

Course 110 :: **Dialogue System Administration**



Product :: **Dialogue 5.0**



Introduction

This course is offered with this project guide which provides a scenario for each unit's exercises.

The Scenario

Recently, Vivanet has purchased a Dialogue site license for several corporate departments, including your own. Although you have some experience working with Dialogue in a design capacity and are familiar with the basic tasks, this will be your introduction to Dialogue system administration.

You will be working with the Project Manager, John Blake. At the beginning of each unit, he will send you an e-mail describing what needs to be done. The e-mails usher in the next phase of the administrative lessons, and the exercise you perform are designed to meet these requirements.

Note

The organization of Vivanet is fictional, as are all of its employees. The organization and its personnel are referred to here simply as examples for this course's exercises. Any resemblance to an existing company or personnel is unintentional and coincidental.



Unit 2: Installation and Initial Settings

UNIT 2: INSTALLATION AND INITIAL SETTINGS

Scenario

You arrive at work this morning to find a new e-mail in your inbox.

Directions: Highlight the requirements and circle the information needed to create this communication.

John Blake

Subject: Dialogue Installation and Setup

Hi there,

My name is John Blake, and I work in the Sales Division of Vivanet. I know we haven't formally met, but I'm delighted to be working with you on this project. We have purchased Dialogue, and I want to introduce this excellent product to each manager at Vivanet. Specifically, by giving demonstrations of this product: demonstration that you will prepare. I have confidence that you will be able to get us running on Dialogue quickly and efficiently.

First, it's up to us to get the application up and running. I've taken the liberty of downloading the Exstream Dialogue Installation file from Exstream's website, uncompressing the file, and running the installer on this computer. That is as far as I have gone.

I've noticed that there are some existing databases in the directory. Therefore, the first thing I want you to do is to make a copy of "EmptyExstream.mdb" database and call it "Vivanet.mdb." Then move it to the **C:\110 Dialogue System Administration** directory. We can always go back to the old EmptyExstream database if something bad happens. Let's also set up a Data Source Name in Windows for this new database. This will come in handy for fast logins, so we don't have to browse for the database each time we want to connect. Also, update the database with **UpdateDB.exe** before you actually log in.

Once our Vivanet database is all set, go ahead and log in. I seem to recall an ADMIN profile, but I don't remember the password. Check the README.TXT document for that.

Once you are in, have a look around. I've been told that we have considerable control of features through the system configuration. Please be prepared to show me how to use this feature.

I will come by later this morning to have a look at what you have accomplished. Good luck!

John Blake

Project Manager
Vivanet Communications
100 Viva Way
PO Box 100
Lexington, KY 40410
800-555-4444
pferis@vivanet.com

Unit 3: Setting Up the System Environment

UNIT 3: SETTING UP THE SYSTEM ENVIRONMENT

Scenario

Directions: Highlight the requirements and circle the information needed to create this communication.

John Blake

Subject: Adding Users to Dialogue

First things first: we need to add some users. Attached is the new organization chart. Add the heads of the departments: Fred Drake, Jim Smith, James Wilcher and Steven Maxwell. Use their last names as the passwords, and add their e-mail addresses, which are in the format of (lastname)@vivanet.com. So my e-mail would be blake@vivanet.com. Then, separate the new users into groups based on the departments.

It is probably wise to have a backup administrator, in case you are out sick or on vacation. Set up your assistant, Roy Ferris, as an administrator as well.

Next, go ahead and create a work area for each design group. Become familiar with the Dialogue access levels and then set up the access so that everyone can see all items in other areas, but only the group based out of that area may modify or create items in that folder. There's no reason for Marketing to be messing with data files. So turn off data dictionaries and data files in that work area.

Once that is all set up, enable the approval system.

I have also been reading up on the Enterprise Approval features. We can build some very impressive approval systems of our own! First, create a folder to test the approval process. Then, go to the folder and create a three-part approval process, which goes through three stages, Draft, Edit and Final. Add them to one approval process, set yourself as the approver for each stage, and apply the approval process to the folder. Then, send a sample paragraph through the approval process.

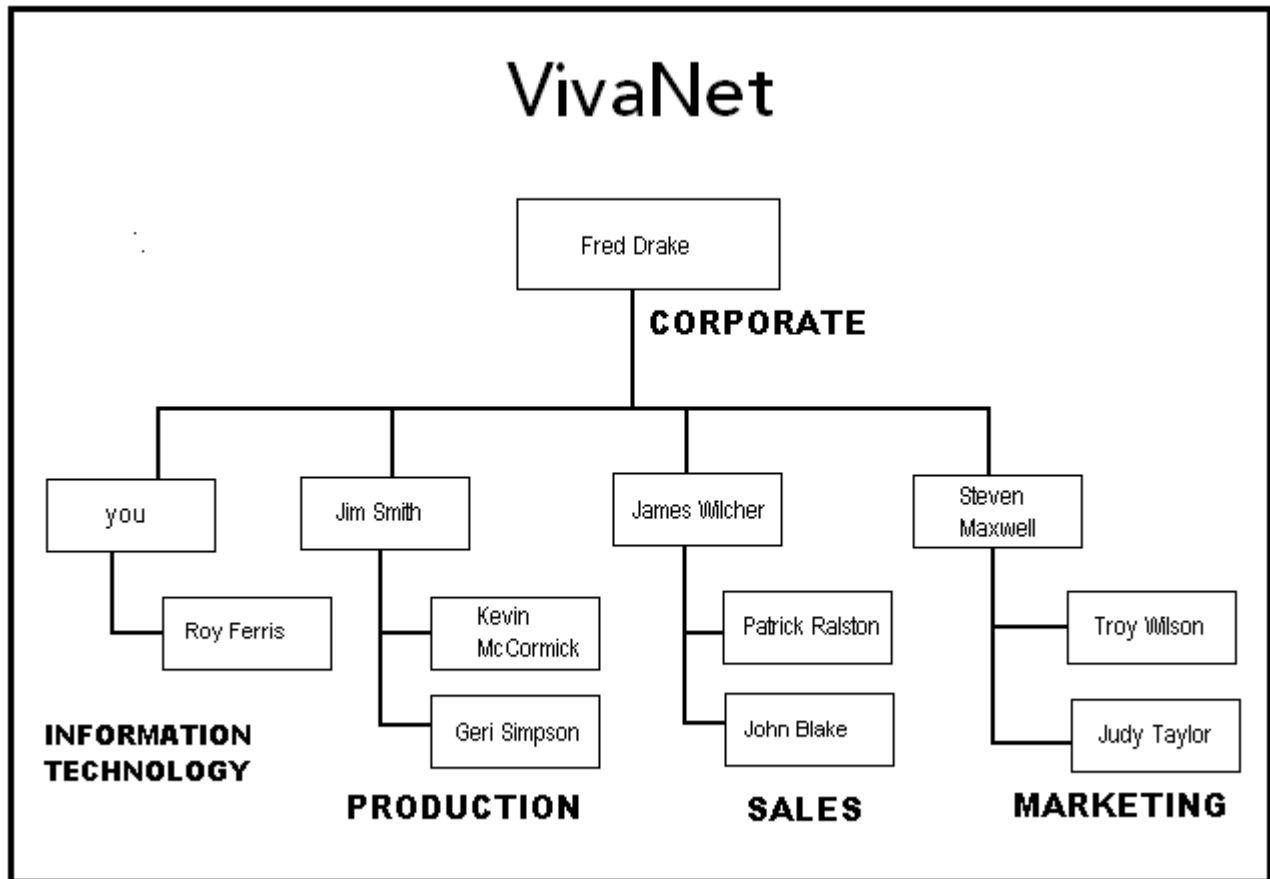
Good news! We have obtained our first international client. Next week, we will begin working with Presidente Communications in Mexico City. Can Dialogue be used to make things easier for our Spanish-to-English translators? I'll send along a list of some terms that may help.

