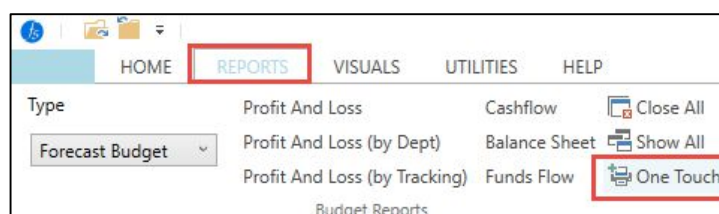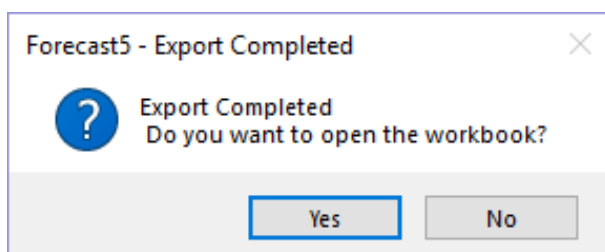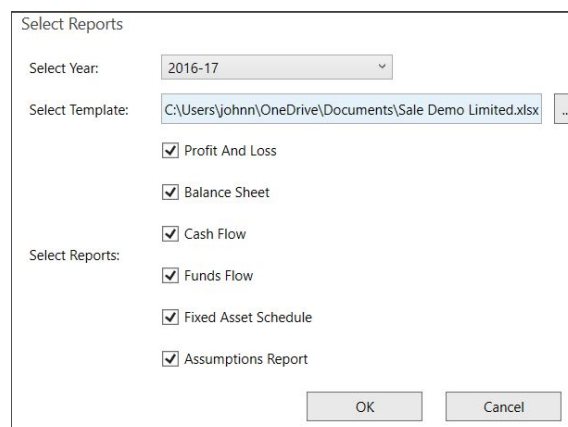# Forecast 5: One Touch Reporting

## Overview

The One Touch Reporting (OTR) feature is designed to reduce the amount of time taken to produce final, quality reporting.

## Step by Step Guide

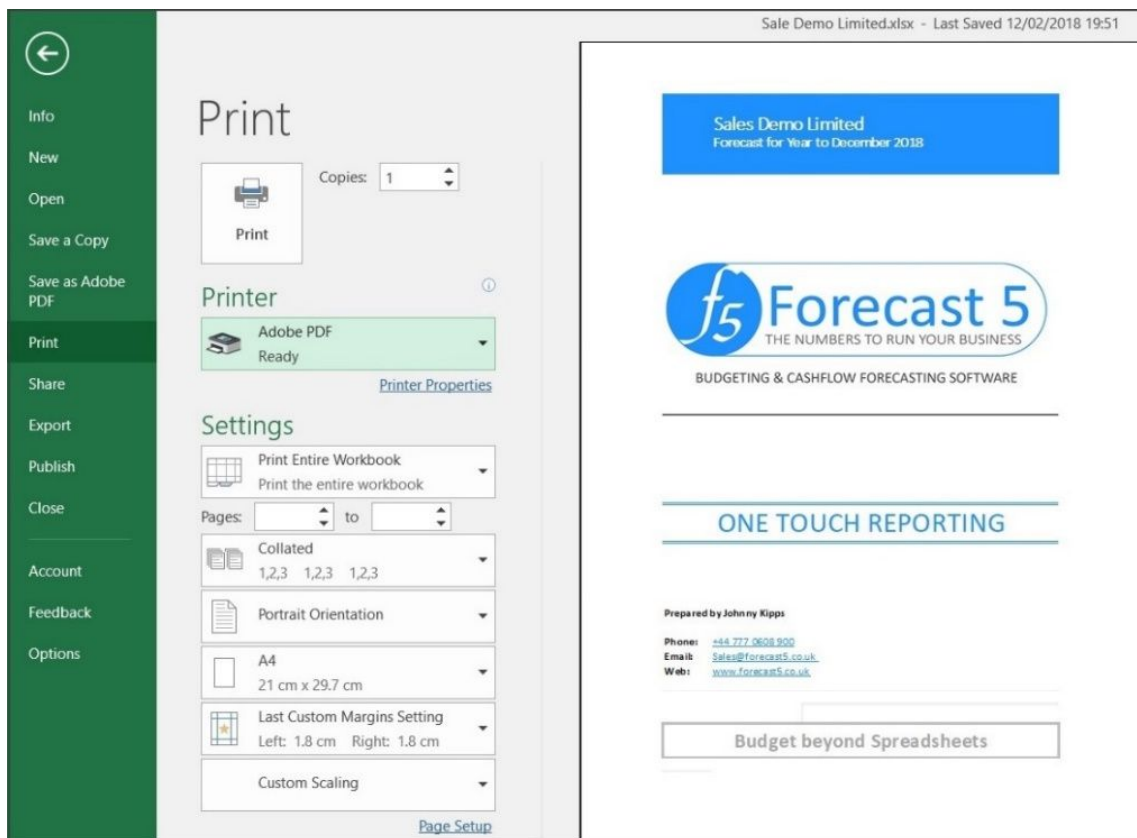1. Select the one touch Icon from the reports menu



