

PersonalEffect Full Suite

Variable Data Printing (VDP), Web-to-Print (W2P), and TransMedia (CROSS-MEDIA)

Customer Expectation Document
Instruction-led Sessions (40 or 80 hours)

Created for the following software bundles:

PE TransMedia Pro + uStore,
or **Storeflow Pro + Cross-Media add-on,**
or **Enterprise Cross-Media + uStore**

Multi-channel customer communication (CCM), E-Commerce (Web-to-Print),
and server-based variable data print (VDP) campaign solutions

Software versions: PE v11.x+ / uStore v15.x+ / XMPL 3.1.4+ / XES 3.x+ / Circle 9.x+

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one to one in one™

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

There is a lot of information in this document, from what to do to 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, we highly recommend it. 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](#) (within Prerequisites and preparation) for more information.

XMPie environment: Using your system environment is best for hands-on training exercises; exceptions are possible. Refer to the [Required facilities](#) section for more information.

Room Setup: (completed before training): Besides the XMPie environment, it is best to coordinate how to set up the training area (e.g., when to install applications, move computers if needed, etc.). Refer to the [Required facilities](#) section for more information on who should attend each day's training.

We understand that it is not always possible to take everyone away from their regular routines for several hours (or days). Therefore it is strongly recommended that a small, core group of XMPie software users and a team lead attend every training.

Lessons incorporate previous learning. The core trainee group could be a print designer, a web designer, a database/mailling list manager, a store product administrator, an API programmer (if using a system as a platform), a web designer/developer, and a project manager. See the Agenda for more information requirements. **The Agenda is somewhat flexible and can be adjusted based on needs.**

Part I (Overview & Variable Data Printing): Everyone that works with, sells, and manages the capabilities of XMPie software should attend the Overview. Hands-on training starts after the Overview, and all those using the software should attend these training sessions.

Part II (Web to Print): Hands-on training encompasses two main areas, using and managing the store and its products and designing dynamic products. Product designers and Store Administrators should attend these training sessions.

Part III (Cross-Media): Cross-media designers, managers, and web designers/developers/administrators should attend these sessions.



About XMPie PersonalEffect & Training

XMPie PersonalEffect (PE) full suite comprises several integrated software products engineered to support high-volume data-driven print output, other types of personalized media, and creating/managing online marketing portals (stores). It becomes the foundation for other XMPie bundled software allowing your solution to grow alongside your business.

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

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

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

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

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

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

Often the above software packages have custom configurations when sold. It is essential to note which software configuration was purchased, as this affects training and workflows.

The most notable difference between software bundles is the type of print production server (or servers) purchased. The production server comes with one or two print composition mechanisms, XMPie XLIM (XMPie's proprietary layout engine) or (both) XMPie XLIM, and the Adobe InDesign CC Server, noted as XE or IND, respectively. Your bundle may or may not include a development server.

PersonalEffect Full Suite Introductory Training typically includes discussions about all our products. A 40-hour (or 5-day) training goal is to review all of the software you've purchased as time allows. An 80-hour (or 10-day) training goal is to review all of the software you've purchased, either with two different groups or by allowing more time for each topic.



Course overview

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

The course starts with a brief Overview/Introduction and review of the course outline. The Overview will describe the concepts of variable data printing (VDP), web-to-print (W2P) or marketing portals, TransMedia communications, and why each is an essential tool for today's marketers and print service providers. A short review of examples of web-to-print and cross-media campaigns helps illustrate possibilities.

Participants will start with desktop tools to build business rules (logic) and create the VDP print templates. The production server interface shows the collaborative teamwork approach to building campaigns and the performance of server-based print production. (Part I)

The course progresses to review how users interact with storefronts and how to build storefronts and various products. Training includes highlights of store management and other requirements of this e-commerce system. (Part II)

The course continues to the next set of topics covering cross-media by creating personalized emails and websites using XMPie OpenXM technology, cross-media tools, and analytics. (Part III)

Each section of this training outline provides discussions, reviews, and hands-on training to get you started with your new capabilities.

Duration and delivery method

An XMPie instructor and subject-matter expert will deliver your purchased training (40- or 80-hours).

Single-customer (one or more trainees) virtual training sessions of 1.5, 2, or 3 hours each, once or twice a week, are best for most teams. Virtual sessions are delivered using Microsoft Teams' (online conferencing tool) meetings scheduled by the instructor. Your virtual training schedule can be flexible; advanced planning is always good.

Should in-person training be required, sessions will be 8 hours per day, plus a mid-day break (of 30-60 minutes) for five consecutive days. (80-hours is split into two 5-day training sessions.) Another option for training delivery is the combination of virtual and in-person training. Please review your training purchase and options with your instructor. You should be aware that there may be an additional charge for in-person training delivery.

Please refer to the [Prerequisites and preparation](#) and [Required facilities and equipment](#) sections later in this document to get the best value from this training.

Number of participants

We recommend limiting the number of participants to 10.

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

There is no guarantee that training goals are achievable. Several factors can lead to less than desirable results; too many participants, participants without the required skills, participants that do not practice new skills during and between sessions, too much time between sessions, and too little interaction during sessions. Address your concerns with your instructor before or between your training sessions.

Who should attend

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

The teams involved in creating and deploying multi-channel marketing and e-commerce platforms are very diverse. The agenda lists the target audience for each module.

In general, the target audience for introductory training is:

- Print designers - create InDesign document templates using uCreate (plug-in)
- Web designers - generate web and email document templates using Circle, Dreamweaver (or another HTML editor)
- Web designers or developers - integrate XMPL and other web code into your web and email templates
- Marketing or business specialists - determine the business rules (logic) used to change the document content based on data
- Database administrators - manage the data used for campaigns
- Prepress or production staff - generate the variable data print output from document templates using server application(s)
- e-commerce Administrators - build stores, set up products, and handle orders
- System analysts, project managers, support engineers, trainers, demonstrators, and other personnel - demonstrate, use, train, or support Adobe and XMPie products within your company

While no knowledge of XMPie software is required, collectively, participants need:

- basic understanding of the aim/objective of variable data and cross-media campaigns,
- basic understanding of e-commerce concepts and solutions,
- working knowledge of Adobe InDesign and Adobe Photoshop (if needed),
- basic skills with handling data (CSV, Microsoft® Excel®, Access®) along with some logic and scripting skills,
- basic understanding of networking and internet technologies,
- working knowledge of building websites, HTML, and web scripting skills.

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

Goals and objectives

This training's scope is to introduce the software you've purchased and provide the basic functionality to start using it. Many features and methods exist to implement and expand our software within your workflow. Depending on your goals, some topics will be out-of-scope for introductory training, and the list below should guide your primary objectives.

At the end of this course, participants will be able to:

General:

- Communicate the benefits of personalizing single and multi-channel marketing materials.

- Communicate the benefits of marketing portals and using e-commerce systems.
- Log in and use our learning portal, Campus.
- Locate the user guides and other resources.
- Log in and use our support and information portals.

Part I:

- Create simple VDP (print) templates implementing different dynamic content.
- Recognize, create and use different Content Tags (ADOR).
- Create and modify expressions to align with business rules.
- Understand and use a few advanced features and functions (e.g., barcode functions, copy fitting, dynamic print, etc.).
- Understand and design templates for server production using appropriate input document formats (XLIM or Adobe InDesign).
- Use the server interface to generate dynamic PDF output.

Part II:

- Discuss storefront requirements and global configurations.
- Create, configure, and customize online stores with a few types of products.
- Understand the template setup requirements for dynamic products (if applicable).
- Create and manage users, user groups, and group permissions.
- Understand or create an order approval process.
- Handle and process store orders.
- Create and test simple prepress workflows for output using FreeFlow Core (where applicable).
- Generate basic uStore reports.