Finally, we are going to diversify our service in Kentucky. Each of the three major cities will feature different services. I recall hearing that jurisdictions would be excellent to deal with the different laws and contracts for each state, but I do not understand enough about it yet. Can you give us a rundown on why we could use it? How is it different from system rules?

Thanks. I'll be by later to see what you have!

John

Organization Chart attachment overleaf



John sends you the following table:

DAYS OF THE WEEK (ENGLISH AND SPANISH)

Sunday (Sun)	Monday (Mon)	Tuesday (Tue)	Wednesday (Wed)	Thursday (Thu)	Friday (Fri)	Saturday (Sat)
Domingo (Dom)	Lunes (Lun)	Martes (Mar)	Miércoles (Miér)	Jueves (Jue)	Viernes (Vie)	Sábado (Sáb)

MONTH (IN ENGLISH)	MONTH (IN SPANISH)
January (Jan)	Enero (Ene)
February (Feb)	Febrero (Feb)
March (Mar)	Marzo (Mar)
April (Apr)	Abril (Abr)
May (May)	Mayo (May)
June (Jun)	Junio (Jun)

MONTH (IN ENGLISH)	MONTH (IN SPANISH)
July (Jul)	Julio (Jul)
August (Aug)	Agosto (Ago)
September (Sep)	Septiembre (Sep)
October (Oct)	Octubre (Oct)
November (Nov)	Noviembre (Nov)
December (Dec)	Diciembre (Dic)

Attached to the table is the following note:

- In Mexico the 28-12-2005 date notation is used.
- The current peso-to-dollar exchange rate is 0.09.
- In Mexico please separate thousands places with periods (like 1.000).
- They use commas for decimals (like 0,02).
- Use (1\$) for negative currency notation (like (5\$)).
- Use 1\$ for positive currency notation (like 15\$).
- The currency notation is set to 2 digits.
- Use 2 digits for the default floating format.
- Use the comma for default decimal floating format.
- Use "-xxx.xxx" for the negative floating format.

- Thanks!

John

Unit 4: Setting Up the Design Environment

Scenario

John Blake

RE: Design Environment

Great work! We are all set with the design users and design groups. I was showing off your work to Steven Maxwell, in Marketing. While he was very impressed, he reminded me that we need to make sure that our marketing guidelines are enforced for all of our users. I have a task list that Steven and I jointly built. This should keep us in Marketing's good graces for style, design and presentation.

For starters, Marketing has revised our style sheet. Attached are the new guidelines. Create the style sheet, and make sure it is enforced. To be safe, set the system design defaults to follow the styles as much as possible.

It seems like we're using a new font face for the style sheet's new headings: Verdana. You will have to import this font, but restrict it to sizes 11, 12 and 14, and do not allow strikethrough. Make sure the system has the Times New Roman font installed, as well. We do not need any restrictions on Times New Roman.

Next, Steven was a bit concerned about inconsistent use of color. For our Vivanet logo, our designers will need to use our logo's distinctive blue and light blue colors. Attached is information for our signature colors. Make sure that everyone is using those exact colors!

Production has recently been experimenting with our Pinnacle Page type with our logo pre-printed up top.

Once that is in place, we need to start our template library. Why don't we start with a correspondence letter template? Steven and I have hammered out a rough sketch of what we would like, which is also attached. Also, we are going to be using the Pinnacle Page printer paper from now on. It's a standard 8.5 x 11 white stock printer sheet, 0.220 ounces. Enter this into the system, would you?

On top of the document templates, we also need some message templates, ready-made message starters we can just drop into any document. Marketing will handle this kind of stuff, but we want to build them a prototype to show them how it is done. How about creating a 4" by 2.5" special promotion message? I'll send you a graphic to include in the message (place it at 1.125 horizontal x 0.125 vertical), and include the text "A new offer for our valued Vivanet customers:" Once you've built the template, create a message with it to prove that it works.


Steven and I will swing by later in the day, and you can show us our new design environment. I know you'll have something special waiting for us!

John

See the next page for the attachments.

You receive these documents from John:

Style Sheet Summary:

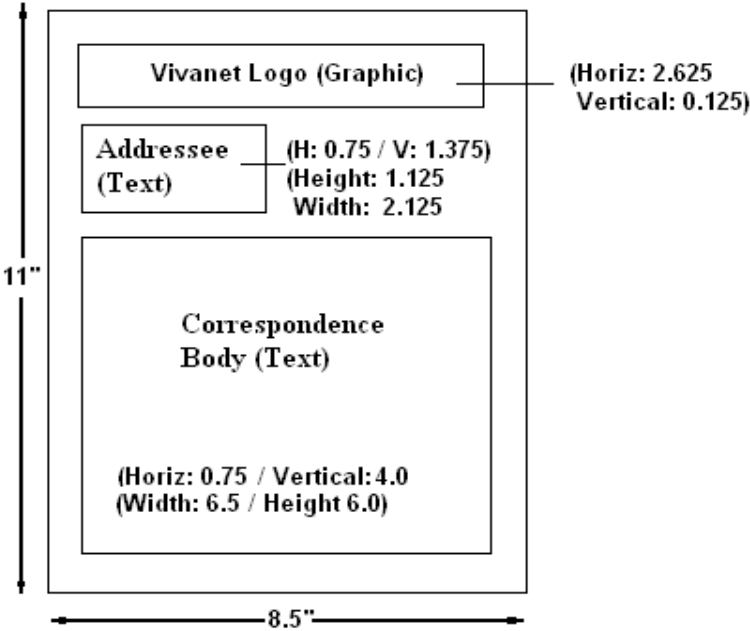


Heading 1
(Veranda, 14 point, bold, underlined)

Heading 2
(Veranda, 12 point, italics)

Body Text
(Times New Roman, 11 point)

Correspondence Template Summary



Soon afterward, you receive this email:

Steven Maxwell
RE: VivaNet Color Codes

Hello. John asked me to send you the VivaNet color codes.

The codes are:
Vivanet Blue: CMYK - 63/63/0/37
Vivanet Light Blue - 20% of Vivanet Blue.

Good luck!

Steven

Unit 5: Setting Up the Delivery Environment

Scenario

John Blake

Subject: Delivery Environment

Great work! Marketing was very pleased with the Design Environment that you set up. In fact, yet another department has started to take notice of our work. Jim Smith from Production is now very interested in Dialogue and what it can do for Vivanet. So, I propose we give him a big demonstration of Dialogue's production power.

