

PE Variable Data Print Training

Customer Expectation Document

XMPie PersonalEffect Print or XMPie PersonalEffect Print Pro or XMPie Enterprise Print

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one to one in one™

A **xerox**  Company



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About this document

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

There is a lot of information in this document, from what to do 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, it is highly recommended. For those not using the actual XMPie plug-ins and applications, it is helpful if you take the time to review the tutorials. Refer to the Pre-Training Tutorials for more information.

XMPie environment: It is preferred that training is given on your own system, exceptions can be made if planned for in advance. Refer to the Required facilities section for more information.

Room Setup: (completed before training): Besides the XMPie environment, it is best to coordinate how you will setup the training area (eg when you will install applications, move computers if needed and such). Refer to the Required facilities section for more information.

Who should attend each day's training

We understand that it is not always possible to take everyone away from their regular routines for 2.5 days, it is strongly recommended that a small core group of XMPie software users and a lead attend every day of training.

Each day's hands-on lessons are built on the previous days' training. The core group could be a print designer, a database/mailling list manager, an web developer/API programmer (if using system as a platform), and a project manager. See the Agenda for more information on each day's requirements.

Day 1: Everyone that works with, sells, manages those that do either, or wants to know about XMPie may attend the overview. After the overview, it is recommended that everyone that will use XMPie software in any way stay for the basic training, even if they are not doing the hands-on.

Day 2: Designers creating products and setting up production of those templates.

Day 3: Designers creating products and setting up production of those templates.



About PersonalEffect VDP

PE Variable Data Print training is recommended when you have purchased one of the following configuration packages:

- PersonalEffect Print
- PersonalEffect Print Pro
- Enterprise Print

PersonalEffect Print and Enterprise Print are both powerful variable data print (VDP) platforms that include both desktop- and server-based tools to handle high volumes of VDP output, and multiple VDP jobs at once.

It is important to note which software bundle was purchased, as this has some effect on training and workflows.

- ❑ *PersonalEffect Print* (software bundle) includes the following software components: uProduce XE (XLIM production server), a single uCreate Designer (InDesign plug-in) license, and a single uProduce/uCreate connectivity license.
- ❑ *PersonalEffect Print Pro* (software bundle) includes the following software components: uProduce IND (XLIM & InDesign production server), a single uPlan (logic module) license, a single uCreate Print (InDesign plug-in) license, a single uCreate Designer (InDesign plug-in) license and three uProduce/uCreate connectivity licenses.
- ❑ *Enterprise Print* (software bundle) includes the following software components: uProduce Director IND and Extension servers (XLIM & InDesign production), a single uProduce IND Development Print server, a single uPlan (logic module) license, a single uCreate Print (InDesign plug-in) license, two uCreate Designer (InDesign plug-in) license and five uProduce/uCreate connectivity licenses.

XMPie also sells additional add-on software, some of which is referenced in this document. A table of [additional courses](#) has been provided for customers who have also purchased these items. If you purchased and require training on these optional items, it is recommended to also purchase additional training time so that there is sufficient time to cover these topics.

It is important to note that software bundles change overtime, can be sold with additional modules or licenses, and the above information may not reflect your exact purchase. It is best to check with your sales representative, support team or ask your trainer, if you are not sure.



Course overview

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

The course starts with a brief introduction and review of the agenda. The introduction will also describe the concept of VDP and why it is an important tool for today's marketers and print service providers.

Participants will start with XMPie's desktop tools for building business rules (logic) and to create VDP print templates using Adobe InDesign. The production server is then introduced to show the collaborative teamwork approach to building campaigns and the performance of server-based print production.

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

Duration and delivery method

Two and half (2.5) days onsite instructor-led training. In order to get the best value from this training, please refer to the [Required facilities and equipment](#) section later in this document.

Number of participants

It is recommended to limit the number of participants to 10.

