

XM Pie Training

EDU Tutorial - Part 1 - Project planning

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A CareAR Company

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U.S. Patent 6948115, 7406194, 7548338, 7757169 and pending patents. JP Patent 4406364B and pending patents.

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About this tutorial

Congratulations on your selection of XMPie uCreate Print for your Variable Data Print (VDP) needs.

The XMPie EDU Tutorial is a series of tutorials that together will provide a thorough introduction to VDP techniques using Adobe InDesign and XMPie uCreate Print.

The EDU Tutorial is divided into different sections to enable you to quickly jump forward or backward to find help to learn different aspects of the product functionality:

- Part 1 - Project planning, preparation and gathering
 - Understanding the project
 - Checking the available data
 - Checking the available image and text file assets
 - Planning what content objects are needed to achieve the desired outcome
- Part 2 - Basic VDP job
 - Linking to your data source
 - Placing Text and Graphic Content objects into the InDesign document
 - Managing text copy fitting and dynamic graphic fitting
 - Creating your first VDP output
- Part 3 - Using rules and logic
 - Introduction to the Rule editor
 - Functions and how to use them
 - Creating rule or logic
- Part 4 - Introducing more content object types
 - Creating and using Visibility, Style and Text File content objects
- Part 5 - Barcodes
 - Creating and using print barcodes
- Part 6 - ulmage regular font effects
 - Creating a font-based ulmage template with Adobe Photoshop
 - Creating a ulmage Document Package
 - Optimization techniques
- Part 7 - ulmage image font effects
 - Creating an image-font-based ulmage template with Adobe Photoshop
 - Creating a ulmage Document Package
 - Optimization techniques
- Part 8 - Using the ulmage package in uCreate Print
 - Linking InDesign and uCreate Print to the ulmage package
- Part 9 - Table Content objects and uChart
 - Linking to secondary data sources
 - Table Content objects
 - Adding uChart to the document
- Part 10 - Working with uProduce
 - Creating Campaign- and Document-packages
 - Uploading packages to the uProduce Dashboard
 - Processing the document on the server
 - Working with Circle

Target audience

This tutorial is designed to provide basic information, step-by-step instructions, and sample materials for self-learning. Should you require more visual assistance, there are accompanying videos available at <http://campus.xmpie.com/s/uCreatePrint>.

At the end of this Tutorial, there are review questions, and suggested exercises to build on the skills outlined in the tutorial.

The content is designed for customers who have bought XMPie uDirect or PersonalEffect and wish to learn how to use XMPie's uCreate Print product to create document templates for VDP production.

It is expected that the reader will already have a basic working knowledge of Adobe InDesign. If not, it is recommended to first complete some basic InDesign training for example, courses with Adobe: <https://helpx.adobe.com/indesign/tutorials.html> or a 3rd party organization such as Lynda.com: <https://www.lynda.com/InDesign-training-tutorials/233-0.html>

Reference materials

- uCreate Print User Guide (Access via the help menu on the uCreate Print panel).
- uCreate Print Tutorial videos (Access at <http://campus.xmpie.com/s/uCreatePrint>)

Prerequisites

This tutorial assumes that you:

- Are familiar with Adobe InDesign,
- have a basic understanding of Excel or text-based data, and
- have a basic understanding of the aims of Variable Data Print (VDP).
- have Adobe InDesign CC2022 installed (trial version is acceptable)

Module 1:

Project briefing

According to Benjamin Franklin: "If you fail to plan, you are planning to fail".

This couldn't be more true for Variable Data Print (VDP). You need to understand the aims or expected outcome of the project. You need to know what data and assets you have available, and plan how to handle different scenarios that may come up due to different combinations of data, rules, assets and resources. For example, what happens if one or more records doesn't have a value that you need for your rules and logic?

In this module, our customer - EDU University - gives us details of the job they want us to complete, and in the following modules, we look through the resource materials provided by the customer and start to plan the work that we need to complete over the next few Tutorials.

While this tutorial is not "Hands-on" as such, it lays the ground work for the following tutorials, and understanding the planning steps involved will dramatically help you to make your future VDP projects quick and painless to setup as well as successful.

