



Acrobat for Legal Professionals

The Acrolaw Blog is a resource for lawyers, law firms, paralegals, legal IT pros and anyone interested in the use of Acrobat in the legal community. Rick Borstein, blog author, is a Principal Solutions Consultant with Adobe Systems Incorporated.

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Using Save As to Conform to PDF/A

In my earlier articles on PDF/A, I skipped over one of the easier ways to conform an existing PDF document to PDF/A.

Using *Save As* is perhaps the easiest way to apply the transformations necessary to existing PDFs such as embedding fonts, setting color spaces and the other twenty or so checks that Acrobat can undertake to conform to the PDF/A specification.

In this article, you'll learn how to:

- Use Save As in Acrobat X Pro to conform a non-PDF/A file to PDF/A-1b
- Use Save As in Acrobat 9 Pro to conform a non-PDF/A file to PDF/A-1b



As you might guess, the processes are very similar, but it's a little easier in Acrobat X. My experience has been that Acrobat X is a bit faster and more reliable for conforming operations.

What's the difference between creating a PDF/A file and conforming to PDF/A?

Creating a PDF/A File = Converting directly from an electronic source like Word or Excel to PDF/A

Conforming to PDF/A = Converting an existing PDF document so it meets all the requirements of PDF/A

What "Flavor" of PDF/A should I use for Court Filings?

In my exchanges with US Federal Court officials, they indicated that either PDF/A-1A or PDF/A-1B would be acceptable for eFiling. However, it can be very challenging to conform files to the much stricter PDF/A-1A specification, so you should conform to PDF/A-1B if you have existing PDFs to submit.

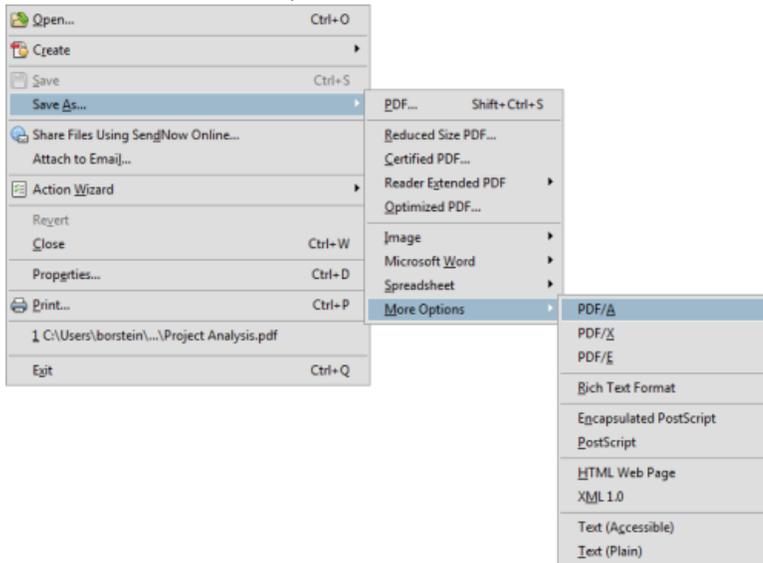
That said, if you are creating PDF from Word or Excel, it is simple matter to create PDF/A-1A files. These "tagged" files are accessible to the visually impaired, so it is a good practice to create PDF/A-1A files if possible. It's a cinch to do using the PDF Makers installed by Acrobat into Office applications.

Using Save As to Conform a PDF to PDF/A-1b in Acrobat X

Follow these steps in Acrobat X . . .

