

## 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 14-15, 2020. 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 \$1,600 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 10/14/20

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 8:15 am sharp.
8:15am	IMM Shuttle Pick-Up for All Attendees @ Suncoast East Entrance (side entrance near Salvatore’s). This is the only pick up from the hotel.
8:30am – 8:45am	Welcome Introduction
8:45am – 9:30am	<b>Presentation</b> Overview of eSign and Best Practices
9:30am – 10:00am	<b>Review</b> Training Videos (Lessons 1 & 2)
10:00am – 10:30am	<b>Lesson 2</b> Methods Used to Create LiquidOffice Documents (XFM)
10:30am	Break
10:45am – 12:30pm	<b>Exercise</b> Build Your Own Document – Placing Fields and Other Objects <b>*All Attendees should bring 2-3 XFM or PDF documents to use for this exercise as well as “Build Your Own Document -- Field Mapping.” as listed below.*</b>
12:30pm	Lunch (New Horizons Learning Center)
1:15pm – 2:30pm	<b>Lesson 3</b> Working in LiquidOffice Form Designer <b>Lesson 4</b> Building Form Designer Concepts
2:30pm	Break (Energy Drinks/Water)
2:45pm – 4:00pm	<b>Lesson 5</b> Guidelines for Creating eSign Documents Adding Signature Fields to eSign Documents <b>Presentation</b> Host Field Data Dictionary – Field Naming Convention <b>Exercise</b> Host and Signature Field Mapping
4:00pm – 4:45pm	<b>Exercise</b> Build Your Own Document -- Field Mapping
4:45pm – 5:10pm	<b>Demonstration</b> eSign 2018 “Blended Signatures” Demo
5:10pm – 5:30pm	Day 1 Quiz
5:30pm	Transportation back to Suncoast Hotel East Entrance In-Route Recap of Day 1 – Housekeeping – Questions

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

## Day 2 Class Agenda

Thursday 10/15/20

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 8:15 am sharp.
8:15am	IMM Shuttle Pick-Up for All Attendees @ Suncoast East Entrance (side entrance near Salvatore's). This is the only pick up from the hotel.
8:30am – 8:45am	Overview of Day 2
8:45am – 9:15am	Recurring Options for Lending Documents <b>Lesson 5</b> Continued from Day 1 JSCoGenerator eSign Document Name (PDF File Name) Rules
9:15am – 10:45am	<b>Lesson 6</b> Uploading and Processing Documents in eSign Uploading and Testing Documents in eSign End User eSign Processing
10:45am	Break
11:00am – 12:30pm	eSign Document-Related Functionality
12:30pm	Lunch (New Horizons Learning Center)
1:15pm – 1:30pm	<b>Demonstration</b> Lights-Out Technology
1:30pm – 2:00pm	<b>Lesson 6</b> Continued
2:00pm – 3:00pm	eSignature Management <b>Lesson 7</b> Java Script Lab Mapping Reference File (Descriptions.txt) <b>Presentation</b> Intuitive Document Set Integration
3:00pm	Break
3:15pm – 5:00pm	<b>Lesson 7</b> Continued <b>Exercise</b> Complex Criteria JavaScript for eSign Documents <b>Exercise</b> Manually Editing the Default JavaScript <b>Exercise</b> Data-Aware Signatures
5:00pm – 5:15pm	Day 2 Quiz & Class Evaluation
5:15pm (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 \$1,600 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 30, 2020

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 (Tuesday & Wednesday only)  
Hotel has a mandatory \$20.99 + tax per day Resort Fee  
[www.suncoastcasino.com/groups](http://www.suncoastcasino.com/groups)  
IMM Group Code: **AOIMM10** to obtain special room rate listed above  
**Hotel Reservation Cut-Off: September 13, 2020**

## 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 830 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.

## LiquidOffice Form Designer Training Manual – Annual Subscription

IMM highly encourages a FI to subscribe for the LiquidOffice Form Designer Manual Program and in doing so will have access to the latest information about eSign and document design practices which will save the FI time and ensure resources are being utilized efficiently during the eSign implementation. The FI can also use the manual for internal cross training of other employees at the FI.

The manual also includes document design guidance and how documents can be mapped for eSign using Field Data Dictionary and various features of eSign. Without access to the information in the manual, the FI may have to rely on eSign Document Professional Services which is an additional charge based on the time spent with one of the IMM's experienced designer.

The manual is continuously updated to provide the latest information and offers

- General information about supported objects of LiquidOffice
- Step-by-step instructions for basic form design
- Best practices for creating/maintaining eSign documents
- Interactive Learning Exercises along with example XFMs/PDFs
- Information about using the latest version of eSign feature and its impact on eSign documents
- Information about using older supported versions of eSign
- Guidelines for updating/maintaining Descriptions.txt
- Instructions for using JSCG using exercises
- Instructions for writing criteria and widely used examples
- JavaScript Training for Data Aware Signatures and Manually Editing JavaScript along with XFM/PDF examples
- Information on configuring locked/unlocked fields for Remote or In-Person Signing

The annual subscription will entitle you to receive the major updates of the training manual three (3) times per year (February, May, and October) and minor updates throughout the year. The annual subscription fee of \$125 is billed every October for the upcoming calendar year. You may choose to subscribe at any time and the annual fee will be pro-rated accordingly. Please complete the order form on our website (Browse to Resource Center – LiquidOffice – LO AM Manual Program Enrollment Form) to receive your initial invoice and FTP link. For all releases, an email will be sent containing a FTP link to download the current manual.