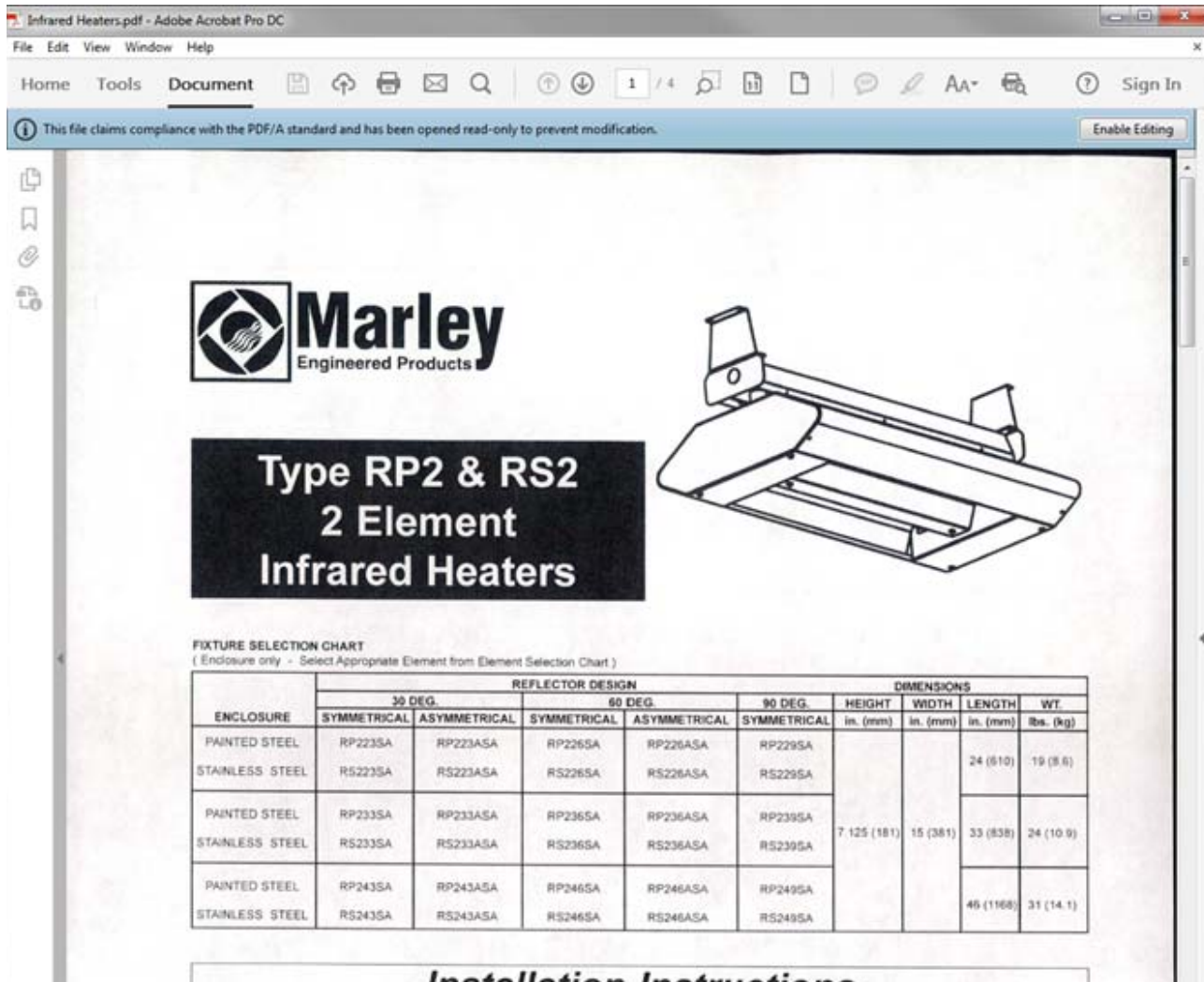# MERIDIAN DOCUMENT MANAGEMENT SYSTEM

Searchable PDF/a Files

This manual includes step by step instructions on how to create and modify searchable PDF/a files for long term archiving in the Meridian document management system.

MICHIGAN STATE UNIVERSITY

Facilities Information Services
1147 Chestnut Rd, Room 101
Infrastructure Planning & Facilities
Michigan State University
East Lansing, MI 48824-1215

For Assistance, contact::

FIS Support
(517) 353-3434
fissupport@ipf.msu.edu

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Table of Contents

1   Searchable PDF/a files

- PDF/a is the government accepted standard that is specialized for the digital preservation of electronic documents.

- PDF/a differs from PDF by omitting features ill-suited to long-term archiving, such as special fonts, hyper-links, etc., which will make the files unable to be opened as future versions of adobe acrobat or other pdf readers become available.

- Searchable PDFs are created using OCR (Optical Character Recognition), which is the conversion of scanned images into machine-encoded text. This process allows users to search for keywords in the file.

- The Kodak Scanners in the FIS department and the large format OCE scanner are set up to scan into searchable PDF/a format.

- There are different methods for creating a searchable PDF/a file depending on the original file type of your document.

