

# uDirect Classic Training

## Customer Expectation Document

### XMPie uDirect Classic

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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 uDirect® Classic. 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.

## About uDirect Classic

uDirect Classic harnesses the power of variable data printing (VDP) to help organizations of all sizes to develop powerful, personalized print campaigns that easily, efficiently and cost-effectively reach their audience with relevant, personalized print communications.

uDirect Classic leverages Adobe® InDesign®, simple data sources, and your business rules or logic to create personalized documents in an easy-to-use VDP solution.

uDirect Classic is a software package that includes the following software component: uCreate Print Standard (also known as the standard plug-in). Other components such as ulmage and/or uChart are available as add-ons. Those products require additional training and are not included in this course.

# Course overview

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

The course starts with a brief introduction and review of the agenda.

Training will introduce the concept of VDP and why it is an important tool for today's marketers and printers. Examples of VDP campaigns may be shown to help illustrate this if necessary.

Participants will be shown the plug-in panel interface and start using the product at a basic level. As the course progresses, more advanced topics/features will be discussed and demonstrated, providing a solid grounding on the basics of creating variable print templates, setting up business rules or logic, and generating the final print output file.

## Duration and delivery method

One 3-hour online session with an instructor using WebEx (or similar software) for web and phone conference.

In order to get the best value from web-based training, please refer to the [Required facilities and equipment](#) 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 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 uDirect Classic, or where new staff have commenced with the organization and they have no previous knowledge of XMPie software.

The target audience is:

- Print designers, who will create InDesign document templates using uCreate Print.
- 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.
- Prepress or production staff who will create the variable data print output from the InDesign document templates.
- System analysts, 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 have no previous knowledge of the XMPie products. However, it is expected that participants will have:

- 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](#) is outlined later in this document.

## Goals and objectives

At the end of this course, it is expected that participants will be able to confidently:

- Communicate the benefits of personalizing marketing material.
- Link file-based data sources to Adobe InDesign documents using uCreate Print.
- Create ADORs (content objects) and place them into InDesign to create VDP templates.
- Create business rules using the Rule Editor to change the document design based on database values.
- Recognize, create and use different types of ADOR objects within the VDP templates.
- Understand and use a few advanced features and functions (e.g. XMPie barcode function, copy fitting, dynamic print, etc.) where applicable.
- Generate dynamic print files for a range of database recipients in different VDP output formats.

# 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 this 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, and/or Access.
- 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 - for example if/else statements.

## General computer skills and network knowledge

The Adobe creative tools, and XMPie uCreate Print are compatible with both Microsoft Windows and Apple Macintosh computer systems. 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.

## 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 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 Standard. However, if desired, participants in this training can get a head-start by downloading, working through and/or reviewing 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.

To review training materials, download tutorials and watch video, please visit XMPie Campus. Links to this and other sites mentioned in this document, see the [XMPie Sites](#) 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.

Connection to the internet is required to access the web conference.

A telephone is preferred to connect to the voice conference. If more than one participant is joining from the same room, a purpose-built duplex conference phone is desirable. Alternatively, individual headsets with microphones, used on laptop computers will work when participants are not in the same location.

In order for participants to be hands-on during the training, it is recommended to either:

- a) have two monitors on your computer so you can watch the web conference on one display, while using InDesign and uCreate Print on the second, or
- b) in a group environment, one computer attached to a projector or large flat panel display showing the web conference, and individual computers for participants to use InDesign and uCreate Print hands-on.

## Computer and software

All participants must have their own computer, or access to a computer for this training. Computers must have Adobe InDesign with version CC 2018 or CC 2017 installed. 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](#) 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 your trainer prior to training.



# Course agenda

The following agenda is provided as a guide only. The pace of the course may change depending on the skills, experience and progress of the participants. Also, additional topics may be included where appropriate for the group and when time permits.

Objectives	Duration	Audience
<p><b>Module 1 - Introduction and overview</b></p> <p>This introductory module is an overview of XMPie uDirect Classic and what it can do, including an explanation of the terms and concepts that will be used during training.</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 what will be covered during training.</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>● Distribute and review the tutorial files.</li> </ul>	15 minutes	Everyone is invited to this presentation.
<p><b>Module 2 - Using uCreate Print Standard panel</b></p> <p>This module will start the hands-on training using the uCreate Print Standard (aka uCreate Print) panel by introducing the panel and its basic use:</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>● Describe and use the uCreate Print panel.</li> <li>● Locate and reference the user guide documentation (help).</li> <li>● Understand how ADOR values are based on the linked data and business rules, view data values within the panel.</li> <li>● Place Text ADORs and use the copy fitting (text) feature.</li> <li>● Use common features available on the panel, such as searching for longest or shortest names, turning on/off the data values and using highlight with InDesign screen modes.</li> </ul>	30 minutes	<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>

Objectives	Duration	Audience
<p><b>Module 3 - ADOR / Content Object types</b></p> <p>This module builds on the last session to introduce the other ADOR types.</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>● Explain and use the different ADOR types.</li> <li>● Change Text ADOR objects to other ADOR types.</li> <li>● Discuss why and how to set the asset source location.</li> <li>● Explain the difference between assets and resources.</li> <li>● Place graphic ADORs into the design and use fitting modes.</li> <li>● Discuss using in-line graphics (e.g. letter signatures, logos, highlights) that flow with document text.</li> </ul>	30 minutes	<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>
<p><b>Module 4 - Use the Rule Editor and Audiences</b></p> <p>This module shows how to create new ADOR objects and introduces the rule editor and how to build business rules/ logic.</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 and use new ADOR objects of various types.</li> <li>● Create and use the Audiences feature.</li> <li>● Use the Rule Editor to modify logic used to calculate ADOR object values.</li> <li>● Use common built-in functions including if/then statements.</li> <li>● Place and/or assign different ADORs types to the design layout.</li> <li>● Use other common features such as suppressing blank lines, previewing different recipients (validate rules), etc.</li> </ul>	30 minutes	<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>

Objectives	Duration	Audience
<p><b>Module 5 - Generate dynamic output</b></p> <p>This module explores generating print-ready output for multiple recipients.</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>● Locate and use the Dynamic Print dialog to generate output.</li> <li>● Explain the difference between different VDP output formats.</li> <li>● Use simple imposition and other basic dynamic print features.</li> <li>● Use advanced printing features, such as document bleed.</li> <li>● Explain how transparency and other features affects print performance.</li> </ul>	30 minutes	<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>
<p><b>Module 6 - Advanced topics</b></p> <p>Depending on the available time remaining, some of the following advanced topics may be discussed or demonstrated.</p> <p><b>Performance Objectives:</b> At the completion of this training, the trainee will be able to perform some or all of the following:</p> <ul style="list-style-type: none"> <li>● Use a Counter data source type.</li> <li>● Create barcodes using XMPie Barcode function, such as those required for mailing, QR codes, etc.</li> <li>● Use the Find &amp; Replace feature for new documents.</li> <li>● Program a single visibility object to control multiple layers.</li> <li>● Use a second data source to create and use a Table ADOR.</li> <li>● Discuss dynamic document length - adding pages automatically for some recipients.</li> <li>● Discuss dynamic media selection - changing the media (paper stock) automatically for some recipients based on output format type.</li> <li>● Import rules and ADORs from a previous document.</li> </ul>	15-45 mins depending on remaining time	<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>

# 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.