

IES Set Up: PDF Creator

Purpose

The purpose of this Document is to provide guidelines for the set up of PDFCreator to be used with IES for seamless PDF creation of Report Documents.

Introduction

PDFCreator is only 1 among many PDF creation software options, and it has been selected for use with IES for the following reasons: -

- ✓ It is Open Source Software, and free.
- ✓ It is a high quality solution, and offers the necessary functions for seamless integration with IES.

PDFCreator is available with source under the GNU license, and is available not only from the IES website, but also from other locations on the Web. PDFCreator is not an Infolab product, but it is integrated for use with IES, and as such may be downloaded from www.infolab.cc or other Web locations, for use with full rights provided under the GNU license.

PDFCreator should be installed when PDF creation options are required with an IES installation.

Install


After downloading the software, PDFCreator may be installed by following the install script, and it is not necessary to install PDFCreator on all workstations, but it has to be installed at Client Workstations (together with NaviX / Navigator) where PDF creation functions will be used, or else it must be installed as a 'server based network printer' (this option is available during installation) which is then made available to all workstations. In all cases the PDFCreator printer name must be "PDFCreator".

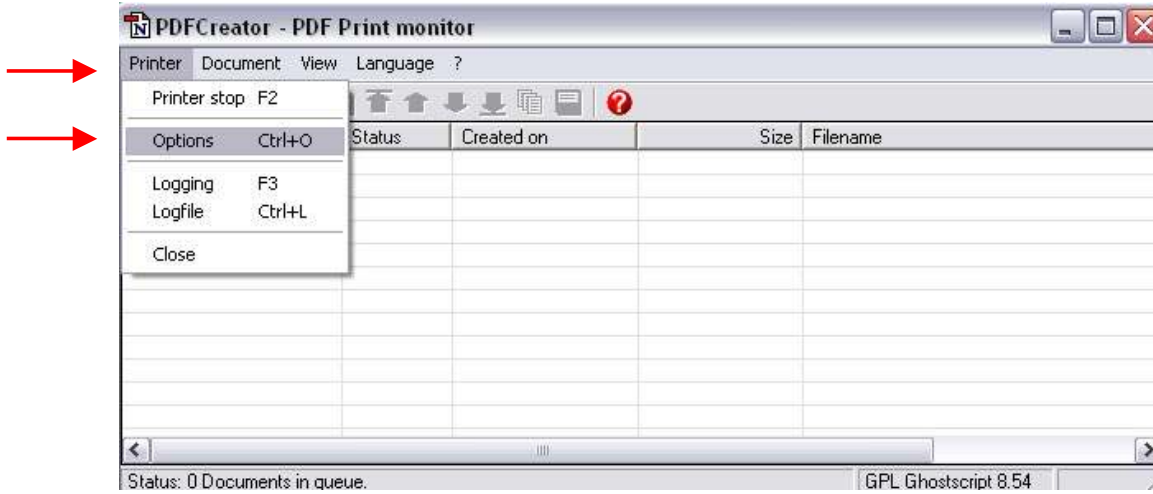
NOTE: It is a requirement that an IES fastdrive be set on the System Main Parameters for the PDF functions to work.

Adjust Settings after Installation

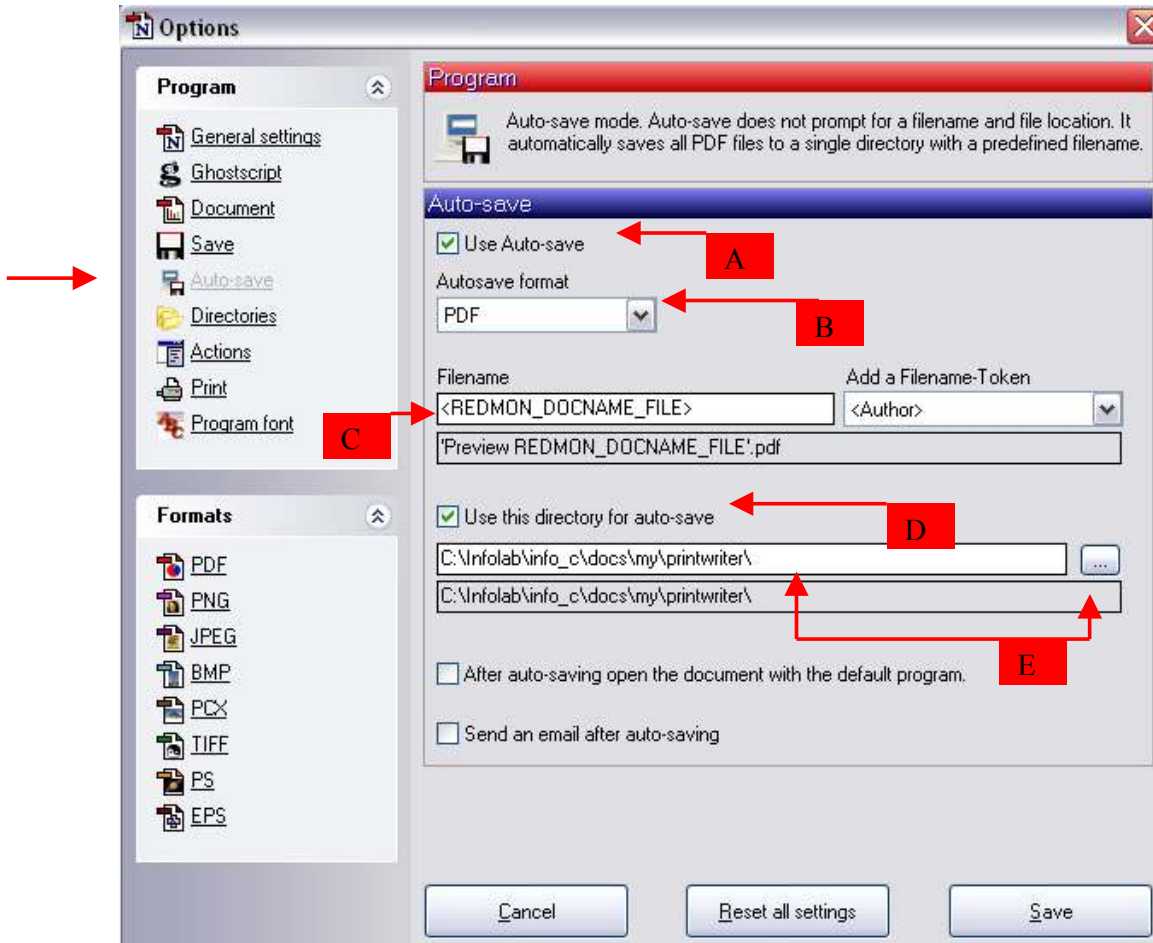
Once installed, it is necessary to adjust some settings in order for PDFCreator to work seamlessly with IES.

