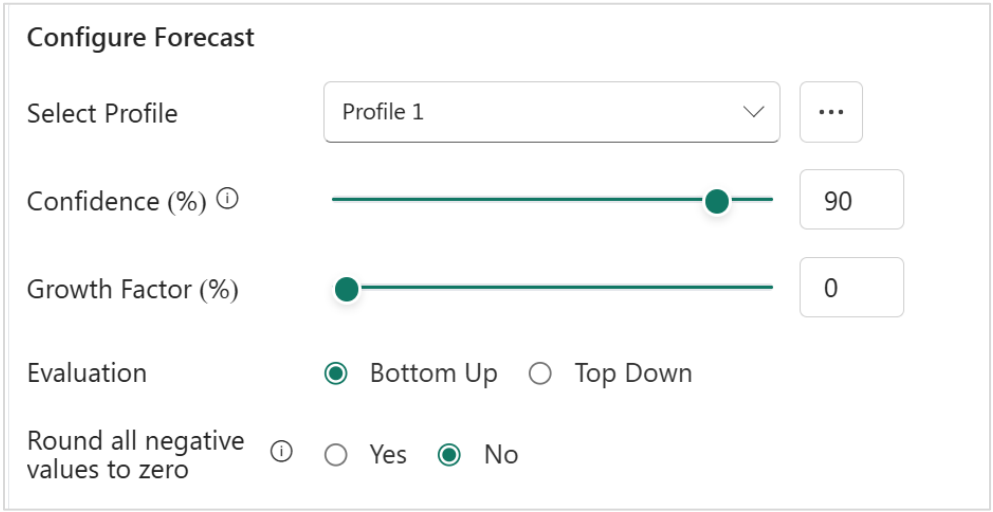
ii. The Predict dialog opens. Use the lock icon to freeze the row and measure selection after confirming - Select Row = Grand Total and Select Measure = Forecast. Confirm the following default selections:

- Historic Data Range: Jan 2024 – Dec 2025
- Forecast Date Range: Jan 2026 – Dec 2026

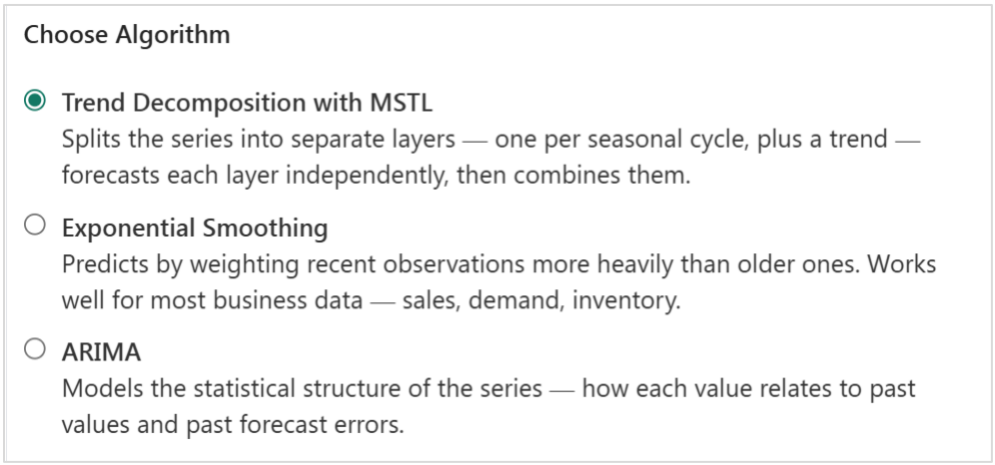


iii. Configure the forecast as follows:

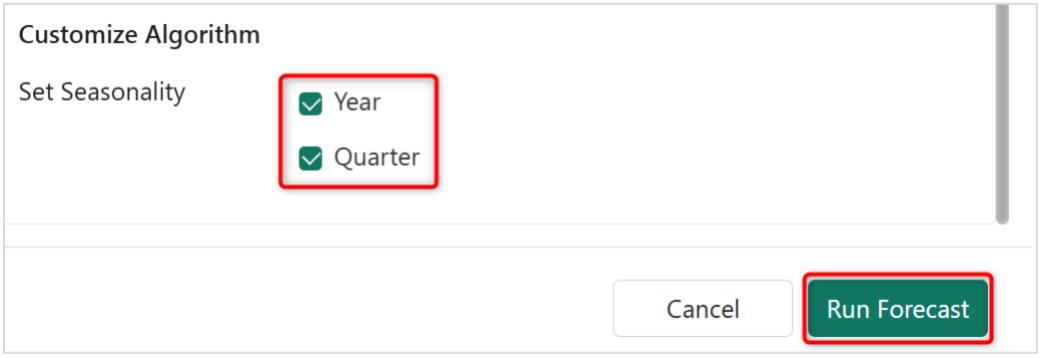
- Confidence: 90% (Indicates the level of certainty that the actual value will fall within the predicted range)
- Growth Factor: 4%
- Evaluation: Bottom Up
- Round all negative values to zero: No



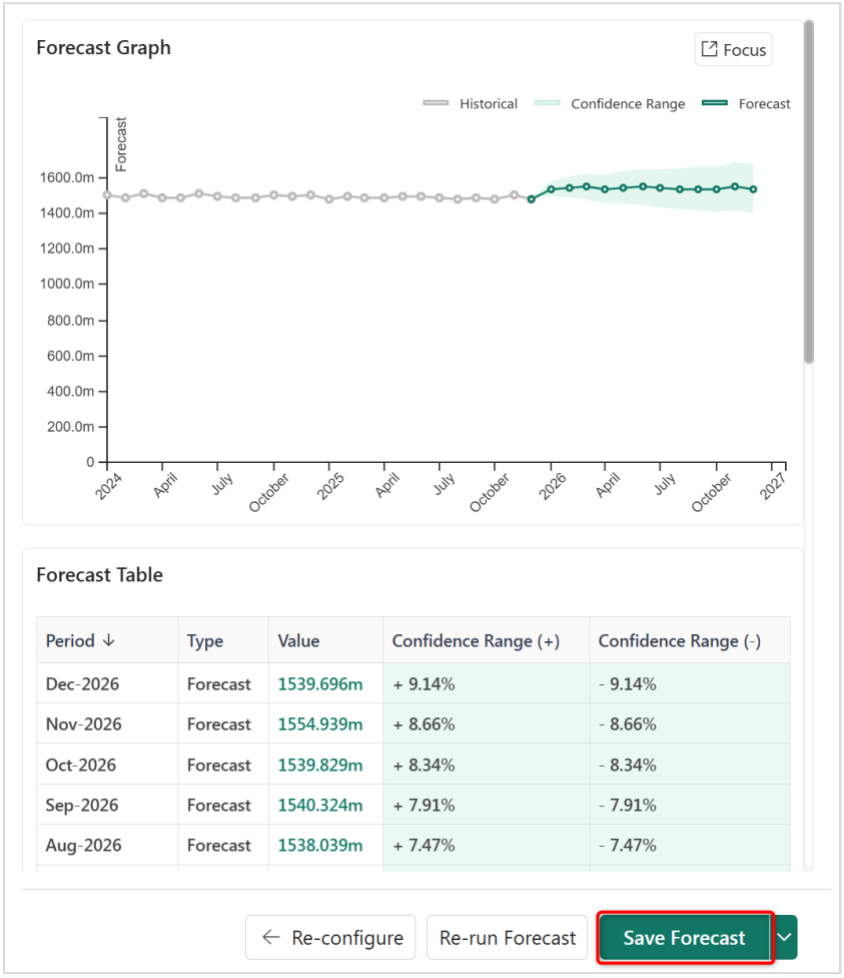
iv. Under Choose Algorithm, confirm Trend Decomposition with MSTL is selected. It is the best fit for beverage sales data where patterns repeat at both the annual and quarterly levels.



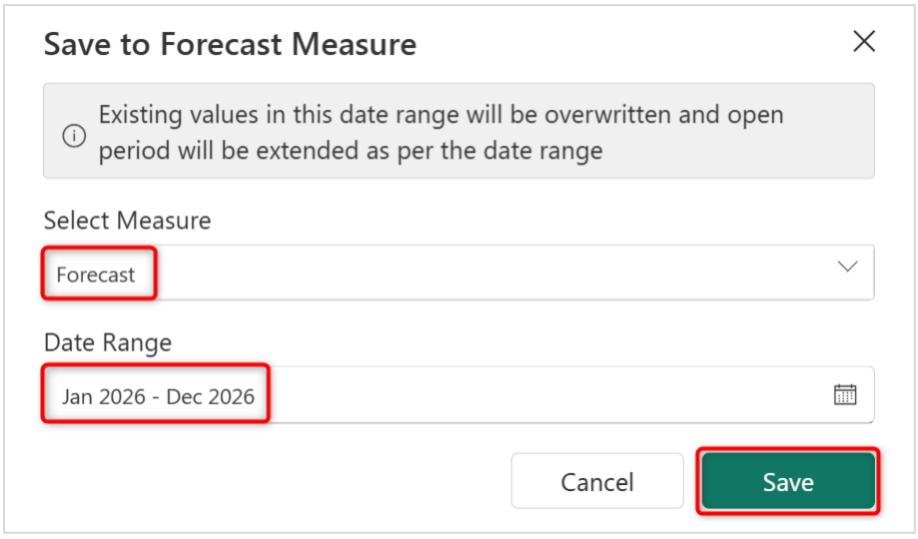
v. Under Customize Algorithm, tick both Year and Quarter under Set Seasonality. This tells the model to detect and account for patterns at both cycle levels simultaneously. Click Run Forecast.



vi. The forecast preview appears. Historical data is shown in grey, while predicted values are shown in green, with the confidence range shown as green shading in the background. Below the graph, you can also see the values in a tabular format. Click Save Forecast.



vii. In the Save to forecast measure dialog, ensure Select measure is Forecast and Date range is Jan 2026 – Dec 2026. Click Save.



viii. The statistical forecast has been created with values calculated at the most granular level of the row and column hierarchies, then aggregated up to higher levels.