  1. using a SCANNED file (paper that was scanned into an electronic format)
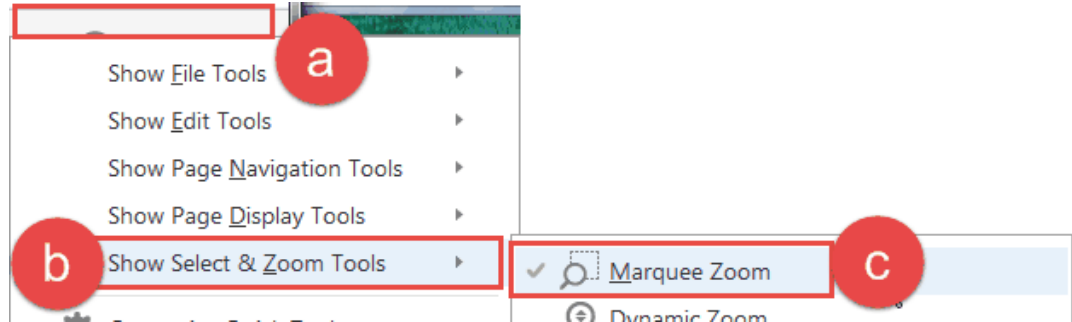 2. using an ELECTRONIC file (file originally created on the computer)

1.1   Shortcuts on your Toolbar
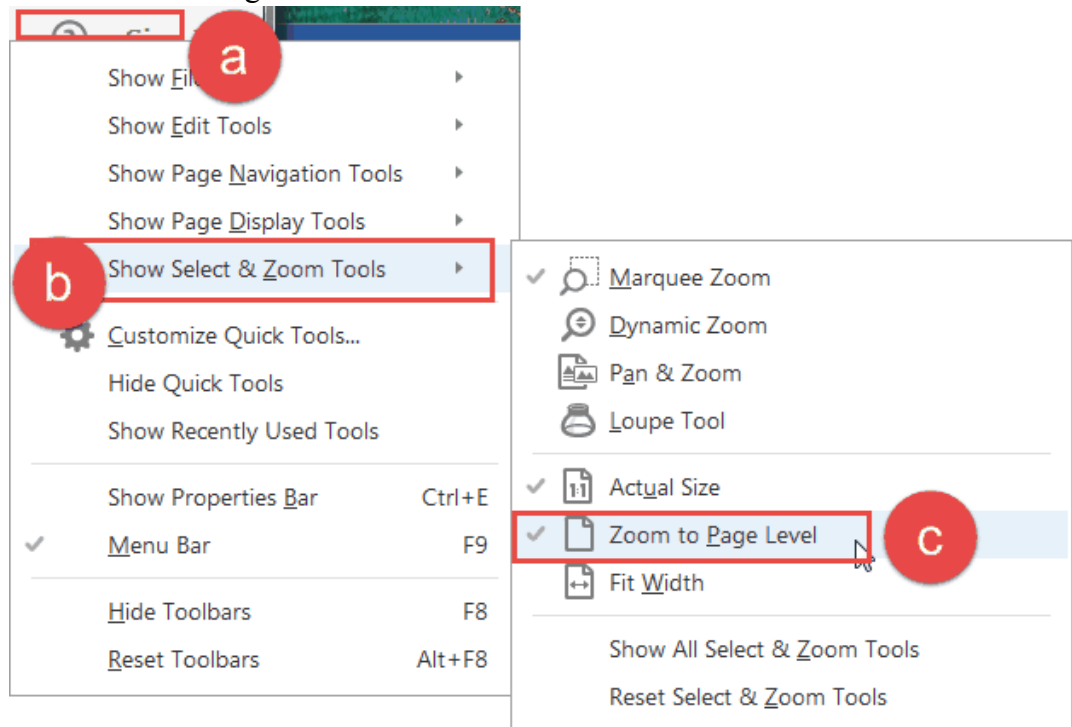
Steps to add toolbar shortcuts

  1. Marquee Zoom

  2. Fit Page to Screen

 3. Preflight (PDF/a creation)

  4. Text Recognition (OCR)
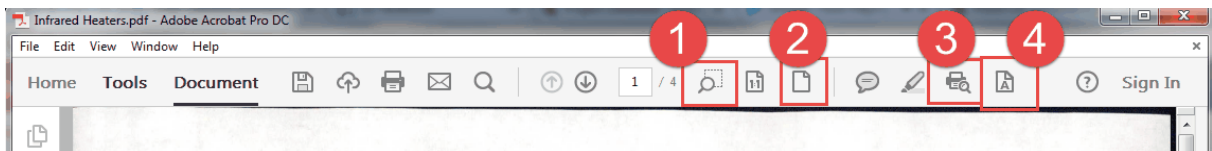
1. ⬚🔍 Marquee Zoom
   a. Right-Click on the Toolbar
   b. Select 'Show Select & Zoom Tools'
   c. Select 'Marquee Zoom'.
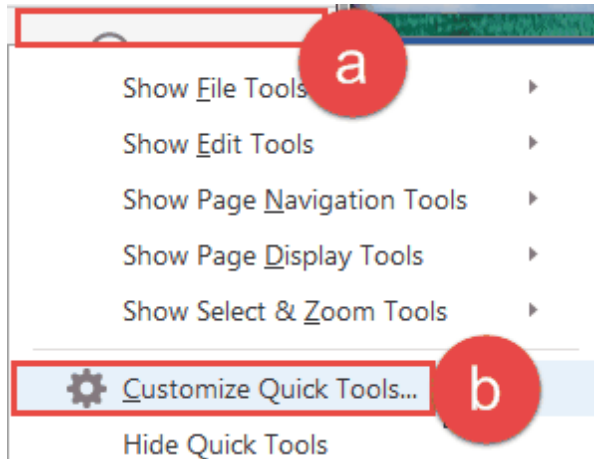