Just open the PDFCreator Print Monitor by clicking on the PDFCreator shortcut installed on the desktop, and then choose "Printer" then "Options", as shown below -

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The screen shown below will appear after choosing "Options". Now click "Auto-Save" on the left.



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At "A", check the box that says 'Auto-save'.

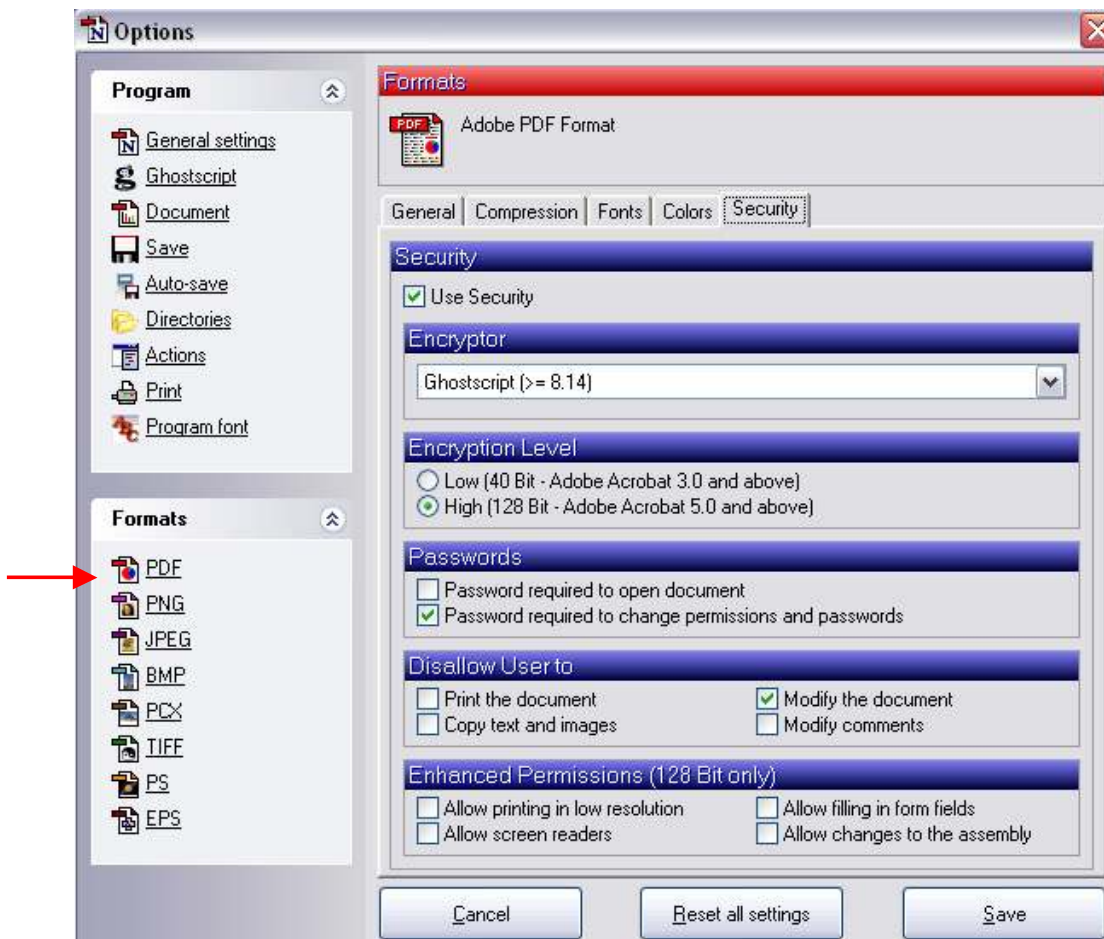
At "B", choose PDF.

