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|  | **AI Advancements** |

PDF to Word Table Converter

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| **PROJECT TITLE** | PDF to Word Table Converter |
| **COMPANY NAME** | Not specified |
| **CLIENT** | Jono Ross |
| **PROJECT MANAGER** | Sean Oldenburger |
| **AUTHOR** | Samuel Cunningham |
| **START DATE** | Not specified |
| **END DATE** | Not specified |
| **PROJECT DESCRIPTION** | Develop a solution to convert insurance PDF quotes into a formatted Word table for easier data extraction. |

Client Approval and Sign-Off

Name:  
Date:  
Signature:

Contractor Approval and Sign-Off

Name:  
Date:  
Signature:

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Change Logs

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| --- | --- | --- | --- |
| **Revision** | **Change Description** | **Approval Date** | **Author** |
| 1.0 | Initial Draft |  | AI Agent |
|  |  |  |  |

1.0 Scope

This project is creating a solution to convert insurance PDF quotes into a formatted Word table for easier data extraction. The system will allow users to upload a PDF document, select specific pages for conversion, and output the content in a two-column table format. The project will utilize AI models hosted on Azure to enhance the accuracy of data extraction and ensure compliance with data protection standards.   
  
AI Advancement's role in the project includes developing the backend system to handle PDF processing and integrating AI capabilities for future iterations. The team will also manage hosting, maintenance, and ongoing improvements to the system, ensuring it meets the client's needs and can scale to other brokerages.

2.0 Contract Structure

Not specified

3.0 Key Deliverables

* User-friendly web interface for uploading PDF documents
* Functionality for users to select specific pages of the PDF for conversion
* Two-column table format output in a Word document
* Compliance measures ensuring no data storage and instant data erasure
* Ongoing maintenance and support for scaling the solution to other brokerages

4.0 Plan

Phase 1: Frontend Development  
- Create a user-friendly web interface for uploading PDF documents.  
- Implement functionality for users to select specific pages of the PDF for conversion.  
- Display the converted table on the website for easy review before downloading.  
- Provide options for users to set font, font size, and other formatting preferences.  
  
Phase 2: Backend Development  
- Develop the backend system to handle PDF uploads and processing.  
- Ensure the system can convert PDF content into a two-column table format in a Word document.  
- Implement compliance measures to ensure no data is stored and is erased instantly after processing.  
  
Phase 3: AI Integration  
- Assess if OCR technology is needed for scanned PDFs and integrate if necessary.  
- Build a system to extract specific fields from the PDF based on user requirements for future iterations.  
- Establish a feedback and iteration loop to improve accuracy and efficiency of data extraction.  
  
Phase 4: Hosting and Maintenance  
- Set up secure hosting for the application, ensuring compliance with data protection standards.  
- Manage ongoing maintenance and improvements to the system post-launch.  
- Provide support for scaling the solution to other brokerages, including a revenue-sharing model for additional sales.

5.0 Assumptions

* Client will provide access to various insurance PDF formats for testing and development.
* Client will ensure compliance requirements are clearly defined and communicated.
* Client will be available for scheduled meetings to provide feedback and examples.
* Client will supply any necessary documentation regarding their current processes and requirements.
* Client will assist in identifying specific fields needed for future iterations of the system.

6.0 Timeline

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| --- | --- | --- |
| **Milestone** | **Description** | **Estimated Time (Days)** |
| 1 | Frontend Development | 5 |
| 2 | Backend Development | 5 |
| 3 | AI Integration | 5 |
| 4 | Hosting and Maintenance | 3 |

Total Duration: 18

7.0 Budget

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| --- | --- | --- | --- |
| **Category** | **Time (Days)** | **Day Rate** | **Cost ($)** |
| Developer Effort | 18 | 1600 | 28800 |
|  |  | Total Cost | 28800 |
|  |  | + 10% GST | 31680.0 |

8.0 Delivery Team

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|  | Sam is an experienced AI Engineer and the Director of AI Advancements. He has led numerous AI projects including chatbots, document processing systems, and automated reporting tools. Sam specializes in large language models and conversational AI. |

Samuel Cunningham

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|  | Sean is an AI Engineer with expertise in machine learning and data science. He has developed multiple AI solutions including ECG analysis systems and automated document generation tools. |

Sean Oldenburger

9.0 Past Projects

No similar past projects were identified for the current requirements.