

PE TransMedia Training

Customer Expectation Document

XMPie PersonalEffect TransMedia

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one to one in one™

A **xerox**  Company



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About this document

The purpose of this document is to set clear expectations and recommendations prior to training in XMPie PersonalEffect® TransMedia. 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. 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: (completed 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

We understand that it is not always possible to take everyone away from their regular routines for 4 days, it is strongly recommended that a small, core group of XMPie software users and a lead attend every day of training.

Each day's hands-on lessons are built on the previous days' training. The core group could be a print designer, a web designer/developer, a database/ mailing list manager, an API programmer (if using system as a platform), and a project manager. See the Agenda for more information on each day's requirements.

The Agenda is flexible and based on needs.

Day 1: Everyone that works with, sells, manages those that do either, or wants to know about XMPie may 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 exercises.

Day 2: 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 3: Those developing cross media campaigns should attend.

Day 4: Those developing cross media campaigns should attend.



About PersonalEffect TransMedia

PersonalEffect TransMedia is designed to create and deploy marketing campaigns across multiple media channels including print, email, and web.

With PersonalEffect TransMedia, you can use personalized print 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.

There are two versions of PersonalEffect TransMedia, it is important to note which software bundle was purchased, as this has some effect on training and workflows.

- ❑ *PersonalEffect TransMedia* (software bundle) includes the following software components: uProduce XEM (XLIM production server), ulmage Photo Processing Unit (for server), Open XM™ with XMPL Server, PE Analytics Signature (tracking) with Marketing Console, first year XES plan (Basic), PersonalEffect Bundled Circle subscription, a single uPlan (logic module) license, a single uCreate Designer (InDesign plug-in) license, and a single uProduce/uCreate connectivity license.
- ❑ *PersonalEffect TransMedia Pro* (software bundle) includes the following software components: uProduce XM (XLIM & InDesign production server), ulmage Photo Processing Unit (for server), Open XM™ with XMPL Server, PE Analytics Signature (tracking) with Marketing Console, first year XES plan (Basic), PersonalEffect Bundled Circle subscription, a single uPlan (logic module) license, a single uCreate Designer (InDesign plug-in) license, a single uCreate Print (InDesign plug-in) license, and three uProduce/uCreate connectivity licenses.

You might be viewing this document if you purchased an enterprise solution which included print and cross-media. It is important to note which software bundle was purchased, as this has some effect on training and workflows.

- ❑ *Enterprise Crossmedia* (software bundle) includes the following software components: uProduce Director XM and Extension servers (XLIM & InDesign production), a single uProduce XM Development server, Open XM™ with XMPL Server, PE Analytics Signature (tracking) with Marketing Console, first year XES plan (Basic) a single uPlan (logic module) license, a single uCreate Print (InDesign plug-in) license, two uCreate Designer (InDesign plug-in) license, and five uProduce/uCreate connectivity licenses.

We suggest that customers with a TransMedia configuration activate their XMPie Circle and XES subscriptions before training starts.

XMPie also sells additional add-on software, some of which is referenced in this document. A table of [additional courses](#) has been provided for customers who have also purchased these items. If you purchased and require training on these optional items, it is recommended to also purchase additional training time so that there is sufficient time to cover these topics.

It is important to note that software bundles change overtime, can be sold with additional modules or licenses, and the above information may not reflect your exact purchase. It is best to check with your sales representative, support team or ask your trainer, if you are not sure.



Course overview

This course is designed to provide introductory training on the latest version of XMPie PersonalEffect TransMedia 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 TransMedia communications and why it is an important tool for today's marketers and service providers. Examples of 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 personalized emails and websites using XMPie tools and Adobe Dreamweaver.

Throughout the course, more advanced topics/features will be discussed and demonstrated, providing a solid grounding on the basics of setting up business rules, creating variable templates for print, web and email, then deploying and measuring the final campaign results.

Duration and delivery method

Four (4) 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.

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 they 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 TransMedia, or where new staff have joined the organization and they have 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 or other HTML editor.
- 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 or staff, who manage the data which will be used for the campaigns.
- Prepress or production staff, who will create the variable data print output from the InDesign document templates using XMPie desktop or server applications.
- 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, and
- 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.
- Create VDP (print) templates using which include a variety of 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.



