

PE E-Media Cloud Training

Customer Expectation Document

XMPie PersonalEffect e-Media Cloud

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one to one in one™

A **xerox**  Company



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For information, contact XMPie, A Xerox Company.

485 Lexington Avenue, 10th Floor

New York, NY 10017

More information can be found at www.xmpie.com

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

About PersonalEffect e-Media Cloud

PersonalEffect e-Media Cloud is designed to create and deploy marketing campaigns across multiple media channels including print, email, and web.

With PersonalEffect e-Media Cloud, you can use personalized print (from desktop) or use email to drive customers to their personalized website, then track and analyze responses with the XMPie Analytics. This measurement and reporting assures the marketing team that the next wave of the campaign can be more relevant to the recipient – thus leading to higher response rates and greater return on investment.

PersonalEffect e-Media Cloud is a software bundle that includes the following products: uProduce e-Media Cloud (hosted server), Open XM™ (technology) that includes the XMPL server, PersonalEffect Analytics (Signature Edition) that includes the Marketing Console (application), a subscription to XMPie Circle (PersonalEffect Edition) and a subscription to XMPie Email Services (Professional Edition). If the XMPie Creative Suite Cloud was purchased (desktop products), your bundle includes uPlan, uCreate Print, and uCreate Digital.

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.

Course overview

This course is designed to provide introductory training on the latest version of XMPie PersonalEffect e-Media Cloud 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 e-Media Cloud communications and why it is an important tool for today's marketers and service providers. Examples of e-Media Cloud or TransMedia campaigns may be shown to help illustrate this if necessary.

Participants will start with XMPie Circle server, to storyboard a cross-media campaign. Then move on to the desktop tools for building business rules (logic), and create Variable Data Print (VDP) print templates using Adobe InDesign. Circle is revisited and used to connect and build the cross-media campaign components. The course then moves on to creating the personalized HTML emails and websites using XMPie tools and Adobe Dreamweaver.

Throughout the course, more advanced topics/features will be discussed and demonstrated, providing a solid grounding on the basics of setting up business rules, creating variable templates for print, web, and email, then deploying and measuring the final campaign results.

Duration and delivery method

Online instructor-led training sessions using Web-Ex (or similar software) for web and phone conference.

The training included with PersonalEffect e-Media Cloud is sold in one of two ways (based on your geographical location and/or requirements): 4 three-hour online sessions or 3 three-hour online sessions. The first session (of four sessions) is considered uDirect Classic training, where you learn how to use the XMPie plug-in to Adobe InDesign.

- » Not all customers need this session; if you were sold 4 online sessions and do not need this training, this extra time can be used as a review or saved for other topics.
- » Some customers need this session; if you were sold 3 online sessions, we recommend that you do this VDP tutorial on your own and review questions with your instructor during your first online session. Alternatively, consider purchasing additional training, as suggested below.

If the trainees are NOT already familiar with uCreate Print (eg creating rules, tagging ADORs) then it is highly recommended to purchase additional session(s), please reference the online sessions available in the [Additional Courses](#) section.

In order to get the best value from web-based training, please refer to the [Required facilities and equipment](#) section later in this document.

Number of participants

It is recommended to limit the number of participants to 6.

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 either

- Existing XMPie uDirect desktop users expanding into email and web marketing using their purchase of XMPie PersonalEffect e-Media Cloud (typically, 3 three-hour sessions) or
- New users or where staff have joined the organization and have no knowledge of XMPie products (typically, 4 three-hour sessions).

Note: If your package was 9 hours (vs 12), we encouraged you to consider purchasing [additional](#) training session(s) as preparation for this course to learn and/or review the basics of VDP using XMPie desktop products.