First, let's add some output devices so we can create things for production. Add both hard copy (a gray scale, duplexing PostScript driver printer) and soft copy (full color PDF) output devices. That should show him we can easily make PDFs, or crank out hard copies.

Jim tells me that Production will soon get a brand-new Series 14 inserter. Let's add that to the system. It uses a special 3 of 9 barcode. I'll send you the details about this code later, but it needs to be added for the inserter. Create a banner page to mark the end of a queue, and make sure the page indicates which queue it ends. Take the whole thing and set up an output for the printer and the inserter, including the barcode and the banner page. Call it "Vivanet Printer Output Queue."

I think that the Sorting and Bundling Module, and the Application Consolidator would be a great boon for our company. Imagine the time we'd save pre-sorting our output and packaging many applications at a time! Be prepared to explain the benefits of these modules to Mr. Smith.

Finally, we should show him how to run the engine. I will provide a package and data file in your **C:\110 Dialogue System Administration** directory. Please use a control file to indicate the output will be a PDF called ExstreamOutput.pdf. Once we demonstrate the engine run, let's show him the text file generated.

Thanks! I know we're going to impress him.

John

See the next page for the barcode details.

John sends you the following information about the barcode:

Standard 3 of 9 Barcode

- Only inserters may reference this barcode.
- Upper Left (portrait) Placement Reference.
- Placement: 2.350 Bottom, 8.100 Left, 0.18 Height.
- Orientation: Face right.
- This barcode is based on the 39251 font.
- HRI Font: Arial 4.0 point.
- HRI Placement Below
- HRI Orientation: Face right.

The barcode needs to be mapped to the following things, in this order:

- Document in break - 5 digits long.
- Page in document - 1 digit long.
- Total pages in document - 1 digit long.
- Checksum: Base - 1 digit long.
- Bin 1 - 1 digit long.
- Bins 1 to 4 - 1 digit long.

Thanks!

John

Design	Production	Interactive
Base modules		
Designer	1:1 Document Creator	
Browser Interfaces	Document Creation	PDrivers
Anywhere for Marketing	Advanced Tables	AFP
Additional Design Tools	Dynamic Charting	IJPDS
Design PDF	Publication Support	Metacode
Dialogue Compare	Dynamic File Import	PCL
DXF Design Converters	PDF Import as Image	PostScript
Quark	Advanced Workflow	PPML
OGI	Enterprise Workflow	VDX
	Compliance Support	VIPP
	Batch Compare	VPS
	Integrated Marketing Campaign Management	3211 Line Data
	Advanced Campaign Management & Tracking	EDrivers
	Connectors	HTML
	Dynamic Data Access	PDF
	IBM Content Manager	PowerPoint
	IBM WebSphere MQ	RTF
	JMS	TIFF
	SOAP	XML (composed)
	Watched Directory	XML (data)
	Advanced Data	High-Volume Production
	ODBC Data Access	High-Volume Delivery
	Print Miner	Output Sorting & Bundling
	XML Input	Application Consolidator

Exstream Software Documentation and Training Curriculum Catalog

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Introduction

The goal of the Exstream Software documentation set and training curriculum is to provide you with the information to enhance your workplace performance. We provide over forty guides that can be viewed on-screen or printed in their entirety. This information can also be accessed through the software as context-sensitive help.

Exstream Software offers nine instructor-led classes, available both on-site and at our headquarters in Lexington, Kentucky.

This document describes the Exstream documentation set and provides information on how to access it. The document also describes the training curriculum.

The Exstream Software Documentation Set

The Exstream Software documentation set is available in PDF format for on-screen viewing or print. You can access the books through context-sensitive help in the software or by accessing the Guides 500 folder. The default location for the folder is:

[drive]:\Program Files\Exstream\Guides 500

Dialogue

Available Dialogue Documentation

REFERENCE GUIDE	FILE NAME	CONTENT
Applications, Documents, and Pages	AppDocPg.pdf	Creating and defining Application Documents and Pages. Using applications, documents, and pages in Dialogue. Document development.
Approvals and Workflow	Approve.pdf	Versions, approval, and object history. Enterprise Approval module.
Messages and Campaigns	Campaign.pdf	Campaign Management module. Message and frame management. Creating and using text and graphic messages. Creating, managing, and using campaigns in an application.
Dynamic Charts	Charts.pdf	Dynamic Charting module. Creating, using, and defining charts. Chart types available in Dialogue.
Data Files	DataFile.pdf	Defining data files. Mapping data files. Using the COBOL copybook.
DBCS	DBCS.pdf	Using the DBCS version of Dialogue. Supporting Asian characters.
Design Environment	DesEnv.pdf	Functional overview of Designer. Logging into Dialogue. Using the Property, Edit, and Trash Panels. Using the Administration dialog box and setting options for Design Manager and Designer. Using the design area. Using the Outline Viewer.
Dynamic Data Access	DDA.pdf	Dynamic Data Access module. Defining and assigning connector objects. Building DLLs for use with Dialogue. Arguments required for a user-written routine. How routines can be used in Dialogue. Working with Java Enabler and .NET enabler.

Available Dialogue Documentation

REFERENCE GUIDE	FILE NAME	CONTENT
Dynamic File Import	Dynamic.pdf	Features associated with the Dynamic File Import module. Placeholder variables. Dynamic file import. Dynamic page import. Custom tag sets. DynaMessages.
Production Environment	Engine.pdf	Process of using the Dialogue Production Engine. Package files and the production environment Running the Dialogue Engine in the production environment on Windows NT, UNIX, and MVS. Using system-generated files, control files, Engine switches, and tracking administration.
Searching Dialogue	Find.pdf	Searching and replacing in Dialogue.
Formulas, Functions, and Rules	Formulas.pdf	Using rules, formulas, and functions in Dialogue. Using the Rule dialog box and Code panel. Functions available in Dialogue. Creating library functions.
Getting Started in Dialogue	GetStart.pdf	Installation procedures for the design and production environments. Installing the Reference Guides. Upgrading Dialogue. Available modules.
Glossary	Glossary.pdf	Definitions of commonly used terms in Dialogue and WebVerse. Acronyms and abbreviations in Dialogue Software.
High-Volume Delivery	HighVol.pdf	Using the features available with the High-Volume Delivery module, including barcodes, inserters, banner pages, color tables, output queues, reports, multiple-ups, and search keys.
Library Objects	Library.pdf	Using library objects. Rules on library objects. Check in/check out features. Load/unload features.
Logic Designer Interface	Logic.pdf	Using Logic Designer. Graphically create a formula, rule, Library function, or WebVerse process.
Print Miner	Miner.pdf	Using Print Miner in Dialogue. Explanation about carriage controls. Mapping a Print Miner data file with absolute positioning and with spots.