2. 📄 Fit Page to Screen
   a. Right-Click on the Toolbar
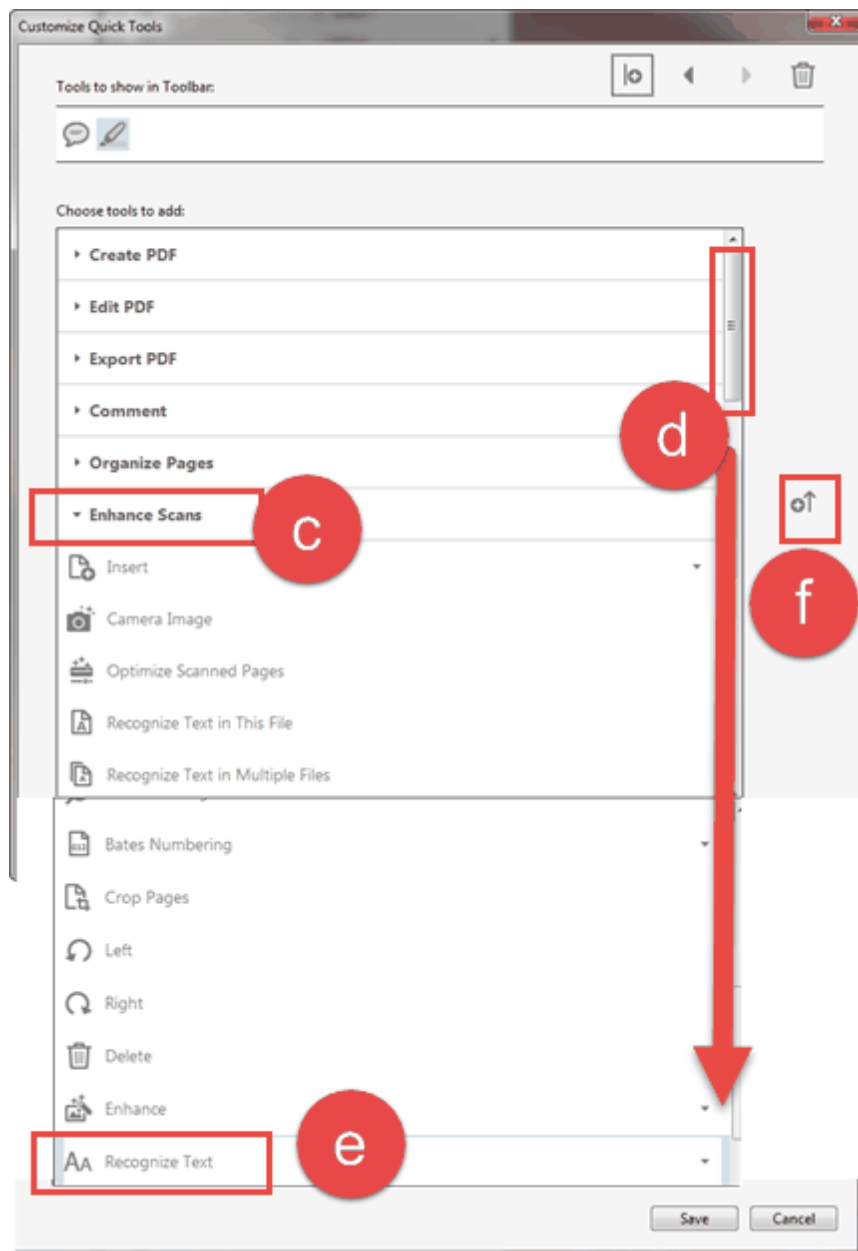   b. Select 'Show Select & Zoom Tools'
   c. Select "Zoom to Page Level'

3. Preflight (PDF/a creation) and AA▾ Text Recognition (OCR)
   a. Right-Click on the Toolbar
   b. Select 'Customize Quick Tools…'

   c. Select 'Enhance Scans'
   d. Scroll down to the end of that section
   e. Select 'Recognize Text'
   f. Click the add button to the right of scroll bar.