1. Open a PDF file that you wish to conform to PDF/A

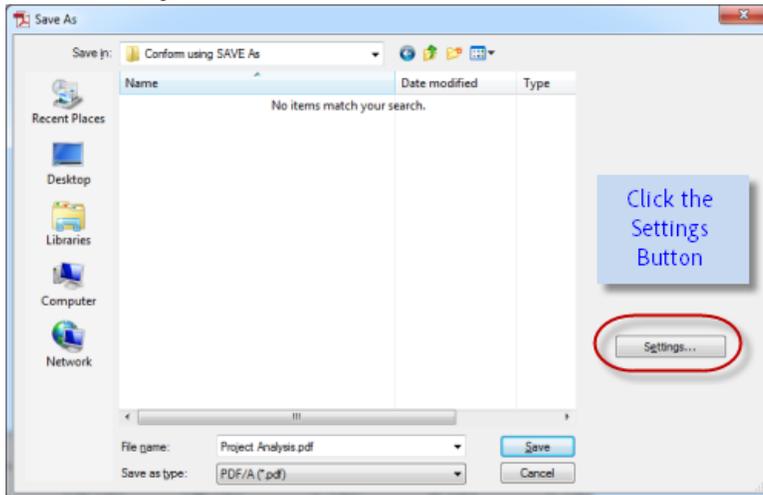
2. Choose File> Save As> More Options> PDF/A



Note: You can also choose File>Save As>PDF, then choose PDF/A from the Save As Type menu

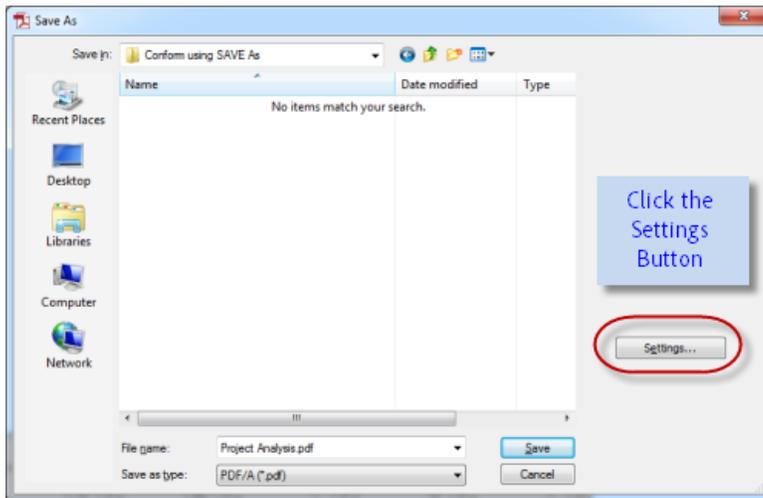
3. The Save As Window appears.

– Click the Settings button



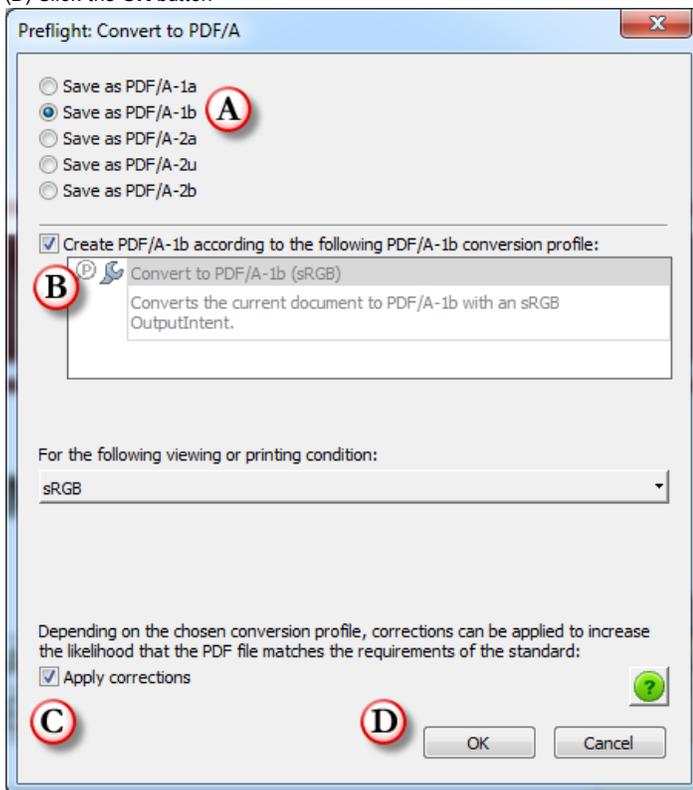
4. The Preflight window appears.