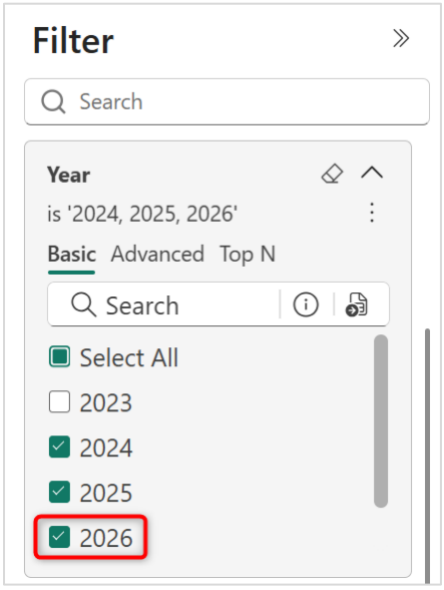
Year	2024		2025		2026				
Quarter Name					Total	Q1	Q2	Q3	Q4
Category	Gross Revenue in Millions	Forecast in Millions	Gross Revenue in Millions	Forecast in Millions	Forecast in Millions	Forecast in Millions	Forecast in Millions	Forecast in Millions	Forecast in Millions
All	17,973.19	17,973.19	17,888.87	17,888.87	18,527.47	9.62	4,633.69	4,619.71	4,634.46
Beer	15,570.37	15,570.37	15,616.15	15,616.15	16,169.20	4,060.01	4,050.90	4,024.61	4,033.68
Hard Seltzer	1,229.96	1,229.96	1,197.04	1,197.04	1,273.59	311.52	317.96	323.21	320.90
Non-Alcoholic Bevera...	850.67	850.67	759.12	759.12	732.13	182.06	179.30	182.06	188.71
Ready to Drink Cocktails	322.20	322.20	316.56	316.56	352.56	86.03	85.52	89.83	91.18

Part 3 Close the Period, Extend, and Reforecast

As January 2026 actuals land, close the period to lock them in and automatically extend the forecast horizon by a month. With the newly opened January 2027 period now in view, reforecast it — seeding from January 2026 actuals and applying a growth assumption.

4. Reveal January 2026 Actuals

i. In the sidebar, click Filter → edit the existing year filter → add 2026 alongside 2024 and 2025.

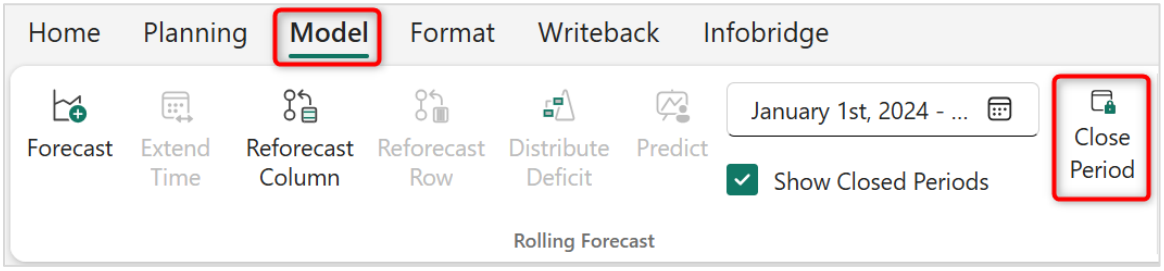


ii. Expand the column headers and compare the two January 2026 values side by side: Forecast: $1,540M — the value generated in Part 2 — against Gross Revenue: $1,552M — the actual January figure. Once step 5 is complete, January 2026's Forecast value will be replaced automatically with the Gross Revenue actuals.

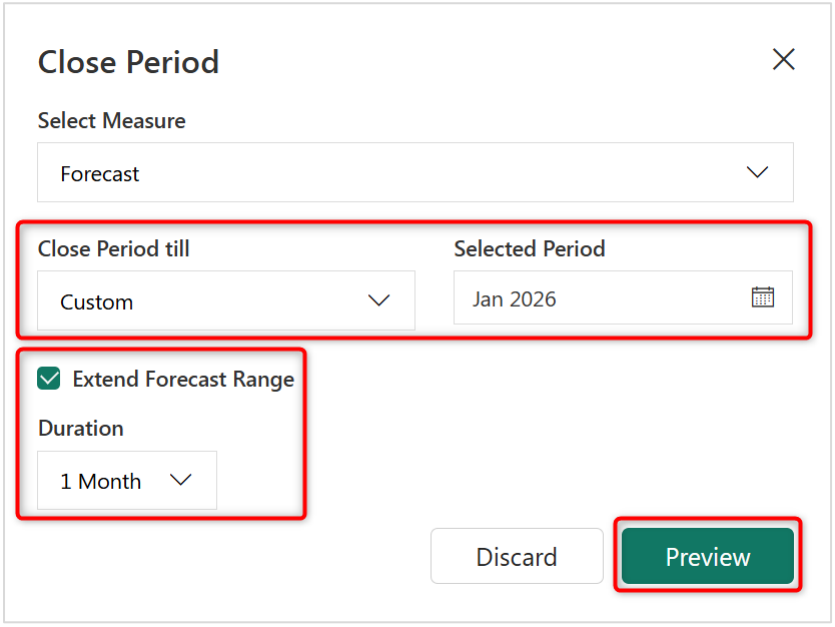
Year	2024		2025		2026					
Quarter Name					Total		Q1			
Month Short Name							Total		Jan	
Category	Gross Revenue in Millions	Forecast in Millions	Gross Revenue in Millions	Forecast in Millions	Gross Revenue in Millions	Forecast in Millions	Gross Revenue in Millions	Forecast in Millions	Gross Revenue in Millions	Forecast in Millions
All	17,973.19	17,973.19	17,888.87	17,888.87	1,552.99	18,527.47	1,552.99	4,639.62	1,552.99	1,540.71
Beer	15,570.37	15,570.37	15,616.15	15,616.15	1,355.82	16,169.20	1,355.82	4,060.01	1,355.82	1,347.88
Hard Seltzer	1,229.96	1,229.96	1,197.04	1,197.04	103.62	1,273.59	103.62	311.52	103.62	103.04
Non-Alcoholic Bevera...	850.67	850.67	759.12	759.12	65.92	732.13	65.92	182.06	65.92	61.60
Ready to Drink Cocktails	322.20	322.20	316.56	316.56	27.63	352.56	27.63	86.03	27.63	28.19

5. Close January and Extend the Forecast

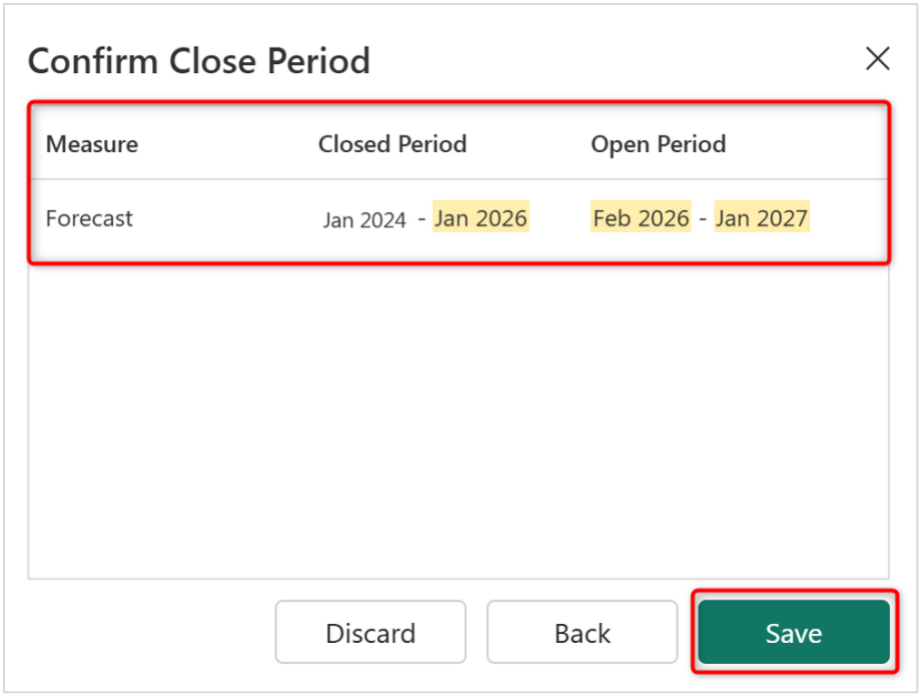
i. Navigate to the Model ribbon and click on Close Period.



ii. Close period dialog opens. Click on the Close period till dropdown. Scroll down and click on Custom. Ensure the selected period is Jan 2026. Tick Extend Forecast Range and ensure Duration = 1 Month — this maintains a continuous 12-month forward window as January closes, Jan 2027 is added to the horizon. Click Preview.



iii. Confirm Close Period dialog opens. Verify: Closed Period = Jan 2024 - Jan 2026, Open Period starts Feb 2026, Forecast horizon extends to Jan 2027. Click Save.



iv. Close period is updated. Observe that Jan 2026 is populated with Actual Gross Revenue and greyed out, indicating a closed period.

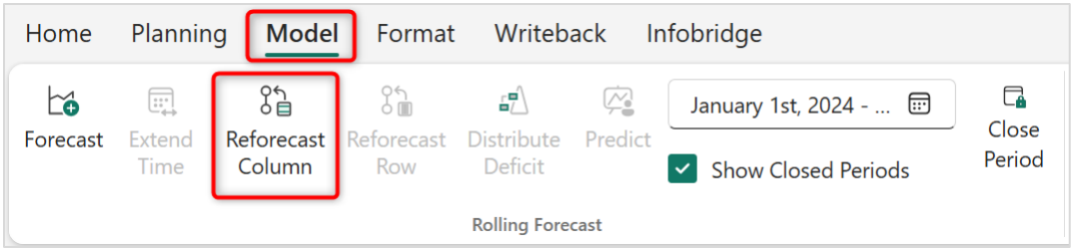
Year	2024		2025		2026					
Quarter Name					Total		Q1			
Month Short Name							Total		Jan	
Category	Gross Revenue in Millions	Forecast in Millions	Gross Revenue in Millions	Forecast in Millions	Gross Revenue in Millions	Forecast in Millions	Gross Revenue in Millions	Forecast in Millions	Gross Revenue in Millions	Forecast in Millions
All	17,973.19	17,973.19	17,888.87	17,888.87	1,552.99	18,539.75	1,552.99	4,651.89	1,552.99	1,552.99
Beer	15,570.37	15,570.37	15,616.15	15,616.15	1,355.82	16,177.14	1,355.82	4,067.95	1,355.82	1,355.82
Hard Seltzer	1,229.96	1,229.96	1,197.04	1,197.04	103.62	1,274.16	103.62	312.09	103.62	103.62
Non-Alcoholic Bevera...	850.67	850.67	759.12	759.12	65.92	736.45	65.92	186.39	65.92	65.92
Ready to Drink Cocktails	322.20	322.20	316.56	316.56	27.63	352.00	27.63	85.47	27.63	27.63

v. Also note that the forecast horizon automatically extends to Jan 2027.