The team involved in creating and deploying a multi-channel marketing campaign is very diverse. The [Course Agenda](#) lists the target audience for each module of the course. The target audience includes:

- Print designers, who will create InDesign document templates for use with uCreate Print/Designer.
- Web designers, who will create web and email document templates using Circle, Dreamweaver and uCreate Digital.
- 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, who manage the data which will be used for the marketing campaigns.
- Prepress or production staff, who will create the VDP 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 e-Media products and services. However, it is expected that participants will have:

- a working knowledge of Adobe InDesign and Dreamweaver,
- a basic understanding of the aim / objective of cross-media campaigns,
- basic skills with handling data (CSV, Microsoft® Excel®, Access®) along with some logic/scripting skills,
- a basic understanding of internet technologies, and
- a working knowledge of building websites, HTML, and basic scripting skills.

The 3 three-hour agenda expects participants will have :

- a working knowledge of uCreate Print Standard (part of the XMPie uDirect packages).

A complete list [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:

- Use XMPie Circle as a production hub for planning and collaborating on multi-channel marketing campaigns.
- Communicate the benefits of personalizing multi-channel marketing materials.
- Create new personalized response websites using pre-made web templates and/or from custom HTML designs, including personalizing HTML- and/or text-email documents.
- Create and use web-form pages to insert and/or update recipient information in the database.
- Configure triggered on-demand emails from campaign web pages.
- Discuss and test sending bulk marketing emails.
- Analyze marketing campaign statistics using various charting types and data lists.
- Understand the importance of SPAM regulations and use the technology wisely to avoid blacklisting.

Prerequisites and preparation

Adobe training

If participants are new to Adobe InDesign and Dreamweaver, 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 the print component of 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.

Adobe Dreamweaver skills

In addition to basic web publishing knowledge, participants should have a working knowledge of Adobe Dreamweaver before using uCreate XM.

If participants in the web and email components of training are not regular users of Adobe Dreamweaver, it is recommended they take some time to refresh their knowledge of Dreamweaver before the course.

Specific Dreamweaver skills to review:

- Configure a new website via the site manager.
- Manage remote site (eg synchronizing, ftp, remote network) via the site manager.
- Create anchors and references to link to other pages.
- Create form pages with text, hidden, radio, select and submit form objects.
- Add and edit text, changing fonts via tags and/or css.
- Add and position images and other html page elements.
- General web page design or layout with tables or css. (Responsive design experience is helpful.)

While not necessary, it is desirable for participants to understand data-driven website concepts.

Database and logic skills

The heart of VDP 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 (eg text, number, date).
- Explain the principles of basic programming logic (eg if/else statements, substring).

XMPie desktop tool skills

Required only if your training package is 3 three-hour online sessions. When the training package is 4 three-hour online sessions, the skills listed below are taught during the first training session.

Participants should be able to use one of the following XMPie products uCreate Print Standard (part of the uDirect packages), uCreate Designer or uCreate Print professional to:

- Create VDP (print) templates using which include a variety of dynamic objects types.
- Recognize, create and use different types of ADOR objects and script their expressions.
- Understand and use various advanced features and functions (eg copy fitting, dynamic print).
- Generate dynamic print files for a range of database recipients in different VDP output formats.

Please reference the uDirect Classic Training CED for more information. It is recommended that new users of XMPie desktop tools purchase [additional](#) training session(s) to fulfill this requirement as needed.

General computer skills and internet knowledge

The Adobe creative tools, and XMPie uCreate Suite (uCreate Print and uCreate Digital) are compatible with both Microsoft Windows and Apple Macintosh computer systems. XMPie uPlan is a 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 your production printers.

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

Because personalized sites exist on external/internet environment, an understanding of basic internet protocols is required (eg DNS, SMTP, FTP, HTTP).

Using our new technology (Open XM) allows for personalizing web sites outside of our default web server and setup (ie using IIS on the XMPL Server). Therefore, using other technologies for hosting personalized websites requires knowledge of web site administration including but not limited to web request redirection applications (as needed) and server-side scripting applications.

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 time restrictions scheduling the appropriate person. Please contact your XMPie Account Manager for further information.