Part III:

- Plan and collaborate on multi-channel marketing campaigns.
- Using XMPie OpenXM, create the templates for a simple multi-channel campaign that includes personalized webpages, multi-part emails, and SMS (if applicable).
- Understand the methods of creating email templates.
- Discuss email campaign limitations (design, volume, spam, etc.)
- Understand how forms can update or append recipient information in the database and (if applicable) implement a simple webpage update form.
- Understand how to test the campaign project.
- Understand how to use and share the campaign project analytics.

Disclaimer: It is not the instructor's responsibility to build your templates and document logic, implement your storefront(s) or develop your cross-media campaigns. Based on your requirements, if you need help with implementation, integrations, or launching your new business capabilities, please reach out to your XMPie Account Manager to learn about our Application Services offerings and Professional Services integrations.



Prerequisites and preparation

English language

English is the primary language for training sessions. While some of our instructors are proficient in a second language, there may be delays and additional costs in scheduling the appropriate person. Please contact your XMPie Account Manager for further information.

General computer skills

Participants should be able to operate their computers (Windows or Mac OS), launch applications, manage documents, and print files using their production printers. When working with multiple, separate computer systems (client workstations, production servers, and output devices/RIP software), basic networking knowledge is essential.

Because XM sites exist in an external/internet environment, understanding basic internet protocols (e.g., DNS, SMTP, FTP, HTTP) and file transfer is required.

Adobe training

Participants new to Adobe InDesign, Photoshop, or Dreamweaver (HTML Editor) should first participate in an Adobe training course for these products. Adobe offers a wide range of courses, including recorded tutorials, with online and onsite training. For more information, refer to: <http://helpx.adobe.com/learning.html>

Adobe InDesign (for VDP document design) skills

Participants should have a working knowledge of Adobe InDesign before using uCreate Print/Designer. If participants are not regular users of Adobe InDesign, they should take some time to refresh their skills using InDesign before the course.

Specific InDesign and document skills to review:

- Create and modify existing document files, including page management.
- Create and modify text frames, place text, change attributes of characters and paragraphs, etc.
- Create graphic frames, 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.

Participants should understand prepress best practices for document design. For example, understand how image size and transparency can affect print speed. These basic prepress skills will help to ensure that the documents created will process and print efficiently.

Adobe Dreamweaver (or similar HTML editing) skills

In addition to basic web publishing knowledge, participants should have a working knowledge of Adobe Dreamweaver or similar application before learning XMPie OpenXM technology. If participants do not regularly modify web documents, they should take some time to refresh their skills in these technologies before the course.

Specific skills to review:

- Responsive webpage design using HTML5 methodologies.
- Configure new websites and file management of remote sites.
- Create and use various HTML page elements (e.g., header, body, div, img, anchor, etc.)
- Create html forms with various input types (text, hidden, radio, select, and submit) and objects.
- Modify external and internal CSS styling.
- Participants should understand data-driven website concepts.

Cross-media Web Design and Administration skills

XMPie's Open XM technology stack is an architecture for developing and integrating XMPie's personalization engine with any web-based environment. OpenXM has two main components:

- 1) XMPL Server can host personalized websites if desired and provides a connection point to personalized websites hosted on an external web server (for example, your corporate website) and
- 2) XMPL language and library (combination of XMPL HTML, XMPL Javascript, and XMPL RestAPI) provide custom tags and attributes to implement various personalization options.

Using the XMPL library allows the use of your preferred web editing software. The instructor will typically use Dreamweaver to show the basic concepts of XMPL to place Content Tags (ADOR) and attributes within a webpage. Trainees can use Dreamweaver or the editing software of their choice. Please note that the instructor is only responsible for troubleshooting XMPL code during training.

In addition to the XMPL language, the instructor will only train how to use the XMPL server's website hosting feature. While your server's setup is preferred, the instructor will use their training server to demonstrate this functionality as needed. Corporate and other websites can reach the XMPL server to deliver personalized content; however, that topic is out-of-scope during introductory training.

For more information on XMPL SDK, please refer to the XMPie Sites section of this document.

If participants are not familiar with web technologies, they should take some time to learn or refresh themselves with the skills listed below.

Specific skills to review:

- Internet protocols (e.g., DNS, SMTP, FTP, HTTP), managing remote websites (servers, files, connections), etc.
- HTML, CSS, and Javascript coding, including various tags and web forms.
- New website creation, publishing and testing.
- Responsive web design concepts.
- Understand the concepts of webpage redirection.
- Understand data-driven website concepts, including updating and appending records.

Additional Web Design and Development skills

uStore's administrative back office employs different web technologies to provide flexibility in front-end (customer-facing) and back-end (administrator-facing) interfaces. These technologies range from simple changes to a store's themes to complex program plug-ins. Like many platforms, the more in-depth skills available, the more complex the modifications you can implement.

Out-of-the-box uStore requires a basic knowledge of these skills:

- Internet server setup and protocols (e.g., DNS, SMTP, FTP, HTTP)
- Web design includes some CSS and HTML

Extending uStore requires knowledge of these skills:

- Web development (HTML/CSS/JS, ReactJS, JQuery, etc.)
- Database skills (MS SQL)
- Advanced programming (.Net, WebService API [if applicable])

Database and logic skills

The heart of variable data printing is the data. A basic understanding of data and databases is necessary. If participants do not regularly create or modify data, they should take some time to refresh their skills in these technologies before the course.

Participants should be able to:

- Understand the data your company uses (or will use) to produce variable content.
- Explain data concepts such as tables, rows, columns, fields, sorting, and de-duping.
- Manipulate flat data using Microsoft Excel, Microsoft Access, or similar programs.
- Explain the differences in data value types (e.g., text, number, boolean, date).
- Understand basic programming formulas/expressions (e.g., if/else statements, literal values).

Introductory knowledge of relational database concepts and SQL would be advantageous.

Skillset level requirements

XMPie training requires basic knowledge of several disciplines, as outlined above. The learning curve of XMPie software and the degree of technical experience required is directly related to the complexity of your campaign's requirements. You should not expect to learn or offer complex campaign applications without taking the time to build your skill sets in the required disciplines.

Pre-training tutorials (optional)

Participants (in the hands-on training) should start with basic tutorials of our software, providing an opportunity to maximize time with the instructor on more advanced topics and to discuss any questions raised during your self-study. If time does not allow for pre-training, even browsing these materials will help.

To learn how to create dynamic print templates, start with the [uDirect Studio Tutorial \(Birthday Cake\)](#) or using video training, we suggest the [uCreate Print Training](#) series.

To learn how to create cross-media campaigns, start with the [Cross-Media Tutorial \(Round World Travel\)](#), an excellent walk-through PDF or using video training, we suggest the [Circle and Cross-Media Training](#) series.

The [StoreFlow Tutorial \(Piece of Cake\)](#) is an excellent walk-through PDF. Browse this document before training to help prepare for Web-to-Print training topics. To learn through video training, we suggest the [XMPie StoreFlow Training](#) series.

The above tutorials are a fantastic way to continue building your skillset with XMPie software before, during, or after training. To review training materials, download tutorials, and watch videos, please visit XMPie Campus. Reference the XMPie Site section at the end of this document for links to these tutorials.

