

## PDF/A is a Requirement for SharePoint Applications

### Meaningful Combination

The combination of PDF/A technology and SharePoint provides enterprises with the advantage of an automated archiving solution, which gives a seamless technical realization of legal or corporate regulations. Dr. Hans Bärffuss explains advantages of long-term archiving of documents in PDF/A format and describes the resulting benefits there of based on practical examples.

The document format plays an important role, because documents can live longer than the creating, managing and archiving systems.

The SharePoint platform has established itself quite successfully in many organizations, where it improves productivity and the collaboration of „information workers“. SharePoint applications manage the document lifecycle in organizations from creation to storage. The document format plays an important role in this, because documents can surpass the lifetime of the creation, manipulation and archiving systems used. As such, the format must be open, documented, not proprietary and standardized. An open format is more economical in the long run than open platforms and applications (Open Source).

This may be one of the reasons for the high level of acceptance of SharePoint and Microsoft Office.

#### Appropriate Formats for the Lifecycles

But not every format is equally suited for the different phases of a document lifecycle: ODF and OOXML are recommended for the phase of the „working document“ whereas PDF/A is a „must“ for the „final document“. Consequently, the document must be converted from ODF or OOXML to PDF/A at the time it transitions from one phase to the other. For this task, there are professional Document Converter Service

applications, which are integrated on top of SharePoint. With the help of the SharePoint platform, these applications automate the conversion process and they ensure that text searches of PDF/A documents will be transparent to the user.

#### PDF/A Satisfies Important Requirements

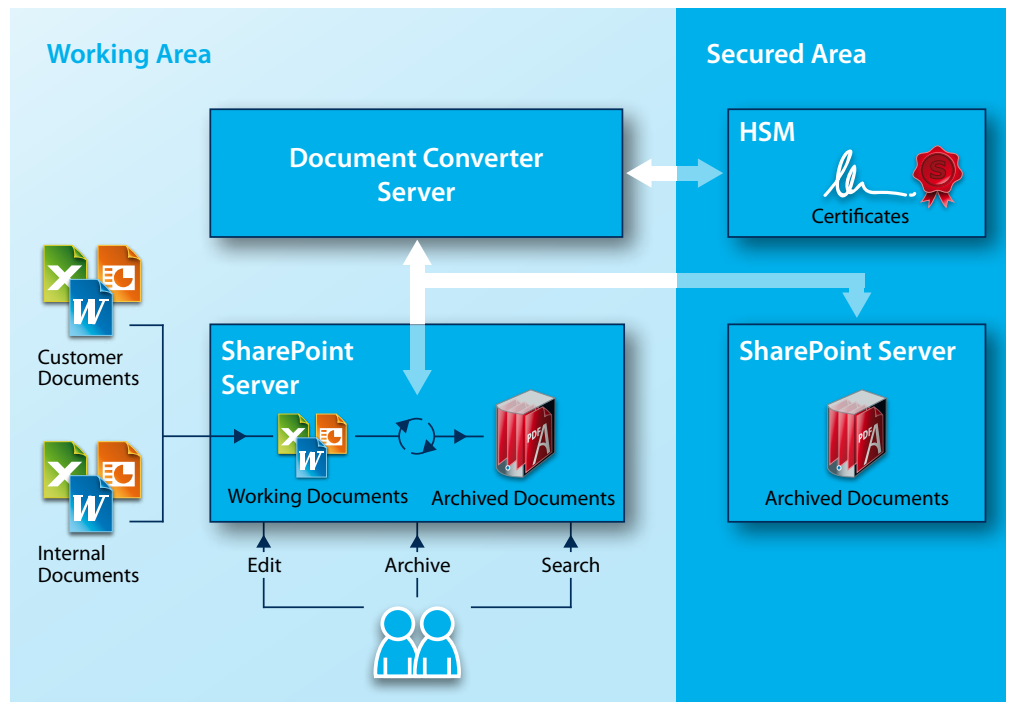
PDF/A satisfies all important requirements of archivists such as static content, predictable and true visual reproducibility of documents regardless of the platform and software; as well as no references to external source, free of encryption and patent rights, searchability, embedding of metadata and digital signatures and more. The vision of „digital paper“ finally came true with PDF/A. It is the same properties of PDF/A and the hard work of many volunteers, including the initiation of the PDF/A Competence Center, which have made PDF/A to the de-facto-standard for archiving. The proof can be found with the many recommendations, guidelines and legal requirements of public authorities and governments in many countries around the globe.

To guarantee an impeccable image of the document layout, the Document Converter Service requires making use of the native office

[www.pdf-tools.com](http://www.pdf-tools.com)

Dr. Hans Bärffuss is the founder and CEO of PDF Tools AG, an internationally successful software development and sales company. He represents the Swiss Standards Association at the ISO and actively helps with the standardization of file formats and digital signatures. He is also a founding member of the PDF/A Competence Center, an organization with the objective of promoting the ISO standards and PDF/A. By today, the organization counts more than 100 members, including major companies such as Adobe, Kofax, Nuance and T-Systems. Dr. Hans Bärffuss is the Chairman of the Swiss Chapter, speaker at numerous conferences and seminars and publishes articles on the subject of digital documents.





applications. For ODF this is Open-Office and for OOXML the corresponding Microsoft Office applications. A study by the Fraunhofer FOKUS Institute has shown that the interoperability between ODF and OOXML can in many cases be very difficult if not impossible. Ambiguities in the description of the standards result in many cases in unpredictable representations of the layout.

#### Take Advantage of Both Sides

Many organizations have already implemented Document Converter Service solutions, such as the largest life insurance company in Switzerland with over 700 insurance consultants in over 40 agencies. The scenario is this: Microsoft Office documents from business processes – company-internal as well as customer documents – are managed and archived in SharePoint Server.

In the past, TIFF was used as file format for archiving. The company switched to PDF/A in order to make the documents searchable, to apply digital signatures and to guarantee traceability. At the completion of the business case, the documents are converted to the PDF/A format and metadata is added prior to storing them in the archive. The users control the conversion of the documents directly from within SharePoint where they can access the PDF/A documents from the standard user interface. At the same time, documents are replicated into an autonomous and robust long-term archive – also based on SharePoint – which protects the documents from unauthorized access. A digital signature is applied to ensure the authenticity of the documents and to prevent these documents from subsequent changes.

Document Converter applications hosted on SharePoint automate the conversion process by means of the SharePoint platform and ensure free-text search is supported for PDF/A documents.

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