

Dear Valued Client,

We are pleased to provide you with registration information for the next IMM LiquidOffice Form Designer Training Class, which will be held virtually **October 2-5, 2023. Class size is limited to 40 attendees and will be filled on a first-come, first-served basis.**

**Special Note:** Minimum requirement of 12 registrants to host class; if minimum requirement is not met your registration will be moved to the next scheduled LiquidOffice Class.

The virtual class will be approximately four hours per day over four days (note that class times are EDT). The class will focus on designing and fielding documents in LiquidOffice Form Designer and attendees will learn best practices for customizing and building documents for IMM eSign. The concepts covered include importing existing PDF documents, mapping signatures for in-branch and remote signing, and using the JavaScript Code Generator. Attendees will also learn to set up intuitive document selection and participate in the JavaScript Lab, where they will learn to use the Expression Builder and JavaScript to enhance document functionality.

Attendees will receive examples of commonly used Expression Builder calculations and custom IMM JavaScript code that existing financial institutions have used to streamline document processing. The class is a combination of videos and hands-on training. It features a technical and operational "How To" needed by financial institution personnel who plan on designing or maintaining documents for IMM eSign.

The cost of \$1,800 covers the seminar course materials, an online training manual\*, a training environment, and live Professors with daily Q&A sessions. To register for the class, please electronically complete the [Class Registration Form](#).

The LiquidOffice Form Designer software is required and must be purchased in advance of the class. To purchase the software, complete the [LiquidOffice Software Order Form](#). This form can also be used to order the JavaScript Code Generator (JSCG), which automates the process of generating JavaScript for global fields in eSign documents. Licenses for both LiquidOffice Form Designer and the JavaScript Code Generator are issued per workstation. Each workstation running the software needs to be licensed.

Dedicated support during class hours has been incorporated into the LiquidOffice Class agenda. Please be advised that any post class assistance with an instructor would be considered billable (see [Document Pricing Guidelines](#) for more information).

We look forward to your registration and the opportunity to provide you with the skill set to master and maintain your financial institution's documents.

Sincerely,

IMM Training Faculty  
[AdminOps@immonline.com](mailto:AdminOps@immonline.com)  
800-836-4750 ext.531

## Preliminary Class Agenda\*\*

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### **Day 1 - 10/02/23**

12:15 pm	Log into Webex Event using credentials provided
12:30 pm – 12:45 pm	<b>Welcome and Introduction</b>
12:45 pm – 1:30 pm	<b>Presentation:</b> Overview of eSign and Best Practices
1:30 pm – 1:45 pm	<b>Break (15 minutes)</b>
1:45 pm – 2:30 pm	<b>Live Q&amp;A:</b> Lesson 1 – 4 and Lesson 6 Training Videos <b>Systems Accessibility Check:</b> <ul style="list-style-type: none"><li>• Forms Designer Toolkit downloaded</li><li>• LO and JSCG installed and functional</li></ul>
2:30 pm – 3:00 pm	<b>Break (30 minutes)</b>
3:00 pm – 4:00 pm	<b>Presentation:</b> Lesson 5: Guidelines for Creating eSign Documents
4:00 pm – 4:15 pm	<b>Break (15 minutes)</b>
4:15 pm – 5:00 pm	<b>Presentation:</b> Lesson 5: Guidelines for Creating eSign Documents

### **Day 2 - 10/03/23**

12:15 pm	Log into Webex Event using credentials provided
12:30 pm – 1:30 pm	<b>Presentation:</b> Lesson 5: Guidelines for Creating eSign Documents (Continued from Day 1)
1:30 pm – 1:45 pm	<b>Break (15 minutes)</b>
1:45 pm – 2:30 pm	<b>Presentation and Hands-On Exercise</b> - Lesson 6: Uploading and Processing Documents in eSign
2:30 pm – 3:00 pm	<b>Break (30 minutes)</b>
3:00 pm – 4:00 pm	<b>Presentation and Hands-On Exercise</b> - Lesson 6: Uploading and Processing Documents in eSign

4:00 pm – 4:15 pm	<b>Break (15 minutes)</b>
4:15 pm – 5:00 pm	<b>Presentation and Hands-On Exercise</b> - Lesson 6: Uploading and Processing Documents in eSign – <b>Quiz #1</b>