Year	2024		2025		2026		2027		
Quarter Name							Total	Q1	
Month Short Name								Total	Jan
Category	Gross Revenue in Millions	Forecast in Millions	Gross Revenue in Millions	Forecast in Millions	Gross Revenue in Millions	Forecast in Millions	Forecast in Millions	Forecast in Millions	Forecast in Millions
All	17,973.19	17,973.19	17,888.87	17,888.87	1,552.99	18,539.75			
Beer	15,570.37	15,570.37	15,616.15	15,616.15	1,355.82	16,177.14			
Hard Seltzer	1,229.96	1,229.96	1,197.04	1,197.04	103.62	1,274.16			
Non-Alcoholic Bevera...	850.67	850.67	759.12	759.12	65.92	736.45			
Ready to Drink Cocktails	322.20	322.20	316.56	316.56	27.63	352.00			

6. Seed Jan 2027 with Jan 2026 actuals

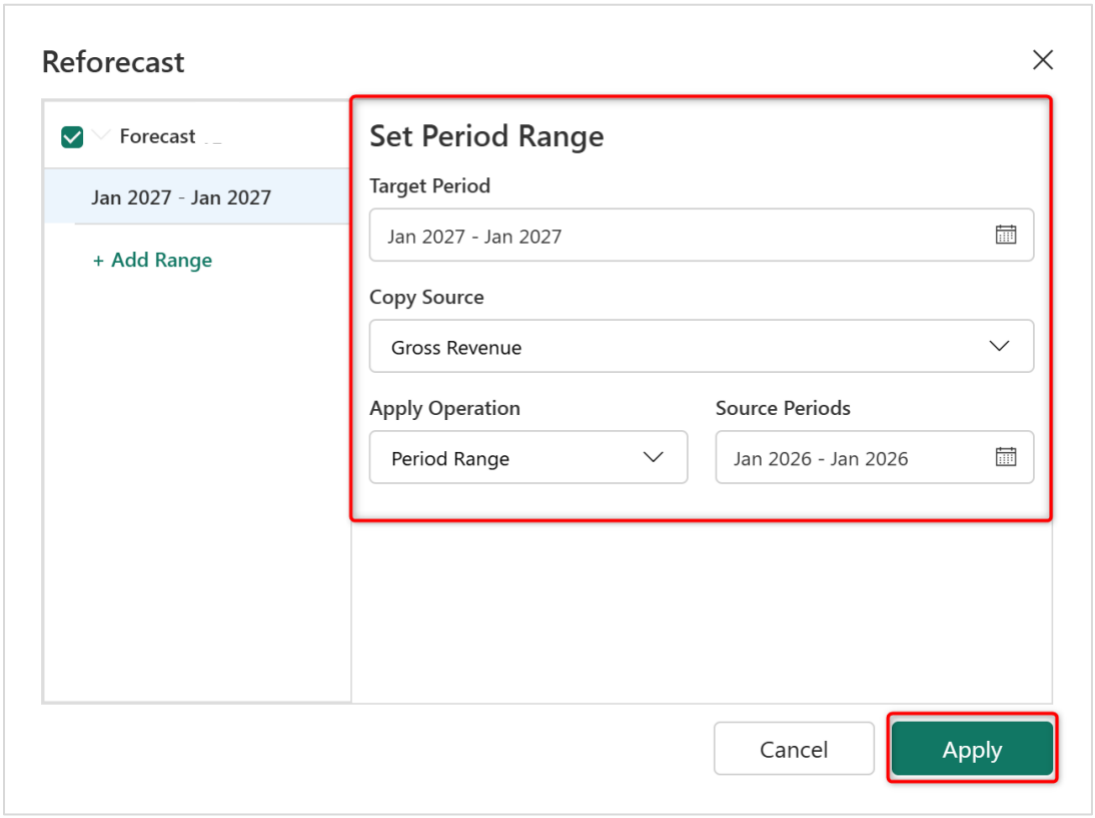
i. Navigate to the Model ribbon and click on Reforecast Column.



ii. Reforecast dialog opens. Configure as follows:

- Target period - Jan 2027 – Jan 2027
- Copy Source - Gross Revenue

- Apply Operation - Period Range
- Source Periods – Jan 2026 – Jan 2026
- Click Apply.

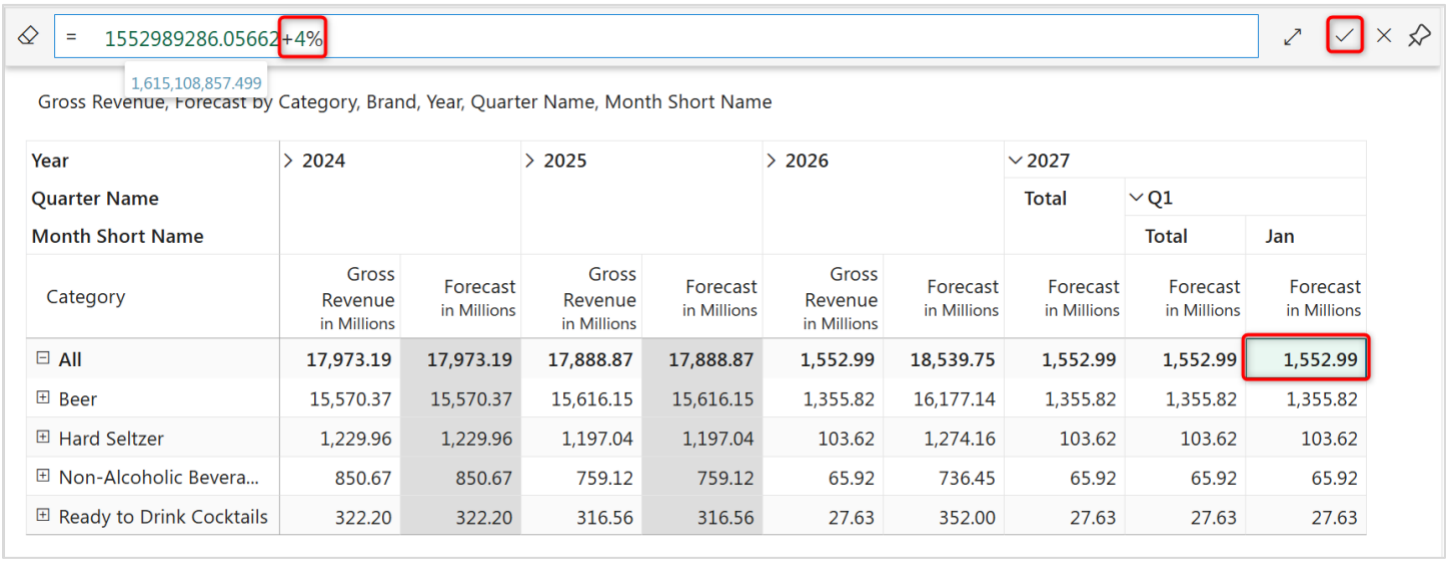


iii. January 2027 is now seeded from January 2026 actuals ($1,552M), giving the team a realistic baseline for the extended forecast horizon.

Year	2024		2025		2026		2027		
Quarter Name							Total	Q1	
Month Short Name								Total	Jan
Category	Gross Revenue in Millions	Forecast in Millions	Gross Revenue in Millions	Forecast in Millions	Gross Revenue in Millions	Forecast in Millions	Forecast in Millions	Forecast in Millions	Forecast in Millions
All	17,973.19	17,973.19	17,888.87	17,888.87	1,552.99	18,539.75	1,552.99	1,552.99	1,552.99
Beer	15,570.37	15,570.37	15,616.15	15,616.15	1,355.82	16,177.14	1,355.82	1,355.82	1,355.82
Hard Seltzer	1,229.96	1,229.96	1,197.04	1,197.04	103.62	1,274.16	103.62	103.62	103.62
Non-Alcoholic Bevera...	850.67	850.67	759.12	759.12	65.92	736.45	65.92	65.92	65.92
Ready to Drink Cocktails	322.20	322.20	316.56	316.56	27.63	352.00	27.63	27.63	27.63

7. Apply a growth assumption to Jan 2027

i. Double-click the Jan 2027 Grand total cell, enter +4%, and click the check mark.



Year	2024		2025		2026		2027		
Quarter Name							Total	Q1	
Month Short Name								Total	Jan
Category	Gross Revenue in Millions	Forecast in Millions	Gross Revenue in Millions	Forecast in Millions	Gross Revenue in Millions	Forecast in Millions	Forecast in Millions	Forecast in Millions	Forecast in Millions
All	17,973.19	17,973.19	17,888.87	17,888.87	1,552.99	18,539.75	1,552.99	1,552.99	1,552.99
Beer	15,570.37	15,570.37	15,616.15	15,616.15	1,355.82	16,177.14	1,355.82	1,355.82	1,355.82
Hard Seltzer	1,229.96	1,229.96	1,197.04	1,197.04	103.62	1,274.16	103.62	103.62	103.62
Non-Alcoholic Bevera...	850.67	850.67	759.12	759.12	65.92	736.45	65.92	65.92	65.92
Ready to Drink Cocktails	322.20	322.20	316.56	316.56	27.63	352.00	27.63	27.63	27.63

ii. Confirm January 2027 is now populated at $1,615M.

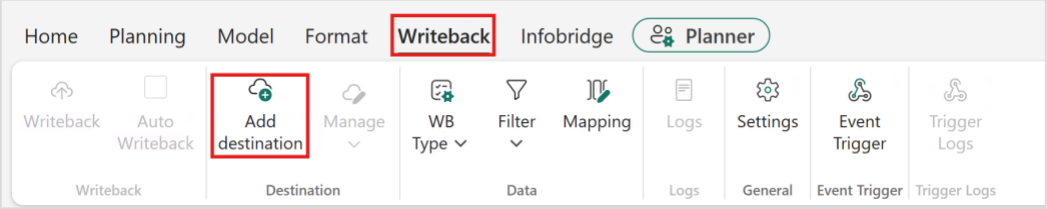
Year	2024		2025		2026		2027		
Quarter Name							Total	Q1	
Month Short Name								Total	Jan
Category	Gross Revenue in Millions	Forecast in Millions	Gross Revenue in Millions	Forecast in Millions	Gross Revenue in Millions	Forecast in Millions	Forecast in Millions	Forecast in Millions	Forecast in Millions
All	17,973.19	17,973.19	17,888.87	17,888.87	1,552.99	18,539.75	1,615.11	1	1,615.11
Beer	15,570.37	15,570.37	15,616.15	15,616.15	1,355.82	16,177.14	1,410.05	1,410.05	1,410.05
Hard Seltzer	1,229.96	1,229.96	1,197.04	1,197.04	103.62	1,274.16	107.76	107.76	107.76
Non-Alcoholic Bevera...	850.67	850.67	759.12	759.12	65.92	736.45	68.56	68.56	68.56
Ready to Drink Cocktails	322.20	322.20	316.56	316.56	27.63	352.00	28.74	28.74	28.74

Part 4 Writeback

With the forecast finalized, commit Forecast to the Fabric SQL database by adding a writeback destination, exploring the writeback settings, running writeback, then verifying the results directly in the database and reviewing the logs.

