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Newsletter :: Sending/Sharing Documents :: March 2009

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Sending and Sharing Documents - What's the best way?

Problems sharing

We come across problems with people not being able to read and share each other's documents so often that we thought we would dedicate this month's newsletter to that one subject.

So, what is the problem with sharing documents with others? Well, the biggest problem we have is that people are sending each other documents to read, that have been created in a word processor (such as OpenOffice, MS Word or Apple Pages) and the recipient is unable to read them at all, or if they can, they do not look like they are supposed to.

This is one of the most common problems we encounter on a day to day basis and it's an area that needs covering, especially as most people don't give a second thought to the recipient, in so far as they create a document in their word processor and just expect everyone else to be able to read it when they send it.

Assumptions

Unfortunately it is not as straight forward as that. By doing just that you would be making the following assumptions: the recipient has exactly the same word processing package as you, the recipient has exactly the same fonts installed on their computer as you have on yours, if all the above match they have

everything in their word processor set up the same as you do.

The chances of all the above assumptions being met at the other end are very small, unless the other person is someone in the same company as you and running everything the same as you. This doesn't actually happen that often.

Add to that the fact that the majority of recipients will be people you don't know and almost certainly someone who's setup you cannot be sure of.

As well as all the above reasons why sending someone your word processing document can cause problems, you should be asking yourself "why am I sending a word processing document"? If the person getting the document is not meant to be editing or working on the file, then why send them a document in a word processing format anyway? Most people who send documents out do not need the recipient to edit the file, so why send one?

Example

To take a specific example, you are sending someone the minutes to a meeting to read and file. You are using MS Word 2007 and have typed it up using a font called "ExtraNiceFont" which you have. You save it as the default file format, ".DOCX".

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Recipient 'A' gets the file. They do not have MS Word 2007. They have Word 2000. They cannot open the file at all. For them to use this file properly you would be expecting them to spend at least £99 to buy a copy, just to read your minutes!

Recipient 'B' gets the file. They have MS Word 2007, but they do not have the font "ExtraNiceFont". Windows will have a guess at using a font which appears to have similar attributes. So, 'B' can read the document, but the layout now all looks wrong, as the font picked is not like the original font at all. Bullet points in the list look wrong too, since the font now being used doesn't have the bullet characters in it, like in the original.

Recipient 'C' receives the minutes in an internet cafe, while reading his email. No word processor is installed so he can't read the document at all yet.

Why send it like that?

Are you getting the idea yet, that unless the person receiving the document needs to be able to edit it, just like you would, then there is no reason at all to send it as a word processing format document at all? Often the recipient will not be able to view it at all, and more often they can see it, but it does not look right and the layout is wrong.

By now, you should be thinking, "Ok I get it, but what can I do about it"? Well the answer is quite simple. If you need to send someone a document to read, then send it as a "PDF" format file. "PDF" stands for Portable Document Format and as the name implies it is designed to be used anywhere, on anything by anyone.

The software you need to read and view these types of files generally comes installed with most operating systems as standard and there is a version available for virtually everyone major platform you are likely to be reading a document on, including Apple, Windows, Linux, Unix, Windows Mobile, Symbian phone, iPhones and a whole lot more.

All the PDF reader software is free and in addition there are hundreds of PDF document editing and manipulation tools available to work with standard PDF files.

Why use PDF files?

Well, the PDF document format carries with it the fonts, graphics, layout and everything that is needed to display the document exactly the same on every platform, so you can more or less guarantee that when you send out a PDF document, everyone will see it just as you intended and it does not matter what software you used to create it, whether that be a word processing program, a spreadsheet program or a computer aided design system. It is a truly portable document format.

"Ok, that sounds great, but how do I create one of those"? The beauty of creating PDF files is that you just create your document in your favourite software package, whatever that is, as you normally do, then save it as a PDF file. Then simply send all your recipients the PDF file. Everyone will be able to read it properly, even on popular mobile phones. Your original file stays just as it is for you to edit and update as normal. You can then create another PDF file

when you need to after editing and send out updates. Easy.

What software do I need?

The software you use to do this will depend on which operating system you are using. We'll run through those options for you.

If you are using an Apple then you have no problems at all, Apple has all the software for creating PDFs built right in. Just print your document and when the print options pop up, just click on the "PDF/Save as PDF option" and you will be able to save any document you can print as a PDF file, it's that simple.

If you're on Windows, either Vista or XP you have a variety of options. If you are using OpenOffice then the option to "Export as PDF" is built into the software, so you can save any documents or spreadsheets straight out as a PDF file without any additional software.

On Windows using MS Office 2007 you can install an extra Office plug-in from Microsoft to allow you to be able to do the same thing as you can in OpenOffice, to export as a PDF file.

Whilst the above options for Windows work fine for saving word processing and spreadsheets as PDF files, they do not allow you to save anything as a PDF file. Luckily there is an open source and free piece of software called PDFCreator, which you can use to save anything as a PDF file. You can download the software from:

http://tinyurl.com/p3ly

This software will install itself as a printer on Windows. So, anything you can print you can save as a PDF, just like on an Apple computer. When you get the print window up, just choose the PDFCreator printer and click print. You will then be prompted to choose a filename and location to save it as.

Using this software will enable you to create PDF files from any application and know that when you send the file to virtually anyone, they will be able to read it and it will look just as you

intended it to. In the unlikely event that the recipient does not have a PDF reader installed, you know that they can download one for free, most of which you'll find at:

http://get.adobe.com/reader/
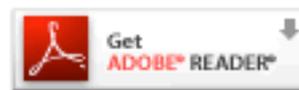
There are also a host of other PDF manipulation tools available for all platforms, so there really is a lot you can do with them, so sending out unnecessary word processing documents should be a thing of the past for all our customers!

Well, hopefully you will have learnt something about why we advocate sending and sharing PDF files and just how easy that can be, so until next time, get PDFing!

Thanks for reading, see you next issue!