

LIQUIDOFFICE INSTALLATION GUIDE

LiquidOffice v20.2 (19515)

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OBJECTIVES

LiquidOffice Form Designer must be used to create eSign documents. This installation guide explains the installation steps necessary to install LiquidOffice Form Designer 20.2 (19515).

WHEN CAN MY FI BEGIN TO USE LIQUIDOFFICE FORM DESIGNER 20.2 (19515)?

Documents designed in LiquidOffice Form Designer 20.2 (19515) are **only** supported in eSign version 2020 and above.

For that reason, you need to be **LIVE** with eSign version 2020 or above to use documents designed in LiquidOffice Form Designer 20.2 (19515).

You cannot use documents designed in LiquidOffice Form Designer 20.2 (19515) with eSign 2019 or prior versions.

WHICH LIQUIDOFFICE VERSIONS ARE COMPATIBLE WITH ESIGN 2020 OR ABOVE?

eSign 2020 or above will support:

- LiquidOffice Forms Designer 6.2.2 (9159)
- LiquidOffice Forms Designer 6.2.3 (9360)
- Autonomy Forms Designer 7.3.1 (13198)
- Autonomy Forms Designer 7.5.2 (16278)
- LiquidOffice Forms Designer 7.8 (17475)

eSign 2020 or above will not support:

- Liquid Office 4.1 (4145)

MY FI IS LIVE WITH ESIGN 2020 OR ABOVE AND I HAVE LIQUIDOFFICE 20.2, WILL I NEED TO OPEN AND SAVE DOCUMENTS DESIGNED IN PREVIOUS VERSIONS OF LIQUIDOFFICE?

No. eSign 2020 will support documents designed using previous versions of LiquidOffice.

WHAT ARE THE SOFTWARE REQUIREMENTS FOR CREATING ESIGN DOCUMENTS?

To successfully design and modify documents for use in eSign, each designer should have the following software installed on their workstation.

1. [Annual Subscription to the LiquidOffice Manual.](#)
2. LiquidOffice Form Designer 20.2 (19515).
3. JSCoDeGenerator 4.0 - This utility generates the default JavaScript code required for all eSign documents. To install the JSCoDeGenerator, use the Installation guide provided with the software.



Will IMM eSign support PDFs created with software other than LiquidOffice Form Designer?

No. IMM eSign **ONLY** supports PDFs created in LiquidOffice Form Designer.

DO NOT use any other PDF design tool to create or modify PDFs for eSign.

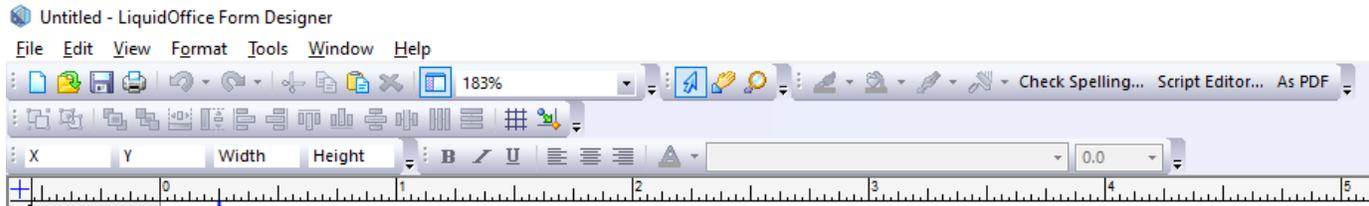
DO NOT install hotfixes or patches from the opentext website without notification from IMM.

WHAT IS MY PROCESS IF I AM UNABLE TO INSTALL LIQUIDOFFICE?

- Contact IMM Support
- If a solution is not provided, IMM Support will open a ticket with opentext.
- An opentext solutions consultant will work with you until it you successfully install LiquidOffice.

