Creating and Storing PDF Files

There are times when it is better to create a PDF (portable document file) from an existing file before saving it or emailing it to the document store.

This is particularly useful for complex spreadsheets, for example spreadsheets that have multiple pages or include formulae, where the Gold Viewer is unable to display them properly when viewed from a classic Gold Terminal.

Set Up

The PDF Creator software must be installed on the pc in order to create a PDF document.

PDF Creator is a free tool to create PDFs easily from nearly any application. Ibcos has added this program to the document store directory so that users can easily install it on their pc.

- From an Internet Explorer screen enter the following:
  http://docstore/ibcos/windows
  (Where docstore is the name of the document store).

- Click on the PDF Creator setup.exe file.
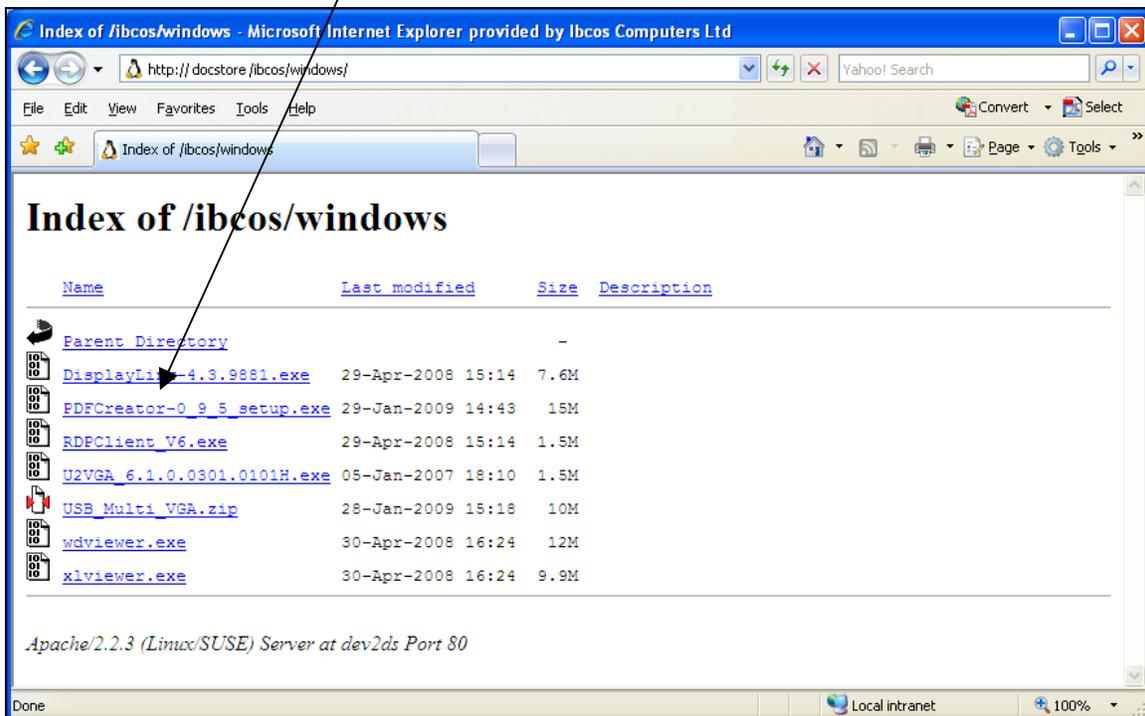
- Click on "Run" to install the software.
  If an Internet Explorer Security Warning message is displayed due to the publisher being unknown, click "Run" again to continue.

- Select "English" as the language.

- **Set up – PDF Creator**
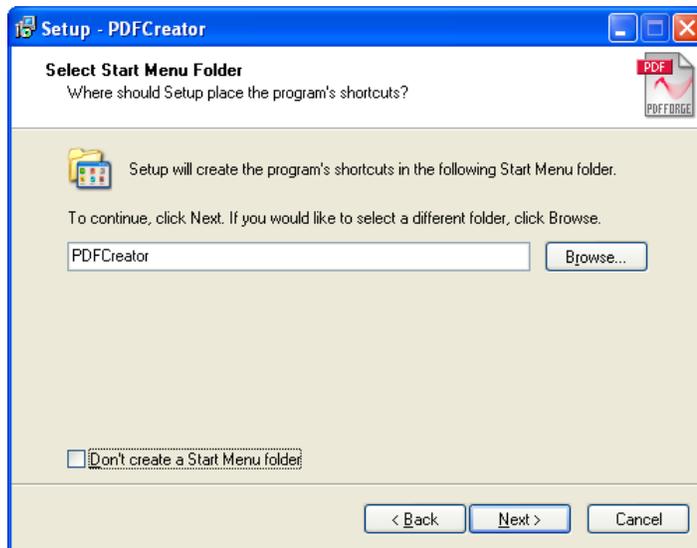 Click "Next" to continue.

