Formatting PDF Documents for Uploading to Onsite Track Easy

Introduction

As part of entering information into Onsite Track Easy, users are often required to upload supporting documents. Onsite Track Easy currently has a size limit of 2Mb for uploaded documents, which may be too low for some necessary files.

This document details how to download, install and use two free programs to compile PDF documents for uploading to Onsite. These programs include:

- PrimoPDF – installs as a 'virtual printer', allowing images and/or documents to be converted to PDF;
- PDF Split & Merge (pdfsam) – allows pages from a PDF document to be rearranged, deleted, rotated and/or merged with other PDF documents.

NOTE: This procedure only applies to systems running Windows operating systems (in this example, Windows XP with Internet Explorer). Some programs may not be available on other operating systems.
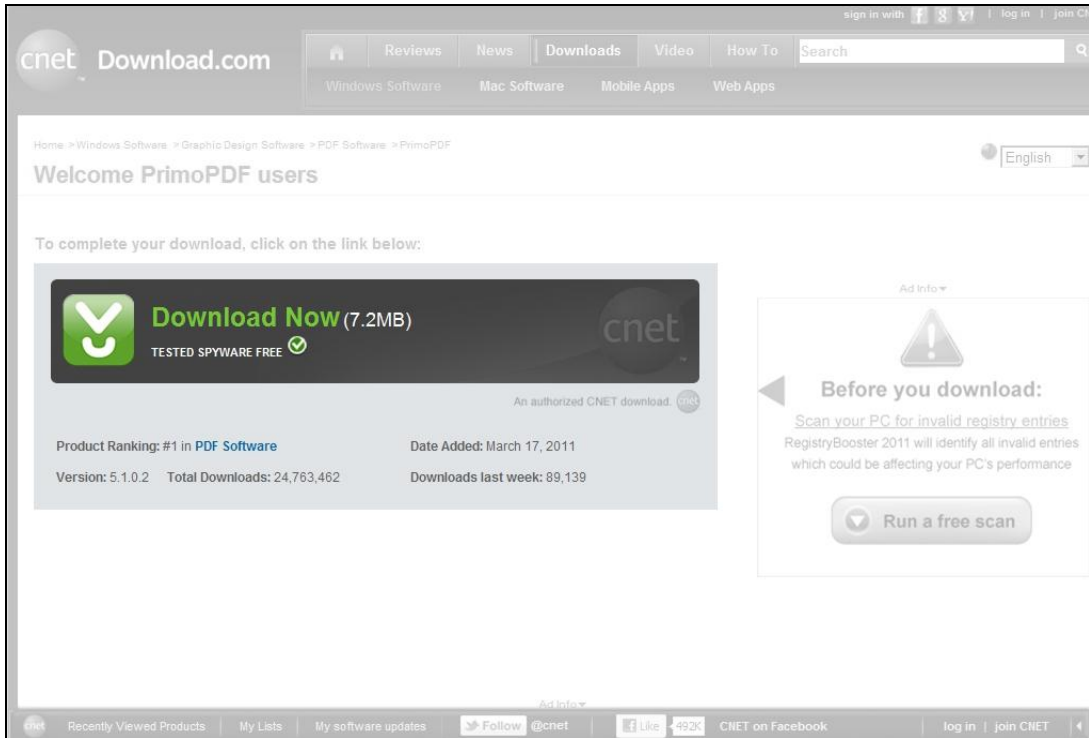
Downloading & Installing Programs

PrimoPDF

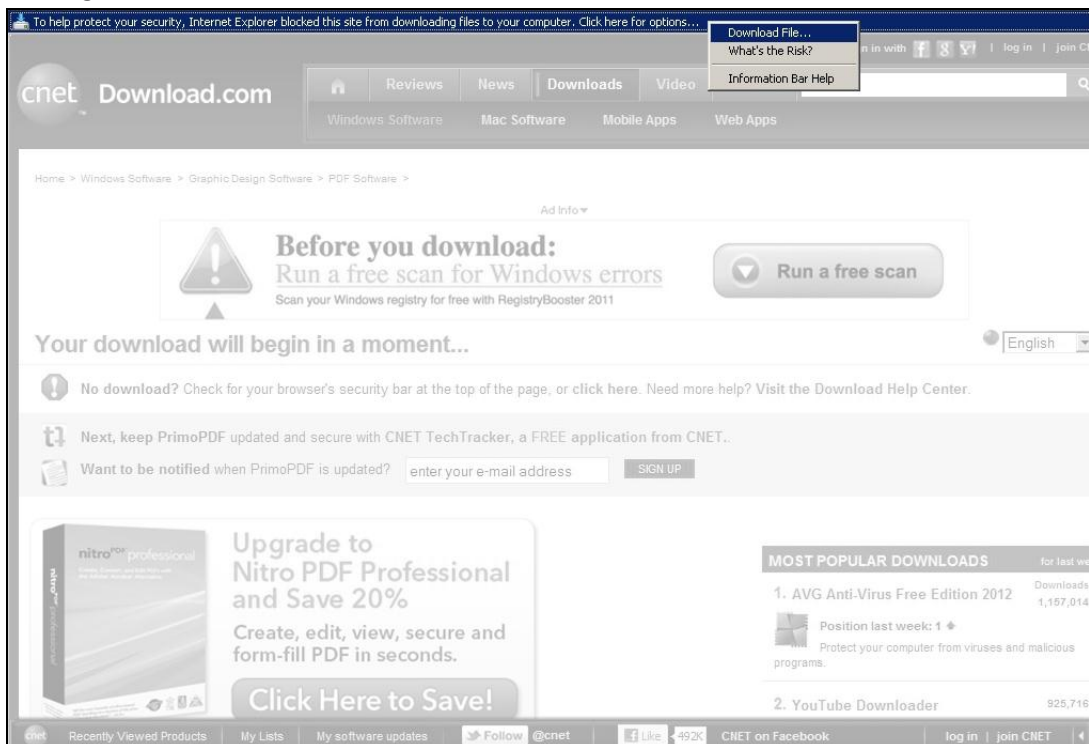1) Navigate to primopdf.com and click on "Download Free".

2) Click "Download Now".

Note: If Internet Explorer prevents you from downloading the file and displays the blue bar at the top of the window, right-click the bar and select "Download File".
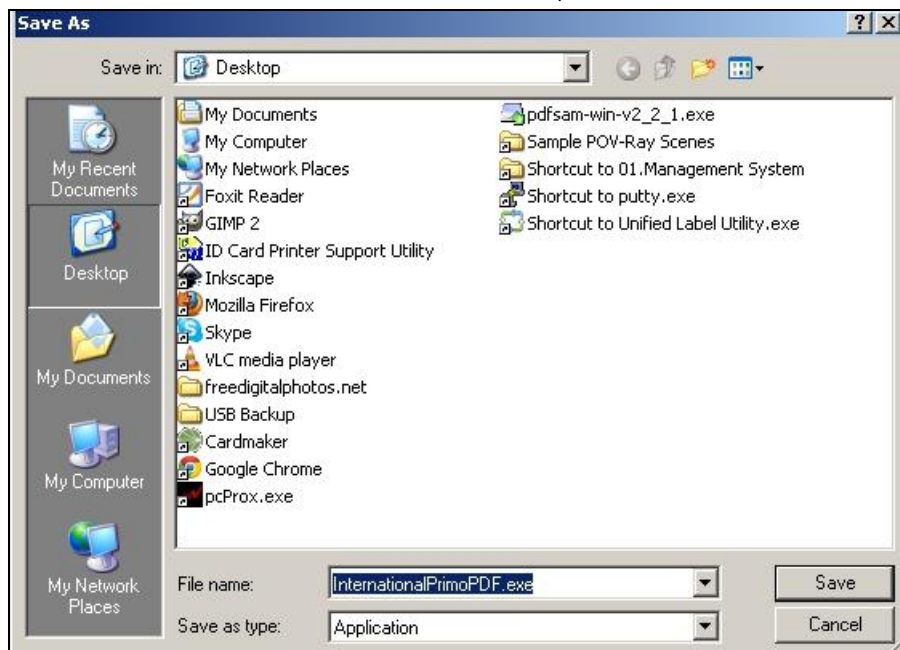
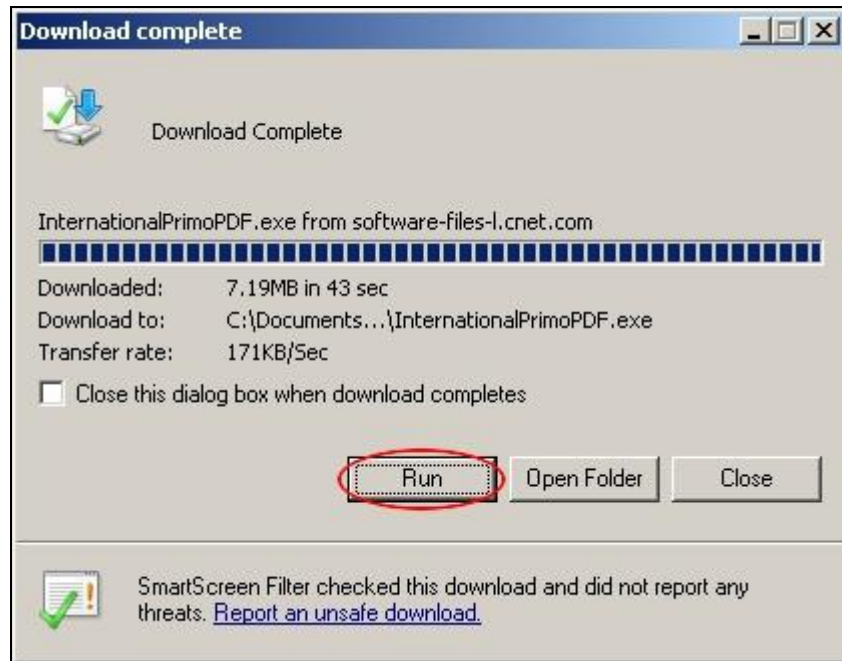3) When asked to run or save the file, click "Save".

4) Select the location in which to save the PrimoPDF installer, then click "Save".

5) Once the file has downloaded, click "Run" to begin the installation.

6) To prevent programs automatically installing themselves on your computer, Internet Explorer may ask if you want to run the file. Click "Run".

7) Ensure "English" is select as the Installer Language before clicking "OK".

8) At the Setup Wizard introduction screen, click "Next".

9) Read the EULA and click "I Agree" if you agree with the conditions for using the software.

10) Ensure the "Do not install PC Speed UP" radial button is selected. This stops an unnecessary application being installed. Click "Install" to install PrimoPDF.

11) After installation is completed you will be asked to register PrimoPDF. This is not necessary, but you may complete the registration if you wish. Then click "Next"

12) Click "Finish" to complete the PrimoPDF installation procedure.

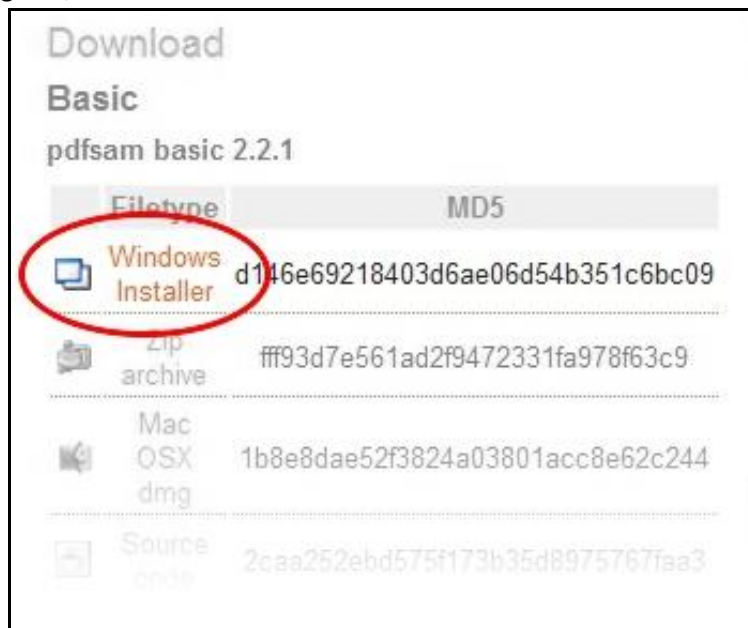## PDF Split & Merge (PDFsam)

1) Navigate to pdfsam.org and click "Download".