g. Scroll down even more
h. Click on 'PDF Standards'
i. Select 'Preflight'
j. Click the add button to the right of the scroll bar
k. Make sure your selections are shown at the top
l. Click 'Save'
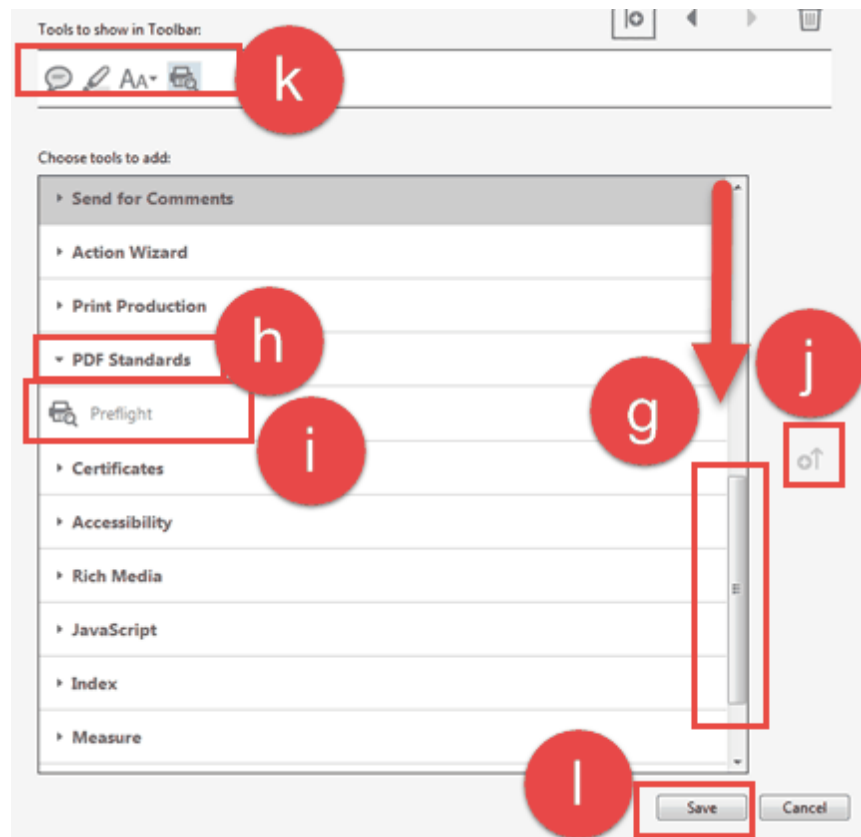
1.2   Creating a searchable PDF/a file

To create a searchable PDF/a from a <u>scanned</u> image, you will have to:

- Convert or print the file to a PDF if necessary.
- Open the file.
- Run OCR
- Run Preflight

To create a searchable PDF/a from an <u>electronic</u> file, you will have to either:

- Open the file.
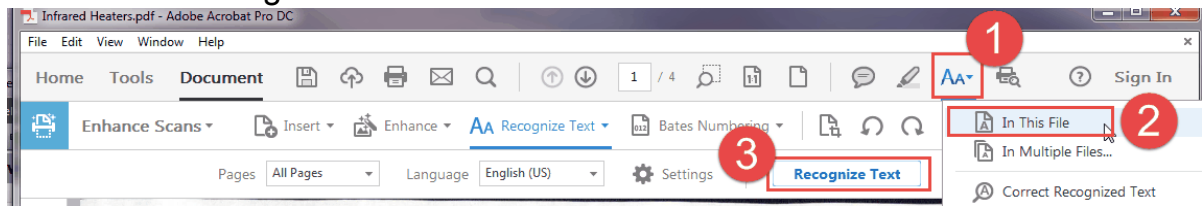- Print directly to a PDF/a