2. *At the "Select Reports" screen, choose the year, select your preformatted Excel template and the reports you want printed. The Excel template can contain your company logo, disclaimer and any other information you want in the report, formatted entirely as you wish.*
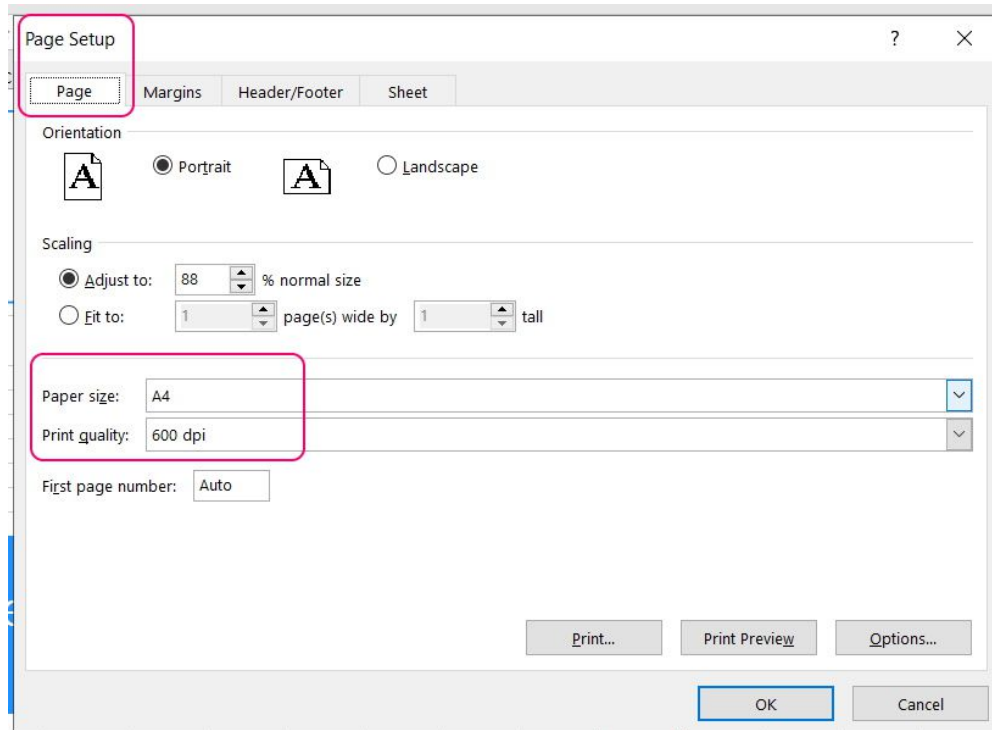




3. Once the export has completed, click Yes to automatically open the report. Once open, you will see each of the selected reports and preformatted pages are all their own tabs.

By default, the report is renamed with your forecast name and is saved to Windows 10 "Documents" folder as a security copy. And as you re-run the OTR for the particular forecast, the reports will continue to be re-saved to the "Documents" folder.

4. If you don't need the security copy – you've saved your template somewhere else – delete the security copy before re-running OTR to avoid conflicts. And remember to close any OTR workbook that might be open before running another with the same name – normal Excel skills apply.

5. For a report with multiple years, return to Forecast 5 and rerun OTR, selecting the additional years, e.g. 2019, 2020, choosing the newly saved template and the subsequent year reports will be added as new sheets to the work book.



6. Use Excel's "Print the Entire Workbook" command and you have a professional quality suite of reports, completed in minutes.

7. Finally, if you print to a pdf and the reports divide into multiple pdfs, go back and ensure that each page is formatted in Excel with Page Setup\Page set to "Page size" = A4, "Print Quality" = 600dpi

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