

InfoTrak

INFORMATION FOR BETTER DECISIONS

Electronic Documents— Making This Technology Work for Your Business Needs

In printing and publishing, graphic files are essential. And more often than not, these files are enormous—with individual graphic images, which are inserted into a document, often exceeding 10MB each. The level of information that is contained in these files is necessary for printers to accurately reproduce the image. However, for those of us who just want to view a document on our laptop or print a specific page or two to our office printer, the prospect of downloading files that take 15 minutes or longer using a dial up connection is daunting.¹

However, to succeed in today's competitive marketplace, having quick, electronic access to your marketing collateral, product information datasheets, or human resources forms keeps your business moving.

- One challenge is creating these electronic documents in formats that can be downloaded within an acceptable amount of time.
- Another challenge is managing the electronic document library to ensure that the latest versions are current and accessible and older versions are archived.
- A third challenge is integrating your electronic document management system with your hard copy, printed materials.

The good news is, all of these challenges—or let's call them opportunities—can be dealt with in a systematic, manageable style that will keep sales reps happy and productive and marcom managers sane and focused.

WHEN DOES IT MAKE SENSE TO CREATE ELECTRONIC DOCUMENTS? HINT: ACCESS IS KEY!

Accessing documents easily, quickly, and from anywhere are major objectives for an electronic document strategy. The practical aspects of those objectives are tied to two parameters: the "electronic" size of the document (in kilobytes or megabytes), and the bandwidth of the connection from the user's computer to the document storage computer (measured in kilobytes or megabytes). Yes, the units of measure mean the same thing, and you can do a rough order of magnitude calculation on how long a document should take to transfer. Here's an example:

A four-page brochure can easily be a 500K; a PowerPoint® presentation could be 2MB, a 20-page technical paper could be 250K. A sales rep sitting in a hotel room with modem access (28 K/sec to 56 K/sec) will wait 15–30 seconds for the brochure, 1–2 minutes for the PowerPoint presentation, and only about 5–10 seconds for the technical paper.



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Sitting in the office, that same sales rep or the marketing manager with access to normal office network speeds wouldn't wait more than one or two seconds for the documents. And a customer accessing the information over the Internet would experience speeds somewhere between the sales rep in a hotel room and the marketing manager in her office.

Understanding document size and user access parameters can help disseminate information more effectively (hard copy versus electronic dissemination), ensuring the user's needs are met. So, here are some examples of when it makes sense to create electronic documents:

1. If you have fairly simple forms (such as HR forms) that do not contain many graphics.
2. If you have training manuals, high-tech product sell sheets, compliance forms, etc. that require constant updates (it makes sense to update electronic versions versus continually updating printed versions).
3. If your users are using a high-speed Internet connection (DSL, cable, ISDN, T1, T3) to access your electronic documents.
4. If you have a dispersed salesforce (in multiple field office locations) and shipping hard copy documents is becoming too costly.

Some of the benefits of creating electronic documents are:

1. Cost savings realized by reducing printing, storage and distribution costs.
2. Time savings realized because all users can access documents 24-hours-a-day, 7-days-a-week, in seconds (or minutes), depending upon bandwidth.

HOW IT WORKS

Most people are familiar with web sites that allow users to click on a link that allows them to download a publication. But how does that really work? In more cases than not, the publication (a newsletter, white paper, form, or even a full-length marketing brochure) was created in desktop publishing software, such as Adobe PageMaker® or QuarkXpress™, often incorporating images created or modified in Illustrator or Photoshop, and then the document was converted to a Portable Document Format (PDF).

A PDF (quoting directly from the Adobe web site) “is the open *de facto* standard for electronic document distribution worldwide. Adobe PDF is a universal file format that preserves all of the fonts, formatting, colors, and graphics of any source document, regardless of the application and platform used to create it. Adobe PDF files are compact and can be shared, viewed, navigated, and printed exactly as intended by anyone with **free** Adobe Acrobat® Reader® software.” If the user does not have Acrobat Reader installed on their computer, a simple download from the Adobe web site quickly rectifies the problem.

So that sums up how users are able to download documents, but how does one *create* these PDFs and then somehow manage the “inventory.”

CREATING MANAGEABLE PDFS (ALL BY YOURSELF!)

You can convert any document to a PDF using Adobe Acrobat 5.0 software, which, by the way, is not free, but is not overly expensive (it's around \$250).

