

# PE Full Suite Introductory Training

## Customer Expectation Document

### XMPie PersonalEffect Suite

Software version: PE v8.0x / uStore v8.3

Document version: v4.0

Published date: January 2016



one to one in one™

A **xerox**  Company

# Notices

© 2016 XMPie®, A Xerox Company. All rights reserved.

U.S. Patent 6948115, 7406194, 7548338, 7757169 and pending patents. JP Patent 4406364B and pending patents.

PersonalEffect Full Suite Training, Customer Expectation Document, Document Revision: 4.0, January 2016

For information, contact XMPie, A Xerox Company.  
485 Lexington Avenue, 10th Floor  
New York, NY 10017

More information can be found at [www.xmpie.com](http://www.xmpie.com)

XMPie provides this publication "as is" without warranty of any kind, either express or implied. This publication may contain technical inaccuracies or typographical errors. While every precaution has been taken in the preparation of this document, the publisher and author assume no responsibility for errors or omissions. Nor is any liability assumed for damages resulting from the use of the information contained herein. Changes are periodically made to the information herein; these changes will be incorporated in new editions of the publication. XMPie may make improvements and/or changes in the product(s) and/or the program(s) described in this publication at any time.

XMPie, the XMPie logo, PersonalEffect, uChart, uCreate, uDirect, uEdit, uImage, uPlan, uProduce, uStore, StoreFlow, Circle, ADOR, XLIM, RURL, Hosted e-Media Express Edition, and the slogan "one to one in one" are trademarks or registered trademarks of XMPie, A Xerox Company, and may not be used without permission. No part of these materials may be used or reproduced in any form, or by any means, without the express written consent of XMPie. To request permission to use these materials, please contact [marketing@xmpie.com](mailto:marketing@xmpie.com).

XEROX® and XEROX FreeFlow®, FreeFlow Output Manager®, FreeFlow Process Manager®, and FreeFlow Core® are trademarks of Xerox Corporation in the United States and/or other countries.

Adobe Acrobat, Adobe Dreamweaver, Adobe Illustrator, Adobe InDesign, Adobe Photoshop and Adobe After Effects are trademarks of Adobe Systems Incorporated.

SQL Server 2008, SQL Server 2008 R2, Windows Server 2008, Window Server 2012, Windows 7, Windows 8, Windows 10, Microsoft Office, Microsoft Excel and Microsoft Access are trademarks or registered trademarks of Microsoft Corporation.

Mac OS is a trademark of Apple Computer, Inc.

ComponentArt is a trademark of ComponentArt Inc.

Other trademarks and service marks are the property of their respective owners.

# Contents

- About this document . . . . . 5**
  - Quick Reference . . . . . 5
  - What to do before training . . . . . 5
  - Who should attend each day's training . . . . . 5
- About PersonalEffect. . . . . 7**
- Course overview . . . . . 11**
  - Duration and delivery method . . . . . 11
  - Number of participants . . . . . 12
  - Who should attend . . . . . 12
  - Goals and objectives . . . . . 13
- Prerequisites and preparation . . . . . 15**
  - Adobe training. . . . . 15
  - Adobe InDesign skills . . . . . 15
  - Adobe Dreamweaver skills . . . . . 15
  - General computer skills . . . . . 16
  - Web Design/Administrative skills . . . . . 16
  - Database and logic skills . . . . . 17
  - English language. . . . . 17
  - Pre-training tutorials. . . . . 17
- Required facilities and equipment. . . . . 19**
  - Room requirements . . . . . 19
  - Network, printer and internet access . . . . . 20
  - Computer and software . . . . . 20
  - XMPie server installation . . . . . 20
  - XMPie eMail Service . . . . . 21
  - XMPie Circle Connection . . . . . 21
- Course agenda. . . . . 23**
  - Day 1 . . . . . 23
    - Setup . . . . . 23
    - Module 1 - Introduction and overview . . . . . 23
    - Module 2 - Basic print campaign. . . . . 24
    - Module 3 - Print production on the uProduce server. . . . . 25
  - Day 2 . . . . . 26
    - Module 4 - uStore introduction and walk-through . . . . . 26
    - Module 5 - uStore back office intro (startup tasks) . . . . . 26
    - Module 6 - Basic store startup. . . . . 27
    - Module 7 - Testing products and processing orders . . . . . 27
    - Module 8 - Other uStore back office tasks . . . . . 28
    - Module 9 - Dynamic web-to-print product overview. . . . . 28

# Contents

- Day 3 ..... 29
  - Module 10 - Basic VDP-W2P campaigns  
(part 1 - template creation) ..... 29
  - Module 11 - Basic VDP-W2P campaigns  
(part 2 - product setup) ..... 30
  - Module 12- Making changes to VDP-W2P product..... 31
- Day 4 ..... 32
  - Module 13 - Campaign planning and resource setup ..... 32
  - Module 14 - Creating the campaign logic..... 33
- Day 5 ..... 34
  - Module 15 - Creating email documents ..... 34
  - Module 16 - Creating the personal website ..... 35
  - Module 17 -Printing from Circle..... 35
  - Module 18 -Marketing Console ..... 36
- Optional Training .....37**
  - Optional modules ..... 37
    - Module 19 - Intermediate campaign objects/logic ..... 37
    - Module 20 - Advanced print production options ..... 38
    - Module 21 - Adding lead acquisition to campaign ..... 38
    - Module 22 - ulmage Introduction ..... 39
    - Module 23 - uChart introduction..... 39
    - Module 21 - High-level overview of web service APIs ..... 40
  - Onsite courses ..... 41
  - Online courses ..... 42
  - Custom courses ..... 42
  - Further information..... 42
  - XMPie Sites..... 43

# About this document

The purpose of this document is to set clear expectations and recommendations prior to training in XMPie PersonalEffect® Full Suite Introduction. Training is an investment, so we want to provide maximum value to your organization by ensuring that the experience is engaging and successful for participants and that there is maximal transfer of knowledge and information into your company. This document aims to outline what is needed to achieve this goal, together with more detailed information about what topics will be covered during the training.

There is a lot of information in this document, from what to do setup the training room and required skills to the agenda which includes who should attend. Below is a quick reference to help consolidate, what to do leading up to training, and who should attend the training days.

## Quick Reference

### What to do before training

**Tutorials:** We have several tutorials on our XMPie Campus site. While it is not required to do the hands-on, it is highly recommended. Even for those not using the actual XMPie plug-ins and applications, it is helpful if you take the time to review the tutorials. Refer to the Pre-Training Tutorials for more information.

**XMPie environment:** It is preferred that training is given on your own system, exceptions can be made if planned for in advance. Refer to the Required facilities section for more information.

**Room Setup:** (usually done right before training): Besides the XMPie environment, it is best to coordinate how you will setup the training area (eg when you will install applications, move computers if needed and such). Refer to the Required facilities section for more information.

### Who should attend each day's training

Each day's hands-on lessons are built on the previous days' training. We understand that it is not always possible to take everyone away from their regular routines for 5 days, it is recommended that a small core group of XMPie software users and a lead attend every day of training. The core group could be a print designer, a web designer, a database/ mailing list manager, store product administrator, an API programmer (if using system as a platform) and/or a web developer, and a project manager. See the Agenda for more information on each day's requirements.

**Day 1:** Everyone that works with, sells, manages those that do either, or wants to know about XMPie should attend the overview. After the overview, it is recommended that everyone that will use XMPie software in any way stay for the basic training, even if they are not doing the hands-on.

**Day 2:** Everyone that works with, sells, manages, designs/creates products, or handles orders should attend the overview of uStore. After that, those using the ecommerce back office should attend.

**Day 3:** Designers creating products, and those using the back office should attend.

**Day 4:** Everyone that works with, sells, manages, designs or creates cross media campaigns should attend the campaign planning session. After that, those developing the campaign should attend.

**Day 5:** Those developing cross media campaigns should attend.



# About PersonalEffect

The full PersonalEffect Suite consists of several integrated software products designed to support high volume VDP output, personalized web sites, personalized emails, and ecommerce sites that can offer a catalog of products including uploaded products or customizable print and email products.

The full suite training is recommended when you have purchased one of the following configuration packages:

- PersonalEffect StoreFlow or StoreFlow Pro with Cross-Media add-on,
- PersonalEffect TransMedia or TransMedia Pro with the uStore add-on, or
- Enterprise Cross-Media with uStore add-on.

The base configuration, for each of the above packages, is a powerful variable data print (VDP) platform with both desktop- and server-based tools to handle high volumes of VDP output, and multiple VDP jobs at once.

