Adobe Acrobat DC for enterprise migration guide

A project management guide for moving from serialized licensing to Acrobat DC for enterprise (named user licensing)

Adobe Acrobat DC with Document Cloud services is the complete PDF workflow solution, combining Acrobat desktop software with the Acrobat Reader mobile app and Document Cloud services to improve productivity and efficiencies throughout your organization.

Because Document Cloud services require a login, IT must undertake a project to migrate to named user licensing to deliver these benefits to their end users.

Executive summary

Adobe Acrobat DC includes Adobe Document Cloud services that allow an enterprise staff to improve productivity. Use of these services requires named user licensing (sold through the Adobe Value Incentive Program (VIP) Plan), which is a change for most enterprise organizations where serialized licensing is the norm.

This implementation guide provides a framework for migrating from serialized licensing to Acrobat DC for enterprise (named user licensing) using a project management approach that aligns tasks and milestones to project stakeholders.

Need for faster processes

Organizations are looking to engage in a digital transformation, moving manual and paper-based processes into comprehensive digital capabilities. This means departments across organizations are seeking solutions to help increase operational efficiency, reduce the risks associated with human error, and create intuitive end-to-end digital experiences.

Increased efficiencies and cost savings with Acrobat DC

Acrobat DC enables IT efficiencies with easier PDF software administration, including license management, deployments, updates, and upgrades. Employees also save time by making document-intensive processes quicker and more seamless using tools to organize PDFs and improve end-to-end document workflows. And now we have the stats to prove it. Forrester Research completed a third-party benchmark study measuring the effectiveness and total economic impact of Acrobat DC. Read the study.

50 hours saved per user per year

300 IT hours saved per year

272% ROI

Source: Forrester TEI Research, May 2017

Moving from serialized licensing to Acrobat DC for enterprise (named user licensing)

This step-by-step guide will help you move from serialized licensing to Adobe Acrobat DC for enterprise (named user licensing). Refer to the following pages in this migration guide for specific instructions and background information for each step.

1. Set up the Admin Console (see pages 5–7).
2. Configure the proxy and firewall settings (see page 5). To ensure that users can sign in to Acrobat DC for enterprise, configure your firewall and proxy servers to enable connections to Acrobat web service endpoints.
3. Configure single sign-on (SSO) or another identity (see pages 4-6).
4. Set up users and groups (see pages 6–7). To ensure continuous Acrobat availability and functionality, set up your users and groups via the Admin Console. You can invite users to your organization, add them to groups, and assign licenses.
5. Remove existing serial licenses. If Acrobat was installed as a standalone product, see Migrating serialized to named user installs.
6. Uninstall previous versions of Acrobat. All deployment methods require removing existing licenses from deployed machines. Uninstalling the product is also required when the following is installed: Acrobat 11.x, Acrobat DC Classic track, or Acrobat on Mac OS. For scripts or command line, see Migrating serialized to named user installs.
7. Deploy Acrobat DC (see page 9-10).
8. If using virtualization, see Adobe's documentation for each of the virtualization methods. They are all supported under the named user model and include Microsoft App-V, VMware Horizon, Citrix XenApp and XenDesktop, and Microsoft Windows Terminal Server (see page 11).
9. Have users sign in to authenticate their license using the identity system IT has chosen.

Your Project: Migrating from serialized licensing to Acrobat DC for enterprise (named user licensing)

Migrating your organization to named user licensing is best handled by taking a project-based approach. The first step is to identify the stakeholders for the project.

Your internal team

A successful implementation of Acrobat DC for enterprise will require multiple project stakeholders, a cross-functional team that can commit their time and effort to this project. The titles of individuals in your organization may be different. In some cases, a stakeholder may take on multiple roles.

Stakeholder	Function
Project Lead	Defines the Acrobat DC for enterprise project and ensures that the project is effectively resourced. The Project Lead is responsible for recruiting team members, allocating resources, and ensuring the project is ultimately successful. Generally speaking, the Project Lead is a member of the IT Desktop team.
Procurement	Ensures that needed software and services are contractually available to the organization.
IT Desktop team	The IT Desktop team is responsible for end-user desktop computing. In most organizations, IT Packaging and IT Deployment fall into the IT Desktop team.
IT Packaging	Creates Adobe installation packages. In many organizations, the IT Packaging, IT Deployment role is part of IT Desktop.
IT Deployment	Pushes Adobe installation packages to user desktops and manages updates.
IT Security	Vets the Acrobat DC for enterprise solution to ensure that organizational security requirements are met.
IT Developer	Develops and tests solutions. Possibly uses the Admin Console User Sync Tool to automate tasks.
IT Network	Manages and maintains network access, servers, DNS.
Identity Management	Implements federation (single sign-on) for named user licensing.

Your reseller and Adobe team

Adobe and our partners are committed to your success with Acrobat DC for enterprise. The following stakeholders can assist you.

Reseller Account Executive (AE)	Manages overall relationship with Adobe. Works with your organization to ensure that the right products and services are available for your success.
Adobe Onboarding	Dedicated Adobe technical resource who introduces your organization to Adobe enterprise tools and resources and assists with getting you up and running.
Enterprise Technical Support	Available via phone, email, and the Admin Console, this support team offers prioritized support for enterprise customers.
Expert Services	Offers in-depth, how-to help for deployment, Admin Console, and other IT and end-user help via a calendar appointment.

What are Adobe Expert Services?

Expert Services are 30-minute sessions available via phone or web conference, offering how-to help, workflow consulting, and advice for your end users. Your VIP Agreement with an Acrobat DC for enterprise subscription offers an unlimited number of these sessions, which may be booked via the **Admin Console**.

