

# The CGN network goes through pdfaPilot to register balance sheets

**F**inal balance sheets, constitutional deeds, changes and operations on company shares, business transfers, modifications to company agreements, acquisitions, mergers, dissolutions and cancellations: the common denominator to all the annexes to deliver to the Companies' Register is the PDF/A format. "An obligation — says Giada Marangone, Head of Communication at CGN services — which we adapted to both early and well".

The first Italian IT network, CGN brings together more than 20,000 professionals from the fields of accounting, law, tax and labour. They benefit from services for their day to day work such as Chamber of Commerce forms, tax obligations, legislative updates, data banks as well as consultancy and training.

## The reason for a choice

"Software is also one of the tools we supply to the professionals in our network — says Marangone. So, for the conversion and validation of the files to be deposited in PDF/A format at the Chambers of Commerce we set out to find an adequate tool. And the choice — after a complete analysis — was pdfaPilot from callas software".

It's a product that can be used both as a stand-alone application and as a plug-in, which CGN's team of developers has integrated into its own data transmission platform through which the professional members access its services.

The search for a suitable product started by looking at those pointed out on the [www.pdfa.org](http://www.pdfa.org) website. Various tests were carried out, since there are tens of thousands of forms presented to the Chambers by the members of our network and it was necessary to ensure a totally suitable conversion to PDF/A.



The first Italian data transmission network that brings together over 20,000 professionals — including accountants, tax and labour experts — has chosen callas' package as document conversion and verification software for the PDF/A format: completely appropriate transformation and validation for the forms to be presented to the Chambers with the standard's requirements

The objective was to find the right product to meet the indispensable requirements of lightness, ease of use and non-invasiveness as regards the operating system. Indeed, CGN periodically supplies

## PDF/A, long term standard

PDF/A is a standard published by ISO under "ISO 19005-1:2005". It specifies the use of the PDF format for the long term archiving of electronic documents and sets out the requirements for the PDF format for archival use. In particular, the PDF/A project arises from the need to make a system available that enables archiving of documents in such a way as to allow the preservation of their contents even for a very long period of time. In addition to this there is also the need to be able to recover and reread documents correctly and repeatedly each time that it should be necessary.

This standard defines in detail what content is allowed and what isn't. These instructions, as others, are needed to ensure the legibility of documents independent of the application software and the operating system on which they were originally produced. The PDF/A standard allows the recording of different types of content: e-mails, manuals, technical drawings, contracts containing legally valid digital signatures, documents containing digital images with the advantage of keeping the colours correct, accessible PDF documents that can also be read by portable readers.

its members with a CD containing the programs which enable interaction with the network's data transmission platform; since the PCs which the various professionals' offices work with are very heterogeneous, at times with rather outdated operating environments too, it was fundamental that the application could operate without changing the registry file and without requiring particular configurations.

"All these were the key characteristics, – states Cappellato – which in the end we found in the generation and conversion tool already adopted by Infocamere, pdfaPilot, which we then decided to use ourselves."

In this way the CGN team has enriched its new service's data transmission platform by giving the client's associates the same application.

"The software gets copied from a CD to a directory on the hard disk and can be used right away. The package's interface is typical of the Windows environment, it doesn't require particular setups to function, and the execution of the operations takes place transparently".

The professional who has to produce a deed in PDF/A, starting from the production of the texts or from a PDF file, launches the virtual printer and gets the document which is later validated by callas software pdfaPilot and which may then be sent by internet to the Chambers of Commerce Register.

pdfaPilot does a good job not only in converting PDF files generated by Microsoft Office applications but also from all other sources. However, there are situations where even pdfaPilot is not able to repair

the PDF file accordingly. This is a difficult situation for somebody who is not a computer expert.

"A certain expertise with the various stages between generation and transformation of the format is needed. – Cappellato admits – To simplify the matter and to supply unreservedly valid answers in recurring cases we have created a document that summarizes the solutions to the most frequent questions received by our call center".

### A necessary move

"Based on the conversion capabilities of pdfaPilot and on the basis of our precise instructions on how to generate documents for compliance down the line – the CGN technical manager continues – they have been able to independently solve most of the problems".