Available Dialogue Documentation

REFERENCE GUIDE	FILE NAME	CONTENT
Design Objects	Objects.pdf	Introduction to drawing objects. Editing objects. Using properties, variables, and language layers with objects.
ODBC Access	ODBC.pdf	Using the ODBC Access module. Detailed instructions on mapping a database by table query and by stored procedures. Running the Engine with ODBC Access.
Output and Delivery	Output.pdf	System settings for production. Paper types. Output bin contents. Using all the eDrivers and pDrivers available in Dialogue.
Packaging and the Design Engine	PackRun.pdf	Packaging in the Design Environment. Packaging campaigns and documents. Running the Design Engine and editing composed documents.
Publication Support	Pub.pdf	Features of the Publication Support module, including folio numbering, tables of content, indexes, footnotes, cross references, styles, and style sheets.
Dialogue Real-time	RealTime.pdf	Real-time module. Creating interactive documents in real-time with Dialogue.
Regulatory Support	Regulate.pdf	Compliance Support module. Using effectivity and jurisdictions.
Flow and Relativity	Relativity.pdf	Using relativity, flow, and frames. Benefits of flow and relativity. Flow page, relativity, and flow properties.
Sections and Paragraphs	SectPara.pdf	Benefits of sections and paragraphs. Creating sections and paragraphs. Formatting and designing sections and paragraphs in Designer. Using sections and paragraphs to create long documents.
Output Sorting and Bundling	Sorting.pdf	Output sorting, bundling, and post-sort report files. Application Consolidator module.
System Administration	System.pdf	Administrative functions of Dialogue. Setting up your system. Defining the administrative objects of Dialogue.

Available Dialogue Documentation

REFERENCE GUIDE	FILE NAME	CONTENT
Table Processing	Tables.pdf	Advanced Tables module. Descriptions of all table types. Instructions for creating and defining tables. Explanation of all table, row, column, and cell properties. Advanced tables features such as sectioned data, serpentine table flow, numbering rows in a table, and using the table analyst.
Create and Format Text	Text.pdf	Creating, sizing, and positioning text boxes. Text boxes and properties. Using the text box properties dialog box. Text operations and formatting. Using text wrap and serpentine text. Revising text and text rules. Converting shapes to text boxes.
Advanced Campaign Management and Tracking	Tracking.pdf	Advanced Campaign Management module. Advanced campaign properties. Dialogue Knowledgebase.
Troubleshooting Guide	Trouble.pdf	How-To links. Glossary. Support process. Links to the troubleshooting chapters available in the other guides.
Variables	Variable.pdf	Instructions on creating variables. Defining variable properties. Testing variables. Explanation for all System variables.
XML Input	XMLin.pdf	Using XML files as data sources. Explanation of automatic XML mapping, manual XML mapping, and XML files with section attributes.

Connectors and Converters

REFERENCE GUIDE	FILE NAME	INFORMATION CONTAINED
JMS Connector	JMS.pdf	Set up and use of Dialogue's JMS connector.
SOAP Connector	Soap.pdf	Install the SOAP Connector module. Use the module software as a Reference, Report, or Driver file.
Watched Directory Connector	WatchDir.pdf	Process of using the Watched Directory connector to run the Engine in real time by moving files into a particular directory or folder.
WebSphere MQ Connector	WebSphere.pdf	How Dialogue can communicate with IBM's WebSphere MQ Server.
Quark Converter	Quark.pdf	Using the Dialogue Quark converter. Installing the Quark Converter. Exporting designs from Quark.

WebVerse

REFERENCE GUIDE	FILE NAME	INFORMATION CONTAINED
WebVerse Administration	WVAdmin.pdf	Using WebConsole to administer a WebVerse site. Output management, including generating Preview Engine scripts and draining a batch delivery queue.
WebVerse Design	WVDesign.pdf	How to create and define forms, processes, and web applications. Data concept differences behind access, data files, and variables between Dialogue and WebVerse.
Getting Started in WebVerse	WVStart.pdf	Installing, fine-tuning, and upgrading WebVerse production systems on a variety of configurations (Windows and Unix platforms). Includes details on .NET installations and set up of the Development Kit.
WebVerse Tasks and Tips	WVTasks.pdf	Process of designing a simple WebVerse site Set up order Approval and Profile Processes. Troubleshooting and tips.
LDAP Interface	WVLDAP.pdf	How to set up the Lightweight Directory Access Protocol (LDAP) Authenticator and the LDAP Connector to incorporate LDAP servers with Dialogue WebVerse operations.

AFP

REFERENCE GUIDE	FILE NAME	INFORMATION CONTAINED
AFP Viewer	AFPView.pdf	Installing AFP Viewer. AFP architecture and overview. Using the AFP interface, properties, indexes shortcuts and document subsets.
AFP-PDF	AFPPDF.pdf	AFP-PDF installation and architecture. Using AFP-PDF features, functions, and commands. AFP-PDF messages.
AFP Jazz!	AFPJazz.pdf	AFP Jazz! installation, architecture, and introduction. The Bundle, Merge, Fusion, and Assemble modules. Using the Assemble utility. Creating an INI file and INI file commands. Variables, barcodes, and APF Jazz! messages.
AFP-TIFF	AFPTIFF.pdf	Transforming a document into a TIFF file.
AFP Index	AFPIndex.pdf	Introduction to AFP architecture and Index. AFP Index commands and key zones. Character strings and conditions. Creating groups and markers.
COMING IN Q3 OF 2005:		
CRTORSS	CRTORSS.pdf	AFP architecture and installation. Using CRTORSS syntax and commands. Using data and reference files. CRTORSS messages.
AFP-Strip	TBD	AFP-Strip installation and architecture. Using AFP-Strip features, functions, and commands.

Quick Reference

These small guides are designed for users who already know the product but just need reminders.

QUICK REFERENCE	FILE NAME	INFORMATION CONTAINED
AFP Index	IndexQR.pdf	AFP environment configuration, commands, key zones, and groups and markers.
AFP Jazz!	JazzQR.pdf	Using AFP Viewer and Index. Fusion, Merge, Bundle and Assemble modules. AFP Jazz! INI file commands.
AFP Transforms	TransQR.pdf	Listing of AFP Transform (AFP-PDF and AFP-TIFF) commands.
AFP Viewer	ViewQR.pdf	Using AFP Viewer shortcuts. Appended commands.
Dialogue Interface	InterfaceQR.pdf	Design Manager interface and shortcuts. Designer Interface and shortcuts.

Search Dialogue Documentation

Automatic Search

When you press the F1 key, Dialogue automatically opens an Adobe Acrobat window and opens to the first page in the documentation set that discusses the currently active dialog box or tab. You do not have to search for this topic (this find is automatic). From the Acrobat page you can browse, read, or print as you like. You can click on links in the far right column to go to other places in the documentation set that discuss specific topics in more detail, without having to conduct a search.

The top menu options under "Help" in a Dialogue program, such as Design Manager or Designer, also automatically open to pertinent pages in the documentation set.

Manual Search

When you do decide you want to search through the documentation for specific information, you can find all occurrences of a word or phrase by clicking on a shortcut of an index file on your desktop.

Use Acrobat 6 or 7

To conduct an index search, use Adobe Acrobat Professional or Adobe Acrobat Reader. It is strongly recommended that you use Adobe Acrobat 6 or 7. To access Adobe's Acrobat Reader portal to download the free Reader program, go to:

<http://www.adobe.com/products/acrobat>

Create a Shortcut

Using Windows, create a shortcut of the 'Guides.pdx' file located with the reference guides (default: **C:\Program Files\Exstream\Guides 500**) to your desktop or any other convenient location.