XMPie uDirect tutorials

The 3 three-hour online sessions agenda, assumes you've already completed an introductory level training using uCreate Print (also known as uDirect Classic training). However, it is recommended for all participants to work through some of our tutorials. We suggest starting with the **uDirect "Open House" (aka Classic) Tutorial** (for EDU) to learn how we create and place dynamic content into templates.

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

The training's first module has overlapping topics with the basic tutorials. Performing the suggested tutorial before this training will provide an opportunity to maximize time with the trainer on the other topics or more advanced topics and to discuss any questions raised during your self-study.

Required facilities and equipment

Room requirements

For maximum value, training should be conducted in a quiet room away from production equipment or office areas.

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

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

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

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

Usually there are no breaks unless the training hours are scheduled back-to-back.

XMPie e-Media Cloud, Circle and XES setup

Before training can commence, the XMPie PersonalEffect e-Media Cloud, Circle and XMPie Email Services accounts need to be setup and the user should have their access credentials.

Network, printer and internet access

Connection to the internet is required to access the e-Media Cloud Server applications, download the XMPie desktop software installers (if needed), to view sample campaign websites and to connect the uCreate Suite desktop tools to the XMPie Circle and uProduce server used during training.

Please have a list prepared of the URLs and passwords to access your Circle Account, uProduce dashboard, Marketing Console, and the details of any printer/rip that will be used to test print output during the training.

Site	URL	User or Admin (if not default)	Password (if not default)
		<i>(ex. admin1)</i>	<i>(ex. p@ssw0r4)</i>
Circle	http://xmcircle.com		
uProduce Dashboard	<i>(ex. http://servername_or_IP/xmpiedashboard)</i> http://	<i>(ex. user1)</i>	<i>(ex. p@ssw0r4)</i>
Marketing Console	<i>(ex. http://servername_or_IP/marketingconsole)</i> http://	<i>(ex. user1)</i>	<i>(ex. p@ssw0r4)</i>

Other

Computer and software

All participants must have their own computer, or access to a computer for this training. The computer can be Macintosh or Windows operating systems, however there must be at least one workstation with Windows in order to learn and use uPlan.

Adobe applications required during this course include:

- InDesign Creative Cloud 2015
- Dreamweaver Creative Cloud 2015

For the purposes of training, it is 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. See the [Prerequisites and preparation](#) section for a more detailed list of skill sets.

It is also recommended to have the XMPie Desktop tools installed prior to training. If participants will not be using their own computer for training, we can issue 30-day trial licenses for training purposes. To obtain these temporary licenses, please contact XMPie Support, support@xmpie.com, or your trainer prior to training.

Course agenda

The following agenda is provided as a guide only. The pace of the course may change depending on the skills, experience and progress of the participants.

Session 1

Module Activity	Duration	Audience
Setup Your instructor will need some time to verify and check access to your e-Media Cloud Server, check desktop installations, etc. Please refer to Required facilities and equipment .	.5 hour Anytime before the training.	Instructor and network administrator
Module 1 - Introduction and overview This introductory module is an overview of XMPie eMedia Cloud and its various software components. Along with an overview of cross-media concepts, an explanation of the terms and concepts that will be used during training will be included. Performance Objectives: At the completion of this training, the trainee will be able to: <ul style="list-style-type: none">● Understand what will be covered during training.● Discuss industry terminology.● Describe XMPie (product) workflows.● Understand the basics of ADOR technology.● Explain what is cross-media and why we need it.● Review campaign planning.● Discuss and learn the different workflows for printing VDP documents vs emails and response URL pages.● Distribute and review the tutorial files.	0.5 hours (topics discuss as needed).	Everyone is invited to this presentation.

