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Mac Utilities – Archiving Files as a PDF Document

Note: This discussion is based on MacOS, 10.14.5 (Mojave). Some illustrations may differ when using other versions of macOS or OS X. Most illustrations are from screenshots on my iMac.

In this Mac Basics presentation, we'll cover archiving files by saving in the **PDF format**. This topic was picked based on a recent email discussion about obsolescence of file formats and how to open old files when the app that created them is no longer available or no longer works in the macOS.

No document type or storage medium will last forever. Remember ClarisWorks or the 3½" floppy disk? When is the last time that you used a CD-ROM disk or burned files to it? The same concern applies to apps and their files.

One of the longest-surviving document formats is the Portable Document Format (PDF). As noted in Wikipedia:

The Portable Document Format (PDF) (redundantly: PDF format) is a file format developed by Adobe in the 1990s [June 1993] to present documents, including text formatting and images, in a manner independent of application software, hardware, and operating systems. ... Based on the PostScript language, each PDF file encapsulates a complete description of a fixed-layout flat document, including the text, fonts, vector graphics, raster images and other information needed to display it.

PDF is now an open standard maintained by the International Organization for Standardization (ISO), and it's widely used. So, it stands a good chance of being around for some time and can be used as a means of archiving other files.

The advantage of PDF is that most any type of document can be saved in PDF format (with audio and video files being an exception, but their formats can be managed by a variety of apps). So, even if the original document type can no longer be read—perhaps the application that created it is obsolete or no longer works on macOS—if you've previously saved it in the PDF format, the form and substance of the document can be preserved for viewing (even editing to some extent).

There are several ways to save a document in PDF format depending on the app that you're using.

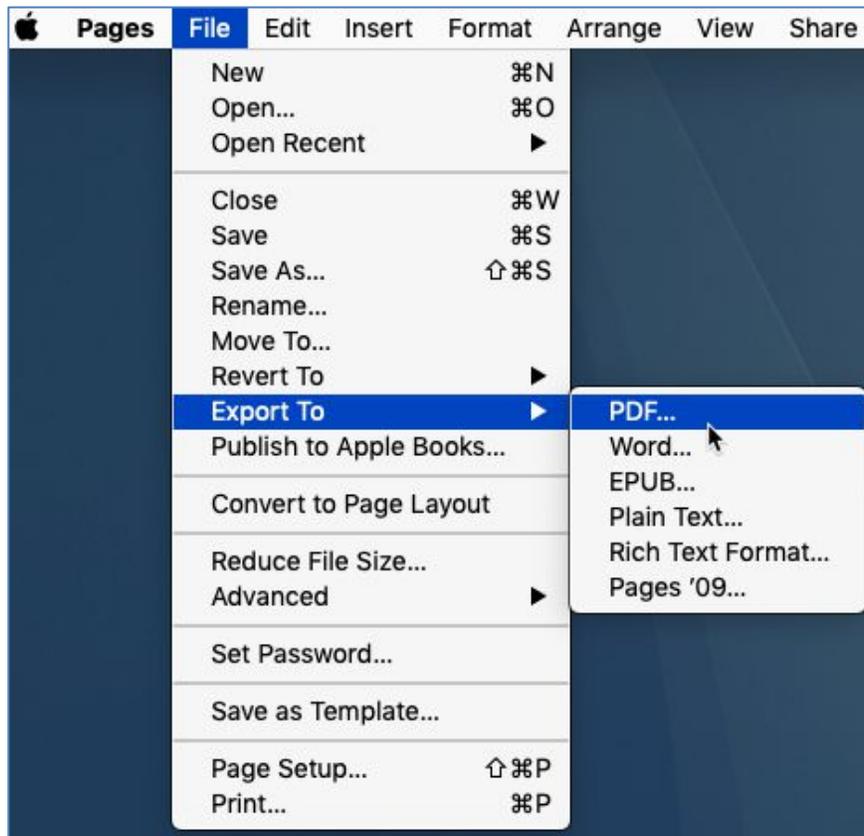
Export To

Check the app's **File** menu for **Export To**.

Pages, Numbers and Others. Some apps from Apple use **Export To** and then offer several export formats, one of which is **PDF...** (Other apps may offer this option as well.)