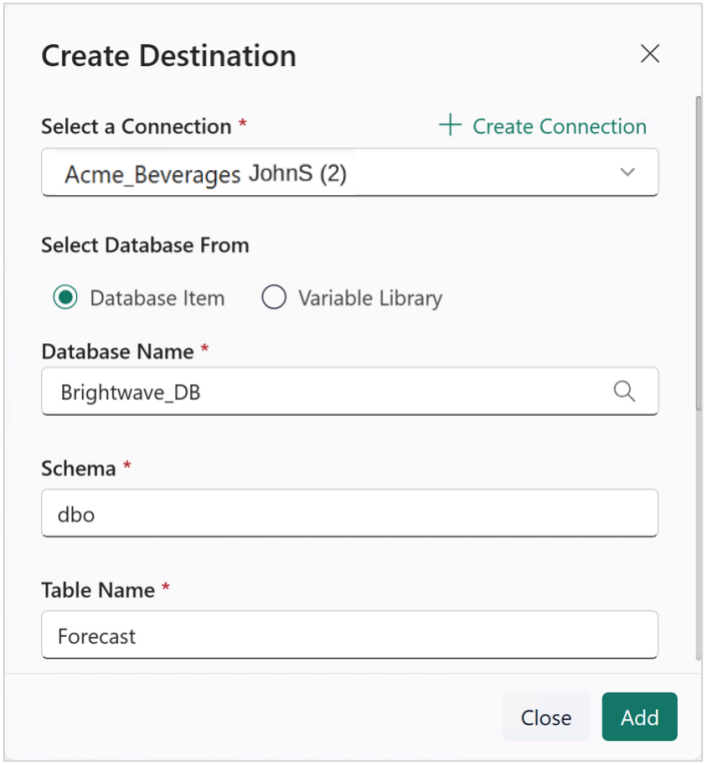
8. Add a writeback destination

i. Go to the Writeback ribbon and click Add destination.



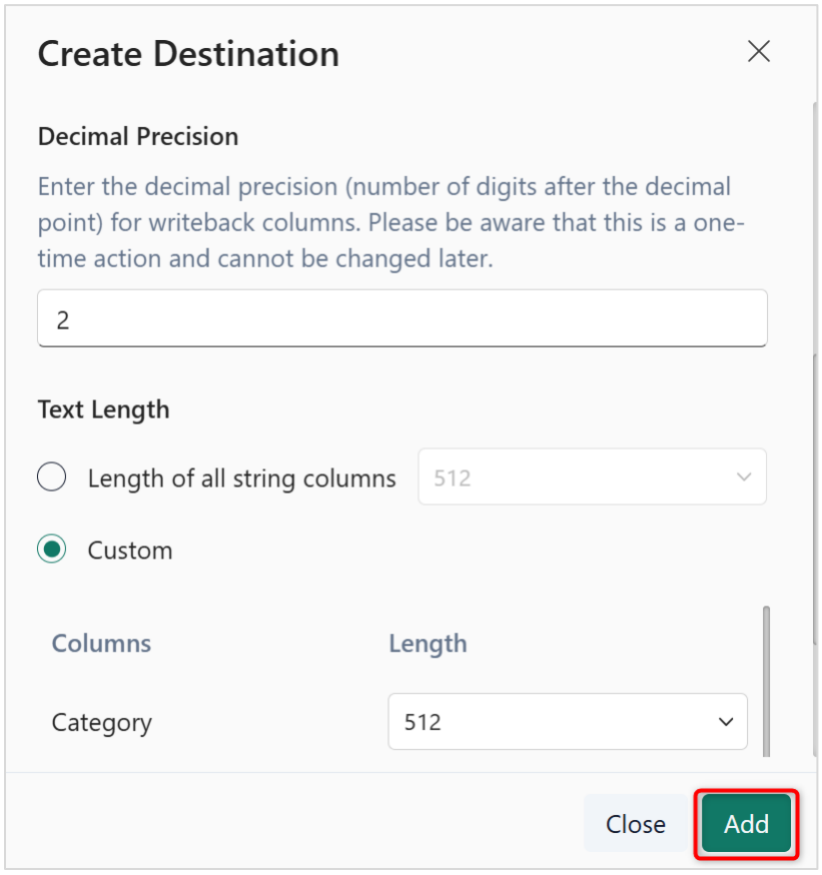
ii. Create destination dialog box opens. Provide the writeback configuration as follows:

- Select connection – Select the DB connection (Created in Exercise 1 Part 1)
- Database name – Select Acme_Beverages (Created in Exercise 1 Part 1)
- Ensure schema is dbo
- Table name – Forecast

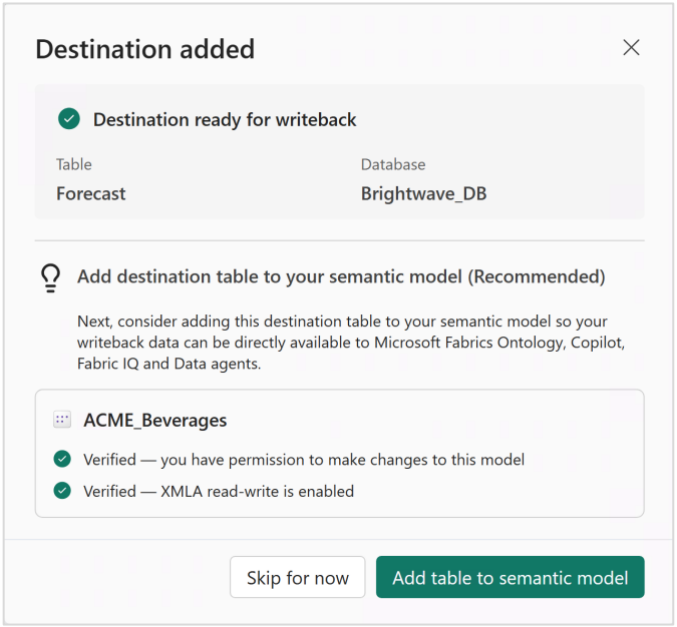


- Decimal Precision – 2
- Text Length – leave it as 512; though it can be customized.

After configuring the settings, click Add.



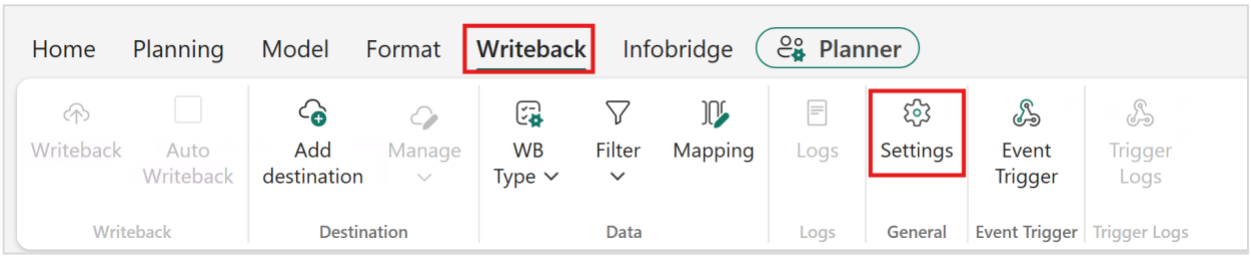
iii. After adding the destination, a pop-up asking to writeback to semantic model appears. Select "skip for now".



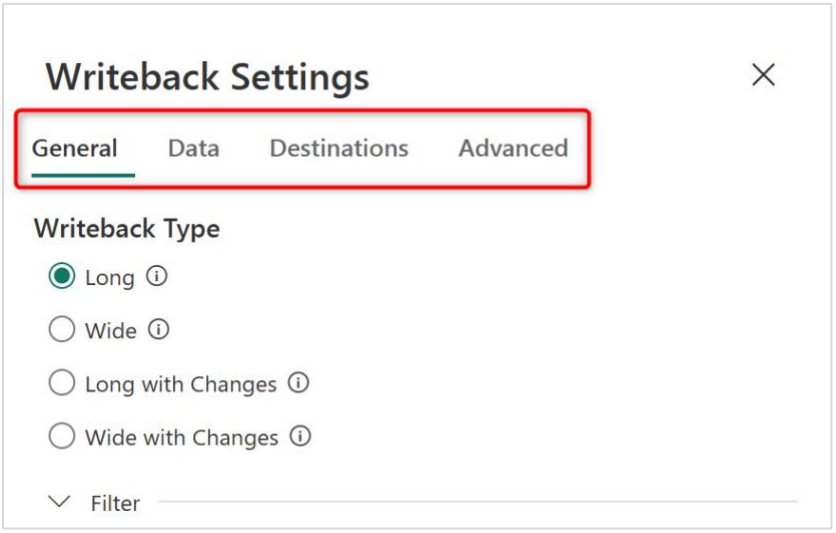
iv. Once the destination has been added successfully, a message is shown.

9. Configure writeback settings

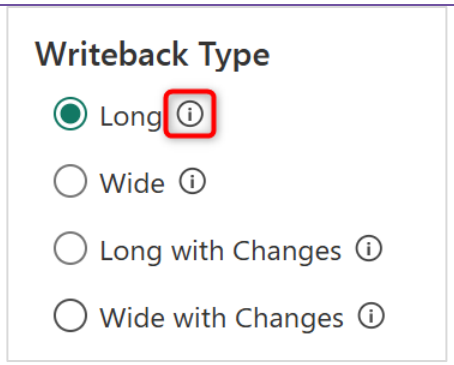
i. In the Writeback ribbon, click Settings.