Duration

About 5 minutes

Objectives

After completing this module, you will be able to:

- Understand the customer requirements for the EDU Open House project.

Information

The event

The EDU University hold an annual open day event to engage with prospective students. University placements are extremely competitive and it is critical that the university attract the required number of students in order to receive ongoing funding. Additionally, it is important to attract students with higher grade averages.

The print invitation

The print invitation will be one of several methods used to attract prospective students to the event. The university has the following design requirements:

- Needs to provide relevant information. - Where we know the prospective student's preferred School, we should provide only information about that School to simplify the messaging and make it more relevant to the student.
- Needs to conform with design requirements (eg highlight color should be the School color)
- Should be attractive and engaging - do something to capture the prospective student's attention and cut through the mail box clutter.
- Promote incentives to students with high grade averages. For example, mention scholarships to students with a grade average above 85.

- The university wants to encourage prospective students to apply during the open day and will offer a discount of 15% off application fees during the open day.
- Engineering students traditionally prefer a different university. We want to encourage new Engineering students by offering a higher (20%) discount on application fees.

Success measures

Overall the success of the open day will be the number of prospective students who arrive at the university, and eventually by the number of new student enrolments.

The success of the print invitation will be measured by the number of hits received to the open day website, so a specific URL must appear on the document.

Module 2:

Reviewing/gathering resources

Now that we understand the basic aims of the project we can start to look through the provided materials - or in the case of your own projects you can start to gather the required resources.

Duration

About 10 minutes.

Objectives

After completing this module, you will be able to:

- Evaluate the sample data provided by the customer with regards to planning the rules and logic needed to complete the project requirements,
- Identify the required asset images and text files needed to complete the project requirements,
- Review the document design provided by the customer.

Information

Tutorial files

The resources zip file for this tutorial series includes the following files. You can download the zip file from the Downloads tab on any of the Tutorial modules at <http://campus.xmpie.com/s/uCreatePrint>.

Name	Date modified	Type	Size
assets	18/08/2017 9:37 AM	File folder	
images	25/09/2017 8:45 AM	File folder	
Engineering.pdf	27/08/2016 4:53 PM	PDF File	342 KB
General.pdf	27/08/2016 4:52 PM	PDF File	1,068 KB
Law.pdf	27/08/2016 4:50 PM	PDF File	266 KB
Medicine.pdf	27/08/2016 4:49 PM	PDF File	394 KB
text files	18/08/2017 9:37 AM	File folder	
general-schedule.txt	19/09/2016 9:10 AM	Text Document	23 KB
Law open house schedule.txt	19/09/2016 9:14 AM	Text Document	23 KB
medicial - OpenHouse Schedule.txt	19/09/2016 9:21 AM	Text Document	23 KB
Open House engineering schedule.txt	19/09/2016 9:18 AM	Text Document	23 KB
resources	18/09/2017 8:45 AM	File folder	
edu logo.pdf	2/09/2016 6:05 AM	PDF File	6 KB
edu-smaller.pdf	25/08/2016 7:40 PM	PDF File	2,463 KB
graduation-smaller.pdf	4/09/2016 10:52 AM	PDF File	3,426 KB
library-small.pdf	4/09/2016 10:45 AM	PDF File	1,542 KB
meetingroom.pdf	4/09/2016 6:11 PM	PDF File	772 KB
XMPieLogo.pdf	4/09/2016 6:58 PM	PDF File	4 KB
EDU Postcard CC2022.indd	22/07/2022 12:15 PM	InDesign Document	2,108 KB
EDU Static.idml	19/09/2016 4:27 PM	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

Project data

The university has provided two CSV data files for the project.