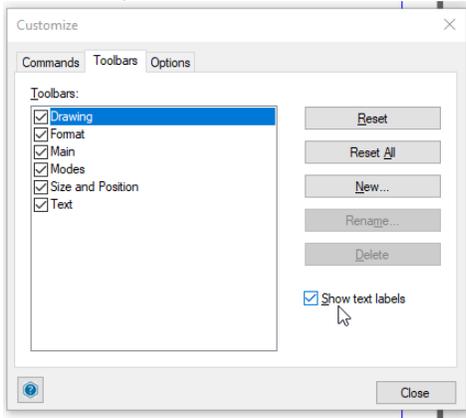
NEW FEATURES IN LIQUIDOFFICE FORM DESIGNER 20.2 (19515)

1. LiquidOffice Form Designer 20.2 (19515) no longer requires Ghost Script for importing PDFs. This is good news as in earlier versions, Ghost Script was required.
 - In the past, IMM received questions related to the Ghost Script requirement when the Financial Institution performed security assessments.
 - IMM had to test each version of Ghost Script and certify it to fulfill security concerns.
2. Expanded Help files and more detailed documentation.
3. New 3D look to the interface:
 - Some of the Toolbar buttons have changed from an icon image to text only. Some of these options are for Check Spelling, Script Editor, and Preview As PDF.

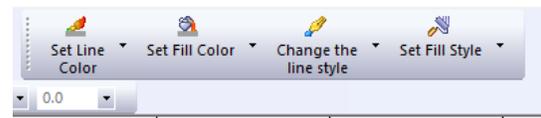


- Customize Options have been expanded with some new options in addition to rearranging the layouts.

For example, the “Show text labels” option:



Looks like this when selected:



4. Toolbar Customization is available from the Toolbar (see highlighted screenshot below) or from the Tools – Customize menu.



INSTALL LIQUIDOFFICE FORM DESIGNER

SYSTEM REQUIREMENTS

Category	Operating System
Server	<ul style="list-style-type: none"> • Microsoft Windows Server 2012 R2 • Microsoft Windows Server 2016 • Microsoft Windows Server 2019 • Oracle Solaris 10 • Oracle Solaris 11 • Red Hat Enterprise Linux 6.5-6.10 • Red Hat Enterprise Linux 7.x • Red Hat Enterprise Linux 8.x • CentOS Linux 7.x • CentOS Linux 8.x
Desktop Client	<ul style="list-style-type: none"> • Microsoft Windows 7 SP1 • Microsoft Windows 8.1 • Microsoft Windows 10 • Apple macOS 10.11 and later (for Portal, Mobile Portal, Management Console, and Process Studio only)
Mobile Client	<ul style="list-style-type: none"> • Apple iOS 12.4 and later • Android 5.1 and later • Microsoft Windows 10
<p>*When IMM Certified LiquidOffice with eSign, LiquidOffice was installed on a Windows Operating system. If LiquidOffice is installed on other operating systems at your FI, be sure to test your documents thoroughly in eSign.</p>	

Form Designer requires Java for publishing. If multiple installations of Java are found, Form Designer determines which Java installation to use by searching the following locations, stopping with the first one found:

- Java pointed to by LFD_JAVA_HOME.
- Most current installed Java 64-bit system.
- Most current installed Java 32-bit system.
- Java pointed to by JAVA_HOME.

IMM recommends the latest Java Version be installed. The latest version of Java can be installed from the Java website (<http://www.java.com/en/>).

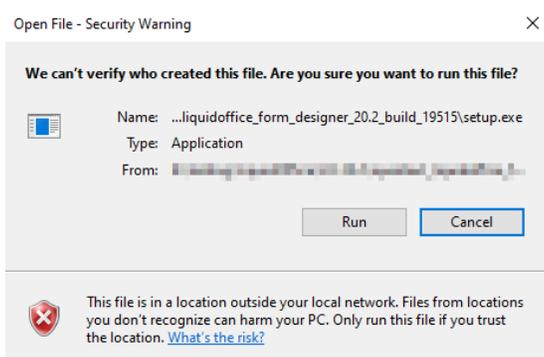
1. Select the executable file based on the type of operating system, either 64-bit or 32-bit
2. Install Java following the onscreen instructions.

INSTALL LIQUIDOFFICE FORM DESIGNER 20.2 (19515)

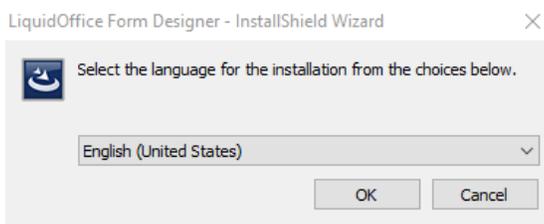
1. Click into the LiquidOffice Form Designer 20.2 folder.



