

# Training Course Outline

## XmPie uDirect End User

**Course Name :** XmPie uDirect Course for End Users

**Course Code :** PEUDCUSTED 1/2 day install and training for uDirect Standard  
PEDECUSTED 1 day install and training for uDirect Professional

**Location :** On customer site

**Time :** ½ day to 1 day (time set to suit schedules)

**Facilitator :** Local Analyst or National Facilitator

### Objective

*The objective of the XMPiE uDirect customer-training course is to provide participants with vital understanding of the concepts for uDirect. XMPiE uDirect, a plug-in to Adobe® InDesign® that is used for creating variable data print documents. The training program is intended to teach you how to use uDirect allowing designers to use their current Adobe InDesign skills to create Dynamic Documents, by linking the InDesign document to a Data Source (e.g., an Excel sheet), and associating fields from the Data Source—directly, or via Rules that compute values—with data-dependent areas of the document (e.g., a picture of a product that needs to be changed based on a person's marital status). The tight and seamless integration with InDesign (Windows or Mac OS) makes the transition from designing for Static Documents to designing for Dynamic Documents a painless process, and it preserves the designer's full creative control for both types of documents, from beginning to end. . The course is intended to augment basic learning, by providing practical hands-on training.*

### Pre-requisites

- Mandatory requirements before training may begin: - The purchaser, Xerox account manager and the Xerox analyst/Customer Education Facilitator must nominate an in-house (from client site) product specialist for the account. This person's role would then be utilised within the company as the first point of contact for troubleshooting, and to communicate with the Xerox account analyst at a higher degree of competency.
- Ability to confidently navigate and perform standard windows, desktop & application functions without procedural instruction.
- Familiarity with networked workstations and file directories.
- Current Adobe® InDesign® application experience
- If a participant cannot perform the above tasks: - A course in the appropriate operating systems for Windows or application software is mandatory before attending.
- These courses are available through external training institutes. Please contact your local Facilitator for details.

## Course Content

The course has been designed into bite-sized modules. This allows the content of each module to be conducted at a pace suitable to the trainee. The entire course has Five (5) modules.

### Module 1 Introduction to uDirect

At the conclusion of this lesson, you will be able to:

- Describe the capabilities of uDirect Standard and Professional
- Access the application
- Navigate Palette Menu & Tool

Duration of module : 1 hour

### Module 2 - Working with Content Objects

At the conclusion of this lesson, you will be able to:

- Link a document to a data source
- Define content objects by adding, and editing content objects by using the rule editor
- Import rules from other documents
- Rename & change object types
- Duplicate and delete content objects.
- Tag design objects with content objects (text, graphic & tables)
- Using visibility content objects
- Adding and removing style content objects

Duration of module : 1 hour

### Module 3 - Dynamic Properties of Design Objects

At the conclusion of this lesson, you will be able to:

- Formatting dynamic:
  - Text properties,
  - Text file properties,
  - Story properties
  - Graphic properties

Duration of module : 1 hour

### Module 4 – Working with the Dynamic Document

At the conclusion of this lesson, you will be able to:

- View dynamic data content
- Use values from a data source and proof set
- Create a proof set
- Set the location of assets
- Generate an exchange file – using Xlim
- Import a complete campaign
- Import formatted text into a design
- Preview a submitted job.

Duration of module : 1 hour

## Module 5 – Printing the Dynamic Document

At the conclusion of this lesson, you will be able to:

- Create a print file of a dynamic document
- Set common dynamic print elements
- Apply policies
- Set copies, step & repeat settings
- Direct specific variant of your output format, to suit the workflow and the specific print controller you are using

Duration of module : 1 hour

- Students will be given a project to complete at the end of each module. The project will be based on workflows, concepts, theories and exercises learnt throughout the course. The project will be completed under the guidance of the instructor with the emphasis on “real life” application.
- On successful completion of each project together with completion of a task/features checklist, students will be issued with a certificate of competency.

To book your place, please contact Education Services Administrator on 02 9700 5691 or e-mail [Customer.Education@aus.fujixerox.com](mailto:Customer.Education@aus.fujixerox.com)



Environmental Statement:

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