

Export a Chart as PDF

Download the entries recorded on one of a client's Charts for a period you choose, as a PDF you can print, file or share with the people who need the record.

WHO IT IS FOR Owner, Admin, Manager, Coordinator	TIME NEEDED About 4 minutes	LAST REVIEWED 2 October 2026
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Who this is for

Permissions: You need **Can view chart entries** to download a Chart PDF, and **Can view client charts** to see the **Charts** tab. Owners, Admins, Managers and Coordinators have both by default. If **Download PDF** is greyed out in the menu, ask an Owner or Admin to check your role. A manager limited to certain sites sees only the clients at their own sites.

Before you begin

- You are signed in to BondiByte on a computer.
- The client has a Chart with entries in the period you want. See Client Charts history to check what has been recorded.
- You know the period you need, for example the last 30 days or the dates of a review.



Steps

1 Go to **Clients** > the client's record

- 1 In the left menu, choose **Clients**. The **Client Records** list opens.
- 2 Choose the name of the client whose Chart you want to export. Their record opens.

The screenshot shows the BondiByte application interface. On the left, a dark sidebar contains a 'WORKSPACE NAVIGATION' menu with sections for 'PLATFORM' (Dashboard) and 'OPERATIONS' (Clients, Staff, Rostering, Sites, SIL/Smart Rostering, Approvals, Timesheets, Invoicing, Support Coordination). The 'Clients' item is highlighted with a blue circle and a '1' icon. The main content area is titled 'Clients' and features a search bar, a status filter set to 'All statuses', and buttons for 'Import spreadsheet', 'Extract from document', and '+ Add client'. Below this is a table of client records. The table has columns for 'NAME', 'STATUS', 'ACTIVE', and 'ACTIONS'. The 'Mason Ibrahim' record is highlighted with a blue circle and a '2' icon.

NAME	STATUS	ACTIVE	ACTIONS
Noah Bennett Noah	Active	Active	Deactivate
Ruby Chen Ruby	Active	Active	Deactivate
Chloe Davis Chloe	Active	Active	Deactivate
Mason Ibrahim Mason	Active	Active	Deactivate
Ethan Kaur Ethan	Active	Active	Deactivate
Daniel Mensah Dan	Active	Active	Deactivate
Lucas Miller Luke	Active	Active	Deactivate
Grace O'Connor Grace	Active	Active	Deactivate
Henry Roberts Henry	Active	Active	Deactivate
Avery Sample -	Active	Active	Deactivate
Isla Taylor Isla	Active	Active	Deactivate
Amelia Watson			

Choose **Clients** in the left menu (1), then the client's name (2).



2 Open the **Charts** tab

- 1 On the client's record, choose the **Charts** tab.
- 2 In the **Client Chart setup** section, find the Chart you want to export. Each Chart assigned to this client has its own row, and each Chart is exported on its own.

Client Chart setup

Charts assigned to Mason Ibrahim, with their client-specific choices and effective-dated versions.

NAME	STATUS	EFFECTIVE FROM
Sample Fluid Chart	Active	02/10/2026 (version 2)

Rows 50

Back 1-1 of 1 charts Next

Choose the **Charts** tab (1), then find the Chart in **Client Chart setup** (2).

3 Open the Chart's menu and choose **Download PDF**

- 1 On the Chart's row, choose the actions button (three dots).
- 2 In the menu, choose **Download PDF**. A window called **Download chart PDF** opens.

The menu also offers **Edit configuration** and **Activate** or **Deactivate**. They are not needed for an export. **Download PDF** is offered for every Chart, whether it is **Draft**, **Active** or **Inactive**, so you can still export an old Chart.

Client Chart setup

Charts assigned to Mason Ibrahim, with their client-specific choices and effective-dated versions.

NAME	STATUS	EFFECTIVE FROM
Sample Fluid Chart	Active	02/10/2026 (version 2)

Rows 50

Back 1-1 of 1 charts Next

Download PDF

Edit configuration

Deactivate

Choose the actions button on the Chart's row (1), then **Download PDF** (2).



4 Choose the date range

The window says it will export the recorded entries for the Chart you chose.

- 1 In **Date range**, choose **Last 30 days** or **Last 90 days**, or choose **Custom** to pick your own dates.

Last 30 days and **Last 90 days** count back from today and include today. To pick your own dates, go to the next step.

Date range: A list that starts on **Last 30 days**. The other choices are **Last 90 days** and **Custom**. **Custom** adds two date fields to the window.

Download chart PDF
Export recorded entries for "Sample Fluid Chart" as a PDF.

Date range 1
Last 30 days

Cancel Download PDF

Choose the date range (1).



5 Choose the dates for a custom period

Skip this step if you chose **Last 30 days** or **Last 90 days**.

- 1 In **Date range**, choose **Custom**. Two date fields appear.
- 2 In **From**, choose the first day of the period.
- 3 In **To**, choose the last day of the period. The last day is included.

From: Required. The first day to include. It starts 30 days before today. It cannot be later than the **To** date.

