Work Like Tomorrow.™

How Kofax Power PDF Can Help Your Business

Premium document conversion and editing

KOFAX

Introduction

Virtually every company uses PDFs for numerous purposes, such as receipts, account statements, business reviews and marketing collateral. Since businesses started using PDFs in the early 1990s, relatively little has changed about how they work.

For all its convenience, PDF still creates challenges, from editing to organizing and protecting information. By solving nine of the most significant PDF issues in the modern workplace, **Kofax Power PDF™** provides premium document conversion and manipulation for any size business.

Summary

Most businesses today use Adobe® Acrobat® and Adobe Reader® to access and edit PDFs. For decades, Adobe offered the premier product line, but times have changed significantly since its first release in 1993.

When relying on Adobe products, businesses face difficulties in ensuring that their PDF-based documents are secure, their clients can receive updated documents quickly and their employees can convert and edit documents without wasting time fixing errors. **Kofax Power PDF** addresses these issues and more, so businesses can overcome the hurdles associated with legacy PDF programs to focus on productive, revenue-generating work.

Historical Overview

In the 1990s, businesses needed documents to protect and present information. Adobe developed the PDF file format, and over the next decade, the file format came to dominate business communication. As a format, PDFs satisfied all business needs in the 1990s and early 2000s, so Adobe acquired a large market share.

As technology progressed, businesses realized that Adobe products weren't suited for their needs. Incorporating additional software or third-party digital document signing services and struggling through instructions to effectively manipulate PDFs to make them user-friendly became a huge hurdle. And the legacy Adobe technology involved with PDF usage and manipulation failed to evolve to satisfy those needs.

Identifying the Current Problems

There are several problems that small- to medium-sized businesses face when using PDFs in their workflows:

- Converting other file types to PDF

- Converting PDFs to other file types

- Searching through large PDF files

- Editing PDF files

- Combining PDF files from multiple sources

- Creating multiple PDF files from a single source

- Organizing large documents such as manuals and reports

- Using PDF files while protecting information

- Protecting a system from embedded viruses

Each of these problems offers a unique challenge. Generally, companies worked around the deficiencies that Adobe products introduced by purchasing licenses for supplementary products that aren't well-suited for them, wasting time by using an ad hoc replacement despite its inefficiency, or simply doing without the security and convenience of well-managed PDFs.
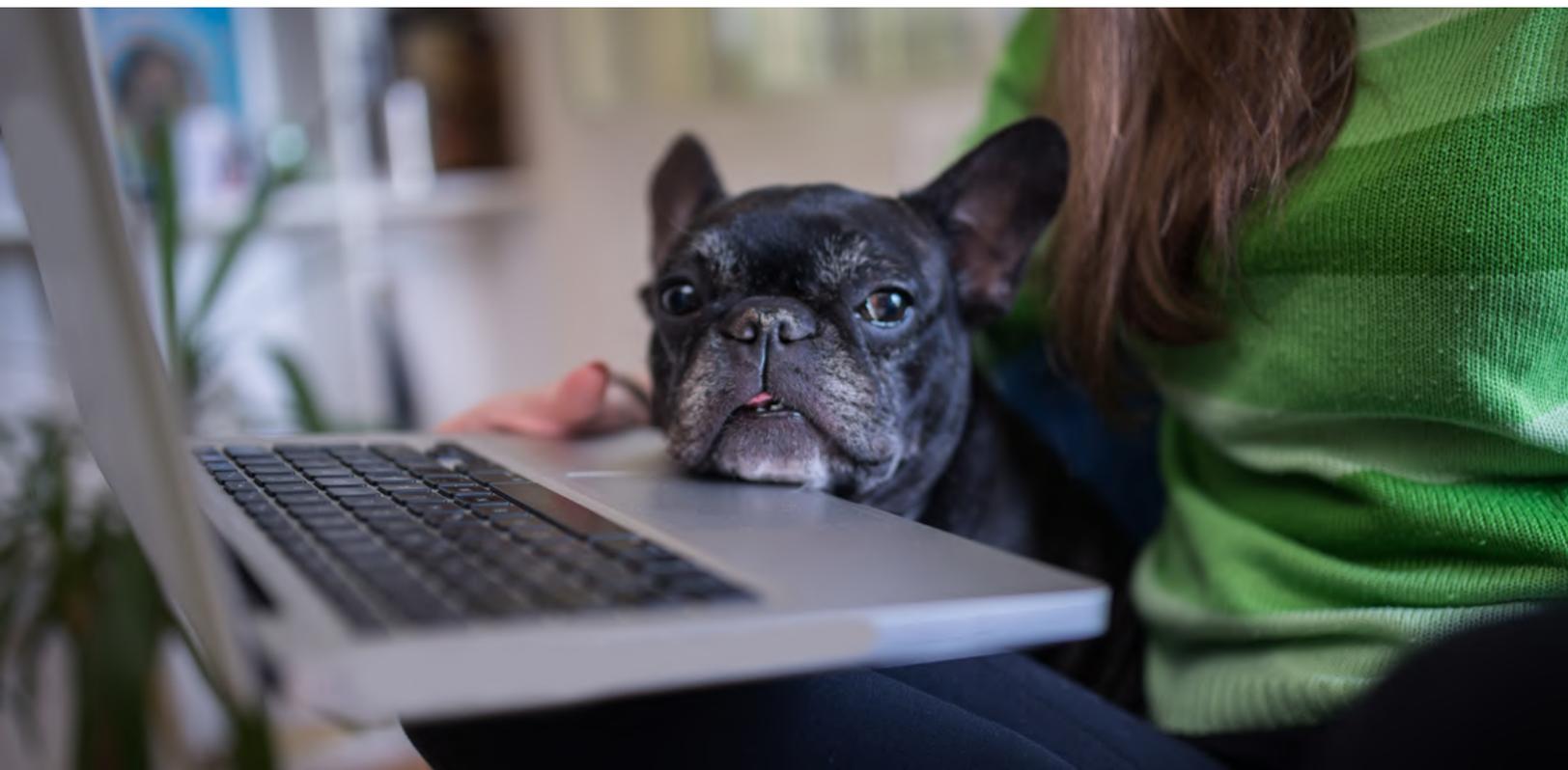
Analysis