- **License Agreement**
  Read the licence agreement then select: "I accept the agreement" and click "Next".
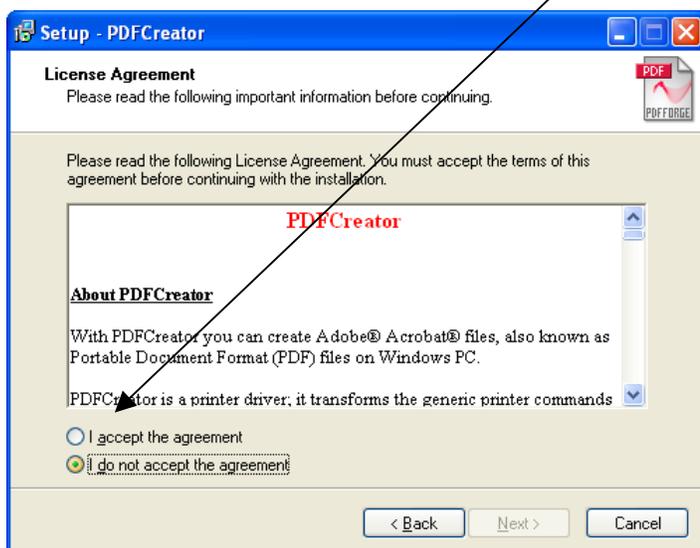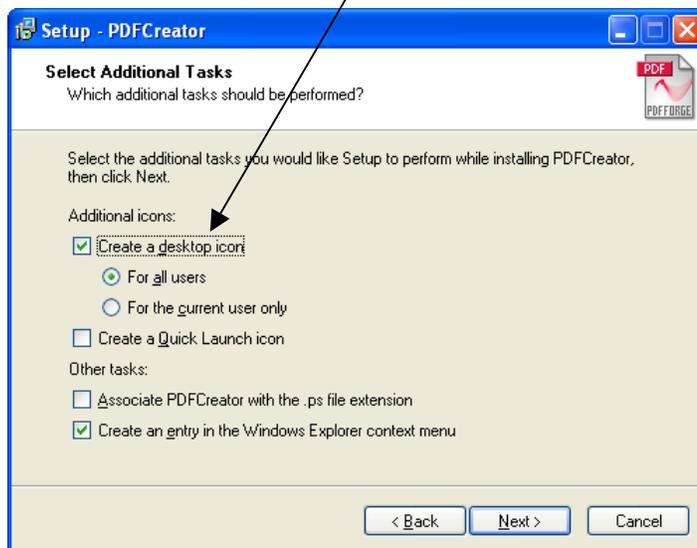
- **Type of Installation**
  Select "Standard Installation" and click "Next to continue.

- **Printer Name**
  Choose a printer name. It is recommended that the default name of "PDFCreator" be accepted. Click on "Next.

- **Select Destination Location**
  It is recommended that the default of C:\Program Files\PDFCreator be accepted. Click on "Next".
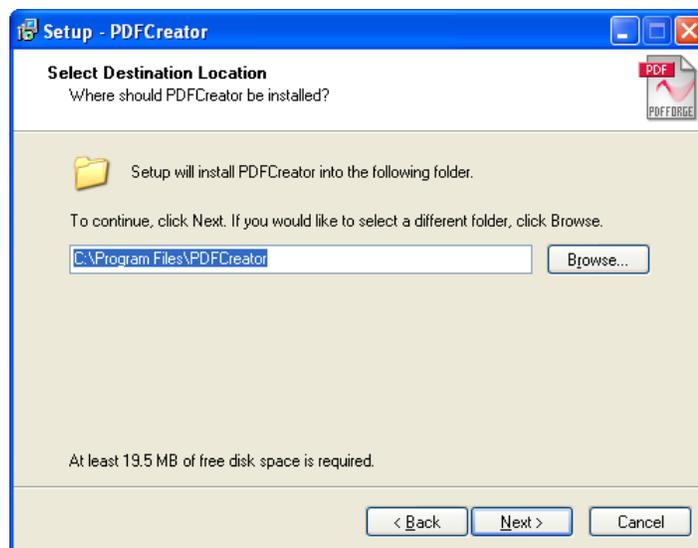
- **PDFCreator Toolbar**
  Click "Next" to continue.

- **Select Components**
  It is recommended that the option for "PDFCreator Toolbar for Internet Explorer and Firefox" is unselected before continuing. Un-tick this option then click "Next".

- **Select Start Menu Folder**
  Accept the default start menu folder or tick the option for "Don't create a Start Menu folder". Click on "Next".

- **Select Additional Tasks**
  The option to "Create a desktop icon" can be un-ticked if this is not required.
  Click on "Next.

- **Ready to Install**
  Review the settings then click "Install" to continue.

- When the installation is complete, click "Finish".