Required facilities and equipment

Checklist

For each checkbox item, more details will follow this list:

- Workstations with an internet connection and network connection to the XMPie environment (from either regular or virtual office with VPN)
- If possible, two monitors (one to watch, one to follow along as desired)
- Required software on Windows or MAC workstations:
 - Adobe Creative Cloud with InDesign and Photoshop installed
 - Adobe Dreamweaver or similar HTML editing application
 - XMPie uCreate Print (licensed or 30-day trial key) with XMPie ulmage
 - XMPie uPlan (one or more Windows workstations, licensed or 30-day trial)
- Please complete the chart below (URLs with user/password to access your servers and accounts) and details of any printer/rip used during the training.

Site	URL	User or Admin (if not default)	Password (if not default)
Circle	http://xmcircle.com		
uProduce	http://_____/xmpiedashboard		
uStore Admin	http://_____/uStoreAdmin		
XMPL access	<i>Access through FTP or Network to special hosted site folder</i>		
Remote	<i>We should not need remote access during training. It is good to know how to get this access should something come up.</i>		
Other			

- When training as a group, we suggest using a quiet conference room away from production or office areas with a large display (monitor or projector) to allow screen sharing.
- If this is an in-person training event, the instructor will need:
 - to use the large display, along with an internet connection. instructors will bring their company-provided laptops with required software and implemented security features (anti-virus, etc.)
 - a whiteboard or flip-chart, and markers if available (not required, though much appreciated)
 - Beverages (facilities or service) when training sessions are a full day (not required, though much appreciated)

Network, printer and internet access

Participants need a connection to the XMPie server environment based on their network configuration and system setup. If you need help with this or want to test before training, please reach out to [XMPie Support](#).

The instructor does not need access to your network unless you want them to have this. The instructor (when in-person) requires internet access and access to their XMPie Training servers, and they can provide more details if needed.

An IT network or system administrator should be available to assist the instructor (when in-person) and trainees.

Computer and software

All participants must have their computer or share access to a computer for the hands-on portions of the training. Computers can use either the Macintosh or Windows operating systems.

- There must be at least one workstation with Windows to use and learn the uPlan application (where applicable).
- Computers must have Adobe applications installed (Creative Cloud, Adobe InDesign, Photoshop) and XMPie uCreate Print/Designer to use and learn how to create dynamic templates before training.
- Computers must have Adobe Dreamweaver or similar applications to learn how to create dynamic web templates.

If the number of trainees is greater than the number of licenses, or if trainees will be using temporary computers, the instructor can provide a uCreate Print trial license for training purposes only. Please be aware that our desktop 30-day trial license keys may unlock more functionality than purchased. After this period, the software reverts to limited-trial functionality. To obtain a temporary license, please ask the instructor.

Critical Notes:

- Please note that XMPie server and desktop applications are version-specific and should always match.
- All applications must be available before training to allow participants sufficient time to learn or refresh skills and avoid training delays. See [Prerequisites and preparation](#) for a more detailed list of skill sets.
- Adobe Creative Cloud Suite (desktop) is updated annually to a new version; auto-updates must be disabled.

XMPie server(s) installation

XMPie, Xerox, or your channel partner will install and test the server products you have purchased. Please have your server available for training.

If servers are not available in time for training, the instructor will use temporary, remote training servers. Any work saved on the training servers may not be available in the future.

If your XMPie environment includes a proxy/web/XMPL server, this server requires a configuration file (used by ISAPI Rewrite from Helicon) automatically updated through various XMPie applications. Remote access to the proxy server is only needed in special cases.

The XMPL server (often installed on the Proxy) must be available via FTP or network access to pull/push webpages and files. As needed, ask [XMPie Support](#) for help with this step during the server installation or before training.

To modify stylesheets (themes/skins) or product property icons within store setups might require mapped network shares used for the uStore server. As needed, ask [XMPie Support](#) for help with this step during the server installation or before training.

XMPie Email Service (XES)

XMPie Email Service is an essential tool for our cross-media solution. With your purchase of this solution, you can subscribe at the 1,000 email credits per month for free. Hands-on exercises with emailing functionality and testing are enabled when you implement this service before training.

For more information about this service, visit: <https://www.xmpie.com/xmpie-email-service/>.

XMPie Circle Connection

When you purchase a configuration that includes cross-media, you are provided a free subscription to Circle, referred to as *PersonalEffect Bundled* subscription. During your purchase cycle, you may have upgraded your subscription to this service (or might want to); it is best to understand which subscription you are using with your installation.

Team and Business Edition Circle subscriptions unlock features that provide advanced functionality.

For more information about this service and the subscription level features, visit this page:

<http://circle.store.xmpie.com/>.

With your license keys, you received an informational letter that includes instructions to activate and complete your registration for this account. If you did not receive this letter, please send a request to [XMPie Support](#), and the team will provide the necessary information.



Course agenda

This course outline is provided as a guide only. The pace of the course may change depending on the skills, experience, and progress of the participants. Each module has descriptions and objectives, and some modules are not optional and are presented based on the typical learning flow of the software.

- **Part I - Personalized Print (Allotted Time: 8-12 hours)**

After an overview, you will learn template creation with uCreate, building simple business rules, saving templates to the uProduce, and running production based on settings (using the server).

If applicable and if time allows, you may learn how to modify business rules using uPlan or implement ulmage or uChart.

- **Part II - Web-to-Print / E-Commerce (Allotted Time: 12-16 hours)**

Using uStore, you will learn how to create a sample B2B store, set up different products (static, dynamic, and other product types based on allotted time and business requirements), and test functionality.

Using FreeFlow Core (if applicable), you will learn to create a basic prepress workflow using FreeFlow Core and apply it to a product for production.

Some topics require skills learned from Part I.

- **Part III - TransMedia (XM/CROSS-MEDIA) (Allotted Time: 12-16 hours)**

Using Circle tools and uCreate, you will learn to set up and manage a simple cross-media campaign. This process starts with storyboarding the project, building and connecting the templates, and deploying XMPL language, followed by testing and analytics

Most topics require skills learned in Part I.

- **Part IV - Campaigns On Demand products in uStore (Allotted Time: not included)**

Learn how to make a cross-media product by adjusting a Circle project to be used as a Circle template with instances, incorporating campaign dials for product customization including instance IDs and project parameters.

Part IV's topics are out-of-scope for introductory training. If you need this product type, consider purchasing additional hours for future training. This training's requirements are all the above training sessions and current working experience with all products.

There is a lot of training material to cover in 40 hours (or five days onsite); we highly recommend all trainees (product users) perform some of the online tutorials before live training. This pre-training will allow more time to review basic/intermediate topics, include more Q&A, and provide time to discuss advanced features.

Should the outlined agenda above not meet your current training goals, please discuss changes with your instructor as soon as possible. Based on your training goals, the allotted times per topic are adjustable. Software features considered out-of-scope for introductory training sessions may require the purchase of additional training time.



Part I - Personalized Print

Allotted Time: 8-12 hours

The goal of these modules is to provide an introduction to XMPie, the solution purchased, and the software available. Hands-on training begins with building entry-level personalized documents. This material includes VDP concepts that lay the foundation for the modules that follow and for various implementations of personalization.

