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Review: pdfDocs Desktop 2.1 – An Alternative to Adobe Acrobat Professional

By John Heckman

TechnoScore: 4.6

1 = Lowest Possible Score; 5 = Highest Possible Score

www.docscorp.com

INTRODUCTION

The Australian software maker DocsCorp has just released version 2.1 of its flagship product, pdfDocs Desktop. Priced at \$125 per seat (plus \$20 yearly maintenance), it is designed as a lower cost alternative to Adobe Acrobat Professional. By and large, it does this job very well, especially when paired with its pdfDocs OCR server (at substantial extra cost).

THE PROS

pdfDocs Desktop has a three-pane view with a list of documents in the middle, a viewer at the bottom, and thumbnails on the left. For a given document or page, you can do just about all the usual Acrobat functions: markup, redact, add comments, apply digital signatures, etc. You can email or fax documents from pdfDocs Desktop. It does not have Acrobat 8 Professional's sharing and collaboration functions, or the ability to minimize the size of a PDF file (though it does have an approximation), but it does have a number of additional features, including the ability to automatically convert email attachments into PDF files before an email is sent out. Usually you need a metadata removal product like Payne Consulting's Metadata Assistant to obtain this sort of functionality.

One feature not available from Acrobat and that proves particularly useful, is the ability to split a document into smaller documents either by number of pages or size. Many email systems, for example, impose limits on the size of attachments.

I recently tried to send a very large PDF file to a client only to have it rejected by their system. So I opened up pdfDocs Desktop and said: "split this 9Gb document into segments of 2Gb." After a slight delay, I had 5 separate documents of 2Gb or less, and they went through seamlessly. There is also an option to split a document into segments of a specified number of pages each. This feature can also help in dealing with court-imposed size limits.

For a given document or page, you can do just about all the usual Acrobat functions: markup, redact, add comments, apply digital signatures, etc.

Once in Organizer, you can combine multiple files and/or remove selected pages with a process that is somewhat more efficient than Acrobat: just check the documents you wish to combine. If you uncheck selected pages of a document in the thumbnail view, you can delete those pages and reassemble the document. This makes it very easy to delete a discontinuous set of pages.

The Bates numbering feature is fairly robust. You can Bates number a single document or multiple documents at a time, including an Alpha-numeric prefix and or suffix. You can keep track of the last-

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used number if you need to continue with a new set of documents. The program will shrink the pages so that the Bates number is always visible and you can include or exclude the number on the first or last page of a document.

THE CON

One major weakness of the program is that if you only have pdfDocs Desktop, the conversion of PDF documents to Word is even worse than Acrobat's, and it does not support WordPerfect at all. The leading OCR programs produce reasonably useful Word documents. Acrobat, and even more so pdfDocs Desktop, puts a lot of the text into frames, which makes editing the document in Word extremely difficult. Basically, you have to remove all the frames to obtain a useful document, and this can take up a lot of time.

Luckily another one of pdfDocs Desktop's stand out features is that it integrates with document management systems.

THE "BINDER"

One feature not mentioned above that really makes this product stand out is what pdfDocs Desktop calls the "Binder." This enables you to assemble sets of documents — similar to, say, a real estate closing binder. When you import the documents from the pdfDocs Organizer to the Binder (which unfortunately can only be done one document at a time), it will assemble the documents into a single "Binder" file. The documents can be of mixed format — Word, Excel, PDF, etc. and still be assembled into the same Binder.

The program can automatically generate a Table of Contents and cross-document bookmarks. You can use your own standard Table of Contents template to generate the TOC. You can then save the Binder project to a network location or to a Document Management System.

Lastly, the Binder is not fixed — you can add or delete documents from the Binder or change the order just by moving them up and down on the screen, then regenerate the table of contents. For firms that commonly generate this type of information — real estate closing binders, litigation trial exhibits, etc. — this is a great function.

INTEGRATION WITH DOCUMENT MANAGEMENT SYSTEMS

As more and more firms move toward a paperless environment (or paperLESS, to use Ross Kodner's term), the issue of scanning workflow becomes increasingly critical. If you are just scanning a few documents a day, it really doesn't matter. But if you want to scan every piece of paper that comes through the door — or even close to it — even small savings in time can add up to a major amount of time.

In addition, when you start scanning any significant volume of documents, the need for a full-fledged document management system such as Worldox, Interwoven's Worksite, or Hummingbird (Docs Open) becomes overwhelming.

