A FINANCIAL SERVICES ORGANIZATION DELIVERS ACCESSIBLE PDFS

Post Composition Document Accessibility from a CMOD Repository

AccessibilityNow

BACKGROUND

This large U.S. based financial services company provides a wide range of financial products and services for businesses and consumers, including credit cards, personal and commercial banking, and lending and investment services. In order to avoid fines and be in compliance with regulations such as the ADA and the Section 508 ICT refresh they needed to deliver documents in Accessible PDF format to their blind, partially sighted and cognitively disabled customers.

The Challenge

The company stored content in an IBM Content Manager OnDemand Repository (CMOD) in AFP format. Although their composition tool supported conversion to Accessible PDF, this approach would have required that all communications be converted during composition and stored as Accessible PDFs – significantly increasing processing time, infrastructure overhead, and storage requirements. In addition, this solution would have only worked with documents moving forward, since previously archived data would not be affected.

In order to improve efficiency and reduce storage requirements and related costs, the account wanted to explore the feasibility of creating Accessible PDFs (WCAG 2.0) on the fly when requested by a customer by pulling the communication from the AFP data stored in CMOD, and creating and delivering an Accessible PDF while continuing to store the data in native AFP format. They didn't want to modify or disrupt their existing workflow or environment, which was working well for them and their customers.

One of their primary goals was to ensure a positive customer experience — an important consideration within a highly competitive market. With that in mind, they defined a performance threshold of no more than a few seconds per document to convert and deliver the Accessible PDF when a request is made.

At a Glance

CrawfordTech Products:

AccessibilityNow Transactional, PRO Transforms, CMOD integration

Objective:

- Convert AFP data in CMOD repository to Accessible PDF files upon request, post document composition

- Support high volume, with conversion and delivery to be performed within several seconds

- Continue storing documents in native AFP format

- Maintain current environment and workflow

Approach:

CrawfordTech's AccessibilityNow Transactional and print stream transformation were implemented and integrated with CMOD, distributed over multiple servers to ensure consistently high performance.

Results:

Customers who request an Accessible PDF file receive a properly formatted (WCAG 2.0) within seconds. The original data remains in AFP format within the CMOD repository, so the company anticipates saving millions of dollars over the next years due to reduced storage requirements.

CRAWFORD TECHNOLOGIES

The Solution

After a thorough review of the current environment, workflow and documents, CrawfordTech developed a proof of concept with sample data in order to validate the end-to-end process, assess performance, and evaluate the quality of the resulting Accessible PDF files. In order to meet performance requirements and to handle expected volume, including seasonal peaks, and to accommodate failover and redundancy, CrawfordTech recommended that the solution be distributed over 19 servers.

AccessibilityNow Transactional was deployed with CrawfordTech print stream transforms to automatically convert AFP to Accessible PDF upon request. The solution is integrated with the company's CMOD repository, resulting in an end-to-end workflow that builds on and extends the existing processes and environment that the company wanted to maintain.

With CrawfordTech accessibility solutions, setting accessibility tags, creating alt text, defining reading order, and determining other parameters for accessibility are performed on the underlying structure for each document type. By using this template-based approach, setup time is minimized, and even the most complex transactional documents can be properly tagged so that the communication can be easily navigated with assistive technology. Our MasterOne architecture, which sits under the hood of AccessibilityNow Transactional, supports multiple accessible output formats from a single setup, saving time and money. If this company wants to offer another format in the future, such as Accessible HTML, or a traditional alternate format like braille or large print, they would not have to re-tag the same documents.

Results

Customers who request an accessible file, whether it's from a previously archived record or for a new communication, now receive a properly formatted Accessible PDF (WCAG 2.0) within seconds. Because the underlying workflow has remained the same, implementation, training and internal user acceptance was fast and straightforward.

The company has calculated that they will save tens of millions of dollars over thirty years in reduced storage costs by creating Accessible PDFs post-composition upon request.

CrawfordTech Solutions

Crawford Technologies develops software and solutions to help enterprises optimize and improve the secure and accessible delivery, storage and presentment of their customer communications.

With over 1,800 customers on six continents, Crawfordtech solutions and know-how enable the largest banks, insurers, healthcare providers, utilities and print services companies to use their existing technologies, documents and data in new ways. We help them navigate the challenges in leveraging legacy applications in the platforms and applications of the future.

CrawfordTech's products, services and domain expertise reside at the nexus of content, data, and output management and are essential components of our customers' digital transformation, output management and document accessibility strategies.

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