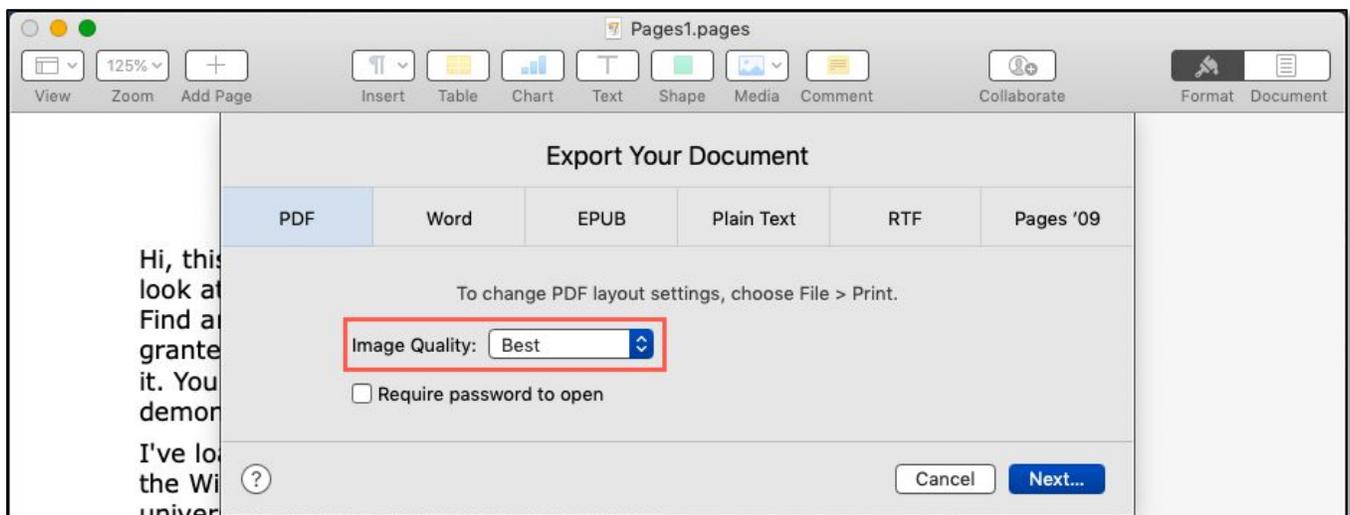
Here's an example from **Pages** (next page):

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Export to PDF...

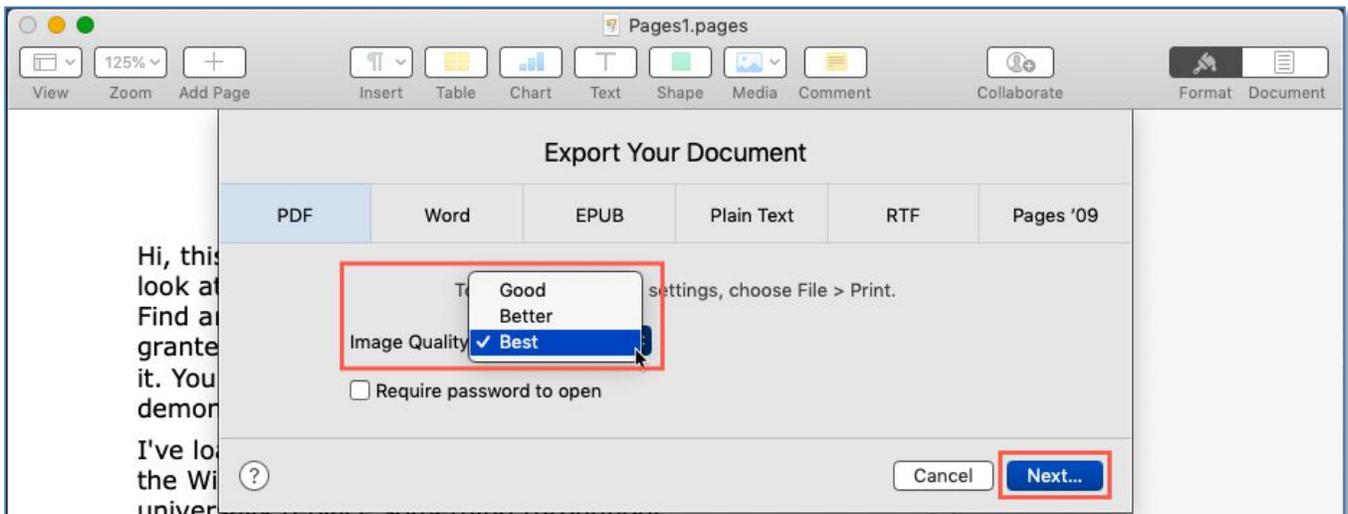
When using **Export To** and choosing **PDF...**, you're presented with the option to choose the **Image Quality** when you save the PDF:



Export to PDF (Image Quality Option)

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There are three different qualities ([Good](#), [Better](#) and [Best](#)) to choose from:



Export to PDF (Image Quality Choices: Good, Better or Best)

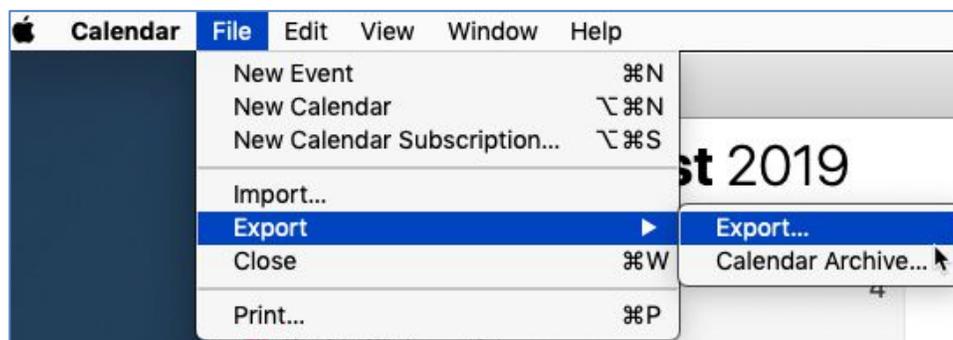
In addition to giving you different PDF qualities, this option also results in different file sizes, with [Best](#) being the largest. The file size for these different options depends on the size of the original document, including the number of included images, so you may want to experiment with these three options to decide on which quality is acceptable. It's unclear if other apps have/will adopt this [Export To](#) option.

After choosing a PDF image quality option, click the [Next...](#) button to bring up the [Save As](#) dialog box to rename (if you wish) and save the file.

Other Apple apps use a different [Export](#) option.

Export (less frequent)

Some apps may use [Export](#) to save in another format. However, be aware that *they likely don't offer the PDF format*. For example, Apple's [Calendar](#) app uses [Export](#) but doesn't offer PDF:



Export

Instead, you're presented with a [Save As](#) dialog box and prompted to save the file in the app's format. For example, the [Calendar](#) app defaults to a file name of [Calendar.ics](#). There's also a [Calendar Archive](#) option ([filename.icbu](#)).

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Export as PDF

Safari, TextEdit, Mail, Maps and Others. These Apple apps use **Export as PDF...** Other apps may offer this **Export as PDF...** as well.



Export as PDF...