- (A) Choose PDF/A-1b for Federal Court Filings
- (B) Check to create according to a PDF/A-1b profile
- (C) Check "Apply Corrections"



4. The Preflight window appears.

- (A) Choose PDF/A-1b for Federal Court Filings
- (B) Check to create according to a PDF/A-1b profile
- (C) Check "Apply Corrections"
- (D) Click the **OK** button

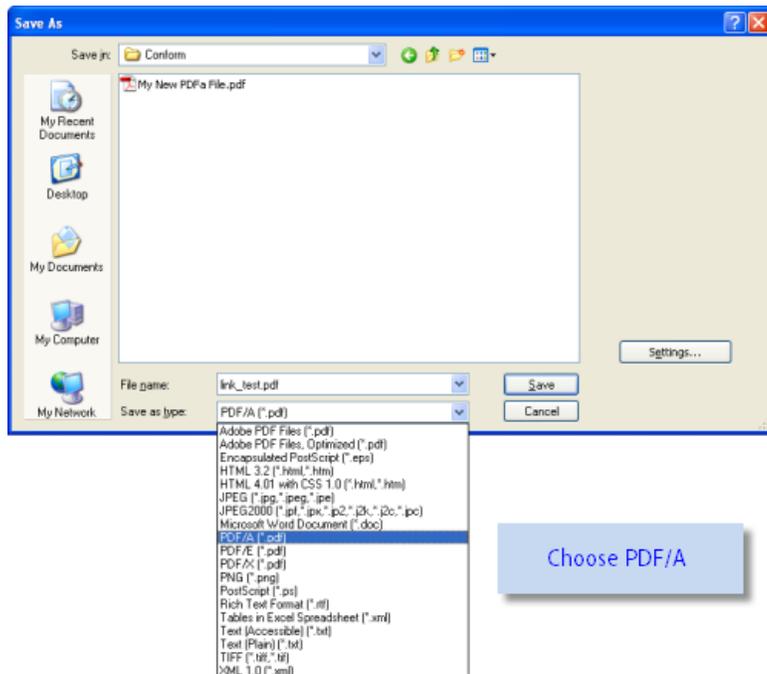


5. Click **OK** again to save and conform the file

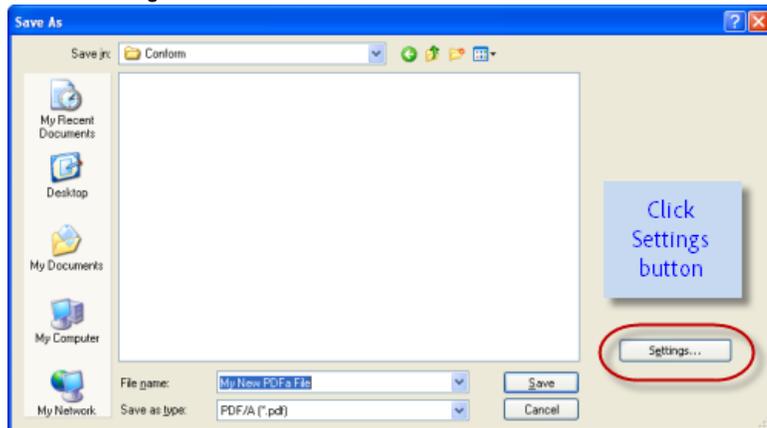
Using Save As to Conform a PDF to PDF/A in Acrobat 9 Pro

Follow these steps in Acrobat X . . .

1. Open a PDF file that you wish to conform to PDF/A
2. Choose File> Save As
3. The Save As Window appears.
 - Choose PDF/A from the Save As type list at the bottom of the window.