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.

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.
- Experiment 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 (or similar application) skills

In addition to basic web publishing knowledge, participants should have a working knowledge of Adobe Dreamweaver or similar application before learning our OpenXM technology.

If participants in the web and email components of training do not regularly modify HTML/XHTML or CSS documents, it is recommended they take some time to refresh their knowledge of these technologies before the course.

Specific skills to review:

- Configure a new website and manage files.
- Manage remote site files (e.g. synchronizing, ftp, remote network).
- Create and use various HTML page elements (e.g. header, body, div, img, anchor, ...)
- Create form pages with text, hidden, radio, select and submit form objects.
- Add and editing text, changing fonts via tags and/or css.
- General web page design or layout using CSS or tables. (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 and XMPie uCreate Print 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/RIP software) 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

XMPie's Open XM technology, is based on industry standard HTML and Javascript code snippets, so any HTML editor can be used including Adobe Dreamweaver.

During training, the instructor will typically use Dreamweaver to show the basic concepts of using XMPL to place 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 our platform, as is, to later incorporate our technology with your systems.

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 de-duping.
- 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 or the new **uCreate Print Training** video series.

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.

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 CC2020 (or CC2019), Photoshop CC2020 (or CC2019)
 - Adobe Dreamweaver or similar HTML editing application,
 - XMPie uCreate Print (Professional, Designer or 30-day trial),
 - XMPie ulmage is installed with uCreate Print (runs as trial without a license),
 - XMPie uPlan (on at one or more Windows workstations, licensed or 30-day trial)
 - required only if your configuration includes at least one license or was purchased separately*(more details regarding workstations, network and software follow in this section).*
- ❑ List of URLs and passwords to access the Circle campaign management screens, uProduce dashboard, Marketing Console, web/proxy servers and details for any printer RIP that could be used for testing printed output (i.e. hotfolders' network addresses).

Site	URL	Admin User (if not default)	Password (if not default)
Circle	http://xmcircle.com <i>(ex. http://servername_or_IP/xmpiedashboard)</i>	<i>(ex. name)</i> <i>(ex. admin)</i>	<i>(ex. p@ssw0r4)</i> <i>(ex. admin)</i>
Dashboard	http://		
Marketing Console	<i>(ex. http://servername_or_IP/marketingconsole)</i> http://	<i>(ex. admin)</i>	<i>(ex. admin)</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, if help is needed setting up the connections.

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. (A remote connection to a uPlan/workstation, is acceptable.)

Computers must have Adobe InDesign Creative Cloud 2020 (or 2019), and Photoshop Creative Cloud 2020 (or 2019). Adobe Photoshop is required, only if the ulmage add-on application was purchased. For the purposes of training, it may be 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.

NOTE: Adobe Creative Cloud Suite (desktop) is updated annually to a new version. XMPie software is updated sometime after the release of Adobe's InDesign Server matching version. It is recommended to disable autoupdates and/or not to install a new version of CC without checking with our support team for a compatible version of uCreate Print.

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 purchased and after this period, the trials revert to normal trial functionality. To obtain these temporary licenses, please contact your trainer prior to training.

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 sites are generated or reconfigured 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/trial subscription to XMPie eMail Service (XES). With your license keys, an informational letter with subscription information was sent. If you did receive this letter or coupon, please send a request to support@xmpie.com and they will provide the necessary information.

For more information about this service visit this page. <https://www.xmpie.com/xmpie-email-service/> 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 TransMedia configuration, you are provided a free subscription to Circle, referred to as PersonalEffect/Bundled. You may have purchased an upgraded subscription during your purchase cycle, it is best you review what subscription level you have.

Campaign management (Circle) features are based on your subscription level. For more information about this service and the subscription level features, visit this page. <http://circle.store.xmpie.com>

With your license keys, you will receive an informational letter that includes instructions to activate and complete your registration for this account.

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



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. Also, additional topics may be included where appropriate for the group and when time permits.