Module Activity	Duration	Audience
<p>* Modules 2 through 5 are for Print Only Workflows *</p> <p>These modules are given only as part of the 4 three-hour session (12 hour) agenda. See the section on Duration and delivery for more information.</p> <p>Their lessons are an introduction of ADORs (or Content Objects) concepts, how they are scripted and/or mapped to the data source and how and when they are used, in addition to generating VDP output. The remaining modules in this agenda continue the with how ADORs are used with personalized web pages and email, along with the procedures for setting up cross-media campaigns.</p> <p>If you already know the material in these modules, it is good to have a Q&A or short review with your instructor, before moving to Session 2. If you training package was 3 three-hour sessions, you should still have a quick review of these modules, to cover any questions you might have about ADOR types and their use.</p>		
<p>Module 2 - Using uCreate Print panel</p> <p>This module will start the hands-on training using the uCreate Print Standard (aka uCreate Print) panel by introducing the panel and its basic use:</p> <p>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 uCreate Print panel. ● Locate and reference the user guide documentation (help). ● Understand how ADOR values are based on the linked data and business rules, view data values within the panel. ● Place Text ADORs and use the copy fitting (text) feature. ● Use common features available on the panel, such as searching for longest or shortest names, turning on/off the data values and using highlight with InDesign screen modes. 	<p>30 minutes</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.

Module Activity	Duration	Audience
<p>Module 3 - ADOR / Content Object types</p> <p>This module builds on the last to introduce the other ADOR types.</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"> ● Explain and use the different ADOR types. ● Change Text ADOR objects to other ADOR types. ● Discuss why and how to set the asset source location. ● Explain the difference between assets and resources. ● Place graphic ADORs into the design and use fitting modes. ● Discuss using in-line graphics (e.g. letter signatures, logos, highlights) that flow with document text. 	30 minutes	<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 4 - Use the Rule Editor and Audiences</p> <p>This module shows how to create new ADOR objects and introduces the rule editor and how to build business rules/ logic.</p> <p>Performance Objectives:</p> <p>At the completion of this training, the trainee will be able to:</p> <ul style="list-style-type: none"> ● Create and use new ADOR objects of various types. ● Create and use the Audiences feature. ● Use the Rule Editor to modify logic used to calculate ADOR object values. ● Use common built-in functions including if/then statements. ● Place and/or assign different ADORs types to the design layout. ● Use other common features such as suppressing blank lines, previewing different recipients (validate rules), etc. 	30 minutes	<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.

Module Activity	Duration	Audience
<p>Module 5 - Generate dynamic output</p> <p>This module explores generating print-ready output for multiple recipients.</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"> ● Locate and use the Dynamic Print dialog to generate output. ● Explain the difference between different VDP output formats. ● Use simple imposition and other basic dynamic print features. ● Use advanced printing features, such as document bleed. ● Explain how transparency and other features affects print performance. 	30 minutes	<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.

Session 2

Module Activity	Duration	Audience
<p>Module 6 - Campaign planning and resource setup</p> <p>Creating a cross-media campaign requires planning and setup, this module covers those topics.</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. ● Use Circle to create a new project: <ul style="list-style-type: none"> » Login and plan the campaign flow » Understand and use the different nodes (touchpoints, enhancers and actions) to storyboard a campaign (. » Understanding the differences between projects and flow patterns » Saving a project ● Setup campaign for reviewers (if applicable) <ul style="list-style-type: none"> » Add design mockups for campaign reviewers » Invite reviewers and other collaborators » Post and read comments ● Analyze and adjust campaign resources, based on goals and requirements: <ul style="list-style-type: none"> » Review touchpoints, list the required ADORs and their business rules. » Review and adjust the data source to accommodate data capturing needs. » Review templates (print, web, email) and assets. 	<p>1 hours</p> <p>Participants may be limited in time in regards to hands-on for this module, some portions will need to be demo only.</p> <p>Participants may need to complete parts of the tutorial on their own..</p>	<p>Mandatory:</p> <ul style="list-style-type: none"> ● Print designers and/ or Web designers who will create the personalized web sites. <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.