In addition to enhanced productivity, each system also provides the added benefit of allowing your data experts, designers and production specialists to work within their own disciplines on specific tasks, automatically combining the results into a cohesive one-to-one communication piece with minimal workflow constraints.

With the addition of TransMedia/Cross-Media, you can use personalized print and/or email to drive customers to their personal response URL (RURL) websites then track and analyze responses with the XMPie Analytics. This measurement and reporting assures the marketing team that the next wave of the campaign can be more relevant to the recipient – thus leading to higher response rates and greater return on investment.

With the addition uStore (part of StoreFlow), you can quickly and easily create different storefronts for your customers each with different branding and products. StoreFlow enables the web-based sale or ordering of all kinds of products including promotional products, preprinted, print on demand, and fully personalized dynamic (print or email) products customized by the buyer at the time of purchase.

**Often the above software packages have custom configurations when sold. It is important to note which software configuration was purchased, as this has some effect on training and workflows.**

The most notable difference in packages is the type of print production server (or servers) purchased. The production (and/or development) server comes with one or two print composition mechanisms, XMPie XLIM (XMPie's proprietary layout engine) or with both, XMPie XLIM and the Adobe InDesign CC Server, noted as XE or IND respectively.

Our software products, which you may or may not have one or more licenses for, are presented below as a check-list, so that you can verify (through support or your trainer) which products were purchased.

Cloud software (requires an account to use):

- Circle - SaaS software, used as a production hub for cross-media campaigns, and digital storyboard solution for planning and visualizing 1:1 multichannel communications campaigns

In-house Server software (most require a web browser to login and use):

- uProduce Dashboard - the interface to the uProduce server or server cluster
- XMPie XLIM - for dynamic print template composition

- ❑ Adobe InDesign CC Server - for dynamic print template composition
- ❑ Open XM™ with XMPL Server (2G) - used to serve personalized websites, hosted on the server or via remote connection
- ❑ Circle Agent (2G) - component used to allow communications between Circle and uProduce
- ❑ uProduce RURL Wizard (1G) - a rapid response URL site builder and page editor \*
- ❑ uProduce Marketing Console (one of two versions) - the interface to view tracked analytic data
- ❑ uStore - to build ecommerce web-to-print (or web-to-email) storefronts
- ❑ Xerox FreeFlow Core - a prepress workflow solution that integrates with uStore
- ❑ XMPie API SDK - documentation and walkthroughs on using our APIs
- ❑ XMPie Email Service (XES) - our service integrates with ExactTarget or Amazon SES to deliver personalized emails

Xerox FreeFlow Core add-on modules\*\*:

- ❑ Xerox FreeFlow Advanced Prepress - extended prepress features
- ❑ Xerox FreeFlow Advanced Automation (which includes Advanced Prepress) - extended features include automation, automation logic, high level prepress and workflow options

Other add-on server software:

- ❑ ulmage Processing Unit or ulmage Photo Processing Unit - for processing ulmage templates
- ❑ uChart - for producing data-driven graphs within print template production

Desktop software:

- ❑ uCreate Print and/or uCreate Designer - an Adobe InDesign to create dynamic print templates
- ❑ uCreate Digital (2G) - for Adobe Dreamweaver to create/modify dynamic web and email templates
- ❑ uCreate XM (1G) - for Adobe Dreamweaver to create/modify dynamic web and email templates\*
- ❑ uDirect Video - for Adobe AfterEffects to create dynamic video documents
- ❑ ulmage - for uCreate Print, Adobe Photoshop, and/or Adobe Illustrator to create personalized imagery
- ❑ uChart - for uCreate Print to create personalized data-driven graphs
- ❑ uPlan - an application to connect complex data structures and write sophisticated logic



We suggest that customers with a TransMedia configuration activate their XMPie Circle subscription before training starts. This SaaS system provides flexibility and features that extend your cross-media capabilities and is required for cross-media campaigns.

At this time customers that purchase or have cross-media configuration are entitled to a free Circle account, for more information please email [special@xmcircle.com](mailto:special@xmcircle.com) or ask their account representative.

Your training may not cover all of the above software products, content is dependent upon the training goals, purchased products, the trainees experience and the allotted time.

\* Software supporting the 1G workflow, has been deprecated and will only be included, in your installation, if absolutely necessary.

\*\* Xerox FreeFlow Core add-on modules are not taught during the XMPie training, however, the products might be discussed, as needed, during overviews or uStore training.



# Course overview

This course is designed to provide introductory training on the latest version of XMPie PersonalEffect suite of software applications for people who have no previous experience with XMPie products.

The course starts with a brief introduction and review of the agenda. The introduction will also describe the concept of VDP, web-to-print (W2P) portals, the concepts of TransMedia communications, and why each are an important tool for today's marketers and print service providers. Examples of web-to-print and transmedia campaigns may be shown to help illustrate this if necessary.

Participants will start with XMPie's desktop tools for building business rules (logic) and to create the VDP print templates. The production server is then introduced to show the collaborative teamwork approach to building campaigns and the performance of server-based print production.

The course then moves on to creating the online stores that host a variety of document types and how users interact with storefronts. Store, product, user and other management requirements of e-commerce sites are discussed and reviewed

The course continues on to creating the personalized emails and websites using XMPie OpenXM technology, cross-media tools and Adobe Dreamweaver.

Throughout the course, basic topics/features will be discussed and demonstrated, providing a solid foundation for setting up campaign/business rules, creating variable templates for print, web and email, then deploying and measuring the final campaign results, , along with basic store fronts and products..

**Special Note:** *Through out this document you will see mention of 1G & 2G references for cross-media/transmedia and our related software. 2G references the next generation of XMPie cross-media technologies. 1G is deprecated, and currently is only needed for uStore products that incorporate cross-media features. This uStore requirement, using 1G, will be in effect until the next release of uStore v8.5 and/or uStore v9.0 It has been anticipated that you will not need 1G topics, and thus they are not included in this training. Please work with your instructor if you believe you will need these topics.*

## Duration and delivery method

Five (5) days onsite instructor-led training\*. In order to get the best value from this training, please refer to the [Required facilities](#) section later in this document.

\* If ten (10) days are purchased for the full suite, please request the PersonalEffect Full Suite Advanced Training CED, which outlines the agenda for introductory and advanced topics. If the intent of those 10 days, is to repeat this course, twice, to different groups, then you are referencing the correct 5-day CED.

## Number of participants

It is recommended to limit the number of participants to 10.

Our training instructors will present the course at the level and pace of the group. With smaller, more experienced groups, there is generally more interaction, which enables us to identify features that are relevant to your business and to go into more detail on these topics providing more value for your organization.

Inversely, if there are more than the recommended number of participants, or if trainees don't have the necessary skills and experience outlined in [Prerequisites and preparation](#), we cannot guarantee that all training goals will be reached, and the amount of interaction and help provided to each participant is reduced.

## Who should attend

This course is designed for customers who have just purchased XMPie PersonalEffect Full Suite of products, or where new staff have joined the organization with little to no previous knowledge of XMPie products.

The team involved in creating and deploying a multi-channel marketing campaign is very diverse. The [Course Agenda](#) lists the target audience for each module of the course.

In general the course is designed for:

- Print designers, who will create InDesign document templates for use with uCreate Print/Designer.
- Web designers, who will create web and email document templates using Circle, Dreamweaver and uCreate Digital.
- Web designers or developers, who will create web and email templates using Circle and the XMPL-SDK .
- Marketing or business specialists, who will determine the business rules or logic that will be used to change the document design based on values in the database.
- Database administrators, who manage the data which will be used for the marketing campaigns.
- Prepress or production staff, who will create the variable data print output from the InDesign document templates using XMPie desktop or server applications.
- Store Administrators, who will manage and handle orders, invoicing and reporting.
- System analysts, project managers, support engineers, trainers, demonstrators, and any other personnel, who will demonstrate, use, train, or support Adobe and XMPie products within the company.

This course is designed as “introductory” training, so it will start with the expectation that attendees will have no previous knowledge of the XMPie products. However, it is expected that participants will have:

- a working knowledge of Adobe InDesign, Adobe Dreamweaver, and Adobe Photoshop,
- a basic understanding of the aim / objective of cross-media campaigns,
- basic skills with handling data (CSV, Microsoft® Excel®, Access®) along with some logic/scripting skills,
- a basic understanding of internet technologies, ecommerce concepts and solutions, plus
- a working knowledge of building websites, HTML, and basic scripting skills.

A complete list of [Prerequisites and preparation](#) is outlined later in this document.