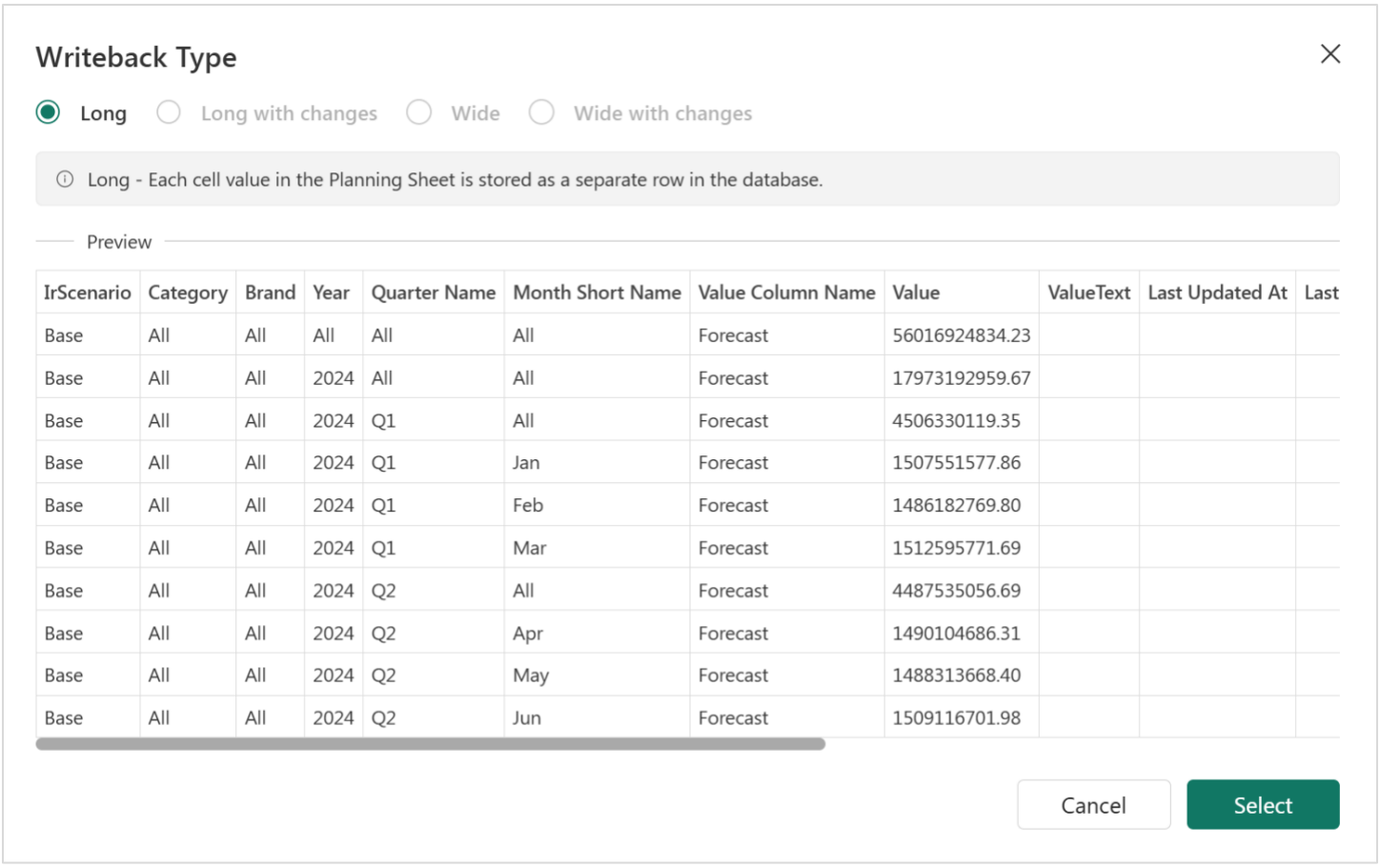
ii. The Settings panel opens with four tabs — General, Data, Destinations, and Advanced.



iii. In the General tab, review the four writeback types by clicking the information icon next to each:

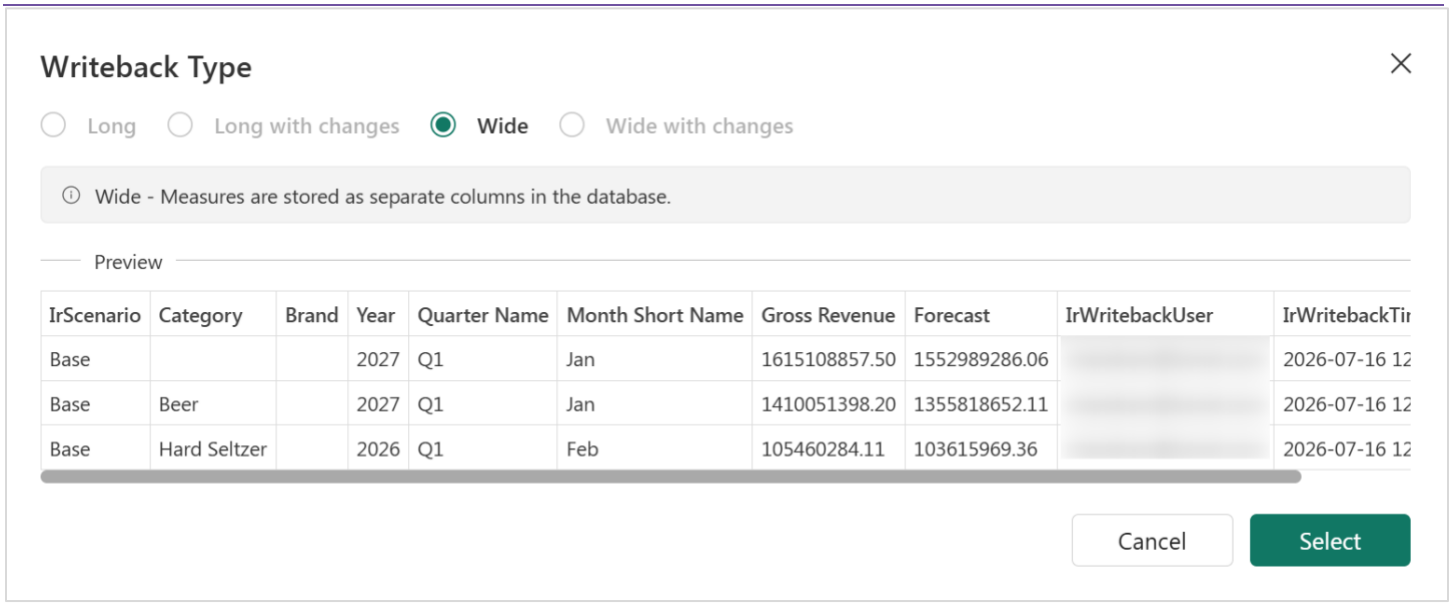


a. Long

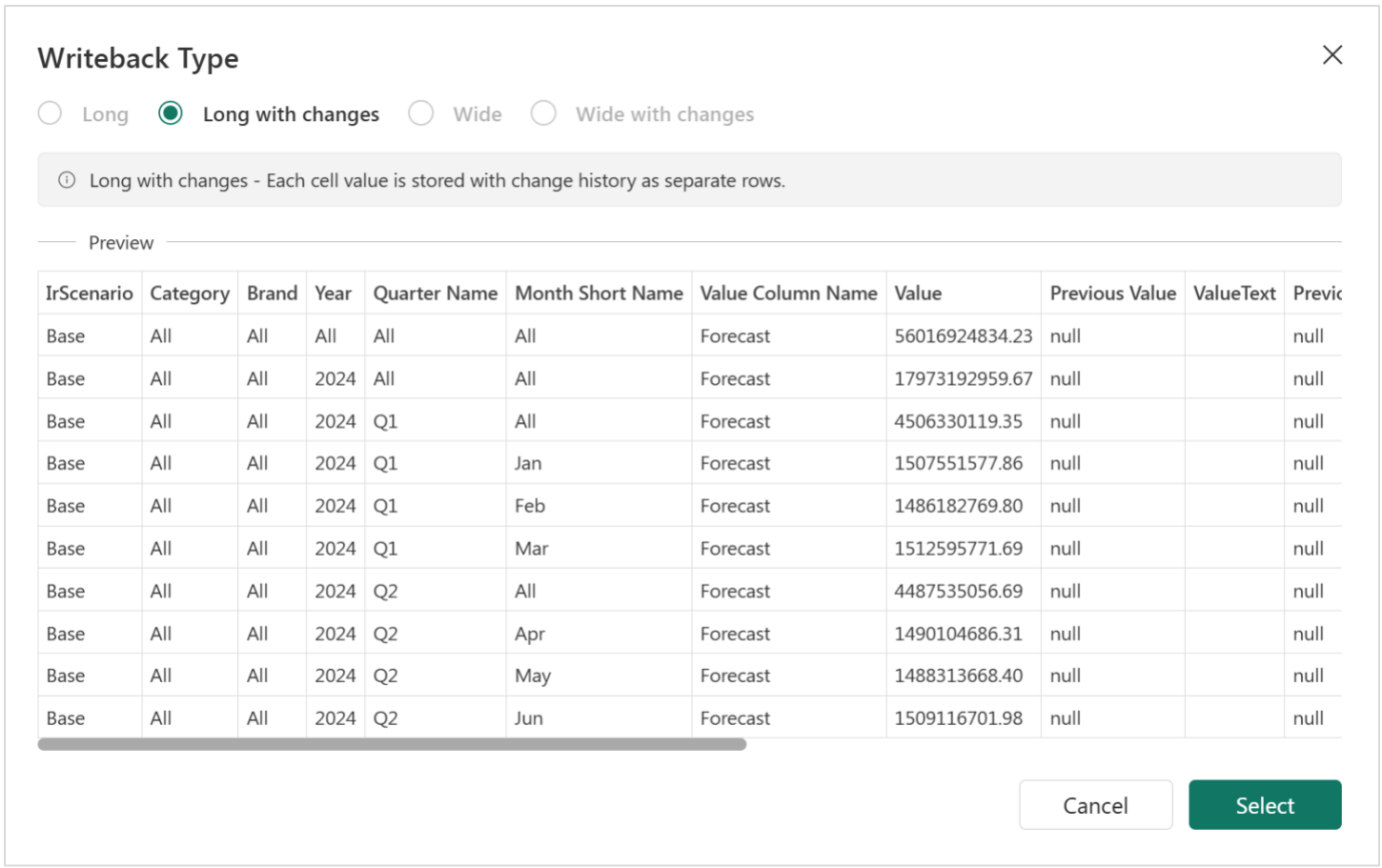


IrScenario	Category	Brand	Year	Quarter Name	Month Short Name	Value Column Name	Value	ValueText	Last Updated At	Last
Base	All	All	All	All	All	Forecast	56016924834.23			
Base	All	All	2024	All	All	Forecast	17973192959.67			
Base	All	All	2024	Q1	All	Forecast	4506330119.35			
Base	All	All	2024	Q1	Jan	Forecast	1507551577.86			
Base	All	All	2024	Q1	Feb	Forecast	1486182769.80			
Base	All	All	2024	Q1	Mar	Forecast	1512595771.69			
Base	All	All	2024	Q2	All	Forecast	4487535056.69			
Base	All	All	2024	Q2	Apr	Forecast	1490104686.31			
Base	All	All	2024	Q2	May	Forecast	1488313668.40			
Base	All	All	2024	Q2	Jun	Forecast	1509116701.98			