Module Activity	Duration	Audience
<p>Module 7 - Creating the campaign logic</p> <p>There are three methods for creating cross-media campaign logic and each have different workflows in the beginning, then similar workflows toward completion.</p> <p>It is our recommendation to use Method 1 (uPlan) for any campaign. Method 2 works well for non-complex campaigns. Method 3 is best used when there are no print touchpoints within the campaign. Only Method 1 will be taught but the other methods can be discussed and demonstrated, if time allows.</p> <p>Method 1: Using uPlan (logic) and Circle (build)</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"> ● Use uPlan <ul style="list-style-type: none"> » Describe and use the uPlan wizard and application interface. » Create new and modify existing plan files. » Create various ADORs and script their QLingo expressions. » Create and use (plan) variables. » Create and use Audiences. » Save the plan and generate proofsets. ● Using Circle to build initial campaign components <ul style="list-style-type: none"> » Connect Circle project to uProduce » Upload the plan file » Upload the campaign data » Upload the assets » Set sample recipients <p>Method 2: Using Circle (auto-plan)</p> <ul style="list-style-type: none"> ● Discuss using Circle to build the campaign components <ul style="list-style-type: none"> » Connect Circle project to uProduce » Upload the campaign data and generate an auto-plan. <p>Method 3: Using Web CPKG from uCreate Print</p> <ul style="list-style-type: none"> ● Discuss using uCreate Print to generate to generate a web CPKG file to upload through Circle. <p>Method 2 & 3, Discuss changes to plan, and what is needed to complete the logic and build initial campaign components.</p>	<p>2 hours</p> <p>Participants may need to complete parts of the tutorial on their own.</p>	<p>Mandatory:</p> <ul style="list-style-type: none"> ● Print designers and/or Web designers who will create the personalized web sites. <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.

Session 3

PersonalEffect eMedia Cloud implements an XMPL server (part of our Open XM technology) which allows web designers and developers to use any software and their own sites to host personalized pages. During these modules, the trainer will use Dreamweaver and the uCreate Digital panels to develop personalized emails and websites while introducing the concepts and requirements of our cross-media workflow.

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.

Activity	Duration	Audience
<p>Module 8 - Creating email documents</p> <p>This module will look at setting up the email documents and activities for the cross-media campaign stated in Session 2.</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"> ● Using Circle, setup the email touchpoints (header, mailing list, and settings) ● Describe and use different methods to create and modify the email body text connected to the email touchpoint(s) within the Circle Library. <ul style="list-style-type: none"> » Use the online email editor through Circle » Use uCreate Digital: Email panel within Dreamweaver » Understand the different workflows for file management based on the method use to create the email. ● Describe the differences between Mass email and Triggered email setups. 	<p>.5-1 hours</p> <p>Participants may be limited in time in regards to hands-on for this module, some portions will need to be demo only.</p> <p>Participants may need to complete parts of the tutorial on their own.</p>	<p>Mandatory:</p> <ul style="list-style-type: none"> ● Print designers and/or Web designers who will create the personalized web sites. <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.

Activity	Duration	Audience
<p>Module 9 - Creating the personal website</p> <p>This module will look at setting up a personalized website using Dreamweaver and the uCreate Digital:Web panel.</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"> ● Linking to the Circle project ● Setting up the several personalized pages including the landing and thank you pages. ● Setting up and configuring web forms to update data and/or adding new records (eg refer-a-friend). ● Setting up tracking. ● Pushing and pulling of web page using DW. ● Using Circle to setup the Friendly URL and configuring the touch point. 	<p>.5-1 hours</p> <p>Participants may be limited in time in regards to hands-on for this module, some portions will need to be demo only.</p> <p>Participants may need to complete parts of the tutorial on their own.</p>	<p>Mandatory:</p> <ul style="list-style-type: none"> ● Print designers and/or Web designers who will create the personalized web sites. <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 10 - Creating the personalized print</p> <p>This module will look at setting up a personalized print invitation and/or coupon using InDesign and the uCreate Print panel and connecting to the live data on uProduce.</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"> ● Connect print campaign to PURL port (on uProduce) ● Place ADOR objects into the design ● Set additional dynamic options (like copy fit) ● Generate dynamic output. ● Discuss other methods to generate output, for example, downloading data and creating a new plan (as needed). 	<p>.5-1 hours</p> <p>Participants may be limited in time in regards to hands-on for this module, some portions will need to be demo only.</p> <p>Participants may need to complete parts of the tutorial on their own.</p>	<p>Mandatory:</p> <ul style="list-style-type: none"> ● Print designers and/or Web designers who will create the personalized web sites. <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.