Storing a Spreadsheet as a PDF and Emailing to the Document Store

- Open the spreadsheet (or other document) in the normal way.

- Select "Print".

- Change the Printer to "PDFCreator" using the drop down list.
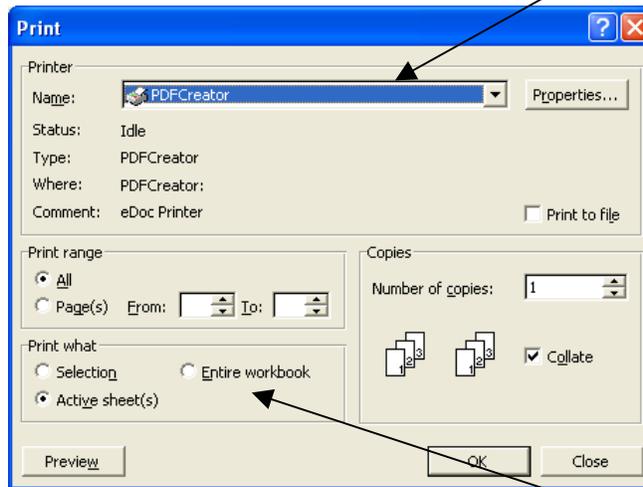
Note: if the spreadsheet has multiple pages, select "Entire Workbook". Click "OK" to continue.

- In the PDFCreator window enter details such as a "Subject" if required.
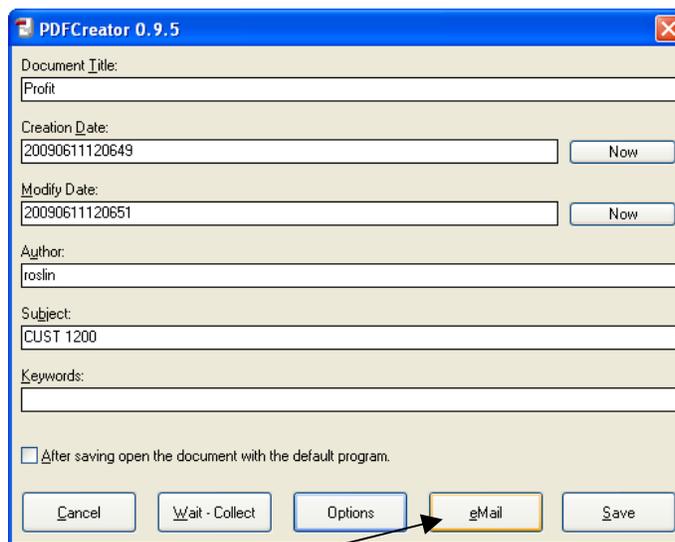
- Click on "eMail".

- Select a directory. This could be a temporary directory and is used to create the file ready for emailing.

- The file will be created and attached to a blank email (using the default email program) ready for sending.
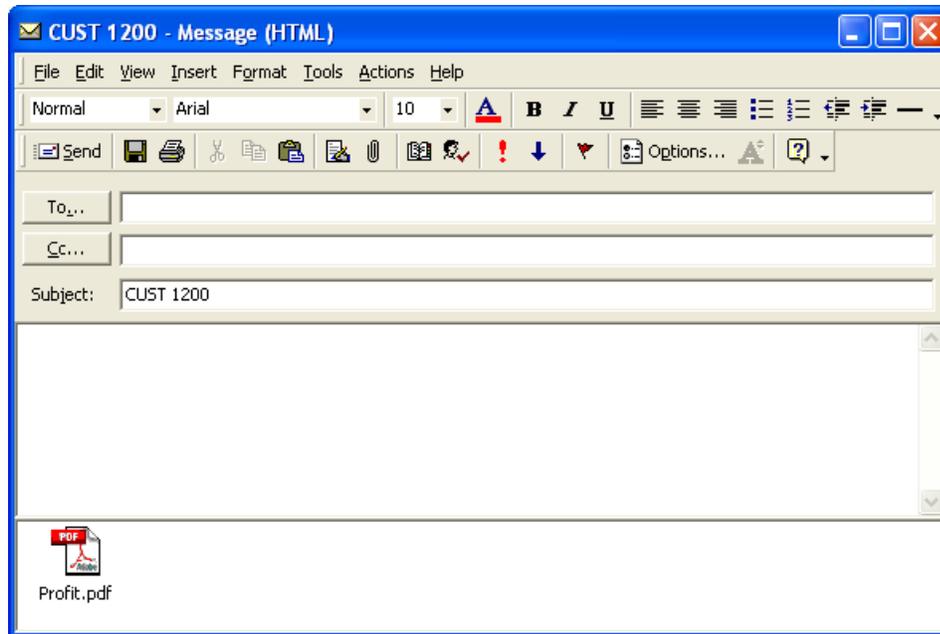
- Enter the email address for the Gold Document store and click "Send", for example with a subject line of CUST 1200 to store against customer account 1200.

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