## Goals and objectives

In addition to using the XMPie software purchased, at the end of this course, participants will be able to:

- Communicate the benefits of personalizing multi-channel marketing materials.
- Communicate the benefits of web-to-print marketing portals.
- Create VDP (print) templates which include various dynamic objects types.
- Recognize, create and use different types of ADOR objects and script their expressions.
- Understand and use a few advanced features and functions (e.g. XMPie barcode function, copy fitting, dynamic print, etc.) where applicable.
- Understand and design for the server input document format (XLIM and/or InDesign) required for production.
- Generate print PDF output files for a range of database recipients. Different VDP output format can be shown as requested.
- Use XMPie Circle as a production hub, and/or for planning and collaborating on multi-channel marketing campaigns.
- Create new personalized response websites using pre-made web templates and/or from custom HTML designs, including personalized HTML and text email documents.
- Create and use web-form pages to insert and/or update recipient information in the database.
- Configure triggered on-demand emails from campaign web pages.
- Discuss and test sending bulk marketing emails, if configured to do so.
- Analyze marketing campaign statistics using various charting types and data lists.
- Understand the importance of SPAM regulations and use the technology wisely to avoid blacklisting.
- Create, configure, and customize online stores and products.
- Configure uStore global properties and review general settings.
- Generate basic uStore reports.
- Create and manage users, user groups, permissions and approval processes.
- Handle and process store orders.
- Create and test simple prepress workflows for output using FreeFlow Core (where applicable).



# Prerequisites and preparation

## Adobe training

If participants are new to Adobe InDesign, Photoshop or Dreamweaver, it is recommended that they first participate in an Adobe training course for these products. Adobe offers a wide range of courses including recorded tutorials, online, classroom and onsite training in most countries.

For more information refer to: <http://helpx.adobe.com/learning.html>

## Adobe InDesign skills

Participants should have a working knowledge of Adobe InDesign before using uCreate Print/Designer.

If participants in the print component of training are not regular users of Adobe InDesign, it is recommended that they take some time to refresh their knowledge of InDesign before the course.

Specific InDesign skills to review:

- Create new and modify existing InDesign documents including adding/deleting pages.
- Create text boxes, place text and change text attributes (fonts, colors, etc.) and paragraph attributes.
- Create graphic boxes, place images and use controls to scale, transform, etc.
- Create layers, move objects to different layers and identify which layer an object is on.
- Insert a table, format rows, columns and cells.
- Experience with font, paragraph, object and table styles.

While not necessary, it is desirable for participants to understand prepress best practices for document design. - For example to understand how image size and transparency affects print speed. - These basic prepress skills will help to ensure that the documents created will process and print efficiently.

## Adobe Dreamweaver skills

In addition to basic web publishing knowledge, participants should have a working knowledge of Adobe Dreamweaver CC 2015 before using uCreate Digital.

If participants in the web and email components of training are not regular users of Adobe Dreamweaver, it is recommended they take some time to refresh their knowledge of Dreamweaver before the course.

Specific Dreamweaver skills to review:

- Configure a new website via the site manager.
- Manage remote site (e.g. synchronizing, ftp, remote network) via the site manager.
- Create anchors and references to link to other pages.
- Create form pages with text, hidden, radio, select and submit form objects.
- Add and editing text, changing fonts via tags and/or css.
- Add and position images and other html page elements.
- General web page design or layout with tables or css. (Responsive design experience is helpful.)

While not necessary, it is desirable for participants to understand data-driven website concepts.

## General computer skills

The Adobe creative tools, XMPie uCreate Print and uCreate Digital are compatible with both Microsoft Windows and Apple Macintosh computer systems. XMPie uPlan is Windows-only tool. It is expected that participants will be able to operate their computer to start applications, open and save documents, and send or copy print files to production printers.

When working with multiple, separate computer systems (client workstations, production servers, and output devices/RIPs) knowledge of basic networking is essential.

Because RURL sites exist on external/internet environment, an understanding of basic internet protocols is required (e.g. DNS, SMTP, FTP, HTTP) as well as, how to connect to Windows Servers.

## Web Design/Administrative skills

It is preferred to use Adobe Dreamweaver and uCreate Digital, however, XMPie's Open XM technology, is based on industry standard HTML and Javascript code snippets, so any HTML editor can be used.

During training, the instructor will typically use Dreamweaver and the uCreate Digital plug-in to show the basic concepts of using ADORs within a web site. If desired, and if participants have the necessary skills, they can use their preferred editor to create personalized pages during training, however the instructor cannot be responsible to troubleshoot their code during training. For more information on XMPL SDK, please refer to the [XMPie Sites](#) section of this document.

If participants in the web and email components of training are not familiar with web technologies, and it is your company requirement to be able to host personalized pages beyond using the XMPL server, we recommend learning the platform you will be using (for example Word Press), and other web administrative skills:

Specific skills to review:

- Internet protocols (e.g. DNS, SMTP, FTP, HTTP) and managing remote web sites and servers, their files, connections..
- Creating new websites (typically a published site and a testing site) using the web platform of your choice.
- Implementing web page redirection, if the desire is to use friendly URLs vs. long/absolute URLs. (For example, using Apache Rewrite rules, Helicon ISAPI Rewrite or other similar technologies.)
- Must be familiar with HTML, CSS, Javascript, and the XMPL (XMPie language/code).
- Data-driven website concepts including implementing forms with text, hidden, radio, select and submit form objects.
- Responsive web design concepts and related skills to implement, as needed.



## Database and logic skills

The heart of variable data printing is the data. Participants should be able to:

- Manipulate data using Microsoft Excel, Microsoft Access or other similar programs.
- Explain data concepts such as tables, rows, columns, sorting and deduping.
- Explain the differences in data value types (e.g. text, number, date).
- Explain the principles of basic programming logic (e.g. if/else statements, substring).

While not necessary, an introductory knowledge of relational database concepts and SQL would be an advantage.

## English language

By default, training will be provided in English. Some of our instructors are proficient in a second language. However, there may be a delay and additional travel costs to schedule the appropriate person. Please contact your XMPie Account Manager for further information.

## Pre-training tutorials

This course will start from an introductory level using uCreate Print or uCreate Designer. However, it is highly recommended that participants in this training get a head-start by downloading, working through some of our tutorials. We suggest starting with the uDirect "Open House" (aka Classic) Tutorial (for EDU) to get a feel for how we create and place dynamic content into templates.

The XMPie Cross Media Tutorial 'Round World Travel Campaign, is an excellent document that can be used before training to help prepare for those topics and after training as a review of procedures.

Also, for uStore, there is an excellent eLearning video, **Introduction to StoreFlow 8**, which can save time during several training topics, if completed before the onsite training.

To review training materials, download tutorials and watch video, please visit XMPie Campus. For links to this and other sites, see the [XMPie Site](#) section at the end of this document.

This will provide an opportunity to maximize time with the trainer on more advanced topics and to discuss any questions raised during your self-study.



# Required facilities and equipment

## Room requirements

For maximum value, training should be conducted in a quiet room away from production equipment or office areas. The following is a check list for the training room:

- ❑ An instructor desk/table, with a connection to video projector or large flat panel display is required, along with a connection to the network (and/or internet as needed). Instructors will bring their own company-provided laptops with required software and implemented security features (e.g. antivirus, firewall).
- ❑ Individual Mac/Win workstations for trainees with network, internet and required software:
  - Adobe InDesign, Photoshop, and Dreamweaver,
  - XMPie uCreate Print (Professional, Designer or 30-day trial),
  - XMPie uImage is installed with uCreate Print (runs as trial without a license),
  - XMPie uCreate Digital for DW CC2015 (needs to be licensed and on at least one workstation),
  - XMPie uPlan (on at one or more Windows workstations, licensed or 30-day trial)  
(more details regarding workstations, network and software follow in this section).
- ❑ Please have a list prepared of the URLs and passwords to access your Circle Account, uProduce dashboard, Marketing Console, and the details of any printer/rip that will be used to test print output during the training.

Site	URL	User or Admin (if not default) <i>(ex. admin1)</i>	Password (if not default) <i>(ex. p@ssw0r4)</i>
Circle	http://xmcircle.com		
uProduce Dashboard	<i>(ex. http://servername_or_IP/xmpiedashboard)</i> http://	<i>(ex. user1)</i>	<i>(ex. p@ssw0r4)</i>
	<i>(ex. http://servername_or_IP/uStoreAdmin)</i>	<i>(ex. admin)</i>	<i>(ex. admin)</i>
uStore	http://		
Marketing Console	<i>(ex. http://servername_or_IP/marketingconsole)</i> http://	<i>(ex. user1)</i>	<i>(ex. p@ssw0r4)</i>

### Other

- ❑ Some servers may need remote access, having this information on hand is helpful.
- ❑ A whiteboard or presentation flip chart (and markers), would be useful but is not required.
- ❑ There will be breaks throughout the day, so beverages (facilities or service) for attendees would be welcome.