Beginner software skills learned in Part 1 modules are:

- uCreate Print (Adobe InDesign plug-in) template building
- uCreate Print Rule Editor and QLingo to implement business rules
- uProduce Server to generate print output production

Concept skills learned in Part 1 modules are:

- XMPie VDP Workflow and production
- Campaign Briefing (starting VDP)
- Content Tag (ADOR) creation and usage
- Business and Data rules using simple formulas (expressions)

Objectives	Duration	Audience
In-person training setup (if applicable) (Prior to training, when applicable) Your instructor will need some time to set up and check access to your uProduce server, printers, etc. Please refer to Required facilities and equipment .	.5 - 1 hour	instructor, training coordinator and/or network administrator

Objectives	Duration	Audience
<p data-bbox="155 201 737 237">Module 1 - Introduction and overview</p> <p data-bbox="155 270 894 386">This introductory module is a technical overview of XMPie software solutions, capabilities, and advantages for multi-channel marketing.</p> <p data-bbox="155 401 334 432">Module Goal:</p> <p data-bbox="155 436 826 506">Understand the PersonalEffect Full Suite solution, its possibilities, and training agenda review.</p> <p data-bbox="155 525 418 556">Learning Objectives:</p> <ul data-bbox="155 569 894 1003" style="list-style-type: none"> <li data-bbox="155 569 894 600">● Understand what topics will be covered during training. <li data-bbox="155 611 894 642">● Understand what XMPie products were purchased. <li data-bbox="155 653 894 684">● Understand XMPie and other industry terminology. <li data-bbox="155 695 894 726">● Understand the concepts of XMPie ADOR technology. <li data-bbox="155 737 894 884">● Concepts and screenshot of XMPie Software for <ul data-bbox="191 772 695 884" style="list-style-type: none"> <li data-bbox="191 772 695 804">» Variable Data Publishing (VDP), <li data-bbox="191 814 695 846">» Cross-Media (XM), and <li data-bbox="191 856 695 884">» Marketing Portals (Web-to-print, W2P) <li data-bbox="155 894 894 926">● Describe XMPie VDP, XM and W2P workflows. <li data-bbox="155 936 894 1003">● Review the tutorial files and other relative learning materials. 	<p data-bbox="963 201 1105 233">1 – 2 hours</p>	<p data-bbox="1157 201 1474 569">Anyone needing a general overview of the purchased software solution and components; wants to learn about new campaign possibilities or has questions about how the software works.</p>

Objectives	Duration	Audience
<p>Module 2 - Basic print campaign</p> <p>Digital and physical documents that are customized, personalized, or both begin with print templates that include data-driven business rules. Learning how to build a simple campaign is the best way to discover VDP concepts and gain an understanding to build upon in later sessions.</p> <p>Module Goal: Build a simple variable (VDP) template document using to uCreate Print functionality within InDesign.</p> <p>Learning Objectives:</p> <ul style="list-style-type: none"> ● Review campaign types, their planning, and requirements. ● Assess campaign goals (briefing) and prepare materials. ● Describe and use the XMPie uCreate Print panel. ● Build a VDP campaign from start to finish within the InDesign application. <ul style="list-style-type: none"> » Understand how the Content Tags' (ADOR) values are based on the linked data and business rule expressions. » Use the uCreate Print panel, and as needed related panels. » Create/modify various Content Tag (ADOR) types and rules. » Create/modify (plan) variables. Discuss why they are useful. » Create a template by placing Content Tags (ADOR) within the design. » Understand what is QLingo, use QLingo functions within the Rule Editor and the View QLingo dialog box. » Set the location of campaign Assets. » Use common dynamic text and graphic features. » Understand how design features affect 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 XMPie server. 	<p>4 - 8 hours</p>	<p>Mandatory:</p> <ul style="list-style-type: none"> ● Print designers who will create document templates. <p>Optional:</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).
<p>Related Campus Material uCreate Print Training video series > Project planning; uCreate Print Basics; uCreate Print Intermediate (some topics) https://campus.xmpie.com/eLearning/ucreate-print-training</p>		

Objectives	Duration	Audience
<p>Module 3 - Print production using uProduce</p> <p>PersonalEffect uProduce is a production server (environment) that allows for variable data output generation for print (and beyond). Learning the use of this application applies to print-only VDP campaigns and cross-media templates.</p> <p>Module Goal: Generate variable print output (PDF) from a dynamic print template and data with uProduce.</p> <p>Learning Objectives:</p> <ul style="list-style-type: none"> ● Describe and use the uProduce Dashboard. ● Create new users accounts, review other administrative tasks (users vs. admins). ● Create a new Account (containers for campaigns). ● Review and modify user permissions for Accounts. ● Review campaign components and containers. ● Create a CPKG (if this step has not already been done). ● Upload campaign components using XMPie packages. ● Discuss the server's data conversion of flat data sources. ● Replace components that have been modified. ● Create and use output destinations. ● Discuss print output features and options for various output formats. ● Save and modify production settings. ● Generate proof output, and print production. ● Review the output files using the Job Center. 	<p>~2 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>Optional:</p> <ul style="list-style-type: none"> ● Programmers who intend to use the PersonalEffect API to develop custom applications (if applicable).
<p>Related Campus Material uCreate Print Training video series > Working with the XMPie Servers (all topics except those with Circle) https://campus.xmpie.com/eLearning/ucreate-print-training</p>		

Part II - Web-to-Print/E-Commerce

Allotted time: ~12-16 hours

XMPie e-commerce solution provides flexibility and many features. The goal of these modules is to provide an introduction to the XMPie StoreFlow (or uStore) software solution. Hands-on training begins with experiencing a customer interface, working with the back office, setting up a new store with a few products, managing users and permissions, and testing to process orders.

Please make the instructor aware if you are new to implementing an e-commerce solution or have specific requirements. The instructor will adjust the learning objectives if necessary.

Beginner software skills learned in Part 2 modules are:

- Using a customer-facing store interface with basic functionality
- Overview of the uStore Back Office administrative interface with basic functionality
- Create and test a customer-facing store(s)
- Configure and test different store products*
- Review and discuss product properties, default pricing, product workflows
- Creating users, user groups, user group permissions, and store group permissions
- Review and discuss global presets and requirements
- Review and discuss how message templates are modified
- Review and discuss other store properties including, simple theme changes and other options
- Understanding and utilizing simple prepress workflows (if applicable)

Concept skills learned in Part 2 modules are:

- Requirements for new stores and products
- Requirements for product options and attributes (types, pricing, produce properties, etc.)
- Understanding settings or configurations at various levels (global, store, product)
- Differences between basic and advanced uStore functionality, features and integrations
- Differences between user groups and permissions
- Order management workflows and processing options
- Message management options and configurations
- FreeFlow Core workflow management (if applicable)

* Beyond one static product, the types and number of products created depend on your store's requirements, complexity, and training time allotted.

Objectives	Duration	Audience
<p>Module 4 - uStore introduction and walk-through</p> <p>Successful marketing portals start with an understanding of the end-user experience. Learning the out-of-the-box functionality provides a foundation to build your first</p> <p>Module Goal: Review terminology and experience an overview of the shopping experiences using a storefront to order different products and types.</p> <p>Learning Objectives:</p> <ul style="list-style-type: none"> ● Understand different store types and their purposes. ● Understand the customer experience using basic and advanced store interfaces. ● Practice ordering different types of products from a store. These steps will include login, user selections, purchasing, and viewing the user account profile. ● Review requirements for an e-commerce site based on store types. ● Review differences between basic stores vs. those that have expanded functionality. ● Review differences between basic product setups vs. those that have expanded functionality. 	1 - 2 hours	<p>Open to anyone that wants to understand the shopping experience.</p> <p>Stores used in this module are for demonstrative purposes only.</p>
<p>Related Campus Material</p> <p>XMPie StoreFlow Training video series > Customer Experience https://campus.xmpie.com/eLearning/xmpie-storeflow-training</p> <p>StoreFlow Tutorial (Piece of Cake) for v13.4 (or higher) > Modules 1-2, and Modules 3-4 highlights https://campus.xmpie.com/Tutorial/StoreFlow-Tutorial-Piece-of-Cake-for-v13.4</p>		