The final step for the professionals is the transmission of the deeds in PDF/A format to Infocamere's web 'front office', Telemaco. "First though – adds Marangone – the form's sensitive data is transmitted to us for a final check: this promptly ensures the "cleanliness" of what is going to be sent. In general, our task for the professionals who belong to the CGN network is to lighten their workload by speeding up their operations."

This clearly stated role, alongside free membership, may be the decisive factor when deciding between the different providers.

"And the care which we've taken over the implementation of this new service should be seen in the same context".

## callas software – committed to PDF standards for more than a decade now

callas software has created and delivered PDF/A archiving solutions for any size of organization in any sector of business. With an ever-growing amount of documentation now produced digitally right away, and not to speak of the large volumes of paper documents being scanned, organizations in all sectors are struggling to meet the challenge of how to move beyond paper to storing their documents electronically. PDF is the format that can easily be created from any source format and for which a wide variety of vie-

wers is available. But in archives or for data exchange PDF files must also prove authentic, reliable, complete, unaltered, and usable across time, and to achieve this PDFs must meet the PDF/A international standard.

From callas pdfaPilot 2, a desktop tool running on individual workstations to the fully customizable callas pdfaPilot Server 2 solution that allows the user to create large numbers of PDF/A compliant files quickly, callas software's solutions guarantee a future-proof

archiving strategy for all types of electronic documents. Businesses and government agencies all over the world rely on callas software's archiving products. The company has also provided the Preflight plug-in for PDF/A validation and conversion in Adobe Acrobat. callas software is based in Berlin, Germany, and is a founding member of the PDF/A Competence Center.

For more information, please visit [www.callassoftware.com](http://www.callassoftware.com)

# Deeds in PDF/A for the Companies' Register - Callas validates them

**W**hen legislation and practice converge, complying with the regulations is simpler. That's been the case with the deeds that firms deposit with the Chambers of Commerce Companies' Register - computer documents that from this year on have to be produced in PDF/A format. Infocamere carries out systematic compliance checks on them using procedures from callas software's pdfaPilot application, which has been entrusted with the prompt validation of the files sent to the Register.

Michele Piva, Head of Marketing for the document area of the Italian Chambers of Commerce IT department: "We're dealing with a standard that was already widely in use before the Ministerial Decree (of 10 December 2008 sanctioning its use) came into effect, exactly because it derives from the PDF which firms had been widely using for some time."

## Leading edge standard

Of the possible candidates for the long term archiving of electronic documents the PDF/A won out over XPS (XML Paper Specification), TIFF G4 and JPEG. "The PDF/A - Piva adds - was set as the standard ahead of the legislation. Infocamere has invested in it both for the necessity of making available documents that must keep their legal integrity and value over time - considering that the elimination of paper is a must in public administration - and because it considers that, as it is a reinforcement of the PDF, the shift over to it could be taken for granted".

And the statistics are indeed showing this: whereas from the beginning of March to the middle of April already 47% of the deeds presented to the Companies' Register were compliant with the new measures, the documents deposited in the following month and a half achieved a format validation of over 58%.

"Looking in particular at company constitution deeds, the most frequent type received in total by the Chambers of Commerce among the over 580,000 analyzed in the period under consideration (excluding the documents classified as 'other deeds')



The pdfaPilot tool from callas software is the central point in the Infocamere application which validates deeds in PDF/A format deposited at the Companies' Register: a legal obligation which is transformed into a service with multiple benefits, from the increase in reputation to the homogeneity of documents later granted to information agencies who deal with their sale

turns out to have been in PDF/A compatible format. And for a good 89 of the 105 Chambers the percentage of valid ones is over 80%. This is the proof that the adoption of the PDF/A is being generally and rapidly confirmed over the whole of Italy".

According to the ISO 19005-1 standard, PDF/A offers a mechanism "for representing electronic documents in a manner that preserves their visual appearance over time, independent of the tools and systems used for the creation, memorization and

## Bridge Technologies, a bridge over standards

Bridge Technologies is an Italian company that since 2005 has been developing complete projects in the area of information management and hybrid mail.

