

Converting a Microsoft Word Document to a PDF/A File

Digital Stewardship Curriculum

When saving documents created in Microsoft Word, it is best to convert to a sustainable format. Currently, PDF/A, a standardized version of PDF, is the best option for long term preservation. There are a few steps involved in the conversion process. This document will cover the following steps in Microsoft Word 10 in a Windows 10 environment:

- Make sure that the document properties (metadata) are accurate.
- Embed all of the document fonts.
- Make sure the PDF is not password protected.
- Ensure that the security settings allow printing.
- Save the document in PDF/A format.

How to check and edit document properties in Microsoft Word

To check document properties in Microsoft Word 2010:

1. Select the **File** tab.
2. Select **Info** to view the document properties.
3. On the right-side panel view **Properties**.
4. Click **Show All Properties**.
5. Make sure that all of the information in the properties window is correct. You may want to add an Author, Title, Company, or other related metadata.
6. Click the **File** tab to return to your document. Changes are saved automatically.

How to embed fonts in Microsoft Word

If the fonts in your document are not embedded and they are not available on the document reader's computer, the program displaying the PDF file will make a "best guess" as to which fonts to use instead. Sometimes this can create significant differences between your original intent and what readers see on their screens.

To embed fonts in Microsoft Word 2010:

1. If possible, the document should utilize TrueType fonts.
2. In the **File** menu, click on **Options**.

3. Choose **Save** on the left sidebar.
4. Check the box next to **Embed fonts in the file**.
5. Make sure that **Do not embed common system fonts** is NOT checked.
6. Click the **OK** button.
7. Save the document.

*Embedded fonts Microsoft Word for Mac:

Microsoft Word 2008 and later on a Mac OS/X computer will automatically embed your fonts while converting your document to a PDF file.

How to save a document in PDF/A format using Microsoft Word

To create a PDF/A document using Microsoft Word 2010:

1. Click **File** and select **Save As**.
2. Select .PDF from dropdown menu.
3. Click the **Options** button.
4. In the **Options** window select the check box for **ISO 19005-1 Compliant (PDF/A)**.
5. Click **OK** to return to the Save As window.
6. Click the **Save** button to save the file in PDF/A format.

To create a PDF/A document using Microsoft Word for Mac:

Unfortunately, Microsoft Office for Mac does not include a feature to save as a PDF/A. If Adobe Acrobat is available, use the following method on Word:mac 2011:

1. Click **File** and select **Print**.
2. Click and hold the **PDF** button on the bottom left of the window until a menu appears.
3. Select **Save as Adobe PDF**. A "Save as Adobe PDF" pop-up box will appear.
4. From the "Adobe PDF Settings" drop down menu, choose **PDF/A**, **PDF/A-1b-2005 (CMYK)**, or **PDF/A-1b-2005 (RGB)**. Depending on your version of Acrobat, these options may vary slightly. As long as your choice has the PDF/A in it, you should be okay.
5. Click the **Continue** button.
6. **Save** the document.

Note: If you just hit PDF in the Print Menu or choose Save as PDF, your PDF will be created using Apple's PDF generator which does not include a PDF/A option.