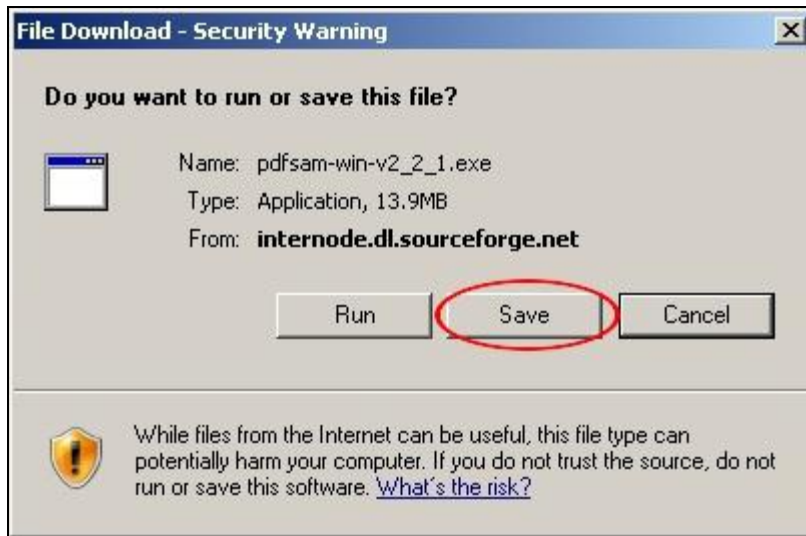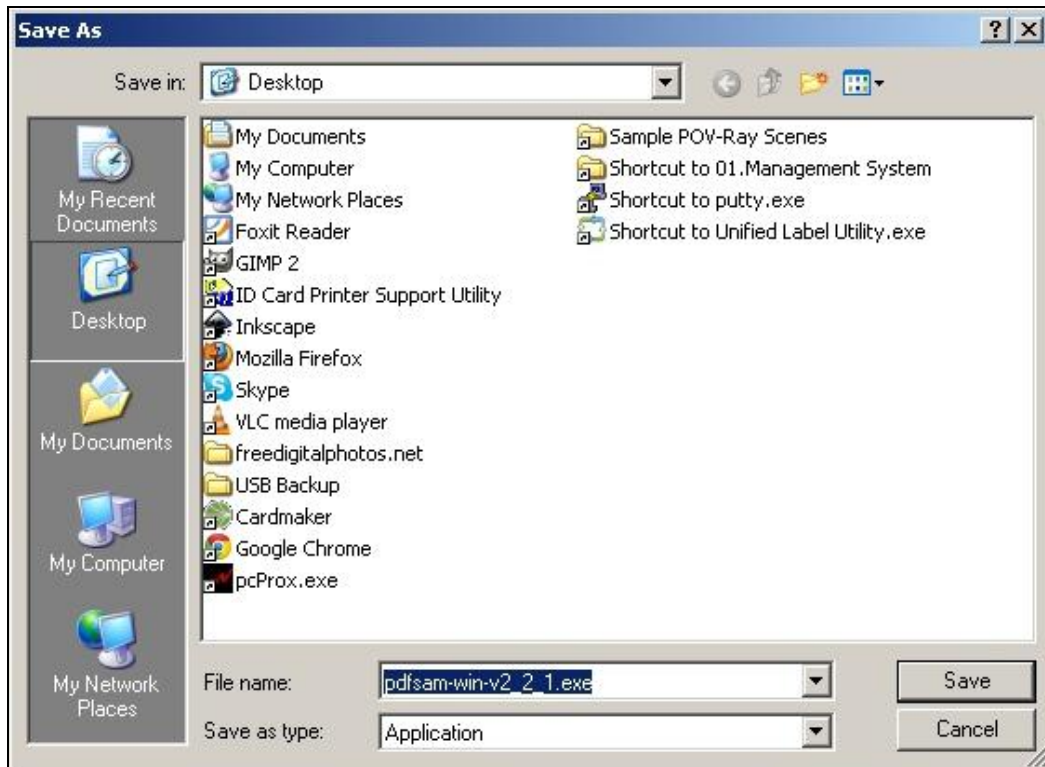
2) From the options given, click "Windows Installer".

Note: If Internet Explorer prevents you from downloading the file and displays the blue bar at the top of the window, right-click the bar and select "Download File".

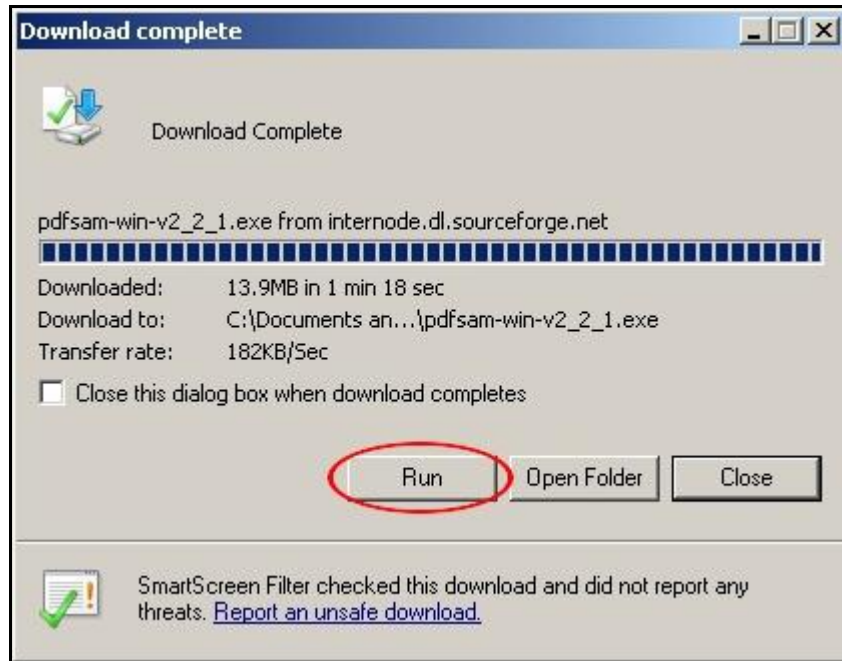3) When asked to run or save the file, click "Save".

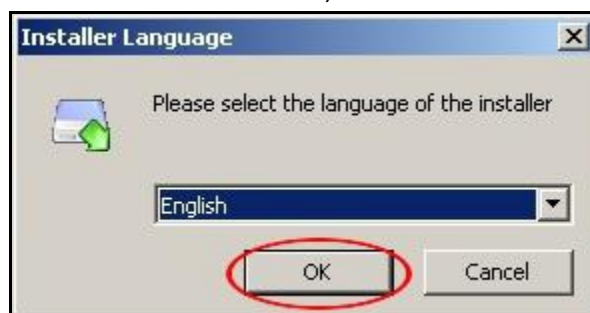4) Select the location in which to save the PDFsam installer, then click "Save".

5) Once the file has downloaded, click "Run" to begin the installation.

6) To prevent programs automatically installing themselves on your computer, Internet Explorer may ask if you want to run the file. Click "Run".
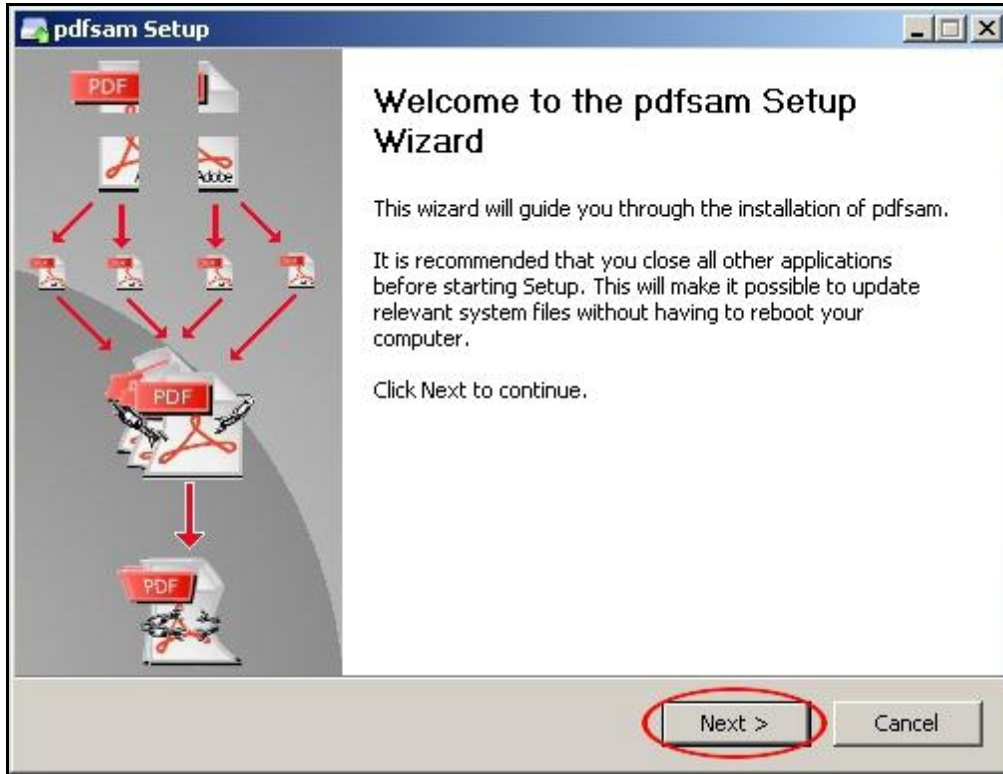

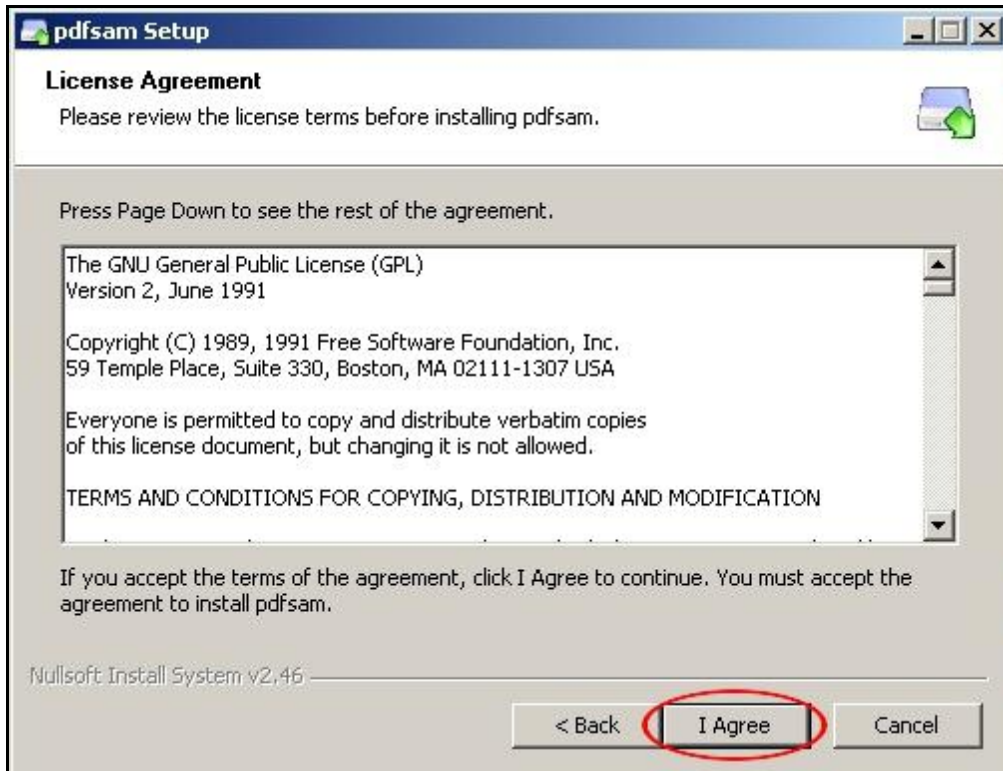7) Select the language you wish for the installer to use, then click "OK".
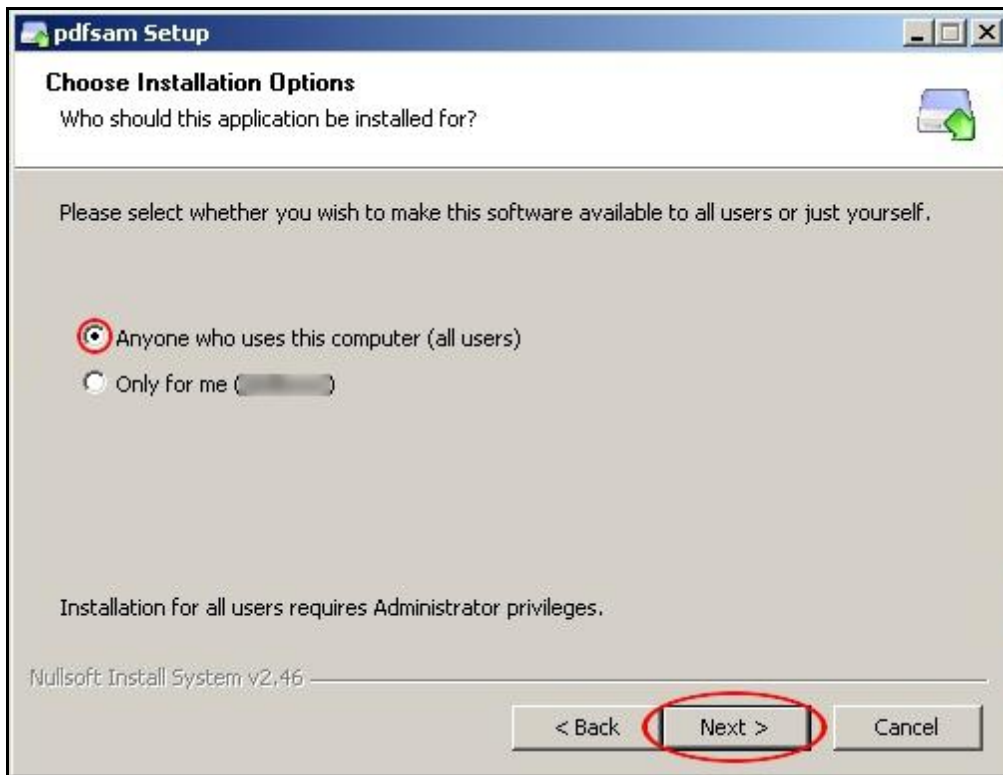
8) At the Setup Wizard introduction screen, click "Next".

