



# Using Adobe® Acrobat® X to enhance collaboration with Microsoft SharePoint and Microsoft Office

Accelerate project review cycles by integrating PDF-based workflows into the SharePoint and Office platform

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This paper provides an overview of approaches to improve team collaboration and expedite project review cycles by using Adobe Acrobat X software with Microsoft SharePoint and Microsoft Office. Acrobat X supports SharePoint 2007, SharePoint 2010, Office 2003, Office 2007, and Office 2010. Discover how new, built-in SharePoint support in Acrobat X takes team collaboration to a higher level.

## Executive summary

In today's highly competitive and global markets, teams often work across organizational and geographic boundaries. Project deliverables require input and approval from multiple sources, in multiple formats, in dispersed locations.

Electronic collaboration provides disparate personnel with immediate access to project materials, accelerating decision-making and approval cycles while reducing project turnaround time and increasing team efficiency. To realize the benefits of digital collaboration, many IT departments have implemented SharePoint in conjunction with Office so that project teams consisting of employees, customers, partners, and vendors can collaborate on documents. But the ability to collaborate efficiently on documents in other standard formats, such as PDF, has been restricted. PDF is a proven standard for secure document exchange. Documents in PDF can include a broad range of content types, are displayed with high fidelity, and are accessible by anyone with ubiquitous, free Adobe Reader® software.

With the introduction of Acrobat X, project teams can now work collaboratively with PDF documents just as easily as Office documents on their SharePoint sites. The combination of Acrobat X with SharePoint and Office provides an enterprise-level solution for improving document-based collaboration.

## Collaboration challenges

According to a recent study by Forrester Consulting, "Building the Future of Collaboration,"\* over two-thirds of knowledge workers in the United States and Europe report that they regularly collaborate with people in different time zones or locations. While face-to-face or telephone interactions are preferred, scheduling conflicts often result in the use of email. However, use of email as a collaboration tool presents a number of challenges:

- **File Format**—Distributing documents as email attachments requires that each recipient be able to open, edit, and comment on various file formats across operating systems.
- **Deployment**—Desktop support and maintenance of multiple applications, including external user support, become ongoing factors. Access to various on-premise content management systems must be managed. In addition, the size of email attachments is usually limited since the replication of large files quickly consumes available space on the mail server.
- **Security**—Email is not secure, especially once a file travels outside the corporate firewall. An encryption solution may be required, depending on the sensitivity of the content.

\*"Building the Future of Collaboration," Forrester Consulting. July 2009, [www.futureofcollaboration.com](http://www.futureofcollaboration.com)

- **Feedback Tracking**—Multiple sources of comments must be manually tracked, managed, and aggregated. In addition, email collaboration lacks a method of version control.

## Accelerate review and markup workflows

Acrobat X extends the collaboration services of Office and SharePoint by providing a proven file format that can be generated from most desktop applications and viewed and commented on using Acrobat or the free Adobe Reader.

### Tight SharePoint integration

Acrobat X provides a number of new features that fit well into a review and markup workflow with SharePoint. PDF files in SharePoint document libraries are now directly accessible from Acrobat via the Open and Save dialog boxes, just like files on the local computer. When opening a PDF document in a SharePoint document library, the user can check out the PDF file and check it back into SharePoint directly within Acrobat, just like Office documents. Along with check-in and checkout capabilities, Acrobat allows users to add and edit SharePoint document library version and metadata information.

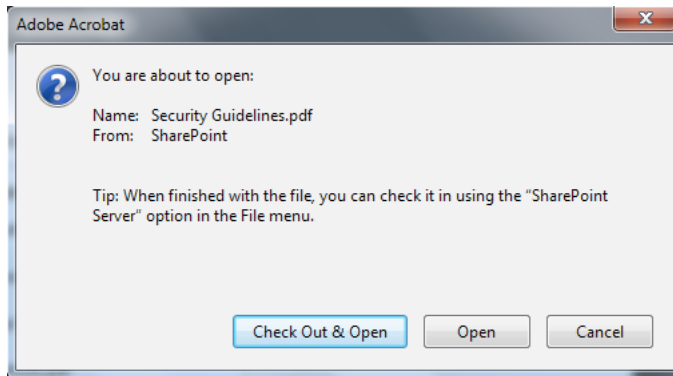


Figure 1. With Acrobat X, PDF files in SharePoint document libraries are directly accessible from Acrobat.

