



ADOBE[®] CUSTOMER
SUCCESS STORIES

INTRODUCTION

Many organisations across the world still rely heavily on paper based documents to collect information for critical business processes. Adobe's enterprise solutions enable these paper intensive processes to be incorporated into business operations to create secure, trusted, digital communication, inside and outside the firewall, whether communicating with customers, agencies or partners. Reducing IT complexity, breaking down silos of information, automating and simplifying business processes, Adobe enterprise solutions improve workflows and increase the reach of information, addressing a multitude of issues across diverse industries.

Financial services organisations are under ever increasing pressure to improve customer service, driving out errors in processes, while at the same time complying with regulatory requirements. Adobe enterprise solutions allow financial institutions to create secure straight-through processes that ensure consistency of data capture in everything from mortgage applications to loan origination and claims processing. Adobe solutions simplify processes from end to end by enabling the form to carry within itself the ability to control its use and the steps that it must follow. So, instead of creating product or channel specific interactions, it becomes possible to simply and easily create consistent, secure customer centric solutions across multiple channels including call centres, branches, online or via Independent Financial Advisors.

Government organisations around the globe face similar process challenges. Under pressure to create more open government for millions of citizens, they must capture accurate data, streamline workflows that involve people inside and outside the agency, provide more effective and secure collaboration across agencies and deliver information more efficiently to their constituents. Automating core processes, from documents and forms from citizens to requests for services and business compliance, presents enormous challenges. These include the ability to move information securely across network boundaries, integrate with enterprise applications and legacy systems as well as providing access to people with disabilities.

Manufacturing industries need to reduce administrative costs, shorten approval cycles, securely exchange information and better manage inventory. Using information from their existing core business systems Adobe solutions can automate online form management and requisition processes to achieve faster, more efficient product development cycles, automating business processes from end to end. The result is lower printing, storage and mailing costs, the generation of complete and accurate documents electronically from core systems and more secure and reliable business transactions.

Adobe's customers experience real gains for their organisation. Using our solutions our customers have increased productivity and reduced costs by digitally recreating vital documents with a familiar look and feel for the end user and aligning these with core operational processes.

What follows is a selection of customer case studies that we believe you will find interesting. We have chosen them to illustrate the wide range of uses and benefits that organisations across many different industries are already realising since implementing our solutions.



Pierre Van Beneden,
VP, EMEA

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Etheryl Working with INSEAD

Streamlining application processing at INSEAD's top-ranked MBA program using the Adobe Intelligent Document Platform

Founded in 1957 with campuses in France and Singapore, INSEAD is the number one business school outside the United States of America and number four in the world. The school has an enrollment of more than 800 MBA students who must undergo a long, arduous acceptance process.

Optimising acceptance and admission procedures is critical for the top-ranked school – the institution's performance and image depend on it. Paris-based Etheryl, an Application Service Provider (ASP) for academic institutions, won INSEAD's trust by coming up with a solution that uses Adobe solutions to digitise the INSEAD application process.

ETHERYL

www.etheryl.com

INSEAD

www.insead.edu

INDUSTRY

Education

CHALLENGES

- > Eliminate inefficiencies from application processes
- > Reduce costs to print, deliver and process prospective student applications
- > Provide applicants with greater flexibility in completing lengthy applications

SOLUTION

- > Process management
 - > Document collaboration
 - > Document control and security
 - > Etheryl is leveraging the Adobe Intelligent Document Platform to accelerate and simplify application processing at a leading international business school
-

Meeting the needs of a prestigious institution

Etheryl devised a solution that could support the lengthy application document and the proper submission procedures. Prospective students applying to INSEAD must fill out the 30-page application that covers their profile, reasons for applying, and personal achievements. They can take several months to complete it and can even share it with others.

The sheer volume of the application file, the variety of information it contains and the accompanying information exchange processes prompted Etheryl to integrate Adobe LiveCycle™ Designer and Adobe LiveCycle Reader™ Extensions solutions into the INSEAD acceptance and registration platform.

Creating a 100% digital file

“We wanted to capitalise on the benefits associated with Adobe Portable Document Format (PDF),” explains Etheryl founder and chairman Yann Lechelle, who also holds an MBA from INSEAD. “It's important for an academic institution to give applicants a widely recognised format such as Adobe PDF that is easy to read and work with.” Additionally, with Adobe LiveCycle Reader Extensions, the applications can be viewed and completed using only Adobe Reader software, which comes installed on many computers and can always be downloaded for free.

Optimising document exchange

A central element of the platform developed by Etheryl is that the intelligent Adobe PDF form guarantees data integrity and full fidelity of the application file. “Developing HTML forms was not the best solution because the printed pages did not look the same as the printed original,” says Lechelle. “With an intelligent Adobe PDF form, we've given the electronic document the same overall look – which is what INSEAD wanted – and the PDF form works the same throughout the application and registration process.”

Managed by Adobe LiveCycle Reader Extensions server software, the intelligent form streamlines the data integration on the back-end by using XML data flows. “The school's databases are structured to register only administrative information but not the essays or recommendation letter the students put in the file,” Lechelle explains.

Printing a document with full fidelity to its original presentation

Digitising all of the files and managing them by using Adobe solutions enables INSEAD to receive application documents that have been collected first at the Etheryl host site. This means the school can print documents in a format that is true to the original presentation and that conveys the image INSEAD wants to project.

An efficient service with added value

The secure exchange of data is taken into account because Adobe PDF allows electronic signatures in the document. Also, the system includes online payment of registration fees via an interface to the school's payment module.

