

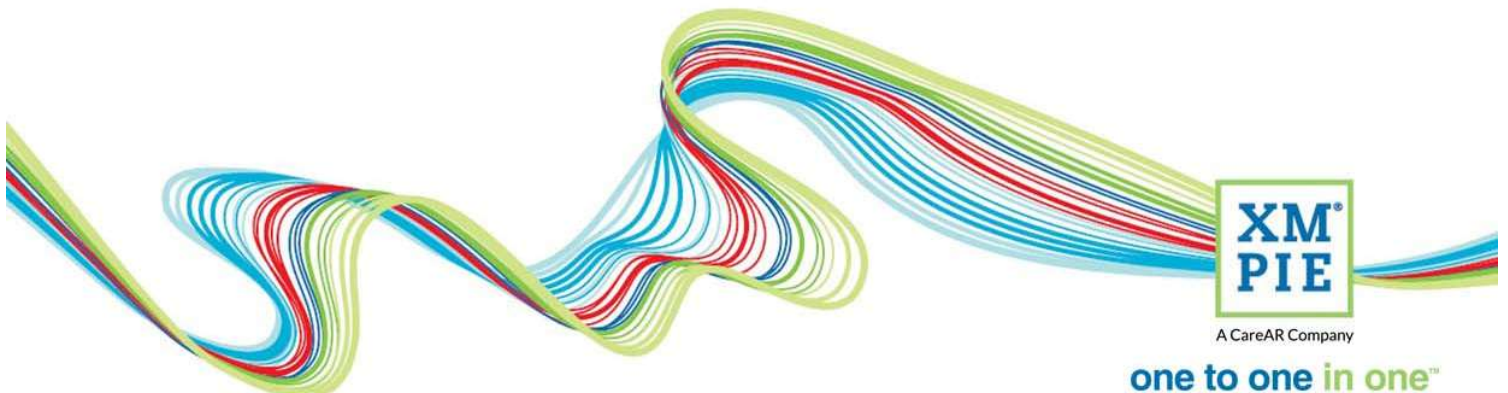
uCreate Print Training

Transcript for: TUTORAL 1 – Project planning

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Notices

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JP Patent 4406364B and pending patents.

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Voice over script

Hi! Welcome to the XMPie uCreate Print training.

This is the first tutorial in the series during which will create a fully variable dynamic document using uCreate Print and InDesign.

Our sample project is a self-mailer invitation for prospective students to attend the EDU University open day.

The purpose of this first tutorial is to download and explore the tutorial files, as well as to understand the customer brief and what we need to do.

I will approach this like a real-world customer job so you can see some of the things you might need to check and plan for in your future VDP projects.

To start, download the resources zip file.

There is a PDF included in the ZIP file that will go into more detail.

You can read the document later at your leisure, but I will use this diagram to talk about the customer's requirements.

Generally, I want to get an idea of what is changing in the document in terms of text, images or object visibility in this case. And importantly, what is going to trigger the change.

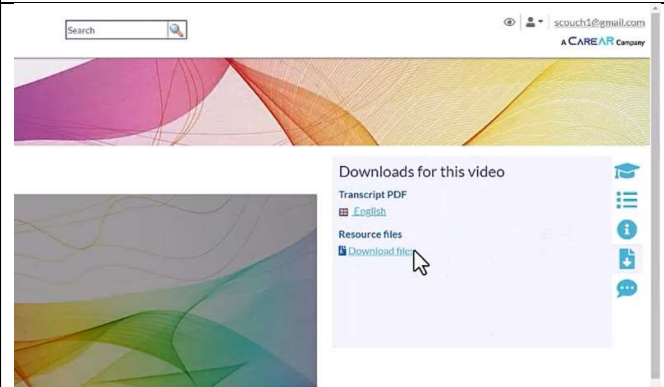
For example, these objects all change based on the School the student is interested in attending, and this one changes based on the student's Grade Average.

Understanding what changes will help you identify and gather all the right asset materials – the School images for example.

And understanding what triggers the change will point you toward checking the data to ensure that you have the required information, that it is consistent and in a format you can use.

So, let's start by looking at the data.