### Convenient, one-click access from Office

Acrobat X integrates seamlessly with Office applications through included add-ins called PDFMakers. In a single click, users can quickly generate high-quality, standards-compliant PDF files with navigational links and initiate an Acrobat based review workflow—all without leaving the Office application. For example, the PDFMaker for Microsoft Word enables users to perform the following functions related to digital collaboration:

- Create a PDF file from a Word document that complies with settings for security, optimization, tagging for accessibility, or standards such as PDF/A for archival or PDF/X for prepress printing. These preferences may be set by the user or preconfigured by the IT organization to support IT policies.
- Create and attach a PDF document to an email.
- Create and send a PDF document for review.
- Import comments from a PDF file back into the Word source document, eliminating the need to retype text edits in the Word document.

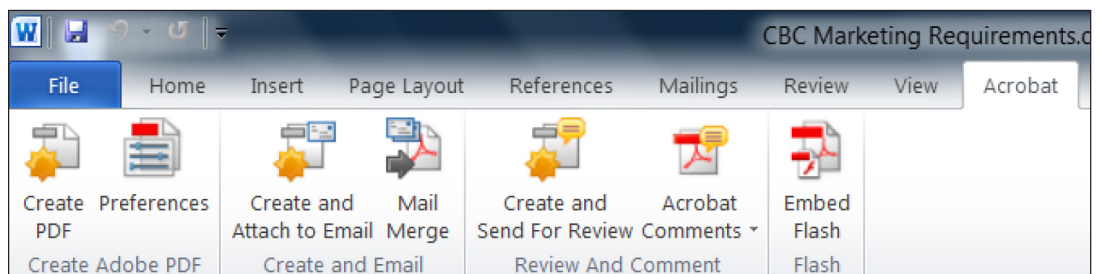


Figure 2. The Acrobat PDFMaker for Office applications enables users to initiate a shared review with one click.

## Easy and fast feedback management

Acrobat X enhances team collaboration and accelerates electronic reviews by allowing users to:

- Initiate a shared review, collecting comments using a SharePoint server.
- Send out invitations to review the generated PDF file that automatically includes a link to the document.
- Automatically receive and compile comments from reviewers—all in one document.
- Enable reviewers to view and supplement one another's comments.
- Set a deadline for reviews.
- See who has responded and remind those who have not.

## An Adobe Acrobat X solution

Extending the enterprise-level approach to digital collaboration, Acrobat X complements the SharePoint and Office platform to create a seamless and efficient digital collaboration solution.

There are two major processes in the high-level workflow. First, a document owner creates a PDF file and prepares it for review. Then the owner receives and organizes comments from reviewers. Following is a detailed description of each process.

### Initiating the shared review

To prepare for a shared review, a PDF document is created from an Office application and uploaded to the SharePoint server, and reviewers are invited to provide comments.

1. A user obtains or creates a source file. This example shows a marketing requirements document authored in Word.
2. The user clicks the "Create and Send for Review" button in the Acrobat X PDFMaker toolbar in Word. The following actions occur:
  - The Word document is converted to PDF.
  - The PDF file is uploaded to a SharePoint document library directly from Acrobat X.