Example shortcut



Conduct a Search

This literal-text search is very quick and thorough.

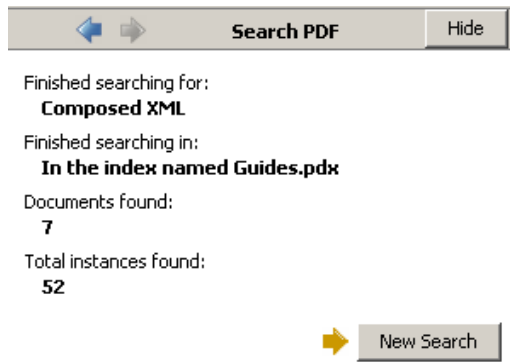
1. Click the 'Guides.pdx' shortcut you made.
An Adobe Acrobat window opens, ready for you to search using the index in a **Search PDF** pane.
2. In the **What word or phrase would you like to search for** text box, type a word or phrase.
3. Select or clear the **Whole words only** and **Case-sensitive** check boxes as needed for your search. The last two check boxes are not meaningful with reference guides.

:: Technical Note

Acrobat provides additional filters (to reduce the number of finds) if you click the **Use Advanced Search Options** link at the bottom of the pane.

4. Click **Search**.
The **Results** box displays the reference guides containing the text you specified.
5. To expand the results click the **+** button next to a reference guide name.
You view links to specific pages inside the book.

Search PDF dialog box (top portion)



Results:



6. Hover over the beginning of a line to see the book's page number in a pop-up window. Click anywhere on a link to open (in the Acrobat window) the page in the book containing the text.

Tip

If you move from one page (or book) to another you can use Acrobat's Back button to return to a previously viewed page (with Acrobat 7, you may have to click twice. One click may bring you to the cover of the current book.)

The Exstream Software Training Curriculum

The Exstream Software training curriculum consists of nine instructor-led courses, available both on-site and at our headquarters in Lexington, Kentucky. Course offering dates in Lexington are available on our website:

<http://www.exstream.com>

Introduction to Dialogue (101)

This three-day course is the starting point for all Dialogue training. This overview of Dialogue includes hands-on experience to get you started creating simple personalized customer communications. You will follow a recommended Application Lifestyle Process as you create business correspondence, policies, flyers, forms, invoices, and statements.

Audience

Individuals requiring a basic understanding of Dialogue and how to use this software solution to meet their enterprise personalization needs.

Prerequisites

Working knowledge of Microsoft Windows operations, such as mouse navigation. Experience using other publishing applications such as Microsoft Word or PowerPoint is helpful.

Goals

The **101 :: Introduction to Dialogue** course teaches how to work with Dialogue **Design Manager** and Dialogue **Designer** to create personalized communications. You will become familiar with Dialogue's interface, features, and options, as well as learn applicable skills to use in design and production environments.

Upon completion of this course, you should be able to:

- Identify how the Dialogue operating environment, basic architecture, and software suites can be used as a single solution for multi-channel presentation.
- Use Dialogue with an existing system environment and data files, following a suggested application development cycle, to design and produce:
 - Business correspondence
 - Policies
 - Flyers and forms
 - Invoice statements
- Troubleshoot common Dialogue data, design, and production issues.
- Access and use on-screen Dialogue documentation and the Online Support Center.

Dialogue System Administration (110)

This two-day course is the starting point for those responsible for performing Dialogue administration activities. It provides an introduction and hands-on experience with the installation and initial setup of Dialogue, setting up the system environment, the basic design environment objects for standardization, and enabling Dialogue to produce output both electronically and in hardcopy.

Audience

Individuals responsible for setting up and maintaining Dialogue.

Prerequisites

Introduction to Dialogue (101)

Goals

To manage and maintain the Dialogue object-oriented environment you should be able to:

- Install and upgrade Dialogue.
- Set up and maintain the System Environment.
- Set up and maintain the Design Environment.
- Set up and maintain the Delivery Environment.

Advanced Data Concepts (210)

This three-day course provides details and hands-on experience creating data structures using different types of data files, complex rules and formulas, variables, and inputs from XML files.

Audience

Individuals responsible for creating and maintaining the data structures needed for Dialogue applications.

Prerequisites

Introduction to Dialogue (101), Dialogue System Administration (110), experience working with data structures.

Goals

To create effective Dialogue data structures you should be able to:

- Add variables and data file descriptions to the design database using Design Manager.
- Create data maps that link variables with data files.
- Create data structures that:
 - Expedite variable and data map creation by using COBOL Copybooks.
 - Add business rules and formulas to the design database.
 - Extract variable information from an existing print file using the Print Miner module.
 - Access relational databases using the ODBC Access module.
 - Include external images and text files by using the Dynamic File Import module.
 - Incorporate data into Dialogue using the XML Input module.
 - Connect to any corporate database by using the Dynamic Data Access module.

High-Volume Delivery (211)

This two-day course provides an overview of the High-Volume Production suite and hands-on experience creating efficiency in the print and mailing environment. It covers output queues; sorting and bundling; and the use of multiple up, inserts, and barcodes.

Audience

Individuals responsible for managing their print center and mailing facility.

Prerequisites

Introduction to Dialogue (101), Dialogue System Administration (110), familiarity with print and mailing concepts.

Goals

To maximize the efficiency of your print center and mailing facility you should be able to use Dialogue to:

- Simultaneously process large quantities of customer communications for many different delivery mediums (print and electronic).
- Streamline distribution by routing communications to appropriate queues based on rules.
- Improve processing performance by sorting and bundling communications.
- Save on manpower and costs by consolidating different Dialogue applications and runs.

Creating Marketing Documents (301)

This two-day course provides a thorough overview of campaigns, campaign properties, and message management and hands-on experience developing applications with integrated marketing campaigns. Also covers targeting, prioritization, tracking, campaign analysis, and white space management.

Audience

Individuals who are using Dialogue's Campaign Management to create targeted marketing materials and Advanced Campaign Management and Tracking to track the distribution and success of each campaign.

Prerequisites

Introduction to Dialogue (101), Dialogue System Administration (110), experience executing marketing strategies.

Goals

To create marketing documents and campaigns you should be able to:

- Develop targeted marketing messages and campaigns.
- Control the delivery of information by prioritizing messages and campaigns.
- Select information to be delivered based on customer criteria and postal weight limitations.
- Measure the success of a marketing campaign by tracking message delivery and customer response using the Tracking Knowledgebase.
- Ensure the efficient use of document real estate by managing white space.

Creating Long Documents (302)

This two-and-a-half day course provides an overview and hands-on experience creating long documents such as policies, prospectuses, and other documents common to the property, health, and automobile insurance industries. Covers document design and production requirements, Dialogue design elements, navigation tips, property boxes, and best practices.

Audience

Individuals who are responsible for creating long documents.

Prerequisites

Introduction to Dialogue(101), Dialogue System Administration (110), experience working with publishing tools used to create long documents.

