

**## CW BULLETIN SPONSOR ##****Balancing Document Sharing and Corporate Security**

*As threats to business information increase, Communications and Legal professionals look to gain more control over who can access business documents*

*by Ricky Liversidge  
Director of Product Marketing, Adobe Systems Incorporated*

The risk to corporate information is greater than ever. With just a click of a button, draft Communications plans and product-development information can be made public to a global audience in seconds. The culprit could be a disgruntled employee or it could be unintentional, with an executive mistyping an e-mail address and sending confidential files to the wrong person. No matter how it happens, information security breaches are costing companies big in terms of damaged corporate images, lost revenues, and missed product development schedules.

Increased threats to information are prompting Communications and Legal professionals to rethink how information is delivered, who has the potential to receive it, and what steps can be taken to prevent unauthorized access to materials. The proliferation of e-mail and the Web has added to the challenge because digital documents can now travel around the world in less time than it takes to slip the same information on paper into an envelope.

Fortunately, a host of solution providers and business professionals are responding to the need to secure and control information sharing. Technologies for securing networks and authenticating users abound, while IT managers and other security specialists are collaborating with departmental managers to find easy-to-implement policies and applications that keep documents and information flowing to the right people at the right time.

**Public sharing of private information**

Communications employees often have the privilege of being the first to know about confidential company information. Yet this insight comes with its own challenges. For one, generating business communications is generally a team effort, with employees working with numerous executives and other content specialists. As the number of people providing input and reviewing materials increases, so do potential legal issues and information security threats. Equally challenging is helping ensure that sensitive, internal-only communications stay confidential after being released to employees.

"There is a disconnect in many business approaches to securing information," says John Landwehr, director of security solutions and strategy at Adobe. "Companies often devote tremendous resources to securing systems that store business data but do little to protect documents that can contain the same or even more confidential information." The reality is that any strategy to safeguard corporate information and improve Communications processes has to address document-level security, in addition to network security. Without it, documents can be shared and copied at will, opening up possibilities for private information to end up on public Web sites.

### **Safeguarding document processes**

Adobe has solutions for helping secure document creation, collaboration, and distribution. From preventing recipients from making unwanted changes to document content to restricting who can open documents and how long they can access them, functionality in Adobe Acrobat Professional software and Adobe LiveCycle software is being used by Legal and Communications professionals worldwide. The Adobe solutions integrate easily with existing business processes and technologies and enable staff to distribute materials as secure, platform- and application-independent Adobe Portable Document Format (PDF) files.

Central to addressing the need for document security is establishing upfront the type of security and controls associated with each document. "It is vital to implement an approach that is easy for all staff to follow, not just a few IT security specialists," says Landwehr. "This is because successful document security strategies depend on employee compliance. If security solutions are available to too few employees or are too complicated, staff will continue sending unsecured documents." The goal of any strategy then is to find a solution that addresses the business needs, while acknowledging the reality of how people work.

---

### **Things to Consider When Addressing Document Security Concerns**

It is important to consider the following when looking to secure communications:

- ***Global Audiences Require a Global Approach***

Because Communications staff frequently works with corporate groups worldwide, the process and technology capabilities of each region have to be addressed. In many cases, solutions that are too centralized, require too much training, or are too costly to implement are simply not viable. To balance the need for security with the budget and staffing realities of remote offices, companies are adopting solutions such as Adobe PDF to enable employees to deliver secured documents on their own, without requiring expensive technology or ongoing support from IT staff.

- ***A Security Strategy is Only as Secure as Your Documents***

One of the last things that Communications or Legal professionals want to see is an upcoming announcement broadcast days before its official release. Yet this is exactly what is happening at many companies worldwide. Just when and how information gets leaked often remains a mystery, but the impact of the leak is all too real. By distributing unsecured draft product documents and marketing materials, employees increase the chance that they will lose control of sensitive information.

To address the problem, many companies are creating and distributing materials as password-protected PDF files that, in the case of Adobe solutions, also contain built-in limits on how long materials are available for review. This means that documents sent to regional offices or even to

outside partners under non-disclosure might be available for viewing only for one or two days; setting time limits helps ensure that confidential information does not live on forever outside of your organization.

- ***Safeguarding Content Improves Control***

Communications professionals routinely deal with legal issues around trademarks and patents. For instance, trademarks and other identifiers can disappear from pages during review processes or can be inappropriately applied to items. Changes can also be made to financial data, dates, and other items that should not be altered. By delivering materials in a format that people can access but not change, it is possible to get the required input, without worrying about unwanted edits being made to core content.

At 1185 Design, an award-winning creative design firm in Palo Alto, California, Adobe PDF is used to distributed documents internally and externally for review. "Project team members are free to electronically review and comment on materials in PDF, but they cannot change document content," says Peggy Burke, president of 1185 Design. "This greatly streamlines approval because we can quickly identify edits and then go back to the original documents to incorporate changes."

- ***What You See Isn't Always What You Get***

As recent news stories demonstrate, electronic documents often contain a lot more detail than what is apparent at first glance. For instance, SCO Group lawyers learned this first hand after submitting court documents in Microsoft Word files as part of their suit against DaimlerChrysler and Autozone.

Unfortunately, the SCO Group lawyers did not realize that a document's history and metadata, including the original text and subsequent changes, can be viewed easily in Microsoft Word. As a result, it was revealed that the firm initially wanted to bring a suit against BofA, not DaimlerChrysler—clearly something that SCO did not want to be known. As the SCO Group's experience illustrates, business managers have to realize that many common electronic document formats can often reveal a lot of detail that is best kept secret.

For more information on how Acrobat can help Communications professionals secure and improve document collaboration and delivery, please visit <http://www.adobe.com/products/acrobat/business.html>. Additional security information can be found at <http://www.adobe.com/security/main.html>.

###