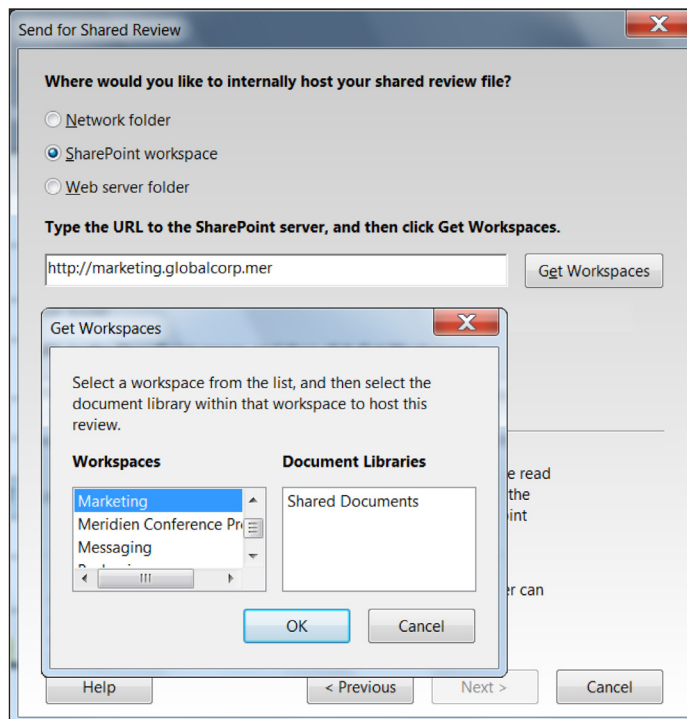


Figure 3. Acrobat delivers fully integrated shared review capabilities for SharePoint.

- The user is prompted to prepare an email notification for reviewers with a link to the document.

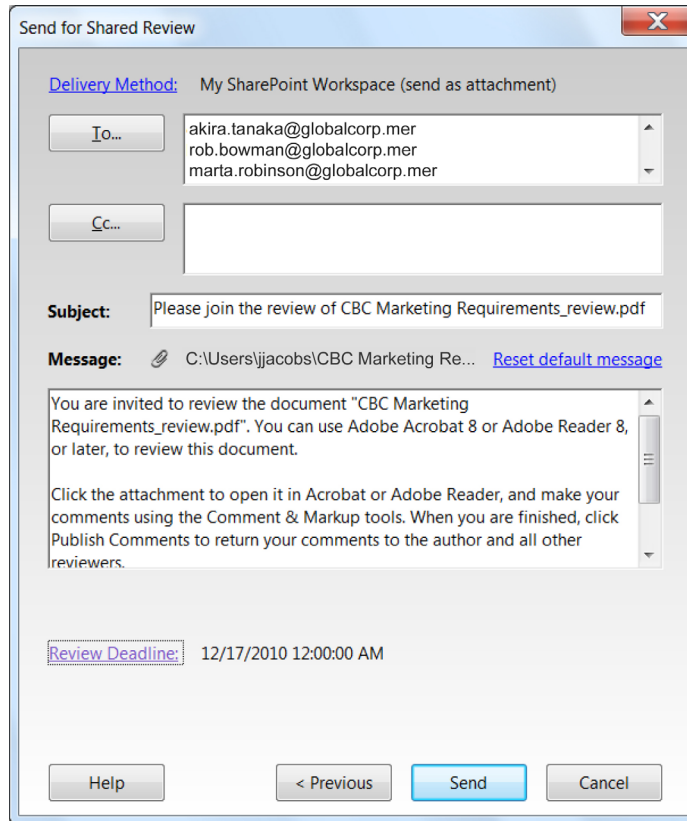


Figure 4. Acrobat guides users through the process of setting up the shared review, making it easy.

### Managing reviewer feedback

The next steps involve the document review.

1. Reviewers apply markups and comments to the PDF document, using Acrobat or the free Adobe Reader (version 8 or later for SharePoint-based shared reviews).
2. Reviewers publish their comments to the document. Comments are automatically collected and stored with the document library in SharePoint.
3. Reviewers can view and respond to comments submitted by others, eliminating redundancy and reducing review time.

