Instructions for Saving Your Thesis as a PDF/A

1. **Remove any security restrictions** (password, certificate, etc.) on the documents. These restrictions could hamper future use or transformations of the documents, and can interfere with screen readers. This is also a PDF/A requirement. You must save your thesis in PDF/A format.

2. **Embed and subset *all* document fonts**, including the 14 standard Type 1 fonts (Times-Roman, Times-Bold, Times-italic, Times-BoldItalic, Symbol, Helvetica, Helvetica-Bold, Helvetica-Oblique, Helvetica-BoldOblique, Courier, Courier-CBold, Courier-Oblique, Courier-BoldOblique, ZapfDingbats). Do not use fonts that can't be legally embedded.

3. **Specify the natural language** primarily used in the document. You can set the language for a document in Acrobat Pro through File->Properties, Advanced Tab, then select a Language from the pull-down list in the Reading Options section.

4. If it is important that **the images in the PDF be high resolution, do not downsample** (decrease the number of pixels in) the images. Downsampling is an option in PDF optimizing but can lead to poor quality images. Also, remember that a PDF/A requirement is that you not use transparency in images.

5. For any **hyperlinks in the document, write out the URIs**, for example: AIIM International (http://www.aiim.org) instead of AIIM International. Also, do not embed nor attach files to PDF documents. Also, remember that a PDF/A requirement is that you not use the Launch, Sound, Movie, ResetForm, ImportData, or any JavaScript actions.

6. **Validate your PDFs**. PDF validation is especially important when developing the creation work flow for your PDF files so that you can verify that the tools and process you are using will result in preservable PDFs. (The Preflight tool within Adobe Acrobat Professional 9 is able to find PDF errors not found by Adobe Acrobat Professional 8 nor JHOVE 1.1)

7. **Improve your PDFs**. Use a tool on your PDF files to convert them to a PDF/A format (if possible), fix any problems with them, add metadata to the files, etc. Any conversions should replicate the exact content and quality of the source document in the new document.