**Day 3 - 10/04/23**

12:15 pm	Log in using credentials provided
12:30 pm – 1:30 pm	<b>Presentation and Hands-on Exercises</b> - Lesson 7: JavaScript Lab
1:30 pm – 1:45 pm	<b>Break (15 minutes)</b>
1:45 pm – 2:30 pm	<b>Presentation and Hands-on Exercises</b> - Lesson 7: JavaScript Lab
2:30 pm – 3:00 pm	<b>Break (30 minutes)</b>
3:00 pm – 4:00 pm	<b>Presentation and Hands-on Exercises</b> - Lesson 7: JavaScript Lab
4:00 pm – 4:15 pm	<b>Break (15 minutes)</b>
4:15 pm – 5:00 pm	<b>Presentation and Hands-on Exercises</b> - Lesson 7: JavaScript Lab

**Day 4 - 10/05/23**

12:15 pm	Log in using credentials provided
12:30 pm – 1:30 pm	<b>Presentation and Hands-on Exercises</b> - Lesson 7: JavaScript Lab
1:30 pm – 1:45 pm	<b>Break (15 minutes)</b>
1:45 pm – 2:30 pm	<b>Presentation and Hands-on Exercises</b> - Lesson 7: JavaScript Lab
2:30 pm – 3:00 pm	<b>Break (30 minutes)</b>
3:00 pm – 4:00 pm	<b>Presentation and Hands-on Exercises</b> - Lesson 7: JavaScript Lab
4:00 pm – 4:15 pm	<b>Break (15 minutes)</b>
4:15 pm – 5:00 pm	<b>Quiz 2 &amp; Class Closing</b>

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

**\*\*\*JavaScript Lab Overview**

*This class 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 interpret 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 show attendees how to modify this code as it pertains to specific documents. The lab will also be used as an open forum for questions about the document conversion process. Listed below are examples of what will be covered in the "Lab."

**Intuitive Document Selection:**

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

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

**Expression Builder Examples:**

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

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

*\*The following information will be provided to you as you get closer to attending the virtual class. Please review the information carefully and let me know if you have any questions.*

**Calendar Invites:**

Four (4) calendar invites will be sent via email to block the class hours on your calendar; it will contain the day's agenda, web-ex links along with the access code.

**Pre-Requisite Video Assignment: Very Important!**

You will be receiving an email containing six (6) required pre-requisite videos, which provide attendees with the very basics of LiquidOffice. The hands-on exercises included will help you acquire the design skills that we will build upon in our live instruction. In particular, the exercise "Create the Membership Application" is crucial to ensuring that you arrive on Day 1 with the required skills and be prepared with questions that will allow you to take full advantage of the live instruction. Day 1 will start where the videos leave off!

**\*LiquidOffice Form Designer Manual Program (Annual Subscription)**

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

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

- General information about supported objects in LiquidOffice
- Step-by-step instructions for basic document design
- Best practices for creating/maintaining eSign documents
- Interactive learning exercises and with example XFM/PDFs
- Information about the features of the latest version of eSign and their impact on eSign documents
- Information about using older supported versions of eSign
- Guidelines for updating/maintaining Descriptions.txt
- Instructions for using JSCG and accompanying exercises
- Instructions for writing criteria and widely used examples
- JavaScript training for adding data-aware signatures to documents and manually editing the JavaScript code, along with XFM/PDF examples
- Information on field locking/unlocking for Remote or In-Person Signing

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

The manual also includes document design guidance, explains how documents can be mapped for eSign using the field data dictionary, and provides information on various features of eSign. Without access to the information in the manual, the financial institution 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 designers.

The annual subscription will entitle you to receive major and minor updates throughout the year, as updates are made available. The annual subscription fee of \$275 is billed annually and you may choose to subscribe at any time. To enroll in the LiquidOffice Manual Program annual subscription plan, please use the [LiquidOffice Form Designer Training Manual Program Enrollment Form](#).

## **Links to LiquidOffice Resources:**

[IMM Resource Center](#)

[LiquidOffice Form Designer Software Order Form](#)

[LiquidOffice Form Designer Training Manual Program Enrollment Form](#)

[Questionnaire for eSign Documents](#)

[Document Pricing Guidelines](#)