Day 1

Objectives	Duration	Audience
<p>Setup</p> <p>Your instructor will need some time to setup and check access to your uProduce server, printers, etc. Please refer to Required facilities and equipment.</p>	.5 – 1 hour Before training starts.	Instructor, training coordinator and/or network administrator
<p>Module 1 - Introduction and overview</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 TransMedia or Enterprise Cross Media, show what can be done with the product, and review the agenda for training.</p> <p>Performance Objectives:</p> <p>At the completion of this training, the trainee will be able to:</p> <ul style="list-style-type: none"> ● Understand what will be covered during training and what XMPie products were purchased. ● Discuss industry terminology. ● Describe XMPie (product) workflows. ● Understand the basics of ADOR technology. ● Explain what is VDP and why do we need it. ● Explain what is Transmedia/XM campaigns and how those are different than VDP campaigns. ● Distribute and review the tutorial files. 	1 – 1.5 hours	Everyone is invited to this presentation.

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

Objectives	Duration	Audience
<p>Module 3 - Print production on the uProduce server</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>Performance Objectives:</p> <p>At the completion of this training, the trainee will be able to:</p> <ul style="list-style-type: none"> ● Describe and use the uProduce Dashboard. ● Create new users and review other administrative tasks. ● Create new Account and Campaign containers and modify their properties. ● Upload campaign components using XMPie packages and/or individual component files. ● Discuss data conversion for flat data sources. ● Replace components that have been modified using the check-out/check-in process. ● Create and use destinations; review other settings. ● Discuss and use the print output features and options for various output formats. ● Generate print proof and final print PDF production using XLIM or XLIM & InDesign engines (depending on product purchased). ● Review how uCreate Connectivity can be used in place of using the uProduce Dashboard. 	<p>2 – 3 hours.</p>	<p>Mandatory:</p> <ul style="list-style-type: none"> ● Print Designers who will create document templates; ● Production managers who will process and print output files. <p>Desirable:</p> <ul style="list-style-type: none"> ● Programmers who intend to use the PersonalEffect API to develop custom applications (if applicable).

Day 2

Objectives	Duration	Audience
<p>Module 4 - Campaign planning and resource setup</p> <p>Creating a cross-media campaign requires planning and storyboarding, this module covers those concepts and tasks.</p> <p>Performance Objectives:</p> <p>At the completion of this training, the trainee will be able to:</p> <ul style="list-style-type: none"> ● Assess campaign goals (briefing) and prepare materials. ● Use Circle to create a new project: <ul style="list-style-type: none"> » Opening, saving and creating projects. » Understand and use the different nodes (touchpoints, enhancers and actions) to storyboard a campaign. » Understanding the differences between projects, templates, instances and flow patterns. » Review the Circle Library. » Understand ways to share projects. ● Setup campaign for reviewers (if applicable) <ul style="list-style-type: none"> » Add design mockups for campaign reviewers. » Invite reviewers and other collaborators. » Post and read comments. ● Analyze and adjust campaign resources, based on goals and requirements: <ul style="list-style-type: none"> » Review touchpoints, list the required ADORs and their business rules. » Review and adjust the data source to accommodate data capturing needs. » Review templates (print, web, email) and assets. 	<p>1-2 hours.</p>	<p>Mandatory:</p> <ul style="list-style-type: none"> ● Print designers and/or Web designers who will create the personalized web sites. <p>Desirable:</p> <ul style="list-style-type: none"> ● 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.