SUGGESTED

8. **Add metadata**. Embed metadata in your PDF documents. Some metadata will be automatically added for you to the document by your PDF creation software. You can add additional metadata manually per PDF or as part of a batch process. The following metadata is recommended:
   - Title - either pdf:Title and/or dc:title and/or xmp:Title *
   - Author - either pdf:Author and/or dc:creator and/or xmp:Author *
   - Subject - either pdf:Subject and/or dc:description and/or xmp:Description *
   - Keywords - pdf:Keywords and/or dc:subject and/or xmp:Keywords *
   - Creator - either pdf:Creator and/or xmp:CreatorTool *
   - Producer - pdf:Producer
   - CreationDate - either pdf:CreationDate and/or xmp:CreateDate *
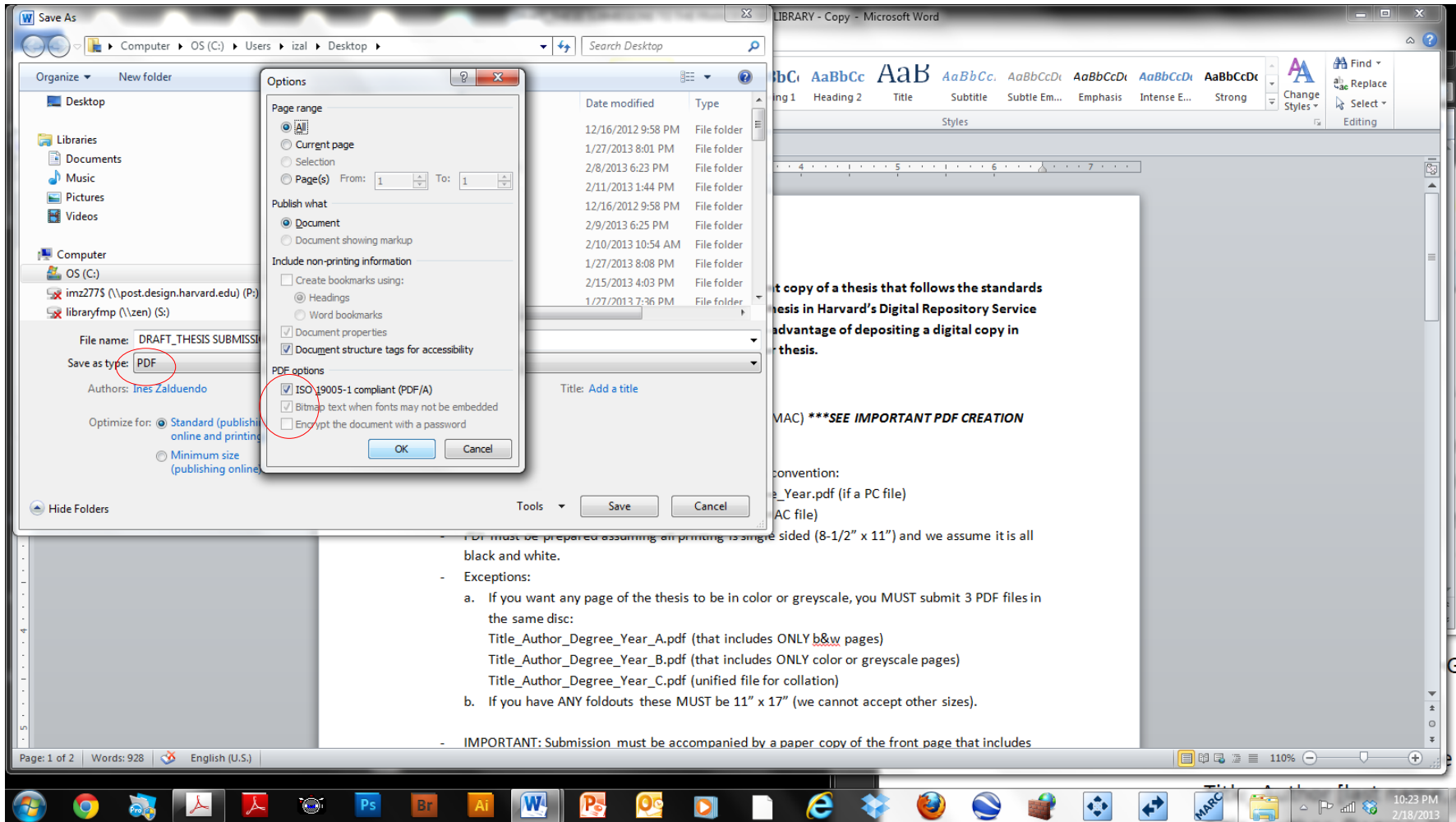   - ModDate - either pdf:ModDate and/or xmp:ModifyDate *

   * When equivalent multiple metadata elements are present in a document (e.g. pdf:Title and dc:title), their values should be equivalent.