## Network, printer and internet access

A connection to the company network is required for each participant and the trainer. Connection to the internet may also be required to access servers outside of the network (as needed). If the trainer is not allowed on your network, then he/she will require internet access to their XMPie Training Server.

It is requested that your IT network or system administrator be available to assist when the instructor arrives.

## Computer and software

All participants must have their own computer, or share access to a computer for this training. Computers can use either the Macintosh or Windows operating systems, however there must be at least one workstation with Windows in order to install and use the uPlan application.

Computers must have Adobe InDesign, Photoshop and Dreamweaver, with version CS6, CC2014 or CC2015\*. For the purposes of training, it is possible to use a 30-day trial version of the Adobe products.

**NOTE:** It is critical that the Adobe applications be installed prior to the start of training. Downloading and installing a trial version takes considerable time and will leave participants behind and seriously disadvantaged. Also, it is essential that participants refresh knowledge of these applications. See [Prerequisites and preparation](#) for a more detailed list of skill sets.

It is also recommended to have the XMPie Desktop tools installed prior to training. You will receive download links from your XMPie, Xerox or channel partner support team. If participants will not be using their own computer for training, we can issue 30-day trial licenses for training purposes. Please be aware that our desktop 30-day trial license keys may unlock more functionality than the product purchased and after this period, the trials revert to normal trial functionality. To obtain these temporary licenses, please contact XMPie support or your trainer, [support@xmpie.com](mailto:support@xmpie.com), prior to training.

\* uCreate Digital and uCreate XM have specific requirements for Dreamweaver CC versions. Please consult the System Requirements section of the [XMPie Personal Effect CED v8.0](#) for more information about these products and all of the above applications.

## XMPie server installation

**XMPie, Xerox or your channel partner will install and test the server products you have purchased. It would be preferred, if this installation process is completed before the training.**

In the event that servers are not available in time, the trainer will use temporary, remote training servers. This means that afterwards, the sample campaigns, websites and documents created during training will not be available onsite.

If the XMPL server should be configured for FTP or network access to pull/push web pages and files. This should be done with the installation of software or before training.

If the configuration of the XMPie system includes a proxy server, this server requires an application called ISAPI Rewrite (by Helicon) which needs to be updated when new stores are generated/reconfigured and if the XMPL Server not installed on this server. Remote access to the proxy server is required to run the update utility for this server. This process should be tested before training and remote access granted to someone attending training.

Some skinning of uStore stores requires remote access to the uStore server, to access and modify the files required to make changes to the skins. This should be tested before training and remote access granted to someone attending the training.

## XMPie eMail Service

When you purchase a configuration that includes cross-media, you will receive a one-year basic subscription to XMPie eMail Service (XES). With your license keys, an informational letter with a coupon can be used on the XES Store to purchase the email service plan you desire. If you did receive this letter or coupon, please send a request to [support@xmpie.com](mailto:support@xmpie.com) and they will provide the necessary information.

Having this service setup before training allows us to use it during exercises. If it is not ready, the trainer will discuss how it works.

## XMPie Circle Connection

At this time, when you purchase a configuration that includes cross-media, you are eligible for a one-year subscription of Circle Team Edition with an option to upgrade to Circle Business Edition. With your license keys, you will receive an informational letter that includes instructions to sign-up and/or complete your registration for this account.

In order to use some of the features included with the Circle Team and Business Editions, you must have its connection software (Circle Agent) installed on your XMPie production system. The support team will install this application during your server installation. It may however need some configuration adjustments before training.

Having this service setup before training allows us to use it during exercises, and is required. Your trainer may need to test this functionality on the first or second day of training.



# Course agenda

The following agenda is provided as a guide only. The pace of the course may change depending on the skills, experience and progress of the participants.

- Day 1 content and exercises are based on producing print-only campaigns
- Days 2 and 3 content and exercises are based on getting a store front up and running
- Days 4 and 5 content and exercises are based on getting a cross-media campaign started

This is a lot of material in 5 days, we highly recommend doing pre-training tutorials before the onsite training, so that the basics can be covered quickly allowing more time for Q&A or other topics, as time permits. Depending on your company's goals, the cross-media content can be covered before the store-front content, make sure to discuss this with your trainer, especially if the 5-days are split into two sessions or spread out to a 10-day training.

## Day 1

Objectives	Duration	Audience
<p><b>Setup</b></p> <p>Your instructor will need some time to setup and check access to your uProduce server, printers, etc. Please refer to <a href="#">Required facilities and equipment</a>.</p>	.5 - 1 hour Before training starts.	Instructor, training coordinator and/or network administrator
<p><b>Module 1 - Introduction and overview</b></p> <p>This introductory module is an overview of XMPie and our multi-channel marketing capabilities. The purpose of this module is to introduce PersonalEffect Full Suite, show what can be done with the product, and review the agenda for training.</p> <p><b>Performance Objectives:</b></p> <p>At the completion of this training, the trainee will be able to:</p> <ul style="list-style-type: none"> <li>● Understand what will be covered during training and what XMPie products were purchased.</li> <li>● Discuss industry terminology.</li> <li>● Describe XMPie (product) workflows.</li> <li>● Understand the basics of ADOR technology.</li> <li>● Explain what is VDP and how it is different than mail merge.</li> <li>● Explain how VDP can be used in a Web-to-Print workflow.</li> <li>● Explain what is Transmedia/XM campaigns and how those are different than VDP campaigns.</li> <li>● Distribute and review the tutorial files.</li> </ul>	1 - 1.5 hours.	Everyone is invited to this presentation.

Objectives	Duration	Audience
<p><b>Module 2 - Basic print campaign</b></p> <p>This module is an introduction or review (based on pre-training tutorials completion) using InDesign and uCreate Print, to complete a basic Variable Data Print (VDP) document.</p> <p><b>Performance Objectives:</b></p> <p>At the completion of this training, the trainee will be able to:</p> <ul style="list-style-type: none"> <li>● Assess campaign goals (briefing) and prepare materials.</li> <li>● Describe and use the XMPie uCreate Print panel.</li> <li>● Complete a VDP campaign from start to finish within the InDesign application. <ul style="list-style-type: none"> <li>» Understand how ADOR values are based on the linked data and business rules.</li> <li>» Use the Rule Editor; create/modify various ADORs and types.</li> <li>» Create (plan) variables to be used as user input fields.</li> <li>» Tag the template by placing ADORs into the design file.</li> <li>» Use QLingo functions within the Rule Editor.</li> <li>» Set assets source location and use common features.</li> <li>» Explain how transparency and other features affects print performance.</li> <li>» Discuss and/or generate dynamic print output using connection to data source on local computer.</li> </ul> </li> <li>● Discuss designing for XLIM production using XLIM preflight panel and understand the benefits.</li> <li>● Understand the different types of XMPie Packages and export a Campaign package (cpkg) from uCreate Print.</li> <li>● Understand or use the connectivity feature that allows saving to and/or opening document from the uProduce.</li> </ul>	<p>4 - 6 hours</p>	<p><b>Mandatory:</b></p> <ul style="list-style-type: none"> <li>● Print designers who will create document templates.</li> </ul> <p><b>Desirable:</b></p> <ul style="list-style-type: none"> <li>● Database users who work with data sources and build the business logic-based campaign requirements.</li> <li>● Marketing or business managers who set the rules for changing the document design based on data values,</li> <li>● Programmers who intend to use the uProduce API to develop custom applications (if applicable).</li> </ul>



Objectives	Duration	Audience
<p><b>Module 3 - Print production on the uProduce server</b></p> <p>In this module, we introduce the uProduce production server and the concept of importing/exporting document and campaign packages. Also, we will discuss the print production differences between desktop (from within InDesign) vs uProduce server.</p> <p><b>Performance Objectives:</b></p> <p>At the completion of this training, the trainee will be able to:</p> <ul style="list-style-type: none"> <li>● Describe and use the uProduce Dashboard.</li> <li>● Create new users and review other administrative tasks (Administrators only).</li> <li>● Create new Account and Campaign containers and modify their properties (as needed).</li> <li>● Upload campaign components using XMPie packages and/or individual component files.</li> <li>● Discuss data conversion for flat data sources.</li> <li>● Replace components that have been modified.</li> <li>● Create and use destinations; review other settings.</li> <li>● Discuss and use the print output features and options for various output formats.</li> <li>● Generate print proof and final print PDF production using XLIM or XLIM &amp; InDesign engines.</li> </ul>	<p>2 hours</p>	<p>Mandatory:</p> <ul style="list-style-type: none"> <li>● Print Designers who will create document templates;</li> <li>● Production managers who will process and print output files.</li> </ul> <p>Desirable:</p> <ul style="list-style-type: none"> <li>● Programmers who intend to use the PersonalEffect API to develop custom applications (if applicable).</li> </ul>
<p><b>Exercises</b></p> <p>Any remaining time in Day 1 can be used to explore customer-specific project, additional exercises or objectives.</p>		