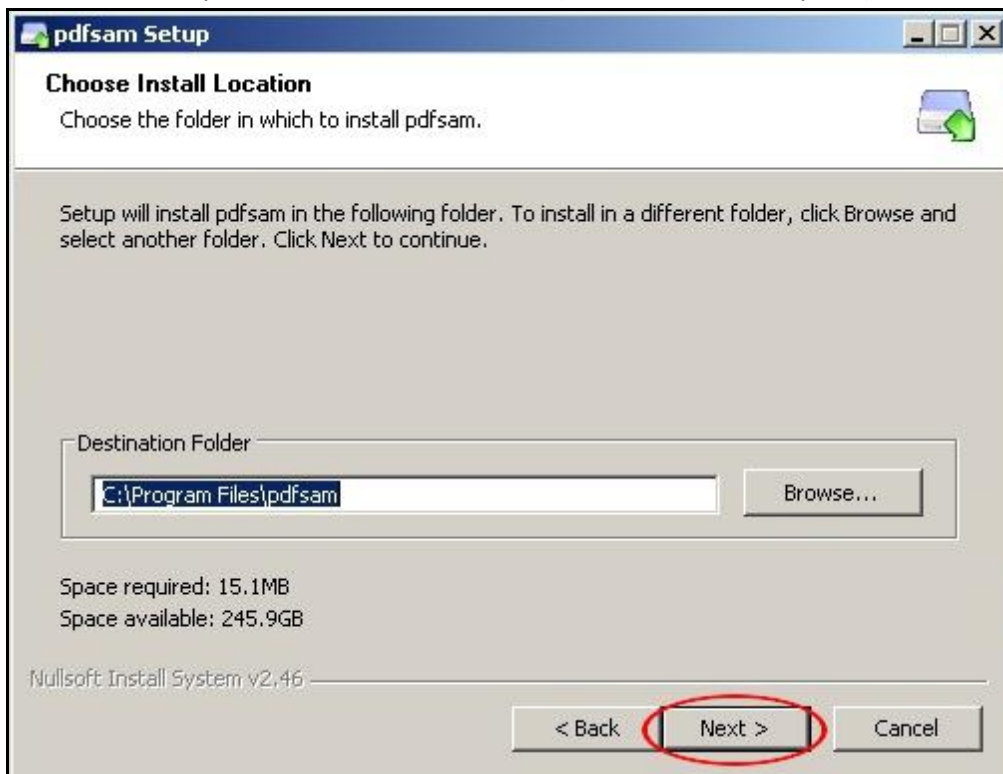9) Read the GNU GPL and click "I Agree" if you agree with the conditions for using the software.

10) If you would like other users of your computer to be able to use PDFsam, select the "Anyone who uses this computer (all users) radial button. If not, click "Only for me", and then click "Next".
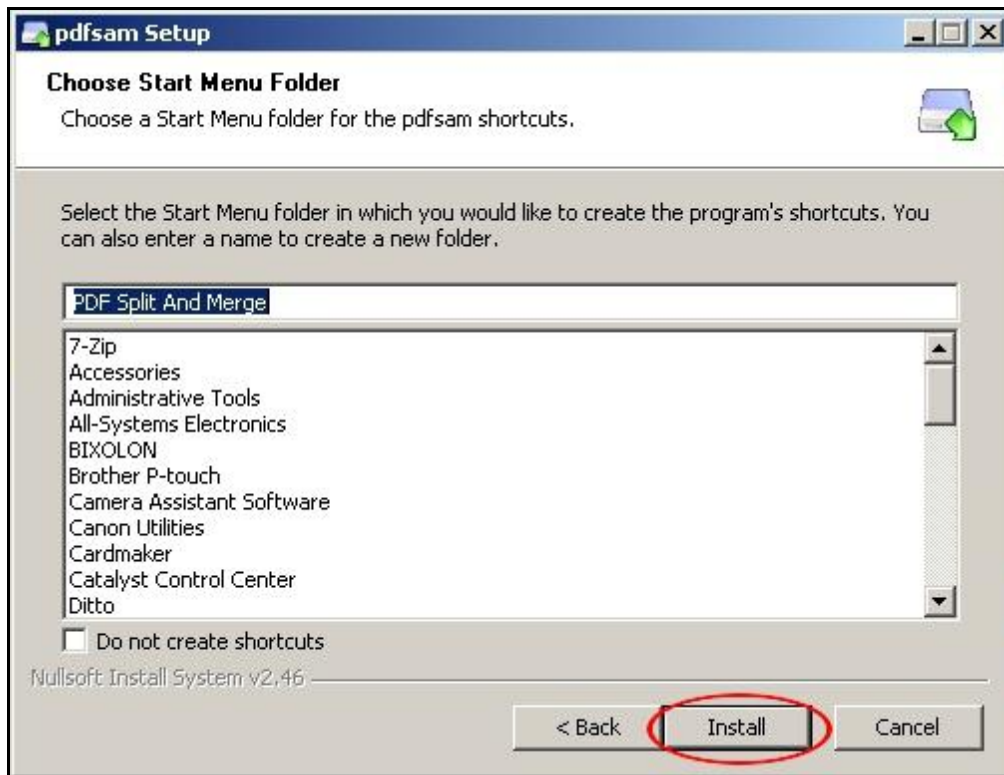

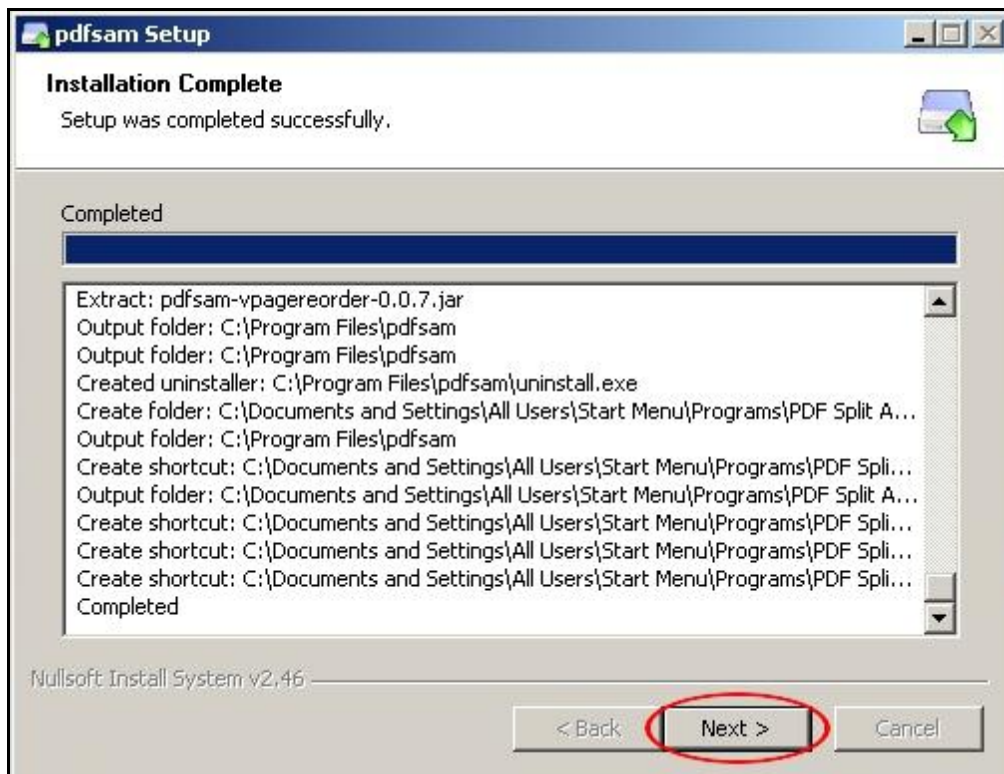11) Browse for the location you wish to install PDFsam at (the default is usually fine), then click "Next".

12) Click "Install" to install PDFsam. If you wish to change the Start Menu folder in which PDFsam is located (such as 'Accessories'), select that folder before clicking "Install".
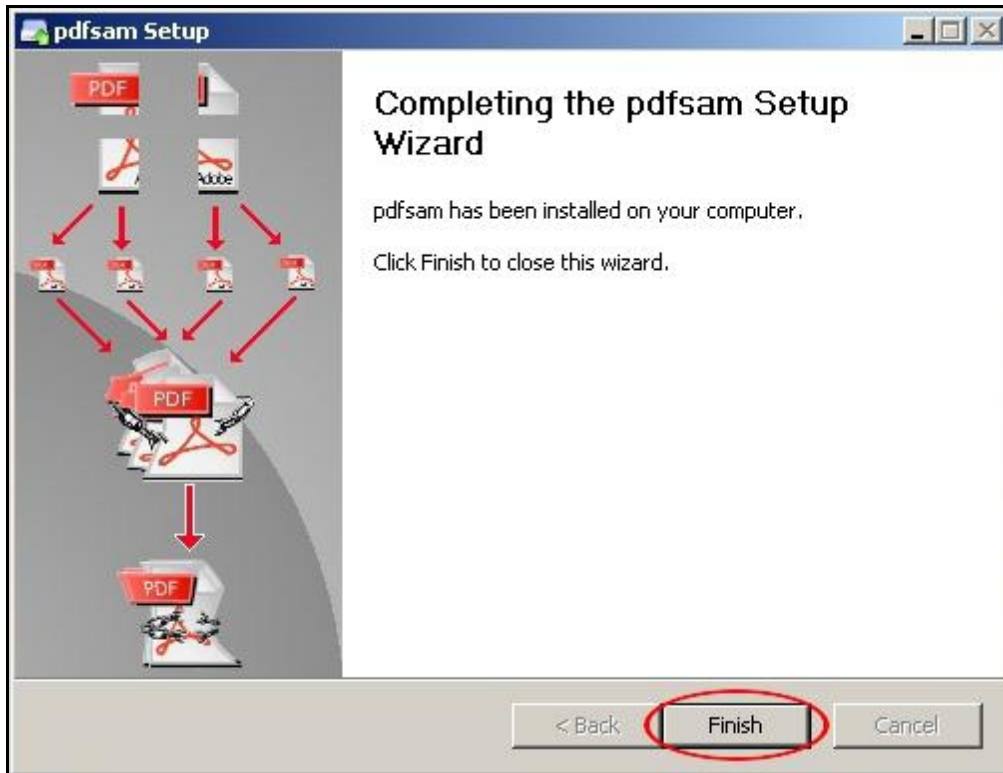

13) Once the installer has finished, click "Next".

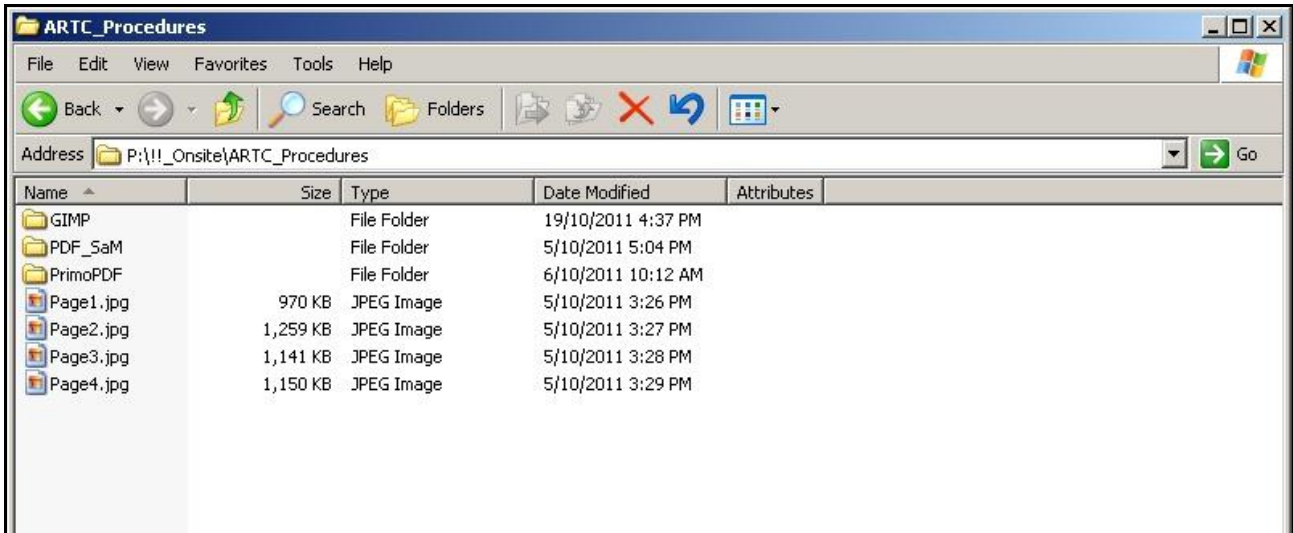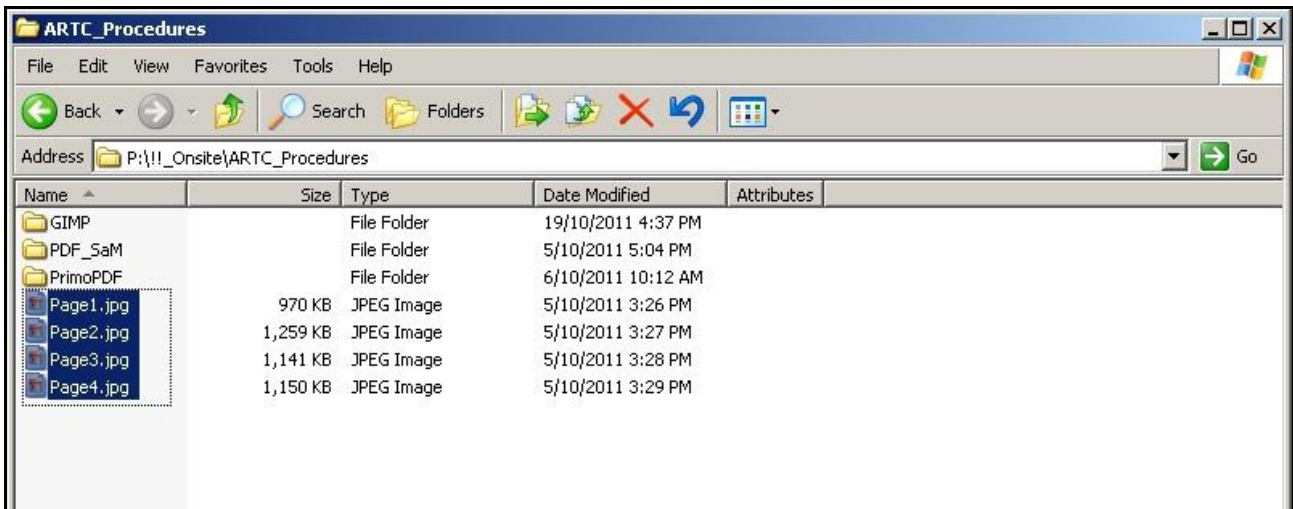14) Click "Finish" to complete the PDFsam installation procedure.