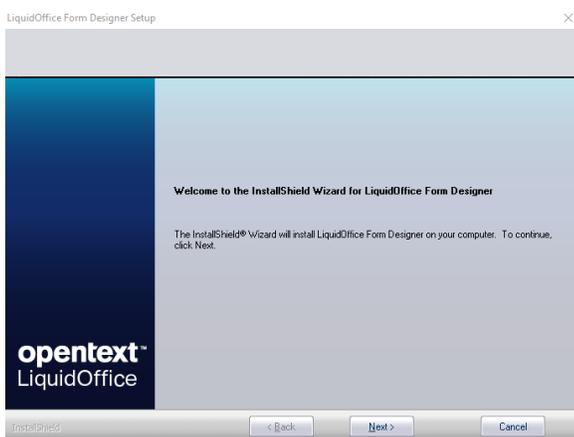
2. Double-click the **setup** executable file. Click "Run."



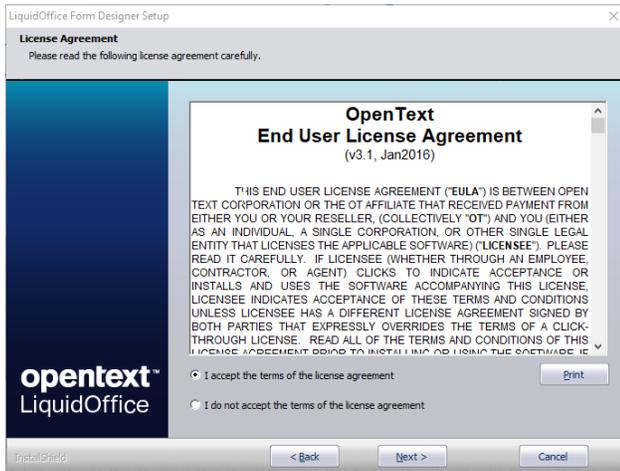
3. A prompt to select your language will appear. Click "OK" to continue.



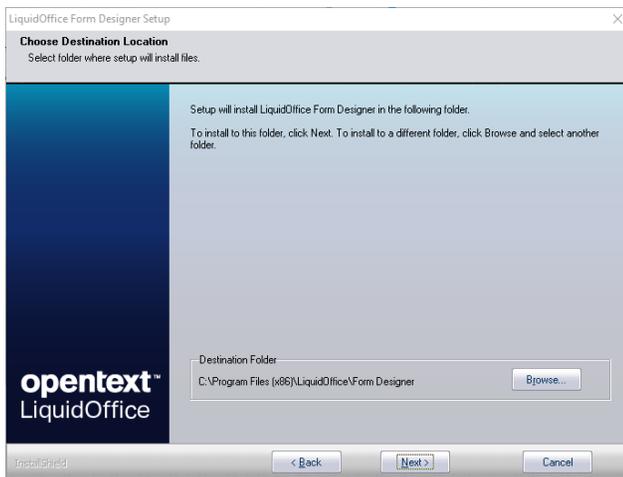
4. Click "Next."



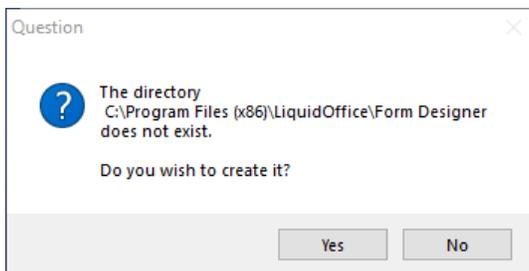
- Verify that "I accept the terms of the license agreement" is enabled and click "Next."



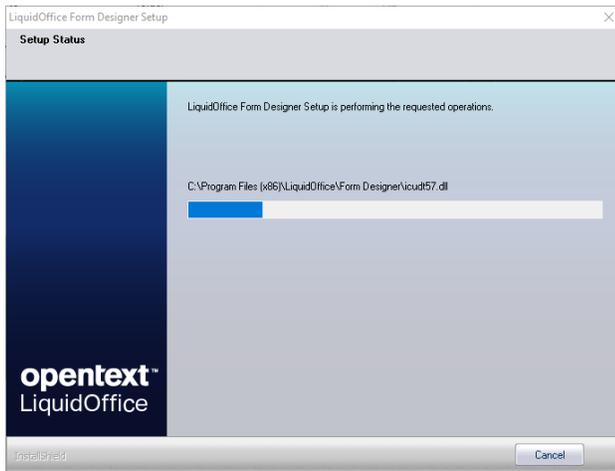
- Click "Next" to select the destination folder.