Objectives	Duration	Audience
<p>Module 5 - uStore back office intro (startup tasks)</p> <p>Back office preparation is essential for store functionality. This module will review the required initial global settings using the uStore back office.</p> <p>Module Goal: Use the administrative interface to prepare for the implementation of stores.</p> <p>Learning Objectives:</p> <ul style="list-style-type: none"> ● Understand and use the back office (uStoreAdmin) interface as an administrative user. ● Create administrative users and understand their permissions. ● Discuss required presets and their importance. <ul style="list-style-type: none"> » Review uProduce users for uStore stores and configure this connection preset. » Discuss and implement (if applicable) language/culture localization presets and why this is important. » Discuss Global product properties preset, what is needed and best practices. 	<p>.5 - 1 hour</p>	<p>Mandatory:</p> <ul style="list-style-type: none"> ● Those implementing and managing stores and products <p>Optional:</p> <ul style="list-style-type: none"> ● Programmers who intend to use uStore APIs to develop custom applications (if applicable).
<p>Related Campus Material</p> <p>XMPie StoreFlow Training video series > Initial uStore admin settings https://campus.xmpie.com/eLearning/xmpie-storeflow-training</p> <p>StoreFlow Tutorial (Piece of Cake) for v13.4 (or higher) > Modules 3 (highlights) and Module 4, https://campus.xmpie.com/Tutorial/StoreFlow-Tutorial-Piece-of-Cake-for-v13.4</p>		

Objectives	Duration	Audience
<p>Module 6 - Basic store startup</p> <p>Configuring a basic store will lay the groundwork for testing new stores used during training and in the future.</p> <p>Module Goal: Use the administrative interface to create a new store and review store settings.</p> <p>Learning Objectives:</p> <ul style="list-style-type: none"> ● Review requirements for a new store and its products. ● Create a new store and review or modify its settings. ● Understand localization and other cultural settings. ● Discuss and enable (if applicable) store Friendly-URLs. ● Make simple changes to the store's look and feel (theme). ● Review the differences between global and store settings. 	<p>1 - 2 hours</p>	<p>Mandatory:</p> <ul style="list-style-type: none"> ● Those implementing and managing stores and products <p>Optional:</p> <ul style="list-style-type: none"> ● Marketing or business managers, ● Programmers using APIs
<p>Related Campus Material</p> <p>XMPie StoreFlow Training video series > Initial uStore admin settings, Making changes to your stores, uStore NG Theme (Intro only) https://campus.xmpie.com/eLearning/xmpie-storeflow-training</p> <p>StoreFlow Tutorial (Piece of Cake) for v13.4 (or higher) > Module 5, Module 18 (Customizing the store theme) https://campus.xmpie.com/Tutorial/StoreFlow-Tutorial-Piece-of-Cake-for-v13.4</p>		

Objectives	Duration	Audience
<p>Module 7 - Static product setup</p> <p>Your stores may have different types of products. To review the basics needed for every product, you will start with a Static Product, providing a foundation for implementing any product type.</p> <p>Module Goal: Set up product group(s), a static product, and implement product requirements.</p> <p>Learning Objectives:</p> <ul style="list-style-type: none"> ● Understand the differences between store products types. ● Create and modify product groups (aka categories). ● Create and modify one or more static store products. ● Discuss and implement product properties, pricing, prepress, and other product options. ● Discuss or create a new product through duplication. ● Review Global Product Property preset. ● Discuss (and, if needed, create and modify) Product Profiles. 	<p>2 - 3 hours</p>	<p>Mandatory:</p> <ul style="list-style-type: none"> ● Those implementing and managing stores and products <p>Optional:</p> <ul style="list-style-type: none"> ● Marketing or business managers who set the rules for changing the document design based on data values, ● Programmers who intend to use APIs to develop custom applications (if applicable).
<p>Related Campus Material</p> <p>XMPie StoreFlow Training video series > Creating and editing product groups, Adding static products, Creating and managing product profiles, https://campus.xmpie.com/eLearning/xmpie-storeflow-training</p> <p>StoreFlow Tutorial (Piece of Cake) for v13.4 (or higher) > Module 5, Module 4 (some topics) https://campus.xmpie.com/Tutorial/StoreFlow-Tutorial-Piece-of-Cake-for-v13.4</p>		

Objectives	Duration	Audience
<p>Module 8 - Testing products and processing orders</p> <p>Testing a store is an ongoing process, starting when you create new products, and should be addressed regularly (not just by your customers). This process includes accessing your store, checking the functionality of ordering products, checking out, other customer-related activities, and back-office requirements.</p> <p>Module Goal: Place one or more orders in the customer interface, then process those orders in the administrative interface.</p> <p>Learning Objectives:</p> <ul style="list-style-type: none"> ● Access the store through a browser. ● Access the store through the administrative interface. ● Order a product and note any required fixes. ● Modify the product, if needed, then order again. ● Note how changing settings affect the product ordering process. (e.g. required vs. optional properties) ● Review order queues and how orders are processed. ● Process orders into production. ● Discuss how Triggers can help with automation. 	1 hour	<p>Mandatory:</p> <ul style="list-style-type: none"> ● Those implementing and managing stores and products
<p>Related Campus Material</p> <p>XMPie StoreFlow Training video series > (these videos are in the process of being updated) https://campus.xmpie.com/eLearning/xmpie-storeflow-training</p> <p>StoreFlow Tutorial (Piece of Cake) for v13.4 (or higher) > Module 16, https://campus.xmpie.com/Tutorial/StoreFlow-Tutorial-Piece-of-Cake-for-v13.4</p>		

Objectives	Duration	Audience
<p>Module 9 - More uStore Back Office tasks</p> <p>Understanding products give perspective to several administrative tasks you need to consider. Some settings are per store, whereas global settings (Presets) affect all stores. Completing these tasks will save you time.</p> <p>Other uStore administrative tasks, such as working with User/Group permissions and approval processes, should be completed in the early stages of store development.</p> <p>Module Goal: Review, discuss and implement global settings, user permissions, and other store requirements.</p> <p>Learning Objectives:</p> <ul style="list-style-type: none"> ● Create users, user groups, and group permissions. ● Implement user group permissions for product groups. ● Discuss or implement (if applicable) a simple order approval setup. ● Discuss or generate coupons discounts for a given store. ● Discuss or create and use clearing methods. ● Discuss, create or modify Global Product Properties. ● Discuss implementation of external databases. ● Discuss email templates used for messaging. ● Discuss how other presets affect stores. ● Discuss or implement Product Profiles (as needed). ● Discuss or implement Triggers to set up automation. ● Generate predefined reports. 	<p>2 - 3 hours</p>	<p>Mandatory:</p> <ul style="list-style-type: none"> ● Those implementing and managing uStore stores and products <p>Optional:</p> <ul style="list-style-type: none"> ● Marketing or business managers who set the rules for changing the document design based on data values, ● Programmers who intend to use APIs to develop custom applications (if applicable)
<p>Related Campus Material</p> <p>XMPie StoreFlow Training video series > Initial Store admin settings, Managing Users and Groups, Creating and managing product profiles https://campus.xmpie.com/eLearning/xmpie-storeflow-training</p> <p>StoreFlow Tutorial (Piece of Cake) for v13.4 (or higher) > Module 4, Module 18 (some topics) https://campus.xmpie.com/Tutorial/StoreFlow-Tutorial-Piece-of-Cake-for-v13.4</p>		