Using PrimoPDF

Converting Images to PDF

1) Navigate to the folder containing the file/s you wish to convert to a PDF document.
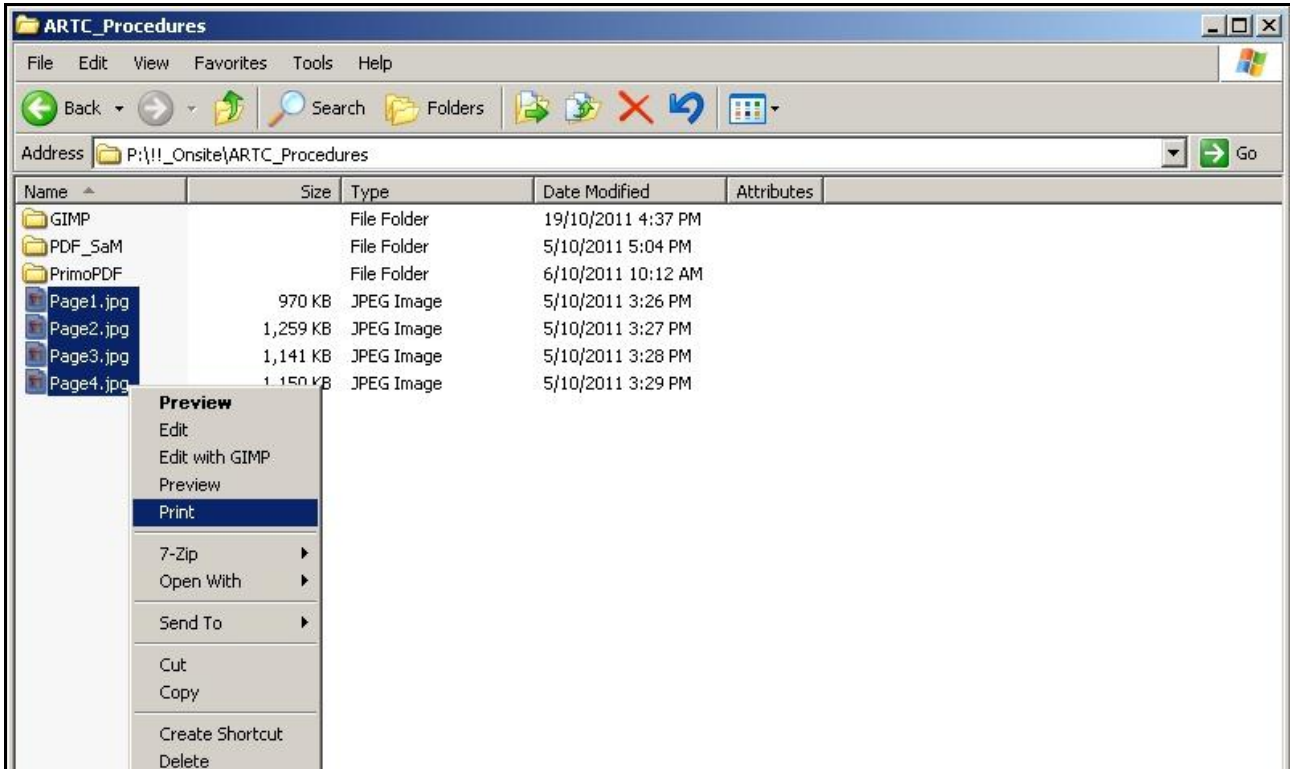

2) Select the required image files.
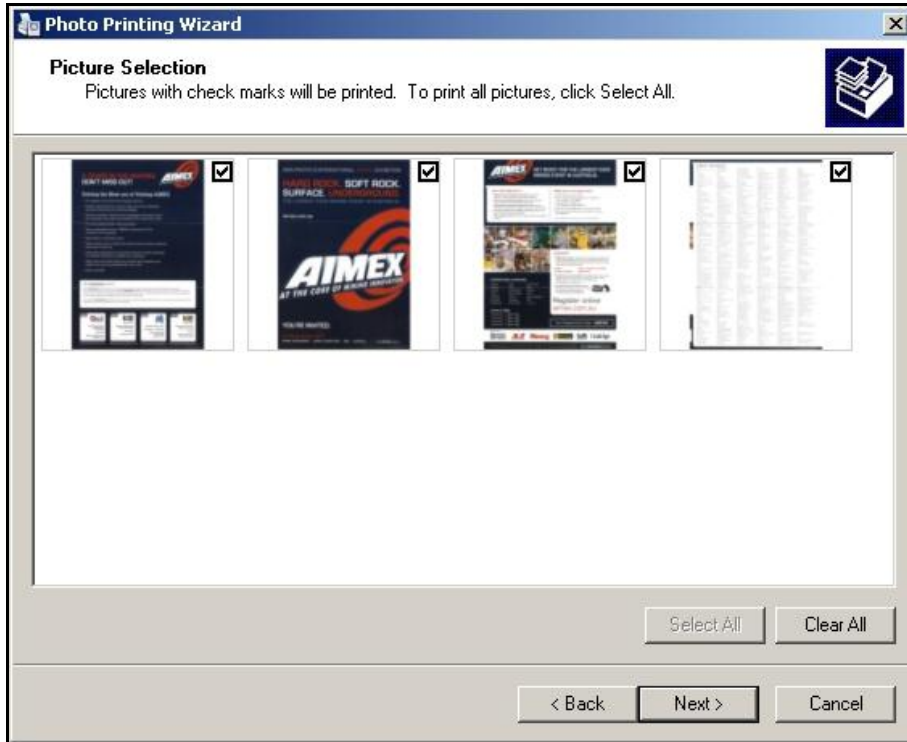
3) Right-click and select "Print".

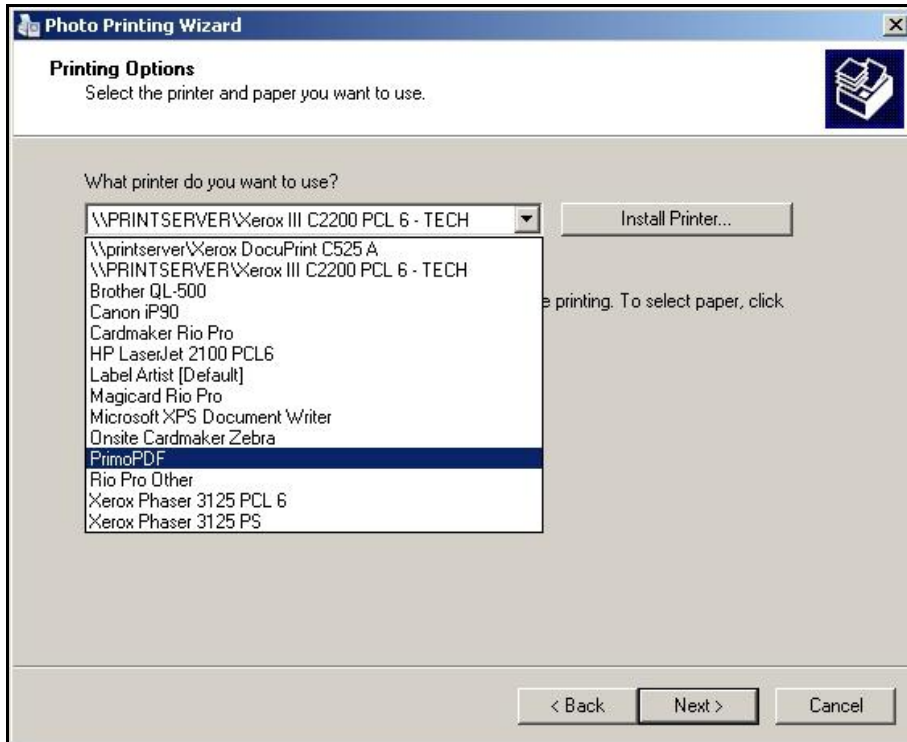4) Click "Next" on the Photo Printing Wizard welcome page.

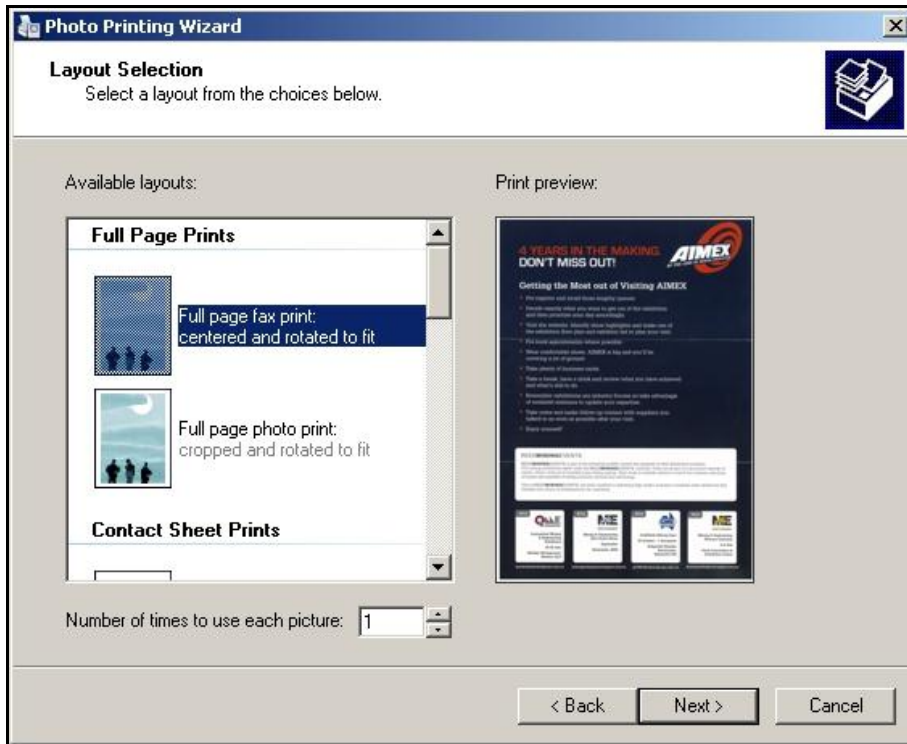5) Ensure the required image files are selected. Click "Next".

6) Select "PrimoPDF" .from the list of installed printers, then click "Next".

7) Select "Full page fax print: centred and rotated to fit" from the list of available. Click "Next".
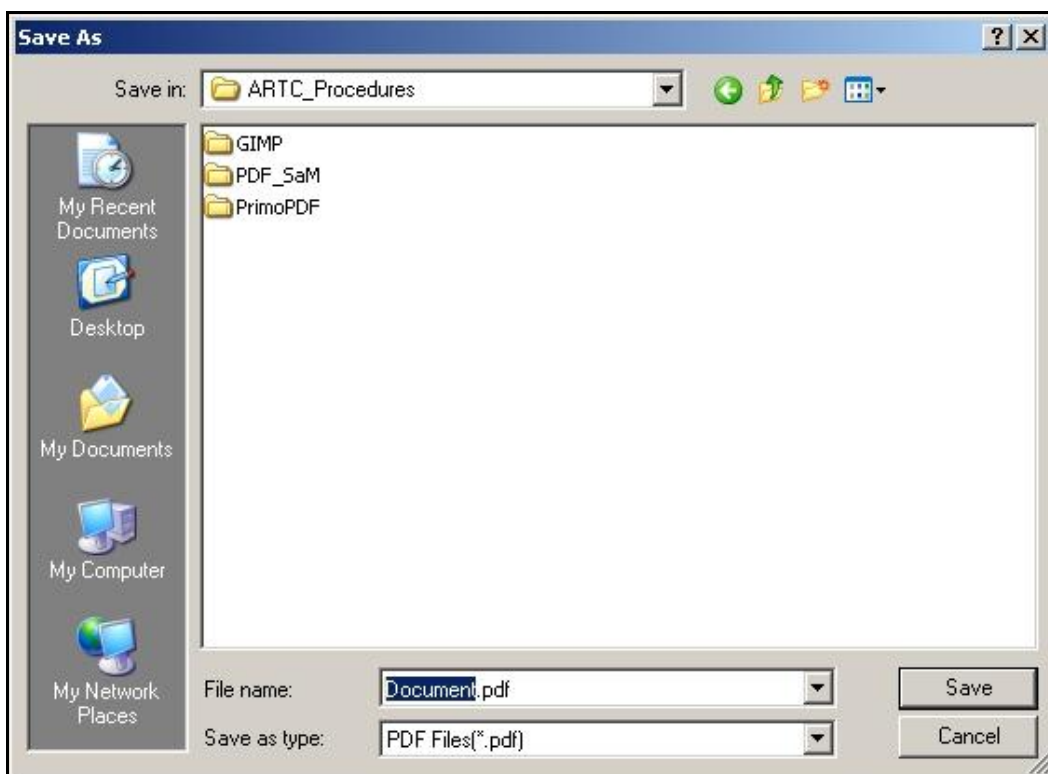

8) Click "Finish".

