

## A CHREOS REPORT

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<b>Application</b>	ChreosClient – Chreos 3
<b>Minimum service pack</b>	SP26
<b>This document</b>	To Save and Install a Chreos Report Ref 15.12 Release 1 Published January 2003

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### Overview

From time to time new reports are sent out by e-mail or are downloaded from the web. These need to be extracted and saved into an appropriate folder and then linked into Chreos.

Note: All of the commands, names of buttons etc may be worded slightly differently depending on your e-mail application and version, and the version of WinZip that you are using.

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### To Save a Report From an E-Mail

Note: These instructions are based on the functionality in version 5.5 of “Outlook Express”. Other versions or other e-mail applications may require you to follow slightly different processes.

If the report has arrived by e-mail:

- The report will appear as an attachment on an e-mail from Wild Software Ltd. It may or may not be a ‘zip’ file. If it is it will need to be unzipped. Refer to “To Unzip a Report” on this information sheet.
- Right click on the report attachment and select ‘Save as’ or double click on the report attachment and select ‘Save to disk’.
- The “Save attachment as” screen will appear. You will need to select the directory where all of your reports are located. This will usually be something like “C:\Chreos\Reports”.
- Change the ‘File name’ if required.
- Click the [Save] button.
- Note: The report will need to be saved into the reports directory on every machine that will need to have access to it. If it is only saved on one machine then you will only be able to view the report on that machine.

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## To Save a Report From the web

Note: These instructions are based on the functionality in version 5.5 of “Internet Explorer”. Other versions or other internet browser applications may require you to follow slightly different processes.

If new reports are available from the Wild Software website:

- Click ‘Download’ link under the heading “Get the latest Chreos reports”.
- Click ‘Reports updated since. . .’ link.
- The “File download” screen will appear. Select ‘Save this file to disk’ and click the [Save] button.
- The “Save attachment as” screen will appear. You will need to select the directory where all of your reports are located. This will usually be something like “C:\Chreos\Reports”.
- Change the ‘File name’ if required.
- Click the [Save] button. The file will be saved into the selected directory. The file will be zipped.

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## To Unzip a Report

If the report needs to be unzipped:

- Select the directory that the report attachment was saved into, for example “C:\Chreos\Reports”.
- Double click on the report attachment and the “WinZip” screen will appear. If you have not registered WinZip yet, read the screen and if you agree with the statement click the [I Agree] button. Note: If you do not agree you will not be able to proceed with unzipping the file.
- The contents of the zipped file will display. This could be one report or many. Click the [Extract] button.
- The “Extract” screen will appear. Select the data path for the report to be saved to. Save the report to the same file that the report attachment was saved to, for example “C:\Chreos\Reports”. Click the [Extract] button.
- The “Extract” screen will disappear and the previous screen will be displayed. Close that screen.
- The report will now be available to be installed in Chreos.
- Note: Once you have unzipped the file you will need to go back into the reports directory using “File Explorer” and delete the original zipped file.

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## To Install a Report in Chreos

- Log into ChreosClient.
- Select the menu option “Maintenance | Advanced | Report Linking”.
- Click the [Install] button.
- The “Install reports” screen will appear.

- Each report that you have just saved from the e-mail or website will now be displayed in the list on the left-hand side. Select those that you wish to install.
- Drag and drop the into the required 'Client report group' or 'Server report group' in the middle of the screen. Usually you will select a 'Client report group' however, when it is a report that is automatically printed from within another Chreos menu option, (for example a debtor invoice, supplier order or price labels), it will need to be saved into a 'Server report group'. Note: If any report that is a Server report will only need to be installed on the machine running ChreosServer. It will not also have to be saved onto any ChreosClient machine.

Note: To create a new group right click in the 'Client reports' area and select 'New group'. Enter the new group name. It will then now be added to the list.

- Click the [Install] button. You will now be back at the original "Report linking" screen.
- To preview or print the report select the 'Group' that the report was installed into from the 'Group' combo at the top of the screen. Select the report from the list and preview or print as required.

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