or

- Convert or print the file to a PDF
- Open the file.
- Run Preflight

1.2.1 OCR
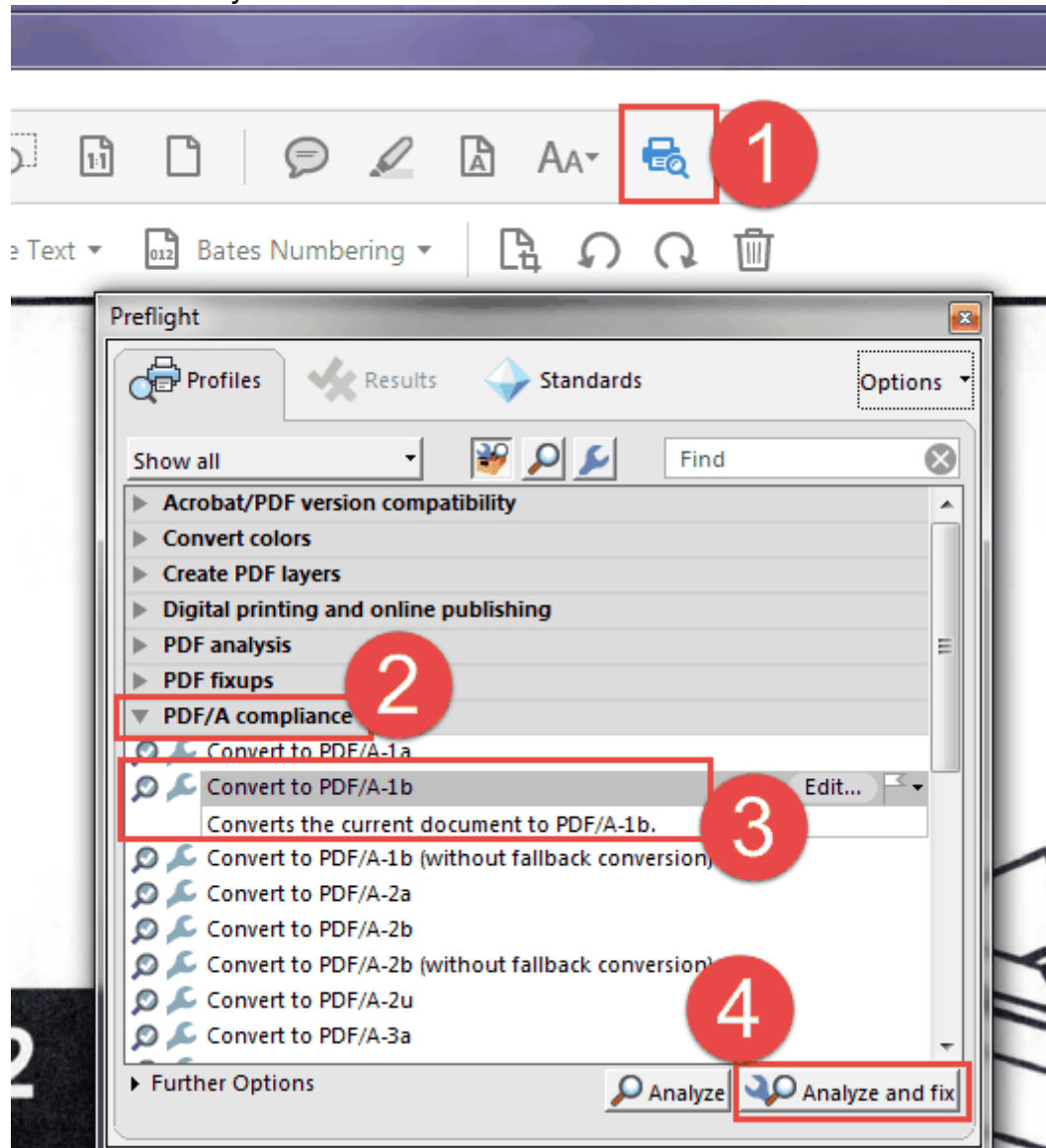
To create a searchable file:
1. Click on 'Aᴀ'.
2. Select 'In this File'.
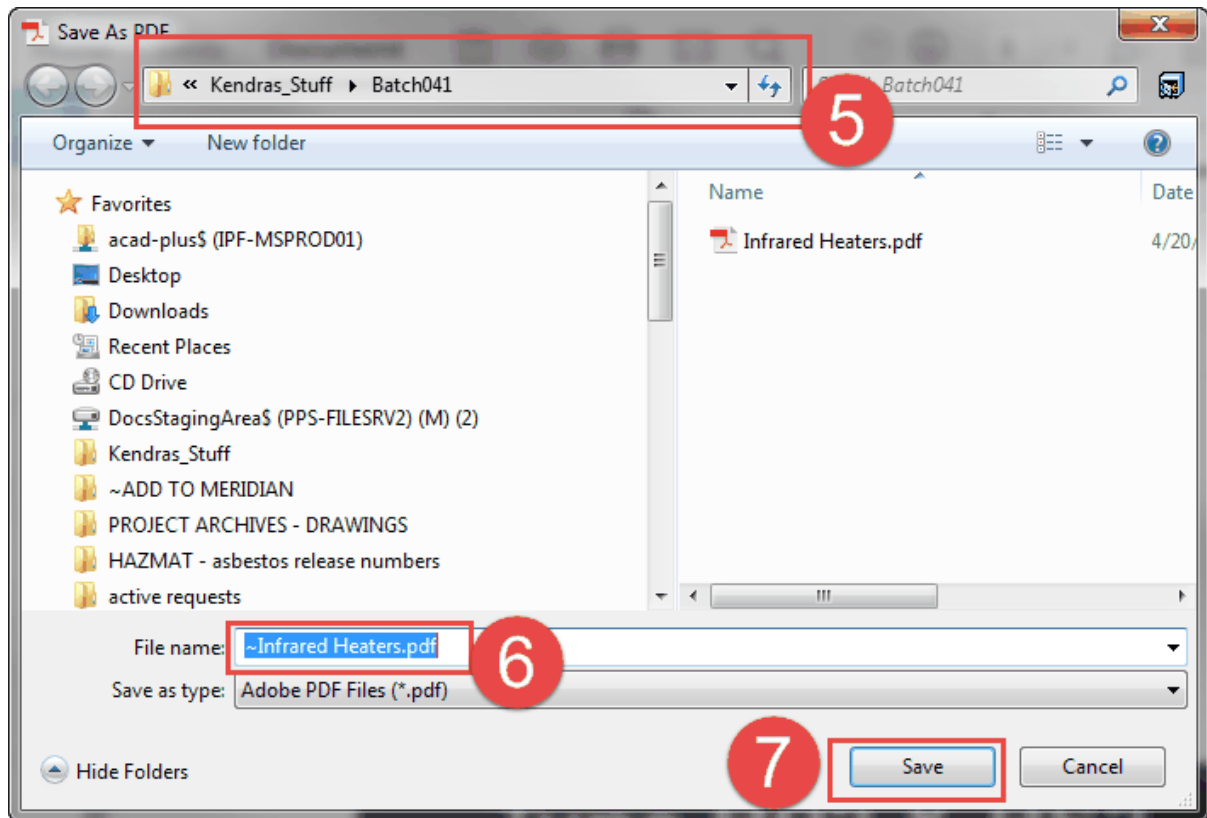3. Click on 'Recognize Text.