Objectives	Duration	Audience
<p>Module 5 - Creating the campaign logic</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 most types of cross-media campaign. However, uPlan is not always an option, and in order to save time, Method 2 (uCreate) will be used to build the training campaign.</p> <p>If uPlan is a priority, and if time allows, please let the trainer know, so that method is taught instead.</p> <p>Performance Objectives:</p> <p>At the completion of this training, the trainee will be able to:</p> <p>Method 1: Connect with plan (using uPlan)</p> <ul style="list-style-type: none"> ● Use uPlan (requires Windows) <ul style="list-style-type: none"> » Describe and use the uPlan wizard and application interface. » Create new and modify existing plan files. » Create various ADORs and script their QLingo expressions. » Create and use (plan) variables and audiences features. » Save the plan and generate proofsets. ● Using Circle to build initial campaign project components <ul style="list-style-type: none"> » Connect Circle project to uProduce » Upload the plan file, campaign data, and assets » Set sample recipients ● Connecting a print document to the campaign, tagging and saving the template. ● Reviewing the touch points. <p>Method 2: Connect with CPKG (using uCreate)</p> <ul style="list-style-type: none"> ● Using the sample procedures as Module 2, create the logic and tag a print template for the campaign. ● Using Circle to build initial campaign project components <ul style="list-style-type: none"> » Connect Circle project to uProduce » Upload the CPKG to Circle project. » Set sample recipients ● Reviewing the touch points. 	<p>2-4 hours</p>	<p>Mandatory:</p> <ul style="list-style-type: none"> ● Print designers and/or Web designers who will create the personalized web sites. <p>Desirable:</p> <ul style="list-style-type: none"> ● Database users who work with data sources and build the business logic-based campaign requirements. ● 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.

Day 3

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 (or similar application) to develop personalized emails and websites while introducing the concepts and requirements of our cross-media workflow.

Be aware, that the instructor is showing XMPL code, cannot be responsible for troubleshooting all HTML/xHTML and CSS 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>Module 6 - Creating email documents</p> <p>This module will look at setting up the email documents in a few different ways and setting up their related activities.</p> <p>Performance Objectives:</p> <p>At the completion of this training, the trainee will be able to:</p> <ul style="list-style-type: none"> ● Using Circle, setup the email touchpoints (header, mailing list, and settings) ● 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"> » Use the online email editor through Circle <ul style="list-style-type: none"> ● Create a new email using the building tools or upload HTML and related files (zipped) ● Use the online email editor to place ADORs » Use Dreamweaver or similar application <ul style="list-style-type: none"> ● Create a new email and enter XMPL ● Save and upload new email files to touchpoint » Repeat the process (if time allows) to create an email on your own using either method. » Understand the different workflows for file management based on the method used to create the email. ● Describe the differences between Mass email and Triggered email setups. 	<p>2 hours</p>	<p>Mandatory:</p> <ul style="list-style-type: none"> ● Print designers and/ or Web designers who will create the personalized web sites. <p>Desirable:</p> <ul style="list-style-type: none"> ● Marketing or business managers who set the rules for changing the document design based on data values ● Web Developers that will be implementing designs outside of XMPie environment.

Activity	Duration	Audience
<p>Module 7 - Creating the personal website</p> <p>This module will take the participants through setting up a personalized website using Dreamweaver (or similar application) to implement XMPL code.</p> <p>Performance Objectives:</p> <p>At the completion of this training, the trainee will be able to:</p> <ul style="list-style-type: none"> ● Setup site/folder management. ● Find and use HTML5 templates to use for exercise. ● Setup personalized pages including the landing and thank you pages by adding XMPL code. ● Setup and configure web forms to pre-populate forms and update personalized data. ● Discuss and implement friendly URLs (if possible) ● Configure tracking and other touch point options. ● Test new sites using sample recipients. 	4+ hours	<p>Mandatory:</p> <ul style="list-style-type: none"> ● Print designers and/ or Web designers who will create the personalized web sites. <p>Desirable:</p> <ul style="list-style-type: none"> ● Marketing or business managers who set the rules for changing the document design based on data values. ● Web Developers that will be implementing designs outside of XMPie environment.
<p>Module 8 - Printing from Circle</p> <p>This modules covers how to configure and print a document from within a Circle project.</p> <p>Performance Objectives:</p> <p>At the completion of this training, the trainee will be able to:</p> <ul style="list-style-type: none"> ● Generate output for a given document, as needed. ● Schedule print documents for later production. ● Discuss onDemand PDF documents* (if time allows, the instructor can demo this function, and explain how this print template is different than the other) 	.5 - 1 hour	<p>Mandatory:</p> <ul style="list-style-type: none"> ● Print Designers who will create document templates; ● Production managers who will process and print output files. <p>Desirable:</p> <ul style="list-style-type: none"> ● Programmers who intend to use the PersonalEffect API to develop custom applications (if applicable).