Thumbnail



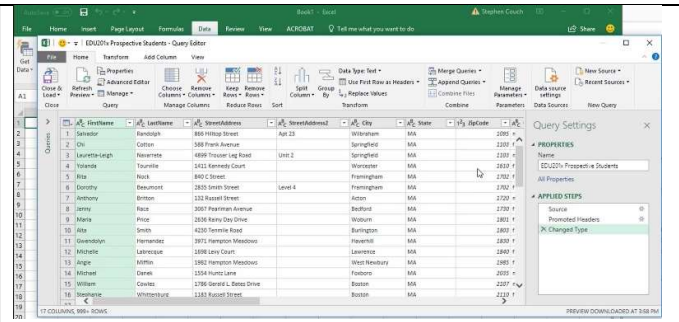
Name	Status	Date modified	Type	Size
assets	✓	1/06/2022 12:53 PM	File folder	
resources	✓	1/06/2022 12:53 PM	File folder	
EDU Postcard CC2022.indd	✓	22/07/2022 12:15 PM	InDesign Document	2,108 KB
EDU Staticidml	✓	12/10/2017 9:04 AM	InDesign Markup ...	335 KB
EDU_Scores.csv	✓	10/10/2017 2:13 PM	Microsoft Excel C...	1 KB
EDU201x Prospective Students.csv	✓	5/09/2017 2:38 PM	Microsoft Excel C...	318 KB
TUTORIAL-1_Project-planning_v2.pdf	✓	22/07/2022 1:16 PM	Adobe Acrobat D...	1,372 KB



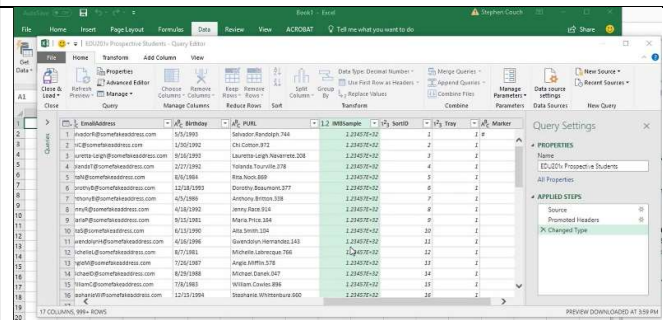
In this case, the data is CSV which is a bit hard to look at in a text editor, so I will import it into Excel.

When you are checking data like this with Excel, it is important not to re-save it unless you understand what might change.

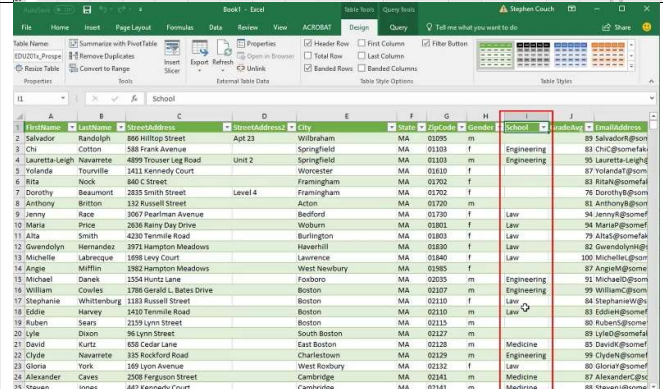
I know that Excel is wanting to change these postal codes because they are missing a zero at the front. I'll change Excel so it treats this column as text.



And the same for the IMBSample data. This is the information for the Intelligent Mail barcode and because the number is so long, Excel will try to change it to scientific notation.

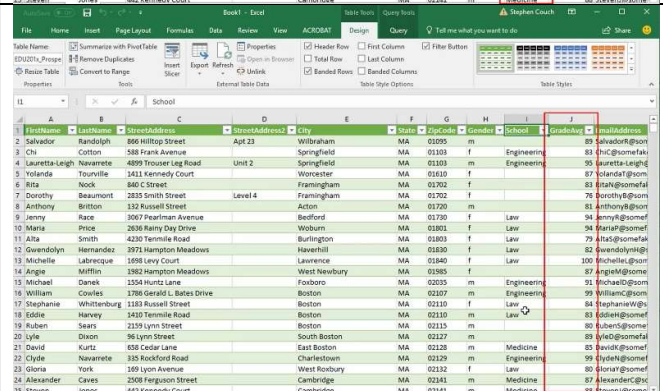


For our project we need to change the School photo in the document, so here in the data, we can see that we need images for Medicine, Law and Engineering Schools.