See "Schedule an Expert Services Session on the **Admin Console**" on page 12 of this guide.

Background: Licensing types

Enterprise customers have historically deployed Adobe applications using *serial numbers*. With serialized licensing, the software is packaged with an embedded serial number and deployed to end-user workstations. Serialized licensing doesn't allow users to access Adobe online services, mobile apps, or modern workflows such as collaboration.

Subscription licensing or named user licensing allows you to provide end users access to the apps and services they demand for ongoing projects, while establishing the control that IT needs to meet the requirements of the organization. IT also benefits from a simpler method to maintain compliance (no need to track serial numbers or count installations) as well as management of licenses and services through the Admin Console.

Pfeiffer Consulting completed a third-party study that includes analysis covering key aspects of Acrobat DC apps and services, in particular named user licensing.

Read the study

What is named user licensing?

Named user licensing is a software licensing model where software is assigned to an individual instead of a serial number or a device. Users sign in with a credential, such as an email and password, upon launching Acrobat DC for enterprise, and this credential activates the software. Adobe supports three identity types as listed below.

Federated ID
Federated ID is created, owned, and managed by your organization. Authentication is provided by your enterprise directory via federation. The organization manages credentials and processes single sign-on (SSO) via a SAML2 identity provider. End users do not control login name or password. Software and service entitlements are restricted to what is assigned by the organization.

Enterprise ID
Enterprise ID is created, owned, and managed by your organization. Adobe hosts the Enterprise ID and performs authentication, but the organization maintains the Enterprise ID. End users do not control accounts. Software and service entitlements are restricted to what is assigned by the organization.
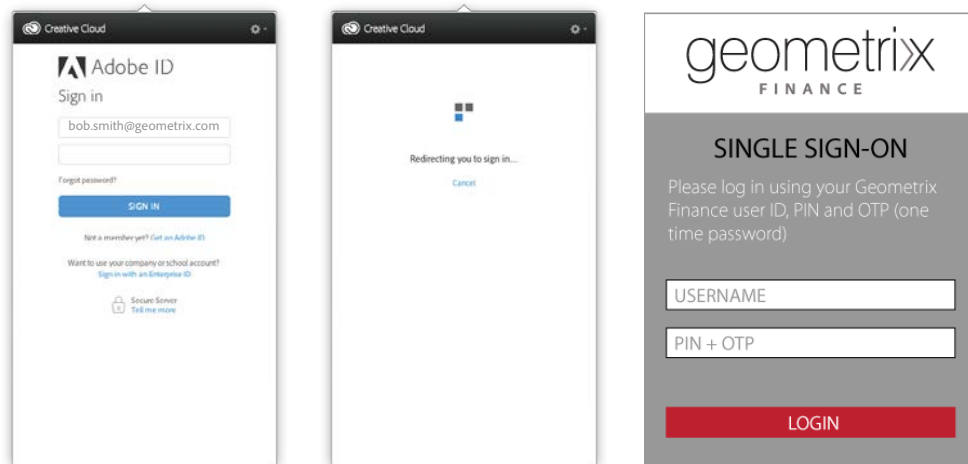
Adobe ID
Adobe ID is created, owned, and managed by the end user. Adobe performs the authentication and the end user manages the identity. End users retain complete control of their account. Additional software and service entitlements can be added by the end user outside of the organization's control.

Recommendation: Use Federated ID

Adobe recommends using Federated ID because it reduces IT workload and offers the best security. Users access cloud services using their standard organization credentials, and IT won't be burdened with lost password requests. If a user leaves your organization, the user's ability to access applications and services ends automatically. Organizations that are not using SSO should use the Enterprise ID type.

Single sign-on

When signing into the Acrobat DC desktop app, users simply enter their corporate email address on the sign-in screen. Since Adobe knows which domains have been claimed by our customers, once the end user presses Tab or clicks in the password field, they are redirected to your organization's single sign-on screen.

When, if ever, should my organization use Adobe ID?

Generally, we recommend you use Enterprise ID or Federated ID for maximum control, automation, and security. However, if you don't give contractors or vendors an email address in your organization, then you can temporarily grant software licenses to these users with an Adobe ID. The Admin Console allows IT to enforce the organization's password policy on that Adobe ID and grant any Adobe software licenses the end user might need for an assignment.

Admin Console

The Admin Console is a browser-based tool, hosted by Adobe, that allows IT staff to create and manage accounts and grant access to Acrobat DC for enterprise with Document Cloud services. It also provides access to Help and support for issues concerning licensing, deployment, and account management.

The bulk of the work needed to migrate to named user licensing requires the Admin Console.

