

Installing a custom report

How to install a custom report in Moneyworks

Save the emailed attachment

When you purchase a report from Sustainable Solutions the file will be emailed to you as an attachment. Save it to a convenient location on your hard disk.

Open your existing reports index



With your Moneyworks Data file open, Choose **Reports > Index to Reports**

Open your Custom plug-ins folder:

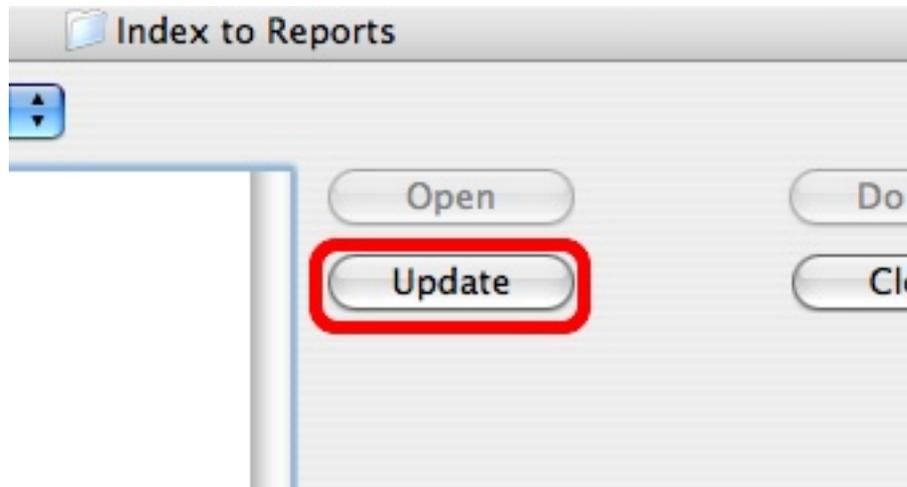


- i. Choose **Custom Reports** from the pop-up menu above the reports list.
- ii. Click the folder icon to the left of the pop-up menu

Move your new report to the reports folder inside Moneyworks Custom plug-ins

Using Finder (Mac) or Windows Explorer, copy the saved file to the Reports folder that has just been revealed inside your Moneyworks Custom Plug-ins folder.

Update your reports list in Moneyworks



Click the **Update** button in the reports index window to show your report in the list
You can now click on the report and then click **Do it** to run the report

Techie stuff- where is that *!??* folder?

(From the Moneyworks user guide:)

The location of the Moneyworks Custom plug-ins folder varies, depending on whether you are hosting MoneyWorks on your computer, or are connecting to another machine using Gold or Datacentre.

For a local document:

- In the same folder as the document

For a document you connect to on a Gold server:

- In the same location as the standard plugins folder (see above)

For a document you connect to on a Datacentre server:

- If there is a custom plugins folder for the document on the server, it will automatically be downloaded to (Mac):

~/Library/Application Support/Cognito/MoneyWorks Gold/
<datacentre_name>/<subfolders>/MoneyWorks Custom Plug-Ins

or on Windows to:

C:\Documents and Settings\USERNAME\Application Data\Cognito\MoneyWorks
Gold<datacentre_name>\<subfolders>\MoneyWorks Custom Plug-Ins

where <datacentre_name> is the name of the Datacentre server as set in its configuration page, and <subfolders> is the subfolder hierarchy (if any) that the document resides in within the Datacentre document root folder on the server.

2. Set the pop-up menu at top left from All Reports to Standard Reports or Custom Reports

3. Click the folder icon next to the pop-up menu

The selected folder will be revealed in the Finder (Mac) or Windows Explorer.