

Creating PDF/A using Office Apps which Include 1-button PDF Creators

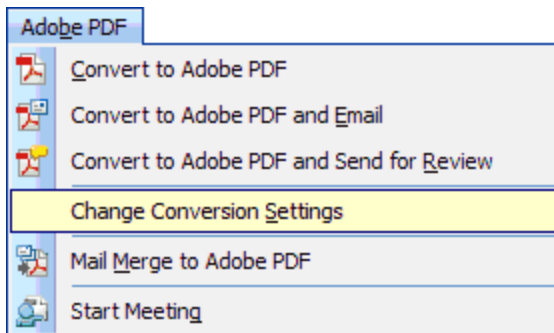
If you are using an application such as Word, Excel, PowerPoint or Visio, Adobe Acrobat provides direct creation of PDF using the one-button PDF Creators (PDF Makers).

The PDFMakers offer improved functionality over the Adobe PDF Printer and is the preferred method if available.

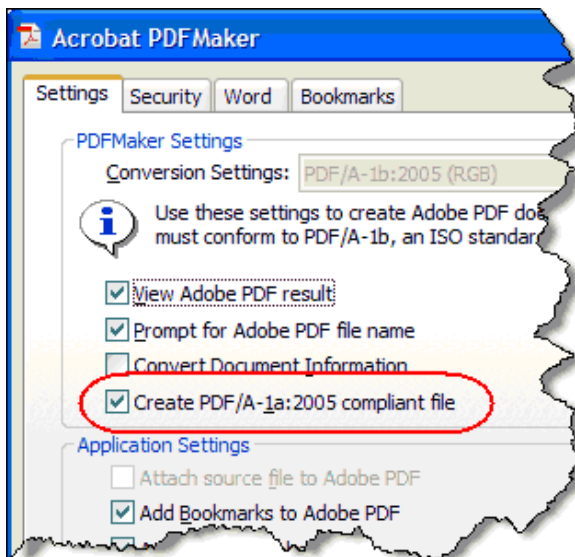
The PDFMakers offer a richer conversion which result in a PDF/A-1a file— a more stringent interpretation of PDF/A. These files contain tagging (accessibility and reflow) information and other elements required for this level of conformance .

The following example is from Microsoft Word:

1. Choose AdobePDF—>Change Conversion Settings



2. The Conversion Settings window appears:



3. Check *Create PDF/A-1a:2005 compliant file* and click OK.

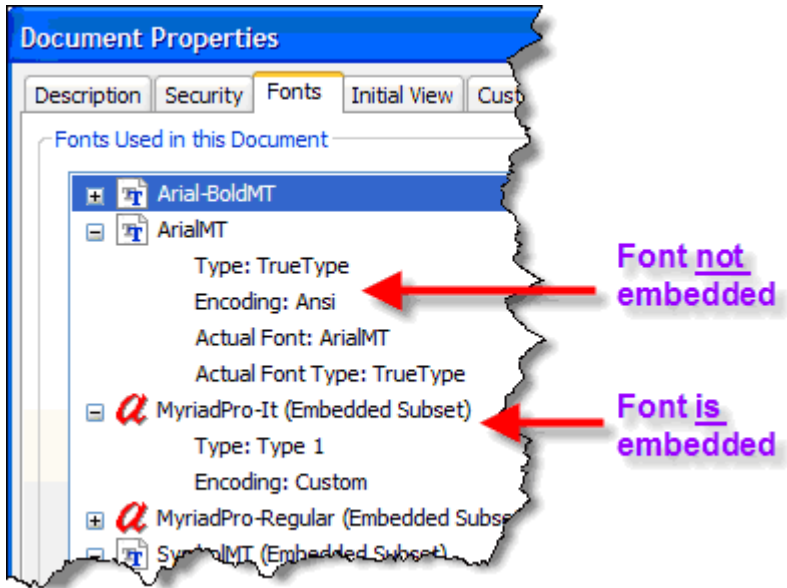
The setting will be sticky for all future sessions of Microsoft Word (or other office application).