The Admin Console URL is https://adminconsole.adobe.com.
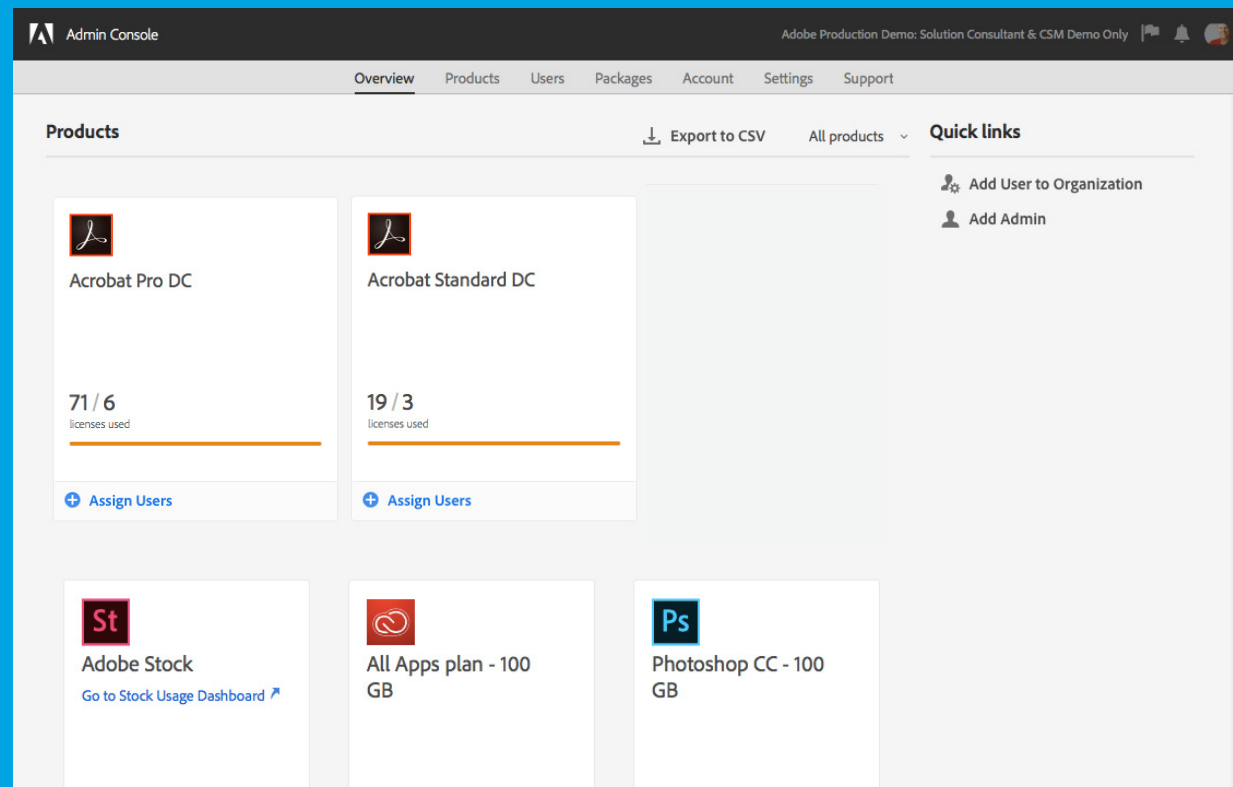
The Admin Console

Administrative roles

The Admin Console enables fine-grained management controls and allows provisioning for the following roles.

Role	Description
System Administrator	Super user for the organization; capable of full administration on their own. Also able to delegate administration privileges to other users.
Product Administrator	Administers a single product profile description, service configuration, and users. Product Administrators can add or remove users from product profiles. They can add users to organizations, but not remove them. Product Administrators cannot import users in bulk.
User Group Administrator	Administers a group of users and their associated entitlements, such as a group that might use Acrobat Pro or Acrobat Standard.
Deployment Administrator	Creates and manages product deployment packages.
Support Administrator	Enters and tracks support cases for IT admins and Expert Services.
Product Profile Administrator	Manages assigned product profiles, which are custom groupings of products. They can add users and user groups to the organization and assign or revoke product permissions for those users and groups for the assigned product profiles.

Firewall and proxy services

To ensure that users can sign in to Document Cloud, configure your firewall and proxy servers to enable connections to Acrobat web service endpoints.

For customers using Acrobat in the context of Adobe Creative Cloud, see also Creative Cloud for enterprise network endpoints.

Federation (SSO) setup

Most enterprise organizations will choose to set up federation for Acrobat DC. For Federated ID to work properly, it must first be configured for the organization. This process includes the following steps:

1 Claim a directory

This procedure validates the organization as the authority for the domain and SSO. Your organization can claim multiple domains if needed.

See How to Claim a Domain

2 Configure SAML settings

If you already have SSO via a SAML 2.0 identity provider, then you can connect to Adobe as a service provider. Adobe uses Okta to power its service provider interface.

See Configure SAML Settings

3 Activate Federated ID

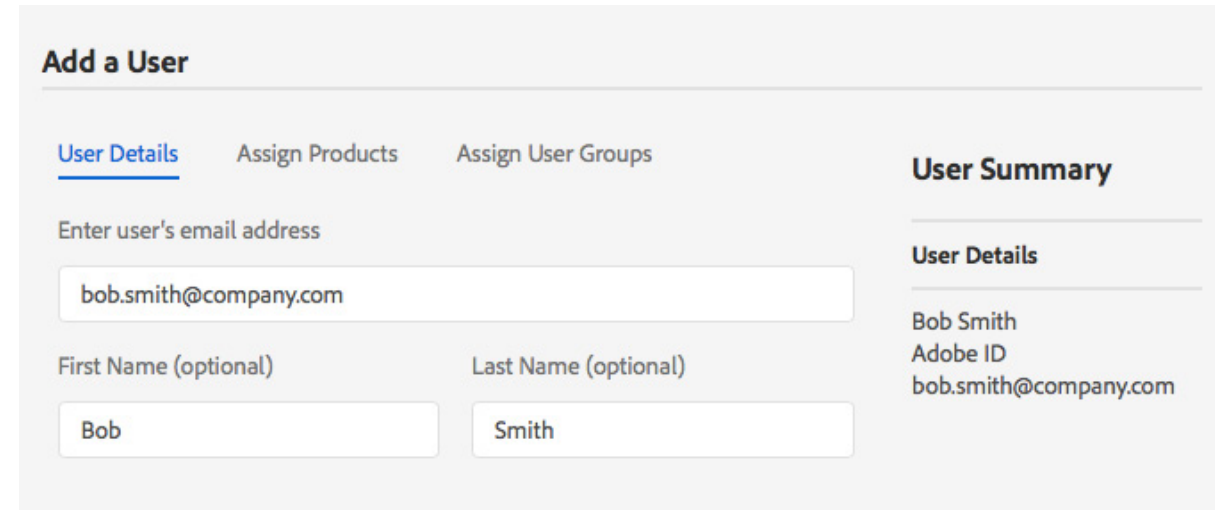This final step turns on federation and activates it for your organization.