Objectives	Duration	Audience
<p>Module 10 - Dynamic product overview</p> <p>Dynamic products (aka customizable print-on-demand) set up in uStore require adjustments to their associated VDP template campaigns. These changes lead to new or modified business rules and campaign dials.</p> <p>Module Goal: Define changes, as needed, to a variable template design and business rules to use as the base of a dynamic product.</p> <p>Learning Objectives:</p> <ul style="list-style-type: none"> ● Discuss what variable template will be used for a dynamic product. ● Review product setup requirements and discuss how this changes the business rules of the template's campaign. ● Gather or create necessary resources for the dynamic product. ● Document changes to a current VDP campaign. ● Discuss designing for uEdit customization and how that works with and differs from XLIM functionality. <p>Side Note: this session could be incorporated with Module 2 during campaign briefing where necessary.</p>	<p>.5 - 1 hour</p>	<p>Mandatory:</p> <ul style="list-style-type: none"> ● Those implementing and managing uStore stores and products ● Print designers who will create document templates. <p>Optional:</p> <ul style="list-style-type: none"> ● Marketing or business managers who set the rules for changing the document design based on data values, ● Programmers who intend to use APIs to develop custom applications (if applicable).
<p>Related Campus Material</p> <p>XMPie StoreFlow Training video series > Creating dynamic product templates https://campus.xmpie.com/eLearning/xmpie-storeflow-training</p> <p>StoreFlow Tutorial (Piece of Cake) for v13.4 (or higher) > Module 8 https://campus.xmpie.com/Tutorial/StoreFlow-Tutorial-Piece-of-Cake-for-v13.4</p>		

Objectives	Duration	Audience
<p>Module 11 - Basic VDP-W2P campaigns</p> <p>(part 1 - template creation)</p> <p>The first part of setting up a dynamic product is creating the variable design template and ensuring the business rules will work with the customization settings in the store. This process includes creating campaign dials and often uses variables (internal to the plan) as placeholders for the customization values used to control content.</p> <p>Module Goal: Implement the desired changes to a current template or build a new template (chosen in the previous module) and prepare template production.</p> <p>Learning Objectives:</p> <ul style="list-style-type: none"> ● Open the template or start a new document. ● Implement new Content Tags (ADOR) as needed. ● Add required internal variables to use as placeholders. ● Set campaign dials for customization. ● Discuss and test different values for dials. ● Save the template to the server. ● Prepare the template to use as a product by proofing and processing output. 	<p>1 - 2 hours</p>	<p>Mandatory:</p> <ul style="list-style-type: none"> ● Those implementing and managing uStore stores and products ● Print designers who will create document templates. <p>Optional:</p> <ul style="list-style-type: none"> ● Marketing or business managers who set the rules for changing the document design based on data values, ● Programmers who intend to use APIs to develop custom applications (if applicable).
<p>Related Campus Material</p> <p>XMPie StoreFlow Training video series > Creating dynamic product templates https://campus.xmpie.com/eLearning/xmpie-storeflow-training</p> <p>StoreFlow Tutorial (Piece of Cake) for v13.4 (or higher) > Module 8 https://campus.xmpie.com/Tutorial/StoreFlow-Tutorial-Piece-of-Cake-for-v13.4</p>		

Objectives	Duration	Audience
<p>Module 12 - Basic VDP-W2P campaigns</p> <p>(part 2 - product setup)</p> <p>There are a few differences between setting up a static product and a dynamic one, the most notable is the customization step. Shopper customization inputs (dial setup) requirements were decided during previous modules and may work in conjunction with the editor. Using the editor, uEdit, to customize the product requires an XLIM document and will be reviewed as needed. Typically pricing is based on the number of personalized items and their mailing or shipping cost.</p> <p>Module Goal: Implement a dynamic product that allows for customization and the use of a recipient data source.</p> <p>Learning Objectives:</p> <ul style="list-style-type: none"> ● Review previous modules and product requirements. ● Verify that the store can access the dynamic template on the production server. ● Add a new Dynamic Document product. ● Review and implement, as needed, product properties, prepress workflows, and other product options. ● Review and configure customization input and validation options for campaign dials. ● Review and configure recipient data set up and options. ● Review and configure, as needed, uEdit set up. ● Test new products and place orders. ● Make adjustments to the product set up, if needed. ● Other template modifications (design or business rules), if needed, will be noted and implemented in the following module. 	<p>1 - 1.5 hours</p>	<p>Mandatory:</p> <ul style="list-style-type: none"> ● Those implementing and managing uStore stores and products ● Print Designers who will create document templates. <p>Optional:</p> <ul style="list-style-type: none"> ● Database users; those 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 APIs to develop custom applications (if applicable).
<p>Related Campus Material</p> <p>XMPie StoreFlow Training video series > Adding dynamic products https://campus.xmpie.com/eLearning/xmpie-storeflow-training StoreFlow Tutorial (Piece of Cake) for v13.4 (or higher) > Module 9 https://campus.xmpie.com/Tutorial/StoreFlow-Tutorial-Piece-of-Cake-for-v13.4</p>		

Objectives	Duration	Audience
<p>Module 13- Making changes to VDP-W2P product</p> <p>Updating Dynamic products often require modifications to their business rules, designs, or both. Rather than replacing these products, you can make simple adjustments while the product is offline.</p> <p>Module Goal: Update a live dynamic product by taking it offline and modifying its production template and business rules.</p> <p>Learning Objectives:</p> <ul style="list-style-type: none"> ● Review the changes needed to the product that require modifying the design, business rules, or both. ● Take the product offline. ● Review the workflow of opening the template from the server vs. using the template from a file system (local or network drives, CPKG, DPKG, or INDD). ● Open the document template from the server (most convenient), package files (import), or local drive. ● Implement the required changes to the template. ● Save the document template to the server, or create package files to place on the server. ● Review when uStore requires a new proof or process from an updated template. ● Generate a proof and process job using the server or the connectivity feature. ● Modify the product's customization steps as necessary. ● Place the product online and test the changes and new functionality. ● Review Back Office procedures for processing dynamic products through the system. 	<p>2 - 4 hours</p>	<p>Mandatory:</p> <ul style="list-style-type: none"> ● Those implementing and managing uStore stores and products ● Database users; those who work with data sources and build the business logic based campaign requirements. ● Print Designers who will create document templates. <p>Optional:</p> <ul style="list-style-type: none"> ● Marketing or business managers who set the rules for changing the document design based on data values, ● Programmers who intend to use the PersonalEffect API to develop custom applications (if applicable).
<p>Related Campus Material</p> <p>XMPie StoreFlow Training video series > (coming soon) https://campus.xmpie.com/eLearning/xmpie-storeflow-training</p> <p>StoreFlow Tutorial (Piece of Cake) for v13.4 (or higher) > Module 11 https://campus.xmpie.com/Tutorial/StoreFlow-Tutorial-Piece-of-Cake-for-v13.4</p>		

Objectives	Duration	Audience
<p>Module 14- Adding other product types</p> <p>Besides dynamic and static products, uStore has several other types of available products. As needed, and if training time is available, the instructor can walk through creating another product type or revisit creating a static or dynamic product.</p> <p>Module Goal: Review and create a new product for the store.</p> <p>Learning Objectives:</p> <ul style="list-style-type: none"> ● Review requirements for each of the other product types. ● Collect the required items for a new product. ● Review and implement, as needed, product properties, prepress workflows, components, customizations, and other product options. ● Test the new product, place orders, and process queues. 	0 - 3+ hours	
<p>Related Campus Material</p> <p>XMPie StoreFlow Training video series > Topics covering Composite, 3D or Kit products https://campus.xmpie.com/eLearning/xmpie-storeflow-training</p> <p>StoreFlow Tutorial (Piece of Cake) for v13.4 (or higher) > Modules 12, 13, 14, 15 https://campus.xmpie.com/Tutorial/StoreFlow-Tutorial-Piece-of-Cake-for-v13.4</p>		