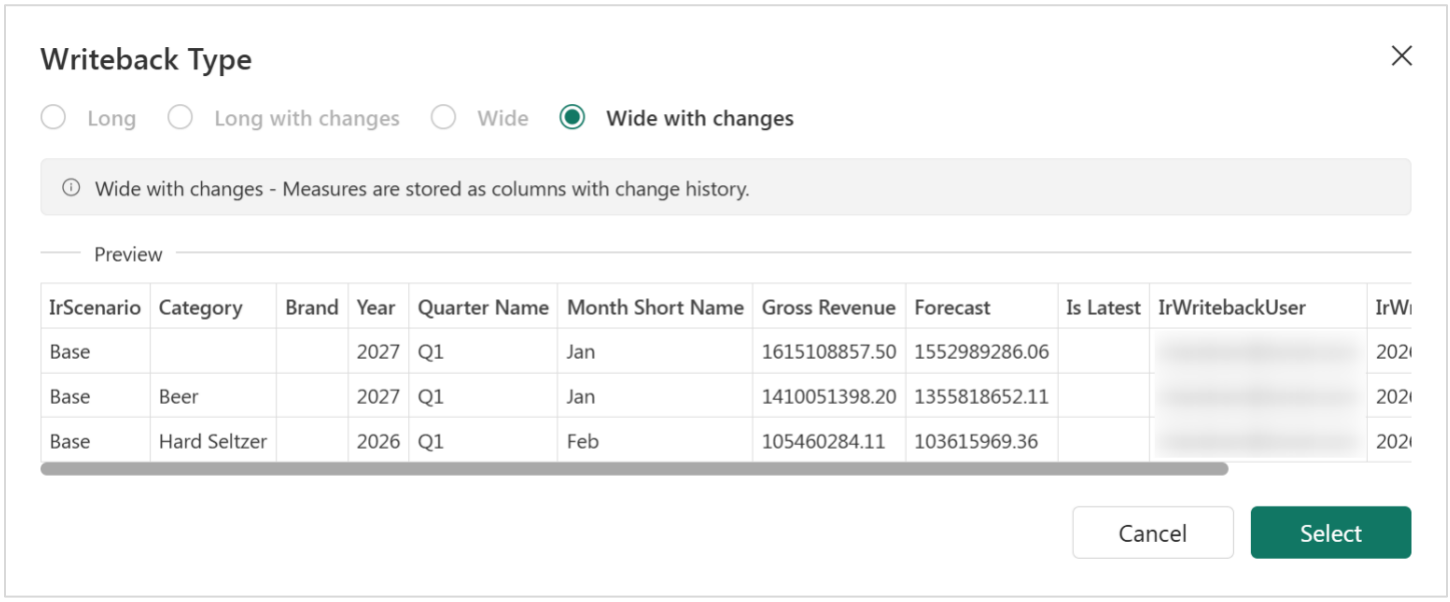
b. Wide



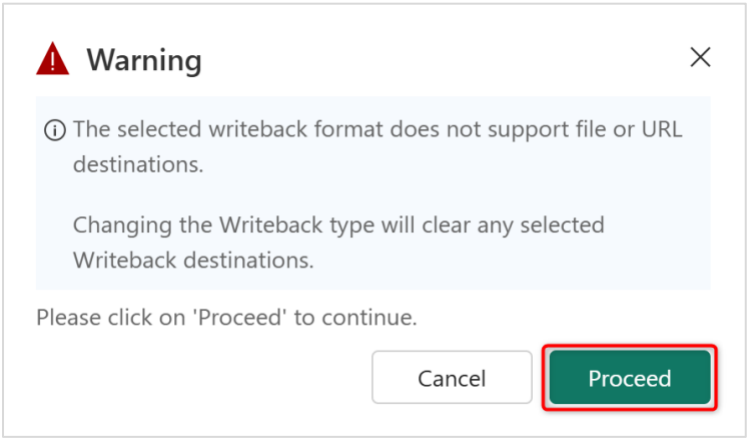
c. Long with Changes



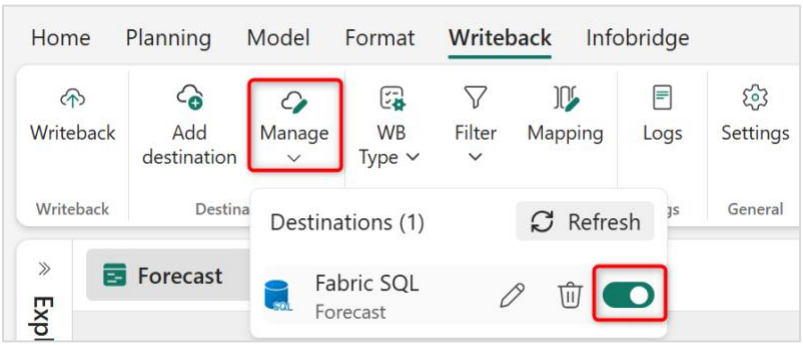
d. Wide with Changes



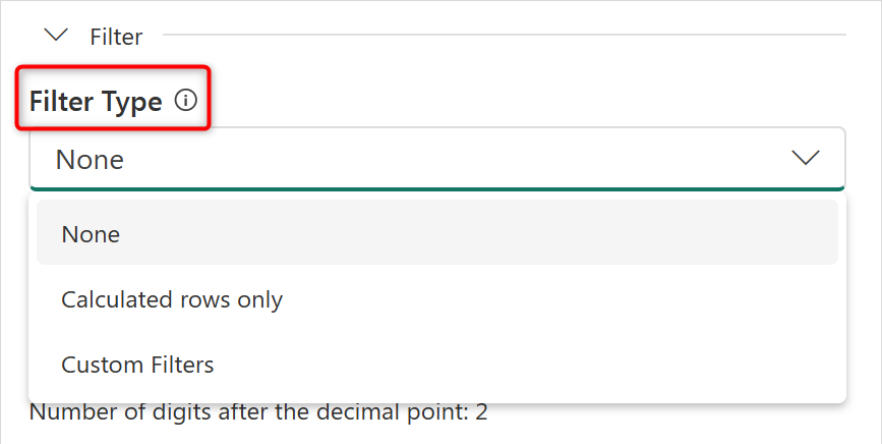
iv. Select Long with Changes. When you change the writeback type, the configured writeback destination will be turned off. A warning message regarding this will pop up. Click Proceed.



v. Use the toggle under Manage to switch on the destination again.



vi. Go back to Settings. The Filter type option controls which data gets written back to the destination. We'll leave it as None.



a. None — writes back the entire scenario without filtering

b. Data with Comments only — writes back only cells that contain comments (Long type only)

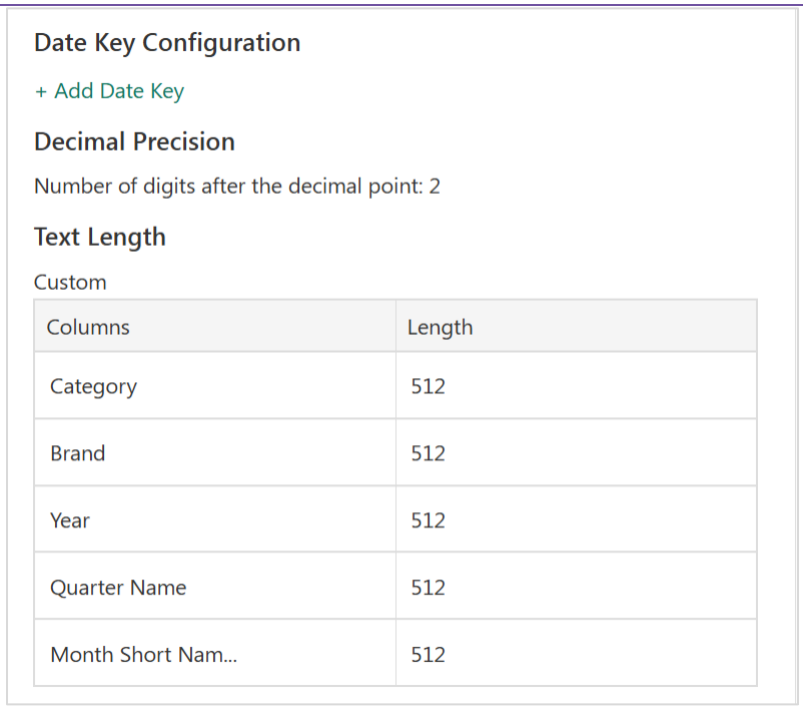
c. Calculated rows only — writes back only calculated rows and any notes added to them

vii. Let's quickly look at the other options available:

a. Date Key configuration lets you add date keys to the writeback table during writeback.

b. Decimal Precision defines the number of digits after the decimal point. This was decided in step 8.ii when adding the destination.