But while PDFs are a great way to download and print full versions of documents, there's still the issue of timing—or rather, the time it takes to download a PDF

According to Adobe (*PDF with Acrobat 4: Visual QuickStart Guide*), “the way graphics are inserted and saved can dramatically change the size of a PDF document. Further, the type of graphics used can also affect the size of that document.”

One way of controlling the size of these graphics is to use JPEG (Joint Photographic Experts Group) compression when creating PDFs. “Images that are compressed in JPEG format retain most of the colors (within a range of millions) in the original image, while losing a moderate amount of detail. So little detail is lost that most people outside of the graphics industry can’t tell the difference between the original and the modified JPEG image.”

The good thing about JPEGs is the control that it allows users. JPEGs can be saved in different options, which control the degree of original information that is retained. Using the maximum amount of JPEG compression can reduce a file to 5% of its original size, however, fonts may be substituted and text may “reflow” creating awkward breaks and formatting.

Another option is to use GIF (Graphics Interchange Format) compression. GIF was developed by CompuServe to help manage the size of online files. One major limitation is the color performance. GIF format never allows more than 256 colors. However, because GIF format retains pixel differences in colors (even though the colors themselves may change to fit the 256 spectrum), the format remains quite flexible and is an excellent choice for monochromatic images or graphics with only a few colors. You can create GIF images with Acrobat Distiller or a photoediting application such as Adobe Photoshop.

According to Adobe (and we agree) “smaller PDFs are better PDFs.” There are a number of ways to keep files smaller, but some of the most effective are:

- **Use as few fonts as possible.** This includes limiting the use of bold and italics variations of a font, since each variation is really a separate and distinct font.
- **Limit the use of graphics.** Use only those graphics that are absolutely necessary to convey your message.
- **Use the compression options.** Compression options are located in Acrobat Distiller’s Job Options dialog box.²

SO NOW THAT I’VE CREATED THESE DOCUMENTS, HOW DO I MANAGE THEM?

Although a small electronic document library can be managed by your art department or marketing manager, a true comprehensive strategy would integrate your hard copy collateral and forms with your electronic library. Ensuring that the most current documents are available *online* as well as *offline* is a management task that requires a strategy and a focused approach. If you utilize your fulfillment vendor to manage your hard copy collateral and your electronic documents, there are three critical components to ensuring the most current electronic documents are available for your users.

- **Responsiveness.** The first component is how responsive is your fulfillment vendor when you need documents added, replaced or deleted. Can your day-to-day client services associate make the necessary changes, or does that person need the support of the technology team? In either case, changes should occur quickly and should be fully documented in your client file.

- **Online Management Features.** The second component is your ability to view “version” information, so you can more accurately manage changes. Your fulfillment vendor should provide an online feature that allows customers to ensure version numbers are correct, dates of documents are visible, and that “thumbnail” versions can be seen by the customer/user to ensure appropriate ordering selection. These fields also include part number versions, date groupings, and version numbers.
- **Flexibility.** The most important element is the flexibility of your fulfillment vendor. Managing online and offline materials can be a complex task, but it's your fulfillment vendor's job to simplify it for the marketing manager.

FULL INTEGRATION WITH YOUR FULFILLMENT AND PRINT STRATEGIES

Maintaining an electronic document library has an advantage other than allowing users to download and print “on the fly.” Documents stored as PDFs, depending upon certain variables, may be good candidates for “digital print replenishment.” As discussed in the previous issue of *InfoTrak*, the central premise of the digital print replenishment model is that the fulfillment vendor keeps just the right amount of material available for users to maximize turnaround times and responsiveness while minimizing expensive small print runs, eliminating backorders and reducing over prints. By utilizing the fulfillment system to manage short-run printing needs, your marketing communications manager can focus on content rather than worrying about overprinting and high inventory storage and obsolescence costs. To determine which documents are good candidates for digital print replenishment, you and your fulfillment provider need to evaluate all collateral based, at a minimum, on the following categories:

- Historical usage patterns and/or expected trends
- Color and finishing specifications
- Frequency of content changes
- Customization needs
- Costs of offset and digital print for each document based on the expected utilization
- Turnaround deadline

So, creating an electronic document library, that is fully integrated and managed by a qualified collateral fulfillment provider makes great business sense both in terms of contributing to your ROI and increasing your users' total fulfillment-related satisfaction. 🌐

References:

¹Excerpted from Chapter 19 of *PDF with Acrobat 4: Visual QuickStart Guide*, by Ted Alspach.

²*PDFs and Graphic Strategies* by Ted Alspach. ©1999, Peachpit Press.