9) Once the PrimoPDF window appears, select "Screen" and click "Create PDF".
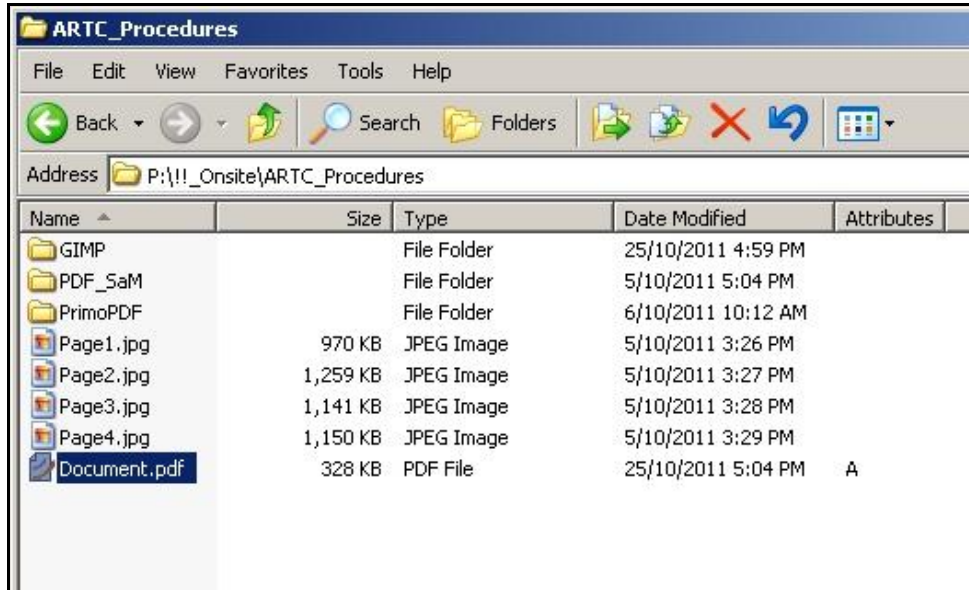

10) Navigate to the folder you wish to save the PDF to. Replace the default file name with one you choose, then click "Save".
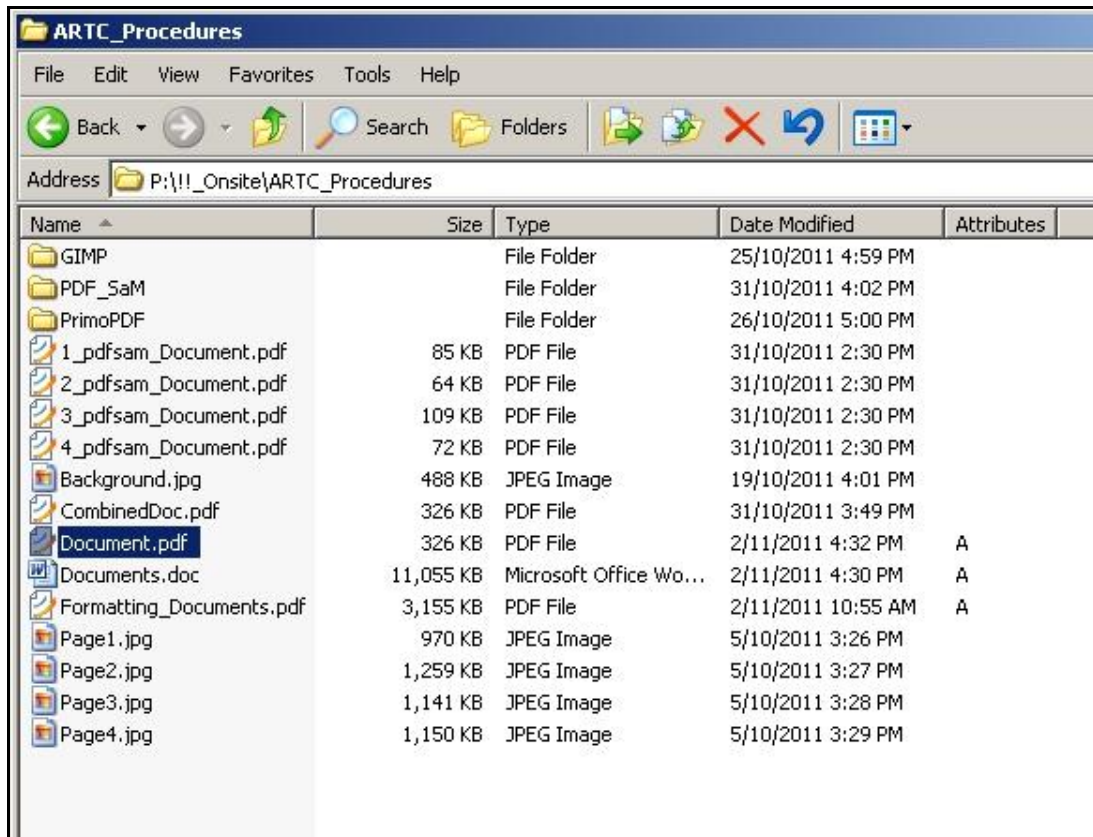
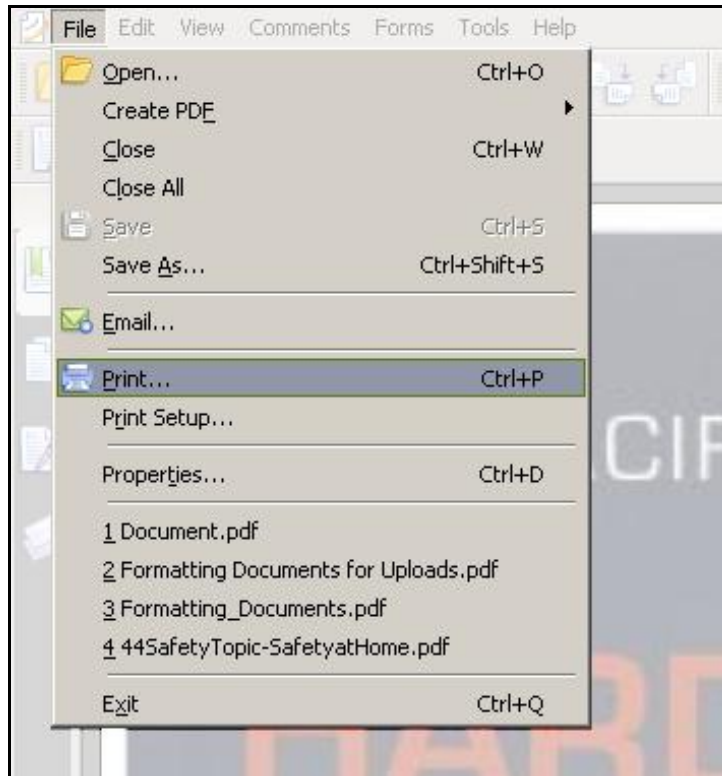11) The new document should be saved in the desired locations.

Converting Colour PDF documents to Greyscale

1) Navigate to the folder containing the file/s you wish to convert, and double-click to open with a PDF reader.
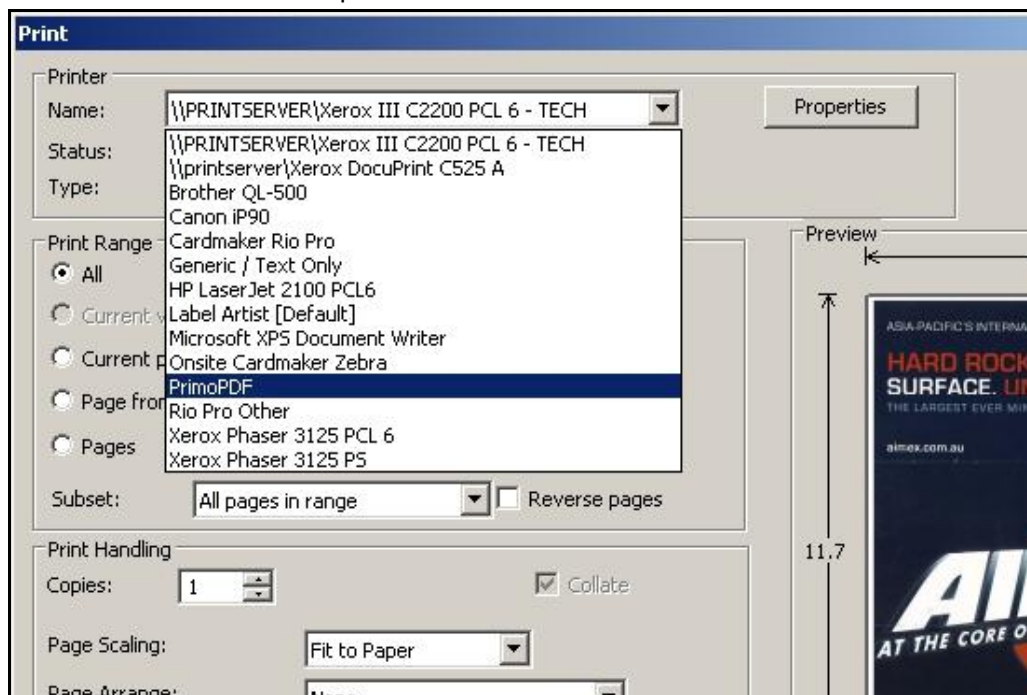
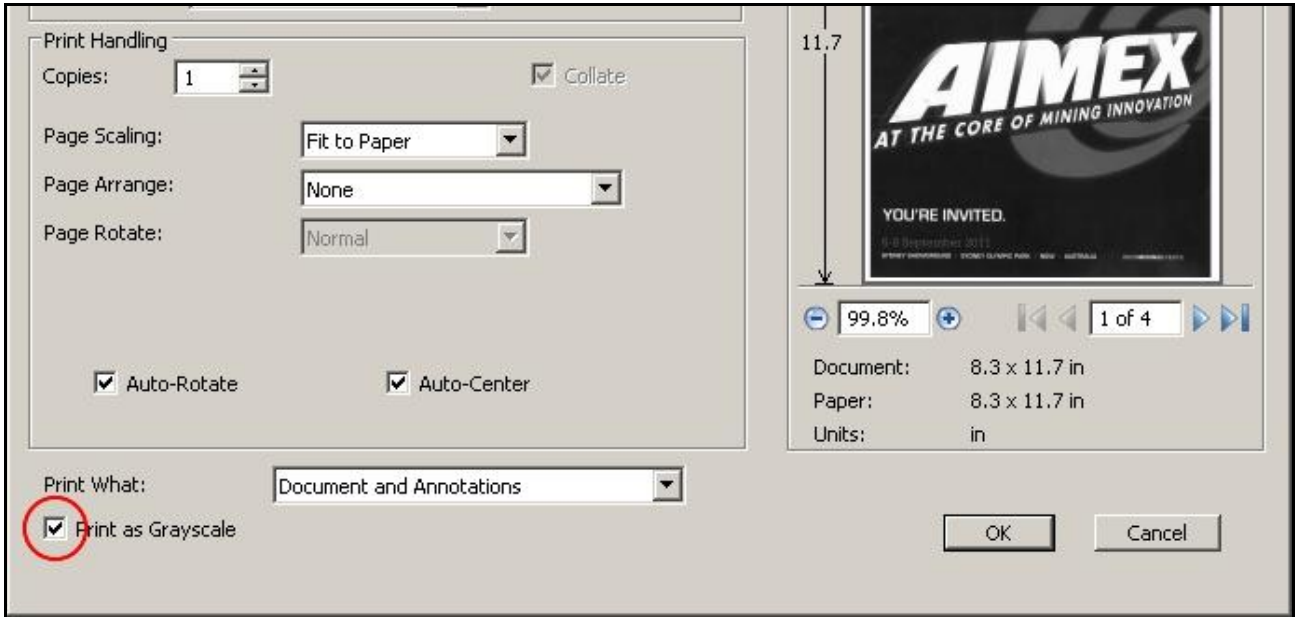2) Click "Print" in the File menu.
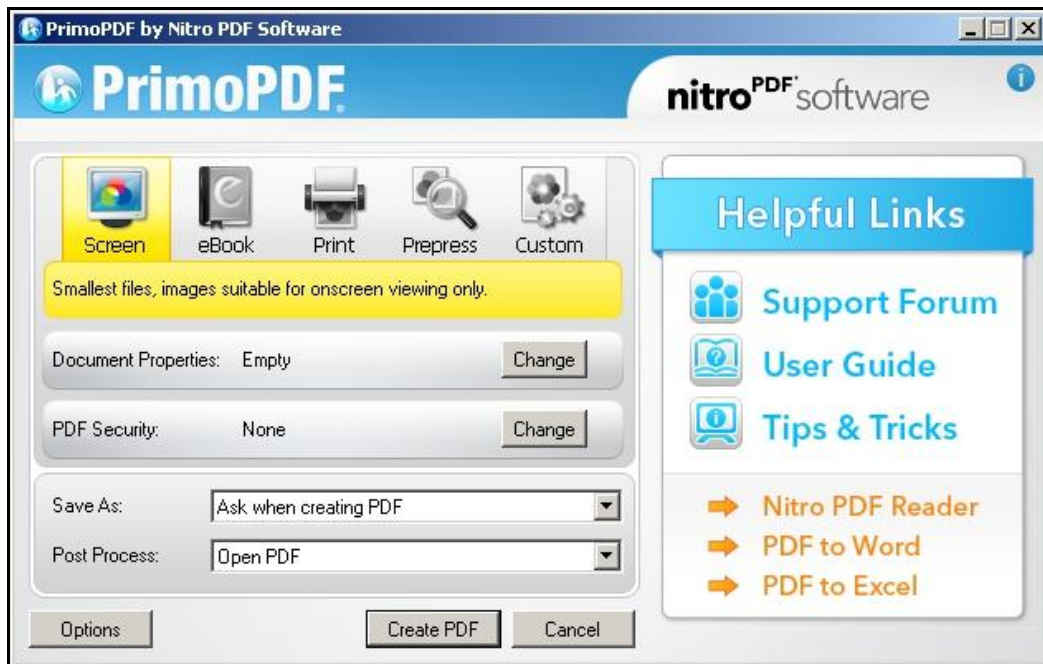

3) Select "PrimoPDF" from the list of printers.

