

Making PDF Work in the Office

Create, Convert, Collaborate and Securely Share PDF Files

Table of Contents

Executive Summary	2
The Original Portable Document	3
PDF for Business	3
Innovations in PDF Technology	4
Choosing the Best PDF Solution	6
The Bottom Line.....	7

Executive Summary

Since its debut in the early 1990s, the PDF format has become the de facto standard for electronic documents. While engineers, publishers, and printers were the earliest adopters and pushed the format to its technical limits with rich media and 3-D content, the general office worker now comprises the PDF-using majority.

Despite this shift in use, most business PDF solutions include text and graphics, and very little else. The typical business user needs to view PDFs, edit/update existing PDFs, create PDFs from paper or electronic source files, and in some cases, control security settings. Additionally, the use of PDF documents for forms, regulatory compliance, and electronic archives is expanding the need for knowledge workers to digitally sign PDFs. In short, the requirements around PDF in the office have evolved from simply enabling users to view and share this document format to letting every user utilize the PDF format in their everyday document processes, just like .DOC, .XLS and .PPT files.

Enterprise decision makers need to find cost-effective, complete solutions that enable knowledge workers to create, edit, and convert PDFs to Microsoft® Office files. Furthermore, PDF software is becoming a requirement for every desktop, resulting in a need for flexible licensing programs akin to Microsoft Office that can help an organization attain predictable, controlled budgeting goals. The best vendors also offer support, knowledge base self-help on the web, and enterprise deployment tools to maximize an IT department’s efficiency in managing the flow of business-critical PDF documents throughout the company.

The Original Portable Document

Even a visionary such as Adobe® co-founder John Warnock couldn’t have predicted how his idea of the PDF file format would become the standard for electronic documents in today’s world. In 1991, his team unveiled what was then called IPS (Interchange PostScript). It became PDF (Portable Document Format) two years later in Acrobat® 1.0.

Making PDF an open standard in the 1990s opened the door for any company to create powerful, affordable PDF applications designed with the needs of various types of business users in mind. This helped pave the way for the adoption of PDF as an electronic document standard within the walls of private corporations, government agencies, and universities around the world.

PDF for Business

What always made PDF a flexible, powerful format still holds true: it can be viewed and searched onscreen in the same layout as it appears on paper. Or it can be printed. And in today’s world, users rely on the PDF format to save and access stored documents in the Cloud without concern that the document will look different as it moves from the desktop to the cloud to smart phones and tablets.

PDF is the only file format that truly serves these purposes. In the business world, PDF is the electronic standard in which data lives. Contracts, catalogs, marketing materials, correspondence, order forms, proposals and financial reports are just a few types of business-critical documents that become PDFs during their lifecycle.

A Coopers & Lybrand study determined that knowledge workers devote a full third of their productive time re-creating documents and information, and in its own research, Nuance determined that 5% of that time is dedicated to particular PDF challenges, such as difficulty accessing content stuck in PDFs. Using these numbers, Nuance estimates that a 500-person organization could recover as much as \$650,000 annually in knowledge-worker labor costs by giving staff an accurate, easy-to-use PDF solution.

WHAT THE AVERAGE KNOWLEDGE WORKER NEEDS

Every office worker has a PDF viewer available to them. The ability to view PDFs, however, does not lead to more productive workers. At a minimum, most workers require at least the basic tools to create and edit PDFs. This saves time and money, and it even conserves natural resources. Instead of wasting time, paper, and postage/courier fees by mailing traditional paper communications, it is more productive to click “save as PDF” in a word processor, email the resulting file, and move on to the next task.

Examining the typical organization, department-specific PDF needs can include:

- **Human Resources** creates electronic forms such as vacation requisitions, benefits administration, and employee review documents. Staffers also need a straightforward paper-to-PDF conversion (including paper forms to fillable PDFs) tool that doesn’t require programming skills.
- **Sales** creates documents including proposals, offer sheets, and order forms. Any document too complicated for email can be created and delivered more efficiently with PDF. Sales staffers also need conversion and editing tools to quickly extract content from PDFs and remix it into new documents. Sales also relies on cloud technology to store and access important documents on the go.

