



Integrated Media Management

Trusted Financial Applications Get New Power with the Integration of the Adobe® PDF Library™ at Integrated Media Management

INTEGRATED MEDIA MANAGEMENT

- IMM creates output management and document automation technology for the financial services industry
- Headquarters: Linden, NJ
- On the web:
- www.immonline.com

INDUSTRY

- Financial Services

SOLUTION

- The Adobe PDF Library

IN PARTNERSHIP WITH:

- **Datalogics, Inc.**
- An Adobe® portfolio company and the key channel partner for the Adobe PDF Library
- Headquarters: Chicago, IL
www.datalogics.com

Company Profile

Integrated Media Management (IMM) creates systems that increase productivity, improve member services and reduce operating costs for the financial services industry. Their software eliminates the need to file, store and manually retrieve documents or physically scan and index completed documents and incorporates electronic signature capture. IMM works with host processors to achieve seamless integration. Over 500 financial companies are currently using one or more IMM software products.

TotaleAtlas

IMM has created a fully automated 'browser-based' document presentment solution for the financial services industry. TotaleAtlas allows users to create document sets on the fly with information filled in from a host database. The resulting document returns as an encrypted PDF, which includes a previously-stored digital signature, that is then approved by the user. The archive-able PDF can then be printed to any printer on the user's network, faxed through a fax server, or e-mailed.

TotaleReceipts

The second solution from IMM to utilize the Adobe PDF Library is TotaleReceipts. This solution automates the output of transaction receipts. After a transaction is posted, receipts can be printed on blank thermal or laser paper. Electronic signatures are applied, submitted and stored in a non-editable indexed PDF.

What the Adobe PDF Library did for TotaleAtlas and TotaleReceipts

By integrating the Adobe PDF Library into these applications, IMM updated turn-key solutions, adding the ability for full automation, beginning with the request and creation of an encrypted PDF and completing it with the delivery and storage of that PDF. These solutions draw security power from the Library's encryption capabilities, and allow flattening of the files for a streamlined workflow. With the integration of digital signatures through the Library, the solution is now complete.

How did the integration affect the sales-ability of the products? By utilizing the industry standard of a secure PDF, users of the solution found a reduction in paper and waste which has been cost and space effective. Financial institutions no longer need to store preprinted receipts, or deal with the costs associated with their printing, managing, and storing. This process also eliminates physically scanning documents, indexing documents and manually retrieving them, ensuring a fast and cost-efficient Adobe PDF workflow.



Adobe PDF Library File Flattening

In order to enhance and stream-line their automated esolutions, IMM used the Library to allow for flattening of the PDF files. As a user entered data into the selected forms for the composition of their specific document set, the PDF Library would make calls which merged the data and the form, resulting in a PDF which is no longer data and form, but is a single PDF or 'flattened.' This allows the solution to create secure documents that are ready for indexing and delivery.

Digital Signatures and the Adobe PDF Library

The Library allows for the creation and validation of digital signatures for use in PDF files. In order to have a smooth PDF workflow, IMM needed to be able to handle and control the digital signatures used in the two applications. The Library allowed IMM to set and create a personalized level of security for the digital signatures in their solutions.

Why the Adobe PDF Library

IMM had several reasons for selecting to use the Adobe PDF Library over third-party libraries. One of the first reasons was the name. Adobe is the inventor of PDF, and IMM felt that they wanted to provide their customers with true Adobe PDF. By using the true Adobe PDF Library, IMM's PDF output is guaranteed to be suitable for future versions of the Adobe Reader. The PDF will be optimally formed for fast downloads and small file sizes, and competing products have difficulties in font embedding/subsetting, compression, linearization, and cross-platform compatibility.

One of the important reasons the Adobe PDF Library was chosen is that it allowed IMM full control over every aspect of how the PDF was created within their applications. Using the myriad of calls in the software development kit, IMM was able to set the levels of security. It allowed IMM to designate how the files were flattened, how the fonts were embedded, and what type of encryption was used. Being able to oversee each aspect of the PDF creation and how the PDF documents were handled in the automation portion of the solutions, allowed IMM to enhance their offerings. Not only so the applications could deliver PDF, but also so that the solutions themselves were destined to set the standards in how the financial industry solutions handled and delivered customer information.

Datalogics Support

The Datalogics Support Team includes some of the most experienced Library users in the world. IMM received first hand experience for a two-day consultation session. In this session, the solutions IMM wanted to integrate PDF into were reviewed and necessary coding was explained and tested. After the two days were over, the programmers from IMM left Chicago ready to code.

With little need for additional support from Datalogics, IMM completed the work required to integrate the PDF Library into their applications. IMM's success and efficiency is a direct result of the strong partnership which included IMM's expert Development Team and the Support Team at Datalogics. The experience and help Datalogics provided ensured that the integration of the PDF Library would bring their solutions to market faster, bringing IMM a faster return on their investment.

IMM SOLUTION OBJECTIVES:

1. Set and create a personalized level of security for digital signatures.
2. PDF output that is guaranteed to be suitable for future versions of the Adobe® Reader®.

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