

Depositing Meeting Records in Digital Form at Friends Historical Library or the Haverford College Quaker Collection

Although we continue to recommend maintaining at least one hard copy, some Quaker Meetings may choose to deposit their records in the archives at their Repository in digital form. The Libraries will put these digital files online, and will provide access through Tripod, our online bibliographic catalogue. Meetings may also link to these records through their own site(s) using a permanent url which we can provide on request. While these files will be difficult to find using a search engine like Google, meetings submit their electronic records with the understanding that access is unmediated. As they have in the past, the Libraries will continue to accept regular deposits of meeting records on paper.

To deposit digital files, the following conditions must be met:

- All files must be in PDF/A-1b format
This format is the internationally accepted standard for long term preservation. These files are completely self-contained and we expect them to be readable for the foreseeable future.
- It is strongly recommended that the files be named using the name of the Meeting and the year(s), ie. Wilmington_2001.pdf
- Minutes must be complete for a single or multiple calendar year(s), ie. 2006 1mo.-2008 12 mo. is fine, but 2006 7mo.-2008 6mo. is not.
- Minutes must be in approved -- not draft -- form, but may include all of the associated reports and other documents.
- Newsletters in digital form must include all of the issues from a complete calendar or multiple complete calendar years.
- Vital records may be accepted in partial year accumulations.

Before depositing PDF/A-1b compliant meeting records, it is strongly recommended that Clerks send a sample file for verification.

When the files are ready for deposit, they may be attached to an email message with “[name of the meeting] Records” in the message line and containing the following information in the body:

- Name of Meeting
- Type of record [title]
- Date Span [coverage temporal]
- Place of Production [coverage spatial]

The email address of Friends Historical Library is friends@swarthmore.edu and Haverford College Quaker Collection is hc-special@haverford.edu. The Library will notify the meeting by return email when the digital files have been processed and are available online. The meeting should keep a copy of the original digital file at least until this confirmation is received and they have been able to access the files and check them.

Digital files should be sent only to the Library that holds the rest of the meeting's records. Any questions concerning the location of the meeting's records or any other concern may be directed to the email addresses above.

To be archived electronically, all documents should be saved as a pdf file, conforming to the [pdf/A-1b standards](#).

Why pdf/A-1b?

A PDF/A-1b document will look the same in 25 years as it does today. And because the standard is ISO19005 compliant, it will also be able to be read in 25 years, unlike most other text-based documents created with proprietary software.

The description in wikipedia (<http://en.wikipedia.org/wiki/PDF/A>) is one of the most concise:

The Standard does not define an archiving strategy or the goals of an archiving system. It identifies a "profile" for electronic documents that ensures the documents can be reproduced the exact same way in years to come. A key element to this reproducibility is the requirement for PDF/A documents to be 100 % self-contained. All of the information necessary for displaying the document in the same manner every time is embedded in the file. This includes, but is not limited to, all content (text, raster images and vector graphics), fonts, and color information. A PDF/A document is not permitted to be reliant on information from external sources (e.g. font programs and hyperlinks).

Other key elements to PDF/A compatibility include:

- *Audio and video content are forbidden.*
- *JavaScript and executable file launches are prohibited.*
- *All fonts must be embedded and also must be legally embeddable for unlimited, universal rendering. This also applies to the so-called PostScript standard fonts such as Times or Helvetica.*
- *Colorspaces specified in a device-independent manner.*
- *Encryption is disallowed.*
- *Use of standards-based metadata is mandated.*

For more information, see: <http://www.pdf-tools.com/public/downloads/whitepapers/whitepaper-pdfa.pdf>

How can I do it?

****Before you start, save two copies of the minutes so if you make a mistake, you will always have an untouched copy.**


WINDOWS COMPUTERS (Windows Server 2003; Windows Vista; Windows XP Service Pack 2, Windows 2007)

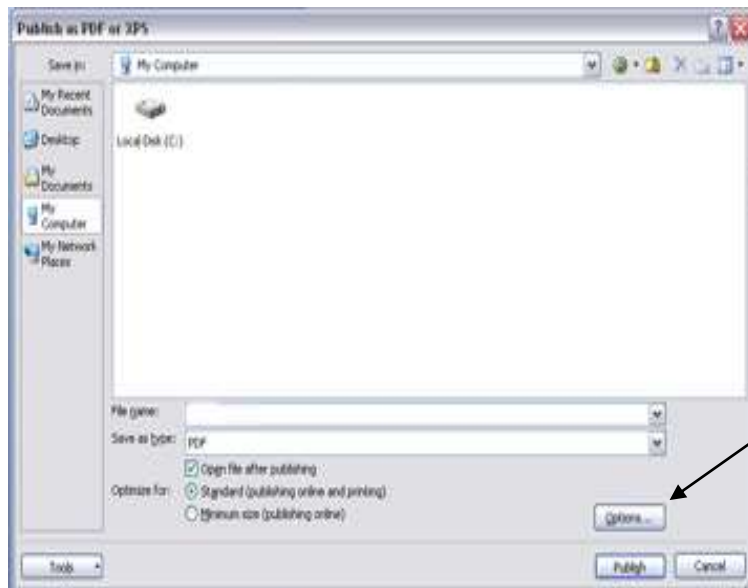


Microsoft Word (2007) allows you to save word documents as compliant pdf/a documents if you download the pdf plug-in (free) from Microsoft:

<http://www.microsoft.com/downloads/details.aspx?FamilyId=F1FC413C-6D89-4F15-991B-63B07BA5F2E5&displaylang=en>

After installing the plug-in:

1. Click the **Microsoft Office Button**  , point to the arrow next to **Save As**, and then click **PDF or XPS**.
2. In the **File Name** list, type or select a name for the document.
3. In the **Save as type** list, click **PDF**.
4. If you want to open the file immediately after saving it, select the **Open file after publishing** check box. This check box is available only if you have a PDF reader installed on your computer.
5. Next to **Optimize for**: click **Standard (publishing online and printing)**, then, on the same screen click **Options**



6. Check the following:

Page range: All

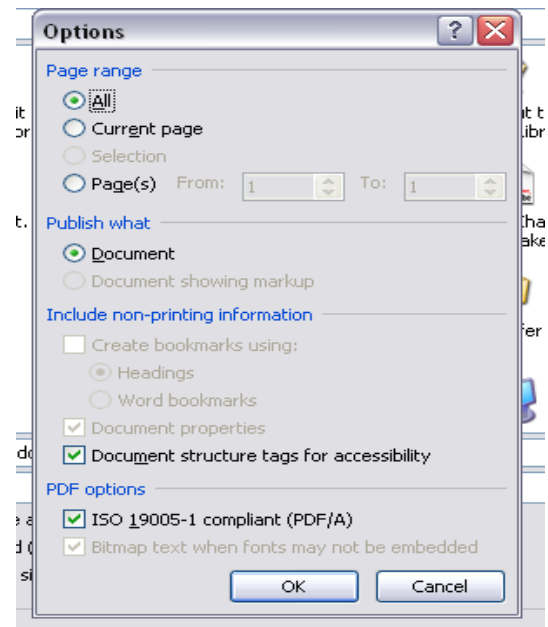
Publish what: Document

Include non printing information: Document
Structure tags for Accessibility

PDF Options: iso 19005-1 compliant (PDF/A), then click **OK**.

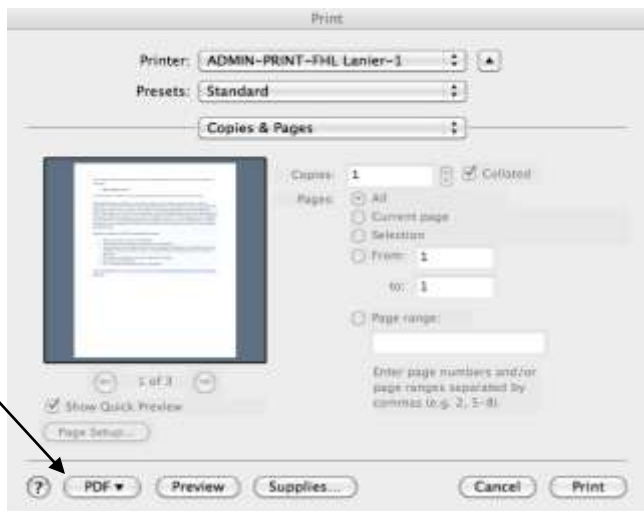
7. Click **Publish**.

If you don't have Microsoft Word 2007, there are many programs online for a reasonable price that will allow you to transform earlier versions of Word or other documents into PDF/As. Microsoft Office Marketplace, for instance, provides third-party links to a number of different companies; check to see that they convert to the PDF/A 1-b format. Most of the programs can be downloaded in trial version for free.



APPLE/MACINTOSH COMPUTERS (OS X)

Microsoft Word for Mac also allows you to save any word document in PDF form. However it is not compliant with PDF/A-1b.



If you are using a Mac, you will have to use Adobe Acrobat Pro (not Adobe Reader) or one of the online pdf converters, described above.

In Mac Word: Open your Word document and pull down "File" to "Print." The resulting print dialog box has a button on the lower left labeled "PDF." Select "Save as PDF-X" (this step embeds the fonts but the document does not yet conform to PDF/A-1b).

If you have **Adobe Acrobat Pro**, open your new pdf document, and pull down from "Advanced" to "Preflight." Under "Profiles," choose "PDF/A Compliance" then click on the little triangle to the left of the selection to reveal a list of choices; choose "Convert to PDF/A-1b (sRGB)" and click the little button that says "Execute." Ignore the box that warns you about "Fixups" since you have an untouched copy to check the new document against. The resulting, full PDF/A-1b document will appear on your desktop (or wherever you saved it) with "_A1b.pdf" appended to its name. In most cases, it will not differ from the original, but you should compare it with the untouched copy.