

## From PDFs to Live Data: Monarch V8 Pro Puts Your PDF Reports to Work for You!

"I am overjoyed that you can use Monarch V8 Pro with PDF files...It's allowed me to automate a large amount of manual work...Thanks for a great product"

One of the greatest enhancements to Monarch in recent memory has been Monarch V8 Pro's ability to mine data from PDF files, which dramatically expands the reach of Monarch Pro beyond traditional text reports, spreadsheets and databases.

Increasingly, the PDF format is being used to present data. Enterprise information systems now use PDF more frequently as a reporting output format. Outside organizations, such as data processing firms, ASPs (Application Service Providers) and other third party service organizations often deliver data to business customers in the form of PDF files. However, the PDF format has traditionally been used to design and present reports and business documents in a "pretty" final format; PDFs are intended for the user to simply read it and print it, but that's about it!

Monarch V8 Pro brings the power of report mining to PDF files. Instead of printing or just viewing PDF reports, you can open them in Monarch V8 Pro. Monarch Pro then converts your PDF into properly aligned text for easy report mining, with no programming required!

We are pleased to share four recent success stories highlighting Monarch V8 Pro's PDF data mining capabilities. Regardless of your organization's industry or your particular business function, Monarch V8 Pro will put your PDF-based reports to work for you.

### **MONARCH V8 PRO TAMES HUGE PDF-BASED INVOICES**

Dion Ontiveros of First Interstate Bank, based in Montana, shares with us his success using Monarch V8 Pro with PDF-based invoices.

"I use Monarch V8 Pro to process PDF billing data from a major cell phone company into our accounts payable system," Dion says. "Our monthly cell phone bill is over 800 pages in length.

"I set up a Monarch Project, and with a click of the mouse, the project runs and mines the data from the PDF based bill. I then export the data to an Access table. It works quite well. I like the fact that I only had to convert the PDF bill to text once and my Monarch Project works well with each new PDF billing we have received."

"The use of PDFs [as a data source] has been an excellent addition to the Monarch functionality and usefulness in my department."

### **TURNING PDF INSURANCE CLAIM REPORTS INTO LIVE DATA**

Miami-based Cardif Services Inc., an insurer specializing in credit insurance products, uses Monarch V8 Pro to mine data from PDF-based insurance claim reports. "We use an ASP-hosted data processing system located on the west coast. Our ASP provides us with daily and monthly report files, transmitted to our servers. These reports are printed and stored as PDF documents," says Chris Alfaras, Manager of Information Technology and Development for Cardif Services.

"With the limitations of canned reports and to save costs in hired programming time, I was able to use Monarch V8 Pro to mine and filter data from our monthly profit control PDF reports with the specific data I need. I also use Monarch calculations to show insurance claims loss ratios and client profitability.

"Thanks to Monarch V8 Pro, I am now able to export data from our PDF reports to

**"Using Monarch to get data from the SEC's PDF files to cross-reference against our own databases is absolutely essential for compliance."**

database files, for complete flexibility to work with the data any way we wish."

"I am overjoyed that you can use Monarch V8 Pro with PDF files," Chris added.

"Monarch V8 Pro works excellently with PDF files. I am able to pull and capture any data I need. It's allowed me to automate a large amount of manual work for my employees. Thanks for a great product!"

#### **STOPPING A HEALTHCARE PAPER AVALANCHE**

"We upgraded to Monarch V8 Pro just in time," says Stephen Voss, Senior Systems Analyst for the Mental Health and Mental Retardation Authority (MHMRA) of Harris (Houston, TX) County, Texas. Prior to Monarch V8 Pro, MHMRA of Harris County was literally awash in paper, containing needed Medicaid payment data.

"We are a public, non-profit behavioral health provider," Stephen says. "We receive Remittance and Status (payment) reports from our Medicaid payer in PDF format. We used to print out these PDF files, which amounted to thousands of pages of paper.

"Using Monarch V8 Pro, I could use these PDF reports as a data source," Stephen explains. "I built a Monarch model and a project to extract the Claim Adjustment and Original Claim information, and export the data to Excel spreadsheets for analysis and further action by our Reimbursement staff.

"Monarch V8 Pro has already cut a 2,700 page report (an 8 MB PDF file) down to an Excel sheet with only 2,500 lines - of which only about 10% are of actual interest for follow-up.

"The flexibility of Monarch V8 Pro in working with PDF reports, plus the Monarch floating trap, data filters and project exports has saved us cases of paper and hours of time -- all in just one week!"

#### **BROKERAGE COMPLIANCE MADE EASY**

Dominion Securities Inc., the largest retail brokerage firm in Canada, has successfully utilized Monarch V8 Pro to help ensure compliance with the U.S. Securities and Exchange Commission (SEC).

"I was tasked recently with aiding our compliance department to report certain security holdings of the firm to the SEC," says Tim Paul, Business Systems Analyst for Dominion Securities. "This is a quarterly requirement. It entails making a report based on all securities in the firm with a market value of \$100 million or more that match the security list produced by the SEC.

"The list provided by the SEC is in PDF format. Specifically, this list is needed by brokerage houses to comply with SEC regulation 13F. I had no way to strip data from the PDF file. (To see this SEC list, visit: <http://www.sec.gov/divisions/investment/13flists.htm> - Ed.)

"I have been using Monarch for years with great success," Tim says. "When I found out Monarch V8 Pro supported PDF files, I immediately ordered the upgrade.

"Not only can I strip the SEC list from PDF, but I can point Monarch directly to the SEC site, without a separate download step. This was key in automating the process for quarterly production.

"Using Monarch to get data from the SEC's PDF files to cross-reference against our own databases is absolutely essential for compliance," Tim says. "Once the SEC posts their newest list to the website, using Monarch my turnaround time for reporting is now a matter of hours!"

Monarch V8 Pro puts data-rich PDF files to work for your organization, by enabling easy data mining from these PDF reports, making PDFs a new source of actionable data for everyone.

Don't print your PDF reports – make them work for you as a live data source with Monarch V8 Pro! Contact our Monarch sales team for pricing and how you can purchase Monarch V8 Pro risk free with our 30-day guarantee.



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