To create a PDF/A file, choose on of the following:

- AdobePDF—>Convert to Adobe PDF
- Click on the PDF icon in the Acrobat toolbar installed in Microsoft Word




You can check to see if fonts are embedded in a PDF file by choosing File—>Properties and clicking on the Fonts tab.

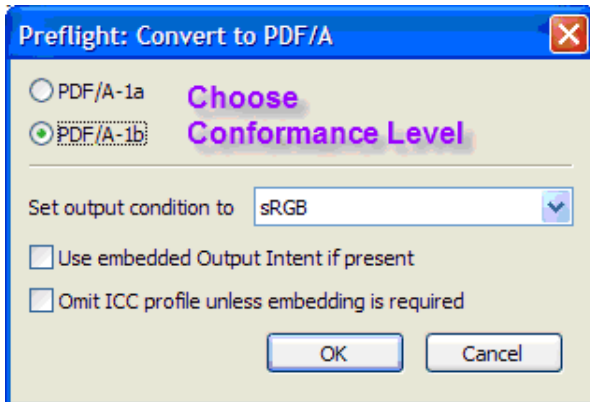


Converting existing PDFs to PDF/a


Scanned files such as PDF Image-only files present no problems moving to PDF/a-1b compliancy

To convert an existing to PDF to PDF/a:

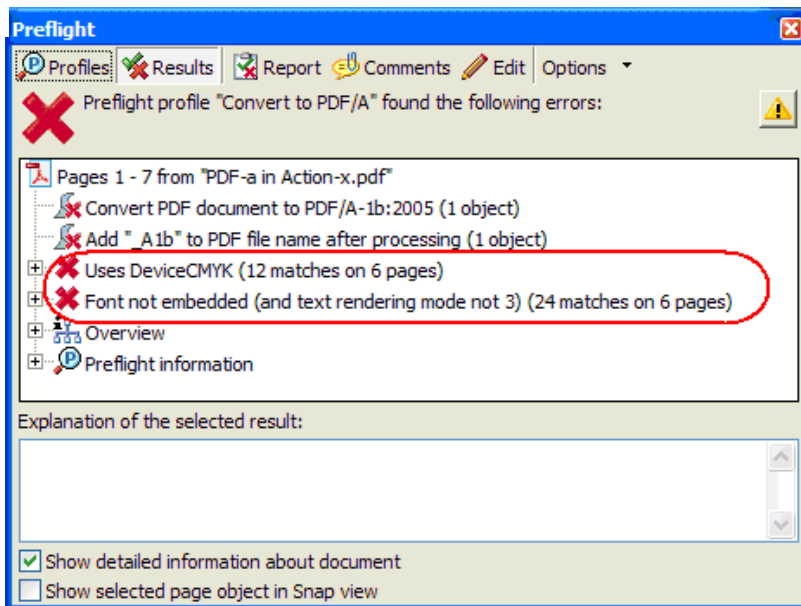
1. Open the PDF to be converted
2. Choose Advanced—>Preflight
3. Click at the bottom left corner of the Preflight window 
(If you get the Not a PDF/A file icon you may not be able to convert the document using this method, click the icon and try)
4. The Preflight convert window appears.
Choose the PDF/a conformance level desired.



For most Office-type documents, sRGB is the appropriate choice for the output condition.

1. Click OK.
The Preflight operation will run.
If the document can be brought into compliancy, the will appear in the lower left corner of the Preflight window. 

2. If the document cannot be made compliant, the Results window will display the problems: try Creating PDF/A using the AdobePDF Print Driver



Items with a red X indicate problems. In the example above, fonts were not embedded and CMYK images were used when sRGB was used as the output intent.