1.2.2 Preflight

Creating the PDF/a:

1. Click on the Preflight icon
2. Open 'PDF/A compliance'
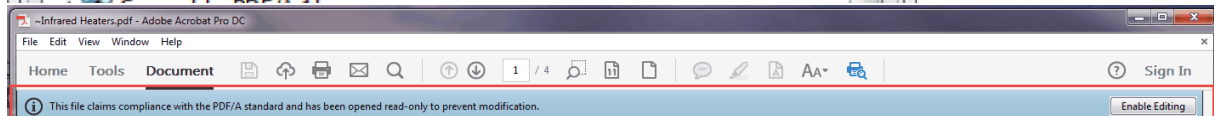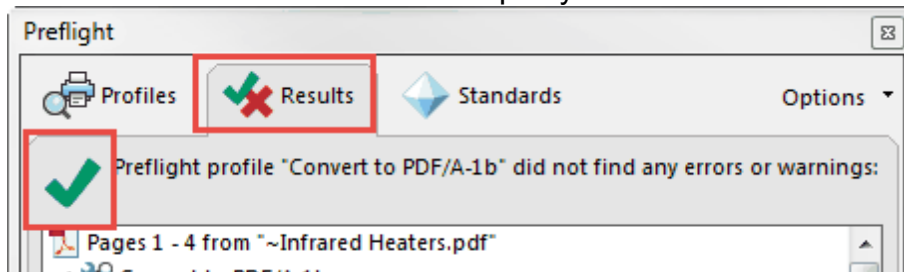3. Select 'Convert to PDF/A-1b'
4. Click on 'Analyze and fix'

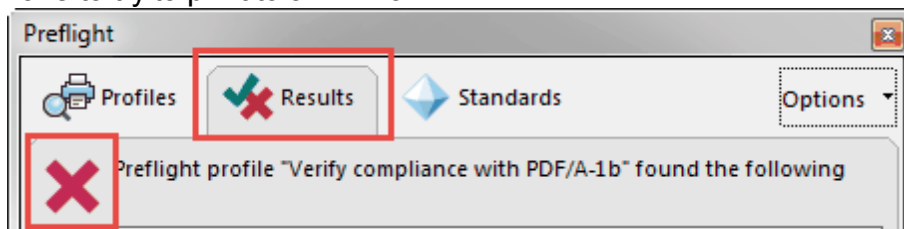You will be prompted to save the file:
5. Select the location
6. change the file name in case you still need the original file (suggestion: add '~' to the beginning of the file name)
7. Click 'Save'

If it worked, you will see a green check mark in the preflight results dialog box. You will also see the PDF/A ribbon on the top of your document.
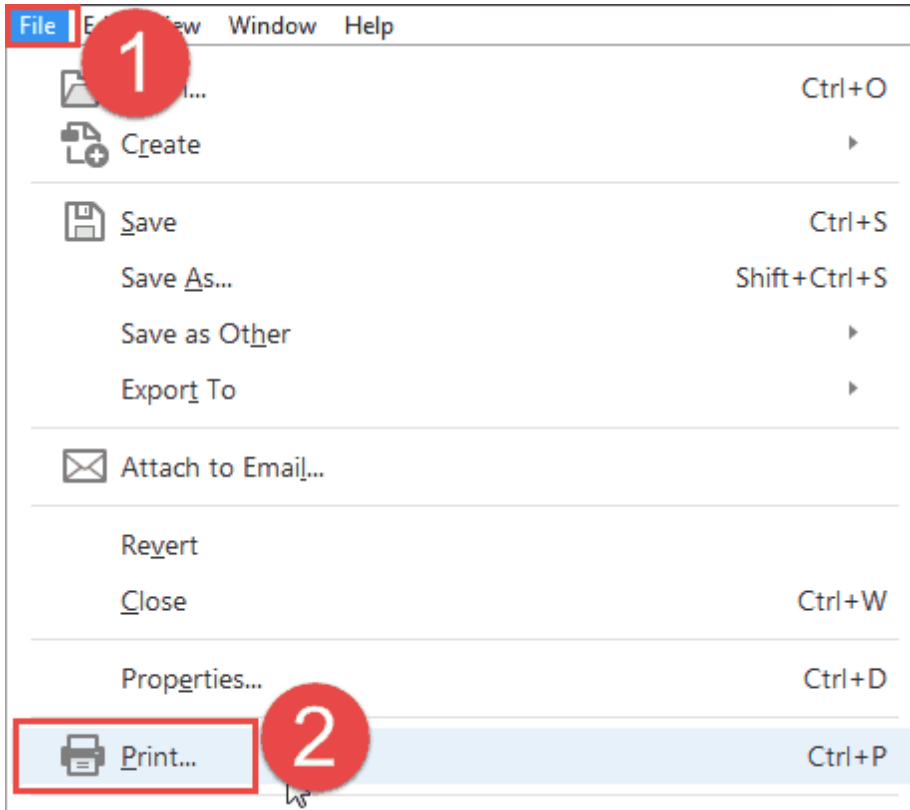