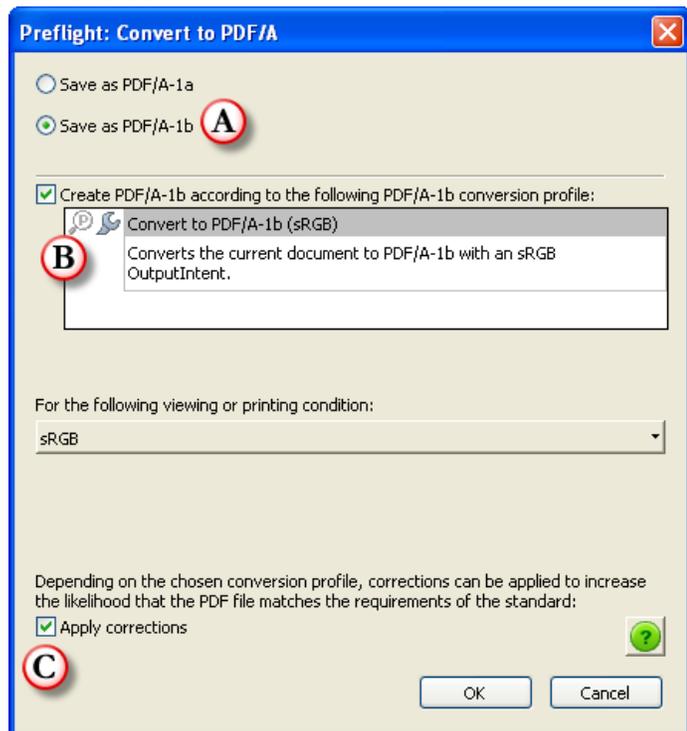
4. Click the **Settings** button in the Save As window



5. The Preflight window appears.

- (A) Choose PDF/A-1b for Federal Court Filings
- (B) Check to create according to a PDF/A-1b profile
- (C) Check "Apply Corrections"

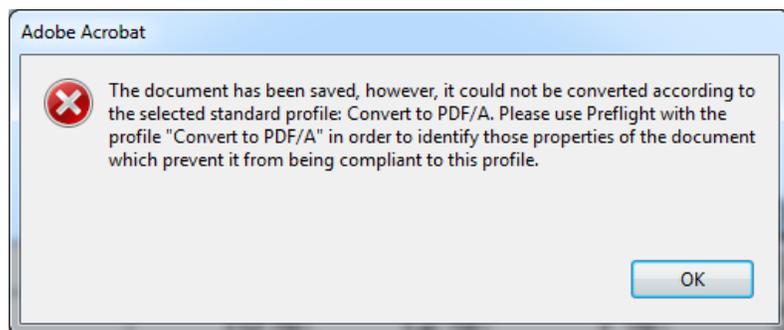
Click the **OK** button



6. Click **OK** again to save and conform the file

What if the file cannot be conformed to PDF/A?

Save As may not be able to conform a file to PDF/A in which case you will see a message similar to this:



There are several issues which could prevent conforming a file to PDF/A-1B:

1. The document requires fonts that you do not have on your system
2. The document uses fonts which have a "Do Not Embed" flag
3. The document has transparent objects
4. The document is damaged
5. The document is a XFA Form created with Adobe LiveCycle Designer

I will be covering fix-ups and workarounds for difficult to conform files in future blog posts..

[Tweet](#)

22 Responses to *Using Save As to Conform to PDF/A*

Pingback: [Update: What You Need to Know About PDF/A ECF Filings in Federal Court | PIT IP Tech Blog](#)

Mariya says:

July 15, 2011 at 2:59 pm

This blog is a treasure, thank you, Rick!

My company has recently switched to using PDF/A for our electronic records only to discover that the Combine Documents tool heavily used by our records coordinators makes PDF/A files non-compliant with the standard. Conforming the merged PDF is not an option since they only have Adobe Standard. I wonder if there is a way around it (some changes in preferences maybe?) apart from using the old Insert Pages option (a real pain when you have 50 attachments to insert). I'll appreciate your advice!

Rick Borstein says:

July 24, 2011 at 11:50 pm

If you want to conform to PDF/A you'll have to have Pro, unless you are willing to print the PDF back to the PDF Printer Driver and lose all your bookmarks.

Pingback: [PDF/A for the long haul | Files That Last](#)

Pingback: [The Basics: "Saving As" PDF/A | PDF Association](#)

Alison says:

February 14, 2012 at 10:35 am

Rick, I am getting that error message that you say you will be addressing in future blog posts, but I can find any "future blog posts" – have you done any more on this? I cannot get documents that have been scanned and OCR'd to conform and sometimes when I do the print to PDFa, it will change up my custom exhibit sticker stamps. I have flattened the custom stamps, but I still can't get a PDFa compliance pass...any suggestions?

