

Centralize Adobe® PDF Creation with Adobe Document Services

Documents are any organization's primary vehicle for communicating and storing information. Sounds simple, but the landscape has changed. Competitive pressures are driving improvements in customer communications, and new regulatory requirements are imposing stringent rules around document control.

ADOBE PDF: THE IDEAL ELECTRONIC PACKAGE

With more than 165 million Adobe PDF files available on the Internet today, Adobe PDF is recognized as the de facto standard for electronic documents. Adobe PDF is successful because the files can travel across organizational boundaries and from device to device without losing visual appearance, data, internal logic, or security. Adobe PDF documents and forms look exactly the same visually as they do in print, locking in all the original fonts, graphical elements, and layout formatting—an enormous advantage when government or financial forms must conform to specific formats. Adobe PDF access controls enable organizations to determine who is allowed to view, print, share, or modify a document.

Adobe PDF offers a secure and reliable way to communicate information and store content. Many organizations have standardized on Adobe PDF as the format for sending electronic information to customers or citizens, delivering information via the Web, or storing content in archiving systems.

A PDF "Hub" for Enterprise IT

For large enterprise IT departments that need a way to generate Adobe PDF—either by enterprise users or as part of automated processes—Adobe provides a PDF hub, a set of server-based document services that provide flexible Adobe PDF creation, assembly, and security capabilities.

Adobe Document Services enable IT departments to centrally manage and deploy Adobe PDF creation, assembly, and security across the enterprise to meet the needs of:

- Individual end users completing everyday processes that involve converting documents in standard office formats to Adobe PDF.
- Various lines of business creating customized applications for customer communications, streamlining information storage, or embedding Adobe PDF creation into enterprise applications.

Meet Enterprise Needs with Flexible Deployment Options

Adobe Document Services for PDF creation are easily integrated into an organization's existing IT environment and deployed with minimal end-user training. Flexible deployment options, combined with the ability to control the properties of the documents that are generated, enable IT to meet a diverse set of departmental and organizational needs. For example, IT can ensure that documents are both protected from tampering and optimized for storage.

Adobe Document Services for PDF creation provide functionality that resides centrally on a server. Enterprise users can submit documents authored in applications such as Microsoft Office, Microsoft Project, Corel WordPerfect, or image file formats to a server for conversion into Adobe PDF. Multiple deployment options provide a variety of ways for users to interact with the server including watched folders, e-mail, Web interface, and Web services APIs.

Because Adobe PDF creation and assembly are centrally managed, IT professionals have the ability to specify Adobe PDF job options, such as optimizing for highest quality or smallest file size. In addition, IT can apply a password to restrict printing or editing, preserve styles and bookmarks, automatically convert all URL text to clickable links, and add tags to enable accessibility features for the physically impaired.

For further customizing documents, Adobe Document Services provide the ability to combine content from disparate sources into a cohesive Adobe PDF document package complete with a table of contents and headers and footers. Additional features for customizing Adobe PDF files include the ability to manipulate pages (insert, extract, delete, rotate, scale, overlay, and renumber), apply watermarks, and insert/extract metadata important in the context of content management systems.

Digital Signatures and Document Control

In addition to server-based Adobe PDF creation and assembly, Adobe offers server-based security functionality to enable enterprises to digitally sign and certify Adobe PDF files. Using these capabilities, IT can leverage investments in public key infrastructure (PKI) and smart card solutions. IT can also automate the process of encrypting/decrypting and digitally signing electronic documents. Adobe server-based software provides bulk digital signature capabilities on Adobe PDF using Hardware Security Modules (HSMs) for highly secure cryptographic functions.

At the document level, IT can dynamically apply document usage controls to manage use online or offline and inside or outside the firewall. IT has the ability to change usage rights or revoke access after distribution, establish time controls for access, and audit user actions.

When enterprises distribute information electronically, it is critical that recipients can validate that the document they receive is from the actual business entity or person who sent it, and that the content has not been altered, manipulated, or shared inappropriately.

The following diagram offers a simplified view of the steps involved in an Adobe solution for centralized PDF creation.

ADOBE DOCUMENT SERVICES: DELIVERING CENTRALIZED PDF CREATION AND ASSEMBLY INCLUDE:

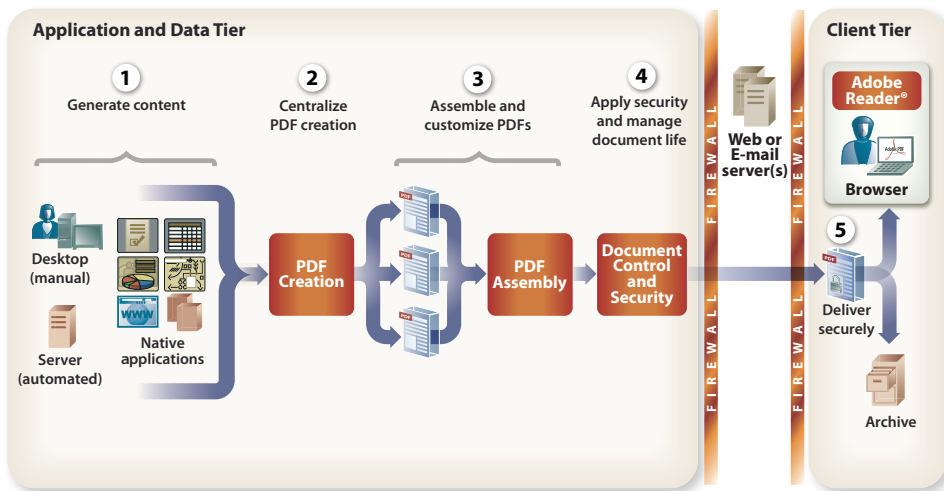
Adobe Acrobat Elements Server, a document generation solution for deploying and managing Adobe PDF creation capabilities across the enterprise.