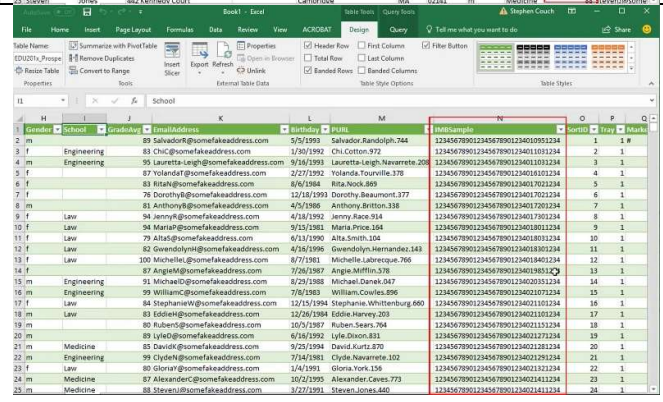


We can also see that there are records with blanks – or no School value is defined. This tells us that we will need to have a general or generic image and write a rule to show this image instead of the School image if there is no value.

The other field to note was the Grade Average and it seems like there are scores for all students.



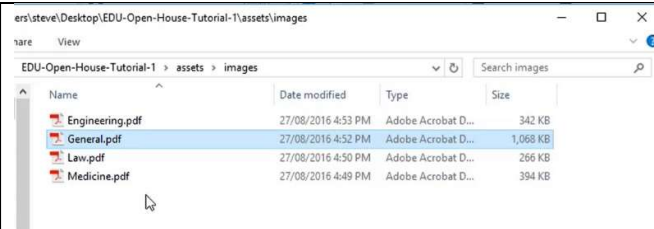
While we are looking at the data, it is also a good idea to ask your customer if the data they provided has been cleaned and had the address verified by a mailing service.



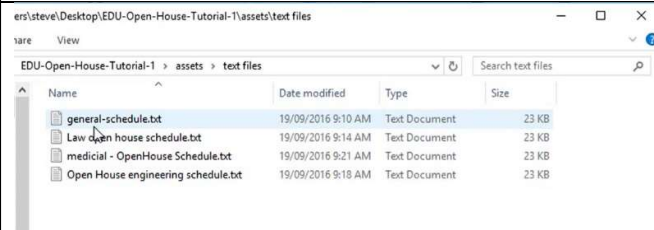
For a small fee, this kind of service can dramatically improve deliverability of mail, and therefore increase the response or results of the campaign.

The service can also add the code that needs to be added into postal barcodes like the USPS Intelligent Mail routing code seen here.

Next, we need to gather those resources. The university has provided a folder of assets – the asset images are all provided – we have one for each of the Schools we saw in the data, and also a general one.



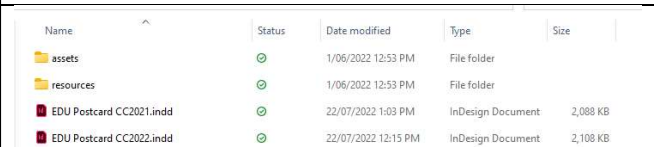
There is also a folder of text file assets. These are the different agendas for each School's open day activities. Again, we have one for each of the required Schools and a general one. But the files are not names consistently. We can write a rule to pick the right file, but personally I would consider renaming the files.



A quick note here about the folder structure. These files that will be pulled into the document based on rules are referred to as assets and should be located in one folder.