Adding users

Once federation is set up, you can add your organization's users to the Admin Console.

Users may be added:

- Manually, one at a time
- In batches, by uploading a comma-separated values (CSV) file
- Programatically, via the User Management API
- In constant sync with your user directory system, via the User Sync Tool

Adding users on the Admin Console

User notifications

Every product profile includes a user notification setting that controls the experience for your users when you assign software licenses. Choose from one of these two options:

- On: Choose this option if you want your users to receive the standard email notifications when they are added to or removed from a product profile. These notification emails cannot be customized.
- Off: Choose this option if you'd rather send a customized or personalized email notification. For example, if you want to include information about internal training resources, this could be a good option.

User Sync Tool

The User Sync Tool allows you to automate the process of creating users and product assignments and keep them up-to-date in the Admin Console by syncing with information from your organization's Active Directory.

When User Sync runs, it fetches groups from your company's Active Directory (or other open LDAP directory service) and compares them to the list of users within your Admin Console. User Sync then makes one-way adjustments to your Admin Console to match your Active Directory.

The operation of the tool is controlled by local configuration files and command invocation parameters that provide support for a variety of configurations. You can control, for example, which users are to be synced, how directory groups are to be mapped to Adobe groups and product profiles, and a variety of other options.

Typically, an enterprise runs the User Sync Tool as a scheduled task to periodically update user information and group memberships in the Adobe User Management system with the current information in your enterprise LDAP directory.

The User Sync Tool is a customizable, open source tool and is available on Adobe Github. Learn more about setting up User Sync.

When is it a good idea to leverage the User Sync Tool?

- You wish to automatically onboard and offboard users.
- You have a large number of users.
- Your workforce turns over frequently.
- You wish to manage entitlements from your enterprise directory as a single source of truth.
- You wish to integrate your own user management system to manage software entitlements on the Admin Console.
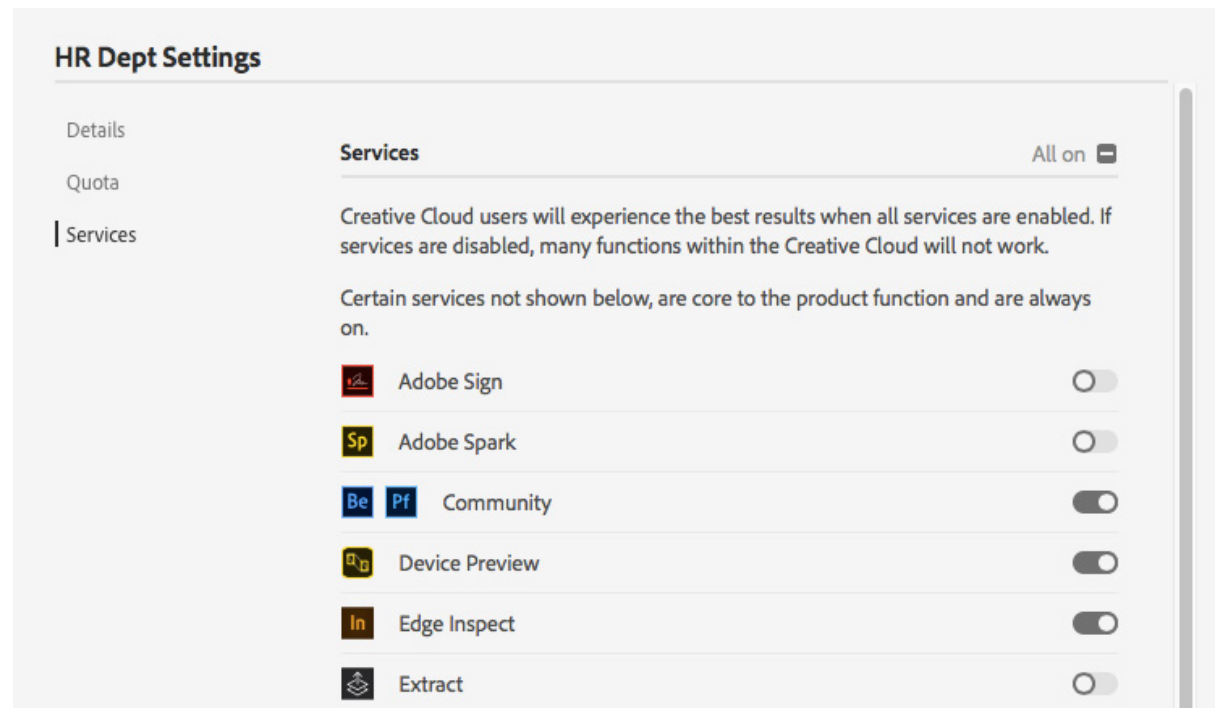
Product profiles

For a user to be entitled to use a product or a service, the user needs to be assigned to a product profile either directly as a user or indirectly as part of a user group.

