

# Case Study: PricewaterhouseCoopers

INDUSTRY: FINANCIAL SERVICES

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## CASE STUDY OVERVIEW

PricewaterhouseCoopers (PwC) generates thousands of tax documents worldwide.

PwC tax preparers faced the challenge of creating and archiving high volumes of tax filings from their individual work stations.

Easily integrated into their existing custom tax preparation software, ActivePDF Server streamlines PwC's archiving, printing, and simplifies their complex file-naming registry.

Server provides PwC a server-based solution that automates, converts, archives, and locally prints all prepared tax filings at a low cost.

## PwC Implements ActivePDF Server to Generate and Archive Complex Tax Filings

PricewaterhouseCoopers (PwC) is one of the world's largest professional financial services network and the top accounting firm in North America. With offices in 158 countries and 743 locations worldwide, PwC provides assurance, tax, and advisory services tailored to a wide variety of industries, including government, financial services, and technology.

### Challenges

When tax season rolls around, PwC tax preparers use a custom application built from database information to generate necessary forms for each of their accounts. Since government regulations require PwC to maintain a copy of all prepared filings, each form is stored electronically in the company's internal document management system.

To ensure future accessibility and document integrity, the files are converted to PDF prior to archiving. Because the PwC team creates, on average, over 200,000 tax documents in the 4-8 weeks prior to the filing deadline, application performance is hindered due to the high bandwidth required to manage all these files.

PwC tax preparers create and archive PDF versions of filings direct from their work stations. However, expensive licensing costs and complex changes to the Microsoft® Word file-naming registry presented the need for a new solution.

The PwC development team sought a cost-effective, server-side PDF generator that would integrate into their existing custom tax preparation software application, enabling them to automate document conversion, eliminating tweaks to the file-naming registry.

### Solutions

After a brief search, the PwC team downloaded and evaluated Server by ActivePDF. The developers were immediately impressed by Server's high-volume processing capabilities and availability of support.

"Immediately upon downloading Server's free trial, the ActivePDF support staff was both helpful and reachable when any questions arose," says Patrick Shannon, Lead Developer at PwC. "That's not common in today's world."

Since Server provided all the necessary digital transformation features needed, and at the right price, Shannon and his team saw no reason to evaluate other offerings. Implementing Server's unique print-to-PDF functionality, the team quickly and easily implemented an automated PDF solution.

With Server in place, the new archiving process is completely transparent to the tax preparers, requiring no manual intervention to generate and store PDF versions of each prepared tax form.

The tax preparer completes an account filing using PwC's custom application, the data is then used to generate a series of printer files, which are automatically sent to the preparer's local printer to create the necessary documents – ready to mail to the IRS.

The printer files generated by the tax application are then sent to Server as a virtual printer on PwC's company server, generating a PDF version of the documents for submission to the company's internal document management system. The PDF files are now programmatically named using the corresponding account number, removing the need to alter the Windows® file-naming registry, then saved in the appropriate archive location.

Server is the easy-to-integrate print-to-PDF enterprise application for converting anything printable to PDF

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### Results

PricewaterhouseCoopers now uses Server to automatically convert and archive all prepared tax filings for their clients' trust accounts.

ActivePDF Server has alleviated the bottleneck previously encountered in archiving tax filings, enabling PwC employees to focus more on their clients, and less time creating documents. Additionally, the PwC development team is extremely satisfied with the simplified file-naming process.

"With ActivePDF Server installed on our production servers, we are able to programmatically name thousands of PDF files entirely within the application," explains Shannon. "As opposed to the Adobe® option, which required altering Windows registry values."

Concludes Shannon – "We have produced approximately 200,000 PDF files for extremely complex tax documents and have experienced absolutely no problems. ActivePDF Server has performed as advertised from the very beginning."

### Achieve Digital Transformation with Server & Other ActivePDF Solutions

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