To: Required. The last day to include. It starts on today's date. It cannot be earlier than the **From** date.

Download chart PDF
Export recorded entries for "Sample Fluid Chart" as a PDF.

Date range 1
Custom

From 2
15/09/2026

To 3
02/10/2026

Cancel Download PDF

With **Custom** chosen (1), choose the first day (2) and the last day (3).



6 Download the file

At the bottom of the window, choose **Download PDF**. The button changes to **Downloading...** while the file is prepared. Choose **Cancel** instead to close the window without downloading.

- 1 When the file is ready, the window closes and a message confirms **Chart PDF downloaded**. Your browser saves the file, usually in your Downloads folder.

The screenshot shows the client profile for 'Mason Ibrahim'. At the top right, a green notification box with a checkmark and the text 'Chart PDF downloaded.' is displayed, with a blue circle and the number '1' pointing to it. Below the notification, the client's details are shown, including a profile picture with 'MI', the name 'Mason Ibrahim', and status 'Active'. There are tabs for 'Overview', 'Billing Details', 'Service Agreements', 'Documentation', 'Reports', 'Charts', 'Sites', 'History', and 'Imported history'. The 'Charts' tab is selected. Under 'Client Chart setup', there is a table with one chart: 'Sample Fluid Chart', which is 'Active' and has an 'EFFECTIVE FROM' date of '02/10/2026 (version 2)'. At the bottom, there are buttons for 'Back' and 'Next', and a status '1-1 of 1 charts'.

The message that confirms the download (1).

7 Open the downloaded file and check it

Open the file from your browser's downloads or from your Downloads folder. The file name starts with the Chart's name, then the client's name, then the first and last dates of the period, for example **Sample-Fluid-Chart_Mason-Ibrahim_2026-09-02_to_2026-10-02.pdf**.

The document starts with your organisation's name, with your logo above it if your organisation has one, then the Chart's name and the label **Chart**. Under that are the client's name and the **Period** that you chose.

Each entry follows, oldest first, under its own heading **Entry** and the day it was recorded. Each entry gives **Recorded by**, the **Related shift** (the shift's name, date and site) when it was recorded for a shift, and then the Chart's questions under their section headings with the answers. Each entry shows the questions and options the Chart had when the entry was recorded.

A question that is required shows **Not provided** when it has no answer. A question that is not required and has no answer is left out of that entry.

Every page ends with the date the file was generated, the words **Confidential. For authorised use only.** and the page number.

Note: If there are no entries in the period, the document says **No entries in this period.** under the client's name.



What happens next

The PDF is a copy of the entries at the moment you downloaded it. If you correct or deactivate an entry later, download a new PDF.

Only active entries are included. An entry that was deactivated is not in the file.

Downloading a PDF does not change anything on the client's record, and nothing is sent to anyone.

To look at the entries on screen before or after you export, see Client Charts history.

Important notes

Important: A Chart PDF is part of a client's record. The file name and the pages carry the client's name, so keep the file where only the people who are entitled to see the record can open it.

Good practice

- Choose **Custom** and enter the exact first and last day of the review or audit period. The result is then easy to label and compare, instead of the last 30 days, which changes every day.
- Look at the entries on screen first, in **Chart entries**, and correct or deactivate any that are wrong. A PDF includes only active entries, and it shows the answers as they are when you download it.
- Download each Chart on its own. If a client has more than one Chart, repeat these steps for each, and keep the files together under the client's name.
- Check the **Period** at the top of the PDF before you share it. It shows the dates you chose, so you can confirm you exported the period you meant.

Troubleshooting

Download PDF is greyed out in the Chart's menu.

Why it happens: Your role does not include permission to view chart entries.

What to do: Ask an Owner or Admin to check your role, or to download the PDF for you.

The document says **No entries in this period**.

Why it happens: No active entry was recorded between the first and last day you chose. Entries that were deactivated are not included.

What to do: Choose **Custom** and widen the dates. Check **Chart entries** on the client's Charts tab to see which days have entries.

I chose **Last 30 days**, but an older entry is missing.

Why it happens: **Last 30 days** and **Last 90 days** cover only the days counting back from today.

What to do: Download again and choose **Custom** with a **From** date early enough to include the entry.

The window stays open and shows an error message instead of closing.

Why it happens: The file could not be prepared, for example because the connection was interrupted.

What to do: Check the dates and choose **Download PDF** again. If it keeps happening, contact BondiByte support.



The Charts tab says **You do not have permission to view this client's charts.**

Why it happens: Your role does not include permission to view client charts.

What to do: Ask an Owner or Admin to check your role.

I cannot find the file after the message **Chart PDF downloaded.**

Why it happens: Your browser saved the file in its usual downloads folder, or asked where to save it.

What to do: Open the downloads list in your browser, or check your Downloads folder for a file that starts with the Chart's name.

Need more help?

Guides: bondibbyterobotics.com.au/guides | Support: support@bondibbyterobotics.com.au

*Screens show a demonstration organisation with made-up names and may differ slightly as BondiByte is updated.
Last reviewed 2 October 2026.*