- **Marketing** uses PDF to create robust collateral material incorporating multimedia elements such as video and audio, and can assemble PDF Portfolios for press kits, catalogs, and presentations.
- **Engineering** circulates its designs for review as PDFs, because their renderings are created in design applications whose proprietary file formats can't be viewed on customers' and colleagues' computers.
- **IT** manages large numbers of desktop installations of PDF tools deployed via servers. They need network tools and connectivity to popular document management systems such as Interwoven and Microsoft SharePoint. Where Acrobat and Reader are installed, this department also must contend with the application's large size and plug-in architecture, constant polling for being the default software on end-users' machines, as well as contacting Adobe for updates and cross-pollinating into button bars in other applications (Microsoft Word, for example).
- **Finance and Legal** traffic heavily in invoices, purchase orders, contracts, and transcriptions, passing them among customers, courts, banks, and regulatory authorities. They need creation tools—including Bates Stamping for official records—and conversion tools to gain access to legacy PDFs for which the original files have been lost. Legal also needs redaction, or the ability to automatically block out data from certain documents.
- **Records Management** takes steps to create searchable electronic archives of documents from all of the above departments. Those PDFs can remain accessible to the parties who need to see them. This helps the organization to meet regulatory mandates and saves warehouse space to boot.

Innovations in PDF Technology

PDF software has kept pace in a business world that requires global collaboration, “24/7” access to vital information, and solutions that appeal to an increasingly mobile workforce.

For example, to take advantage of all the benefits of Cloud technology, PDF solutions must be able to connect workers to the cloud by enabling them to save documents to today's most popular cloud services such as Evernote®, Dropbox®, and more. With this “anytime-anywhere” access to their most important documents using the web or their own mobile devices, employees can improve productivity, increase access to critical information, and accelerate the overall speed of business.

Additional available PDF functionality now includes advanced editing capabilities that convert and display documents as a fully editable document. This functionality enables more efficient editing using word processor-like features. It also helps users save steps related to converting, saving, and opening files in a word-processing application – especially if users plan on re-creating it as a PDF anyway.

Other new enhancements even include integrated speech recognition, enabling users to create notes quickly and accurately in PDF files by simply speaking their thoughts instead of using a keyboard.

PDF SOFTWARE CHOICES

While many knowledge workers would like to enjoy the benefits of PDF—a secure electronic document format convenient for sharing information—the cost of full-featured PDF software remains a barrier to widespread PDF use at many corporate, government, and educational sites, especially because the cost includes a lot of features the average knowledge worker does not use.

There are a variety of tools to select from, and determining the right tool is largely dependent on what feature set is most important to business users. Options range from simple viewing and PDF creation to advanced conversion and editing. A good rule of thumb to use is the more prevalent that PDF usage is in your business, the more robust tools should be deployed.

MAJOR CATEGORIES OF PDF SOLUTIONS

Readers. Hundreds of millions of users download and install Adobe Reader because it is free, stable, and works across platforms (even many varieties of Linux®), in many languages. PDF Readers do just that – allow workers to open and read PDFs. Some may allow minor mark-up capabilities and the ability to save and print files. Adobe Reader comes preinstalled as the default PDF viewer on many desktop and laptop computers.

Creation-only. Users who just want to create PDFs from electronic files have choices that typically reside with the printer drivers at the operating system level. Most of these do not offer fine control over file size or security settings (such as password protection and “do not allow printing”) that knowledge workers typically need. More full-fledged PDF creator applications such as Nuance PDF Create address these needs, and also offer robust tools to make searchable PDFs out of scanned paper documents.

Viewer/Editors: These tools enable PDF editing and allow for adding and updating text and remixing of pages, as well as adding and subtracting pages and batch conversion. While other PDF editing programs exist, only Adobe Acrobat and Nuance eCopy® PDF Pro Office can view all the latest content that can be put into a PDF, such as XFA forms data, Flash, and video.

Converters: PDF conversion software lets users extract the content from a PDF and utilize it in other applications. For example, a PDF of a spreadsheet may need to be converted to Microsoft Excel to perform edits and re-calculate. Conversion back into Microsoft Office applications can be difficult, as many products cannot maintain accuracy of layout and “remix” the PDF's content when ported back into Excel, for example.

Online conversion services are also available, but offer varying quality (i.e., with variable amounts of control over document settings and with layout in the resulting document more or less true to the original) and require trusting a third-party website with the original application file as well as exposing documents to security vulnerabilities in transit to and from the site. A proven desktop application, Nuance eCopy PDF Pro Office offers best-in-class conversion to Office applications, maintaining fidelity to the original PDF even in hard-to-convert graphics such as tables. It also enables users to save documents to today's most popular cloud services for increased collaboration and access to critical information.

Complete Solutions: The most robust tools do it all: PDF creation, conversion, editing and more, including security features, digital signatures, integration with scanners and advanced searching.

Choosing the Best PDF Solution

With so many choices at varying price points in the market, it's sometimes difficult to choose the right PDF software for an organization. Factors to consider include features, cost, licensing issues, and vendor support.

