Saving and sharing documents

Version 1, March 2008

Many people assume that if they create a document in a word processor (e.g. Microsoft Word) and send the file to someone else, the other person will be able to open it. However, this is not always the case – it depends on what format the document is saved in and what software the other person has. There can also be problems when sending files via e-mail because some e-mail systems block some types of document.

This doesn't just happen with word processor files. Other file types such as spreadsheets are also affected, but as word processing documents are the most common type we'll concentrate on these here.

I'll start with a basic explanation of the most common file types. Then I'll give some simple guidelines and suggestions for each of the most common word processors in use. I have also provided two quick reference tables which contain the most important information – one summarises the different file types discussed here, and the other shows which file types are compatible with which programs. These should be available from the same source as this document.

Common file types or formats

First – what is a file type or format? Basically it's the “code” that the word processor uses to store the document in a file when you save it. Different programs use different codes and if a program doesn't “know” the code that has been used in a file it can't open it.

So how do you know which file type – which “code” - has been used in a file? Well, you can usually tell from the name of the file. For example, if it ends in ***.doc***, it's probably the Microsoft Word file type. However, sometimes in Windows the part at the end of the file name (called the *extension*) is hidden. If so, you can usually find the file type by putting the mouse over the icon for the file in question and pausing – a box will pop up and tell you the file type.

Below is a brief description of the most common document file types.

Microsoft Word: *.doc*

This is the default format for versions of **Microsoft Word** prior to 2007. In other words, if you press “Save” in Word and don't choose a different type, this is what you will get. It's probably the world's most common document format, but it's not without its problems, and is now being superseded by newer formats. The main issues with it as far as most people are concerned are:

- It is sometime used to carry viruses, so some e-mail systems block it.
- The format (the ”code”) was not formally published – it's an entirely unofficial “standard” and there are no guarantees that files saved in this format can be opened in the future.
- There are several variants of this format so files saved by one version of Microsoft Word may not open correctly in a different version.

- Support by non-Microsoft programs is limited.
- The appearance of documents may vary between computers.

If you are sending documents to a small number of other people and you (a) know that they can open ***.doc*** files and (b) know that their e-mail systems do not block these files, then this is a reasonable choice of file type. It is not such a good choice for widespread document distribution – consider using **PDF** or **RTF** instead.

OOXML (MS Word 2007 on): *.docx*

This is the default format for **Microsoft Word version 2007**. Whilst in principle it's an improvement on ***.doc***, it is not well supported at present. Microsoft are attempting to get it approved as a standard, but there is a lot of resistance at the time of writing – mostly owing to the complexity of the standard and the fact that Microsoft are attempting to retain control of aspects of the standard. At present it's not a good choice for document distribution.

Oasis OpenDocument Text: *.odt*

This is an international standard format approved by the ISO (International Standards Organisation). It is the default format for **OpenOffice.org** and several other word processors, but unfortunately is not supported at present by Microsoft Office. It is not widely used at present but is becoming more common. Because it is a standard, documented format, it's a good choice for long term document storage. However, its only suitable for document distribution if you know that the recipients either have or are willing to install the (free) OpenOffice.org or another compatible program.

Portable Document Format (PDF): *.pdf*

PDF (sometimes known as “Acrobat format”) is the format used by the **Adobe Reader** (formerly **Acrobat Reader**). Documents using this file type can be read on just about any computer, as Adobe Reader and other freely available viewers are available for many different systems, and are usually installed. It also tends to be more reliable at displaying document layout correctly when documents are viewed on different computers. Thus it is a popular format for use on the Internet. However, documents saved in this format cannot (easily) be altered, so if you use this format you will also need to save a copy of the document in another format if you ever need to alter it in the future.

This is this a very good choice for sending documents to other people who will not need to alter them. They have a better chance of viewing them than just about any other format. Some word processors (such as OpenOffice.org Writer) can “export” (I.e. save) in this format, but others (e.g. Microsoft Word) cannot. However, converters are available to enable files to be created in this format from just about any program. Examples include **pdf995**, **PrimoPDF** and **CutePDF**, all available for download from the Internet.

Rich Text Format (RTF): *.rtf*

RTF is a fairly basic but well documented format which is supported by most word processors. If you need to send a document to other people and you are not sure what word processor they use, it is a good choice, especially if they may need to be able to alter the document (which cannot easily be done with **PDF** format). It does not support advanced formatting so you may find it unsuitable for very complex documents, but it is fine for most purposes.

Guidelines for Word users (except 2007 and above)

If you use a version of Word earlier than the 2007 version, your files will normally be saved in ***.doc*** format. This is fine for most purposes. It's also OK for e-mailing or giving to other people if you (a) know that they can open ***.doc*** files and (b) know that their e-mail system does not block them.

However, if you are not sure that the recipient can receive or open these files, or if you are sending the document to a lot of people, it's not such a good idea. Either save a copy in RTF format, or (if you are regularly distributing documents) install a PDF converter – several free ones are available (see the section on Portable Document Format above) as well as the commercially available ones.

Guidelines for Word users (2007 and above)

By default Word 2007 saves files in the OOXML ***.docx*** format. This is not a problem as long as you are only saving the files for your own use. It's also OK for e-mailing or giving to other people if you know that they have Word 2007 or that they have an earlier version of word and have installed the converter to allow them to read these files.

However, it's not (at least at present) a good choice for general document distribution. Word 2007 can save in ***.doc*** or RTF format, so you can use these by choosing “save as” – RTF is preferable if you are distributing to a large number of people or if you are not sure that your recipients can handle ***.doc*** format. Alternatively, you can install a PDF converter program – see thesection on Portable Document Format above.

Guidelines for OpenOffice.org users

By default OpenOffice.org saves its files in Oasis OpenDocument Text (***.odt***) format. When saving documents for your own use this is the best choice. However, as many people don't currently have the ability to open these documents (unless they are willing to install OpenOffice.org), OpenDocument Text is not currently such a good choice for document distribution.

However, OpenOffice.org users are perhaps the best off when it comes to distributing documents as it can save files in many different formats, including ***.doc***, RTF, and PDF. My suggestion would be that you store documents in OpenDocument Text for your own use, but use PDF, RTF or ***.doc*** for distributing documents to other people. If they don't need to change the document PDF is the best choice. If they need to modify it then use RTF unless you know that they are using Microsoft Word and the document is relatively complex, in which case choose ***.doc***.

© Bovett Computer Services. March 2008