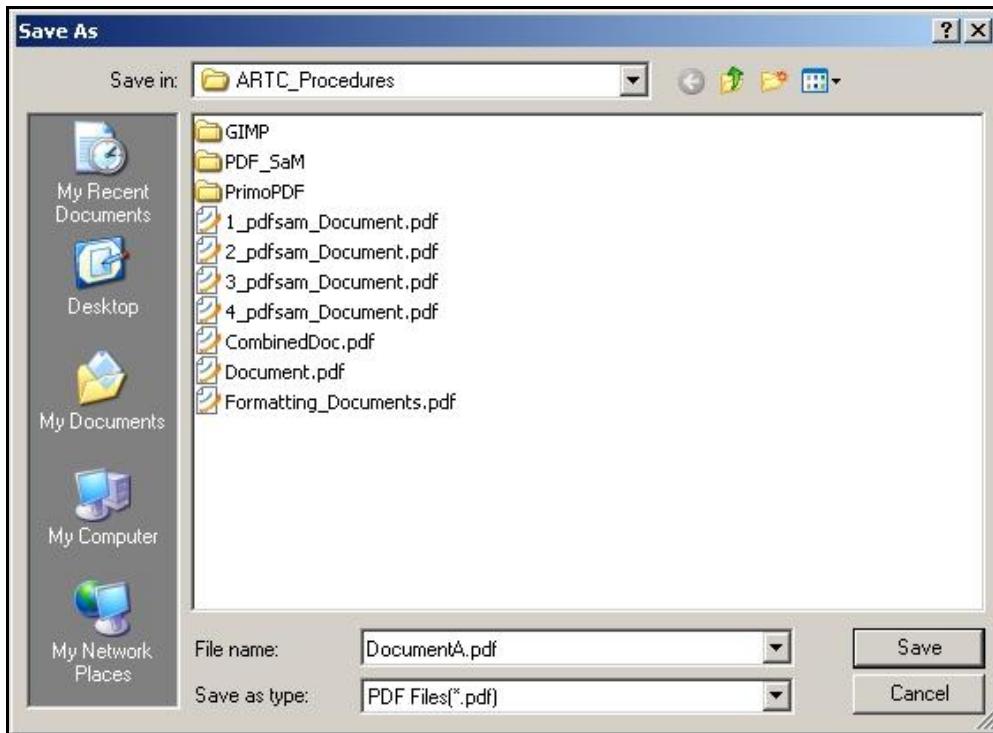4) Select "Print as Grayscale" at the bottom of the page, then click "OK".

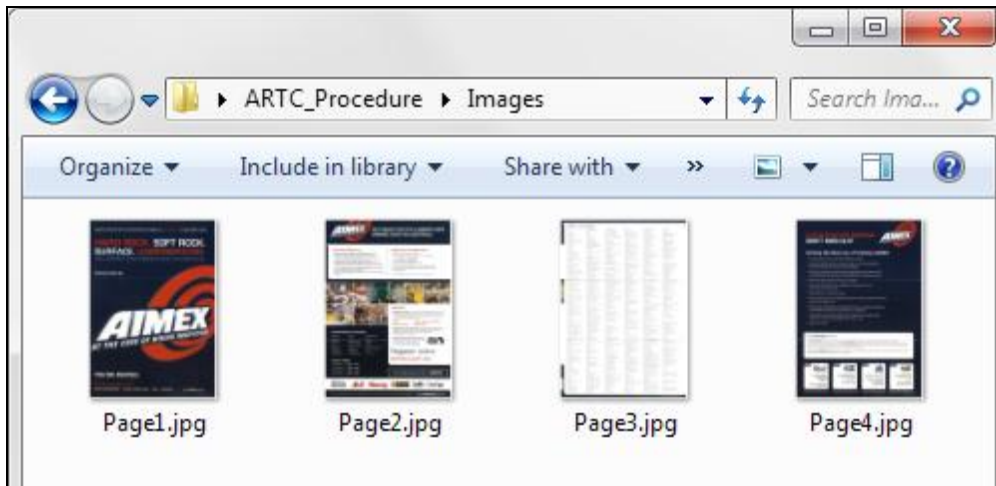5) When the PrimoPDF window appears, click "Create PDF".

6) Select the location you wish to save the greyscale document, enter the name you wish to save it as, and click "Save".
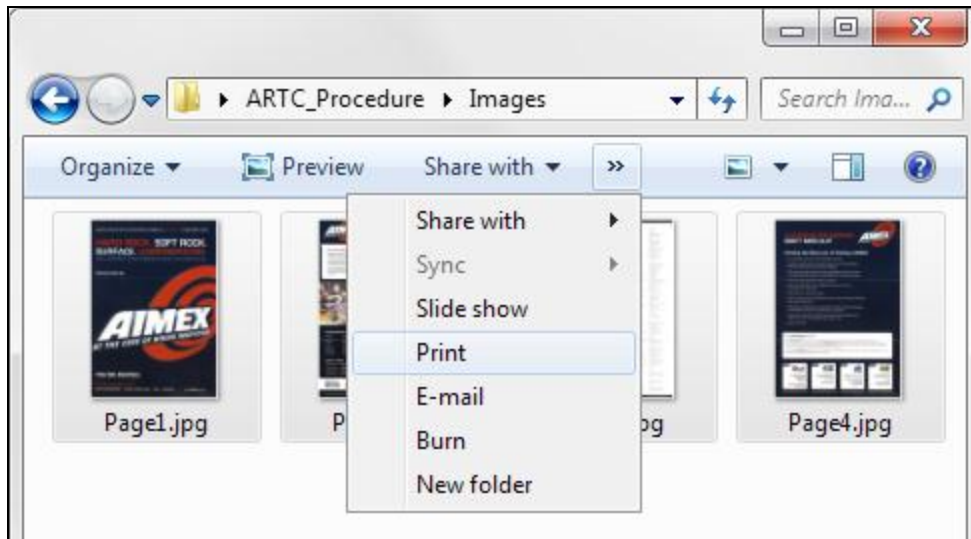

Using Windows 7

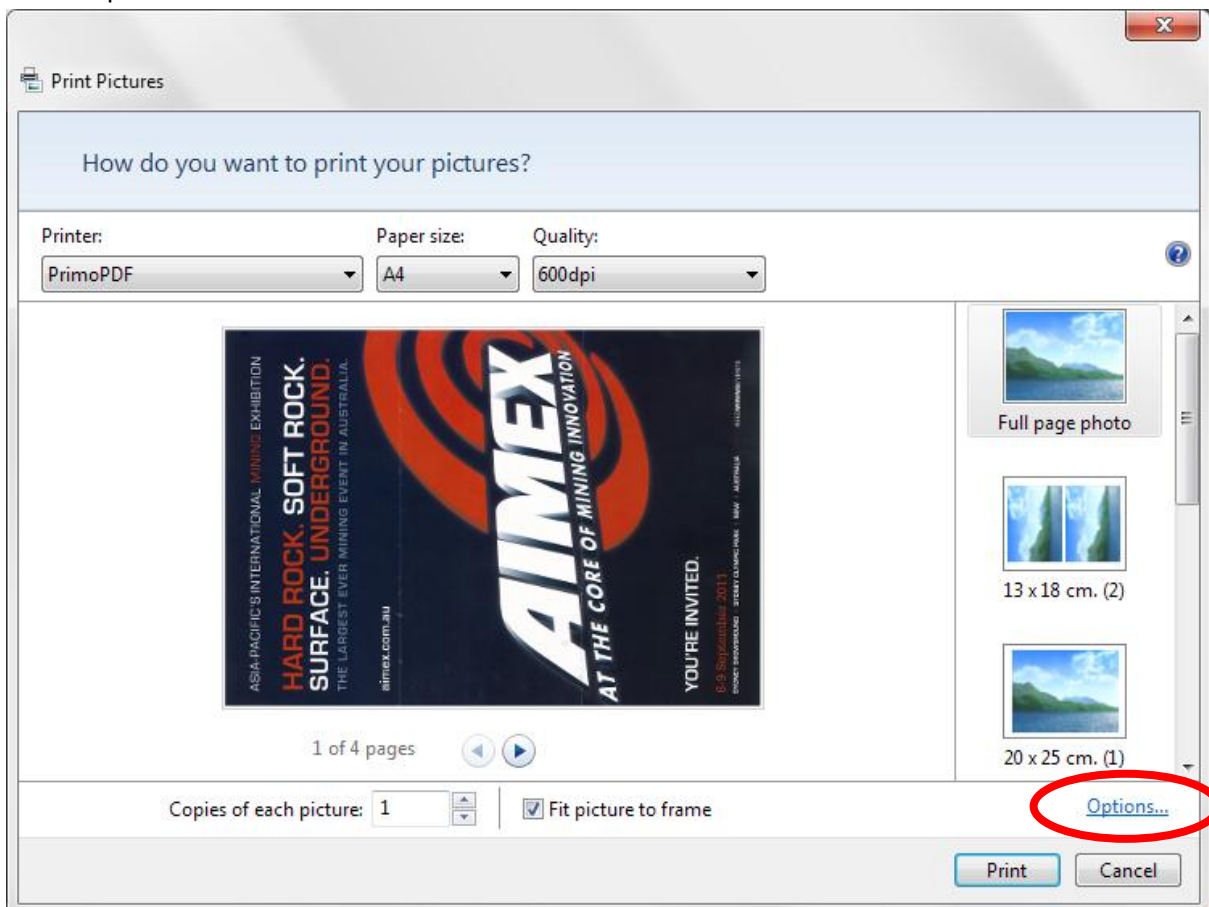1) Navigate to the folder containing the file/s you wish to convert to a PDF document.