The decision process includes four main steps:

- 1. Determine the need.** Regardless of the department they work in, most employees need to create, convert, edit and share PDFs—from both electronic documents and paper—and edit and share them. They may also need password security, digital signatures, cloud capabilities, collaboration, PDF/A support for archiving, and conversion back to Word and other Office formats. Some will also need forms and redaction features, while the IT staff needs to be able to manage each desktop at the server level. For the most part, to get the full return on PDF investment (using it instead of paper and saving printing, storage, and waste costs associated with it) each user will need a complete PDF solution that covers all of these needs.
- 2. Count the costs.** PDF freeware has a great upside—it's free! Initially, that is. It also represents hidden investments, such as little or no vendor support, file bloat, and forced installation of productivity-draining adware or “pesterware” that forces employees to repeatedly click “upgrade later” boxes before they can get work done.

The different editions of Adobe Acrobat are the most feature-laden PDF solutions, but they are also the most costly off-the-shelf authoring tools. They contain many specialty features (such as preflight for publication design in Acrobat Pro) that most office workers will never use.

When it comes to PDF software, especially during economic slowdowns, budgets become a determining factor in choosing a PDF solution. Many businesses try to find a replacement for Acrobat that costs less, resource-wise, than freeware. Nuance eCopy PDF Pro Office offers the features business users need at a price that makes it affordable to put PDF software on every desktop.

- 3. Look at licensing and deployment.** Look for software with licensing models that can accommodate growth without spiraling out of control, cost-wise, or incurring unplanned costs at inopportune times. Beyond the single-user box, group-licensing models can include a site license, which covers every seat in the organization.

Open licensing comprises a set number of seats at a volume discount. Both make for predictable budgeting, without surprise bills in the middle of the fiscal year. Beyond these concerns, if you're installing a PDF solution on more than a few desktops, consider whether the vendor you're considering offers tools to enable IT staffers to manage the process from the server level.

- 4. Get the support you need.** Another decision factor is the support and online help that come with a PDF solution. Nuance offers a deep, searchable self-help knowledge base on their web site and technical support plans on a per-call or unlimited basis.

The Bottom Line

Nuance eCopy PDF Pro Office is the only PDF tool other than Acrobat that can view and create PDF Portfolios as well as forms in XFA format, and it supports PDF conversion from more file formats than its main competitors. Its paper-to-PDF text conversion is based on Nuance's OmniPage Optical Character Recognition (OCR) engine—a well-established product known for being one of the most accurate on the market—while most other PDF vendors must license someone else's OCR engine.

If your organization's budget dictates that you must segment PDF creation and conversion among different groups of employees, Nuance's flexible license plans offer budget control and flexibility. Nuance's web site knowledge base helps end-users quickly find answers to most of their questions, and also offers best practices to improve productivity. And tight integration with enterprise-class MFP scanning software like eCopy ShareScan® make paper-to-digital process improvements easier than ever to achieve.

These choices offer immediate relief from the high costs of Acrobat

eCopy PDF Pro Office offers redaction, Bates Stamping for legal use and regulatory record keeping, support for Digital Rights Management, compliance assurance with PDF/A, and many network deployment tools, as well as tech-support plans that give IT departments the means to efficiently roll out and maintain PDF use throughout the organization. It also includes a full-featured PDF viewer that can show all types of content that can be put into a PDF (Flash, 3-D renderings, etc.)—negating the need for switching back and forth into Adobe Reader—and the most robust array of PDF editing features in eCopy PDF Pro Office.

Furthermore, its integration with Microsoft® SharePoint, Hummingbird®, Interwoven®, Open Text, EMC Documentum®, Xerox DocuShare® and Therefore™ document management systems, as well as CaseMap® from LexisNexis®, will help organize the sea of PDF files flowing through your network, and make them accessible for managers, recordkeeping, and regulatory mandates.

Nuance leads the way toward bringing the productivity of PDF to your organization. That holds true whether your business has one employee or 10,000, thanks to the licensing and support plans available. Join the ranks of thousands of businesses that have already chosen Nuance for their most vital IT projects. While the business world is unlikely to achieve a truly paperless office in our lifetime, a less-paper office is within reach through Nuance eCopy PDF Pro Office.

About Nuance Communications, Inc.

Nuance Communications, Inc. is a leading provider of speech and imaging solutions for businesses and consumers around the world. Its technologies, applications and services make the user experience more compelling by transforming the way people interact with information and how they create, share and use documents. Every day, millions of users and thousands of businesses experience Nuance's proven applications. For more information, please visit www.nuance.com. ■

