

# PE Web-to-Print Training

## Customer Expectation Document

### XMPie PersonalEffect StoreFlow, XMPie PersonalEffect uStore, or XMPie Enterprise Print + uStore

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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® Web-to-Print. 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 (3 or) 4 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:** Designers creating products, and those using the back office should attend.



# About PersonalEffect Web-to-Print

PersonalEffect StoreFlow and PersonalEffect uStore are an all-inclusive web-to-print solution for creating and managing online stores and marketing portals. A high-value, all-in-one solution supporting both variable documents and static user-submitted documents.

With PersonalEffect StoreFlow or PersonalEffect uStore, 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 products customized by the buyer at the time of purchase.

**There are four versions of PersonalEffect's Web-to-Print Turnkey systems. It is important to note which software bundle was purchased, as this has some effect on training and workflows.**

- ❑ *PersonalEffect StoreFlow* (software bundle) includes the following software components: uProduce XE (XLIM production server), uStore (Web2Print) with Xerox FreeFlow Core (prepress application), uEdit (store document editor), a single uCreate Designer (InDesign plug-in) license, and a single uProduce/uCreate connection license.
- ❑ *PersonalEffect StoreFlow Pro* (software bundle) includes the following software components: uProduce IND (XLIM & InDesign production server), uStore (Web2Print) with Xerox FreeFlow Core and Advanced Prepress (prepress application), uEdit (store document editor), a single uPlan (logic module) license, a single uCreate Print (InDesign plug-in) license, a single uCreate Designer (InDesign plug-in) license and three uProduce/uCreate connection licenses.
- ❑ *PersonalEffect uStore* (software bundle) includes the following software components: uProduce XE (XLIM production server), uStore (Web2Print), uEdit (store document editor), a single uCreate Designer (InDesign plug-in) license, and a single uProduce/uCreate connection license.
- ❑ *PersonalEffect uStore Pro* (software bundle) includes the following software components: uProduce IND (XLIM & InDesign production server), uStore (Web2Print), uEdit (store document editor), a single uPlan (logic module) license, a single uCreate Print (InDesign plug-in) license, a single uCreate Designer (InDesign plug-in) license and three uProduce/uCreate connection licenses.

You might be viewing this document if you purchased an enterprise solution, in which uStore was added to your configuration. It is important to note which software bundle was purchased, as this has some effect on training and workflows.

- ❑ *Enterprise Print+uStore* (software bundle) includes the following software components: uProduce Director IND and Extension servers (XLIM & InDesign production), a single uProduce IND Development Print server, 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 connection licenses + uStore (Web2Print), uEdit (store document editor).

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 not sure.







# Course overview

This course is designed to provide introductory training on the latest version of XMPie PersonalEffect StoreFlow or PersonalEffect uStore 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, and why they are an important tool for today's marketers and print service providers

Participants will start with XMPie's desktop tools for building business rules (logic) and to create VDP print templates using Adobe InDesign. 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.

Throughout the course, more advanced topics/features will be discussed and demonstrated, providing a solid grounding on the basics of creating variable data print campaigns and basic store fronts.

## 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.

Based on customer needs, purchased configuration, and other expectations, this training might be sold as three (3) days onsite. Agenda topics and/or allotted to time to cover them will be reduced to fit within the purchased training time.

## 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 those attending don't have the necessary skills and experience outlined in [Prerequisites and preparation](#) section, 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 StoreFlow, or where new staff have joined the organization and they have no previous knowledge of XMPie products.

The team involved in creating and producing successful VDP campaigns, online stores, products, administering store fronts, orders, prepress and print production 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..
- 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.
- 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 basic understanding of internet technologies,
- a basic understanding of e-commerce concepts and solutions,
- a working knowledge of Adobe InDesign,
- a basic understanding of the aim / objective of variable data printing (VDP), and
- basic skills with handling data (CSV, Microsoft® Excel®, Access®, etc.) along with some logic/scripting skills.

A complete list of [Prerequisites and preparation](#) 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 marketing material.
- Communicate the benefits of web-to-print marketing portals.
- 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).
- Create VDP-W2P (print) templates 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).
- 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.



# Prerequisites and preparation

## Adobe training

If participants are new to Adobe InDesign, it is recommended that they first participate in an Adobe training course. 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.
- 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.