INSEAD has achieved considerable cost savings by no longer printing and mailing the several thousand student applications handled annually and has improved overall application processing. Applicants also have the flexibility to work online or offline with the Adobe PDF files, which would not have been possible using HTML forms.

Best of all, the ease with which applicants, administrative staff and teaching staff make this solution their own clearly shows success in a world much influenced by print culture. "The application has been up and running and is already a success," Lechelle says. The rapid implementation was the key factor. "In short, Adobe LiveCycle Reader Extensions and Adobe PDF let you do things quickly and elegantly."

RESULTS

- > Optimised application process for prospective students
- > Provided students with the convenience to complete applications online or offline
- > Reduced INSEAD costs to print, distribute and process program applications
- > Ensured more consistent, professional communications with students
- > Achieved rapid success and adoption of newly automated application processes

SYSTEMS AT A GLANCE

- > Adobe LiveCycle Designer
 - > Adobe LiveCycle Reader Extensions
-

Deutsche Post

Deutsche Post uses Adobe solutions and the Web to enable reliable printing of pre-paid stamps for parcel delivery

The 'stamp' is the tip of the iceberg

Online auction house eBay has revolutionised trading in goods for business clients and private customers. Until actual shipment, all stages of the online auction – from price quotes and bargaining to payment processing – take place over the Web. If it were also possible to ship traded goods as a parcel or letter via the Internet the digital workflow would be perfect. However, as this is not possible, international logistics service providers such as Deutsche Post World Net take care of shipment and delivery of postal consignments. Deutsche Post and Adobe Systems recently introduced STAMPIT WEB, allowing customers in Germany to securely generate pre-paid stamps for letters or parcels from their home PCs and printers.

With the bundled logistics skills of its trademarks Deutsche Post, DHL and Postbank, the Deutsche Post World Net Group offer services and customer-specific solutions for managing and transporting goods, information and payment. In 1995, Deutsche Post World Net Group converted from a public agency to a joint-stock company with headquarters in Bonn, Germany. The basis for the quality and reliability offered by the company today is its modern infrastructure and the specialised knowledge of 380,000 staff working in 220 countries. Every day, Deutsche Post deals with over 70 million parcels, many of which are materials used in Direct Marketing campaigns. Where letters are concerned, Deutsche Post is the leading service provider in Europe.

DEUTSCHE POST AG

www.deutschepost.de
www.stampit.de

INDUSTRY

- > Business and consumer services
- > Postal services

CHALLENGES

- > Offer customers enhanced online services, including generating pre-paid stamps
- > Deliver online services that are easy to use for customers and require no specialised software
- > Ensure quality and security of prepaid stamps generated online by customers

SOLUTION

- > Document generation
- > Deutsche Post enables customers to generate and print quality, legally compliant stamps for posting on letters and parcels with Adobe solutions

RESULTS

- > Enhanced constituent services with easier access to Web-based stamping solution
 - > Laid flexible, powerful foundation for rolling out additional online stamping services in the future
 - > Provided additional revenue stream for Deutsche Post
-

Internet stamping: simple, safe and swift

Normally, customers go to the post office to buy stamps and then place them on letters or parcels before dropping them into postboxes. However, in the age of digital business and e-commerce, there are now simpler, more convenient alternatives for customers. In 2001, Deutsche Post was the first European postal contractor to introduce a new way of stamping, an option that is currently used on more than 80,000 PCs.

STAMPIT, the PC stamping software from Deutsche Post, allows users to perform fast and safe stamping of their mail using home PCs. The less expensive variant, STAMPIT HOME, has been available to smaller business clients and private customers since 2004. Until this time, it was always necessary for users to install software at home and to produce the stamp directly on their PC.

With the increased shift of transactions to the Web, Deutsche Post faced the challenge of providing a completely Web-based stamping solution. In cooperation with Adobe Systems Incorporated, Deutsche Post extended the service to include a Web-based solution that offers the same security features as PC-based STAMPIT solutions. Regardless of the opening hours of post office branches, STAMPIT WEB users can stamp their letters and parcels online without having to install special software. All they need is free Adobe Reader software, a standard Internet browser and a printer. Adobe Reader software is already deployed on more than 800 million computers worldwide and comes standard on most PCs purchased today.

The Adobe software solution fulfils two key requirements for Deutsche Post: security and correct positioning of electronic stamps printed on envelopes. "It is necessary to print the stamp with all other data in exactly the right position, particularly when using sheets of labels," explains Bernd Meyer, Product Manager responsible for marketing services at Deutsche Post. "Unlike other solutions we tested, there is no problem with this when using Adobe Reader software."

Adobe solutions also met the stringent security requirements of Deutsche Post. Adobe Reader Extensions Server allows the postal service to generate intelligent documents in Adobe Portable Document Format (PDF). The documents can be exchanged freely with external users without having to install special costly software. The Adobe software offers a Web-based interface that Deutsche Post can use to quickly embed rights of use and security features in PDF files. When users open the PDF file, special functions are enabled in Adobe Reader. With STAMPIT WEB Adobe Reader is used to automatically open a PDF in a separate window of the Internet browser and to print it directly.

Once printing has taken place, the Adobe Reader print function is disabled and cannot be repeated. "Adobe solutions comply with our requirements for secure and proper printing of stamps using STAMPIT WEB," says Meyer. "With Adobe, we want to further develop innovative technology in the online stamping sector. With Adobe Reader, we can also build on standard software available on virtually all PCs worldwide."