*** See also the document entitled *PDF CREATION EXAMPLES****

PDF CREATION EXAMPLES

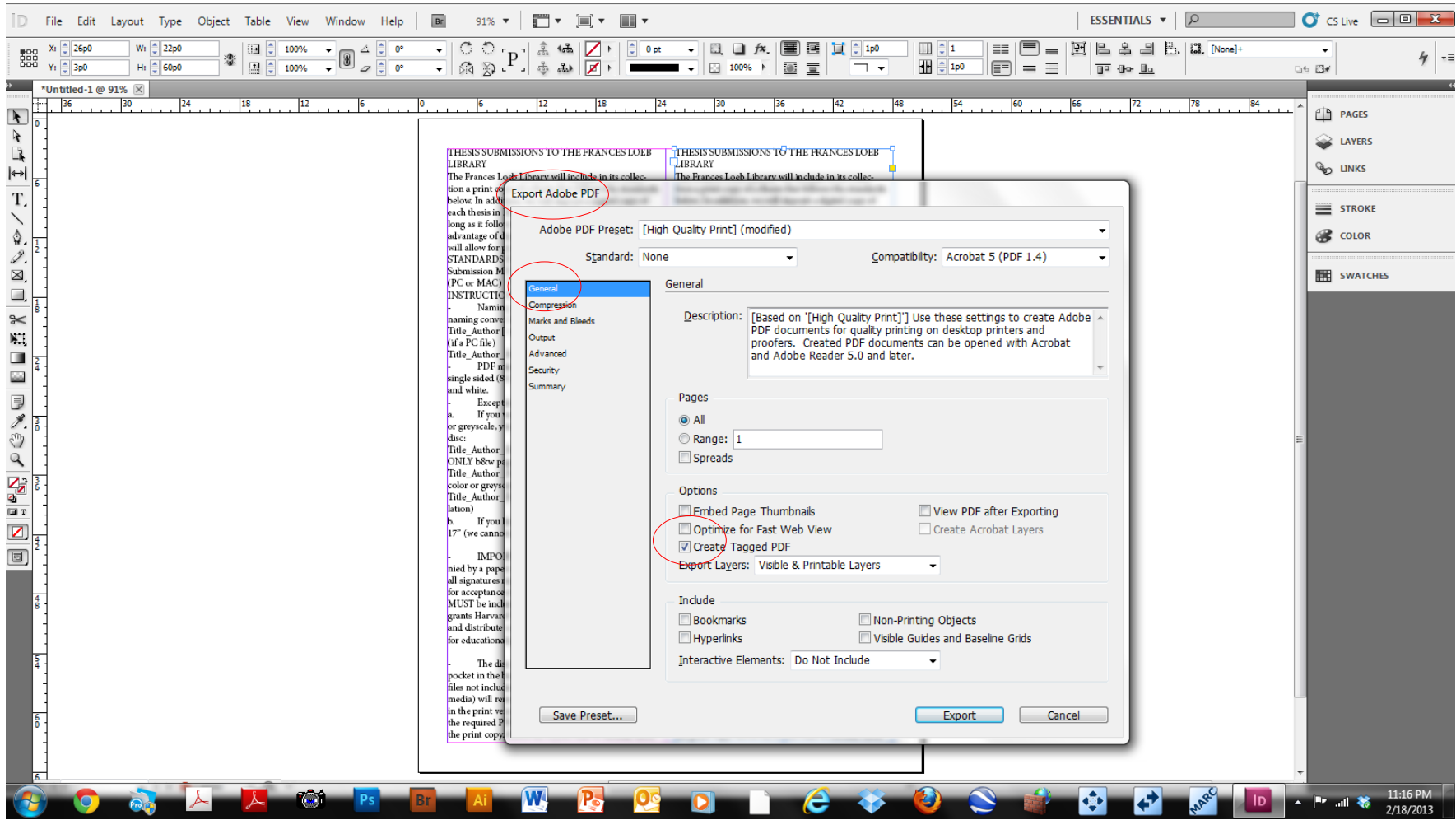A. **If you are using Microsoft Office Word 2010**:
   1. On the File Menu do not set Permissions of any sort.
   2. On the File Menu click "Save As"
   3. Under Save as File Type choose "PDF"
   4. Under Options, make sure "ISO 19005-1 compliant (PDF/A)" is checked; and that "Encrypt document with a password" is not checked. Then hit "OK', and then "Save".