Organizations may wish to create multiple product profiles:

- To segregate users based on geography, business unit, or department
- To separate responsibility for managing users in a product profile
- To enable or disable individual cloud services uniquely for different user groups

When you assign a plan that includes storage and services, you can choose to enable or disable several configurable services for that product profile. Enabling and disabling services defines which services the users of the product profile can or cannot access.

For Acrobat DC, the enterprise plan includes services and integrations such as Adobe Sign and PDF services.

Configuring services for a new product profile on the Admin Console

Multiple product profiles per entitlement are possible

It's worth noting that your organization may need multiple product profiles per entitlement. For example, you may wish to allow one set of users to have access to Adobe Sign and disallow this service for a different group.

Document Cloud Services, included in your Acrobat DC subscription

Services are configurable and may be enabled or disabled based on the product profile. More details about these services is available online.

- Adobe Sign—Send, sign, track, and manage signed documents.
- PDF services—Essential PDF tools to store and share files online, as well as create, combine, export, organize, fill and sign, and share and track documents on mobile or in a web browser in addition to desktop.

User groups

A user group is a collection of users that is administered by a user group administrator.

User groups may be assigned to one or more product profiles.

Note that user group administrators cannot create product profiles. Their role is solely to maintain a list of users and assign product profiles to them. A user group administrator can create users, but cannot delete them.

Understanding Asset Settings

To help protect sensitive information, you may wish to limit sharing of documents via Document Cloud.

It is important for IT to understand that external sharing, including anonymous public links, is turned on by default for your entire organization.

IT can choose from one of three Asset Settings for the organization.

Asset Setting	Description	Best for...
No restrictions	Users can share and collaborate with users inside the organization, and with the public.	Organizations that trust their employees to have freedom, control, and access to every Document Cloud feature.
No public link sharing	Users cannot create public links.	Organizations that want to prevent accidental public (anonymous) sharing outside the organization. Note that your users can still collaborate with invited individuals identified by email.
Sharing only to domain users	Users cannot create public links and can only collaborate with people from trusted, claimed, and whitelisted domains.	Recommended for organizations that need tight control over which specific domains can access organization assets. Collaboration is only possible with other users in your organization or those from designated (whitelisted) domains.

Asset Settings only apply to users in your organization with Enterprise IDs or Federated IDs. It is not possible to control what users with an Adobe ID can share.

See the "What is named user licensing?" section on page 4 of this guide to learn more about the three different identity types supported in the Admin Console.

Services affected by Asset Settings

Enabling **No public link sharing** or **Sharing only to domain users** turns off ALL public sharing features.

Document Cloud application	Features that are turned off
Acrobat and Acrobat Reader desktop apps	Share (formerly Send and Track)
Web services (cloud.acrobat.com)	Share (formerly Send and Track)
Adobe Document Cloud for Outlook plug-in	Share (formerly Send and Track)
Mobile apps (including Acrobat Reader and Adobe Scan)	Share Link, Share Document Cloud Link

Changing Asset Settings

To choose a restrictive **Asset Setting** for your organization, do the following:

In the Admin Console, navigate to **Settings > Asset Settings**, and then choose the Sharing Options required.
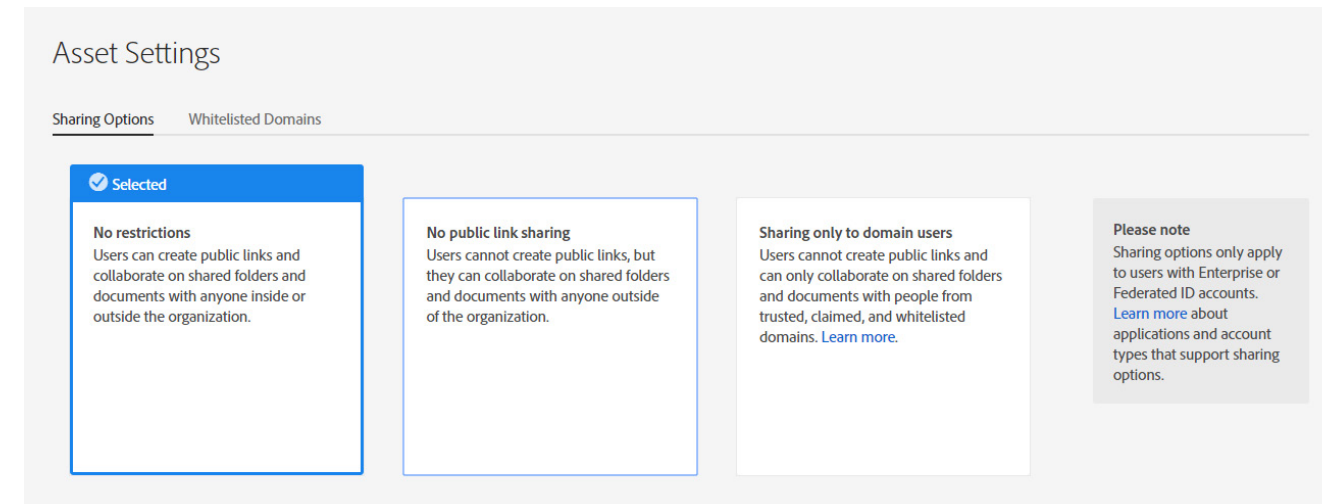
If you are applying more restrictive Asset Settings to an existing organization, you could affect business continuity. Adobe recommends that you discuss the impact with your teams before changing settings.
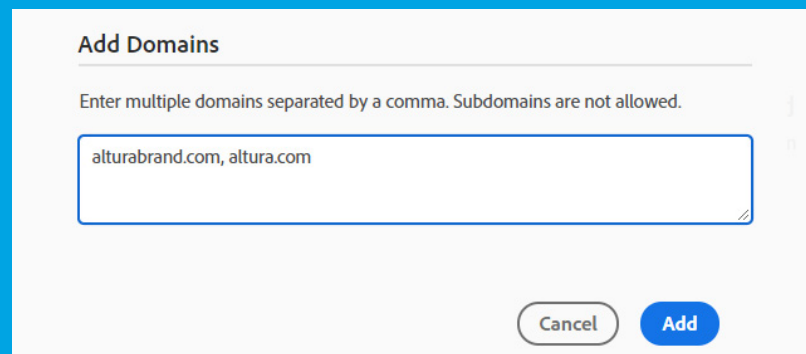
Read this documentation for important details.