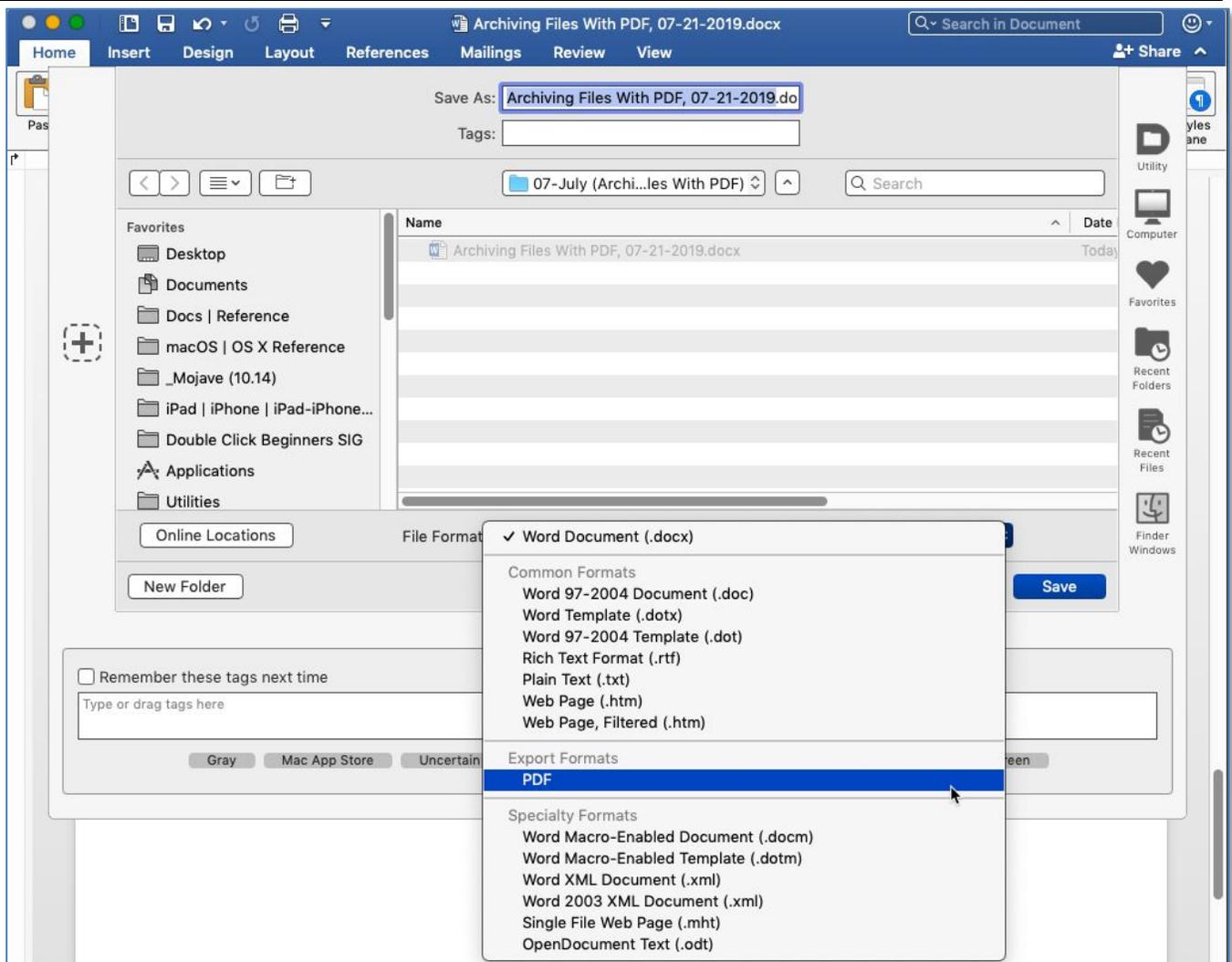
Choosing **Export as PDF...** brings up the **Export As** dialog box (same as the **Save As** dialog box) for saving the file.

No Export Option? Try "Save As..."

If an app doesn't offer an Export option, try using the **Save As...** menu item under the **File** menu. This will bring up the **Save As** dialog box that may include PDF as a saved file format. (I haven't examined apps for this **Save As** option, so I don't know how many have this option to save as a PDF.)

I use Microsoft Word a lot, but it doesn't have an Export option. However, using **Save As** offers a variety of file saving options including an **Export Format** of PDF. (See the next page.)

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Microsoft Word "Save As" File Formats (Export as PDF)