Stamping from an online postage account

To use STAMPIT WEB the customer needs to register on the Internet. This involves setting up a personal postage account that is credited by the customer for postage and can be used to pay for stamping. The purchased postage credit is charged to a customer's account by direct debit. In the introductory phase, this facility is available only to users of eBay.

To stamp an item for mailing, a customer transfers the necessary details from the auction via eBay, adds the product (letter, parcel, goods shipment) and specifies the print medium. eBay then transfers data to STAMPIT WEB. Using the data, Adobe Form Server produces a preview of the stamp in HTML, which customers can view and check in their Web browsers. When the postage is printed, the postage account is debited with the relevant amount and a matrix code generated. This detail is used by the Adobe solution, along with the address and other data, to create a consignment label in PDF. Printing takes place when the stamp is open in Adobe Reader software.

Strategic cooperation

The joint STAMPIT WEB project between Deutsche Post and Adobe Systems was set up in a matter of months. Just two weeks after the program started almost 2,000 eBay vendors registered for the service. In the future, Adobe and Deutsche Post are planning further development of the service and product scope. "Given the high level of market penetration and recognition, Adobe Systems is a key strategic partner for us," explains Meyer. "We want to make use of our shared know-how to further develop innovative technology in the online stamping sector."

"Adobe solutions comply with our requirements for secure and proper printing of stamps using STAMPIT WEB... With Adobe, we want to further develop innovative technology in the online stamping sector."

*Bernd Meyer,
Product Manager, Marketing Services,
Deutsche Post*



Merck KGaA

Merck KGaA Deutschland deploys the Adobe Intelligent Document Platform to optimise clinical trials for new pharmaceuticals

Overview

The Merck group, based in Darmstadt, Germany, comprises 168 firms in the pharmaceutical and chemical industry in 56 countries. With over 28,000 employees, it is the oldest pharmaceutical and chemical company in the world, renowned for its traditional and progressive approach to science. In 2003, Merck revenues amounted to €5 billion, of which roughly €3.3 billion were derived from the pharmaceuticals business. Pharmaceutical operations include proprietary or patent-protected ethicals, generics and self-medication products.

MERCK KGAA

www.merck.de

INDUSTRY

Pharmaceuticals and chemicals

CHALLENGES

- > Optimise processes with intelligent documents
- > Implement a digital workflow
- > Increase the value of existing enterprise systems

SOLUTION

- > Electronic process management
- > Digital workflows Merck KGaA is leveraging the Adobe Intelligent Document Platform for a flexible eForms system connected to its clinical trial management and existing database systems.

RESULTS

- > Intelligent documents helped reduce forms processing time from five minutes to one minute
 - > Digital workflow helps ensure reliable document delivery, shortening time for processes by several days
 - > Tracking tables optimises project control
-

Challenges

Developing a new drug is a tedious and cost-intensive process

Before a product can be brought to market, its ingredients have to be scrutinised in a clinical trial. For this purpose, clinical researchers perform a series of tests on up to 10,000 patients over several years. Government regulations require that these clinical tests are documented in written, comprehensible and auditable format. Allocating drugs to clinical investigators is particularly time-consuming and involves many forms.

Therefore, Merck needed a system that accelerates the process using digital forms, enables the transfer of data from existing systems and helps reduce costs and errors. A medication request submitted to Merck by an outside clinical investigator can trigger up to four processes in addition to the actual order. These processes include the release, the shipping notice, the delivery and the confirmation of receipt.

All forms have to be submitted and signed, and the data from the forms has to be transferred reliably into a tracking table. Naturally, this workflow should include not only European but also Asian and American employees. Many of these processes are time-critical and require automatic email notification. "We needed a digital, intranet-based, workflow to coordinate and accelerate inter-departmental forms submission," explains Ines Höhne, International Clinical IT Coordinator at Merck. Clinical trials are executed using various software systems, including a back-end trial management system connected to an Oracle database.

Forms and workflows have to be able to transfer information to the system and process extracted data. Because the trial management system is deployed on a global scale, it has to be operated using a Web browser to ensure direct intranet access to forms for Merck employees and VPN access for external partners.

Solution

As early as 1998, Merck started implementing digital, HTML – based forms

Unfortunately, the company did not initially have a comprehensive document platform. Adobe server software provided all the solutions required to create and manage flexible form layouts and intelligent documents. The Adobe solutions also provided for flexible workflows and, above all, integration with back office systems and the intranet. In collaboration with Adobe's partner company, neeb & partner GmbH, Merck extended this platform using eForms to build its 'Merkur' system and connected it to its trial management system and existing databases.

Merck has created more than 100 intelligent forms over the last four years which are accessed by 300 authorised internal and external users worldwide via the Merck intranet. The XML-based Adobe architecture enables the transparent integration of existing applications and documents and paves the way for the connection to SAP systems as well as the EMC Documentum platform.

“Using Adobe Designer, we can develop forms, integrate plausibility checks, or connect to a database quickly,” says Alexander Tryba, managing partner at neeb & partner GmbH. The major challenge of global projects is usually the workflow organisation. “With Adobe’s workflow solutions, process design can easily be visualised and realised as a series of activities in a flowchart on a graphical interface.”

Results

More efficient studies due to more efficient processes

Working with digital documents enables Merck to deploy standardised processes and achieve considerable cost savings, although the improvement of the internal processes is of even greater significance. Merck succeeded in reducing the amount of time required for form processing from five minutes to one minute by connecting the forms to its databases. Input errors are as good as non-existent thanks to the integrated plausibility checks. Even changes to the mandates set by the U.S. Food and Drug Administration (FDA) can easily be transmitted to the Merkur system in less than a day.