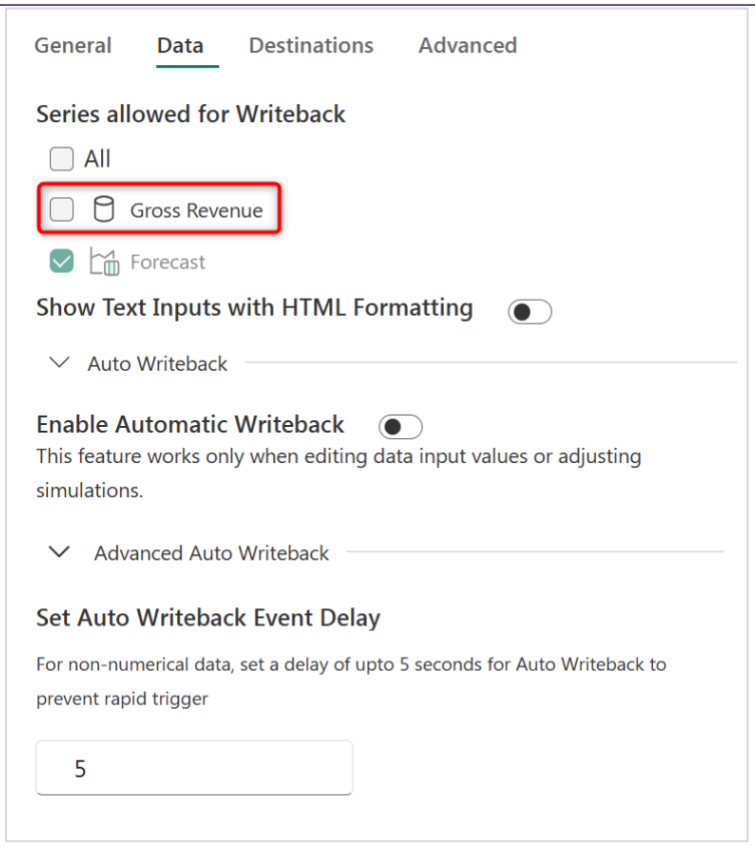
c. Text field length is by default 512 characters for all string columns. This can be customized when adding the writeback destination in step 8.ii.



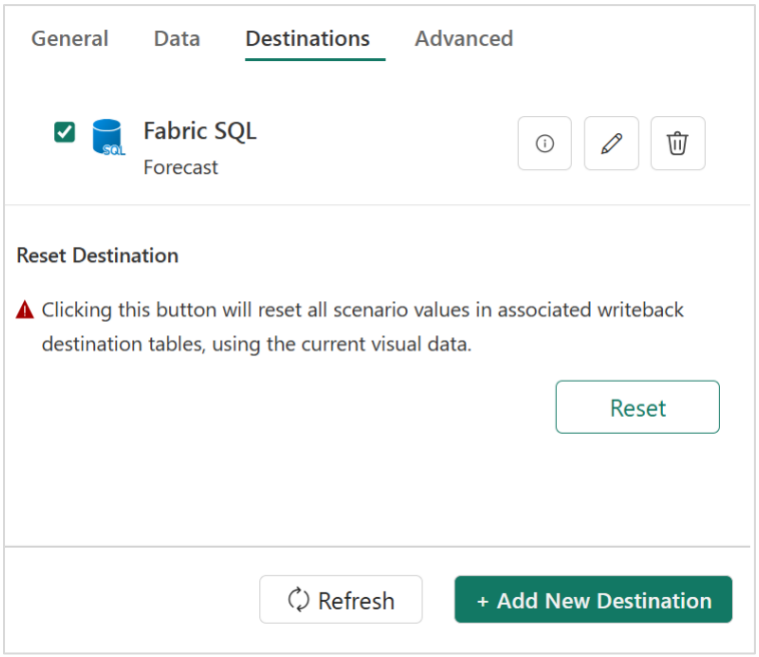
Note: *Confirm Writeback Type is set to Long with Changes.*

10. Explore the remaining settings tabs

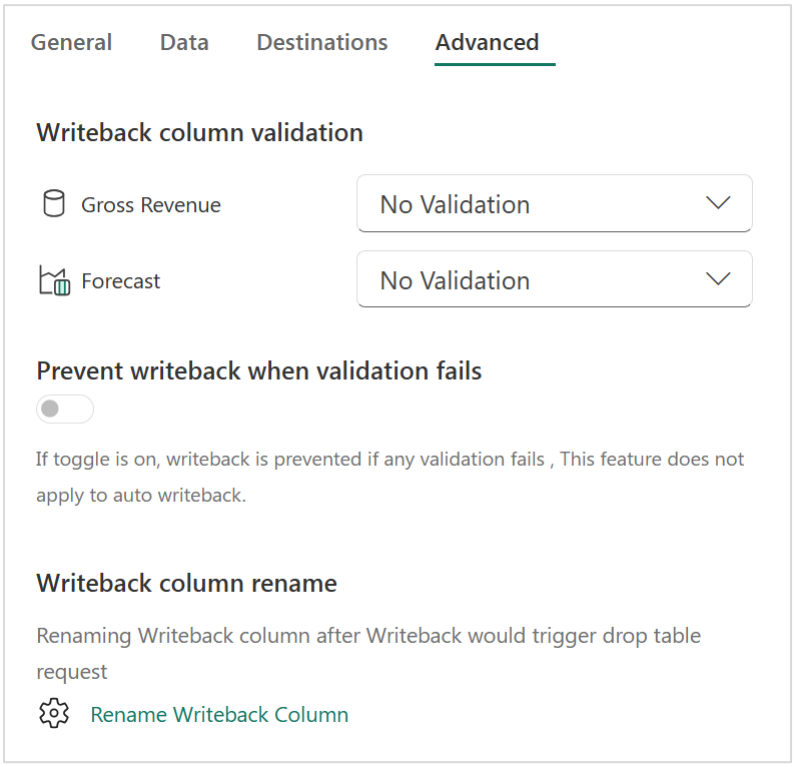
i. Click the Data tab. This is where you choose which measures to write back if you have multiple measures in a sheet. Uncheck Gross Revenue. You can also enable automatic writeback and set the auto writeback event delay here.



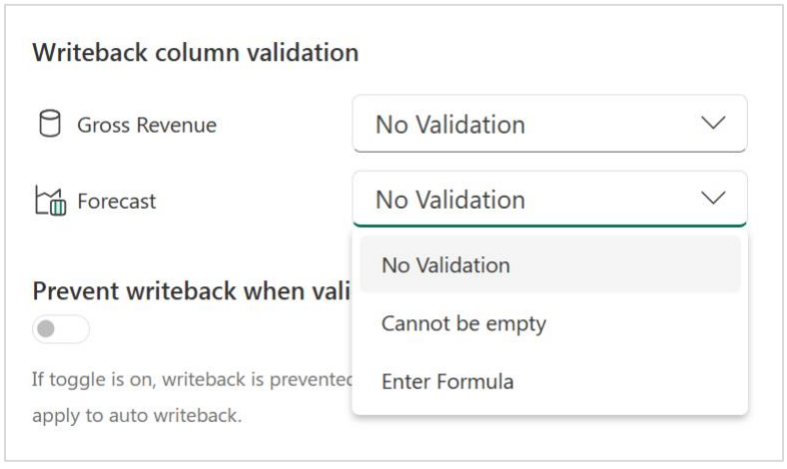
ii. Click the Destinations tab — the destination configured in step 8 appears here. Multiple destinations can be added and managed from this tab.



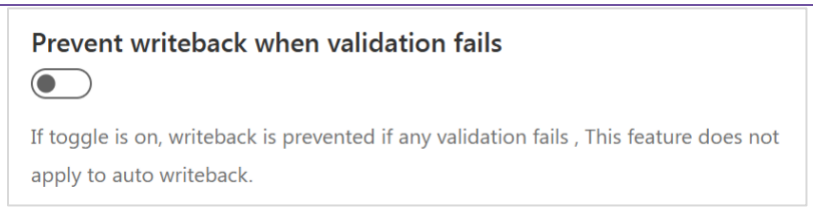
iii. Click the Advanced tab - three options are available here:



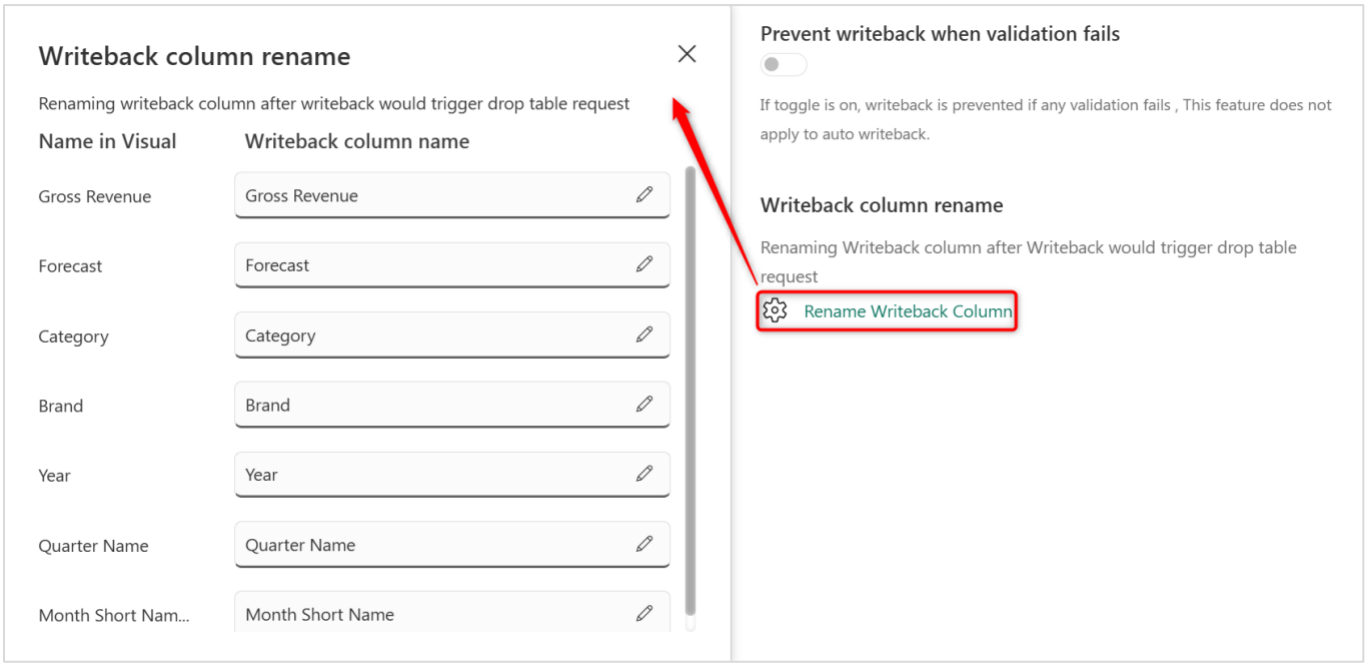
a. Validate writeback columns — Cannot be empty can be used to exclude null cells, or Enter formula to define a condition that must evaluate to true for a cell to be written back.



b. Enable Prevent writeback toggle prevents writeback when validation fails. This is enabled only when a validation rule has been configured.