## 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.

## General computer skills and internet knowledge

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/RIPs) knowledge of basic networking is essential.

## 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.

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.

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.

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.



# 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, Adobe Photoshop (optional),
  - XMPie uCreate Print (Professional, Designer or 30-day trial),
  - 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)
	<i>(ex. http://servername_or_IP/xmpiedashboard)</i>	<i>(ex. admin)</i>	<i>(ex. admin)</i>
Dashboard	http:// <i>(ex. http://servername_or_IP/uStoreAdmin)</i>	<i>(ex. admin)</i>	<i>(ex. admin)</i>
uStore	http://		
FreeFlow Core	<i>(ex. http://servername_or_IP/freeflowcore)</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.

## Computer and software

All participants must have their own computer, or access to a computer for this training. Computers can use either the Macintosh or Windows operating systems. If the uPlan application was purchased, there must be at least one workstation with Windows in order to install and use this application during training. Computers must have Adobe InDesign with version CS6, CC 2014 or CC 2015 installed. Adobe Photoshop will be required but only if the ulmage add-on application was purchased. 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 the [Prerequisites and preparation](#) section 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.

## XMPie server installation

**XMPie, Xerox or your channel partner will install and test the server products you have purchased. It would be best, 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 servers. This means that afterwards, the sample campaigns, websites and documents created during training will not be available onsite.

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. Remote access is required to run the update utility on this server. This 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.

# Course agenda

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

The order of the modules might change, based on customer requirements (ie creating dynamic documents, Module x, may be presented after Module 1, pushing all remaining modules forward.)

Additional topics may be included where appropriate for the group and when time permits.

## 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 Print, 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 why do we need it.</li> <li>● Explain how VDP is used in a Web to Print workflow.</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 - 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. 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 3 - 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>● A short review of uProduce administrative screens in order 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 4 - Basic store startup</b></p> <p>This module covers the basics for creating stores and adding static products, pricing, product properties and product profiles.</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>

## Day 2

Objectives	Duration	Audience
<p><b>Module 4 - Basic store startup (cont'd)</b></p> <p>Complete this module, since we will need products to test within the next module.</p>	tbd, ~1 hour	

Objectives	Duration	Audience
<p><b>Module 5 - Testing products and processing orders</b></p> <p>This module allows ordering products and making sure they work as expected. After which we process the incoming orders.</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>● Test and order products created in previous module.</li> <li>● Review order queues and how orders flow through the system as well as reviewing order details and job tickets.</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>
<p><b>Module 6 - 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> At the completion of this training, the trainee will be able to:</p> <ul style="list-style-type: none"> <li>● Generate predefined reports.</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> <li>» Discuss and/or implement taxes.</li> </ul> </li> <li>● Discuss and/or implement store locationalization.</li> <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>● Review Triggers to automate processing of orders/emails.</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>

Objectives	Duration	Audience
<p><b>Module 7 - 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>	<p>~1 hours</p>	<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>

Objectives	Duration	Audience
<p><b>Module 8 - Basic VDP-W2P campaigns (part 1 - template creation)</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 to be used as a web-to-print product.</p> <p>The product will be determined by the instructor and trainees, it will likely be either a customized postcard or 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>● 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>» Understand and set Campaign Dials for customization in uStore (ADORs and variables).</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>● Discuss how XLIM is used for uEdit.</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>remaining time for Day 2 and complete on Day 3</p> <p>~ 3-4 hours</p>	<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>● 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 APIs to develop custom applications (if applicable).</li> </ul>



## Day 3

Objectives	Duration	Audience
<p><b>Module 8 - Basic VDP-W2P campaigns (cont'd)</b></p> <p>Complete this module if needed.</p>	<p>tbd, ~1-2 hour</p>	
<p><b>Module 9 - 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.</li> <li>● Create new Account and Campaign containers and modify their properties.</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 using the check-out/check-in process and how that is essential for uStore products.</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 (depending on product purchased).</li> <li>● Review how the proof and process methods are used for uStore production.</li> </ul>	<p>2 hours</p>	<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>

