

## USE CASE

# Accelerating Money Manager Report Generation Through Automation

## CHALLENGE

A large Financial Services company used 13 different systems to store and process reports on money manager products that all needed to be fed into a single report on a monthly basis for the business analysts and fund managers.

- This required a team of 10 people to provide input into a workflow that took approximately 20 days to complete
- Searchability of both the source data as well as the final report had to be 100% to satisfy compliance requirements
- Investment strategies need to utilize the most comprehensive and up to date data available

## RESULT

By using Advanced Rendering from Adlib they were able to replace a slow, expensive and manual process with a fast, efficient automated one.

- Time to create the report went from 20 days to 3
- An automated workflow has eliminated time consuming, error prone manual processes
- Adlib PDF's high fidelity output satisfies all compliance requirements
- The level of service the investment analysts are able to give to their clients has decreased customer turnover and increased satisfaction considerably

## INDUSTRY

Financial  
Services



## REPOSITORY

CUSTOMIZED

## WHAT IS ADVANCED RENDERING?

Helping organizations globally unlock the value in unstructured content, Adlib's Advanced Rendering technology takes the most commonly-used Enterprise Content Management (ECM) systems to a new level through content standardization.

By automating the conversion of content from multiple sources into more manageable and usable formats, Adlib enhances content throughout its lifecycle, facilitating advanced data extraction, classification, long-term digital preservation and more.

Adlib PDF Enterprise is the next-generation of Advanced Rendering technology that is ideal for environments with a high volume of unstructured content where accurate, scalable and highly-available data is required across the enterprise.