

## University of IMM

IMM LiquidOffice Form Designer (LO) Document Preparation Training Class

"A huge help for financial institutions planning, deploying or live on eSign/Document Exchange"

Dear Valued Customer,

Enclosed is the registration packet and agenda for the next IMM LiquidOffice Form Designer Document Preparation Training Class which will be held **October 9-10, 2019. Class size is limited to 20 attendees and will be filled on a "first come, first serve" basis.**

The class is two full days. The first day will include training on creating documents in LiquidOffice Form Designer with attendees designing and fielding documents including best practices for customizing and building form design concepts.

Day two includes how to set up dynamic intuitive document selection, signature fielding for in-branch and remote signatures, adding objects in the Java Code Generator, importing pre-existing PDFs, a demonstration of document conversion and the LO Lab showing attendees how to utilize the Expression Builder/JavaScripting. Attendees will receive a thumb drive with expressions and JavaScripting examples of practical applications that existing financial institutions have used to streamline document processing. The entire training class is hands-on and features a technical and operational review of "How To" which is a necessity for credit union personnel that plan on creating or maintaining documents for eSign and/or Document Exchange.

The cost of \$1,400 covers the seminar course materials, a training workstation, breakfast and lunch on Wednesday and Thursday. Meal vouchers will be provided upon hotel check-in for breakfast. Please review the following information and let us know if you have any questions.

Sincerely,

IMM Training Staff

[AdminOps@immonline.com](mailto:AdminOps@immonline.com)

800-836-4750 ext.531

## What do IMM Training Class Attendees say about the class?

"I took this class because (our credit union) is currently changing to a new application system, and we will be fielding and maintaining our own documents. IMM's class was very helpful. I learned how to create, field and convert documents. The class was easy to follow and I have already started using what I learned in class and feel it will be very helpful in the future."

**Lynette Carden**

**Fresno County Federal Credit Union**

**University of IMM Attendee**

"I thoroughly enjoyed the class. The IMM instructors did an excellent job. LiquidOffice Form Designer is the best forms editor I have seen. It is simple to use, and feature rich. Designing new forms is quick and painless, plus the forms process of installing and administering in eSign is also very simple. In my opinion, anyone who is proficient at using Word or Excel will be able to create and deploy new forms."

**Mark K. Mueller**

**San Mateo Credit Union**

**University of IMM Attendee**



## Day 1: Class Agenda

Wednesday 10/09/19

All attendees will be supplied with and trained on a fully loaded workstation (No need to bring laptops)

7:00am - 8:00am	Breakfast (Du-Par's Restaurant & Bakery) - We strongly recommend eating early to make the IMM Shuttle to class; it leaves at 8:15am sharp
8:00am	Bus Pick Up @ Suncoast East Entrance (Side Entrance near Salvatore's) This is the only pick up from the hotel
08:30am - 08:45am	Welcome Introduction
08:45am - 09:30am	<b>Presentation:</b> Overview eSign and Best Practices Versioning
09:30am - 09:45am	<b>Lesson 1:</b> Basics of LiquidOffice Form Designer
09:45am - 10:30am	<b>Lesson 2:</b> Design Membership Application
10:30am - 10:45am	<b>Break</b>
10:45am - 12:30pm	<b>Lesson 2:</b> Continues...
12:30pm - 01:15pm	<b>Exercise:</b> Loan Estimate Expression Builder
01:15pm - 02:15pm	Lunch (New Horizons Learning Center)
	<b>Lesson 3:</b> Working in LiquidOffice Form Designer (LO)
	Four Methods to create LiquidOffice Form
	Guidelines of IMM Conversion Tool
	Import PDFs into LO * Tabbing Order Exercise
02:15pm - 02:30pm	<b>Lesson 4:</b> Building Form Designer Concepts
02:30pm - 02:45pm	<b>Break</b> (Energy Drinks/Water)
02:45pm - 04:00pm	<b>Lesson 5:</b> The Guidelines of eSign Documents
	Adding Signature Field on eSign Document
	<b>Presentation:</b> Host Field Data Dictionary – Field Naming Convention
	<b>Exercise:</b> Host and Signature Field Mapping
04:00pm - 04:45pm	<b>Hands on Exercise:</b> Create a form from scratch
04:45pm - 05:10pm	<b>Demonstration:</b> eSign 2018 "Blended Signatures" Demo
05:15pm - 05:30pm	Day 1 Quiz
05:30pm	Transportation back to Suncoast Hotel East Entrance In-Route Recap Day 1 – Housekeeping – Questions

\*Note, the above agenda is preliminary and may change closer to the date.