Objectives	Duration	Audience
<p>Module 15 - Simple FreeFlow Core workflow</p> <p>Processing orders often generates a document that may need some prepress work before it is press-ready. As required and if training time is available, the instructor can demonstrate how to create a simple prepress workflow using FreeFlow Core.</p> <p>Module Goal: Create a simple prepress workflow to use with a product.</p> <p>Learning Objectives:</p> <ul style="list-style-type: none"> ● Review accessing FreeFlow Core as an administrator or operator. ● Review the FreeFlow Core interface (if not already completed). ● Review the available FreeFlow Core components. ● Plan a new workflow to use with a current product. ● Create and save a new workflow using current presets. ● Test the new workflow. ● Assign the new workflow to a product in uStore. ● Test the product's processing through the Prepress Queues. 	0 - 1 hour	
<p>Related Campus Material</p> <p>XMPie StoreFlow Training video series > Composite, 3D or Kit products https://campus.xmpie.com/eLearning/xmpie-storeflow-training</p> <p>FreeFlow Core Overview https://campus.xmpie.com/eLearning/FreeFlow-Core-Overview</p> <p>FreeFlow Core Tutorial https://campus.xmpie.com/Tutorial/FreeFlow-Core-v5-Tutorial</p> <p>StoreFlow Tutorial (Piece of Cake) for v13.4 (or higher) > Modules 12, 13, 14, 15 https://campus.xmpie.com/Tutorial/StoreFlow-Tutorial-Piece-of-Cake-for-v13.4</p>		

Part III - TransMedia

Allotted Time: 12-16 hours

We created the XMPie Open XM technology stack to handle multi-channel, personalized communication projects. These campaign projects may include any combination of dynamic templates for websites, emails, SMS (text messages), print, and more.

For example, consider an event where the attendee received each of these personalized communications or related campaign touchpoints:

- a printed invite to RSVP on their website,
- a reminder email to RSVP (if they need one),
- a confirmation email with a link to add the event to their calendar,
- an SMS reminder the day before the event (if they asked for one),
- a printed and emailed event schedule,
- a printed thank you for attending gift,
- a thank you or follow-up email after the event,
- and the list could go on.

These projects start within the Circle, a collaborative environment used to define a campaign's lifecycle storyboard. The story continues with individual campaign communications (touchpoints) connecting to their respective dynamic production templates and analytics.

The campaign project may start in Circle; however, you will use all the XMPie tools you've learned to build the campaign components, including a new webpage language called XMPL (on the XMPL server).

PersonalEffect TransMedia implements an XMPL server that allows web designers and developers the flexibility to use any webpage editing software to program or host personalized pages.

During these modules, an introduction to multi-channel campaigns concepts and requirements, followed by simple project implementation. You will use InDesign and uCreate to create print templates, uPlan (as needed) to work with data and to build business rules, Dreamweaver (or a similar application) to develop websites, and Circle's the built-in email editor to generate multipart emails.

Note: Your instructor will use our XMPL code and cannot be responsible for troubleshooting all HTML/XHTML, CSS, or other various web scripts 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.

Objectives	Duration	Audience
<p>Module 16 - Campaign planning and resource setup</p> <p>Multi-channel communications require planning, starting with an outline and a storyboard of each communication touchpoint and how they interact with other touchpoints. Collecting resources (sample data, print/web/email templates, design mockups) and adding project notes can enhance understanding of this campaign and its goals.</p> <p>Module Goal: Use Circle's planning mode to storyboard a new cross-media campaign or project to share with reviewers.</p> <p>Learning Objectives:</p> <ul style="list-style-type: none"> ● Understand the Circle interface by reviewing a current project. ● Review the differences between projects, templates, instances, and flow patterns. ● Use Circle to create and modify projects. ● Storyboard a campaign using different types of nodes (touchpoints, enhancers, and actions). ● Add design mockups, notations, and enhancers to detail the project. ● Understand ways to share projects. ● Invite Reviewers (if applicable) and other collaborators to view the project. ● Post and read comments. ● Review campaign requirements and collect related materials needed to implement the campaign. 	<p>2 - 2.5 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>Optional:</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>Related Campus Material</p> <p>Cross-Media Tutorial for v11 PersonalEffect > Modules 1 and 2 https://campus.xmpie.com/Tutorial/Cross-Media-Tutorial-for-v11-PersonalEffect</p> <p>Circle and Cross-Media Training video series > Planning your campaign in Circle https://campus.xmpie.com/eLearning/Circle-Training-Videos</p>		

Objectives	Duration	Audience
<p>Module 17 - Creating the campaign logic</p> <p>When the business rules for a given cross-media campaign are not overly complex, you can start your cross-media campaign by using uCreate and its rule editor within InDesign. This plug-in allows the VDP designer to add Content Tags (ADOR) you typically use with webpage or email templates and those your print templates need.</p> <p>There will be times when implementing complex rules is required. A suggested best practice for those times is to use uPlan, especially within a collaborative environment (designers + data programmers).</p> <p>Module Goal: Build cross-media business rules, place variable content into the InDesign (or XLIM) template, and create a CPKG (campaign package) file to use when connecting the Circle project.</p> <p>Learning Objectives:</p> <p>Method 1: Prepare a CPKG (using uCreate)</p> <ul style="list-style-type: none"> ● Review the campaign requirements outlined in the previous module. ● Open the initial print template, link the data source, build the required Content Tag (ADOR) rules, and tag the document. ● Review required Content Tags (ADOR) ● Review saving the campaign, at this stage, to save as an InDesign or XLIM campaign package file. If needed, discuss what components are within a CPKG file. <p>If uPlan is required, this module will require additional time.</p> <p>Method 2: uPlan and preparing campaign components</p> <ul style="list-style-type: none"> ● Use and review uPlan to generate rules (plan). <ul style="list-style-type: none"> » Create new and modify existing plan files based on requirements. » Save the plan and generate proofsets. ● Discuss and use one option for getting started in project: <ul style="list-style-type: none"> » 1) Generate a CPKG (from uCreate) or » 2) Use plan file and » Connect templates (dPKG, zip, etc.) to the project 	<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>Optional:</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.
<p>Related Campus Material Cross-Media Tutorial for v11 PersonalEffect > Modules 3 (without uPlan), Module 3a (with uPlan) https://campus.xmpie.com/Tutorial/Cross-Media-Tutorial-for-v11-PersonalEffect</p>		

Activity	Duration	Audience
<p>Module 18 - Circle project component connections</p> <p>For variable production, a campaign's components are stored and connected to the uProduce server. Known as building mode, Circle manages the connection to the documents in the uProduce and XMPL servers.</p> <p>Module Goal: Connect a Circle project using the files created in the previous module.</p> <p>Learning Objectives:</p> <ul style="list-style-type: none"> ● Understand the differences connecting a project via data (easy start), a plan, or a campaign package (CPKG). ● Connect a project using a CPKG or Plan File. ● Use the database wizard to update the data and the plan file. ● Understand what the wizard is doing and why. ● Review the project library, sample recipients, and other starting management tasks. 	<p>2 - 3 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>Optional:</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>Related Campus Material</p> <p>Cross-Media Tutorial for v11 PersonalEffect > Modules 4 (without uPlan), Module 3b (with uPlan) https://campus.xmpie.com/Tutorial/Cross-Media-Tutorial-for-v11-PersonalEffect</p> <p>Circle and Cross-Media Training video series > Building your campaign in Circle (Using CPKG or Plan) https://campus.xmpie.com/eLearning/Circle-Training-Videos</p>		

