

PE Transmedia Training

Variable Data Printing (VDP), and
TransMedia (CROSS-MEDIA)

Customer Expectation Document
Instruction-led Sessions (32 hours)

Created for the following software bundles:

**PE TransMedia, PE Transmedia Pro
or Enterprise Cross-Media**

Multi-channel customer communication (CCM),
and server-based variable data print (VDP) campaign solutions

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

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one to one in one™

A CAREAR Company



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About this document

The purpose of this document is to set clear expectations and recommendations prior to training in XMPie PersonalEffect® (PE) TransMedia. Training is an investment, so we want to provide maximum value to your organization by ensuring that the experience is engaging and successful for participants and that there is maximal transfer of knowledge and information into your company. This document aims to outline what is needed to achieve this goal, together with 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.

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

Hands-on training starts after the Overview, and all those using the software should attend these training sessions.



About XMPie PersonalEffect & Training

PersonalEffect (PE) TransMedia and Enterprise Cross Media consist of several integrated software products that support high-volume VDP output, personalizing websites, emails, SMS, and more.

We recommend PE TransMedia training when you have purchased one of the following configuration packages (or bundles):

- PersonalEffect TransMedia
- PersonalEffect TransMedia Pro
- Enterprise Cross Media

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

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 built-in 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.

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.

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 TransMedia Training typically includes discussions about all products, emphasizing the software needed to build print and cross-media campaigns. The general, 32-hour (or 4-day) training goal is to review all the software you've purchased as time allows.



Course overview

This course provides introductory training on the latest version of XMPie PersonalEffect 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), TransMedia communications, and why each is an essential tool for today's marketers and print service providers. A short review of cross-media campaigns examples 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 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 II)

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 (32 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 four consecutive days. 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 TransMedia suite 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)
- 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,
- 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:

- 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 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.

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 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		
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 - TransMedia (XM/CROSS-MEDIA) (Allotted Time: 20+ 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.

There is a lot of training material to cover in 32 hours (or four 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="152 197 735 233">Module 1 - Introduction and overview</p> <p data-bbox="152 268 893 386">This introductory module is a technical overview of XMPie software solutions, capabilities, and advantages for multi-channel marketing.</p> <p data-bbox="152 401 331 432">Module Goal:</p> <p data-bbox="152 436 857 506">Understand the PersonalEffect TransMedia solution, its possibilities, and training agenda review.</p> <p data-bbox="152 522 418 556">Learning Objectives:</p> <ul data-bbox="152 567 893 966" style="list-style-type: none"> ● Understand what topics will be covered during training. ● Understand what XMPie products were purchased. ● Understand XMPie and other industry terminology. ● Understand the concepts of XMPie ADOR technology. ● Concepts and screenshot of XMPie Software for <ul style="list-style-type: none"> » Variable Data Publishing (VDP), » Cross-Media (XM) ● Describe XMPie VDP, XM and W2P workflows. ● Review the tutorial files and other relative learning materials. 	<p data-bbox="961 197 1105 233">1 – 2 hours</p>	<p data-bbox="1148 197 1466 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>		

Objectives	Duration	Audience
<p>Module 4 - ulmage Introduction</p> <p>Generating personalized imagery captures a recipient's attention and promotes customer stickiness. People are more likely to keep art (postcards to calendars) that contain their names, often for years. Adding this feature to your print and cross-media campaigns will increase responsiveness.</p> <p>Module Goal: Build a simple personalized ulmage template in Photoshop, then add this special graphic Content Tag (ADOR) to your VDP templates.</p> <p>Learning Objectives:</p> <ul style="list-style-type: none"> ● Review the different types of ulmage templates. ● Review the XMPie Marketplace for template ideas and samples of templates. ● Create a "regular" font-based ulmage template using Photoshop. ● Export a DPKG (document package) from Photoshop to use within a variable print template. ● With uCreate Print's Rule Editor, add the ulmage function to a Graphic Content Tag (ADOR) and preview records. ● Export the files to run production on the XMPie server. <p>Optional Objectives (if time permits):</p> <ul style="list-style-type: none"> ● Create a "seperated letters" font-based ulmage template using Photoshop and test using this template in a print design. ● Review "image font" (graphic-based) ulmage template creation and how its print production works. ● Review how ulmage templates work on a personalized web page. (Or revisit this task after cross-media training.) 	<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 ulmage https://campus.xmpie.com/eLearning/ucreate-print-training</p>		

Part II - TransMedia

Allotted Time: 20+ 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 5 - 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 - 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.
<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 6 - 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 7 - 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 - 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 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 8 - 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 9 - 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 - 6 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 10 - 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>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 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 11 - 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>~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*

		PE Variable Data Print Training	PE TransMedia Training	PE Web-to-Print Training	PE Full Suite Introduction	PE Full Suite Advanced
Duration (hours)		20	32	32†	40	80‡
Course Modules	Introduction and overview	✓	✓	✓	✓	✓
	Basic print campaign using uCreate	✓	✓	✓	✓	✓
	Print production on the uProduce server	✓	✓	✓	✓	✓
	Campaign logic with uPlan (time permitting)	◆	✓	◆	✓	✓
	Creating cross-media campaigns using OpenXM tools		✓		✓	✓
	Circle and Circle Analytics		✓		✓	✓
	uStore - web to print/marketing portals			✓	✓	✓
	FreeFlow Core Basics			✓	✓	□
	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.