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

Inversely, if there are more than the recommended number of participants, or those attending don't have the necessary skills and experience outlined in the [Prerequisites and preparation](#) section, we cannot guarantee that all training goals will be reached, and the amount of interaction and help provided to each participant is reduced.

Who should attend

This course is designed for customers who have just purchased XMPie PersonalEffect Print, or where new staff have joined the organization and they have no previous knowledge of XMPie products.

The team involved in creating and producing successful VDP campaigns is very diverse. The [Course Agenda](#), lists the target audience for each module of the course. In general the course is designed for:

- Print designers, who will create InDesign document templates for use with uCreate Print/Designer.
- Marketing or business specialists, who will determine the business rules or logic that will be used to change the document design based on values in the database.
- Database administrators or staff, who manage the data which will be used for the campaigns.
- Prepress or production staff, who will create the variable data print output from the InDesign document templates using XMPie desktop or server applications.

- System analysts, project managers, support engineers, trainers, demonstrators, and any other personnel, who will demonstrate, use, train, or support Adobe and XMPie products within the company.

This course is designed as “introductory” training, so it will start with the expectation that attendees will have no previous knowledge of the XMPie products. However, it is expected that participants will have:

- a working knowledge of Adobe InDesign,
- a basic understanding of the aim / objective of variable data printing (VDP), and
- basic skills with handling data (CSV, Microsoft® Excel®, Access®, etc.) along with some logic/scripting skills.

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

Goals and objectives

In addition to using the XMPie software purchased, at the end of this course, participants will be able to:

- Communicate the benefits of personalizing marketing material.
- Create VDP (print) templates which include a variety of dynamic objects types.
- Recognize, create and use different types of ADOR objects and script their expressions.
- Understand and use a few advanced features and functions (e.g. XMPie barcode function, copy fitting, dynamic print, etc.) where applicable.
- Understand and design for the server input document format (XLIM and/or InDesign) required for production.
- Generate print PDF output files for a range of database recipients. Different VDP output format can be shown as requested.
- Login and use our learning portal, Campus. Locate the user guides for the various products.
- Login and use our support and information portals.

Prerequisites and preparation

Adobe training

If participants are new to Adobe InDesign, it is recommended that they first participate in an Adobe training course. Adobe offers a wide range of courses including recorded tutorials, online, classroom and onsite training in most countries.

For more information refer to: <http://helpx.adobe.com/learning.html>

Adobe InDesign skills

Participants should have a working knowledge of Adobe InDesign before using uCreate Print.

If participants in this training are not regular users of Adobe InDesign, it is recommended that they take some time to refresh their knowledge of InDesign before the course.

Specific InDesign skills to review:

- Create new and modify existing InDesign documents including adding/deleting pages.
- Create text boxes, place text and change text attributes (fonts, colors, etc.) and paragraph attributes.
- Create graphic boxes, place images and use controls to scale, transform, etc.
- Create layers, move objects to different layers and identify which layer an object is on.
- Insert a table, format rows, columns and cells.
- Experience with font, paragraph, object and table styles.

While not necessary, it is desirable for participants to understand prepress best practices for document design. - For example to understand how image size and transparency affects print speed. - These basic prepress skills will help to ensure that the documents created will process and print efficiently.

Database and logic skills

The heart of variable data printing is the data. Participants should be able to:

- Manipulate data using Microsoft Excel, Microsoft Access or other similar programs.
- Explain data concepts such as tables, rows, columns, sorting and de-duping.
- Explain the differences in data value types (e.g. text, number, date).
- Explain the principles of basic programming logic (e.g. if/else statements, substring).

While not necessary, an introductory knowledge of relational database concepts and SQL would be an advantage.

General computer skills and internet knowledge

The Adobe creative tools, and XMPie uCreate Print are compatible with both Microsoft Windows and Apple Macintosh computer systems. XMPie uPlan is Windows-only tool. It is expected that participants will be able to operate their computer to start applications, open and save documents, and send or copy print files to production printers.