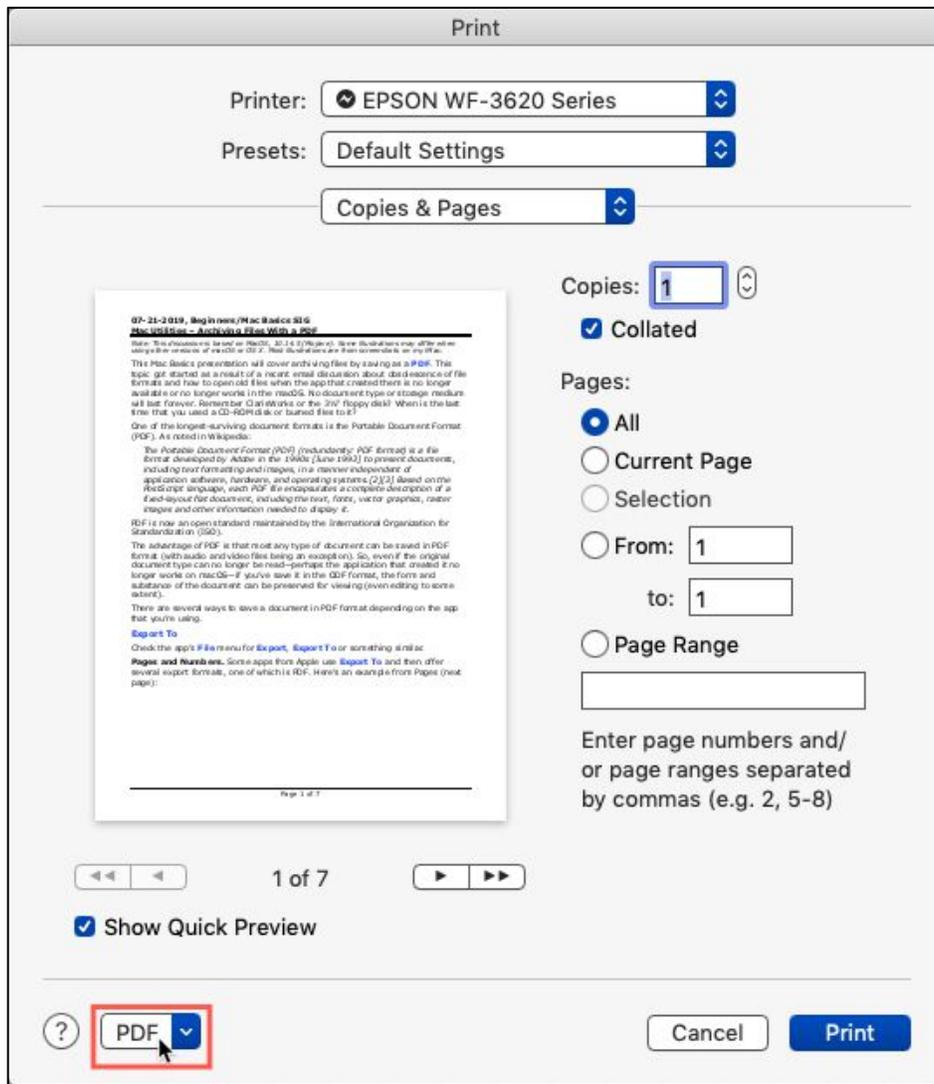
No Export Option? Try "Print" and the PDF Feature

In the **Print** dialog box of most apps will be found the **PDF** saving feature. This depends on the feature being included in the printer driver software.

Here's the one for my Epson printer. Note the **PDF button** at the bottom. (See the next page.)

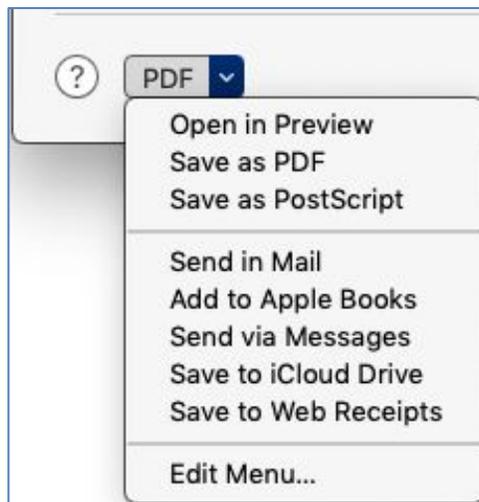
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Print Dialog Box (with PDF button)

Click the **PDF button** to reveal the various options in the dropdown menu:

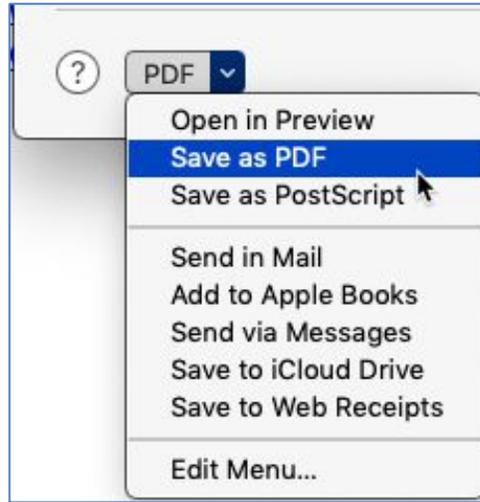


PDF Button (Open, Save and Send Options)

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In this presentation, we'll focus on the **Save as PDF** and **Open in Preview** options.