Goals

To use Dialogue effectively to create long documents with static or dynamic information, you should be able to:

- Identify document design and production requirements.
- Create long documents with:
 - Constant and changing messages
 - Sections and paragraphs.
 - Customized messages.
 - Consistent design styles.
 - Reference elements such as:
 - Multi-level tables of contents that automatically renumber sections, paragraphs, and lists.
 - Dynamically created indexes with up to three hierarchical levels
 - Footnotes in tables and text.
 - Editing tools.
 - Files created once and shared with other applications.
 - Pages created once and shared with other applications.
 - Targeted messages.
 - Approval processes, versioning, effectivity and jurisdictions for historical or future date use.
- Assemble a dynamic document by specifying its content and the order it will be created by using variables.
- Troubleshoot common problems that may occur.

Creating Complex Statements (303)

This four-day course provides in-depth instruction and hands-on experience using Dialogue's Advanced Tables and Dynamic Charting modules to create applications such as telephone bills, bank statements, and 401(k) statements containing multiple pages of transaction-driven tables. Covers design considerations, rules, section-based processing, dynamic charts, white space frames, last flow pages, and event timing.

Audience

Individuals who are responsible for creating complex multiple-page, transaction-driven statements.

Prerequisites

Introduction to Dialogue (101), Dialogue System Administration (110), experience working with data structures and documents containing multiple pages of tables.

Goals

To create and deliver complex statements using transaction-driven tables that dynamically flow from one page to another, you should be able to:

- Identify the benefits of using table, row, column, or cell properties for various applications.
- Personalize the contents of a table using inclusion, selection, and multiple-selection rules.
- Group data into logical sections on a table by using non-section and section data.
- Produce specific documents for each customer based on criteria and the method of inclusion.
- Produce variable charts and graphs based on certain conditions and requirements.
- Create white space frames and set properties to determine the objects that will fill the frames.
- Change the format of the last page of a document using a last flow page.
- Control when an object or document is included in final output by using variable and late compose event timing.

Introduction to WebVerse Design (401)

This two-and-a-half day course provides an overview and hands-on experience using WebVerse to create an Internet application for fulfilling on-demand requests for personalized documents. Covers pre-design considerations, application design, and site deployment.

Audience

Individuals who are responsible for using WebVerse to design an Internet application for eFulfillment.

Prerequisites

Introduction to Dialogue (101), Dialogue System Administration (110), and experience working with Dialogue.

Goals

To start building and deploying Web applications, you should be able to:

- Identify the benefits of key WebVerse features and functions.
- Explain how WebVerse obtains and uses data.
- Grant user access by defining user privileges and access rights.
- Plan the flow of a Web application by identifying organizational needs and the information to be collected.
- Create a web application by using a:
 - Normal form.
 - Order process.
 - Login form
 - Menu form.
 - Delivery queue.
 - Profile to collect website user data.
- Move orders through an approval process.

WebVerse System Administration (402)

This half day course provides details on the administration of a WebVerse site and provides a hands-on experience using the WebConsole to manage and maintain users and output.

Audience

Individuals who are responsible for the management of a WebVerse site.

Prerequisites

Introduction to Dialogue (101), Dialogue System Administration (110), Introduction to WebVerse Design (401) .

Goals

To manage and maintain a WebVerse site you should be able to:

- Identify the WebVerse environment, its components, and system requirements.
- Use the WebConsole to:
 - Load WebVerse package files into the Web database.
 - Create users.
 - Build preview engine scripts.
 - Load Web files and automate this process.

Interface and Shortcuts

Quick Reference Guide

Version 5.0

About this Guide

Design Manager and Designer are used to create your personalized communications.

Design Manager is a design management software that enables you to create and manage objects, manage users and security, and define the delivery environment.

Designer is a graphic design software that enables you to design objects, such as pages and messages. It gives you the capability to design on-the-fly multifaceted messages and pages composed of formatted text and/or virtually unlimited graphic elements.

This guide is designed as a quick reference to the Dialogue interface and its keyboard shortcuts. For more information refer to the Dialogue documentation set described in the ***Exstream Software Document and Training Curriculum Catalog***. It is available as part of the Reference Guide set and for download from the Exstream FTP site.

Dialogue's interface can be customized. This guide assumes a full system configuration. You may see some options that are not available on your system.

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Design Manager Interface

Design Manager is used to:

- Create and manage the objects in the design database that are used to build communications.
- Manage users and security.
- Define the delivery environment.

This section provides an overview of the Design Manager interface, including:

- General Interface
- Menus and Submenus
- Toolbars
- Palettes

CONTENT ::

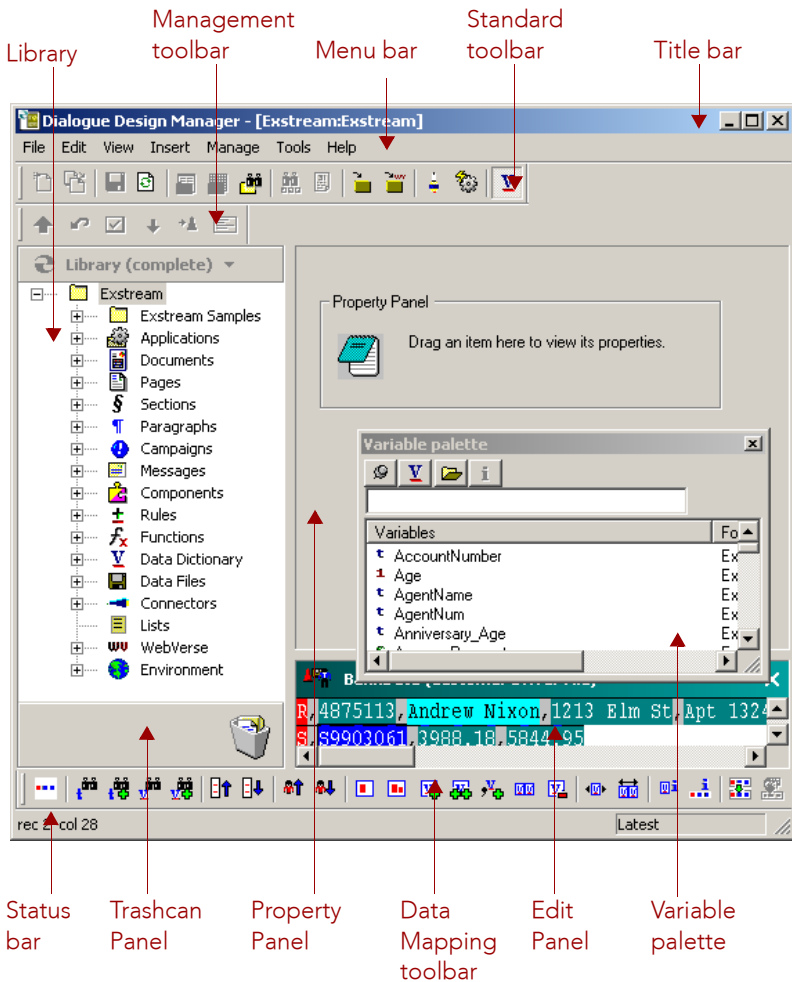
General Interface

Menus and
Submenus

Toolbars

Palettes

General Interface



Menus and Submenus

File Menu

Change Database...
List Active Users
Login as Different User...
User Access Report
Load an Item...
Unload an Item...
Export List...
Print List...
Exit