Day 4

Objectives	Duration	Audience
<p>Module 9 - Marketing Console</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.</p> <p>This module covers creating generating report and charts which can be added to the Circle project. Email reports are automatically added to Circle touchpoints.</p> <p>Typically this module is taught using examples, and not the campaign built in class, as the new campaign usually doesn't have enough training information built-up for console to display.</p> <p>Performance Objectives:</p> <p>At the completion of this training, the trainee will be able to:</p> <ul style="list-style-type: none"> ● Describe and use the Marketing Console interface. ● Discuss administrative tasks and service levels. ● Discuss user roles. ● Use the pre-built tracking reports for print and web. ● Create, customize and save reports as charts and/or lists. ● Add charts to and arrange the dashboard, as needed. ● Add charts to the touchpoints in Circle. 	<p>2 hours</p>	<p>Mandatory:</p> <ul style="list-style-type: none"> ● Print designers and/or Web designers who will create the personalized web sites. <p>Desirable:</p> <ul style="list-style-type: none"> ● Marketing or business managers who request the campaign's marketing information and goals..

Objectives	Duration	Audience
<p>Module 10 - ulmage Introduction</p> <p>This module covers the basics of using ulmage for personalizing Adobe Photoshop images as part of the campaign.</p> <p>Performance Objectives: At the completion of this training, the trainee will be able to:</p> <ul style="list-style-type: none"> ● Create a font-based Photoshop ulmage package. ● Use the ulmage package with the uCreate Print Rule Editor to create a Graphic ADOR. ● Tag an InDesign document with the new Graphic ADOR, preview and/or use Dynamic Print to view samples. <p>Advanced Objectives (as needed and if time permits):</p> <ul style="list-style-type: none"> ● Create a “Separated Letters” ulmage package. ● View a demonstration of an “Image Font” template from the XMPie Marketplace, and review steps to update the template (if needed). ● Modify a Graphic ADOR expression to use ulmage templates with uPlan. ● Compare the differences between working with ulmage packages and templates. ● Upload and use the designs (InDesign & 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). 	<p>2 - 4 hours based on trainee's experience and allotted time</p>	<p>Mandatory:</p> <ul style="list-style-type: none"> ● Print Designers who will create document templates; ● Photoshop designers who will create the ulmage templates. <p>Desirable:</p> <ul style="list-style-type: none"> ● Marketing or business managers who request the campaign's marketing information and goals..



Optional Training

Optional modules

The following modules are optional and can be given on Day 4, depending on the products purchased, and the available time: Decide with your instructor, preferably on Day 3 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>Module 11 - Intermediate campaign objects/logic</p> <ul style="list-style-type: none"> ● Understand the differences between recipient data and additional data sources. ● Use two data sources to create a dynamic table using uCreate Print. ● Discuss and/or use uCreate to run proof and print production generated from uProduce. ● Discuss and/or use Circle to run proof and print production (if this workflow applies to the trainees). ● Repeat Module 7 using the alternative method (if app.) ● Advanced uPlan (if app.): <ul style="list-style-type: none"> » Describe and use the uPlan wizard and application GUI. » Create a new plan. » Understand, and create recipient data filters. » Use additional data sources with plan User Views. » Create ADOR tables, or Text ADORs using User Views. » Create and use a user-defined plan Function. 	<p>1 - 4 hours</p>	<p>Mandatory:</p> <ul style="list-style-type: none"> ● Print Designers who will create document templates. ● Database users who work with data sources and build the business logic-based campaign requirements. <p>Desirable:</p> <ul style="list-style-type: none"> ● Marketing or business managers who set the rules for changing the document design based on data values, and/or ● Programmers who intend to use the PersonalEffect API to develop custom applications (if applicable).