2) Select the required image files and choose "Print" from the menu bar (you may have to click the >> to display the Print command).
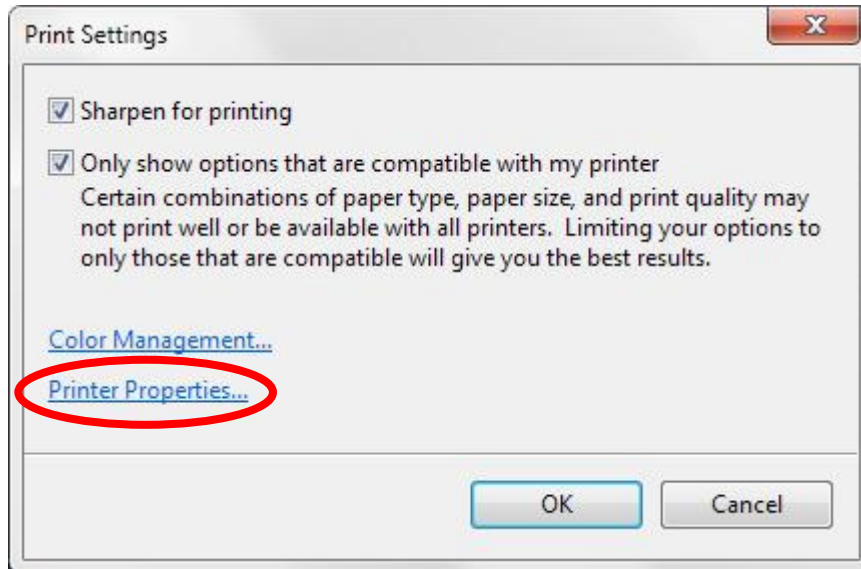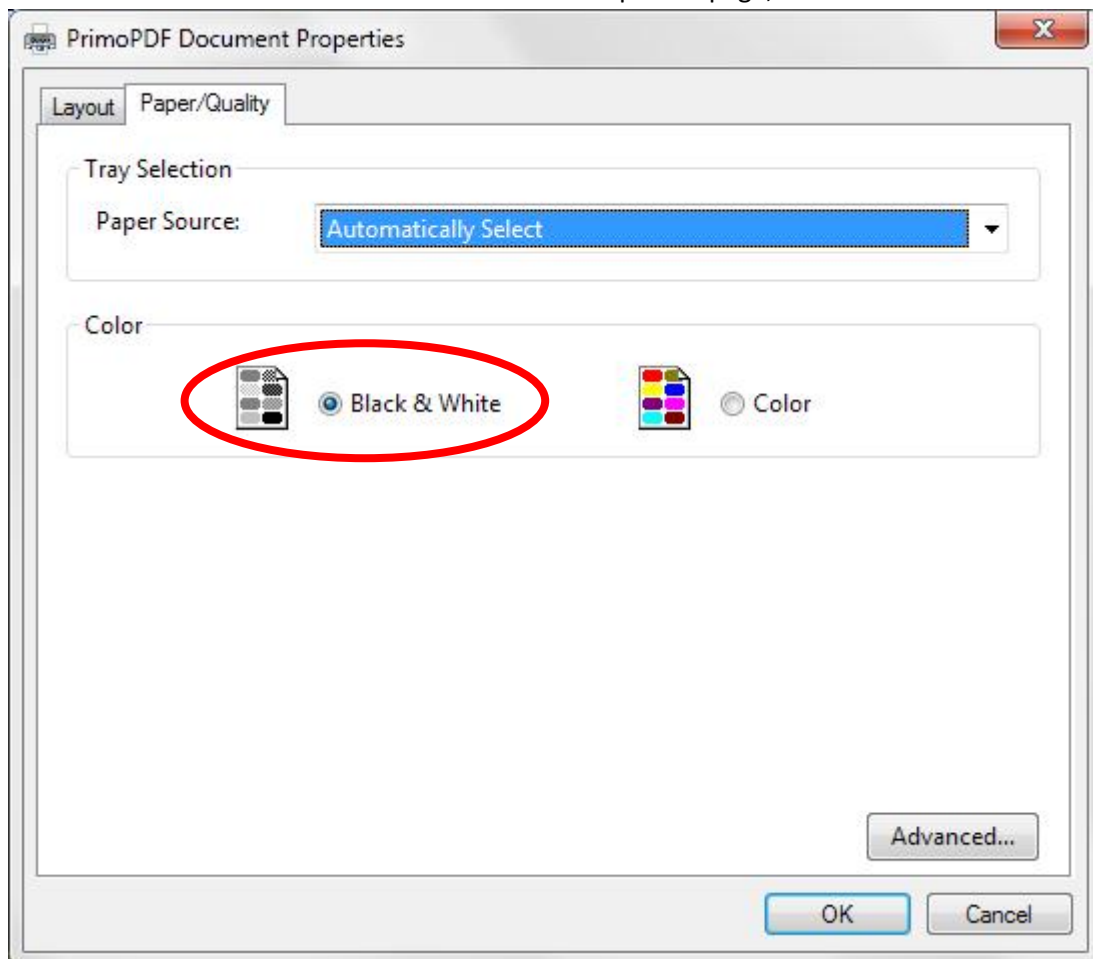

3) Click "Options" on the Print Pictures window.

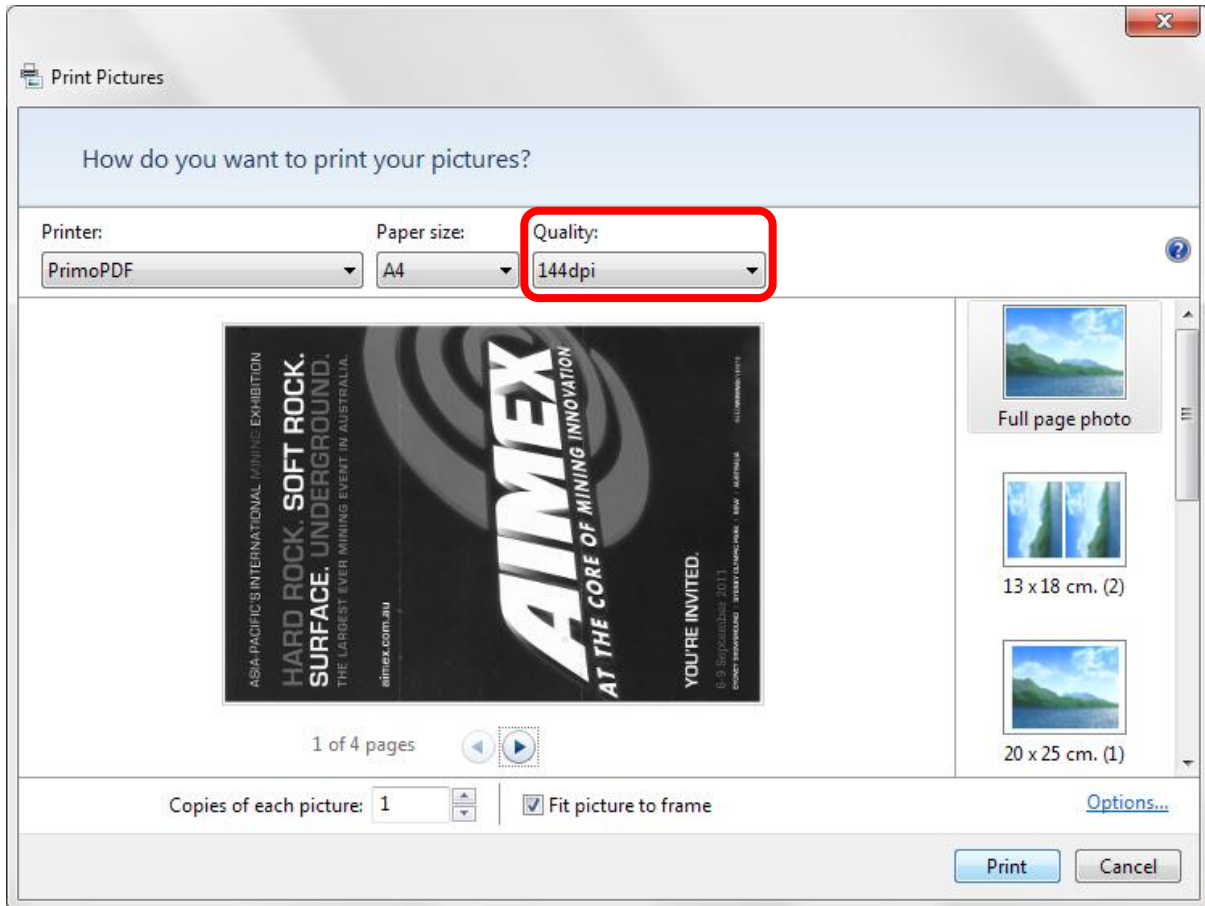4) Click "Printer Properties" on the Print Settings window.

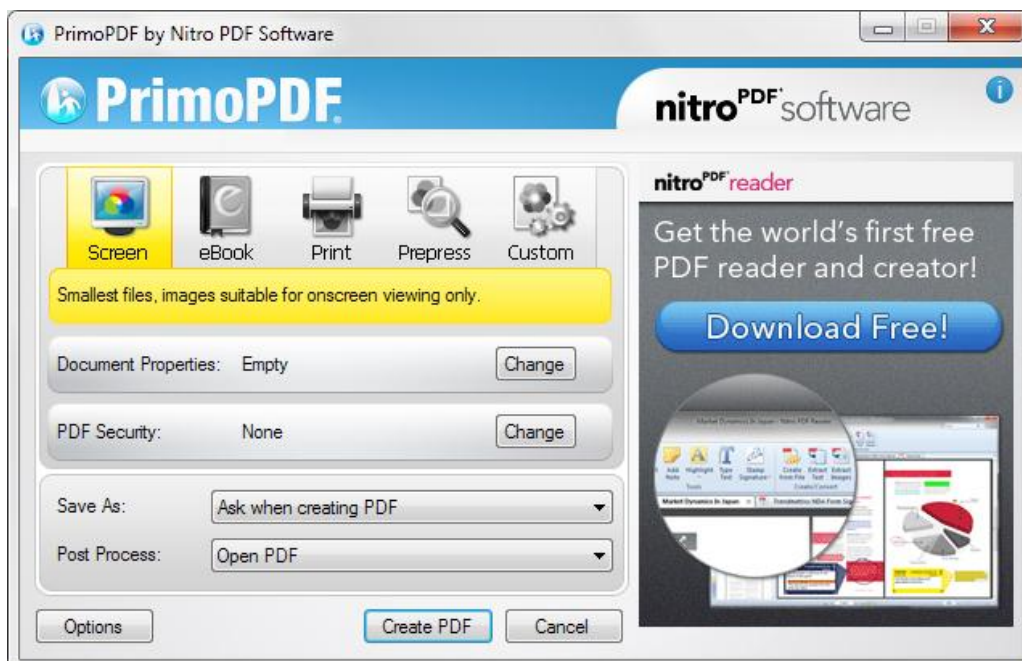5) Select "Black & White" on the PrimoPDF Document Properties page, then click "OK".

6) Reduce the quality using the pull-down menu (144dpi is OK for most documents) and click "Print".

7) Make sure "Screen" is selected and click "Create PDF". You'll then choose a folder and a filename for the new PDF document.
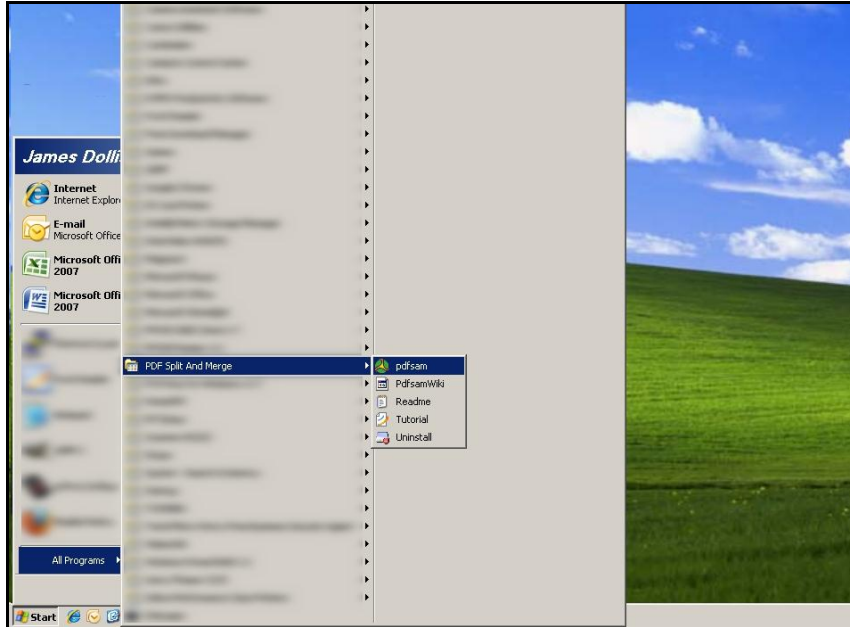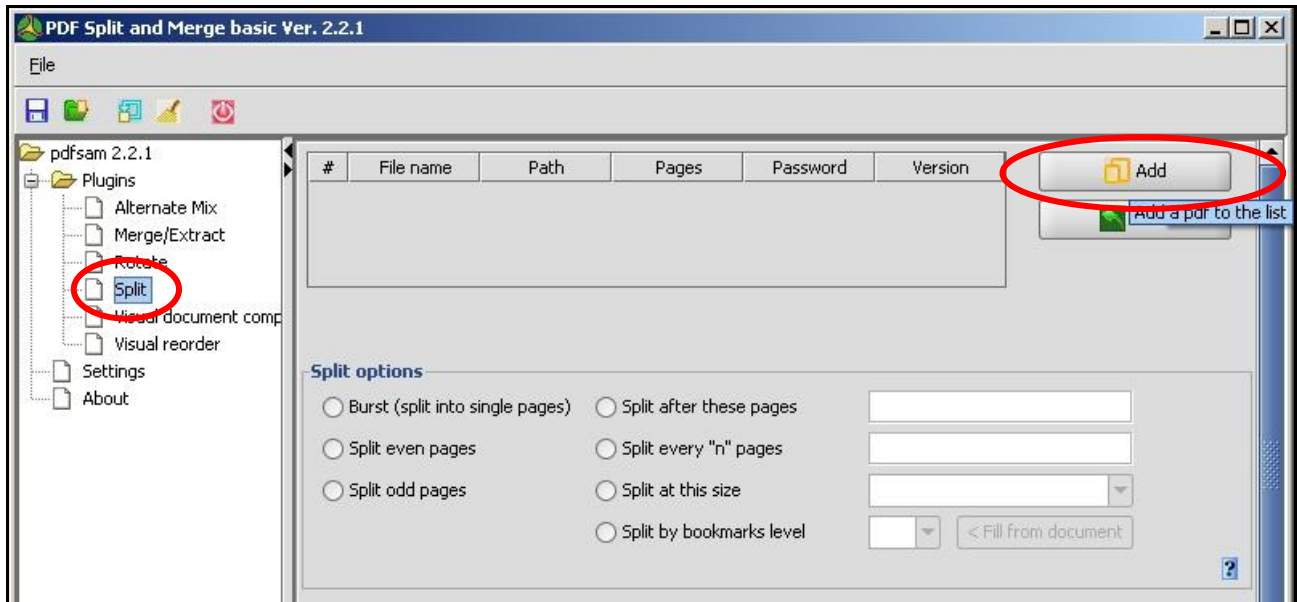
Splitting & combining PDF documents with PDFsam

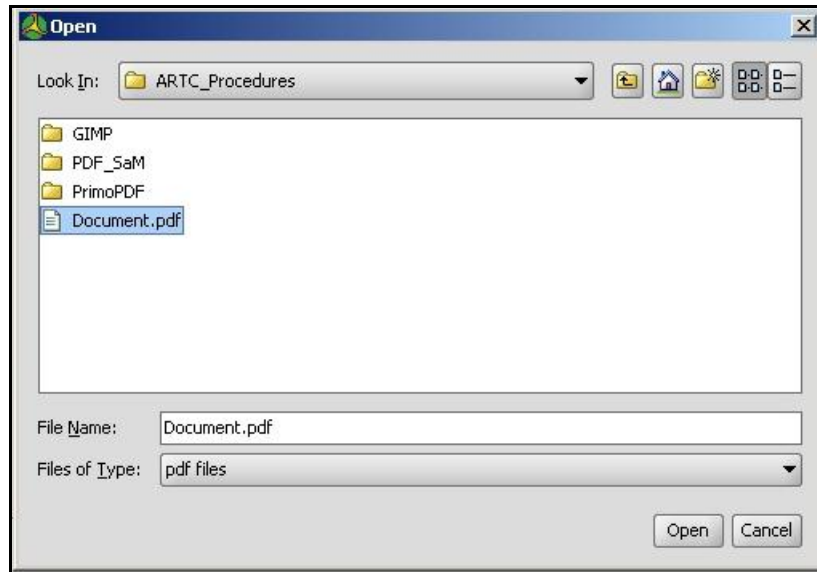## Splitting PDF documents

1) Launch PDFsam from the Start Menu.