## Day 2

Objectives	Duration	Audience
<p><b>Module 4 - uStore introduction and walk-through</b></p> <p>In this module, the uStore customer interface is presented as a walk-through demonstration. Attendees are encouraged to follow along if time permits. Concepts, terminology and workflows are discussed.</p> <p><b>Performance Objectives:</b></p> <p>At the completion of this training, the trainee will be able to:</p> <ul style="list-style-type: none"> <li>● Discuss how different store types are used to control log in and browsing options.</li> <li>● Login as a customer using a completed store front (housed on either on your own system or a training server).</li> <li>● Understand the customer experience searching for and ordering different product types.</li> <li>● Discuss requirements for stores, product types, prepress, and other requirements to implement a e-commerce site.</li> </ul>	2 hours	Everyone is invited to this presentation as it overviews the customer experience and the basics of creating an online stores.
<p><b>Module 5 - uStore back office intro (startup tasks)</b></p> <p>In this module, we consider the settings within the back office that are required for creating and managing all stores and the uStore interface.</p> <p><b>Performance Objectives:</b></p> <p>At the completion of this training, the trainee will be able to:</p> <ul style="list-style-type: none"> <li>● Short review of uProduce administrative screens, to create uProduce users to use with uStore and understand why this step is necessary.</li> <li>● Setup uProduce delivery providers (as needed).</li> <li>● Login to the uStore, to create super users, used during training and store setups. (Detailing user roles will be covered later.)</li> <li>● Implement and configure startup presets:               <ul style="list-style-type: none"> <li>» Discuss and/or implement the admin language and localization.</li> <li>» Review some of the global product properties.</li> <li>» Add the uProduce users to be used for store setups.</li> </ul> </li> </ul>	1 hours	<p><b>Mandatory:</b></p> <ul style="list-style-type: none"> <li>● Those implementing and managing stores and products</li> </ul> <p><b>Desirable:</b></p> <ul style="list-style-type: none"> <li>● Programmers who intend to use uStore APIs to develop custom applications (if applicable).</li> </ul>

Objectives	Duration	Audience
<p><b>Module 6 - Basic store startup</b></p> <p>This module covers the basics for creating stores and adding static products, pricing, properties and handling orders.</p> <p><b>Performance Objectives:</b></p> <p>At the completion of this training, the trainee will be able to:</p> <ul style="list-style-type: none"> <li>● Create new stores; configure and modify store setup. <ul style="list-style-type: none"> <li>» Review and set the options required for a new store (clearing, delivery, skins, help documents, etc.).</li> <li>» Discuss how friendly URLs are implemented.</li> <li>» Understand how to implement simple skinning choices.</li> <li>» Understand localization and other language settings.</li> </ul> </li> <li>● Create and modify various static store products. <ul style="list-style-type: none"> <li>» Understand the differences between store products and how they are configured.</li> <li>» Discuss and implement product properties, pricing, prepress and other product options.</li> <li>» Test products and understand how to address setup changes.</li> <li>» Duplicate products to change settings or pricing.</li> </ul> </li> <li>● Create and modify Product Profiles</li> <li>● Create an uploadable product, using the default preview campaign including pricing and properties.</li> <li>● (complete on Day 2, if needed)</li> </ul>	4 - 5 hours	<p>Mandatory:</p> <ul style="list-style-type: none"> <li>● Those implementing and managing stores and products</li> </ul> <p>Desirable:</p> <ul style="list-style-type: none"> <li>● Marketing or business managers who set the rules for changing the document design based on data values,</li> <li>● Programmers who intend to use APIs to develop custom applications (if applicable).</li> </ul>
<p><b>Module 7 - Testing products and processing orders</b></p> <p>Any exercises or tasks remaining from Day 1 will be completed before moving to module 4.</p> <p><b>Performance Objectives:</b></p> <p>At the completion of this training, the trainee will be able to:</p> <ul style="list-style-type: none"> <li>● Test and order products created in previous modules.</li> <li>● Review order queues and how orders flow.</li> <li>● Process orders for production and understand how triggers can automate this process.</li> </ul>	1 hour	<p>Mandatory:</p> <ul style="list-style-type: none"> <li>● Those implementing and managing stores and products</li> </ul>

Objectives	Duration	Audience
<p><b>Module 8 - Other uStore back office tasks</b></p> <p>In this module, we consider the settings within the back office that are required for managing stores, orders, and users.</p> <p><b>Performance Objectives:</b></p> <p>At the completion of this training, the trainee will be able to:</p> <ul style="list-style-type: none"> <li>● Create users, user groups and group permissions.</li> <li>● Implement user group permissions for product groups.</li> <li>● Discuss and implement order approval setup.</li> <li>● Implement and configure some basic global presets: <ul style="list-style-type: none"> <li>» Generate coupons discounts for a given store.</li> <li>» Discuss clearing methods.</li> <li>» Modify a Global Product Properties.</li> <li>» Discuss implementation of external databases.</li> <li>» Discuss templates used for messaging.</li> </ul> </li> <li>● Implement basic localization, language, taxes and other global/store settings. (if needed or not covered previously)</li> <li>● Implement and use Product Profiles (if needed).</li> <li>● Review Triggers to automate processing of orders/emails.</li> <li>● Generate predefined reports.</li> </ul>	2 - 3 hours	<p>Mandatory:</p> <ul style="list-style-type: none"> <li>● Those implementing and managing uStore stores and products</li> </ul> <p>Desirable:</p> <ul style="list-style-type: none"> <li>● Marketing or business managers who set the rules for changing the document design based on data values,</li> <li>● Programmers who intend to use APIs to develop custom applications (if applicable)</li> </ul>
<p><b>Module 9 - Dynamic web-to-print product overview</b></p> <p>Before adding dynamic products to a store, participants need to understand how dynamic templates are created, and review requirements for a print and web-to-print campaigns.</p> <p><b>Performance Objectives:</b></p> <p>At the completion of this training, the trainee will be able to:</p> <ul style="list-style-type: none"> <li>● Assess campaign goals (briefing) and prepare materials.</li> <li>● Discuss differences between print campaigns and web-to-print campaigns.</li> <li>● Understand what are business rules and where they are implemented, at the document level (data and rules) or at the store level (input validation).</li> <li>● Gather resources for the next module (creating a dynamic print piece to be used for web-to-print products).</li> </ul>	~1 hours	<p>Mandatory:</p> <ul style="list-style-type: none"> <li>● Those implementing and managing uStore stores and products</li> <li>● Print designers who will create document templates.</li> </ul> <p>Desirable:</p> <ul style="list-style-type: none"> <li>● Marketing or business managers who set the rules for changing the document design based on data values,</li> <li>● Programmers who intend to use APIs to develop custom applications (if applicable).</li> </ul>

## Day 3

Objectives	Duration	Audience
<p><b>Module 10 - Basic VDP-W2P campaigns (part 1 - template creation)</b></p> <p>In this module participants will create a W2P template.</p> <p>The product will be determined by the instructor and trainees, it will likely be either a customized postcard/letter with uploaded recipient list or fully customized business card.</p> <p><b>Performance Objectives:</b></p> <p>At the completion of this training, the trainee will be able to:</p> <ul style="list-style-type: none"> <li>● Replicating the methods used in module 2, create a dynamic template.</li> <li>● Discuss campaign dial types and add those to the campaign for product customization in uStore.</li> <li>● Discuss designing for uEdit customization and how that works with and differs from XLIM functionality.</li> <li>● Package the template and place on uProduce or use the connectivity to save to uProduce.</li> <li>● Prepare the template for uStore, by running a proof and print process in uProduce (or from the uCreate Dynamic Print screen while connected to uProduce).</li> </ul>	<p>2 hours</p>	<p><b>Mandatory:</b></p> <ul style="list-style-type: none"> <li>● Those implementing and managing uStore stores and products</li> <li>● Print designers who will create document templates.</li> </ul> <p><b>Desirable:</b></p> <ul style="list-style-type: none"> <li>● Marketing or business managers who set the rules for changing the document design based on data values,</li> <li>● Programmers who intend to use APIs to develop custom applications (if applicable).</li> </ul>