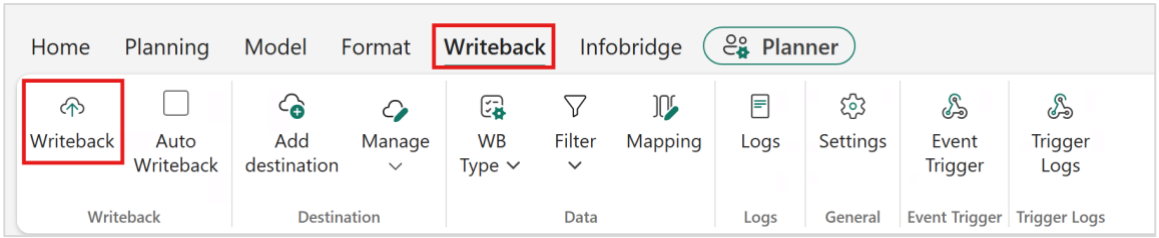
c. Rename writeback columns — Custom column names can be assigned to the writeback table instead of using the source dataset names. Click Rename Writeback Column to explore the column rename dialog box.



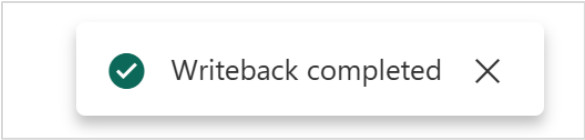
Close the dialog box and the Settings panel.

11. Perform writeback

i. In the Writeback ribbon, click the Writeback option.

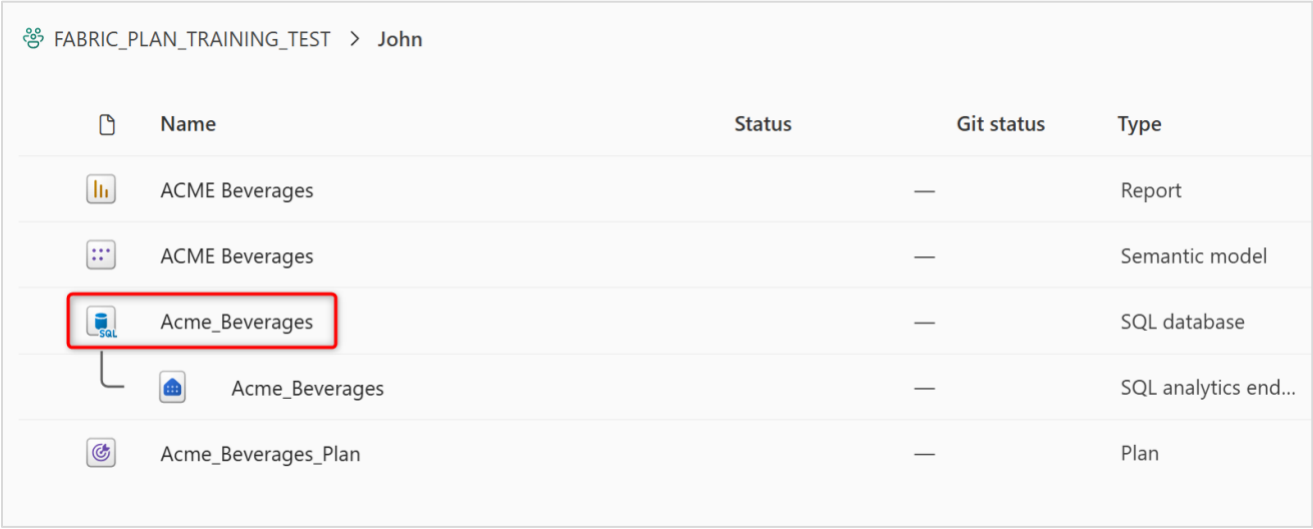


ii. Within a few seconds, a confirmation pop-up displaying Writeback Completed appears, indicating that the forecast has been successfully written back to the Acme_Beverages SQL database.

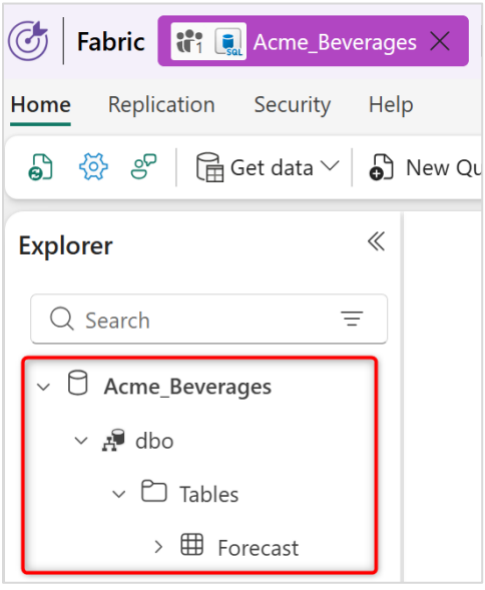


12. View the writeback tables in DB

i. Navigate back to your folder in the training workspace and select the SQL Database.



ii. Expand Acme_Beverages → dbo → Tables and click the Forecast table.



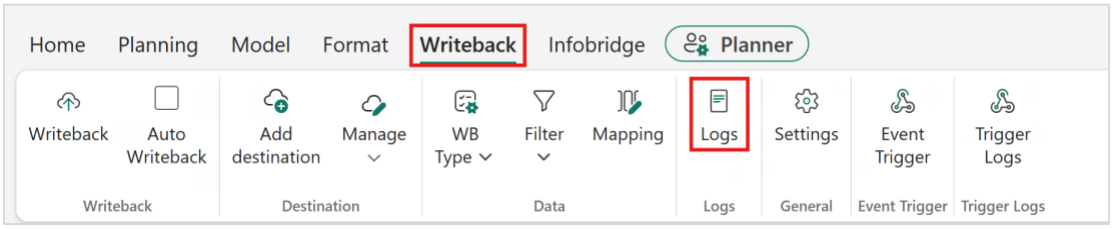
iii. You can see a preview of the table. The forecast has been successfully written back.

Data preview - Forecast

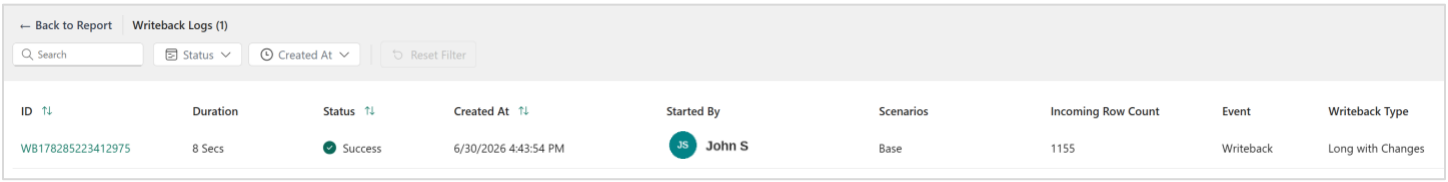
	Irld	IrScenario	Category	Brand	Year	QuarterN...	MonthSh...	ValueCol...	Value	Previous...	ValueText	Previous...	IsLatest	LastUpda...
1	1	Base	Hard Seltzer	FizzJoy	2024	Q4	Oct	Forecast	39417885.92	NULL	NULL	NULL	1	NULL
2	2	Base	Hard Seltzer	FizzJoy	2024	Q1	Feb	Forecast	40138961.94	NULL	NULL	NULL	1	NULL
3	3	Base	Hard Seltzer	FizzJoy	2026	Q4	Dec	Forecast	39744333.48	NULL	NULL	NULL	1	2026-06-30 1...
4	4	Base	Hard Seltzer	FizzJoy	2026	Q2	May	Forecast	38965619.27	NULL	NULL	NULL	1	2026-06-30 1...
5	5	Base	Hard Seltzer	FizzJoy	2025	Q1	Mar	Forecast	37354266.12	NULL	NULL	NULL	1	NULL
6	6	Base	Hard Seltzer	FizzJoy	2024	Q2	All	Forecast	119692751.21	NULL	NULL	NULL	1	NULL
7	7	Base	Hard Seltzer	FizzJoy	2025	Q2	May	Forecast	37806972.42	NULL	NULL	NULL	1	NULL
8	8	Base	Hard Seltzer	FizzJoy	2025	Q1	Feb	Forecast	43708625.83	NULL	NULL	NULL	1	NULL
9	9	Base	Hard Seltzer	FizzJoy	2026	Q2	Apr	Forecast	40212154.38	NULL	NULL	NULL	1	2026-06-30 1...
10	10	Base	Hard Seltzer	FizzJoy	2025	Q1	All	Forecast	120427939.08	NULL	NULL	NULL	1	NULL
11	11	Base	Hard Seltzer	FizzJoy	2025	Q1	Jan	Forecast	39365047.13	NULL	NULL	NULL	1	NULL
12	12	Base	Hard Seltzer	FizzJoy	2025	Q3	Sep	Forecast	41934747.67	NULL	NULL	NULL	1	NULL
13	13	Base	Hard Seltzer	FizzJoy	2026	Q1	Feb	Forecast	42555744.26	NULL	NULL	NULL	1	2026-06-30 1...
14	14	Base	Hard Seltzer	FizzJoy	2024	Q1	Jan	Forecast	42579354.41	NULL	NULL	NULL	1	NULL
15	15	Base	Hard Seltzer	FizzJoy	2025	Q3	Jul	Forecast	39350934.04	NULL	NULL	NULL	1	NULL

13. Explore the logs

i. In the Writeback ribbon, click Logs.



ii. Writeback logs tab opens. You can view details such as status, duration, the person who performed the writeback, the measures that got saved, and the writeback type.



Outcomes

- ✓ Rolling Forecast sheet built with 2024–2025 actuals and a blank Forecast measure covering Jan–Dec 2026.
- ✓ Statistical Forecast run bottom-up across the full Jan–Dec 2026 horizon using 24 months of actuals — Trend Decomposition with MSTL algorithm, 4% growth factor.
- ✓ January 2026 actuals revealed and compared against the forecasted value ($1,544M forecast vs $1,552M actual).
- ✓ January 2026 closed — actuals locked in, forecast horizon extended to Jan 2027.
- ✓ January 2027 seeded from January 2026 actuals ($1,552M) and reforecast at $1,615M with a 4% growth assumption.
- ✓ Writeback destination configured — Forecast table in Acme_Beverages, Long with Changes format.
- ✓ Forecast written back to the SQL database and verified in the Forecast table.
- ✓ Writeback logs reviewed — status, duration, writeback type, measures, and user confirmed.