The ability to control the project status in tracking tables is one of Merck’s major requirements. Using the Adobe interface, data can easily be exported into the corresponding Microsoft® Excel structure for further processing. As a result, even external employees without direct access to the system can use the data.

The Merkur system has become indispensable. As Ines Höhne concludes, “By consistently deploying the Adobe Intelligent Document Platform, we have managed to implement a forms solution for the pharmaceutical business sector that enables us to conduct clinical trials far more efficiently than before.”

IN PARTNERSHIP WITH

neeb & partner GmbH, a software and consulting firm specialising in Enterprise Content Management (ECM) and Archival www.np-gmbh.com

Merck clinical trial forms and documents are accessed by 300 internal and external users worldwide via the company intranet. The XML-based Adobe architecture enables the transparent integration of existing applications and documents and paves the way for the connection to SAP systems as well as the EMC Documentum platform.

“By deploying the Adobe Intelligent Document Platform, we can conduct clinical trials far more efficiently than before.”

*Ines Höhne,
International Clinical IT Coordinator,
Merck KGaA*

SYSTEMS AT A GLANCE

- > Adobe Form Designer
 - > Adobe Form Client
 - > Adobe Workflow Server
 - > Adobe Workflow Designer
 - > Oracle Database
 - > EMC Documentum
-



INPS, Italian National Social Security Institute

The INPS improves its forms management system thanks to Adobe technology

Organisation Overview

The INPS, the National Social Security Institute, is the main social security organisation in Italy and issues pensions to 16.5 million people annually. The Institute also provides other services, such as unemployment benefits and many types of aid administered by the Ministry of Welfare, making the total number of constituents being served 35 million.

Some INPS constituents, such as employment consultants, companies and associations in the sector, are able to take advantage of advanced technology, but more often constituents are pensioners and people who are generally unfamiliar with new Web technologies and the Internet.

INPS, NATIONAL SOCIAL SECURITY INSTITUTE

- > Headquarters: Rome, Italy
- > Size: 30,000 employees across 220 offices throughout Italy
- www.inps.it

INDUSTRY

Government

SOLUTION

Online Forms Management

PRODUCTS USED

- > Adobe Acrobat
 - > Adobe Acrobat Capture®
 - > Adobe Document Server
 - > Adobe Document Server for Reader Extensions
 - > Adobe Reader
-

Challenges Faced

Make INPS services available online

In line with the strategic directives of the Ministry of Innovation and Technology, the Institute is pursuing a policy of reducing paperwork by means of broadening its electronic channels. To improve production processes as well as its interactions with constituents, the INPS decided to offer distribution, completion and submission of institutional forms via the Internet.

Streamline interaction with constituents

Within the framework of its e-government program, the INPS chose Adobe Portable Document Format (PDF) technology because it conforms to standards already issued by the Authority for Computing in Public Administration, which establishes standards, rules, plans and criteria for the promotion of computing in public offices. Adobe PDF technology also ensures that forms can be amended immediately and data entry costs eliminated completely. The INPS has created a database of institutional forms containing approximately 240 updated forms available in Adobe PDF. Next, with the aim of constantly improving service and convenience, as well as reducing the need for in-person communications, the INPS chose to further develop its Internet and call centre channels. To this end, it decided to allow constituents to fill out, save and submit forms in Adobe PDF via the Internet.

Success Strategy

The Institute was looking for a solution that would make fewer demands on constituents and enable people with less technology experience to use the system. To achieve this goal, the INPS used various Adobe products: Adobe Acrobat for creating new Adobe PDF forms and Acrobat Capture for optimal conversion of paper forms to Adobe PDF using innovative data compression algorithms. The most innovative aspect of the solution was using Adobe Document Server for Reader Extensions to give Adobe PDF documents and forms capabilities for constituents to complete them online or offline using Adobe Reader software, which is available free of charge and therefore accessible to millions of constituents.

Each month approximately 700,000 people access 240 Adobe PDF forms, made available online by the INPS. In this way, the INPS has increased opportunities for contact with constituents and reduced the costs associated with the creation, distribution and collection of forms. The INPS then uses Adobe Document Server to process the completed forms.

“The ease of using these tools, the extremely high presence of Adobe developers (that can be easily found in the Web community), their widespread acceptance in the marketplace and the option of using a first-rate consultancy service in the realisation of our project has led us to adopt Adobe technology; to which we owe the excellent results,” says Giulio Baldamura, Area Manager of the Central Directorate for Information and Telecommunications Systems at the INPS.

Business Benefits

- > Provides easily accessible, always up-to-date forms
- > Reduces the need for in-person communications
- > Lowers the printing costs associated with paper forms
- > Improves quality of service

With Adobe technology and solutions, the INPS has quickly succeeded in achieving its goals in accordance with financial criteria and guaranteeing the public shorter response times. The INPS no longer requires constituents to conduct business at the counter. It now offers them access, 24 hours a day, 7 days a week, to updated forms, which can be completed and submitted electronically over the Internet anytime, anywhere.

In addition, amending forms has become a simple and quick operation that has allowed the Institute to save the considerable sums that were once necessary to cover the data entry and printing costs of those same forms.

The INPS has succeeded in improving the quality of the service it provides by using multi-channel communications, making interaction with the Institute easier, faster and more efficient.