At "C", state the FileName exactly as shown.

At "D", check the directory for auto-save.


At "E", use the browse option to locate the folder "printwriter" on the NaviX/Navigator installation path, as shown. In the example shown, this would be the path on the Server. **For all Client Workstations, this path should point to the FastDrive as mapped, e.g. "Z:\printwriter\" ...**

SAVE the settings. Now choose "PDF" under 'Formats' as shown below.



Choose the security tab, and select the security settings that will be appropriate for the PDF's you will produce – not necessarily exactly as shown, i.e. your choice.

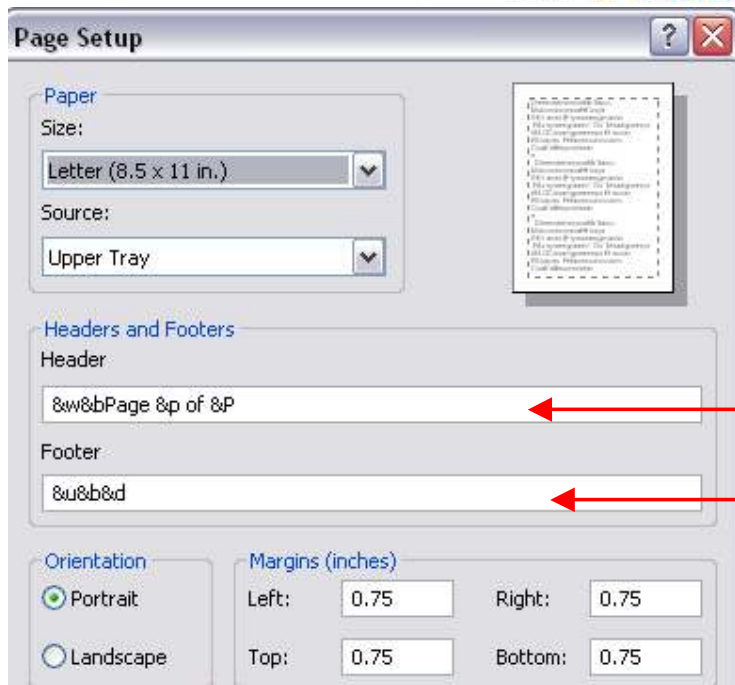
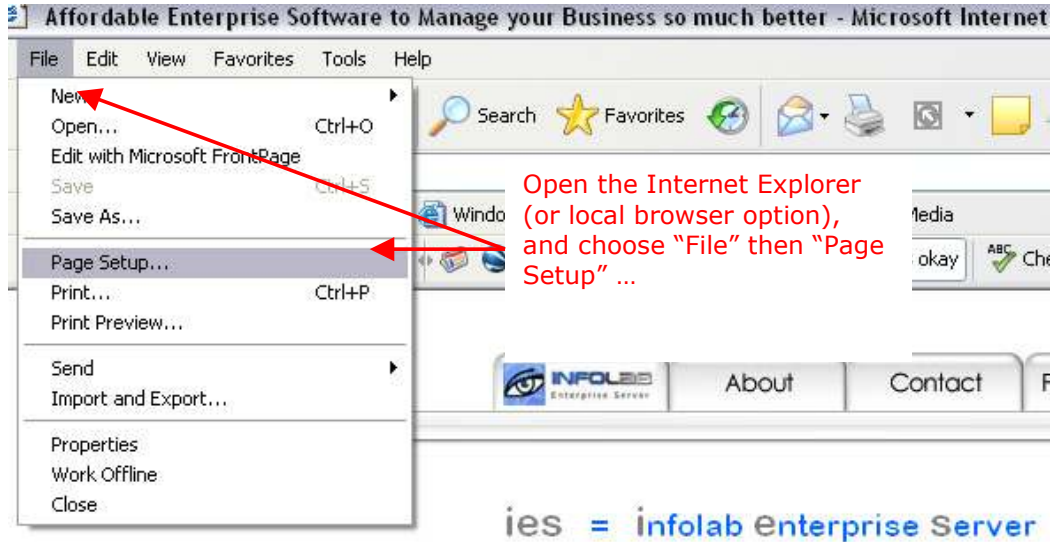
Hint: Since the PDF's to be produced will include Statements and Invoices that are e-mailed seamlessly to Customers, it is recommended that you disallow modification of the PDF documents that will be created.

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Please SAVE the settings as adjusted. PDFCreator is now set for seamless operation with IES, and will automatically be sensed by IES where available on a Workstation.

A note about Page Setup

To ensure that the PDF reports do not display local FileNames as headers and footers on the documents produced, please adapt the page setup, as shown: -




On the page setup, please delete the header and footer intructions ...

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