Not every business struggles with all these issues, but it's likely you've encountered a few:

Need:
Convert other file types to PDF.

Example:
A business provides an annual profit and loss report to investors. Throughout the year, the management team recorded relevant information using Microsoft Excel and have several documents detailing expenditures, revenue, liabilities and assets organized by month and department. While Excel is excellent for creating and manipulating these tables, such files are inappropriate for a summarized investor report.

Solution:
The management team can take these Excel files and note relevant charts with a simplified commentary for the investors' review. By converting these files into PDF format, the team provides clear visuals to describe their performance.

Need:

Convert PDFs to other file types.

Example:

A firm that helps other businesses become more efficient requires documents that detail workflows. The client submits these documents in a PDF format, but the efficiency firm must drastically edit them. They are well-suited to Microsoft Word, but Word does not work with PDFs. To complete this task, the team wonders whether to retype all the information contained within the PDF in a new Word file.

Solution:

The company can convert the PDF into a Word file and make the edits directly in Word. This conversion makes it easy for staff at the efficiency firm to maneuver blocks of text, insert tables and images, and alter any of the text within the document. Once finished with the changes, the firm can convert the edited Word document back into a PDF to present to clients.

Need:

Search through large PDF files.

Example:

Many businesses generate physical applications and other documents, and sort through them to locate relevant information. In a doctor's office, patient records include handwritten forms containing large quantities of repeated information. The government mandates doctors collect and retain documents for compliance purposes. The medical office contends with keeping physical records and organizing information for easy access while treating patients.

Solution:

The office can scan these documents into a PDF format. Once these documents are digitized, office staff can then use a PDF tool to convert to searchable PDF, allowing them to find patterns of information (such as Social Security Numbers or telephone numbers) and rapidly locate patient history to provide the best care possible.

Need:

Edit PDF files.

Example:

A marketing firm delivers proposed designs and documents to a client. Given the importance of getting the final product correct, there are always several iterations that appear during back-and-forth between the design team and the client. These variations can be minor, but each one necessitates a new PDF document.

The result is wasted time spent taking feedback and editing a source document in another format, and then re-converting this document into a PDF before sending it to the client.

Solution:

The marketing team may instead take the client's feedback in real time and edit the PDF directly. The team can save even more time by granting the client access to the file on the cloud, eliminating the need to email a new copy back and forth with each alteration.

Need:

Combine PDF files from multiple sources.

Example:

An archivist works at a historical society, taking old records and preserving them for historical research and future access. The archivist saves each scanned page as its own document, then groups these pages by folder according to the historical society's organizational scheme. To access a record, the archivist must open and search through multiple documents to find relevant information.