“Using Adobe technology has allowed a rapid return on investment, thanks to savings on the data entry and printing costs of forms. It has also allowed us to develop methods of interaction with our constituents that have considerably improved relations between the Institute and the public. This is the end result of a successful e-government project,” says Dionigi Spadaccia, Central Director for Integration of New Technology in user communication systems at the INPS. “Adobe technology gives all organisations that wish to improve their service in terms of efficiency and effectiveness, the perfect opportunity.”

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*Dionigi Spadaccia,
Central Director for Integration
of New Technology in User
Communication Systems, INPS*



The Contractor's Portal – Portal del Instalador

Digitally processing more than 80,000 low-voltage electricity certificates annually with the Adobe Intelligent Document Platform

The Contractor's Portal in Spain is a project of four electrical, heating, plumbing and gas industry associations: Confederación Nacional de Instaladores de Fontanería (CONAIF); la Federación Catalana de Instaladores de Electricidad, Fontanería y Cale-facción (FERCA); de los Grupos Energéticos Gas Natural; and Repsol YPF. The portal offers a wide variety of services and information to employees and companies in the industry as well as access to legislation, course information and product databases.

Currently more than 10,000 contractors and workers from Cataluña have been able to digitally file Electricity Certificates in accordance with the Low Voltage Electricity Technical Regulation. For all new electrical installations or upgrades in residences or businesses, electrical contractors must submit the complex, multi-page Electricity Certificate forms to an Independent Inspection Control Entity (EIC) designated by the regional government. In this case, the regional government agency is the Generalitat de Catalunya.

The Electricity Certificates are used as the basis for producing approved Technical Design Memoranda (TDMs) that include a series of plans and schematics, such as single-wiring diagrams, home location and inside-wiring diagrams. In addition to being managed by a designated EIC, the completed TDMs must be readily available to government agency reviewers at any time.

THE CONTRACTOR'S PORTAL – PORTAL DEL INSTALADOR

www.portaldelinstalador.com

INDUSTRY

Energy

CHALLENGES

- > Reduce time needed to submit complex permit certificates
- > Improve accuracy of information submitted by installation contractors
- > Speed certificate review and approval
- > Streamline government access to submitted permit applications

SOLUTION

- > Process management
- > Document collaboration
- > Document control and security

The Contractor's Portal adopted the Adobe Intelligent Document Platform to improve completing, submitting and processing permit certificates for electrical installations.

Digital certification and remittance of Electricity Certificates

To be considered legal, all new electrical work must have a TDM. Unfortunately, the processing of submitting the forms needed for TDMs can be complex, sometimes requiring electrical contractors to hire consulting companies to handle the task. Until now, contractors or their hired consultants filled in forms on paper and remitted them in person to the appropriate EIC for approval. If necessary, site inspections were scheduled.

“When the new regulation went into effect, FERCA asked us to study the possibility of making certification more flexible via electronic processing through our portal,” says Santiago De la Fuente, Executive Director of Portal del Instalador. “After analysing our information processing needs, we selected Adobe Reader Extensions Server software.” Grupo Seidor, an Adobe Solutions Distribution Partner, worked with Portal del Instalador to carry out the task.

As a result, contractors can now use free Adobe Reader software to fill out certificate forms in Adobe Portable Document Format (PDF) that are available on the organisation's portal. The documents in Adobe PDF look just like they do on paper, as is required by law.

Automatic certificate validation system

Although the form looks like a simple Adobe PDF document, a powerful calculation tool runs in the background and analyses parameters and intervals based on data that the contractor entered. The contractor can easily download the document from the portal and fill it out online or offline. Built-in intelligence in the Adobe PDF file runs calculations, makes relevant checks and notifies users of possible omissions or mistakes.

According to Project Manager Jordi Finestras of Grupo Seidor, “The form automatically determines approximately 20 of the main parameters for electrical installations, based on 30 internal tables. Both the TDM and the single-line diagram – a schematic of the installation – are generated automatically”.

“We calculated that the automated validation system will significantly reduce errors from processing certificate forms on paper,” says De la Fuente. “The system is so helpful for electrical, plumbing and heating contractors that FERCA will use it to train its members on how to fill out certificates.”

Once data is entered, an XML file is exported for automatic integration with various EIC systems that make the certificates available to the government agency for approval. The application workflow is defined and executed with the Adobe Workflow Server software. The contractor needs only Adobe Reader software, which is free and requires no training.

Another objective in the online certificate process was to limit intrusion and contractor ID counterfeiting. Previously, when paperwork on a contractor’s new project arrived at an EIC, it had to be reviewed manually to see that the contractor’s license was current. Now, when the contractor fills in personal data, the program checks it automatically against the FERCA database, preventing unauthorised contractors from using the system.

Streamlining approval processes for 80,000 certificates annually

Project managers were highly concerned about the high volume of certificates – averaging 80,000 a year – that needed approval. This issue was solved with Adobe technology, according to De la Fuente.

When an EIC previously received paper certificate forms for a new project, the first task was to check that all required documentation had been submitted. With the Adobe Intelligent Document Platform, the certificate forms are sent electronically and the system automatically verifies that the necessary details have been provided.

The result is a reduction in the work required by an EIC and by the installation contractor. For instance, a contractor previously needed an average of three hours to fill out a certificate. Today, the process takes only 10 to 15 minutes.

“Digital certification saves time, increases effectiveness and significantly reduces errors that are produced in a paper-based process. Furthermore, with Adobe technology, we can incorporate digital signatures into the project,” say De la Fuente.