If Problems were found and you see a red X in the preflight results dialog box. You may have to try to print to a PDF/a.
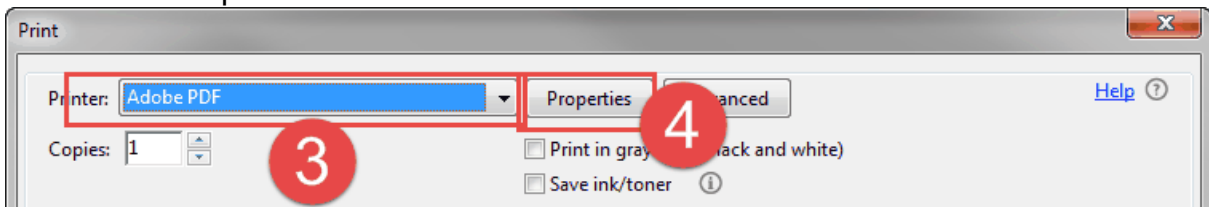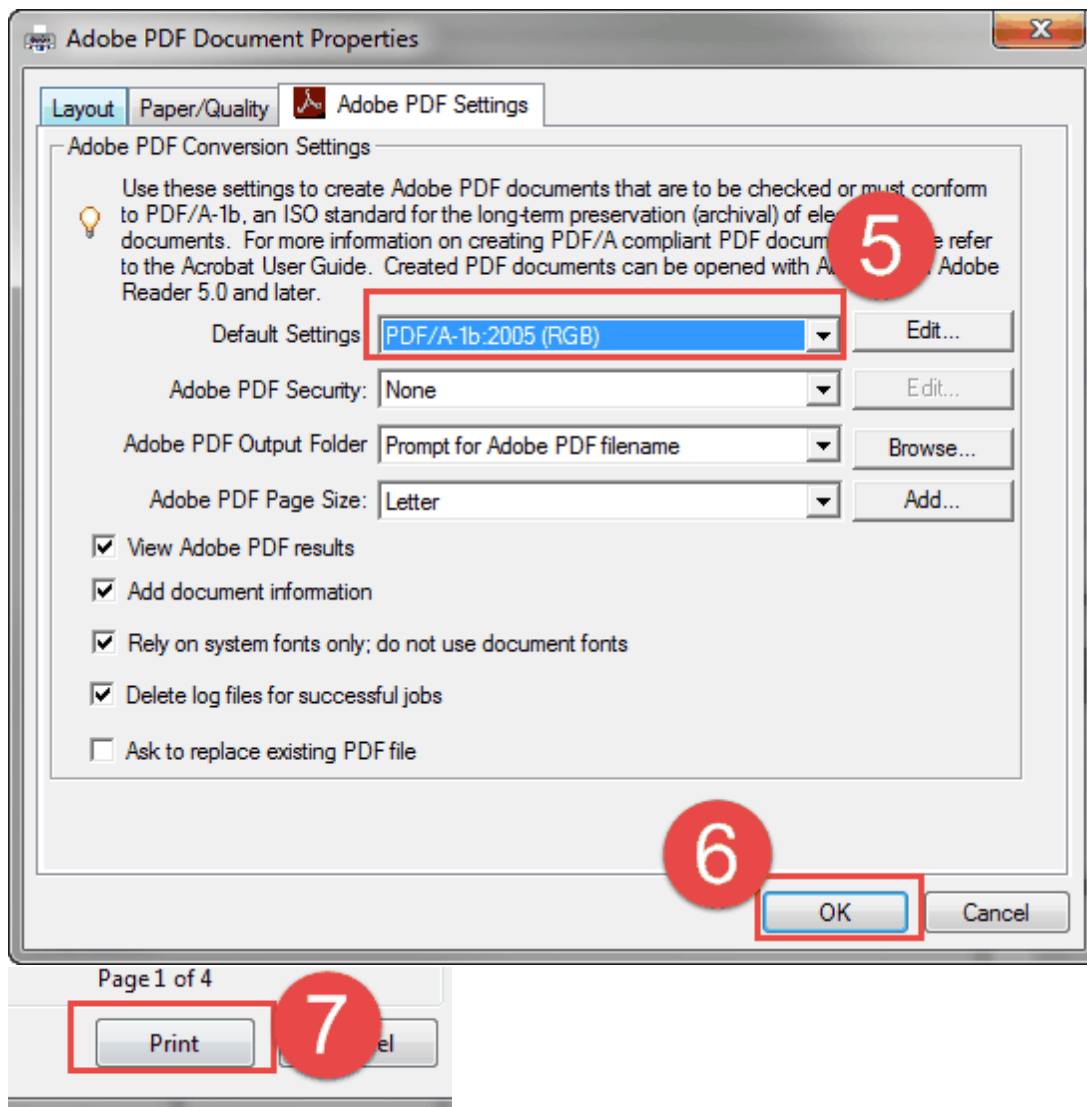
1.2.3   Printing to PDF/a