Adobe Document Server, a document generation solution for creating, manipulating, and automatically assembling multiple Adobe PDF files.

Adobe LiveCycle™ Document Security, a document security solution that offers digital signature and encryption capabilities across an enterprise.

Adobe LiveCycle Policy Server, a document control solution to manage and monitor electronic documents with confidentiality, privacy, and accountability policies that persist online or offline, throughout the document lifecycle.

Figure 1. A PDF Hub



Step 1. Generate content. End users generate unstructured content from desktop applications; automated enterprise processes generate structured content.

Step 2. Convert content to Adobe PDF.

Step 3. Assemble multiple Adobe PDF files and documents into a single, personalized Adobe PDF document.

Step 4. Automate the process of encrypting and digitally signing electronic documents, or apply document usage controls.

Step 5. Deliver Adobe PDF files to anyone using Adobe Reader® and/or automatically archive content.

CENTRALIZED PDF CREATION— BUSINESS BENEFITS

Improve customer communications

- Improve customer response times with automated document generation
- Generate personalized, effective communications

Reduce risk and meet regulatory requirements

- Ensure the authenticity of company information and eliminate the risks of tampering
- Better protect privacy by securing documents

Reduce costs associated with archiving and records retention

- Eliminate the labor-intensive task of preparing documents for archiving
- Create searchable, secure electronic archives

CENTRALIZED PDF CREATION— IT BENEFITS

- Integrate easily into existing IT infrastructure
- Flexible deployment options
- Expend minimal end-user training
- Centralize control over document properties

FOR MORE INFORMATION

To learn more about Adobe Document Services, visit www.adobe.com/products/server/main.html.

Industry Application Example: Customer Communications Management

Investment firm responds to new client request for quotation

Situation

To maintain its competitive advantage, Finance Corp. needs to provide excellent customer service, fast response times, and personalized attention. Finance Corp. must be able to communicate with its customers in a personalized manner, both to improve satisfaction and to increase upsell and cross-sell opportunities. In addition, due to increasing consumer concerns about information privacy, Finance Corp. wants its customers to be confident that their personal information is secure.

Communications Task

Upon concluding a discussion with a high-net-worth client regarding accounts and other services that the firm offers, a financial advisor assembles a personalized package of information, including a cover letter, pertinent analyst reports, a brochure to upsell the client on other financial products, and a copy of the customer's statement.

Current Process: Manual and Cumbersome

The current process requires that the investment advisor manually generate a letter using a word processing application and attach it to an e-mail. Next, the advisor must search the network for the remaining documents, insert them into the e-mail, and send the e-mail with several attachments to the client. What the client receives is a cumbersome communication in a variety of formats.

New Process: Automated Adobe PDF Creation and Assembly

By accessing Finance Corp.'s Web-based Adobe PDF hub, the financial advisor can generate a letter that is automatically pre-populated with the client's name and address from the firm's customer relationship management (CRM) system. Next, the advisor automatically assembles the letter with the other information into a single Adobe PDF file. With an automated Adobe PDF hub solution, advisors at Finance Corp. apply predefined settings to each Adobe PDF file generated to optimize its file size and ensure that the text cannot be altered.

Because Adobe PDF documents are compact, a standard business document such as a letter can easily be combined with high-fidelity marketing collateral with minimal impact on the overall file size of the e-mail.

Document Security

Because Finance Corp. wants to ensure security, each document package is encrypted, better protecting the confidentiality of the information. Each document package is also digitally certified to help assure all parties involved in the transaction that the document packages are authentic and not forged.

Benefits to Finance Corp.

By automating the process of generating and delivering customized information for its clients, Finance Corp. improves the quality of customer communications, thereby providing a higher level of customer service. Because the communication is secure, the client can be assured of the authenticity of the information and Finance Corp. can meet its risk and compliance guidelines.

Adobe helps people create, manage, and deliver the highest quality digital content in the world.
Better by Adobe.™

Adobe Systems Incorporated
345 Park Avenue, San Jose, CA 95110-2704 USA
www.adobe.com

Adobe, the Adobe logo, Acrobat, Adobe LiveCycle, Reader, and "Better by Adobe" are either registered trademarks or trademarks of Adobe Systems Incorporated in the United States and/or other countries. All other trademarks are the property of their respective owners.

© 2005 Adobe Systems Incorporated. All rights reserved.
Printed in the USA.

95004509 1/05