Objectives	Duration	Audience
<p><b>Module 11 - Basic VDP-W2P campaigns (part 2 - product setup)</b></p> <p>In this module participants add dynamic products to their stores.</p> <p><b>Performance Objectives:</b></p> <p>At the completion of this training, the trainee will be able to:</p> <ul style="list-style-type: none"> <li>● Create dynamic store products. <ul style="list-style-type: none"> <li>» If needed, prepare dynamic document templates for implementation as dynamic products (proof/process on uProduce).</li> <li>» Review campaign dials and how those are used to customize orders.</li> <li>» Review and configure customization options, input types and validation methods</li> <li>» Discuss how data sources could be used for pre-population of campaign dials.</li> <li>» Review uEdit setup for XLIM templates.</li> <li>» Implement product properties, pricing, prepress and other product options.</li> </ul> </li> <li>● Test new products and place orders. <i>If templates or their rules needed to be modified, we will do that step in the next module. For now, modifications are only made within the product customization setup.</i></li> <li>● Review and process incoming orders.</li> </ul>	<p>1-1.5 hours</p>	<p><b>Mandatory:</b></p> <ul style="list-style-type: none"> <li>● Those implementing and managing uStore stores and products</li> <li>● Print Designers who will create document templates.</li> </ul> <p><b>Desirable:</b></p> <ul style="list-style-type: none"> <li>● Database users; those who work with data sources and build the business logic based campaign requirements.</li> <li>● Marketing or business managers who set the rules for changing the document design based on data values,</li> <li>● Programmers who intend to use APIs to develop custom applications (if applicable).</li> </ul>

Objectives	Duration	Audience
<p><b>Module 12- Making changes to VDP-W2P product</b></p> <p>Often once a product is online, the client will request changes, this module introduces modifying a product's logic and/or design, and how to the best to update those products.</p> <p>Based on your configuration, the instructor will teach one of the methods below (and may if time allows, demo the other).</p> <p>Method 1 is best for print only campaigns and Methods 2 is best in collaborative campaign-building environment.</p> <p><b>Method 1: Using uCreate Print/Designer</b></p> <p><b>Performance Objectives for Method 1</b></p> <p>At the completion of this training, the trainee will be able to:</p> <ul style="list-style-type: none"> <li>● Open the document from uProduce (if applicable).</li> <li>● Modify the business rules (as needed).</li> <li>● Create plan variables and use these with ADORs, as needed.</li> <li>● Save to uProduce (if opened from) or discuss methods of updating files on uProduce based changes made.</li> </ul> <p><b>Method 2: Using uPlan (optional, limited)</b></p> <p>By using uPlan, you can separate campaign logic and creative design. uPlan also provides additional functionality that cannot be achieved with the uCreate Print's Rule Editor.</p> <p><b>Performance Objectives for Method 2</b></p> <p>At the completion of this training, the trainee will be able to:</p> <ul style="list-style-type: none"> <li>● Modify existing plan files (as needed).</li> <li>● Create plan variables and use these with ADORs, as needed.</li> <li>● Modify and use common QLingo functions.</li> <li>● Generate and view multiple (ADOR) proof sets.</li> <li>● Link the plan and proof set(s) to the design templates.</li> </ul> <p><b>Both Methods require updating changes:</b></p> <ul style="list-style-type: none"> <li>» Updating the components on uProduce, and prepping for uStore</li> <li>» Refreshing the cache and making adjustments in uStore, then testing changes in the store.</li> </ul>	<p>2-4 hours</p>	<p>Mandatory:</p> <ul style="list-style-type: none"> <li>● Those implementing and managing uStore stores and products</li> <li>● Database users; those who work with data sources and build the business logic based campaign requirements.</li> <li>● Print Designers who will create document templates.</li> </ul> <p>Desirable:</p> <ul style="list-style-type: none"> <li>● Marketing or business managers who set the rules for changing the document design based on data values,</li> <li>● Programmers who intend to use the PersonalEffect API to develop custom applications (if applicable).</li> </ul>

## Day 4

Objectives	Duration	Audience
<p><b>Module 13 - Campaign planning and resource setup</b></p> <p>Creating a cross-media campaign requires planning and storyboarding, this module covers those concepts and tasks.</p> <p><b>Performance Objectives:</b></p> <p>At the completion of this training, the trainee will be able to:</p> <ul style="list-style-type: none"> <li>● Assess campaign goals (briefing) and prepare materials.</li> <li>● Use Circle to create a new project:               <ul style="list-style-type: none"> <li>» Opening, saving and creating projects.</li> <li>» Understand and use the different nodes (touchpoints, enhancers and actions) to storyboard a campaign.</li> <li>» Understanding the differences between projects and flow patterns.</li> <li>» Review the Circle Library.</li> <li>» Understand ways to share projects.</li> </ul> </li> <li>● Setup campaign for reviewers (if applicable)               <ul style="list-style-type: none"> <li>» Add design mockups for campaign reviewers</li> <li>» Invite reviewers and other collaborators</li> <li>» Post and read comments</li> </ul> </li> <li>● Analyze and adjust campaign resources, based on goals and requirements:               <ul style="list-style-type: none"> <li>» Review touchpoints, list the required ADORs and their business rules.</li> <li>» Review and adjust the data source to accommodate data capturing needs.</li> <li>» Review templates (print, web, email) and assets.</li> </ul> </li> </ul>	<p>1-2 hours.</p>	<p>Mandatory:</p> <ul style="list-style-type: none"> <li>● Print designers and/or Web designers who will create the personalized web sites.</li> </ul> <p>Desirable:</p> <ul style="list-style-type: none"> <li>● Marketing or business managers who set the rules for changing the document design based on data values.</li> </ul>



Objectives	Duration	Audience
<p><b>Module 14 - Creating the campaign logic</b></p> <p>There are a few methods for creating cross-media campaign logic and each have different workflows in the beginning, then similar workflows toward completion.</p> <p>It is our recommendation to use Method 1 (uPlan) for any type of cross-media campaign, however when uPlan is not available, you will start a campaign using Method 2 (CPKG from InDesign).</p> <p>Only one method will be taught at this time, but other methods can be discussed and/or demonstrated, if time allows.</p> <p><b>Performance Objectives:</b></p> <p>At the completion of this training, the trainee will be able to:</p> <p><b>Method 1: Using uPlan (logic) and Circle (build)</b></p> <ul style="list-style-type: none"> <li>● Use uPlan (requires Windows) <ul style="list-style-type: none"> <li>» Describe and use the uPlan wizard and application interface.</li> <li>» Create new and modify existing plan files.</li> <li>» Create various ADORs and script their QLingo expressions.</li> <li>» Create and use (plan) variables and audiences features.</li> <li>» Save the plan and generate proofsets.</li> </ul> </li> <li>● Using Circle to build initial campaign project components <ul style="list-style-type: none"> <li>» Connect Circle project to uProduce</li> <li>» Upload the plan file, campaign data, and assets</li> <li>» Set sample recipients</li> </ul> </li> <li>● Connecting a print document to the campaign, tagging and saving the template.</li> <li>● Reviewing the touch points.</li> </ul> <p><b>Method 2: Using a Circle (build) to upload a CPKG</b></p> <ul style="list-style-type: none"> <li>● Using the sample procedures as Module 2, create the logic and tag a print template for the campaign.</li> <li>● Using Circle to build initial campaign project components <ul style="list-style-type: none"> <li>» Connect Circle project to uProduce</li> <li>» Upload the CPKG to Circle project.</li> <li>» Set sample recipients</li> </ul> </li> <li>● Reviewing the touch points.</li> </ul>	<p>2-4 hours</p>	<p>Mandatory:</p> <ul style="list-style-type: none"> <li>● Print designers and/or Web designers who will create the personalized web sites.</li> </ul> <p>Desirable:</p> <ul style="list-style-type: none"> <li>● Database users who work with data sources and build the business logic-based campaign requirements.</li> <li>● Marketing or business managers who set the rules for changing the document design based on data values and map out the flow of the campaign.</li> </ul>

## Day 5

PersonalEffect TransMedia implements an XMPL server (part of our Open XM technology) which allows web designers and developers to use any software and their own sites to host personalized pages. During these modules, the trainer will use Dreamweaver and the uCreate Digital panels to develop personalized emails and websites while introducing the concepts and requirements of our cross-media workflow.

It is preferred that participants use Dreamweaver and uCreate Digital, however, if the participants wishes to use another HTML editor, to hand-code scripts and ADORs codes, they may. Be aware, that the instructor cannot be responsible for troubleshooting this code during training.