Issues to Understand: Converting existing PDFs to PDF/a

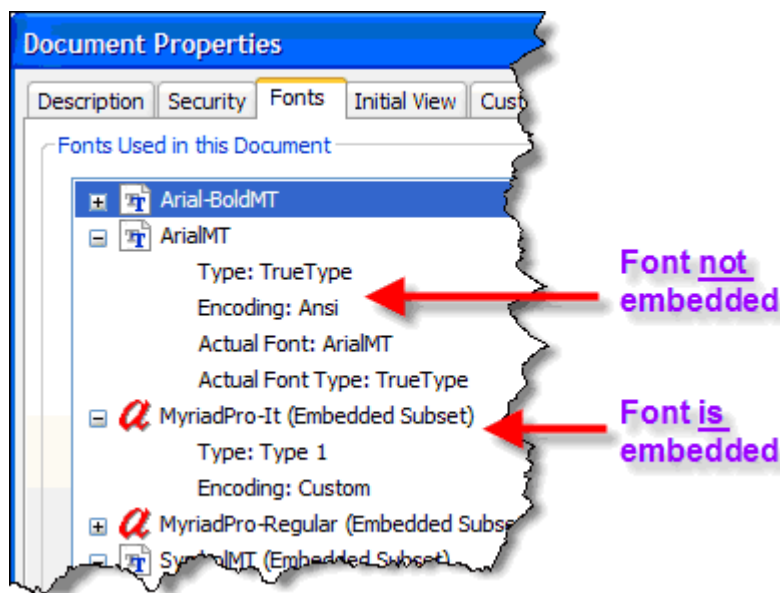
It can be challenging to convert existing, non-compliant documents to PDF/a, especially the strict PDF/a-1a standard.

In order to be PDF/a compliant . . .

- All fonts must be embedded
- The file must be a PDF 1.4 (Acrobat 5) level file
- The file must not contain external links, dependencies, attachments, multimedia elements, etc.

Non-embedded fonts are the greatest obstacle to attaining PDF/a compliancy. Many—perhaps even the majority—of existing PDFs do not have all fonts embedded. For example, Acrobat's default PDF creation setting (Standard) does not embed common Windows fonts such as Arial, Verdana and Times New Roman. The *Standard* creates very compact files, but assumes that standard fonts are available for viewing.

You can check to see if fonts are embedded in a PDF file by choosing File->Properties and clicking on the Fonts tab.



Unfortunately, Acrobat does *not* provide a method to embed fonts in a document *after* it has been created.

The only workaround is to print the PDF to the AdobePDF print driver using the PDF/a-1b setting. Unfortunately, this method removes some valuable information such as bookmarks and links. Some users also think this makes the file less stable, but that has never been my experience.

If tags are added to the document (Advanced->Accessibility->Add Tags to Document), it may be possible to bring the file to PDF/a-1a compliancy.

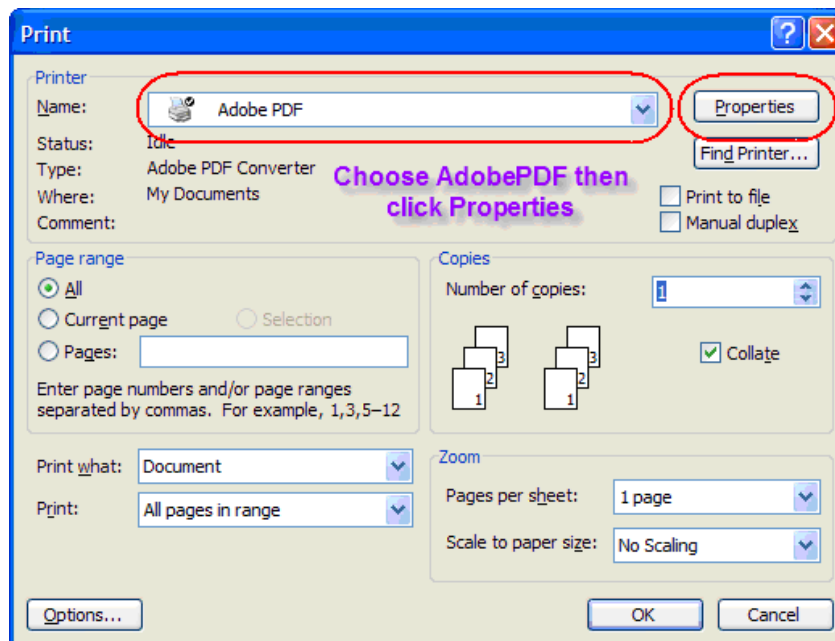
Scanned files such as PDF Image-only files present no problems moving to PDF/a-1b compliancy.