As an international level System Integrator, Bridge Technologies provides technologically advanced solutions for document automation, document conversion and bulk mail.

Bridge Technologies is able to manage your company's documents along their entire life cycle, making it the ideal reference point to talk to about the composition, processing and bulk conversion of document flows intended for printing, archiving and consultation.

Bridge Technologies is the exclusive distributor of Compart AG, as well as the first Italian member of the "PDF/A Competence Center", the international association of companies working on the development and promotion of the ISO PDF/A standard.

Bridge Technologies is aimed at clients in the Enterprise band, providing integrated solutions to improve business productivity and optimize the availability of internal resources such as applications, services, processes and information. It enables both public administration and large companies to reach their fixed targets through an excellent and efficient management of the entire information life cycle.

rendering of the files”.

In other words, the PDF/A files are self-contained and, since they incorporate the information (content, colour, image, text and so on) necessary to display the document, they do not require any additional data for its correct visualization. However, exactly on account of this property, the format must exclude determined functions allowed in normal PDF files such as transparency and multimedia content, and cannot include macro-instructions or rely on links to external resources.

### The validation check

“In order to facilitate the file production operations – continues Piva – we have also chosen the blandest compliance to the standard – which corresponds to the sub-category PDF/A-1b, for which no explicit logical structure is needed. Despite this we have noted that there are some recurring errors: on the one hand, the poor indexing and aggregation of the deeds attached to the form; on the other, the widespread habit of creating a copy of the document which then doesn't have the original's representation (and its metadata) and so loses its validity”.

As well as all this, the possibility of visualizing a document “in PDF/A form” is not in itself synonymous with standard compliance: “It happens – even with Adobe Reader 9, which provides this indication – a source of a widespread error. Thus the only way to ensure adherence to the standard is the validation control”.

To check this it is necessary to use products such as Adobe Acrobat 9 Pro or pdfaPilot from callas

software. The alternative is the free service, accessible from the tools section of the WebTelemaco site, which employs the same pdfaPilot tool used by the Companies' Register office and which enables the validation of any document whatsoever supplying the result online, complete with details of any non-conformities encountered.

### Negative outcome — rejected form

“For our validation procedures – explains Piva – we have used the server version of pdfaPilot, which the application we've developed makes appropriate calls to, determining the correspondence to the PDF/A-1b specifics. A good number of the people we work with, from service professionals to notaries and accountants, get a great deal of benefit from the tool on WebTelemaco. And, once we've received the files, we regularly repeat the checks. If the outcome is negative, the form is rejected”.

“The management application was created over the space of three months from the approval of the Ministerial Decree and required an investment of around 30,000 Euro. An expense which has already been repaid by making available a standard that guarantees long term document validity and integrity: a guarantee of uniformity to a defined standard and, therefore, also of quality. Among the further benefits, apart from the return on image, is the improvement of cash flow, since compliance to the standard ensures that homogeneousness which is a key element for its subsequent conservation and concession – on payment – to distributors and information agencies who use it for commercial purposes”.

## PDF/A Competence Center more than 100

Founded in September 2006, the PDF/A Competence Center's purpose is the promotion of information and experience exchange in the field of long-term archiving following the ISO 19005 (PDF/A) standard.

The association includes developers of PDF solutions, companies that work with PDF/A in the DMS/ECM field, individuals interested in the subject, and also users who want to implement PDF/A in their organizations.

The PDF/A Competence Center is an association founded by callas software GmbH, Compart AG, LuraTech Europe GmbH, PDF Tools AG and PDFlib GmbH, and up

to today has more than 100 members spread all over the world. In particular the North American Chapter was recently incorporated.

### SERVICES

The association provides a large number of services including organizing events, making technical documents available and the organization of working groups that take part in international committees for the definition of standards.

Some of the PDF/A Competence Center's initiatives to be pointed out are the organization of the PDF/A Conference – an event



on the PDF/A standard with the participation of international speakers and the organization of workshops for the application of the PDF/A in different sectors. The last event was held 18–19 June 2009 at the Berlin Kosmos.