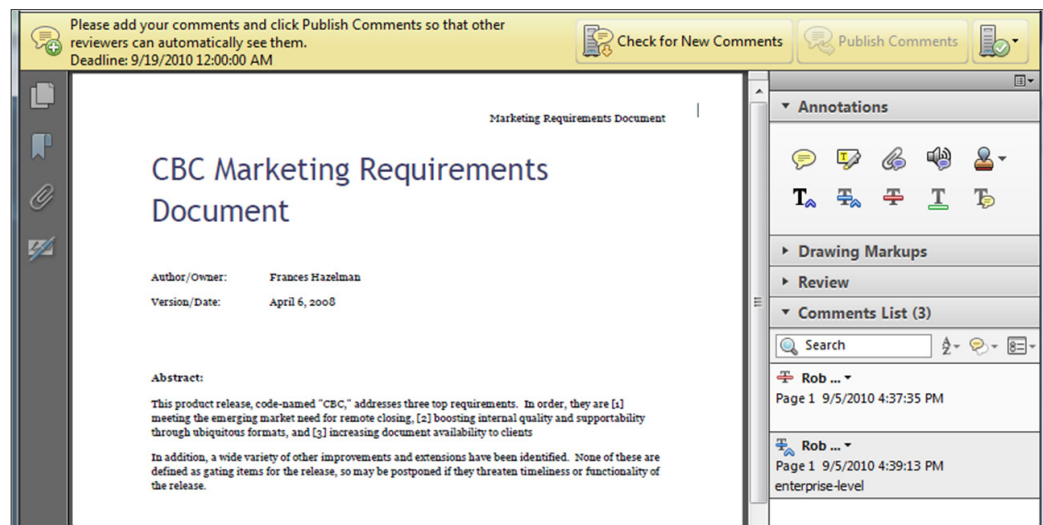


Figure 5. Feedback from all reviewers is included in the document and can be easily viewed in the Comments pane.

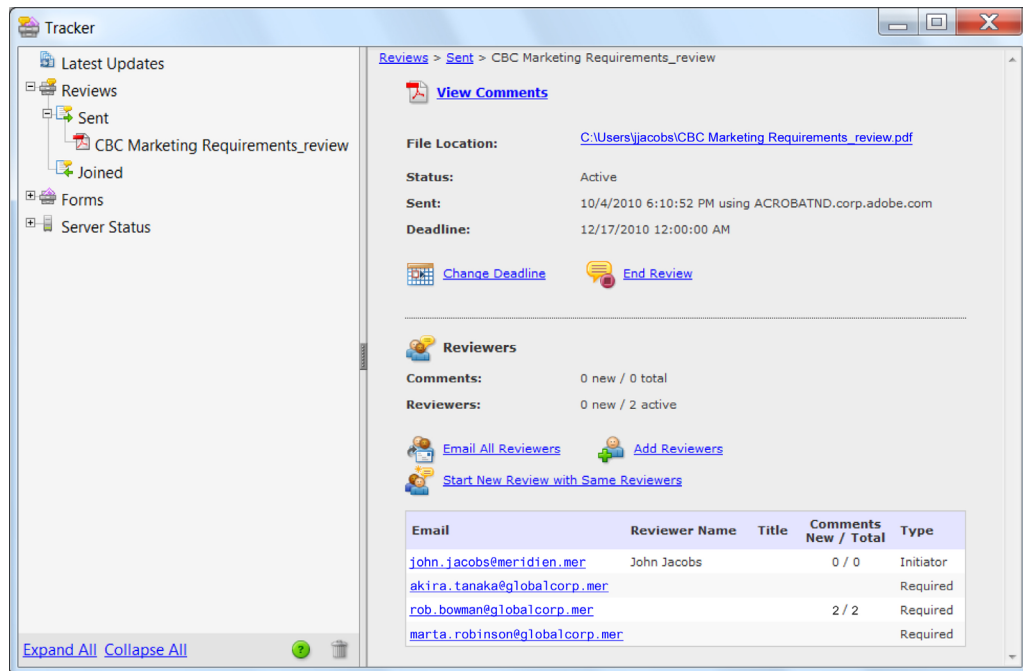


Figure 6. The Tracker tool in Acrobat displays review status, in addition to which reviewers have responded and which have not.

4. With the Tracker tool in Acrobat, the review initiator can:
  - Email a message to reviewers.
  - Add additional reviewers to the current shared review.
  - Start a new review with the same reviewers on a new file or a new version of an existing file.
  - Change the review deadline.
  - Open the PDF file under shared review to view the latest comments.
  - End the review so that comments can no longer be submitted by reviewers.
5. Once the review period has ended, the review initiator can use the PDFMaker in Word to import some or all the comments from the reviewed PDF document.
6. The PDF document containing each reviewer's time stamped comments can be archived for record-keeping or compliance purposes.
7. The final Word document may then be converted into a PDF file and protected with a password to prevent edits. If accompanying documents are required to provide further context, the user can combine these files into a PDF Portfolio prior to distributing the information to approvers or stakeholders.
8. The final PDF document or PDF Portfolio can also be archived on SharePoint for future reference. To enable searching of text in PDF files stored in SharePoint, the SharePoint administrator can install the free Adobe PDF iFilter, which can be downloaded from [www.adobe.com/support/downloads/product.jsp?product=1&platform=Windows](http://www.adobe.com/support/downloads/product.jsp?product=1&platform=Windows).