## Day 2: Class Agenda

Thursday 10/10/19

7:00am – 8:00am	Breakfast (Du-Par's Restaurant & Bakery) – We strongly recommend eating early to make the IMM Shuttle to class; it leaves at 8:15am sharp
8:00am	Bus Pick Up @ Suncoast East Entrance (Side Entrance near Salvatore's) This is the only pick up from the hotel
08:30am – 08:45am	Overview of Day 2
08:45am – 09:30am	Recurring Options for Lending Documents <b>Lesson 5:</b> Continues... JSCoDeGenerator eSign Document Names Rules
09:30am – 10:45am	<b>Lesson 6:</b> Uploading and Processing Documents into eSign <b>Exercise:</b> Uploading and testing your document into eSign End User eSign Processing <b>Break</b>
10:45am – 11:00am	<b>Lesson 6:</b> Continues...
11:00am – 11:30am	Document Maintenance, Intuitive Document Selection & Criteria Indexing Values, DMS/Demonstration and Archival
11:30am – 12:30pm	<b>Lunch</b> (New Horizons Learning Center)
12:30pm – 01:15pm	<b>Demonstration:</b> Lights-Out Technology
01:15pm – 01:30pm	<b>Lesson 6:</b> Continues...
01:13pm – 02:00pm	eSign v2018 and How They Relate to Document Design eSign Documents Know-How
02:00pm – 03:00pm	<b>Lesson 7:</b> Java Script Lab Check In/Out – Descriptions.txt <b>Exercise:</b> How to Check In/Out? <b>Presentation:</b> Intuitive Document Set Integration <b>Break</b>
03:00pm – 03:15pm	<b>Lesson 7:</b> Continues...
03:15pm – 05:00pm	<b>Exercise:</b> How to write Criteria Understand JavaScript generated by JSCoDeGenerator <b>Exercise:</b> Smart eSign Forms with Custom JavaScript <b>Exercise:</b> How to add JavaScript for Data Aware Signature <b>Exercise:</b> Editing JavaScript for Smart eSign Forms
05:00pm – 05:15pm	Day 2 Quiz & Class Evaluation
05:15pm (approx.)	Transportation back to Suncoast Hotel @ East Entrance

\*Note, the above agenda is preliminary and may change closer to the date.

## LO Lab Overview

*This will NOT teach you how to write Acrobat® JavaScript code!*

The JavaScript lab will focus on how to use the LiquidOffice Form Designer Expression Builder and interpreting the base code generated by the IMM JavaScript Code Generator. We will also provide some examples of common Expression Builder examples and JavaScript functions that are not part of the base code and how to modify this code as it pertains to your documents. The lab will also be used as an open forum for any questions pertaining to the document conversion process. Listed below are examples of what will be covered in the "Lab".

## Dynamic Intuitive Document Selection

How to create "Criteria" that will dynamically add or remove documents from a document set based on a set of defined triggers.

- If there is a Guarantor on a loan, dynamically add the Guaranty Agreement
- If the loan is denied, then dynamically add the Adverse Action

## Expression Builder Examples

The LiquidOffice Form Designer Expression Builder is used to perform simple arithmetic or text calculations.

- How to Add/Subtract/Divide/Multiply fields
- How to concatenate City, State and Zip into one Entry field

## JavaScript Examples

IMM will provide a library of our "best hits" JavaScript examples which can be imported into documents designed by the Financial Institution. These are our design teams most requested custom java scripting code.

- Converting a numeric dollar amount into an alpha character amount
- Data-Aware signature fields
- Masking the TIN number on the form for printing purpose, but archiving an unmasked TIN number to an imaging system
- Enabling a checkbox appropriately based on the marital status

## Conversion Utility Overview (demonstration only)

The Conversion Utility overview will help credit unions determine whether or not they want to convert their own documents in-house, have IMM do a volume page conversion without clean-up and fielding, or have IMM do the initial form conversion with clean-up and fielding.

The conversion process will illustrate how to transform JetForm Design .IFDs, Microsoft Word .DOCs and Adobe .PDFs into LiquidOffice Form Designer.XFMs. The Conversion Utility can also be used to rename fields on an existing .XFM, a process called '.XFM to .XFM conversion'.

## Registration Information

To register for the class please either fill out the registration form electronically by clicking on the following link:  
[Class Registration Form](#)

Registration is \$1,400 per person. Classes are limited and will be filled on a first come, first serve basis.  
(Limited to 20 attendees - @ 2 people per credit union).

### Registration cut-off date is September 7, 2019

Cancellations received after the registration cut-off date will incur a 20% cancellation fee.

## Hotel Information

Suncoast Hotel & Casino  
9090 Alta Drive  
Summerlin, NV 89145  
Phone: 866-636-7111

**\$64.00** Single or Double occupancy+ tax  
Hotel has a mandatory \$15.99 + tax per day Resort Fee  
[www.suncoastcasino.com/groups](http://www.suncoastcasino.com/groups)  
IMM Group Code: **AIMMO19** to obtain special room rate listed above

### Hotel Reservation Cut-Off: September 7, 2019

## Class Information

### Classes will be held at:

New Horizons Learning Center  
7674 W. Lake Mead Blvd. Suite #250  
Summerlin, NV 89128

Complimentary Shuttle Service from the Hotel to New Horizons will be provided. Please see class agenda.

### Dress Attire:

Casual

**Please Note: Classes will start promptly at 8:30 am both days.**

## Travel Information

### Airport Information:

McCarran International Airport services Las Vegas. Contact your local Travel Agent or Airline for ticket information.

### Ground Transportation:

The RTC Express bus may be used to visit the Las Vegas Strip. For RTC schedules, routes, and times, please visit their website at: [http://www.rtcnv.com/transit/route/westcliff/westcliff\(11-07-10\).pdf](http://www.rtcnv.com/transit/route/westcliff/westcliff(11-07-10).pdf)

### Contact Information:

Direct all inquiries regarding this training seminar to:

IMM  
2 City Hall Plaza  
Rahway, NJ 07065  
Telephone (908) 862-6600 ext. 182  
Email: [AdminOps@immonline.com](mailto:AdminOps@immonline.com)

## Additional Transportation Information

Vegas Western Cab-702-736-6121  
Desert Cab-702-688-6000  
ANLV Cab-702-643-1041 2 hrs in advance

## Software Information

To purchase the LiquidOffice Form Designer (LO) software please either fill out the order form electronically by clicking on the following link: [LiquidOffice Software Order Form](#)

The software is \$1,500 per license plus annual maintenance (\$300). A license is required for each workstation running LO. Javascript Code Generator (JSCG) (\$150/license) automates the process of generating JavaScript for global fields in eAtlas and eSign documents only. A license is required for each workstation running LO.