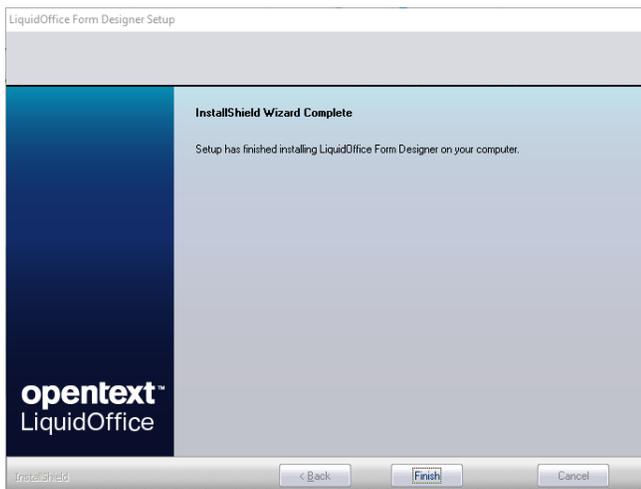
- Click "Yes" to create the folder.



10. An installation progress bar appears briefly.



11. Click Finish.



You have successfully installed the LiquidOffice Form Designer 20.2 Build 19515, which is the current version certified by IMM.

AFTER INSTALLING LIQUIDOFFICE FORMS DESIGNER SUCCESSFULLY, DO I HAVE SAVE AS TYPE "PDF – FILLABLE (*PDF)"?

- LiquidOffice Forms Designer MUST have the Save As type "PDF - Fillable (*.pdf)"
- The document MUST be saved as "Fillable PDF" to be uploaded in eSign.

If your LiquidOffice Forms Designer does not have the Save As type "PDF - Fillable (*.pdf)", follow below steps:

1. Install latest Java
 - IMM recommends the latest Java Version be installed. The latest version of Java can be installed from the Java website (<http://www.java.com/en/>)
2. Reboot your machine
3. Open LiquidOffice Forms Designer
4. Confirm the Save As type "PDF - Fillable (*.pdf)"
5. If your LiquidOffice Forms Designer does not have the Save As type "PDF - Fillable (*.pdf)" then uninstall/re-install LiquidOffice Forms Designer.

Note: If your LiquidOffice Forms Designer still does not have the Save As type "PDF - Fillable (*.pdf)" then contact IMM Support.

WHY SHOULD MY FI ENROLL IN ANNUAL SUBSCRIPTION TO THE LIQUIDOFFICE TRAINING MANUAL?

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 XFM/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

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.

TO RECEIVE UPDATES TO THE LIQUIDOFFICE FORM DESIGNER MANUAL

The LiquidOffice Form Designer Training Manual is a proprietary document, created and copyrighted by IMM to teach the basics of LiquidOffice, eSign form design, and provides all critical information that impacts the eSign solution.

Information about the Liquid Office Manual subscription program is available in the Pricing Guide, available at <https://www.immonline.com/support-guidelines/>.

To receive regular updates to this manual or to obtain additional copies for use at your financial institution, subscribe to the program:

1. Browse to <http://www.immonline.com>.
2. Navigate to: Resources > Resource Center > LiquidOffice
3. Click on the link "LiquidOffice AM Manual Program Enrollment Form."

Alternatively, you may send an email to AdminOps, who will provide guidance.

Upon receiving the completed order form, AdminOps will process the request and send the FTP link to download the manual and referenced examples.

RELEASE NOTES:

VERSION 2.0 – LIQUIDOFFICE V20.2 (19515)

- Updated for installation process for LiquidOffice v20.2 (19515).
- Added Section “When can my FI begin to use LiquidOffice Form Designer 20.2 (19515)?”
- Added Section “New Features in LiquidOffice Form Designer 20.2 (19515)”
- Removed Section “Part Two: GhostScript 9.52 Application”.
- Removed “GhostScript 9.52” from section “Required Software for Creating eSign Documents”.

VERSION 1.0 – LIQUIDOFFICE V7.8 (17475), GHOSTSCRIPT 9.05

- The information in this document has been split off from the LiquidOffice Form Designer Manual Version 20.2
- Updated to reflect updated version of GhostScript 9.52.

CONTACTING IMM SUPPORT

Feel free to contact us with any issues or concerns.

For assistance call:
800-836-4750 Option 3

Fax: 1-908-862-6446
Email: support@kinective.io

Integrated Media Management
2 City Hall Plaza
Rahway, NJ 07065