Objectives	Duration	Audience
<p data-bbox="152 197 764 281"><b>Module 10 - Basic VDP-W2P campaigns (part 2 - product setup)</b></p> <p data-bbox="152 302 894 380">In this module participants add dynamic products to their stores using the templates created in the previous module.</p> <p data-bbox="152 394 472 426"><b>Performance Objectives:</b></p> <p data-bbox="152 436 911 468">At the completion of this training, the trainee will be able to:</p> <ul data-bbox="152 478 943 1150" style="list-style-type: none"> <li>● Create dynamic store products. <ul style="list-style-type: none"> <li>» Review preparation of dynamic document templates for implementation as dynamic products (proof/process on uProduce).</li> <li>» Review the different types of campaign dials and how they are used in uStore.</li> <li>» Use and configure customization (dial) options, input types, input sources 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 need 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 data-bbox="961 197 1110 228">1-1.5 hours</p>	<p data-bbox="1159 197 1308 228">Mandatory:</p> <ul data-bbox="1159 239 1468 485" 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 data-bbox="1159 506 1292 537">Desirable:</p> <ul data-bbox="1159 548 1468 1262" 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 11- 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 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 as dials to use with ADORs.</li> <li>● Use the View QLingo window to modify rules.</li> <li>● Save to uProduce (if opened from) or discuss methods of updating files on uProduce based on the 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 logic 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 file.</li> <li>● Create (plan) variables as dials to use with ADORs.</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 the changes.</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 (Optional\*)

Objectives	Duration	Audience
<p><b>Module 11 - Making changes to VDP-W2P product (cont'd)</b></p> <p>Complete this module, if needed.</p>	tbd	
<p><b>Module 12 - FreeFlow Prepress Workflows (if app.)</b></p> <p>This module covers the basic tasks in the FreeFlow Core software which enables the streamlining of prepress workflows..</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>● Understand the FreeFlow Core interface.</li> <li>● Discuss prepress tasks.</li> <li>● Create prepress workflows.</li> <li>● Link uStore products and product profiles to different FreeFlow Core workflows.</li> <li>● If available, connect FreeFlow Core workflows to supported digital RIPs for production of output.</li> </ul>	1 - 2 hours	<p>Mandatory:</p> <ul style="list-style-type: none"> <li>● Prepress and production staff who will manage print jobs ordered via the online stores..</li> <li>● Those implementing and managing uStore stores and products.</li> </ul>

\* At times, this training is sold as three days vs. four. Day 4 is an opportunity to take time to review topics covered during training, create more VDP products, complete earlier modules, or to look at your current online stores/products and discuss how they could be implemented with PersonalEffect uStore or PersonalEffect Storeflow.

If this training is sold as three days, topics and/or allotted to time to cover them will be reduced to fit within the purchased time.

# 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><b>Module 13 - Advanced uStore activities</b></p> <ul style="list-style-type: none"> <li>● Duplicate stores and/or products across stores, then configure, as needed, to implment new products.</li> <li>● Create or modify a messaging template.</li> <li>● Create new triggers to automate the process/production of incoming products.</li> <li>● Setup approval systems or modify those created earlier.</li> <li>● Setup different types of stores, B2B, B2C or uStore Connect stores (if app).</li> <li>● Connect an external data source and program its use within customization values.</li> <li>● Make basic changes to a uStore skin and apply the new skin to the store.</li> <li>● Create new composite products' preview campaign.</li> </ul>	<p>1 - 4 hours</p>	<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> <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,</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 14 - 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>● Create and use the Audiences feature.</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 11 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>	1 - 4 hours	<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,</li> <li>● Programmers who intend to use the PersonalEffect API to develop custom applications (if applicable).</li> </ul>
<p><b>Module 15 - Advanced uProduce options</b></p> <p>This module allows for more practice within the uProduce dashboard.</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 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>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>

Optional Objectives	Duration	Audience
<p><b>Module 16 - 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 17 - uChart campaign</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><b>Module 18 - High-level overview of web service APIs</b></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><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 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>● Locate and discuss the API documentation and sample walkthroughs.</li> </ul>	<p>1 hour</p>	<p>Mandatory:</p> <ul style="list-style-type: none"> <li>● Programmers who intend to use the PersonalEffect API to develop custom applications.</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>



# 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 received 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.