Edit Menu

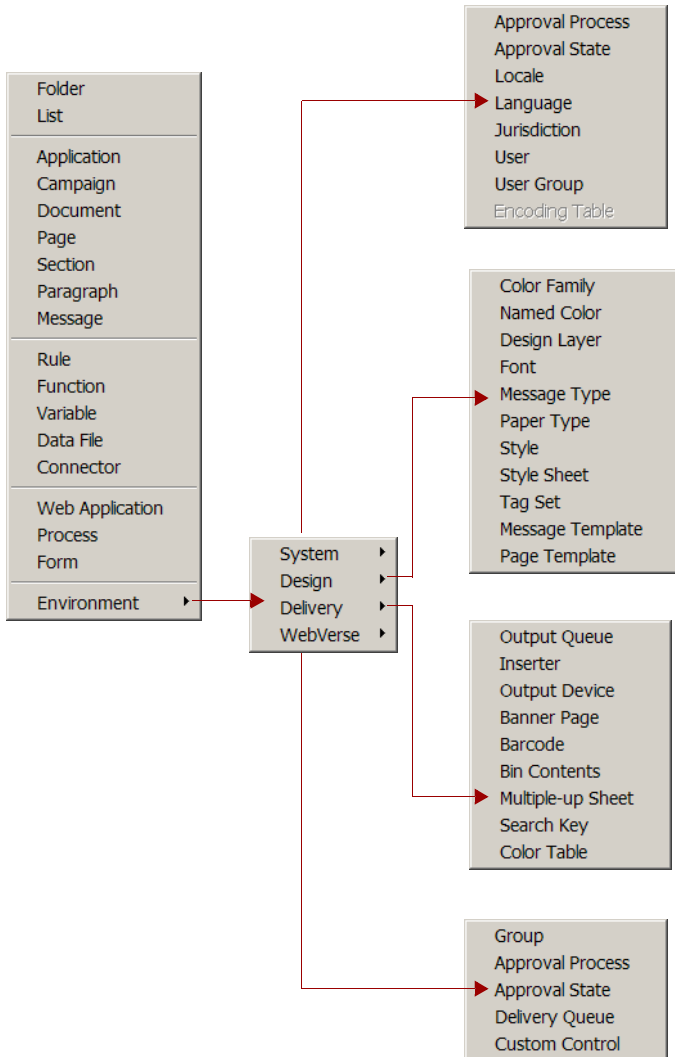
Cut	Ctrl+X
Copy	Ctrl+C
Paste	Ctrl+V
Properties	Ctrl+P
Contents	Ctrl+E
Rename	Ctrl+R
Remove reference	Del
Clone	
Save	
Close	
Refresh	F5

View Menu

Folder...	
List	
Filtered Search..	Ctrl+L
Toolbars	▶
Variable Palette	
✓ Trashcan	
✓ Status Bar	
✓ Lists as Icons	

- ✓ Standard
- ✓ Management
- ✓ Data Mapping

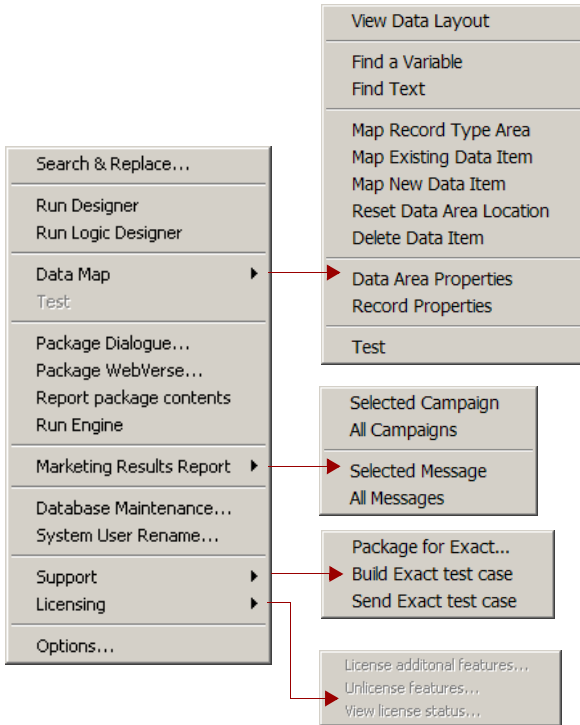
Insert Menu



Manage Menu

Submit for Approval	
Cancel Submission	
Reject	
Approve	
Approve All	
Unapprove	
Make Work-In-Progress	
<hr/>	
Check Out	
Check Out All	
Check In	
Check In All	
Lock	
Lock All	
Unlock	
Unlock All	
<hr/>	
History	Alt+H
Jurisdictional Effectivity Report	Alt+J
Where-Used Report	
Administer	

Tools Menu



Help Menu



Context-Sensitive Help -

Information about the specific area in which you are working.

How-To Guide - Links to instructions for completing basic tasks.

Documentation Catalog - A guide to the Dialogue documentation set and training offerings.

Dialogue Glossary - Definitions to common terms in Dialogue.

Message Dictionary - Error message information.

Dialogue on the Web - Opens the Exstream website.

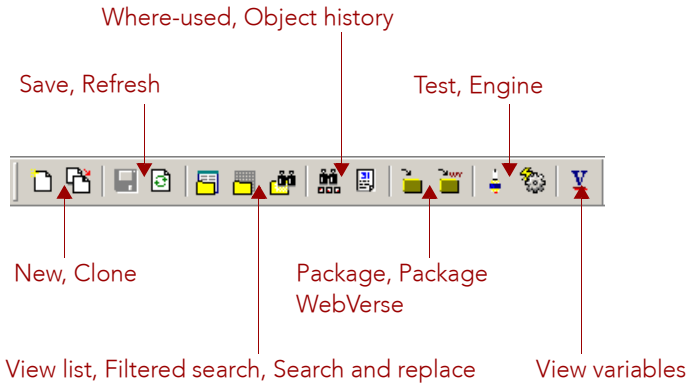
Exstream Exchange - Opens Exchange where you can search for helpful articles.

About Design Manager - Dialogue version information.

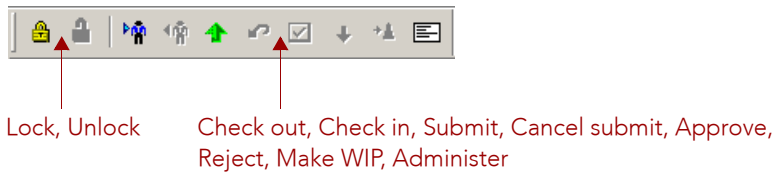
Toolbars

Toolbars can be docked along the outer edge of the interface or float. To move a toolbar, click and drag it to the desired location.