Whitelisting domains

If you choose the **Sharing Only to Domain Users** option, you can control the list of email domains with which it is safe to collaborate.

1. In the Admin Console, navigate to **Settings > Asset Settings**.
2. To add domains, click **Add Domains**.
3. Enter the domains in the **Add Domains** dialog box. You can add up to 300 domains separated by commas.
4. Click **Add**.

Note: You cannot whitelist subdomains. For example, west.example.com and east.example.com are subdomains of the example.com domain.

Content Logs

The system administrator can download detailed reports called Content Logs from the Admin Console. These reports give information on how end users are working with corporate assets.

As end users interact with the assets, the details are recorded in log files. You can export these log files to track actions that users perform on the Creative Cloud and Document Cloud assets owned by your organization. As you move more assets into Adobe's cloud storage solutions, your coverage becomes more robust and meaningful.

You can only track assets managed by your Enterprise ID and Federated ID users. Assets managed by users with Adobe IDs are not included, because legally, the individual users own these assets, not your organization. For complete information, see this documentation.

Providing Acrobat DC for enterprise software to your end users

Once users have been imported into the Admin Console and assigned to a product profile, you will need to deploy the desktop apps to your end users. There are two methods for doing so, and each option offers varying levels of control for IT admins and autonomy for end users.

Managed deployment

- Offers IT maximum control but requires the most work
- You need to strictly control which software and updates are available to users.
- You have the resources to package and deploy apps, patches, and updates on a regular basis.
- Available for Creative Cloud and Document Cloud

Self-service

- Reduces IT workload but users must be admins on their computers
- You wish to reduce IT workload and avoid packaging apps and updates.
- You don't need to vet software releases before they are available to your end users.
- Available for Creative Cloud and Document Cloud

More IT control
More IT work
More consistency

More autonomy
Less IT work
Faster adoption

The Creative Cloud desktop app is used by end-users with admin or elevated privileges to install and update entitled Creative Cloud applications, which can include Acrobat DC. Users can also install and maintain older versions if they need compatibility with older systems or plug-ins.

Creating packages for enterprise deployment

Whether you choose to give your users self-service access or to manage software deployment for your users, the Admin Console gives you tools to build customized installer packages to meet the needs of your organization. Log in to the Admin Console, click on Packages, and on the left choose between packages to create your own or Adobe templates to start with a standard deployment package. Customize the settings and apps as shown in the wizard below and download the industry-standard MSI or PKG file when you're done.
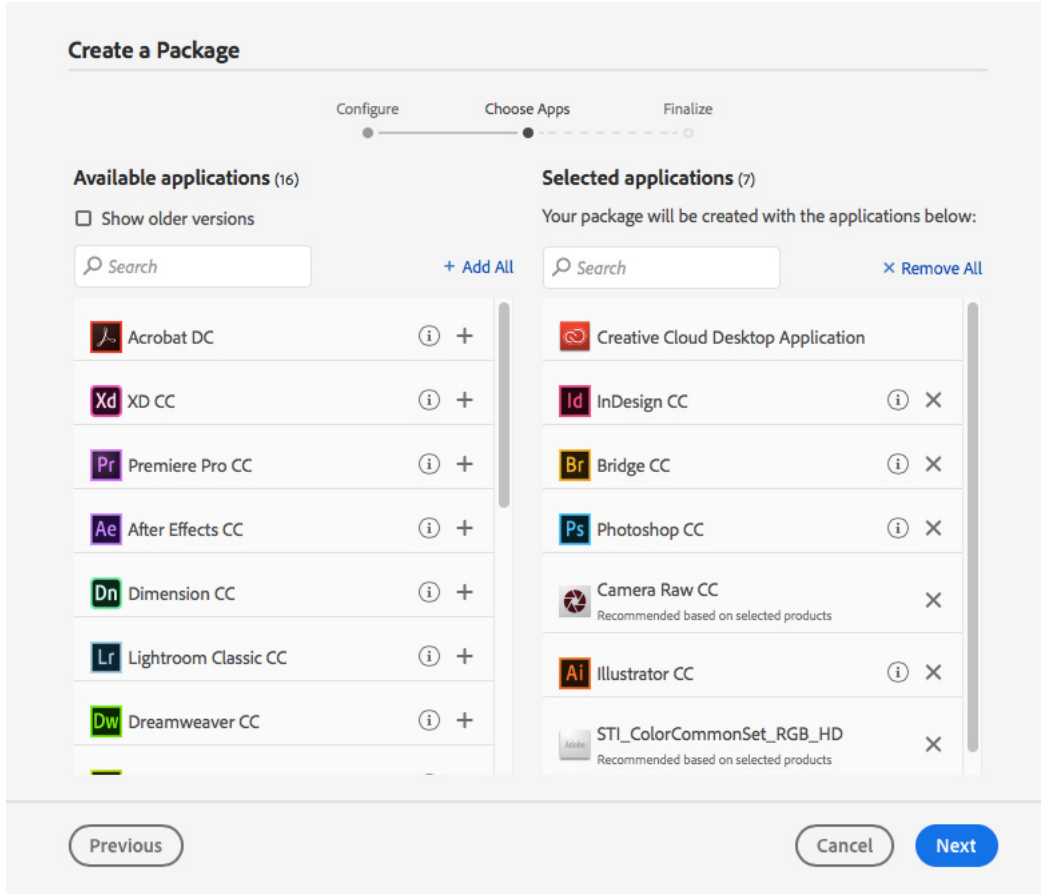
When should I use the Acrobat Customization Wizard or Creative Cloud Packager?