For more information for developing personalized sites in conjunction with the XMPL server. Use the links to XMPie Campus and the XMPieLab (on GitHub) provided within the [XMPie Sites](#) section.

Activity	Duration	Audience
<p><b>Module 15 - Creating email documents</b></p> <p>This module will look at setting up the email documents and activities for the cross-media campaign stated in Session 2.</p> <p><b>Performance Objectives:</b></p> <p>At the completion of this training, the trainee will be able to:</p> <ul style="list-style-type: none"> <li>● Using Circle, setup the email touchpoints (header, mailing list, and settings)</li> <li>● Describe and use different methods to create and modify the email body text connected to the email touchpoint(s) within the Circle Library.               <ul style="list-style-type: none"> <li>» Use the online email editor through Circle                   <ul style="list-style-type: none"> <li>● Upload HTML and related files (zipped)</li> <li>● Use the online email editor to place ADORs</li> </ul> </li> <li>» Use uCreate Digital: Email panel within Dreamweaver                   <ul style="list-style-type: none"> <li>● Create a new email and link to the project</li> <li>● Linking the email to the touchpoint</li> </ul> </li> <li>» Repeat the process (if time allows) to create an email on your own using either method.</li> <li>» Understand the different workflows for file management based on the method used to create the email.</li> </ul> </li> <li>● Describe the differences between Mass email and Triggered email setups.</li> </ul>	<p>2 hours</p>	<p>Mandatory:</p> <ul style="list-style-type: none"> <li>● Print designers and/ or Web designers who will create the personalized web sites.</li> </ul> <p>Desirable:</p> <ul style="list-style-type: none"> <li>● Marketing or business managers who set the rules for changing the document design based on data values</li> <li>● Web Developers that will be implementing designs outside of XMPie environment.</li> </ul>

Activity	Duration	Audience
<p><b>Module 16 - Creating the personal website</b></p> <p>This module will take the participants through setting up a personalized website using Dreamweaver and the uCreate Digital:Web panel.</p> <p><b>Performance Objectives:</b></p> <p>At the completion of this training, the trainee will be able to:</p> <ul style="list-style-type: none"> <li>● Link to the Circle project.</li> <li>● Use Dreamweaver site management (configure setting as needed).</li> <li>● Setup personalized pages including the landing and thank you pages.</li> <li>● Setup and configure web forms to update data and/or adding new records (eg refer-a-friend).</li> <li>● Discuss and implement friendly URLs (if possible)</li> <li>● Configure tracking and other touch point options.</li> <li>● Test new sites using sample recipients.</li> </ul>	3 hours	<p><b>Mandatory:</b></p> <ul style="list-style-type: none"> <li>● Print designers and/or Web designers who will create the personalized web sites.</li> </ul> <p><b>Desirable:</b></p> <ul style="list-style-type: none"> <li>● Marketing or business managers who set the rules for changing the document design based on data values.</li> <li>● Web Developers that will be implementing designs outside of XMPie environment.</li> </ul>
<p><b>Module 17 -Printing from Circle</b></p> <p>This modules covers how to configure and print a document from within a Circle project.</p> <p><b>Performance Objectives:</b></p> <p>At the completion of this training, the trainee will be able to:</p> <ul style="list-style-type: none"> <li>● Generate output for a given document, as needed.</li> <li>● Schedule print documents for later production.</li> <li>● Discuss onDemand PDF documents* (if time allows, the instructor can demo this function, and explain how this print template is different than the other)</li> </ul>	.5 - 1 hour	<p><b>Mandatory:</b></p> <ul style="list-style-type: none"> <li>● Print Designers who will create document templates;</li> <li>● Production managers who will process and print output files.</li> </ul> <p><b>Desirable:</b></p> <ul style="list-style-type: none"> <li>● Programmers who intend to use the PersonalEffect API to develop custom applications (if applicable).</li> </ul>

Activity	Duration	Audience
<p><b>Module 18 -Marketing Console</b></p> <p>During a cross-media campaign, we track web page hits, and detailed information for each recipient. That information is then returned as reports (such as open emails). This module covers creating generating report and charts which can be added to the Circle project.</p> <p><b>Performance Objectives:</b></p> <p>At the completion of this training, the trainee will be able to:</p> <ul style="list-style-type: none"> <li>● Describe and use the Marketing Console interface.</li> <li>● Discuss administrative tasks and service levels.</li> <li>● Discuss user roles.</li> <li>● Use the pre-built tracking reports for print and web.</li> <li>● Create, customize and save reports as charts and/or lists.</li> <li>● Add charts to and arrange the dashboard.</li> <li>● Add charts to the touchpoints in Circle.</li> </ul>	<p>2 hours</p>	<p>Mandatory:</p> <ul style="list-style-type: none"> <li>● Print designers and/ or Web designers who will create the personalized web sites.</li> </ul> <p>Desirable:</p> <ul style="list-style-type: none"> <li>● Marketing or business managers who request the campaign's marketing information and goals..</li> </ul>

# Optional Training

## Optional modules

The following modules are optional and can be given on Day 5, depending on the products purchased, and the available time: Decide with your instructor, preferably on Day 4 which modules, if any, could be provided. It is highly recommended to purchase additional training as needed for topics not covered during the initial training.

Optional Objectives	Duration	Audience
<p><b>Module 19 - Intermediate campaign objects/logic</b></p> <ul style="list-style-type: none"> <li>● Understand the differences between recipient data and additional data sources.</li> <li>● Use two data sources to create a dynamic table using uCreate Print.</li> <li>● Discuss and/or use uCreate to run proof and print production generated from uProduce.</li> <li>● Discuss and/or use Circle to run proof and print production (if this workflow applies to the trainees).</li> <li>● Repeat Module 14 using the alternative method (if app).</li> <li>● Advanced uPlan (if app):               <ul style="list-style-type: none"> <li>» Describe and use the uPlan wizard and application GUI.</li> <li>» Create a new plan.</li> <li>» Understand, and create recipient data filters.</li> <li>» Use additional data sources with plan User Views.</li> <li>» Create ADOR tables, or Text ADORs using User Views.</li> <li>» Create and use a user-defined plan Function.</li> </ul> </li> </ul>	<p>1 - 4 hours</p>	<p>Mandatory:</p> <ul style="list-style-type: none"> <li>● Print Designers who will create document templates.</li> <li>● Database users who work with data sources and build the business logic-based campaign requirements.</li> </ul> <p>Desirable:</p> <ul style="list-style-type: none"> <li>● Marketing or business managers who set the rules for changing the document design based on data values, and/or</li> <li>● Programmers who intend to use the PersonalEffect API to develop custom applications (if applicable).</li> </ul>

Optional Objectives	Duration	Audience
<p><b>Module 20 - Advanced print production options</b></p> <p>This module allows for more practice within the uProduce dashboard.</p> <p><b>Performance Objectives:</b> At the completion of this training, the trainee will be able to:</p> <ul style="list-style-type: none"> <li>● Generate other types of print output formats.</li> <li>● Filter data records for specific output using data queries.</li> <li>● Process a campaign that uses more than one data source for output.</li> <li>● Review administrative screens and configure output settings.</li> </ul>	1 hours	<p><b>Mandatory:</b></p> <ul style="list-style-type: none"> <li>● Print Designers who will create document templates;</li> <li>● Production managers who will process and print output files.</li> </ul> <p><b>Desirable:</b></p> <ul style="list-style-type: none"> <li>● Programmers who intend to use the PersonalEffect API to develop custom applications (if applicable).</li> </ul>
<p><b>Module 21 - Adding lead acquisition to campaign</b></p> <p>Transmedia campaigns can benefit from having a non-personalized site for users to register themselves, and thus be added to the personalized campaign. This module discusses that functionality and implements a simple addition to the campaign.</p> <p><b>Performance Objectives:</b> At the completion of this training, the trainee will be able to:</p> <ul style="list-style-type: none"> <li>● Create a self-registration page and form.</li> <li>● Set up a triggered email.</li> <li>● Add twitter and facebook buttons.</li> </ul>	1 - 2 hours	<p><b>Mandatory:</b></p> <ul style="list-style-type: none"> <li>● Print designers and/or Web designers who will create the personalized web sites.</li> </ul> <p><b>Desirable:</b></p> <ul style="list-style-type: none"> <li>● Database users who work with data sources and build the business logic-based campaign requirements.</li> <li>● Marketing or business managers who set the rules for changing the document design based on data values.</li> <li>● Web Developers that will be implementing designs outside of XMPie environment.</li> </ul>