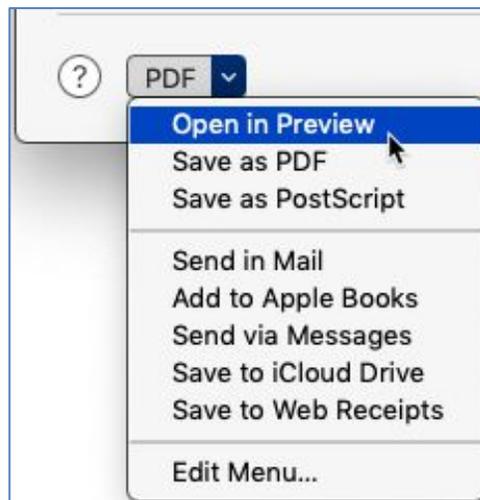
Save as PDF. This option does what's expected (saves the file in PDF format). It then opens the **Save As** dialog box so you can choose to rename (if you wish) and where to save the file:



PDF button (Save as PDF)

Notice that you can choose to save the document as a PDF and then send it to other apps such as the **Mail** and **Messages** or save it somewhere such as iCloud Drive.

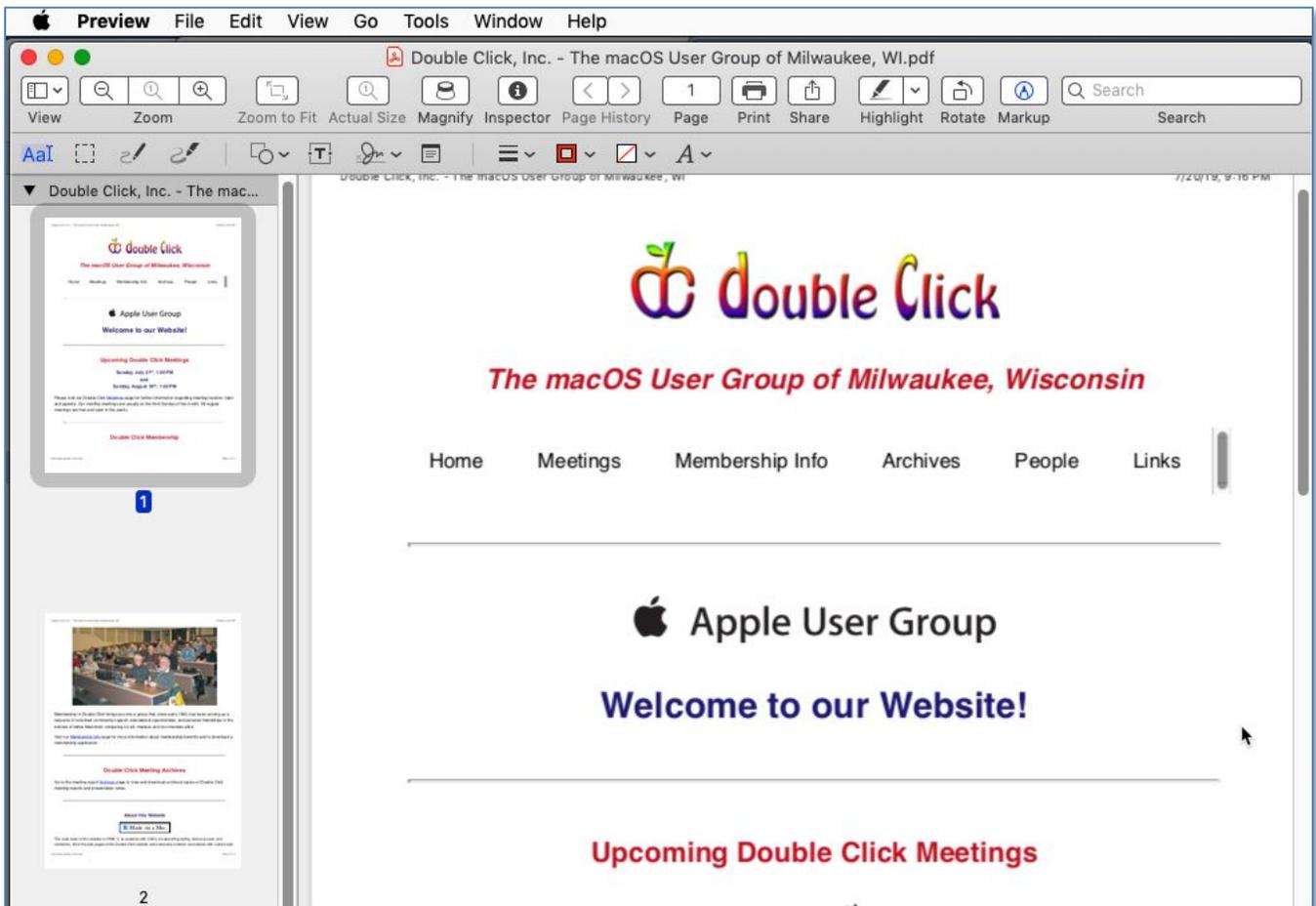
Open in Preview. I prefer this option, even though it adds an additional step to saving the file, because I can do some editing of the PDF with the **Preview**:



PDF button (Open in Preview)

- **Annotate** – Add some highlighting to the PDF to call attention to certain sections or perhaps add a clarifying note. (See the next page for a PDF of a familiar webpage opened in Preview.)