When working with multiple, separate computer systems (client workstations, production servers, and output devices/RIP software) knowledge of basic networking is essential.

English language

By default, training will be provided in English. Some of our instructors are proficient in a second language. However, there may be a delay and additional travel costs to schedule the appropriate person. Please contact your XMPie Account Manager for further information.

Pre-training tutorials

This course will start from an introductory level using uCreate Print or uCreate Designer. However, if desired, participants in this training can get a head-start by downloading, working through and/or reviewing some of our tutorials. We suggest starting with the **uDirect "Open House" (aka Classic) Tutorial** (for EDU) to get a feel for how we create and place dynamic content into templates or the new **uCreate Print Training** video series.

To review training materials, download tutorials and watch video, please visit XMPie Campus. For links to this and other sites, see the [XMPie Site](#) section at the end of this document.

This will provide an opportunity to maximize time with the trainer on more advanced topics and to discuss any questions raised during your self-study.

Required facilities and equipment

Room requirements

For maximum value, training should be conducted in a quiet room away from production equipment or office areas. The following is a check list for the training room:

- An instructor desk/table, with a connection to video projector or large flat panel display is required, along with a connection to the network (and/or internet as needed). Instructors will bring their own company-provided laptops with required software and implemented security features (e.g. antivirus, firewall).
- Individual Mac/Win workstations for trainees with network, internet and required software:
 - Adobe InDesign, Adobe Photoshop (optional),
 - XMPie uCreate Print (Professional, Designer or 30-day trial),
 - XMPie uPlan (on at one or more Windows workstations, licensed or 30-day trial)
 - required only if your configuration includes at least one license or was purchased separately, *(more details regarding workstations, network and software follow in this section)*.
- List of URLs and passwords to access the uProduce dashboard, and details for any printer RIP that could be used for testing printed output (i.e. hotfolders' network addresses).

| Site | URL | Admin User (if not default) | Password (if not default) |
|-----------|---|--------------------------------|------------------------------|
| | <i>(ex. http://servername_or_IP/xmpiedashboard)</i> | <i>(ex. admin)</i> | <i>(ex. admin)</i> |
| Dashboard | http:// | | |

Other

- Some servers may need remote access, having this information on hand is helpful.
- A whiteboard or presentation flip chart (and markers), would be useful but is not required.
- There will be breaks throughout the day, so beverages (facilities or service) for attendees would be welcome.

Network, printer and internet access

A connection to the company network is required for each participant and the trainer. Connection to the internet may also be required to access servers outside of the network (as needed). If the trainer is not allowed on your network, then he/she will require internet access to their XMPie Training Server.

It is requested that your IT network or system administrator be available to assist when the instructor arrives, if help is needed setting up the connections.

Computer and software

All participants must have their own computer, or access to a computer for this training. Computers can use either the Macintosh or Windows operating systems. If the uPlan application was purchased, there must be at least one workstation with Windows in order to install and use this application during training. (A remote connection to a uPlan/workstation, is acceptable.)

Computers must have Adobe InDesign, and Photoshop with version CC2020 (or CC2019). Adobe Photoshop is required, only if the ulmage add-on application was purchased. For the purposes of training, it may be possible to use a 30-day trial version of the Adobe products.

NOTE: It is critical that the Adobe applications be installed prior to the start of training. Downloading and installing a trial version takes considerable time and will leave participants behind and seriously disadvantaged. Also, it is essential that participants refresh knowledge of these applications. See the [Prerequisites and preparation](#) section for a more detailed list of skill sets.

NOTE: Adobe Creative Cloud Suite (desktop) is updated annually to a new version. XMPie software is updated sometime after the release of Adobe's InDesign Server matching version. It is recommended to disable autoupdates and/or not to install a new version of CC without checking with our support team for a compatible version of uCreate Print.

