



Digitizing financial onboarding workflows.

AFTIA helps a multinational financial services company better serve clients by accelerating client onboarding with Adobe apps and APIs.



Established
2015

Employees: 45
Ottawa, Canada
www.aftia.com

7K

Hours of form development time saved by eliminating manual efforts and encouraging reuse

Products:

[Adobe Document Cloud](#)
[Adobe Acrobat Services](#)
[Adobe PDF Extract API](#)
[Adobe PDF Embed API](#)
[Adobe Acrobat Pro](#)
[Adobe Experience Manager Forms](#)

Objectives

Support digital transformation at a multinational financial services company

Minimize time and resources required to digitize documentation in a highly regulated industry

Use fragments to encourage greater consistency and faster updates to comply with regulations

Develop easy-to-use tools to encourage adoption and scale

Results

Accelerates content extraction of 1,000 PDF forms to structured JSON for content reuse

7,000 hours of form development time saved over 3 years by eliminating manual efforts and reusing fragments

Transforms **and compares PDF with 300 fragments in seconds**

Enables previews of the PDF form to **quickly highlight and review potential fragment matches**

Digitalization can be a big benefit to companies as they look to improve employee productivity and serve customers quickly. For companies in highly regulated industries, such as education, healthcare, government, and finance, the amount of paperwork involved makes digitalization even more challenging, but it also offers much greater potential for savings related to effort with associated costs and a reduced time to market.

That's why many companies turn to AFTIA to transform their processes. AFTIA specializes in delivering innovative tools and solutions to streamline, automate, and secure workflows for organizations across North America, including many Fortune 500 companies.

Jeff Stanier, Chief Strategy Officer at AFTIA, believes that the company's expertise in workflow and document management is what sets it apart. "We work closely with vendors like Adobe and Microsoft to devise the best strategies for every customer," says Stanier. "It's our close relationships and deep knowledge of their technology that enable us to piece together advanced solutions for any client's digitalization efforts."



When Stanier started working with a major multinational financial services company, the organization had already made the decision to switch to Adobe Experience Manager Forms for responsive online forms powered by fast, automated data collection workflows. But with nearly 1,000 PDF forms already in use by the company, unlocking the content from existing forms and establishing a way to manage future forms was a huge task.

To overcome the challenge, AFTIA created Informer, a custom tool built using Adobe PDF Extract API and Adobe PDF Embed API, part of Adobe Acrobat Services. Using this tool, the financial services company can take advantage of the fragments capability in Experience Manager Forms to accelerate form creation and improve consistency.



"Using the Informer tool powered by Adobe Acrobat Services, form managers can quickly identify fragments, leading to more reuse, greater consistency, and faster form creation."

Jeff Stanier
Chief Strategy Officer, AFTIA

Powering fast, consistent forms with APIs

The financial services company uses forms for almost every client interaction, from setting up an account to designating beneficiaries. Forms can contain anywhere from one to 40 pages.

Previously, hundreds of forms existed as flat PDF documents built in Adobe InDesign. Now most of them are available as fillable forms which are much easier for clients to complete and return. By connecting them to backend systems, advisors can even pre-fill information to streamline documentation even further while improving accuracy.

While there were many reasons why the financial services company turned to Adobe for online forms — easy creation, mobile-friendly templates, a rich library of connectors — the company was particularly interested in the support for fragment-based authoring. Using the fragment capabilities, form managers can turn frequently used text and fields, such as legal disclaimers or address blocks, into reusable elements. Updating the fragment once applies the changes across forms, keeping them consistent and compliant with a click.

But with so many forms available, form managers had difficulty keeping track of fragments. In general, managers would need to memorize the more than 300 fragments available in the fragment library.

“With little information to share about fragments, the company had difficulty training more people to scale form management,” says Stanier. “It asked us to come up with an easier way of identifying fragments. We found exactly what we needed with Acrobat Services.”

There are many ways of comparing two PDF documents, including the compare feature in Acrobat, but there were no solutions that could compare and discover common content within those documents. The PDF Extract API removes the visual layer, automatically converting existing PDF forms into structured JSON files. AFTIA then created the Informer tool to compare the structured JSON file to JSON representations of existing fragments. If the tool detects a possible match, it displays the confidence level between the form and fragment.

The form manager can then click on the interface to see a preview of the PDF document displayed using PDF Embed API. The previewed PDF highlights the potential fragment match so that the form manager can quickly compare results.

“The artificial intelligence from Adobe that powers text recognition does a fantastic job to accurately transform existing PDF documents into JSON for easy comparison,” says Stanier. “Using the Informer tool powered by Adobe Acrobat Services, form managers can quickly identify fragments, leading to more reuse, greater consistency, and faster form creation.”

“One form manager told me that Informer is now an indispensable part of the form creation process, saving more than 7,000 hours of development time by eliminating manual efforts and encouraging reuse of fragments.”

Jeff Stanier
Chief Strategy Officer, AFTIA

Saving hours of development time per form

The Informer tool now acts as a key step in the form creation and migration process. Before migration, the form manager meets with the content owner as well as the legal and compliance teams to review the form. Using Adobe Acrobat, these stakeholders easily mark it up with questions and suggestions, share feedback, and compare different versions. Once the form is reviewed and updated, it's saved as a PDF and processed through Informer to identify potential fragments. The PDF can be printed as is, but it is also converted into a fillable online form.

"By optimizing content and taking advantage of fragments, the company is creating a consistent end-user experience while establishing an environment that allows them to make regulatory and compliance changes quickly," says Stanier. "One form manager told me that Informer is now an indispensable part of the form creation process, saving more than 7,000 hours of development time by eliminating manual efforts and encouraging reuse of fragments."



"There's nothing else on the market like Acrobat Services to unlock document workflows."

Richard McIlroy
CEO, AFTIA

Consistency across all documentation

The number of forms used by the financial services company continues to grow, in part due to growth through acquisitions. Using the Adobe apps, the company has picked up the pace of migration, quickly working through its library of hundreds of forms. The company also hopes to find other applications for the Informer. Since any type of document can be converted to PDF, including HTML and Word documents, Informer can be used to find matching text and encourage consistency across all documentation.

AFTIA believes that many other customers can benefit from using the Informer tool to encourage repeatable, reusable content.

"Adobe is the engine behind this streamlined form creation workflow, with Acrobat Services being the key that we need to fully take advantage of fragments across so many forms," says Richard McIlroy, CEO, AFTIA. "It connects multiple Adobe products together, including Adobe Experience Manager Forms and Acrobat Pro, to create a single seamless tool. There's nothing else on the market like Acrobat Services to unlock document workflows."