Creating PDF/A using the AdobePDF Print Driver

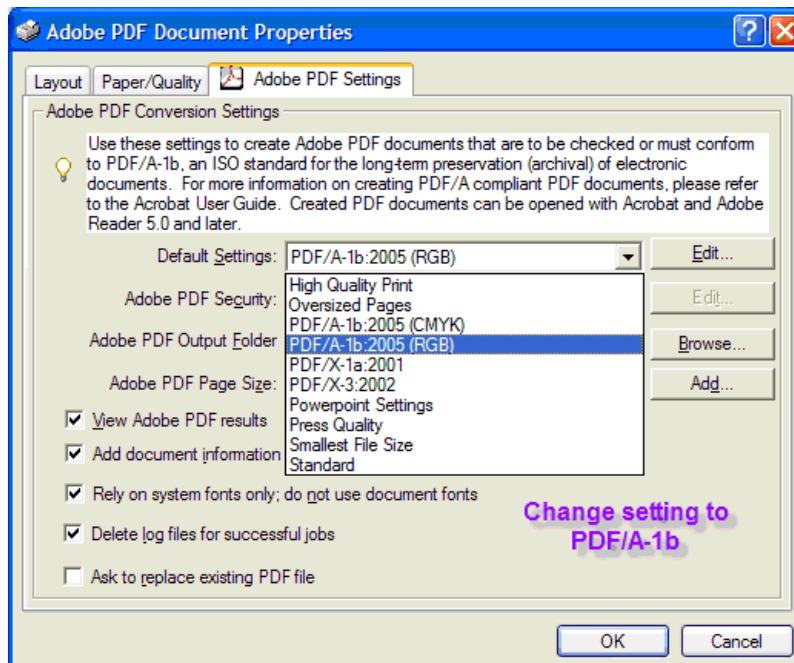
Acrobat provides the capability to convert the print output of any application to a standardized PDF/A file.

To print from any application to a PDF/A file, follow these steps:

- If not already created. Create tags to the document (Advanced—>Accessibility—>Add Tags to Document)
- Go to File—>Print
Choose the AdobePDF print driver from the pop-up list



- Click the *Properties* button
The AdobePDF Document Properties window will open.



- Choose the PDF/A-1b:2005 (RGB) setting.
This is my recommended setting for legal documents. All fonts are embedded and colors are managed in the RGB system.
- Click OK to return to the Print Window
- Click OK to start the conversion process. Acrobat will ask you for a file name and location.

Once you go through this process once, the settings are “sticky” for future sessions.

Note that use of the AdobePDF Print Driver creates a basic type of PDF devoid of several useful PDF features such as bookmarks, links, tags and so on.

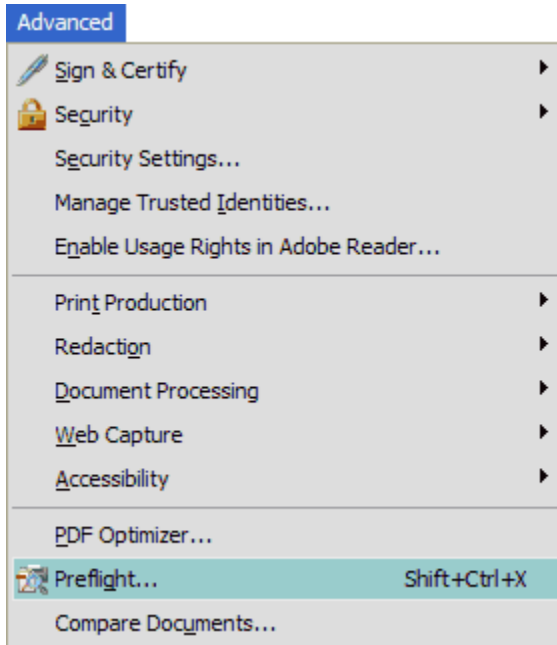
Because of these limitations, using the AdobePDF Print Driver can only create files that minimally conform to the PDF/A spec—the less stringent PDF/A-1b type.