Session 4

Activity	Duration	Audience
<p>Complete previous Modules</p> <p>This allotted time allows for completing the previous sessions, Q&A or review of assigned exercises.</p>	<p>Determined by the trainer and attendees based on previous session</p>	<p>Mandatory:</p> <ul style="list-style-type: none"> ● Print designers and/or Web designers who will create the personalized web sites. <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 11 - Tracking reports with Marketing Console</p> <p>This module covers the basic tasks in the Marketing Console application.</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 Marketing Console interface. ● Discuss administrative tasks and service levels. ● Discuss user roles. ● Use the pre-built tracking reports for print and web. ● Create, customize and save reports as charts and/or lists. ● Add charts to and arrange the dashboard, as needed. ● Analyze campaign statistics. <p>Advanced Objectives (as needed and if time permits):</p> <ul style="list-style-type: none"> ● Use the write-back feature with a list report for follow-up campaigns. 	<p>Remaining time ~ 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>Desirable:</p> <ul style="list-style-type: none"> ● Marketing or business managers who request the campaign's marketing information and goals.

Additional courses from XMPie

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

Onsite courses

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

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

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

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

Online courses

- uDirect Classic (1 x 3 hour)
- uDirect Studio (2 x 3 hour)
- uDirect Video (1 x 3 hour)
- PersonalEffect e-Media Cloud (3 x 3 hour - uDirect knowledge is a prerequisite)
- Introduction to XMPie APIs (1 x 3 hour)

Custom courses

In addition to the standard courses listed above, XMPie can deliver custom training tailored to your specific needs. Custom training is available from introductory to advanced levels and can even be used to fast-track your first campaign or store setup. Typically, API programming and custom application development are taught via custom training so we can focus on the specific programming language and project you have in mind.

The lead time needed for custom training is a little longer while we prepare the Statement of Work, agenda, and materials needed. Please contact one of our training professionals or sales consultants for more information.

Further information

For more information about XMPie Training courses, please contact:

- Your XMPie Reseller or Account Manager
- Or, email:

trainingNA@xmpie.com - for North American enquiries

trainingROW@xmpie.com - for enquiries from other regions

XMPie Sites

About and more...

- » <http://www.xmpie.com> - XMPie website has case studies, product brochures, and links to our other sites.
- » <http://blog.xmpie.com> - Articles and news from XMPie.
- » <http://twitter.com/xmpie> - Follow us on Twitter.
- » <http://www.facebook.com/xmpie> - Follow on Facebook. Our page includes a demo using our uStore's Facebook Connect application.
- » <https://www.linkedin.com/company/xmpie> - Follow us on LinkedIn.
- » <https://www.youtube.com/user/xmpie> - Our YouTube channel includes many brief videos and some sample of personalized videos.

XMPie Stores...

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

Circle and Support

- » <http://xmcircle.com/> - XMPie Circle, the link may change, please reference the letter you received when you signed up for this service - for free account, write to special@xmcircle.com for information.
- » <http://www.xmpie.com/support> - XMPie Support Portal (powered by SalesForce) is used for communication between customers and our support teams. You need an active account on this portal to register for the sites below.
 - » <http://campus.xmpie.com> - XMPie Campus, our eLearning and training hub for current XMPie Customers.
 - » <http://info.xmpie.com> - XMPie Information Portal with access to additional case studies, presentations, and much more.
 - » <https://github.com/XMPieLab/XMPL-sdk/wiki> - Home page for the XMPL-SDK, used to add personalization to your HTML pages.

Notes