- You need to customize advanced settings for Acrobat such as modifying the Windows registry.
- You need to package Acrobat as part of a Creative Cloud All Apps plan.

Items that you might want to customize in an Acrobat deployment

- Common deployment options
- Customization Wizard: A scan of the UI shows some of the most common configuration options. Supressing the EULA and, configuring default PDF creation settings are a couple of the over 2,000 options that may be customized through this tool.
- Preference Reference: A dictionary of nearly 600 registry and plist preferences

Where can I obtain the Acrobat Customization Wizard or Creative Cloud Packager?

These advanced packaging tools may be downloaded from the Packages panel of the Admin Console.

Supported deployment tools

You may deploy Adobe software packages using any tool that can push down standard package types such as MSI (Windows) or PKG (Mac). Examples are SCCM on Windows and JAMF Casper Suite on Mac.

Enabling self-service

Enabling self-service is straightforward. Once an end user is entitled to the apps in a product profile, they can simply install the Creative Cloud desktop app and install the software and updates on their own.

Enabling self-service for admins

1. Log in to the Admin Console and add the user to a product profile or user group with an assigned product profile.
2. Direct the end user to go to the Creative Cloud desktop app download page.
3. User signs in to Adobe website using the credentials specified by the organization.
4. User downloads Creative Cloud desktop app installer.
5. User installs applications they are entitled to via the Creative Cloud desktop app, which can include Acrobat Pro DC.
6. User receives update notifications via Creative Cloud desktop app and installs new features and updates on their own.
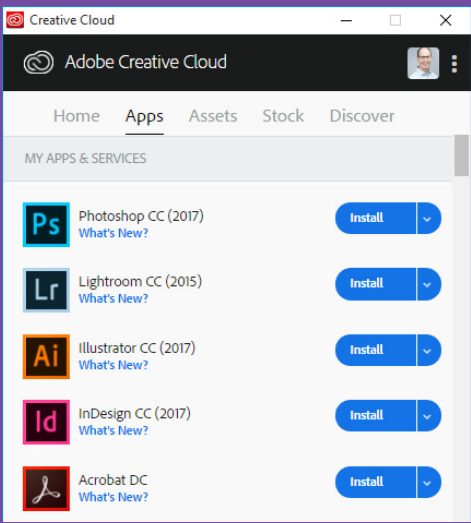
Virtualization

Acrobat products support several technologies and features that help customers work anywhere and on different devices. The following list can be used as a reference for the versions, recommended best practices, and known issues of any of these platforms. It is recommended that you read the documentation prior to pushing out your installations.

- Citrix XenApp and XenDesktop
- Microsoft Windows Terminal Server (WTS)
- Microsoft App-V
- VMware Horizon
- Roaming profiles and UE-V: Make files, data, and preferences available from any desktop location.
- Preferences synchronization: Allow user preferences to follow users across machines.
- Document Cloud services: Use online services, store files in the cloud, and place user recent file lists on any machine or mobile device.

Automation tools for deployment

Adobe provides tools that facilitate enterprise management of updates for products installed across your organization. Acrobat supports both the Adobe Update Server Setup Tool (AUSST) and the Remote Update Manager (RUM).

AUSST allows enterprise IT administrators to set up and maintain an in-house update server that synchronizes with Adobe's update servers. Client machines then download and install updates from the internal AUSST server rather than the Adobe update servers. The tool supports a command line switch (–acrobatonly) so that only Acrobat updates are synchronized. For details, refer to the AUSST documentation.

Windows: https://s3.amazonaws.com/deploymenttools-prod/AUSST_win.zip

Mac: https://s3.amazonaws.com/deploymenttools-prod/AUSST_mac.zip

RUM supports remotely invoking the Adobe Update Manager to install without having to log in on individual machines. For details, refer to the RUM documentation.

Windows: https://s3.amazonaws.com/deploymenttools-prod/RemoteUpdateManager_win.zip

Mac: https://s3.amazonaws.com/deploymenttools-prod/RemoteUpdateManager_mac.zip

Release management

Acrobat DC apps and services are updated quarterly. Your organization will need to decide how often to update the apps deployed to end users.

Some factors to consider:

Do you need to keep all users on the same versions of Adobe Acrobat DC?
Some organizations need to ensure that all users are on a particular release such as Acrobat DC version 2018.11.xx for compatibility reasons. Note that it is not possible to enforce versions in the self-service model.

Do you need to vet updates prior to release?
Organizations that rely on third-party plug-ins or have developed their own integrations may wish to test new updates before they are deployed to end users.

Are users demanding new features as they are released?
The subscription model allows Adobe to continuously develop features that will benefit end users. Users whose work requires the latest technology may need more frequent updates.

Do you wish to enable users to update on their own?
You can allow admin and non-admin users to update software on their own. Updates are downloaded from the Adobe cloud or redirected to an internal update server, and the local machine is updated.