Electronically signing documents

“Another important issue that we were dealing with when we selected the Adobe solution was electronic signatures,” says De la Fuente. “Some areas are already asking for them. We are sure that eventually when a contractor tries to upload his paperwork, he will first have to identify himself with an electronic signature. Adobe software supports this process.”

The Adobe solution handles electronic signatures natively and can also place time stamps on materials. As for the future, Santiago De la Fuente says: “We are presently working on extending the system to other regions in Spain. Furthermore, there are many other installations that require certificates, such as gas, water, elevators, pressure devices and heating and cooling.”

RESULTS

- > Reduced contractor time to fill out certificates from three hours to 15 minutes
- > Decreased errors on forms by automating calculations and data verification
- > Accelerated agency review of certificate forms
- > Improved control and monitoring of certificates with built-in validation and digital signatures

IN PARTNERSHIP WITH GRUPO SEIDOR

A firm specialising in integrated IT solutions
www.seidor.es

SYSTEMS AT A GLANCE

- > Adobe Reader Extensions Server
 - > Adobe Workflow Server
 - > Adobe Workflow Designer
-

“Digital certification saves time, increases effectiveness and significantly reduces errors that are produced in a paper-based process. Furthermore, with Adobe technology, we can incorporate digital signatures into the project.”

*Santiago De la Fuente,
Executive director,
Portal del Instalador S.A.*



Medway Council

Local government authority speeds forms processing and brings key services online using the Adobe Intelligent Document Platform

Organisation Profile

Medway Council is a unitary authority providing local government services for a quarter of a million people in Medway. Medway is recognised by the United Kingdom government as part of the developing Thames Gateway region, which will play an increasing role on the European and global stage. The council supports a wide range of services, including economic development, education, social care, roads, housing, planning, customer complaints and refuse collection. To better respond to residents' needs and ensure compliance with the U.K. Online initiative, Medway Council adopted the Adobe Intelligent Document Platform to provide the public with convenient, reliable access to government materials that can be reviewed, completed online or offline, and submitted electronically.

MEDWAY COUNCIL

- > Local government authority providing services to more than 250,000 people in the Medway region
- > Size: 9,000 employees
- > Headquarters: Rochester, Kent, United Kingdom
- www.medway.gov.uk

INDUSTRY

Local Government

SOLUTION

Online Forms Processing

PRODUCTS USED

- > Adobe Form Designer
- > Adobe Form Server
- > Adobe Web Output Pak
- > Adobe Workflow Designer
- > Adobe Workflow Server

Challenges Faced

- > Comply with U.K. Online initiative by 2005 deadline
- > Ensure citizens adopt the e-government services
- > Improve customer service
- > Simplify form completion and processing

Medway Council has to comply with the national government initiative, U.K. Online, which calls for making all services available to the public electronically by 2005. This challenge was particularly tough for the council because many of its users would be using public access terminals, meaning security issues also needed to be taken into account.

Medway Council needed not only to meet the deadline for e-government services, it also had to ensure the public's use of the services – otherwise the exercise would have no value. This meant that the council had to closely examine which forms and processes would benefit users most from a new way of working. In the past, the perception among people was that councils were not being as responsive as possible to their needs. This perception stemmed largely from difficulties in tracking complaints and requests, so customers never felt fully confident that actions were being taken.

As with many government organisations, almost every process is driven by the completion of forms. Originally, this was almost entirely paper-based, which was both bureaucratic and time-intensive. Some of the forms, such as the one used by the adoption and fostering division, necessarily ran to over 15 pages in length, serving as a barrier for users. One of the best ways to ensure citizens use the service was to focus on making these forms more manageable as an incentive to drive users online to complete them.

“Every time Medway Council is contacted by a member of the public, a form is filled out, either by themselves or by us. The more we can automate this process, the more efficiently we can function.”

*Richard Lynn,
IT Project Manager,
Medway Council*

“Every time Medway Council is contacted by a member of the public, a form is filled out, either by themselves or by us. The more we can automate this process, the more efficiently we can function,” says Richard Lynn, IT Project Manager, Medway Council.

Success Strategy

Medway Council selected Adobe Systems to help it address these challenges. Its approach was to tackle the project one form at a time, beginning with one of the simplest – the customer complaint form. Despite not supporting the conversion to an online form with advertising to drive usage, within the first three months the council had received more than 250 forms and was receiving 11 forms per day from the public.

Having completed the first stage, the next step was to make the most of the capabilities offered by the technology. One of the first forms to be moved online was the adoption and fostering application form. The new form featured built-in intelligence that shortened the overall form length according to the candidate's answers, made the application form quicker and simpler to complete.

Users can now join a library, apply for council tax discounts, report racist or homophobic abuse, register for waste collection, order a memorial, become a sports coach, apply to be a foster parent, or report potholes, vandalism, illegal dumping, graffiti, broken street lights and road defects – online. Medway Council identified these services for migration early on in the project because they were expected to be highly sought after and contribute strongly to the overall success of the initiative.

Customers will also be able to track the progress of any requests or complaints submitted to the council via the council's Web site, allowing users to know that responsive actions are being taken. In the future, Medway Council is looking to incorporate digital signatures, which will enable the remaining 10% of its forms to be moved online.

Results

The Web-based forms processes deliver benefits to both the public and Medway Council, which is well on its way to complying with the 2005 deadline for the U.K. Online initiative. The public has faster and easier access to materials for requesting government services. At the same time, the streamlined, digital processes make it easier for Medway Council to track requests and follow up with individuals as needed.