The main recipient information is in the EDU201x Prospective Students.csv file. The data looks like this:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	FirstName	LastName	StreetAddress	StreetAddress2	City	State	ZipCode	Gender	School	GradeAvg	EmailAddress	BirthDay	PURL	IMBSample	SortID	Tray	Marker
2	Salvador	Randolph	866 Hilltop Street	Apt 23	Wilbraham	MA	01095	m		89	SalvadorR@somefakeaddress.com	5/5/1993	Salvador.Randolph.744	123456789012345678901234010951234	1	1	#
3	Chi	Cotton	588 Frank Avenue		Springfield	MA	01103	f	Engineering	83	ChiC@somefakeaddress.com	1/30/1992	Chi.Cotton.972	123456789012345678901234011031234	2	1	
4	Lauretta-Leigh	Navarrete	4899 Trouser Leg Road	Unit 2	Springfield	MA	01103	m	Engineering	95	Lauretta-Leigh@somefakeaddress.c	9/16/1993	Lauretta-Leigh.Navarrete.208	123456789012345678901234011031234	3	1	
5	Yolanda	Tourville	1411 Kennedy Court		Worcester	MA	01610	f		87	YolandaT@somefakeaddress.com	2/27/1992	Yolanda.Tourville.378	123456789012345678901234016101234	4	1	
6	Rita	Nock	840 C Street		Framingham	MA	01702	f		83	RitaN@somefakeaddress.com	8/6/1984	Rita.Nock.869	123456789012345678901234017021234	5	1	
7	Dorothy	Beaumont	2835 Smith Street	Level 4	Framingham	MA	01702	f		76	DorothyB@somefakeaddress.com	12/18/1993	Dorothy.Beaumont.377	123456789012345678901234017021234	6	1	
8	Anthony	Britton	132 Russell Street		Acton	MA	01720	m		81	AnthonyB@somefakeaddress.com	4/5/1986	Anthony.Britton.338	123456789012345678901234017201234	7	1	
9	Jenny	Race	3067 Pearlman Avenue		Bedford	MA	01730	f	Law	94	JennyR@somefakeaddress.com	4/18/1992	Jenny.Race.914	123456789012345678901234017301234	8	1	
10	Maria	Price	2636 Rainy Day Drive		Woburn	MA	01801	f	Law	94	MariaP@somefakeaddress.com	9/15/1981	Maria.Price.164	123456789012345678901234018011234	9	1	
11	Alta	Smith	4230 Tenmile Road		Burlington	MA	01803	f	Law	79	AltaS@somefakeaddress.com	6/13/1990	Alta.Smith.104	123456789012345678901234018031234	10	1	
12	Gwendolyn	Hernandez	3971 Hampton Meadows		Haverhill	MA	01830	f	Law	82	GwendolynH@somefakeaddress.coi	4/16/1996	Gwendolyn.Hernandez.143	123456789012345678901234018301234	11	1	
13	Michelle	Labrecque	1698 Levy Court		Lawrence	MA	01840	f	Law	100	MichelleL@somefakeaddress.com	8/7/1981	Michelle.Labrecque.766	123456789012345678901234018401234	12	1	
14	Angie	Mifflin	1982 Hampton Meadows		West Newbury	MA	01985	f		87	AngieM@somefakeaddress.com	7/26/1987	Angie.Mifflin.578	123456789012345678901234019851234	13	1	
15	Michael	Danek	1554 Huntz Lane		Foxboro	MA	02035	m	Engineering	91	MichaelD@somefakeaddress.com	8/29/1988	Michael.Danek.047	123456789012345678901234020351234	14	1	

	A	B	C
1	School name	year	score
2	Medicine	2014	85
3	Medicine	2015	87
4	Medicine	2016	93
5	Engineering	2014	81
6	Engineering	2015	81
7	Engineering	2016	85
8	Law	2014	95
9	Law	2015	93
10	Law	2016	90
11		2014	75
12		2015	80
13		2016	73

There is also a secondary database called EDU_Scores.csv which contains information about the Grade Average required for admission to the different schools over the past couple of years.

Review the project objectives and check that we have the necessary information in the database to achieve the required outcomes? For example:

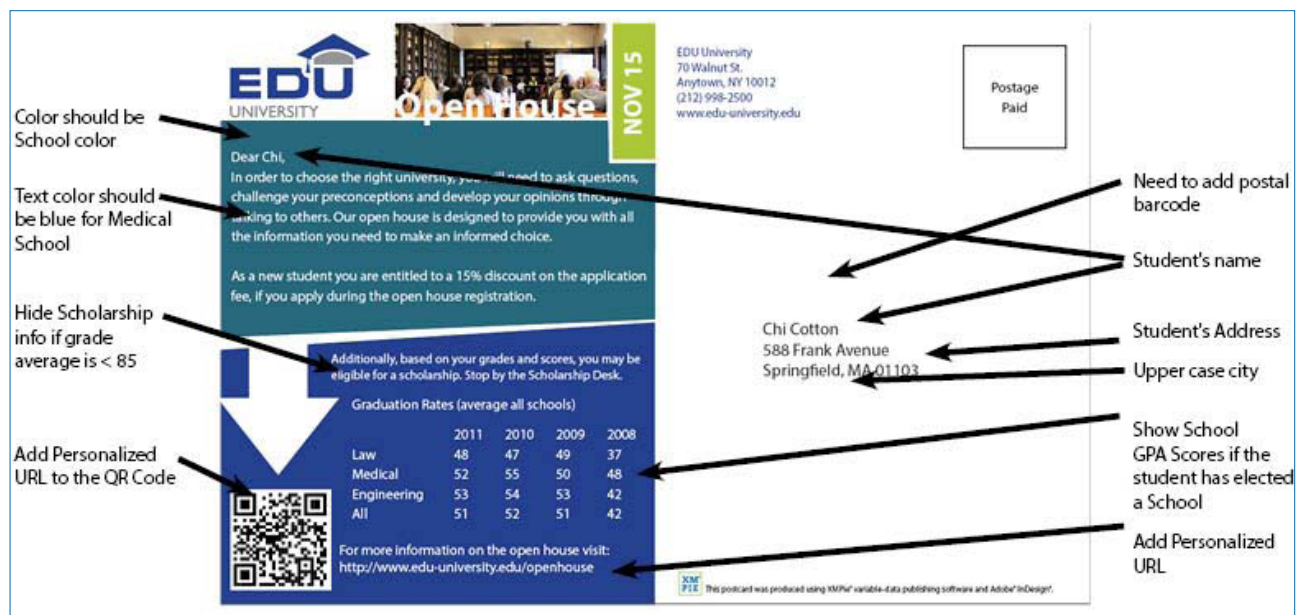
- To change the discount offering for students interested in studying with the School of Engineering, then the data needs to include the selected School.
- To promote the scholarship program to students with a high grade average, then the data needs to include the grade average information.

Sample InDesign document

The university has provided a static InDesign document, together with logos and linked images

Given the brief provided, the following images show the dynamic document changes that we need to implement:.





Open and review the InDesign document.

Check fonts and linked images.

Notice that Styles and Layers have already been prepared - this is very helpful - especially for the School colors to already be setup in the Object styles, otherwise we would have to ask for this information.

Asset images

The university has provided some images to represent each School. We need to check the image sizes are large enough to provide enough quality to print. On the other hand, we need to check that they are not excessively large. Large asset images will result in slow production/composition, large print files, and slow printing.

Are the images the best file type for the print output format we will use? uCreate Print will work with many asset image types, but the best image type for production/composition performance varies depending on the type of output form we want to create: PDF production is native, so PDF assets work best. For PostScript/VIPP/VPS production, EPS images are the most efficient.

Since we want to change the asset image based on the School in the database, we need to check what values are in the School field of the database. Do we have an image for each School? Are all the values in the School field named consistently? What image will we show if there is no School listed in the database?

Asset text files

The university has provided the Agenda of the open day events as text files that can be added to the InDesign document design.

There are different text files for each School, so there will need to be a rule to get the correct file for each School.

Also, you can see that the text files are not named as neatly as the asset images. We need to decide if we will rename the files or write a rule to select the relevant file for each School.

Again, same as the Asset images, the rule will need to be able to select the general agenda when there is no School selection in the database.

Module 3:

Planning your Content objects

Now we have a better understanding of the project requirements, the data available, and what materials we have to work with, we can start to plan what Content objects are required to change the document in a way that meets the project requirements.

It also give us a change to start to think about the rules required, and to think about

Duration

About 10 minutes.

Objectives

After completing this module, you will be able to:

- Create a list of the Content objects that are required to meet the project requirements,
- Select the Content object types that are needed,
- Note down the basic rules/logic that will be required, and
- Note down things to be cautious of or to check in the document design.

Information

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		
StreeetAddress2	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.
ulmage	Graphic		Use the ulmage 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.