1. Open the 'File' menu
2. Select 'Print...'

3. Change the Printer to 'Adobe PDF'
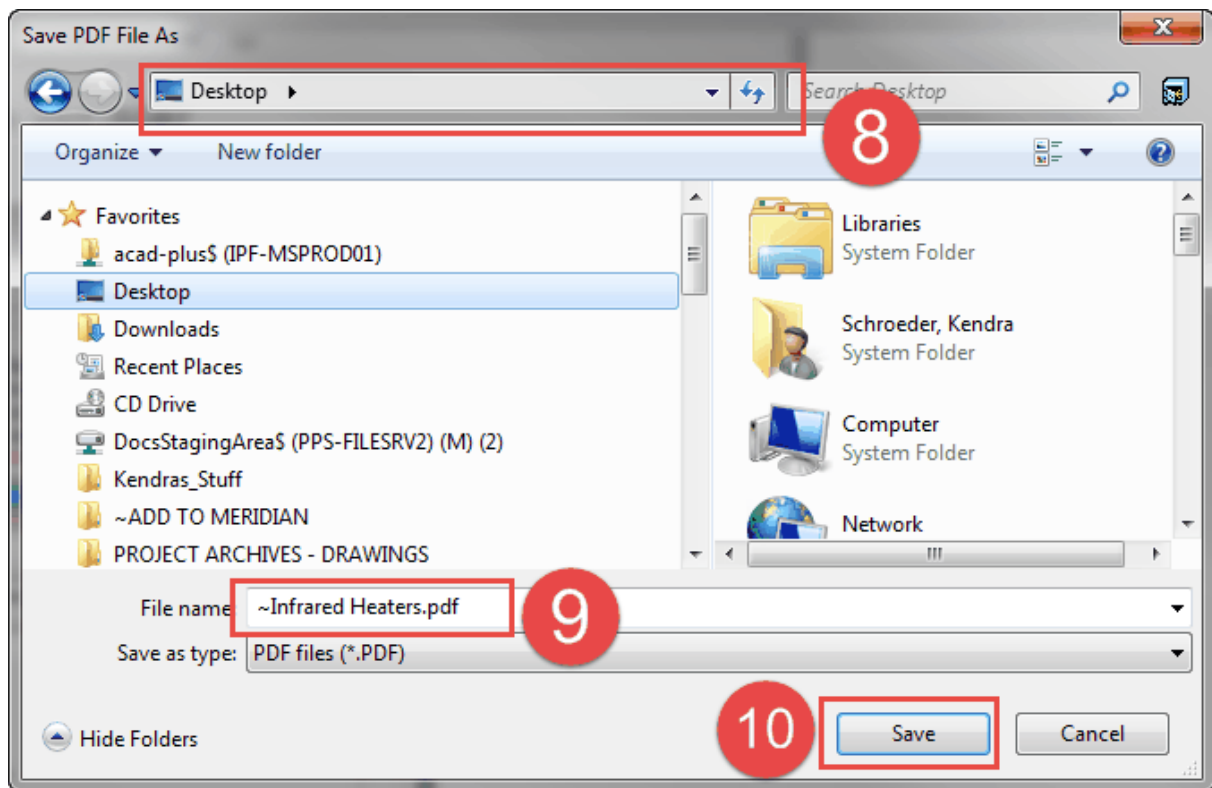4. Click on 'Properties'

5. Change the 'Default Settings' to 'PDF/A-1b: 2005 (RGB)'
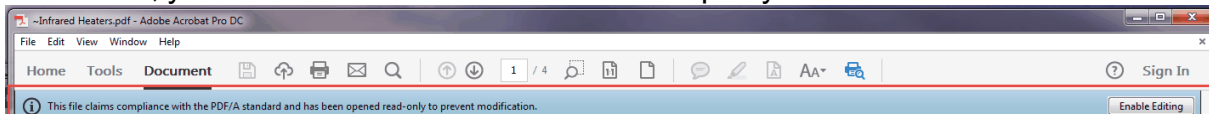6. Click 'OK'
7. Click 'Print'

You will be prompted to save the file:

8. Select the location
9. change the file name in case you still need the original file (suggestion: add '~' to the beginning of the file name)
10. Click 'Save'

If it worked, you will see the PDF/A ribbon on the top of your document.

1.3   Modifying PDF/a documents

If you need to modify a PDF/a file in anyway:
1. Click 'Enable Editing'
2. Make any changes to the document
3. Repeat all the steps to OCR and PDF/a the file