Optional Objectives	Duration	Audience
<p>Module 12 - Advanced print production options</p> <p>This module allows for more practice within the uProduce dashboard.</p> <p>Performance Objectives: At the completion of this training, the trainee will be able to:</p> <ul style="list-style-type: none"> ● Generate other types of print output formats. ● Filter data records for specific output using data queries. ● Process a campaign that uses more than one data source for output. ● Review administrative screens and configure output settings. 	1 hours	<p>Mandatory:</p> <ul style="list-style-type: none"> ● Print Designers who will create document templates; ● Production managers who will process and print output files. <p>Desirable:</p> <ul style="list-style-type: none"> ● Programmers who intend to use the PersonalEffect API to develop custom applications (if applicable).
<p>Module 13 - uChart introduction</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>Performance Objectives: At the completion of this training, the trainee will be able to:</p> <ul style="list-style-type: none"> ● Generate a Table ADOR using a User View linked to additional data within uPlan or linked to second data table using the Rule Editor. ● Use the Table ADOR to create dynamic InDesign tables. ● Discuss mold rows, auto-flow, suppress empty tables. ● Place the Table ADOR into a graphic box to create a dynamic chart. ● Use the uChart interface to configure the chart. 	1 – 3 hours.	<p>Mandatory:</p> <ul style="list-style-type: none"> ● Print Designers who will create document templates. <p>Desirable:</p> <ul style="list-style-type: none"> ● Marketing or business managers who set the rules for changing the document design based on data values.

Optional Objectives	Duration	Audience
<p>Module 14 - High-level overview of web service APIs</p> <p>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>Performance Objectives:</p> <p>At the completion of this training, the trainee will be able to:</p> <ul style="list-style-type: none"> ● 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. ● Locate and discuss the API documentation and sample walkthroughs. 	~ 1 hour	<p>Mandatory:</p> <ul style="list-style-type: none"> ● Programmers who intend to use the PersonalEffect API to develop custom applications. <p>Desirable:</p> <ul style="list-style-type: none"> ● Marketing or business managers who set the rules for changing the document design based on data values.
<p>Module 15 - Adding lead acquisition</p> <p>This module is taught, only if time allows.</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>Performance Objectives:</p> <p>At the completion of this training, the trainee will be able to:</p> <ul style="list-style-type: none"> ● Create a self-registration page and form. ● Set up a triggered email. ● Add twitter and facebook buttons. 	1 - 2 hours	<p>Mandatory:</p> <ul style="list-style-type: none"> ● Print designers and/or Web designers who will create the personalized web sites. <p>Desirable:</p> <ul style="list-style-type: none"> ● Database users who work with data sources and build the business logic-based campaign requirements. ● Marketing or business managers who set the rules for changing the document design based on data values. ● Web Developers that will be implementing designs outside of XMPie environment.



Additional courses from XMPie

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

Onsite, Instructor-lead 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 (Basic) – 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, Instructor-lead courses

- uDirect Classic (1 x 3 hour)
- uDirect Studio (2 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 - for North American enquiries
trainingROW@xmpie.com - for enquiries from other regions

XMPie Sites

Support

- » <http://xmcircle.com/> - XMPie Circle, the link may change, please reference the letter you received when you signed up for this service - for free account, write to 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 e-learning and training hub for current XMPie Customers.
- » <http://info.xmpie.com> - XMPie Information Portal with access to additional case studies, presentations, and much more.
- » <http://help.xmpie.com> - All product user guides, release notes, and knowledge bases are available online. This page shows the latest release versions and provides links to the each product or solution help page.

About and more...

- » <http://www.xmpie.com> - XMPie website has case studies, product brochures, and links to our other sites.
- » <http://kiosk.xmpie.com> - A site of examples and demo stores, great for inspiration and ideas.
- » <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, XMPL and uStore

- » <http://xmcircle.com/> - XMPie Circle, the link may change, please reference the letter you received when you signed up for this service - for free account, write to special@xmcircle.com for information.
- » <https://github.com/XMPieLab/XMPL-sdk/wiki> - Home page for the XMPL-SDK, used to add personalization to your HTML pages.
- » <https://github.com/xmpie-users/uStore-js/wiki> - uStore Extensibility Wiki is a repository of code snippets, tips and tricks for extending, enhancing and customizing XMPie's uStore product.
- » <https://github.com/XMPieLab/uStore-NG/wiki> - uStore NG Theme documentation, samples themes and snippets.
- » <https://github.com/XMPieLab/uStore-NG/wiki/uC3D---3D-Product-Visualization> - uC3D technology json code information and snippets.