Solution:

The archivist may take entire folders of PDFs and condense them into a single document, plus insert commentary, correlated documents and analysis, and diagrams into the final PDF. High-quality document compression means that the file remains a manageable size without losing any legibility. The final product is much easier to use, and the archivist can use a smart search to navigate through the document.

Need:

Create multiple PDF files from a single source.

Example:

A business client submits a document to an accounting firm. This PDF contains receipts, summaries and cross-referenced account statements for an entire year. The accounting firm needs to effectively parse this document and assign portions of the document to various team members. Either multiple people must work on various copies of this document or someone from the firm must notate what each page of the document is with a reference guide.

Solution:

The accounting firm sorts through the document and separates each part into an individual PDF, according to department. Then, the entire team can access these separated PDFs via the cloud, and each department member can collaborate on various PDFs without creating redundant copies.

Need:

Organize large documents such as manuals and reports.

Example:

In preparation for a board meeting, various departments compile reports to assemble into a single 100-page document. The pages are numbered and then converted into a PDF. The resulting document has a table of contents in the front, but the table of contents doesn't link to any pages, meaning that a user must manually navigate to each page to find relevant information. Just an hour before the meeting, one of the departments realizes that they neglected a vital page for the report. The need to insert this page causes the team to scramble at the last minute to update the report, including altering all the page numbers in the PDF.

Solution:

It is easy to add the PDF at exactly the right location within the final PDF. The dynamic table of contents and page numbers mean that users can rapidly transition to any page by clicking on the table of contents. Even if you insert a new page into the middle of the document, all the page numbers and links update automatically to reflect this shift.

Need:

Use PDF files while protecting information.

Example:

An interior design company has been working on a design proposal for a high-profile celebrity client. Only some members of the team are aware of the project and keep it confidential, as the client has not yet agreed to hire the firm. Those working on the document use the same network as other team members who should not have access to the file. The company must find a way to balance team access with security and confidentiality.

Solution:

The right technology can help the company control which users can access the file and allow those who should have access to open and edit the file seamlessly without requiring a password. The celebrity client's privacy is protected, and the team can work without impediment.

Need:

Protect your system from embedded viruses.

Example:

Hackers know that most businesses use Adobe Acrobat, a program with known security weaknesses. Due to the rich coding built into some PDF files, they may easily contain malicious code. When hackers design code that Adobe Acrobat can read, an office may unwittingly run a dangerous file that executes malicious code within the network. This file can compromise sensitive information related to proprietary work, clients and finances.

Solution:

Offices can elect to use a PDF reader that actively combats malicious code and can protect systems from unwanted intrusion. Counteract the vulnerabilities inherent in Adobe products by using a boutique program that offers numerous security features to keep businesses safe—even if a team member accidentally opens a corrupted PDF.

Designing a Solution That Works

Effective PDF document manipulation is affordable. Managers at small- and medium-sized businesses need a method that all employees can use to address each of the document problems listed previously. The solution must be scalable, allowing users to select basic or premium options according to business needs. Plus, managers must be able to select how many people will have access.

Employees must access features easily and naturally to integrate with Microsoft Office programs such as Excel, Word and PowerPoint. Complex functions requiring a new program interface should exhibit familiar features, such as the Office ribbon.

Finally, the solution should combine the options listed previously into a single program, so employees don't need to switch between multiple programs. The outcome is a simpler, streamlined user experience.

Justification

Power PDF is the ideal solution for small- to medium-sized businesses and is designed to address the most common PDF problems and integrate into existing workflows. Our goal is to make it easier for you to handle document conversion using PDF documents and manipulate those documents in any way necessary.

In addition to designing user-friendly software, we've integrated our solution directly into Microsoft Word and Excel. The moment your team has finished creating essential documents using those programs, they can immediately convert them to PDF format without any loss of information—at the click of a button. Employees can store and access these PDFs collaboratively through the cloud from anywhere, a feature that is especially useful for businesses that employ staff to work from home or travel for business. With Power PDF, distance from the office is never a factor that impedes your staff from getting the job done.

Power PDF ensures your staff maintains maximum security when using PDF documents. Your network is kept safe from malicious actors, and with your network's built-in security credentials, you'll restrict PDF access to those who should have it. With password-protect files, it's easier to share them with clients and other team members. For sensitive documents, you can print using password protection, ensuring that no one ever has access to confidential information.

In Conclusion

With internet and business computing, the global economy has changed forever. PDFs present information in nearly every industry, and document conversion and manipulation is an essential function for numerous steps of your workflow. Adobe products opened the door, but today, **Power PDF** takes your business and empowers you to **Work Like Tomorrow**–today.

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