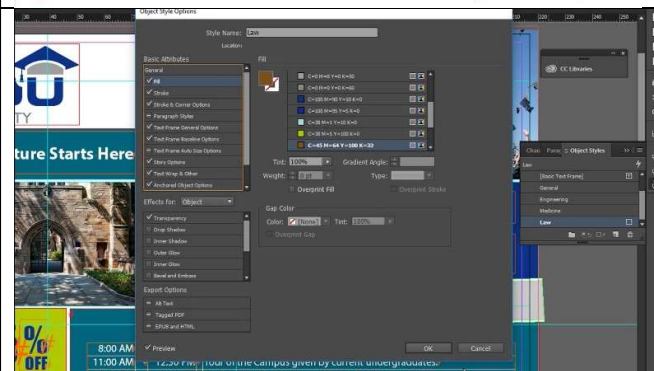
In your future projects, you should do the same thing. Having to search through thousands of files will take time when it comes to processing your file, and if you will later work with the server, uploading unnecessary files will also cause you delays.

Other files needed for the document – such as logos and other graphics that will be the same for all records – should be in a separate folder. XMPie refers to these as resources.



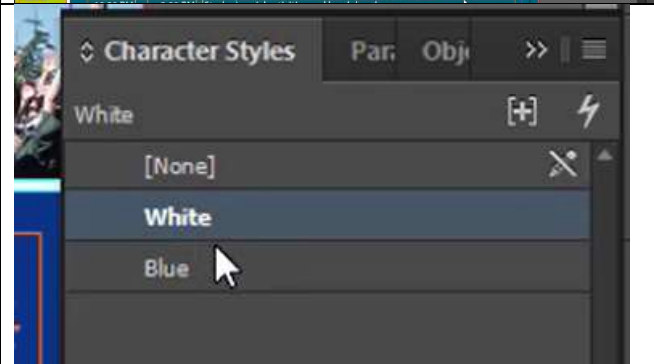
Next, look at the sample document the university provided.

First, I can see that no fonts were missing when I opened the document.



I can see that the Object styles have the School colors defined, so we don't need to worry about getting those color definitions.

And the character styles have the blue and white styles that will be required for the variable text color.



Next, is general prepress best practices. Check the size of the images in the document,



and check the images in Photoshop to ensure the size and resolution is not too big or too small.

Many customers new to VDP find it easiest to plan out all of the Content objects they need before they start. Listing down the name, type and some information about each of the Content objects helps to make sure that everything has been covered and anything missing is found before you start. A list is even more important if you have several people working on the same project – it will help keep everyone on the same page.

The 3rd module in the tutorial PDF gives you a sample Content object list for this project.

uCreate Print is very flexible and you can add and edit things as you go. When you create a list for your future projects, use the process to help you plan - don't feel that you must have everything documented before you can start.

Content object list

Content objects automatically created from data source fields
Content objects to create manually

Name	Type	Description	Notes
Firstname	Text		
Lastname	Text		
StreetAddress	Text		
StreetAddress2	Text		Need to handle records with no second address line so there are no gaps in the address block.
City	Text		Need to format in upper case for the address.
State	Text		
ZipCode	Text		
Gender	Text		
School	Text		
GradeAvg	Text		
EmailAddress	Text		
Birthday	Text		
PURL	Text		
IMBSample	Text		
SortID	Text		
Tray	Text		
Marker	Text		
School photo	Graphic	Based on School data source field.	Need to show general image if school is empty.
Discount	Text	Based on School data source field.	If School = Engineering then 20 else 15.
School or University	Text	Based on School data source field.	If School is empty, show "EDU University" otherwise "the School of " & School name.
Scholarship	Visibility	Based on GradeAve data source field	Visible if GradeAve > 85.
School color	Style	Based on School data source field.	Change the background color to the School color.
Text color	Style	Based on School data source field.	Change the text color to blue if the School = Medicine. Else use white text.
Agenda	Text File	Based on School data source field.	Select to import the correct agenda text file based on the School.
Postal barcode	Graphic		Display the IMBSample data as USPS Intelligent Mail barcode.
QR Code	Graphic		Display the campaign personal URL as a QR Code.
ulImage	Graphic		Use the ulImage package created in Tutorial 6 to create personalized images.
Chart	Table	Based on School data source field.	Select the EDU Scores data for the relevant School.
Chart visibility	Visibility	Based on School data source field.	Show Chart layer if School is empty. Else, show the new uChart layer.