It is also recommended to have the XMPie Desktop tools installed prior to training. You will receive download links from your XMPie, Xerox or channel partner support team. If participants will not be using their own computer for training, we can issue 30-day trial licenses for training purposes. Please be aware that our desktop 30-day trial license keys may unlock more functionality than purchased and after this period, the trials revert to normal trial functionality. To obtain these temporary licenses, please contact your trainer prior to training.

XMPie server installation

XMPie, Xerox or your channel partner will install and test the server products you have purchased. It would be best, if this installation process is completed before the training.

In the event that servers are not available in time, the trainer will use temporary remote servers. This means that afterwards, the sample campaigns and documents created during training may not be available after training.

If the configuration of the XMPie system includes a proxy server, this server may require a redirection utility (for example, an application called ISAPI Rewrite by Helicon) which needs to be configured for access to the dashboard if/when access is needed from outside your internal network. This should be tested before training and remote access granted to someone attending training.

Course agenda

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

Day 1 (full day)

| Objectives | Duration | Audience |
|--|--|--|
| <p>Setup</p> <p>Your instructor will need some time to setup and check access to your uProduce server, printers, etc. Please refer to Required facilities and equipment</p> | <p>.5 – 1 hour Before training starts.</p> | <p>Instructor, training coordinator and/or network administrator</p> |
| <p>Module 1 - Introduction and overview</p> <p>This introductory module is an overview of XMPie and our multi-channel marketing capabilities. The purpose of this module is to introduce PersonalEffect Print, show what can be done with the product, and review the agenda for training.</p> <p>Performance Objectives:</p> <p>At the completion of this training, the trainee will be able to:</p> <ul style="list-style-type: none">● Understand what will be covered during training and what XMPie products were purchased.● Discuss industry terminology.● Describe XMPie (product) workflows.● Understand the basics of ADOR technology.● Explain what is VDP and why do we need it.● Distribute and review the tutorial files. | <p>1 – 1.5 hours</p> | <p>Everyone is invited to this presentation.</p> |

| Objectives | Duration | Audience |
|--|--------------------|--|
| <p>Module 2 - Basic print campaign</p> <p>This module is an introduction or review (based on pre-training tutorials completion) using InDesign and uCreate Print, to complete a basic Variable Data Print (VDP) document.</p> <p>Performance Objectives:</p> <p>At the completion of this training, the trainee will be able to:</p> <ul style="list-style-type: none"> ● Assess campaign goals (briefing) and prepare materials. ● Describe and use the XMPie uCreate Print panel. ● Complete a VDP campaign from start to finish within the InDesign application. <ul style="list-style-type: none"> » Understand how ADOR values are based on the linked data and business rules. » Use the Rule Editor; create/modify various ADORs and types. » Create (plan) variables to be used as user input fields. » Tag the template by placing ADORs into the design file. » Use QLingo functions within the Rule Editor. » Set assets source location and use common features. » Explain how transparency and other features affects 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 and/or use the connectivity feature that allows saving to and/or opening document from the uProduce. | <p>4 - 6 hours</p> | <p>Mandatory:</p> <ul style="list-style-type: none"> ● Print designers who will create document templates. <p>Desirable:</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>Exercises</p> <p>Any remaining time in Day 1 can be used to explore customer-specific VDP needs, or start Module 3 (see day 2)</p> | | |

Day 2 (full day)

| Objectives | Duration | Audience |
|---|----------------|--|
| <p>Module 3 - Print production on the uProduce server</p> <p>In this module, we introduce the uProduce production server and the concept of importing/exporting document and campaign packages. Also, we will discuss the print production differences between desktop (from within InDesign) vs uProduce server.</p> <p>Performance Objectives:</p> <p>At the completion of this training, the trainee will be able to:</p> <ul style="list-style-type: none"> ● Describe and use the uProduce Dashboard. ● Create new users and review other administrative tasks. ● Create new Account and Campaign containers and modify their properties. ● Upload campaign components using XMPie packages and/or individual component files. ● Discuss data conversion for flat data sources. ● Replace components that have been modified using the check-out/check-in process. ● Create and use destinations; review other settings. ● Discuss and use the print output features and options for various output formats. ● Generate print proof and final print PDF production using XLIM or XLIM & InDesign engines (depending on product purchased). ● Review how uCreate Connectivity can be used in place of using the uProduce Dashboard. | <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>Desirable:</p> <ul style="list-style-type: none"> ● Programmers who intend to use the PersonalEffect API to develop custom applications (if applicable). |