Verifying PDF/a Compliancy




The Preflight options of Acrobat Professional allow you to check PDF/a compliancy.


To check a file for conformance, perform the following steps:

1. Open the PDF to be checked
2. Choose Advanced—>Preflight (Make sure the Profile tab is selected)



3. The lower left corner of the Preflight window displays buttons that depict the status of the file and allow you to perform operations:

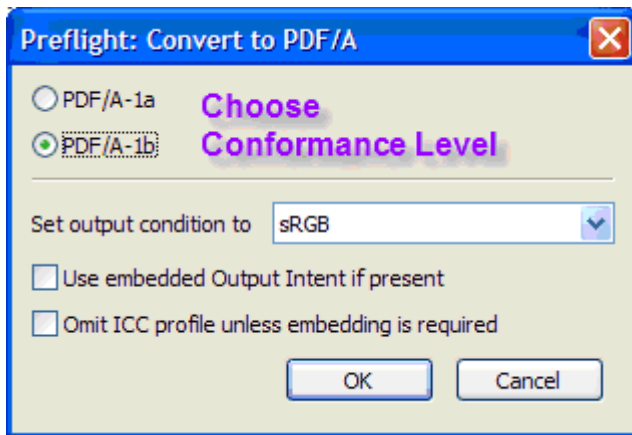
Icon	Status Depicted	Click button to . . .
	Not a PDF/A file	Convert to PDF/a
	PDF/a, but not verified	Verify status
	Verified PDF/a File	Remove PDF/a elements

To verify PDF/a compliancy, click the  button.

The Icon will change when verified 


To convert to a PDFa click the  Not a PDF/A file button.


1. The Preflight convert window appears.
Choose the PDF/a conformance level desired.



For most Office-type documents, sRGB is the appropriate choice for the output condition.

1. Click OK.
The Preflight operation will run. Select the Profiles tab

If the document can be brought into compliancy, the  will appear in the lower left corner of the Preflight window.

2. If the  is not displayed try creating the PDF using a PDF Driver.

Checking Metadata for Indications of PDF/A Conformance

A compliant PDF/a file includes metadata indicating that it was conforming at the time it was created.

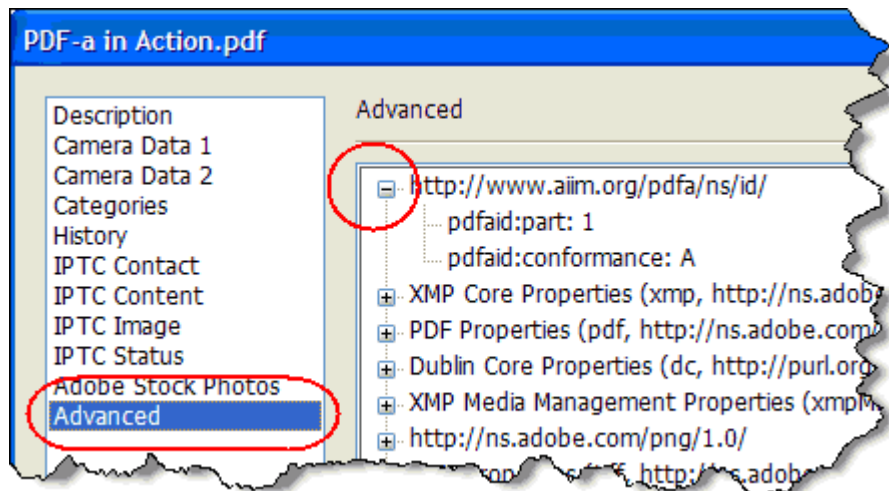
To view the metadata indicating PDF/a conformance:

1. Choose File—>Properties
2. Click the Additional Metadata button

Additional Metadata...

In the Additional Metadata window:

- Choose Advanced from the panel on the left
- Expand the *first entry* properties list



Even if the metadata is present, it does not guarantee that the file actually *is* PDF/a compliant. For example, a PDF/a file may have changed since it was originally created. The document metadata does not automatically update to indicate the change.