Rick Borstein says:

July 19, 2012 at 6:04 pm

Sorry, my job role changed a few months ago and I have had little time to work on this. I do agree that the PDF/A conformance area which we need to redesign to make easier.

Aaron says:

February 7, 2013 at 4:32 pm

Hi Rick. Did anyone ever assume your role or duties here? We are struggling to conform existing PDF's to PDF/a – we are seeing that error message you discussed. Or, is there another avenue of support we could use to get assistance? Thanks!

Rick Borstein says:

February 21, 2013 at 1:31 pm

I'd suggest upgrading to AXI. The PDF/A conformance is killer now!

Michelle says:

March 6, 2012 at 9:31 am

Hi Rick – Have you covered the fix-ups and workarounds for difficult files? PDF/A has become a major problem for us. Our users went through a domain migration, it seems like something must have been lost in their profiles as no one who was able to convert PDFs to PDF/a before can do it now. We are getting the error shown above. We can however convert word docs to PDF/A! We have upgraded to Adobe 9pro and some to xpro with no luck. We have the suggested preflight settings. Preflight shows us tons of errors but won't or cannot fix them! I appreciate any ideas you might have!

Rick Borstein says:

March 18, 2012 at 5:53 pm

I don't have enough details here to help you. You might have your IT folks reinstall Acrobat for you. My guess is that your font set changed and that is why you cannot embed fonts.

Jim says:

March 16, 2012 at 3:06 pm

Very nice guidance! Is there a way to apply this approach to several (numerous) PDF files at once (batch operation)? Also Rick, do you know if there is a generally accepted percentage/ratio that one can use to predicate disk space required when deciding whether to save as PDF/A or PDF? That is, do you know if any comparisons have been done that suggest a PDF/A file is "on average" 25, 50, 200% larger than a "standard" PDF file? Thanks.

Rick Borstein says:

March 18, 2012 at 5:46 pm

There is not standardized guidance on how much larger a file will become when converted to PDF/A. Fonts add size to the file. You can conform in bulk using Actions in Acrobat Pro.

Pingback: [Save Quickly to PDF/A with Keyboard Shortcuts « Oregon Law Practice Management](#)

Renee Russo says:

January 31, 2013 at 9:35 pm

Hi Rick,

I have to convert the Crystal reports in an old Oracle Client-Server application to PDF/A files. I am able to export these reports from the system to .rpt files (Crystal Report version 7 was installed in the server), and I am able to export the .rpt files through Crystal Reports XI Release 2 to PDF files; However, when I open the PDF files in Adobe Acrobat Pro and save them to PDF/A files, some work, but some throws me the error that shows in your instruction above "could not be converted according to the selected standard profile...." I run the preflight Analysis and Fixes. It shows me the errors, but I don't know where to fix. Could you give me any advice? Thanks a lot.

Rick Borstein says:

February 26, 2013 at 1:08 pm

I'd suggest trying Acrobat XI. PDF/A conformance is a lot easier in the new version. Depending how the authoring app created the files, the only workflow may be to reprint them to the PDF print driver using the PDF/A option.

Randy Vehar says:

April 25, 2013 at 1:24 pm

How can I tell if a PDF document has correctly converted to a PDF/A-1b?

Rick Borstein says:

June 1, 2013 at 1:49 am

In Acrobat X and XI, when you open a file which purports to be PDF/A, the Standards panel will also appear at the left. Click on it and choose Verify Compliance.

aubrey says:

May 25, 2013 at 12:59 am

Hi Rick:

I have the Acrobat 9 Pro. Received a PDF/A mode document recently. Please advise how I can convert back to a normal one so I can delete some pages and do highlight for my personal reading? Thanks!

Rick Borstein says:

June 1, 2013 at 1:23 am

You'll need to remove the PDF/A properties of the file to do that. You can do that using Preflight in Acrobat 9. This is much easier in Acrobat XI where you only have to click the button in the toolbar.

Julio Matamoros says:

June 3, 2013 at 7:56 pm

How can I tell if a document is PDF -a compliant?

Rick Borstein says:

June 6, 2013 at 4:58 pm

Take a look at the Standards panel. If you actually want to validate the file, you will need Acrobat Pro.

 [Comments \(22\)](#)

Created
May 6, 2011

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