Optional Objectives	Duration	Audience
<p><b>Module 22 - ulmage Introduction</b></p> <p>This module covers the basics of using ulmage for personalizing Adobe Photoshop images as part of the campaign.</p> <p><b>Performance Objectives:</b> At the completion of this training, the trainee will be able to:</p> <ul style="list-style-type: none"> <li>● Create a font-based Photoshop ulmage package.</li> <li>● Use the ulmage package with the uCreate Print Rule Editor to create a Graphic ADOR.</li> <li>● Tag an InDesign document with the new Graphic ADOR, preview and/or use Dynamic Print to view samples.</li> </ul> <p><b>Advanced Objectives (as needed and if time permits):</b></p> <ul style="list-style-type: none"> <li>● Create a “Separated Letters” ulmage package.</li> <li>● View a demonstration of an “Image Font” template from the XMPie Marketplace, and review steps to update the template (as needed).</li> <li>● Modify a Graphic ADOR expression to use ulmage templates using uPlan.</li> <li>● Compare the differences between working with ulmage packages and templates.</li> <li>● Upload and use the designs (InDesign &amp; ulmage) on the uProduce server for production or generate ulmage output from desktop to use as assets on server (if server module wasn't purchased).</li> </ul>	<p>1 – 3 hours based on trainee's experience.</p>	<p>Mandatory:</p> <ul style="list-style-type: none"> <li>● Print Designers who will create document templates;</li> <li>● Photoshop designers who will create the ulmage templates.</li> </ul>
<p><b>Module 23 - uChart introduction</b></p> <p>Participants will learn how to create a Table ADOR, how to place and style the table in InDesign and how to convert the table of data into a chart for use in print campaigns.</p> <p><b>Performance Objectives:</b> At the completion of this training, the trainee will be able to:</p> <ul style="list-style-type: none"> <li>● Generate a Table ADOR using a User View linked to additional data within uPlan or linked to second data table using the Rule Editor.</li> <li>● Use the Table ADOR to create dynamic InDesign tables.</li> <li>● Discuss mold rows, auto-flow, suppress empty tables.</li> <li>● Place the Table ADOR into a graphic box to create a dynamic chart.</li> <li>● Use the uChart interface to configure the chart.</li> </ul>	<p>1 – 3 hours depending on the amount of time used for hands-on practice.</p>	<p>Mandatory:</p> <ul style="list-style-type: none"> <li>● Print Designers who will create document templates.</li> </ul> <p>Desirable:</p> <ul style="list-style-type: none"> <li>● Marketing or business managers who set the rules for changing the document design based on data values.</li> </ul>

Optional Objectives	Duration	Audience
<p data-bbox="152 197 961 233"><b>Module 21 - High-level overview of web service APIs</b></p> <p data-bbox="152 258 911 373">uProduce includes a powerful Application Programming Interface (API) which can be used to set up automation or to integrate other web-based applications.</p> <p data-bbox="152 390 472 422"><b>Performance Objectives:</b></p> <p data-bbox="152 432 911 464">At the completion of this training, the trainee will be able to:</p> <ul data-bbox="152 474 943 674" style="list-style-type: none"> <li data-bbox="152 474 943 590">● Discuss how the APIs can be used for automation or with external web-based applications (e.g. e-commerce, Request Site) to produce print proofs and run production.</li> <li data-bbox="152 600 878 674">● Locate and discuss the API documentation and sample walkthroughs.</li> </ul>	<p data-bbox="980 197 1089 228">~ 1 hour</p>	<p data-bbox="1175 197 1328 228"><b>Mandatory:</b></p> <ul data-bbox="1175 239 1455 443" style="list-style-type: none"> <li data-bbox="1175 239 1455 443">● Programmers who intend to use the PersonalEffect API to develop custom applications.</li> </ul> <p data-bbox="1175 464 1308 495"><b>Desirable:</b></p> <ul data-bbox="1175 506 1455 789" style="list-style-type: none"> <li data-bbox="1175 506 1455 789">● Marketing or business managers who set the rules for changing the document design based on data values.</li> </ul>



# Additional courses from XMPie

XMPie offers a number of standard courses including both online and onsite training courses.

## Onsite courses

✓ Included
⊙ Included with Pro version
○ Optional*
‡ Split over two sessions

		PE Variable Data Print Training	PE TransMedia Training	PE Web-to-Print Training	PE Full Suite Introduction	PE Full Suite Advanced
Duration (days)		2.5	4	4†	5	10‡
Course Modules	Introduction and overview	✓	✓	✓	✓	✓
	Basic print campaign	✓	✓	✓	✓	✓
	Print production on the uProduce server	✓	✓	✓	✓	✓
	Print campaign with uPlan and advanced features	⊙	✓	⊙	✓	✓
	Using Circle and creating personalized websites and emails		✓		✓	✓
	uStore - web to print and online print portals			✓	✓	✓
	Marketing campaign tracking and analysis		✓		✓	✓
	ulmage introduction	○	✓	○	✓	✓
	uChart introduction	○	○	○	✓	✓
	High-level overview of API web services	○	○	○	○	✓
	Advanced uPlan and campaign features	○	○	○	○	✓
	ulmage advanced	○	○	○	○	✓

\* Additional training time may need to be purchased, if optional items are required. Please work with your sales/presales, and/or trainers to determine how much time and the best delivery method of those topics.

† PE Web-to-Print Training can be given as a 4-, or when necessary, a 3-day training course. Topics and/or time allocated to cover required topics will be reduced to fit the purchased time.

‡ For the Advanced PersonalEffect Full Suite Training, it is recommended that the training is delivered in two sessions with at least 2 to 4 weeks in between the two sessions. This break is designed to give participants an opportunity for more hands-on time with the software, and to start creating campaigns/stores for your company and customers. This means that the second half of training can focus on advanced topics and projects which relate directly to your organization.

## Online courses

- uDirect Classic (1 x 3 hour)
- uDirect Studio (2 x 3 hour)
- uDirect Video (1 x 3 hour)
- PersonalEffect e-Media Cloud (3 x 3 hour - uDirect knowledge is a prerequisite)
- Introduction to XMPie APIs (1 x 3 hour)

## Custom courses

In addition to the standard courses listed above, XMPie can deliver custom training tailored to your specific needs. Custom training is available from introductory to advanced levels and can even be used to fast-track your first campaign or store setup. Typically, API programming and custom application development are taught via custom training so we can focus on the specific programming language and project you have in mind.

The lead time needed for custom training is a little longer while we prepare the Statement of Work, agenda, and materials needed. Please contact one of our training professionals or sales consultants for more information.

## Further information

For more information about XMPie Training courses, please contact:

- Your XMPie Reseller or Account Manager
- Or, email:
  - [trainingNA@xmpie.com](mailto:trainingNA@xmpie.com) - for North American enquiries
  - [trainingROW@xmpie.com](mailto:trainingROW@xmpie.com) - for enquiries from other regions

# XMPie Sites

## About and more...

- » <http://www.xmpie.com> - XMPie website has case studies, product brochures, and links to our other sites.
- » <http://blog.xmpie.com> - Articles and news from XMPie.
- » <http://twitter.com/xmpie> - Follow us on Twitter.
- » <http://www.facebook.com/xmpie> - Follow on Facebook. Our page includes a demo using our uStore's Facebook Connect application.
- » <https://www.linkedin.com/company/xmpie> - Follow us on LinkedIn.
- » <https://www.youtube.com/user/xmpie> - Our YouTube channel includes many brief videos and some sample of personalized videos.

## XMPie Stores...

- » <http://email.services.xmpie.com> - login page to manage your XES account
- » <http://circle.store.xmpie.com> - to start or upgrade your Circle account (link available through Circle as well)
- » <http://marketplace.xmpie.com> - XMPie Marketplace, where we sell ulmage templates for customers that might need them.

## Circle and Support

- » <http://xmcircle.com/> - XMPie Circle, the link may change, please reference the letter you recieved when you signed up for this service - for free account, write to [special@xmcircle.com](mailto:special@xmcircle.com) for information.
- » <http://www.xmpie.com/support> - XMPie Support Portal (powered by SalesForce) is used for communication between customers and our support teams. You need an active account on this portal to register for the sites below.
  - » <http://campus.xmpie.com> - XMPie Campus, our eLearning and training hub for current XMPie Customers.
  - » <http://info.xmpie.com> - XMPie Information Portal with access to additional case studies, presentations, and much more.
  - » <https://github.com/XMPieLab/XMPL-sdk/wiki> - Home page for the XMPL-SDK, used to add personalization to your HTML pages.