For the council, the automated system is on track to achieve a considerable return on investment, due to savings in administrative costs and the cost associated with the copying and delivery of paper. The Web-based processes provide the added benefit of helping to ensure that constituents access only current versions of forms, minimising the need to ask citizens to resubmit materials and giving council staff the information needed to efficiently process requests.

The flexibility of the system has been excellent, allowing the council to add services to meet changing citizen demands. "With Adobe, we are continually impressed. There aren't many limitations to the capabilities of the Adobe Intelligent Document Platform," concluded Lynn.

RESULTS

- > Enhanced customer services
 - > Reduced time needed to complete and process forms
 - > Lowered council administrative costs with automated processes
 - > Improved tracking of residents' requests
-

“User-friendliness has proved to be the key to ensuring the public use the services, and this was something we could not have achieved without the technology from Adobe.”

*Richard Lynn,
IT Project Manager,
Medway Council*



Ålandsbanken

Successful Nordic bank handles more business and enhances customer satisfaction with the Adobe Intelligent Document Platform

Company Profile

Founded in Mariehamn, Åland in 1919, Ålandsbanken ABP is a successful commercial bank. Branch establishments in Helsinki, Esbo, Tammerfors, Åbo, Pargas and Vasa have strengthened Ålandsbanken's position as a reliable and innovative financial player in Finland. Ålandsbanken Fondbolag AB and Asset Management AB are part of the group.

ÅLANDSBANKEN

- > Full service bank with a total of 28 branches on Åland, and in Helsinki, Esbo, Tammerfors, Åbo, Pargas and Vasa as well as a broad offering of Internet banking services
- > Revenue: Operating profit 14.2 million Euro, 2002
- > Size: Approximately 380 employees
www.alandsbanken.fi

INDUSTRY

Financial Services

SOLUTION

- > Compliant Document Generation
- > Customer Self Service
- > Extending eBanking

PRODUCTS USED

- > Adobe Central Pro Output Server
 - > Adobe Form Designer
 - > Adobe Form Server
 - > Adobe Output Designer
-

“When the pilot study was finished, we began making an inventory of suppliers who could satisfy our list of requirements. We chose Adobe.”

*May-Britt Törnberg,
Project Manager,
Ålandsbanken*

Challenges Faced

- > Manage a rapidly increasing document flow
- > Streamline management of forms for Internet Banking

New demands from the Finnish Financial Supervisory Authority in the 1990s increased the number of administrative documents needed for banking, including agreement forms, agreement terms and documents outlining customer services. Ålandsbanken's decision to open an office in Finland would double the number of forms and customer documents previously handled by the bank.

The launching of Ålandsbanken's Internet Bank meant reformatting forms traditionally used on paper in branch offices for Web presentation. This meant that forms had to be updated in several different subsystems.

Success Strategy

Ålandsbanken conducted a pilot program to evaluate the challenges and develop a list of requirements for a technology solution, including:

- > Produce each type of form in a single template that can automatically generate customised e-forms for different situations, such as data output from centralised mainframe-based systems, use in Internet banking and other activities
- > Permit Internet banking customers to search online for current agreements
- > Enable office staff handling customer requests to immediately search and present a customer's current agreements

“When the pilot study was finished, we began making an inventory of suppliers who could satisfy our list of requirements. We chose Adobe,” says Ålandsbanken's Project Manager May-Britt Törnberg. Ålandsbanken is now deploying the Adobe Intelligent Document Platform in stages. “We want to give everyone time for the changes, so they can feel secure with the new methods.”

Results

Ålandsbanken believes that closeness to the customer and warm, personal service strengthen competitiveness and increase business volume. The new document management solution gives front-line employees better resources for meeting with customers and taking care of their needs. It also contributes to customers seeing Ålandsbanken as being fast and flexible.

The new electronic forms processes have minimised the costs to print, distribute, store and update materials. In addition, template-based production of e-forms creates a major cost-saving potential because less maintenance is required in the different subsystems.

Whether customers choose self-service via Internet banking or direct contact with branch personnel, the offering of financial services is broader and banking is more effective. This creates satisfied customers who stay with the bank and use new services.

RESULTS

- > Reduced administration and system management costs
 - > Decreased rental costs associated with document storage
 - > Improved customer satisfaction and loyalty
-

“At Ålandsbanken, we always try to think in innovative ways. Document management solutions from Adobe and Frontec are excellent tools in our business strategy.”

*May-Britt Törnberg,
Project Manager,
Ålandsbanken*



Belgian Ministry of Finance

PDF form offers great advantages – produces electronic tax declaration for the citizen

The Belgian Ministry of Finance is now computerising tax declarations more decisively through the use of PDF forms. The Ministry wants to remain flexible and has for the time being found a hybrid form for the tax declaration. In the meantime, there are some 300 forms available in PDF format. Jozef Kortleven, Advisor-General at the Ministry of Finance in Belgium, talks about political decisions and the advantages of PDF.

Josef Kortleven: “Governments in every country have set themselves the task of creating e-government to offer better services to businesses and people in general. A country like Canada is going full ahead in this, while other countries like Belgium are following in their footsteps, but have indeed been working very hard to catch up. However, putting e-government into practice is no easy task. There are two sides to the question: computerising the front office – so, ensuring that citizens can send in their forms electronically one way or another – and creating the back office, where the data filled in on the forms can be processed. Sometimes people accuse governments of having a very nice front office, but that their back office leaves much to be desired. In this respect we just have to be pragmatic, certainly in Belgium, because here we are confronted structurally with a lack of staff and ICT resources.”