Ongoing maintenance

Once your deployment is complete, you will need to consider how you will maintain and manage users and licenses. Some things to consider:

- Who will be responsible for adding and deleting users as they come and go in your organization? Typically, this task falls to the IT Desktop team or License Management team.
- How will you account for new licenses that are needed over time?
- What is the process users and departments will employ to request new licenses?
- As you add new seats, how will you charge back the departments that require them?
- How will you reassign licenses once a user leaves the organization or no longer needs the license?

Appendix

Download our four-week project plan

We've created a customizable Excel spreadsheet for you that includes all the tasks required to implement Acrobat DC for enterprise in your organization. The table includes numbered steps that assign specific tasks to project stakeholders.

Get the Excel file.

At critical junctures, we suggest that you reach out to Adobe Expert Services.
Our Expert Services staff can provide the specific guidance you need to be successful.
See "Appendix: Schedule an Expert Services session on the Admin Console."

Once your project is completed, you will be able to offer your users a comprehensive business platform that starts with Adobe's industry-leading desktop and mobile apps and unlocks modern workflows across devices, projects, and teams.

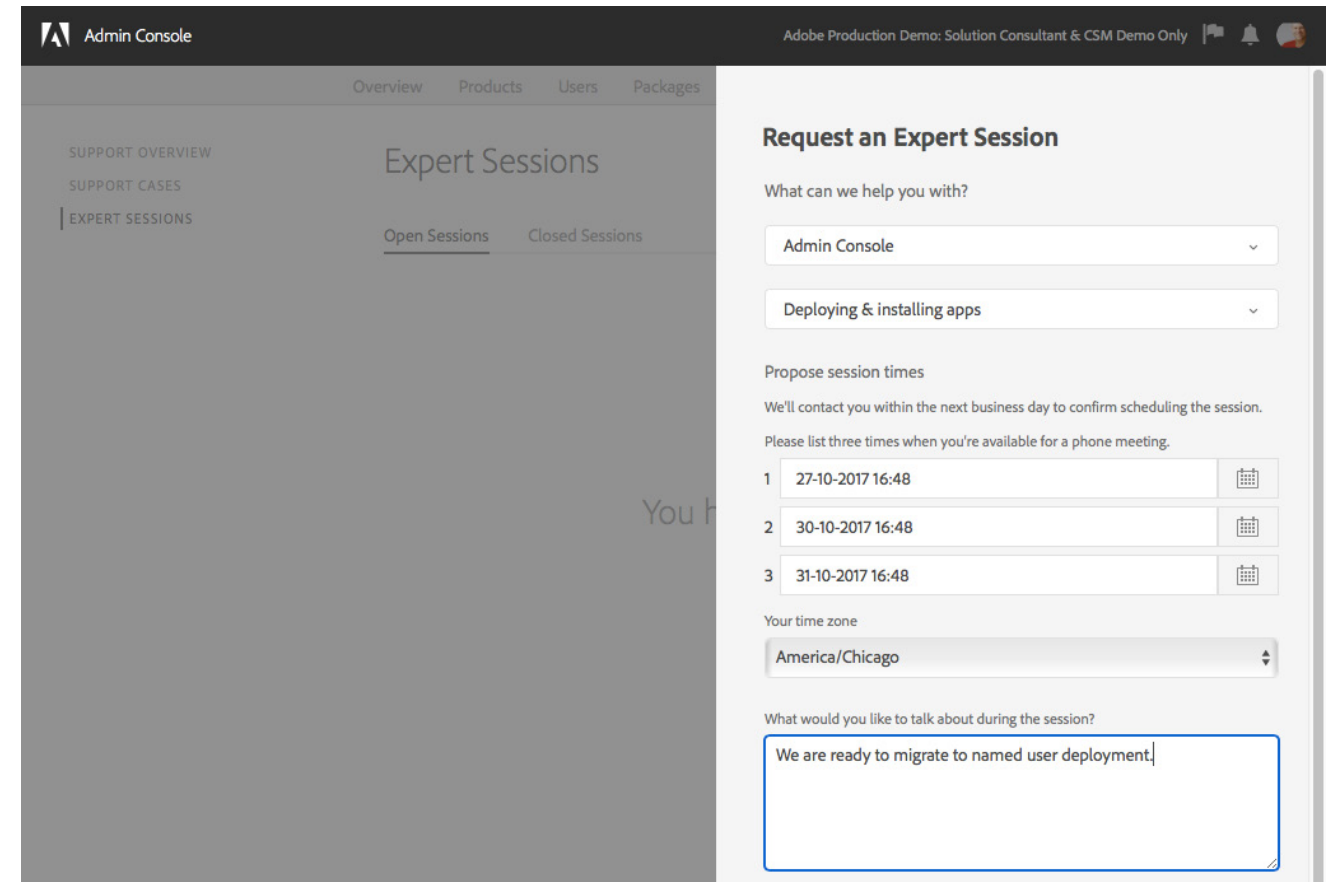**Who has access to Adobe enterprise support?**
System administrators are automatically a "support delegate" with the right to contact Adobe, open support cases, and schedule Expert Services sessions. System administrators may also delegate this right to others by making them a support delegate.

Schedule an Expert Services session on the Admin Console

You should have received an overview of the Admin Console during your onboarding call, but you can also schedule a 1:1 virtual session with Adobe deployment experts if you need more help completing the project.

Here's how to schedule an Expert Services session on the Admin Console:

1. Log in to the Admin Console at https://adminconsole.adobe.com/enterprise.

2. Click the Support tab at the top.

3. Click Expert Sessions on the left and then click New Session on the right. Complete all the fields and click Request Session.

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