| Objectives | Duration | Audience |
|---|------------------|--|
| <p>Module 4 - Intermediate print campaign logic</p> <p>Using the same or similar material as Module 2, this module introduces intermediate level business logic using one of the methods below. The instructor will work with group to decide which method is best based on purchased configuration, customer requirements, and trainees' experience.</p> <p>Method 1: Using uCreate Print/Designer</p> <p>Performance Objectives for Method 1</p> <p>At the completion of this training, the trainee will be able to:</p> <ul style="list-style-type: none"> ● Modify the business rules (while connected to the document through uProduce, if possible). ● Create (plan) variables and use these with ADORs. ● Modify QLingo using the View QLingo window. ● Run uProduce print production from uCreate (connectivity) or save changes to upload to uProduce. ● <p>Method 2: Using uPlan</p> <p>By using uPlan (if applicable), you can separate campaign logic and creative design. uPlan also provides additional functionality that cannot be achieved with the uCreate Rule Editor.</p> <p>Performance Objectives for Method 2</p> <p>At the completion of this training, the trainee will be able to:</p> <ul style="list-style-type: none"> ● Modify existing plan files. ● Modify and use common QLingo functions. ● Create various ADOR types and script their expressions. ● Generate and view multiple (ADOR) proof sets. ● Link the plan and proof set(s) to a new design template using uCreate Print within InDesign. | <p>4-5 hours</p> | <p>Mandatory:</p> <ul style="list-style-type: none"> ● Print Designers who will create document templates. ● <i>Only Method 2</i> Database users who work with data sources and build the business logic-based campaign requirements. <p>Desirable:</p> <ul style="list-style-type: none"> ● Marketing or business managers who set the rules for changing the document design based on data values, and/or ● Programmers who intend to use the PersonalEffect API to develop custom applications (if applicable). |
| <p>Exercises</p> <p>Any remaining time in Day 2 can be used to explore customer-specific projects, additional exercises or start optional modules.</p> | | |

Day 3 (half day)

Customer campaigns and optional modules

Day 3 is also an opportunity to review or complete earlier modules, or to look at some of your VDP templates and how they could be implemented with XMPie PersonalEffect Print.

| Objectives | Duration | Audience |
|--|----------|----------|
| <p>Module 4 - Intermediate print campaign logic (cont'd)</p> <ul style="list-style-type: none">● Complete previous days exercises as needed. <p>Testing</p> <ul style="list-style-type: none">● Place campaign components onto the uProduce server, and generate output using uCreate Connectivity or XMPie Packages.● Test output generation by using a new recipient data source. | tbd | |
| <p>Exercises</p> <p>Any remaining time in Day 3 can be used to explore customer-specific projects, additional exercises or view optional modules such as ulmage or uChart.</p> | | |



Optional Training

Optional modules

The following modules are optional and can be given on Day 3, depending on the products purchased, and the available time: Decide with your instructor, preferably on Day 2 which modules, if any, could be provided. It is highly recommended to purchase additional training as needed for topics not covered during the initial 2.5 training.

