

Creating the PDF report

You can use the **Create PDF** option to produce a PDF file which contains the reports, workpapers and linked documents from the workpaper period for the client. The PDF report can be printed for review or saved to your own system as a record.

Associated reports, workpapers and linked documents of the workpaper period are grouped under the relevant headings in the **Create PDF** window. By default all are selected.

The **Linked Documents** section includes a list of all unique external files (and the directory path) and Document Manager files that have been linked to the actual workpaper or to the period. The following document types are supported when creating a PDF report:

- Adobe Acrobat (.pdf) up to 100 MB
- Microsoft Excel (.xls, .xlsx, .xlsb, .xltx, .xltm, .xlsm or .csv, including files with macros) up to 40 MB
- Microsoft Outlook (.msg)
- Microsoft Word (.doc or .docx) up to 40 MB

You can select unsupported file types in the Create PDF process, to include a complete list of documents in your reports.

Attempting to link documents that exceed the size limits may result in poor system performance.

If a Microsoft Excel file is included, the print area must be previously defined within the document. If no print area is set then the Excel file is used as it is. All sheets within a workbook will be included as part of the whole document.

The Create PDF option will include any documents that you linked to workpaper templates without using the **Document link** table in MYOB's standard templates. The linked documents are included in the PDF generated, or in the list of exclusions. A document is only added once to the **Linked Document** list if:

- The same document has been linked to multiple workpapers.
- Different bookmarked sections of the same document have been linked to multiple workpapers or to the one workpaper.
- The same document is referenced with different workpaper names.
- The same document is located in only one location.

If the same document is stored in different locations and referenced from each of these locations, then two documents will be displayed in the **Linked Document** list.

If a document link is broken (i.e., by renaming the document or moving it to a different location), the document is included in the Linked Document list but an error message will be displayed. You must re-link the document.

If any documents aren't converted when using the Create PDF process, you can see a list of unconverted documents in the **Documents not converted to PDF** report.

A PDF viewer must be installed for the report to be created. If a PDF viewer is not installed, an error is displayed.

To create a PDF copy

If you were using Document Manager and have since decided not to use Document Manager any more, then you will not be able to print any linked Document Manager files as Document Manager will not be available to extract the documents from the database.

You need Document Manager installed if you want to import PDF reports into Document Manager. The **Share It** button is only available if Document Manager is installed.

To import PDF report into Document Manager

Related topics

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[Managing, tracking and approving workpapers](#)

[Adding a new adjustment journal](#)