B. **If you are using Adobe InDesign**:

(Possible workflows may include Sketchup to Photoshop to InDesign; or Google Earth Pro to Photoshop to InDesign)
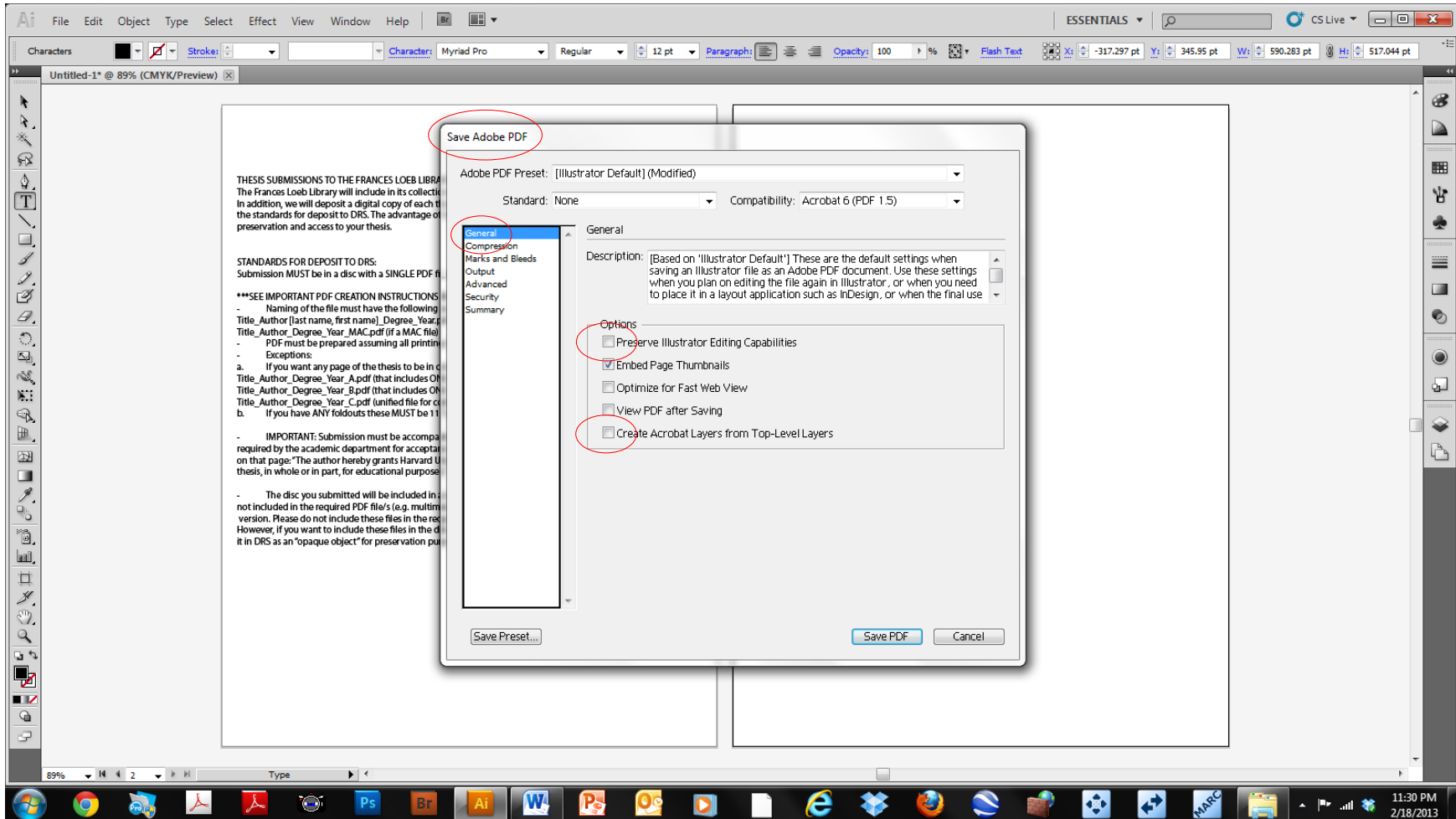
1. In the File Menu click 'Export'.
2. Save as 'Adobe Export PDF (Print)'.
3. In the 'Adobe Export PDF' window, under 'General tab' uncheck 'Optimize for Fast Web View', and check 'Create Tagged PDF'.
4. Make sure no options are checked in the 'Security' tab, and then hit 'Export'.

C. **If you are using Illustrator**:

(Possible workflows may include work done in AutoCAD, Rhino, 3ds Max, and ArcGIS, and edited in Illustrator).

1. Make all edits in Illustrator.
2. In the File menu, Save As 'Adobe PDF'
3. In the 'Save Adobe PDF' window, uncheck 'Preserve Illustrator Editing Capabilities', and also uncheck 'Create Acrobat Layers from Top-Level Layers'.
4. Make sure no options are checked in the 'Security' tab, and the hit Save PDF.

D. If you are using OpenOffice:

1. On the File menu click on 'Export as PDF…'

2. As shown in the screenshot below, in the 'PDF Options' pop-up check 'PDF/A-1a' and then click on the 'Export' button.