| Optional Objectives | Duration | Audience |
|--|--------------------|---|
| <p>Module 5 - Intermediate campaign objects/logic</p> <ul style="list-style-type: none"> ● Understand the differences between recipient data and additional data sources. ● Use two data sources to create a dynamic table using uCreate Print. ● Discuss and/or use uCreate to run proof and print production generated from uProduce. ● Discuss and/or use Circle to run proof and print production (if this workflow applies to the trainees). ● Repeat Module 4 using the alternative method (if app.). ● Advanced uPlan (if app.): <ul style="list-style-type: none"> » Describe and use the uPlan wizard and application GUI. » Create a new plan. » Understand, and create recipient data filters. » Use additional data sources with plan User Views. » Create ADOR tables, or Text ADORs using User Views. » Create and use a user-defined plan Function. | <p>1 - 4 hours</p> | <p>Mandatory:</p> <ul style="list-style-type: none"> ● Print Designers who will create document templates. ● Database users who work with data sources and build the business logic-based campaign requirements. <p>Desirable:</p> <ul style="list-style-type: none"> ● Marketing or business managers who set the rules for changing the document design based on data values, and/or ● Programmers who intend to use the PersonalEffect API to develop custom applications (if applicable). |

| Optional Objectives | Duration | Audience |
|---|---|--|
| <p>Module 6 - Advanced uProduce options</p> <p>This module allows for more practice within the uProduce dashboard.</p> <p>Performance Objectives: At the completion of this training, the trainee will be able to:</p> <ul style="list-style-type: none"> ● Generate other types of print output formats. ● Filter data records for specific output using data queries. ● Process a campaign that uses more than one data source for output. ● Review administrative screens and configure output settings. ● Use other process options, such as Filler Pages. | 1 hours | <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>Desirable:</p> <ul style="list-style-type: none"> ● Programmers who intend to use the PersonalEffect API to develop custom applications (if applicable). |
| <p>Module 7 - ulmage introduction</p> <p>This module covers the basics of using ulmage for personalizing Adobe Photoshop images as part of the campaign.</p> <p>Performance Objectives: At the completion of this training, the trainee will be able to:</p> <ul style="list-style-type: none"> ● Create a font-based Photoshop ulmage package. ● Use the ulmage package with the uCreate Print Rule Editor to create a Graphic ADOR. ● Tag an InDesign document with the new Graphic ADOR, preview and/or use Dynamic Print to view samples. <p>Advanced Objectives (as needed and if time permits):</p> <ul style="list-style-type: none"> ● Create a “Separated Letters” ulmage package. ● View a demonstration of an “Image Font” template from the XMPie Marketplace, and review steps to update the template (as needed). ● Modify a Graphic ADOR expression to use ulmage templates using uPlan. ● Upload and use the designs (InDesign & ulmage) on the uProduce server for production or generate ulmage output from desktop to use as assets on server (if server module wasn't purchased). | 1 hour to demonstrate or 3 - 4 hours to perform | <p>Mandatory:</p> <ul style="list-style-type: none"> ● Print Designers who will create document templates; ● Photoshop designers who will create the ulmage templates. <p>Desirable:</p> <ul style="list-style-type: none"> ● Marketing or business managers who set the rules for changing the document design based on data values, |

| Optional Objectives | Duration | Audience |
|--|--|--|
| <p>Module 8 - uChart introduction</p> <p>Participants will learn how to create a Table ADOR, how to place and style the table in InDesign and how to convert the table of data into a chart for use in print campaigns.</p> <p>Performance Objectives:</p> <p>At the completion of this training, the trainee will be able to:</p> <ul style="list-style-type: none"> ● Generate a Table ADOR using a User View linked to additional data within uPlan or linked to second data table using the Rule Editor. ● Use the Table ADOR to create dynamic InDesign tables. ● Discuss mold rows, auto-flow, suppress empty tables. ● Place the Table ADOR into a graphic box to create a dynamic chart. ● Use the uChart interface to configure the chart. | <p>1 hour to demonstrate or 3 - 4 hours to perform</p> | <p>Mandatory:</p> <ul style="list-style-type: none"> ● Print Designers who will create document templates. <p>Desirable:</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>Module 9 - High-level overview of web service APIs</p> <p>uProduce includes a powerful Application Programming Interface (API) which can be used to set up automation or to integrate other web-based applications.</p> <p>Performance Objectives:</p> <p>At the completion of this training, the trainee will be able to:</p> <ul style="list-style-type: none"> ● Discuss how the APIs can be used for automation or with external web-based applications (e.g. e-commerce, Request Site) to produce print proofs and run production. ● Locate and discuss the API documentation and sample walkthroughs. | <p>~ 1 hour (no demo or hands-on)</p> | <p>Mandatory:</p> <ul style="list-style-type: none"> ● Programmers who intend to use the PersonalEffect API to develop custom applications. <p>Desirable:</p> <ul style="list-style-type: none"> ● Marketing or business managers who set the rules for changing the document design based on data values. |