Luckily another one of pdfDocs Desktop's stand out features is that it integrates with document management systems such as Worldox, Worksite, or Hummingbird, as well as a number of other products. This enables you to save processed documents directly to the document management system, as well as opening and converting documents from the DMS.

I tested it using Worldox. When you save a document to Worldox, you can set pdfDocs Desktop so that the original copy of the document is deleted. This gets around the issue of accumulating massive amounts of scanned documents and using Save As to get them somewhere else — what happens to the original document? When you save a document into Worldox, you are presented with the option to save it as a new document, a new version of an existing document, or as a "related" document, linking it with an existing document. Since Worldox will not accept a PDF file as a "version" of a Word document, relating the two can be very useful.

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To get a document into pdfDocs Desktop, you can either drag and drop it onto the Organizer screen, or select "import" and then import either from a specific file using Windows Explorer, or select "import from Worldox" to bring up the Worldox interface (or similar with other Document Management programs). Binder integration currently works with the latest versions of Interwoven Worksite and Hummingbird; the Worldox integration should be available in a month or so.

GRADUATING TO AN INDUSTRIAL STRENGTH SOLUTION

There are three logical steps when you scan a document: (1) scanning the document; (2) OCR'ing the document; and (3) saving the document to the DMS or elsewhere. For some documents you can omit step two, but if you want the resulting document to be searchable, you need to OCR it, and this is the most processor-intensive and time-consuming piece of the equation.

So to the extent that you can off-load parts of this process to a background or automated function, you can save significant amounts of time.

Firms might want to splurge on one or two copies of Acrobat, but rely on pdfDocs Desktop for the rest of the workstations.

Other products typically offer the ability to scan to a "watch" directory, so named because the software "watches" for new files to be scanned into that directory and then OCRs them on the fly, in the background, or overnight. DocsCorp offers its pdfDocs OCR Server which performs a similar task.

In this scenario, you would scan documents to a specified directory, the OCR Server OCR's them in the background, and shoots them over to the pdfDocs Desktop. Depending on the speed and memory of the server, the program can OCR multiple documents at the same time. Since the OCR process takes longer than the scanning process,

this mitigates the issue of falling further and further behind. With any volume, automating the OCR process can save you huge chunks of time, easily paying for the additional hardware and software. Generally speaking, the crossover point where this solution becomes more cost-effective than other solutions is around 5 users or so.

Having the OCR Server also resolves the problem of converting OCR'd documents to Word — the conversion generally produces a usable Word document.

CONCLUSION

All in all, pdfDocs Desktop by itself can serve as an adequate substitute for Acrobat Professional (and at \$125, a lot less expensively). DocsCorp also provides a trial version so you can "test drive" the product.

Firms might want to splurge on one or two copies of Acrobat, but rely on pdfDocs Desktop for the rest of the workstations. And if you plan on doing a lot of scanning, the pdfDocs OCR Server is also worth a serious look.

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DOCSCORP'S RESPONSE

We invited DocsCorp to respond to this TechnoFeature. Kerry Carroll, Marketing and PR Manager for DocsCorp, responded as follows:

"Firstly, I would like to thank John for taking the time to review pdfDocs Desktop 2.1.

"pdfDocs OCR Server is part of our pdfDocs Solutions Suite of products and is priced at \$3000 for the server and \$20 per OCR client workstation license. While this might be considered "substantial" for solos or small firms, only one server is required for hundreds of users.

"The benefits of our Server-side processing are that the solution is easily scalable to the needs of any size law firm and multi-processing technology (MPT) ensures efficient handling of up to 20 simultaneous jobs. User's machines are not OCR processing so they are free to continue productive work rather than be tied up processing OCR jobs.

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Also, automated OCR workflows can be supported without user interaction.

“John indicated that you can only import documents from the Organizer workspace into the Binder area one document at a time. In fact, you can import multiple documents from the Organizer into the Binder using the new multi-select function in the Organizer.

“If you are attending LegalTech NY and would like to see a demonstration of pdfDocs Desktop or any of our products, please visit us at booth 2620.”

ABOUT THE AUTHOR

John Heckman has been assisting law firms with technology issues for over 25 years. Heckman Consulting is a software integration firm specializing

in Amicus Attorney, PCLaw, Worldox document management, Time Matters, HotDocs and other legal-specific software. It services the greater New York area and clients range from solo practitioners to AmLaw 100 firms. Check out John's blog at www.doesitcompute.typepad.com or the Heckman Consulting Web site for newsletters and other useful information at www.heckmanco.com.

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