Activity	Duration	Audience
<p>Module 19 - Creating email documents</p> <p>Mass and triggered email touchpoints require settings for scheduling, event-based filtering for automation (if applicable), and template setup. Circle's email editor allows the creation of new emails or modifying uploaded HTML to incorporate XMPL code (tags and tracking).</p> <p>This module also provides an introduction to the XMPL language used for personalizing emails and webpages.</p> <p>Module Goal: Create and modify email templates to include Content Tags (ADOR) and configure their touchpoints.</p> <p>Learning Objectives:</p> <ul style="list-style-type: none"> ● Configure email touchpoints and their settings. ● Review Circle's email editor interface. ● Use the Email editor to create and modify an email. ● Upload and modify (as needed) an email HTML and its related files (via a zipped file that contains XMPL or not). ● Describe the differences between Mass email and Triggered email setups. ● If applicable, test the email production. 	<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>Optional:</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>Related Campus Material</p> <p>Cross-Media Tutorial for v11 PersonalEffect > Modules 5 https://campus.xmpie.com/Tutorial/Cross-Media-Tutorial-for-v11-PersonalEffect</p> <p>Circle and Cross-Media Training video series > Creating personalized emails) https://campus.xmpie.com/eLearning/Circle-Training-Videos</p>		

Activity	Duration	Audience
<p>Module 20 - Creating the personalized website</p> <p>Using XMPie's XMPL (language), you can link to a campaign and delivery personalized content on a website (locally hosted on the XMPL server or remotely on any corporate website). In addition to displaying dynamic values, web forms can submit modifications to update campaign data via this two-way communication port the XMPL server provides.</p> <p>Module Goal: Expand and use XMPL (language) with a locally hosted (managed website) to incorporate personalized data and provide a web form to update a recipient's data.</p> <p>Learning Objectives:</p> <ul style="list-style-type: none"> ● Use Circle to set up a managed web site. ● Discuss or review personalized response web sites basics: <ul style="list-style-type: none"> » Automated tracking for websites » Physical folders, IIS virtual folders, and the differences between published and testing » How Helicon's ISAPIRewrite performs redirection and their related special Content Tags (ADOR) and functions » XMPL code, where to find the code, and what you can do with this information to build upon its functionality ● Set up a local website for testing and (if possible) create a connection to the XMPL server. ● Add the required XMPL code to generate various personalized content on a webpage (text, graphic, etc.). ● Configure a web form to submit updated personalized data, trigger a personalized email touchpoint and direct to another webpage. ● Implement (if possible) a friendly URL for the website touchpoint. ● Test new websites using sample recipients. ● If time allows, discuss or implement error handling, social media tags, or other types of pages and forms, etc. 	<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>Optional:</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>Related Campus Material</p> <p>Cross-Media Tutorial for v11 PersonalEffect > Modules 6 https://campus.xmpie.com/Tutorial/Cross-Media-Tutorial-for-v11-PersonalEffect</p> <p>Circle and Cross-Media Training video series > Creating personalized webpages https://campus.xmpie.com/eLearning/Circle-Training-Videos</p>		

Activity	Duration	Audience
<p>Module 21 - Additional Personalized Print Tasks</p> <p>In addition to incorporating a print document that provides an easy way to launch the personalized site (via a QR Code), adding on-demand, personalized PDF production (printed or not) creates a well-rounded cross-media campaign project.</p> <p>Module Goal: Complete printing tasks by adding a quick response (QR) barcode, generating output, and creating a document for a PDF On-Demand touchpoint.</p> <p>Learning Objectives:</p> <ul style="list-style-type: none"> ● Using connectivity between uCreate and uProduce. ● Add to the print invite, a personalized QR code containing personalized landing page link. ● Generate print from the Circle project. ● Review scheduling and (if applicable) filtering data . ● Using the Run Center. ● Add another personalized print document to the project. ● Setting up PDF onDemand links in emails and webpages. ● If time allows, discuss branding the PDF On Demand status window. 	<p>1.5 -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>Optional:</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>Related Campus Material</p> <p>Cross-Media Tutorial for v11 PersonalEffect > Modules 7, 8 and 9 https://campus.xmpie.com/Tutorial/Cross-Media-Tutorial-for-v11-PersonalEffect</p> <p>Circle and Cross-Media Training video series > Creating personalized print https://campus.xmpie.com/eLearning/Circle-Training-Videos</p>		

Activity	Duration	Audience
<p>Module 22 - Circle Analytics</p> <p>Measuring the effectiveness of a cross-media campaign by tracking and showing that tracked information on your project's touchpoints helps establish what works and where improvements are needed. Using Circle Analytics during and at the end of a campaign is essential.</p> <p>Module Goal: Review scheduling, using filters (if applicable) and using the analyze tab and share it with those who do not have Circle access.</p> <p>Learning Objectives:</p> <ul style="list-style-type: none"> ● Review the Analyze (Circle tab) ● Review and discuss various KPI and other charts <ul style="list-style-type: none"> » Web and Landing over time » Email open and click through » Call to action (:CTA) for tracked actions » Print reports » SMS (if applicable) ● Use List report ● Review Print reports ● Review other options (as applicable) 	<p>.5 -1 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>Optional:</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>Related Campus Material</p> <p>Cross-Media Tutorial for v11 PersonalEffect > Modules 11 https://campus.xmpie.com/Tutorial/Cross-Media-Tutorial-for-v11-PersonalEffect</p> <p>Circle and Cross-Media Training video series > Creating personalized webpages (last video) https://campus.xmpie.com/eLearning/Circle-Training-Videos</p>		



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*

		Duration (hours)	PE Variable Data Print Training	PE TransMedia Training	PE Web-to-Print Training	PE Full Suite Introduction	PE Full Suite Advanced
Course Modules	Introduction and overview	20	✓	✓	✓	✓	✓
	Basic print campaign using uCreate	20	✓	✓	✓	✓	✓
	Print production on the uProduce server	20	✓	✓	✓	✓	✓
	Campaign logic with uPlan (time permitting)	32	◆	✓	◆	✓	✓
	Creating cross-media campaigns using OpenXM tools	32†		✓		✓	✓
	Circle and Circle Analytics	32†		✓		✓	✓
	uStore - web to print/marketing portals	40			✓	✓	✓
	FreeFlow Core Basics	80‡			✓	✓	□
	uImage introduction		□	✓	□	□	□
	uChart introduction		□	□	□	□	□
	Brief, high-level overview of API web services		□	□	□	□	□
	Advanced campaign logic using uPlan		□	□	□	□	□
	Additional uStore products and features		□	□	□	□	□
	XM Campaign or other advanced uStore products		□	□	□	□	□

* Topic inclusion depends on allotted time and purchased products. If optional items are required, you may need to purchase additional training time. Please work with your sales rep and instructor to determine the necessary time.

† PE Web-to-Print Training 24-hour (3-day) reduced topic training schedule is available when necessary.

‡ For the Advanced PersonalEffect Full Suite Training, we recommend splitting the 80-hour (10-day) training into two or three goal-oriented events with at least 2 to 4 weeks between events. This split will allow participants more hands-on time with the software before starting the next phase of your project(s).

Online 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, Course Agenda, and materials required. Don't hesitate to contact 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

- » <https://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 join@xmcircle.com for information.
- » <https://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.
- » <https://campus.xmpie.com> - XMPie Campus, our e-learning and training hub for current XMPie Customers.
- » <https://info.xmpie.com> - XMPie Information Portal with access to additional case studies, presentations, and much more.
- » <https://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...

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

Circle, XMPL and uStore

- » <https://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.