Additional courses from XMPie

XMPie offers a number of standard courses including both online and onsite training courses.

Onsite, Instructor-lead courses

| |
|-----------------------------|
| ✓ Included |
| ⊙ Included with Pro version |
| ○ Optional* |
| ‡ Split over two sessions |

| | | PE Variable Data Print Training | PE TransMedia Training | PE Web-to-Print Training | PE Full Suite Introduction | PE Full Suite Advanced |
|-----------------|--|---------------------------------|------------------------|--------------------------|----------------------------|------------------------|
| Duration (days) | | 2.5 | 4 | 4† | 5 | 10‡ |
| Course Modules | Introduction and overview | ✓ | ✓ | ✓ | ✓ | ✓ |
| | Basic print campaign | ✓ | ✓ | ✓ | ✓ | ✓ |
| | Print production on the uProduce server | ✓ | ✓ | ✓ | ✓ | ✓ |
| | Print campaign with uPlan and advanced features | ⊙ | ✓ | ⊙ | ✓ | ✓ |
| | Using Circle and creating personalized websites and emails | | ✓ | | ✓ | ✓ |
| | uStore (Basic) – web to print and online print portals | | | ✓ | ✓ | ✓ |
| | Marketing campaign tracking and analysis | | ✓ | | ✓ | ✓ |
| | ulmage introduction | ○ | ✓ | ○ | ✓ | ✓ |
| | uChart introduction | ○ | ○ | ○ | ✓ | ✓ |
| | High-level overview of API web services | ○ | ○ | ○ | ○ | ✓ |
| | Advanced uPlan and campaign features | ○ | ○ | ○ | ○ | ✓ |
| ulmage advanced | ○ | ○ | ○ | ○ | ✓ | |

* Additional training time may need to be purchased, if optional items are required. Please work with your sales/presales, and/or trainers to determine how much time and the best delivery method of those topics.

† PE Web-to-Print Training can be given as a 4-, or when necessary, a 3-day training course. Topics and/or time allocated to cover required topics will be reduced to fit the purchased time.

‡ For the Advanced PersonalEffect Full Suite Training, it is recommended that the training is delivered in two sessions with at least 2 to 4 weeks in between the two sessions. This break is designed to give participants an opportunity for more hands-on time with the software, and to start creating campaigns/stores for your company and customers. This means that the second half of training can focus on advanced topics and projects which relate directly to your organization.

Online, Instructor-lead 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, agenda, and materials needed. Please contact one of our training professionals or sales consultants for more information.

Further information

For more information about XMPie Training courses, please contact:

- Your XMPie Reseller or Account Manager
- Or, email:
 - trainingNA@xmpie.com - for North American enquiries
 - trainingROW@xmpie.com - for enquiries from other regions

XMPie Sites

Support

- » <http://www.xmpie.com/support> - XMPie Support Portal (powered by Salesforce) is used for communication between customers and our support teams. You need an active account on this portal to register for the sites below.
- » <http://campus.xmpie.com> - XMPie Campus, our eLearning and training hub for current XMPie Customers.
- » <http://info.xmpie.com> - XMPie Information Portal with access to additional case studies, presentations, and much more.
- » <http://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...

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