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Double Click, Inc.'s Webpage (Viewed as PDF in Preview)

In this illustration, the **Markup** button has been clicked to display the **Markup Toolbar** for annotation if desired (do freehand drawing, add shapes, add text, fill color, etc.). Click the **Highlight** button to highlight items, especially text, in the PDF.

Note: All these actions will increase the file size of the PDF.

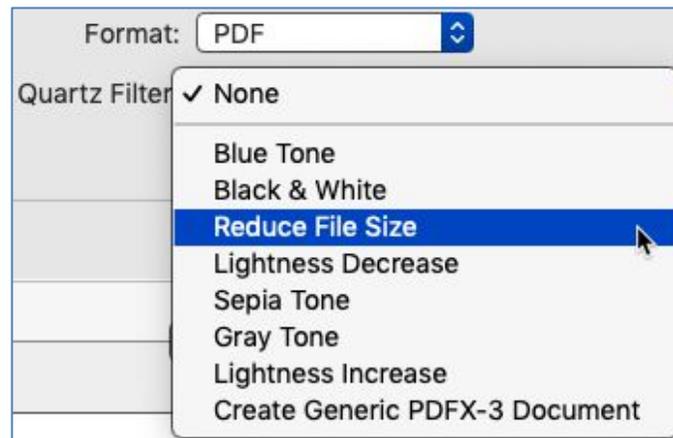
- **Delete Unnecessary Pages** – This is often the case with pages from web articles that I save for future reference. Using the **Safari** app, I use the **Reader** view when it's available (not always the case) to minimize unnecessary information on the webpage (blank pages, ads, etc.) when possible before saving as a PDF.

Reduce PDF File Size

Some PDFs can be gigabytes (GB) in size, especially those saved from certain webpages with lots of images, even when using the **Reader** option to focus on the content and remove other material on the webpage such as ads.

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If you're using [Preview](#) to create and edit a PDF, saving the file has a **Reduce File Size** option to try out under the [Quartz Filter](#) dropdown menu:



Preview App (Reduce PDF File Size With Quartz Filter)

There are a number of utilities that not only open, edit and convert PDFs to other formats but can also reduce (compress) the file size.

I'm a satisfied user of [PDF Squeezer](#) (\$5.99 at the Mac App Store) to reduce file size. If you want to check it out, here's the link to the [PDF Squeezer webpage](#).

Summary

- Saving files in PDF format offers a good option for long-term archiving. While no file format will likely last forever, this one has been long-lived, it's been adopted an open standard maintained by the ISO, and it's widely used.
- **Export To** – Several Apple apps offer an [Export To](#) menu item under the [File](#) menu for saving a file in several formats, including PDF.
- **Export** – Several Apple apps (and some others) offer an [Export](#) menu item under the [File](#) menu. However, these likely will only save the file in the app's native format and not as a PDF.
- **Save As** – The dialog box that's displayed after using the [Save As...](#) menu item under the [File](#) menu may include PDF as a saved file format.
- **Print and PDF Feature** – In the [Print](#) dialog box of most apps, there will be a [PDF button](#) at the bottom. Clicking this button will reveal various options in the resulting dropdown menu. [Save as PDF](#) brings up the [Save As](#) dialog box to save the file. [Open in Preview](#) opens the PDF file in the [Preview](#) app for annotating and editing before saving the file.
- The PDF file that you create may be very large (common for PDF files created from some webpages). If you want to reduce the file size, [Preview](#) offer this option as does several third-party PDF viewing and editing apps. I like to use the [PDF Squeezer](#) app.

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Next Presentation

For the next presentation, we'll take a look another macOS utility.

Have a favorite Mac Tip or utility? Please feel free to pass it along, and I'll see if I can work it into a future presentation.

If you have any suggestions for presentation topics, including macOS utilities, please contact me at slp4668@gmail.com.

-Steve Parker