“We have applied ourselves to establishing a good front and back office with a couple of major applications for tax categories that will be used *en masse*. These are Tax on Web – an online application for entering personal tax returns – and two applications called Edivat and Intervat for online VAT declarations (the former is for accountants and the latter for private individuals). Finally, there is Finprof, an application that serves for declarations of tax-at-source on business income.”

Downloading forms

“But e-government can’t stop there: we also have to computerise less important forms. The problem is that solutions like Tax on Web are not cheap. We had to find something with minimal costs. We wanted to set up a good front office: not just filling in forms, but sending them out electronically as well. We looked for a sort of hybrid formula. Forms are put on the Internet, which users can then fill in. Then they can print them out so they can sign them and send them in by ordinary mail. For the fanatics among the champions of e-government this solution probably fell short of expectations. Nevertheless, this method is a major step forward.”

“This is the project Finform-1. The form is in PDF, because this format is the easiest to transfer without the chance of errors. It is also the format that is closest in appearance to the paper tax declaration. We take the paper forms as they are and reproduce them as identical twins on the Internet, to ensure that they are perfectly recognisable for clients and civil servants alike. For a firm located somewhere on an industrial estate it saves an enormous amount of time when a number of non-standard forms, for example, can be plucked from the Internet without having to send someone out to an office that might be three, ten or more kilometres away and which might just by chance be closed, or where they’ve run out of those forms. Even that Finform-1, which can’t be sent in electronically, has great advantages for the taxpayer because of this. In addition, it has the advantage for us that it is very inexpensive, that it can be filled in offline and that it therefore costs nothing for the user in comparison with those other online applications.”

Reader Extensions

“Even though people can’t yet send in their forms electronically, the great advantage in the first phase of Finform is that people can find the forms on the Internet. For us the benefit is that PDF forms are much cheaper than the aforementioned applications of Tax on Web. Now we are entering the second phase of Finform, which will now make it possible to send forms in electronically; the user fills in the PDF form on his PC and sends it in electronically, so that we can process the data in the back office electronically, too. Another thing for us of course is that we need two versions of a form, one in French and one in Dutch and often in German as well.”

“Another great advance is that users can, with the aid of Reader Extensions, save the data they’ve entered in Adobe Reader, which is free of charge. Previously it was not possible to save them on the hard disk. It’s not very likely that the taxpayer has the full version of Acrobat at home.”

Privacy

“You have to consider carefully what the technical possibilities are for setting up a good front and back office. You sometimes hear enthusiastic stories about how governments in Canada, Sweden or Denmark are working. E-government is a genuine reality there, so people then say: “We’re lagging twenty years behind!” All tax declarations are done via the Internet there and you already get an assessment or a refund after three weeks. It looks like it’s an ICT problem in this respect, but that’s not the case. Here in Belgium it’s a matter of privacy. We can’t just request details from banks about taxpayer’s savings balances. It was once argued that we should be given information about donations by charitable organisations, which are deductible against tax, so that you could draw up a previously completed declaration. That didn’t go through because this would be an invasion of privacy. So the possibilities vary from country to country. In the Scandinavian countries people can look into people’s tax declarations by speaking at the town hall. The Belgian citizen is light years away from that situation here.”

Electronic back office

“We are now busily working on computerising all the information coming in from taxpayers. Of course, the best way to do this is to send in the tax electronically. We also scan a great deal of material and, as an experiment, there is the application of the bi-dimensional barcode, developed by Adobe, with which you can access the original completed form on the PC. The advantage of a barcode is that the completed details can be accessed at one go with a barcode reader, exactly as the taxpayer entered them. We would like to gain experience with the various methods of electronic processing.”

“The next logical step for Finform would be Finform II, whereby we make electronic dispatching and back office possible, at any rate for certain forms; perhaps corporate tax would be a candidate for this, but that’s something the management have to decide on. With other forms we won’t be going completely electronic yet. We’ll be attaching a barcode to these kinds of forms. For example, we have forms that are only valid for two months, for the refund of tax on stocks and shares: they can be found on Finform, printed out and filled in. That means that people don’t have to phone in and we don’t have to send the forms out. In short, we are flexible in this respect.”

Savings, thanks to the barcode

“If we ultimately make the tax declaration fully electronic, with a perfect front and back office, we will be able to make huge savings on costs. For the Finform Tax Declaration the saving on costs is not terribly clear. For the Finform Tax Declaration with barcode, however, the saving is obvious.”

“We must make sure that the front and back offices balance each other. If we have a smart-looking form for the person who has to fill it in, but the back office just can’t work with it, then you gain no benefit whatsoever from the automation and the costs remain about the same as they were before.”

“At the moment, it’s a long-term investment for us, because we are assuming that this automation will ultimately make real savings when it’s used on a large scale. This is probably why Holland has made the electronic tax declaration compulsory, because then you realise the whole cost-saving at once. So long as people have a choice over whether to do their tax returns on paper or electronically, there is a risk that you will still be stuck with high costs, unless at the same time we also make use of technologies that make possible electronic data extraction from paper declarations, such as scanning.”

“You have to understand the psychology of the taxpayers, the extent to which they find making electronic declarations logical or not. Perhaps people experience being forced to make electronic declarations as customer-unfriendly. So, in the transitional phase, we will perhaps be left with costs at the same or a slightly higher level. When will you make something compulsory, such as electronic VAT declarations? These are all psychological and political questions. It’s important to us to have the support of the accountancy agencies, too: if they are positive about it, then we’re happy too.”

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