

Report Generator: Converting Documents to PDF

Report Generator enables you to easily and efficiently create client-approved reports. Within Report Generator, you can upload documents (such as Morningstar fact sheets, advisor newsletters, and client-approved research documents) and add them to reports and report packages. These uploaded documents are referred to as supplemental content, and they must be in PDF format before you can upload them to the Supplemental Content library. This document provides instructions for converting different types of documents to PDF.

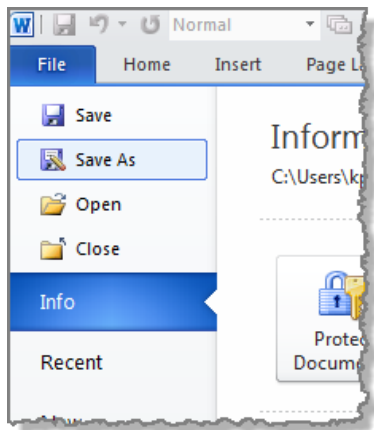
Note: For information about supplemental content, see the [Report Generator: Supplemental Content Quick Reference Guide](#).

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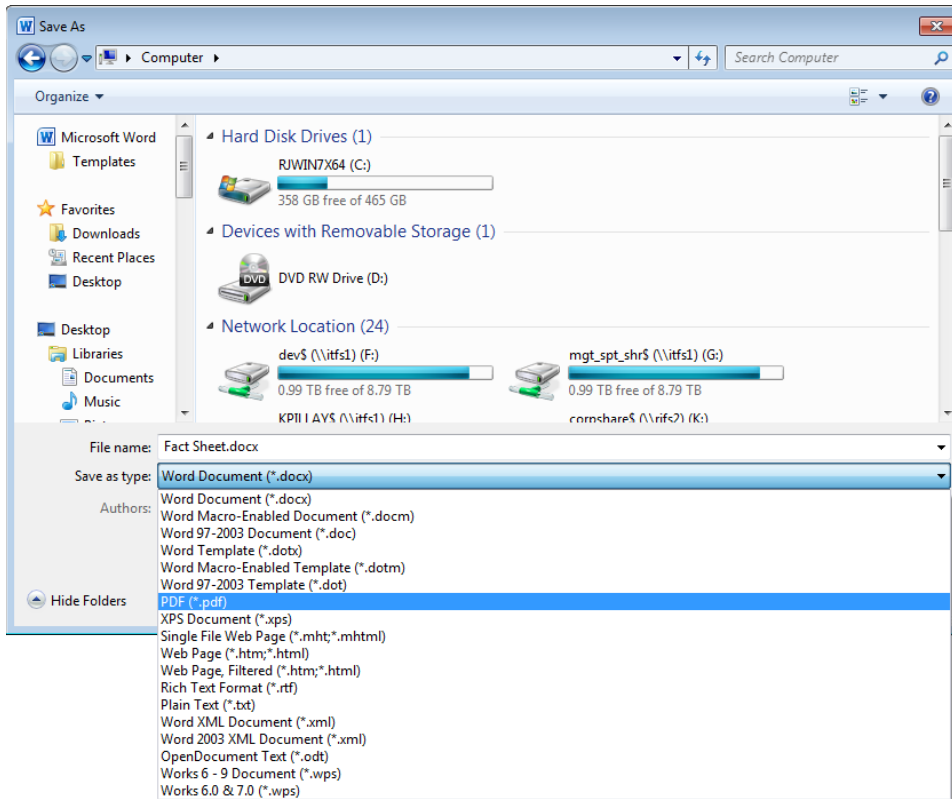
You can convert different types Microsoft Office files to PDF format. The steps below are for converting a Word document to PDF; the steps for converting an Excel spreadsheet and a PowerPoint presentation are very similar.

To convert a Word document to PDF:

1. Open the Word document.
2. Click the **File** ribbon, and select **Save As**.



The Save As window appears.



3. Browse to the desired location.
4. In the Save as type drop-down box, select **PDF (*.pdf)**.
5. Click the **Save** button.

Getting Help

For questions about Report Generator or to submit feedback, contact the Report Generator team at ext. 79615 or email ReportGenerator@email.com.

For technical assistance with Report Generator, contact the Help Desk at ext. 72345.