Print2Excel

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Version 1.0.5

This document outlines the functionality of the Print2Excel Printer.

Overview

Many users have the desire to export their printed documents to Microsoft Excel™ for further processing. Often times users express a wish that they could export a report to Microsoft Excel™ for further processing. This desire is addressed with Print2Excel.

The Print2Excel printer not only allows you to export the print out to Microsoft Excel™, it also offers sophisticated post-processing options making it easier for users to get the data they want from the reports into Excel™.

Basic Functionality

Print2Excel works as a printer driver on the users Microsoft Windows® system (virtual printer). This allows the user to export any report to Excel™ by printing to this virtual printer. For easy usage, the virtual printer has an algorithm that allows the user to place the different pieces of text and numbers on a report into appropriate cells after the export/print has been performed.

The printer driver runs on Windows 2000® and Windows XP®. The Excel™ version must be at least Office 2000® or newer.

Advanced functionality

To separate Print2Excel from other offers on the market, this product offers advanced post-processing features to minimize the user's effort in getting the data they want from the report.

Functionality	Description
Move to Top Left Cell	When this option is enabled, after the printing the whole Excel™ sheet will be moved to the top left corner (First cell with data in it) of the sheet, to prepare it for easy further processing.
Resize cells	When this option is enabled, after printing all cells will be resized to fit their data value.
Remove formatting of Cells	Will remove size, font, boldness, italic etc. from the Excel cells and reset it to Arial 12 pt. (or any

	font and size specified by the user).
Remove Data Section	This feature is a generic feature, which can be specified multiple times. It allows the user to exclude a data segment in the report from being exported to Excel™. It works by assigning keyword (A cell value to look for, i.e. a label called description), from this keyword the user can specify if the entire row or column should be excluded. The user can also get more specific by specifying it is only that cell or only that cell and the cell next/below/over it. Please see Appendix A for an example.
Remove Rows With Space	When selected, the exporter will compress the data so no blank rows exist in the Excel™ Sheet.
Remove Columns with Space	When selected, the exporter will compress the data so no blank columns exist in the Excel™ Sheet.
Date format	Ability to specify what date format the Excel™ printer should use for cells with a date in it.
Number format	Same as date format for integers and decimals found.

Profiles

Print2Excel offers a set of advanced feature settings specified by the user as the default settings for all new documents printed by the driver. Print2Excel also offers the user the ability to establish profiles.

A Profile is a set of advanced feature settings that fit a particular report/document that the user is printing. This enables the user to create a set of settings that fit a particular report to make that particular report useful right after it has been printed.

Limitations

Print2Excel will attempt with best efforts to align the columns in the printout correctly. However, sometimes there are layouts in printouts that are difficult to interpret which in turn may require the user to affect minor modifications to the final result to get the desired format of the Excel™ spreadsheet.

HOW TO USE PRINT2EXCEL

Install Print2Excel Driver: New Users
1. Proceed to Print2Excel website to download…www.print2excel.com
2. Click on the Download Button
3. If you are a new user the click on <u>New users - click here to download version x.x.x</u>
4. Next Click on the Save Button
5. Select a new location to Save the file and click Save
6. Locate file and unzip the file
7. Double Click on the Print2ExcelSetup.zip to extract. Select all files and follow the extraction instructions
8. Now locate the Print2ExcelSetup.exe icon and double click to launch the installation
9. Follow the wizard and answer all questions
    this process could take several minutes
10. When complete a license information screen will appear
    a. OK Button—will allow you to run Print2Excel on a trial basis
    b. Purchase Button—will direct you to the Print2Excel website to register and purchase the product
    c. Register Button—will provide you with product key. Copy this product key into an email or contact Simcrest to retrieve a license key if you have already purchased the product
        i. Enter in the license key and click the unlock button. You will receive a message if successful
11. Proceed to Selecting the Print2Excel Driver section

Install Print2Excel Driver: Current Users needing patch fix
12. Proceed to Print2Excel website to download…www.print2excel.com
13. Click on the download Header
14. Next click on the <u>Users with Version x.x.x installed-click here for upgrade patch</u> link
15. Click Save on the pop up menu to save the patch
16. Select a new location to save the patch
17. Locate and open Print2ExcelPatch zip file to extract
18. To load patch locate and click on the Print2ExcelPatch.exe (patches may include a version #)
19. Click Run
20. Click Ok to confirm that patch has run successfully

Selecting the Print2Excel Driver: when ready to print

1. Locate a report or document that you would like to print to Excel
2. Next to print click File and select Print
3. The print dialogue box will appear
4. Click on the Printer Name drop down and select the Print2Excel Print Driver
5. Then click OK
6. You will receive a Message about printable area. Click YES to continue

   Note: System will take a few seconds to generate the report into excel. Larger reports will take longer

7. Now the Print2Excel Print Driver Properties box will appear

Add New Profiles:

8. To add new Profiles click on the Options button
9. Select Add Profile
10. Enter in a new Profile Name. Profile names could be the name of the report you are converting to Excel
11. Set up various parameters for the specific report
    a. By default various parameters are automatically set. To remove those preset parameters click on the check marks to uncheck
    b. To Remove Formatting of Cells—click on the Remove Formatting of Cells check box and enter in the various parameters that will be removed
    c. To Remove Sections—click on the Remove Sections check box (See Appendix A)
       i. Then click on the Section Type drop down and select an actio
       ii. In the Section Keyword field type in EXACTLY what is located in that cell (if the entry is not exact then the previously selected action will not occur)
12. When complete click the OK button below the Profile Name
13. Next select a location to which the Spreadsheet will be saved to
14. Enter in a File name and click Save
15. The system will then convert the report to Excel and open when complete

   When reprinting or when re-running a report at a different time, you will not have to re-enter or select a profile. The system will automatically know based on what was initially entered.

Adjust Properties on Profile:

1. Click on your START button
2. Select Programs
3. Then click on Print2Excel folder
4. Select the Print2Excel
5. The Properties dialogue box should appear
6. Click on the Profile Name drop down and select the Profile to edit
7. Click Option and select Show Advanced Options
8. Make the necessary modification to the profile
9. When complete Click Ok to save the changes

The profile will automatically make the necessary adjustments to the report when it is ran in the future.

Appendix A

Normal Excel™ Sheet After Printing:

Order No.	1154				
	Description	Qty.	Item no.	Unit Price	Total
	Hammer	2	123-56	5.00	10.00
	Nails	100	45	0.10	10.00
Total					20.00
Order No.	1155				
	Description	Qty.	Item no.	Unit Price	Total
	Hammer	5	123-56	5.00	25.00
	Nails	200	45	0.10	20.00
Total					45.00

The Following Profile settings:
Anchor: Order No., Action: Remove Row
Anchor: Description, Action Remove Row
Anchor: Total, Action: Remove Row
Remove Rows With Space = Yes

Print With Profile Settings:

	Hammer	2	123-56	5.00	10.00
	Nails	100	45	0.10	10.00
	Hammer	5	123-56	5.00	25.00
	Nails	200	45	0.10	20.00