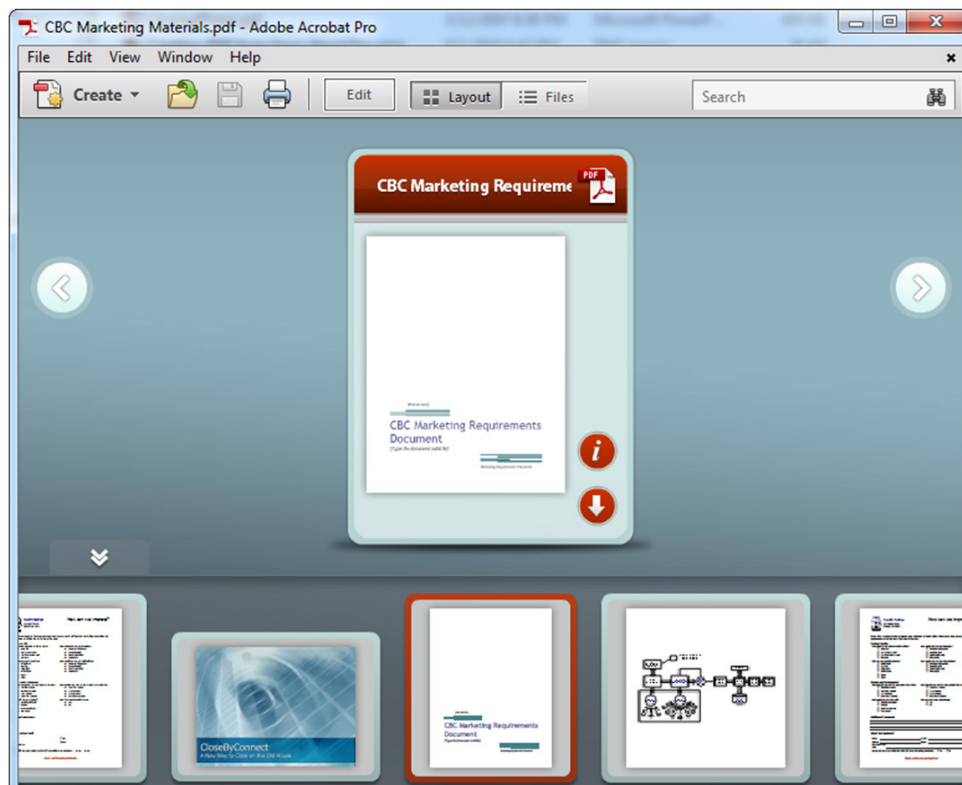


Figure 7. With a PDF Portfolio, recipients can better understand context and more easily navigate through multiple, related documents.

## Summary

By complementing the SharePoint and Office architecture, Acrobat X allows organizations to rapidly and efficiently implement a flexible and more secure digital collaboration solution.

1. **File Format**—Acrobat is the most reliable way to create PDF files across a broad range of applications. PDF is a universal format that enables virtually anyone to view digital content in the exact way that the author intended, regardless of software or hardware platform. With Acrobat, users can also insert audio, Adobe Flash® Player compatible video, and interactive media into PDF files for viewing, online or offline, by virtually anyone using Acrobat or the free Adobe Reader.
2. **Deployment**—The shared review process in Acrobat reduces internal and external desktop support and maintenance of multiple applications. Network bandwidth and email server storage is optimized since the shared review process links to the documents stored in SharePoint.
3. **Security**—While SharePoint provides access security to documents, Acrobat helps further protect files once they have left the SharePoint repository. With password protection and powerful 256-bit AES encryption technology, Acrobat helps control access and prevents unauthorized editing, printing, or copying of content. Also, Acrobat X includes enhanced sanitization and redaction tools to help remove sensitive information—including hidden metadata, annotations, attachments, form fields, layers, and bookmarks—from documents before sharing them with others.
4. **Feedback Tracking**—Acrobat X provides the review initiator with the ability to track and maintain a record of each reviewer's responses. This provides an audit trail should questions arise about the final document's content. During the review, individual comments can be assigned a status, providing real-time feedback to reviewers.

Acrobat X with SharePoint and Office delivers an efficient, easily deployed, and more secure digital collaboration solution, complete with document conversion, reviewer notifications, response tracking, comment aggregation, and archiving capabilities.



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