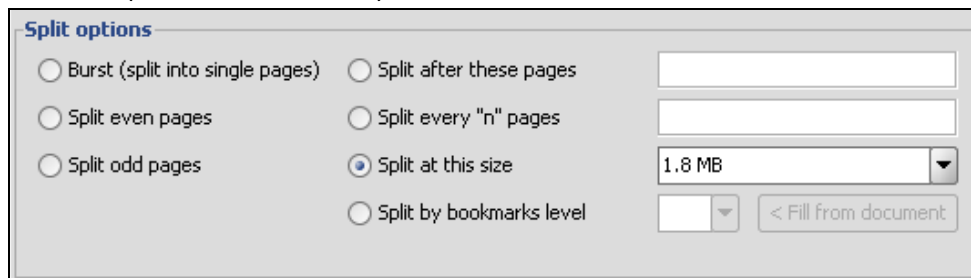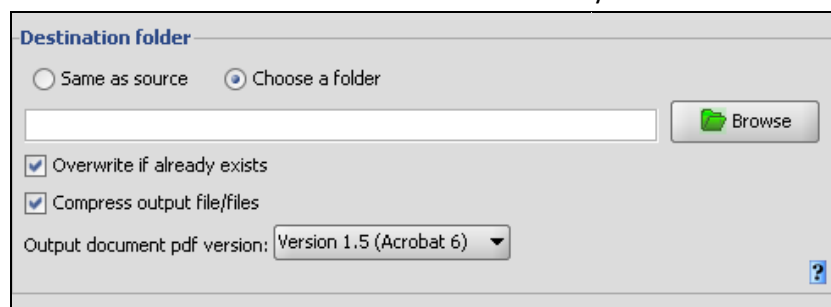2) Select "Split" from the left menu, then click "Add" in the work area.

3) Select the document you wish to split then click "Open".

4) Select the splitting option you wish to us. In the example below the document has been set to split at intervals of 1.8Mb (thus within the 2Mb).

5) Ensure "Choose a folder" is selected then browse for the folder you wish to save the split documents in.
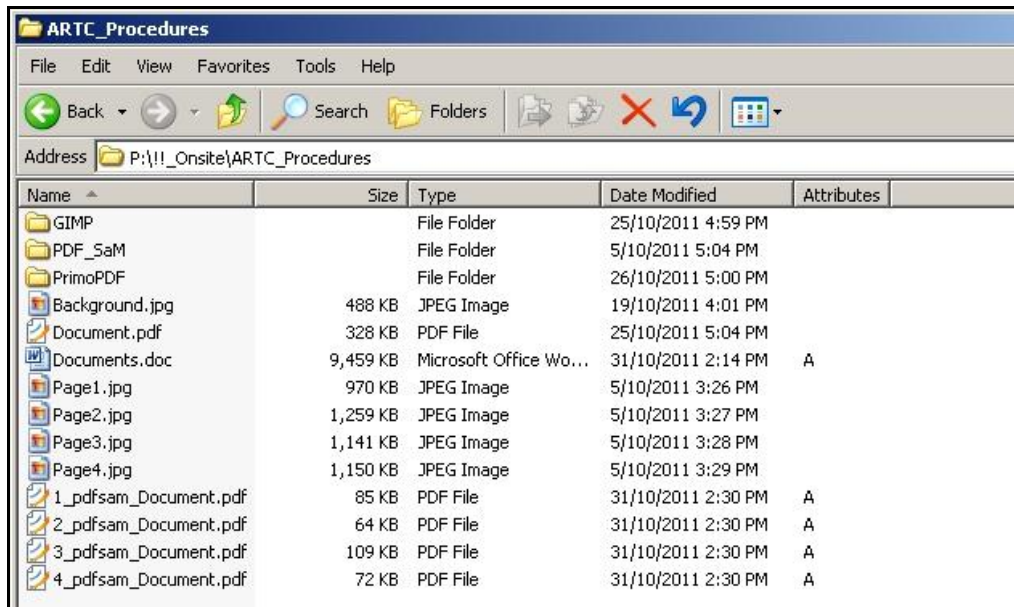

NOTE: "Overwrite if already exists" is selected by default, and (as implied) will overwrite the existing file.
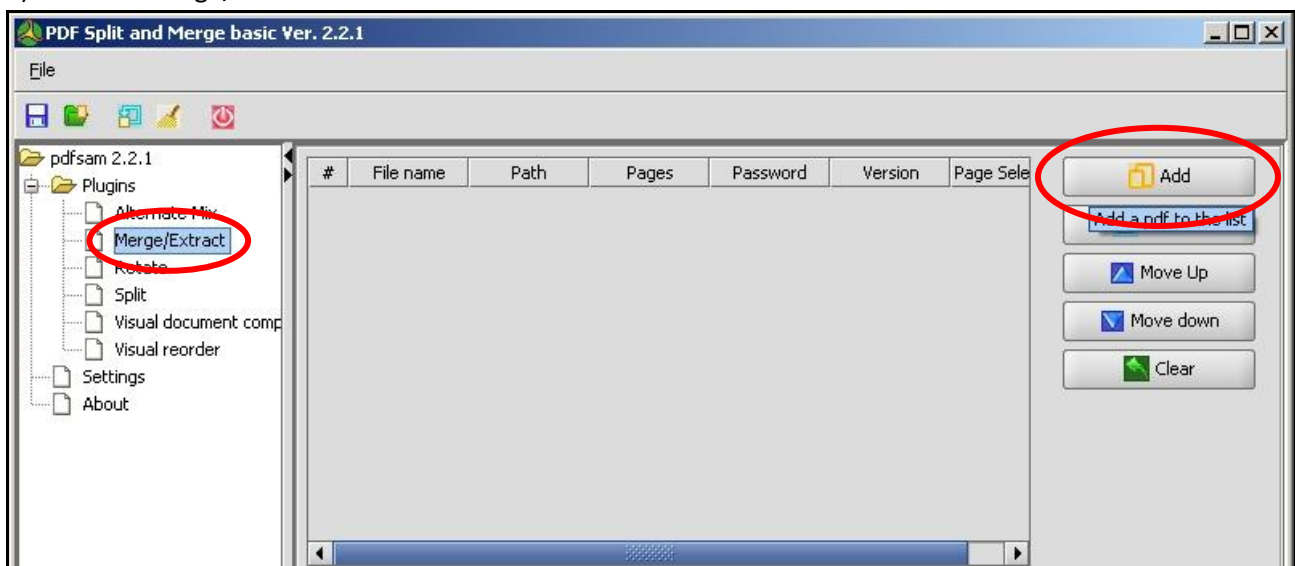
6) Click "Run" to split document.

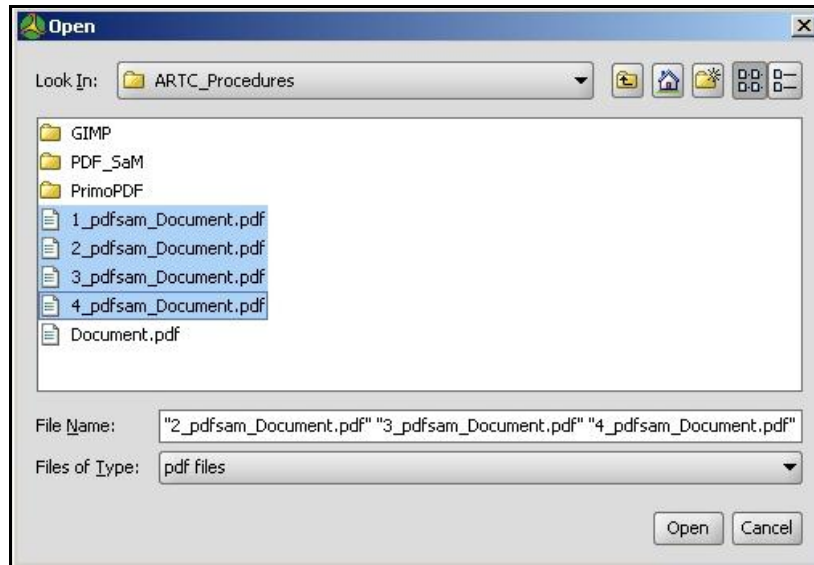7) The new files should be in the folder.

Merging PDF documents

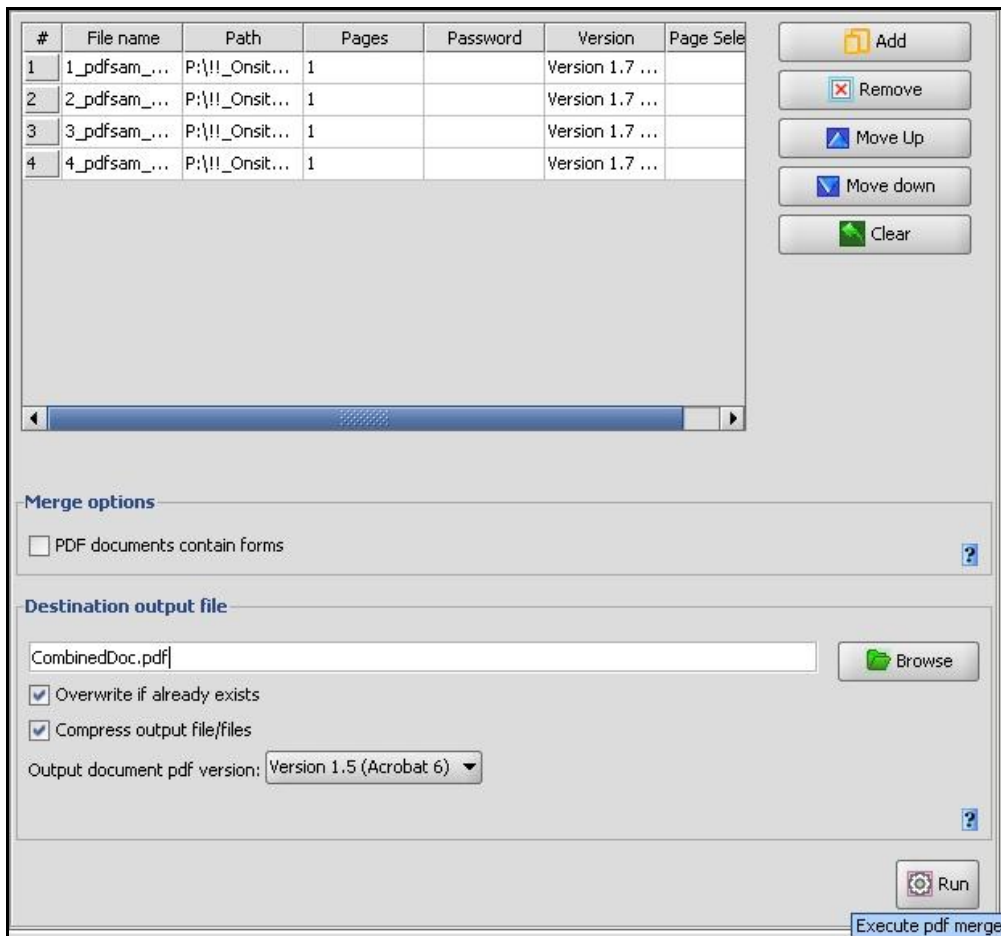1) Select "Merge/Extract" from the left menu then click "Add".

2) Select the PDF documents you wish to merge, then click "Open".

3) Browse for the folder in which you wish to save the merged document. Type the name for the new file, then click "Run".

NOTE: "Overwrite if already exists" is selected by default, and (as implied) will overwrite the existing file.

4) The new files should be in the folder specified in Step 4.