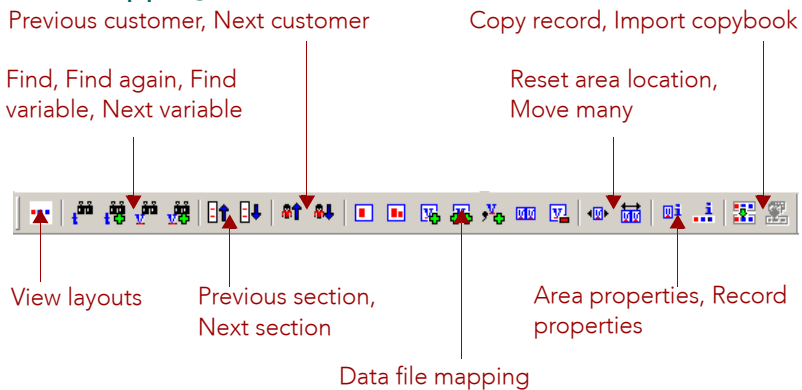
Standard Toolbar



Management Toolbar

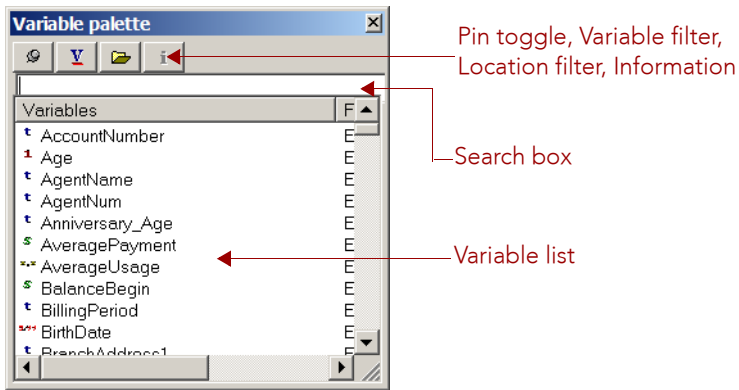


Data Mapping Toolbar



Palettes

Variable Palette



Notes

Design Manager Shortcuts

You can use Design Manager menus and submenus or the shortcut keys to perform management activities. This section lists the shortcuts available in Design Manager.

:: Technical Note

Shortcut keys are also listed on the Design Manager menus and submenus.

CONTENT ::

Shortcuts

- Data Mapping Shortcuts
- Editing and Selection Shortcuts
- Help Shortcuts
- Rule Shortcuts
- Search Shortcuts
- Workflow Shortcuts

Shortcuts

Data Mapping Shortcuts

ACTION	SHORTCUT
Add Channel Based Spot	ALT+C
Add Text Based Spot	ALT+S
Next Customer	CTRL+PAGE DOWN
Next Page	PAGE DOWN
Next Section	ALT+PAGE DOWN
Next Customer	CTRL+PAGE DOWN
Next Page	PAGE DOWN
Next Section	ALT+PAGE DOWN
Previous Customer	CTRL+PAGE UP
Previous Page	PAGE UP
Previous Section	ALT+PAGE UP
View Hex Characters	CTRL+H

Editing and Selection Shortcuts

ACTION	SHORTCUT
Cut	CTRL + X
Delete	CTRL+D
Edit	CTRL+E
Filter Search	CTRL+L
History	ALT+H
Insert	CTRL+N
Jurisdiction	ALT+J
Paste	SHIFT+ INSERT
Properties	CTRL+P
Refresh Library	F5
Remove Reference	DELETE
Rename	CTRL+R
Save	CTRL+S
Test	CTRL+T

Help Shortcuts

ACTION	SHORTCUT
Help	F1

Rule Shortcuts

ACTION	SHORTCUT
Insert Condition	ALT+S
Insert Function	ALT+F
Insert Variable	ALT+V

Search Shortcuts

ACTION	SHORTCUT
Find Again	F3
Find Text	CTRL+F

Workflow Shortcuts

ACTION	SHORTCUT
Check Out	CTRL+DRAG

Designer Interface

Designer is a graphic design software that enables you to design objects, such as pages and messages.

Designer gives you the capability to design on-the-fly multifaceted messages and pages composed of formatted text and/or virtually unlimited graphic elements.

This section provides an overview of the Designer interface, including:

- General Interface
- Menus and Submenus
- Toolbars
- Palettes

CONTENT ::

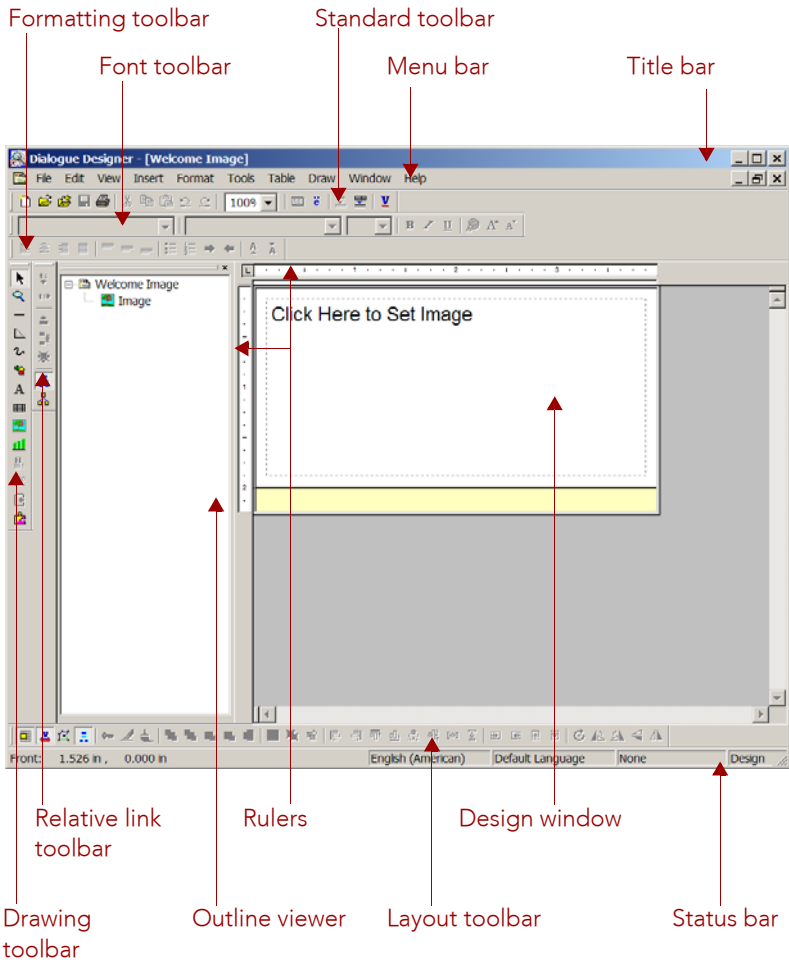
General Interface

Menus and
Submenus

Toolbars

Palettes

General Interface



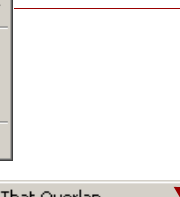
Menus and Submenus

File Menu

New...	Ctrl+N
Open...	Ctrl+O
Close	
Save	Ctrl+S
Save As...	
Open Compose File...	
Compare Compose Files...	
Import DXF...	
Print...	Ctrl+P
Print Setup...	
Print Preview	
1. Welcome Image	
2. Anniversay Image	
3. Christmas Trees	
4. Test Section	
Exit	

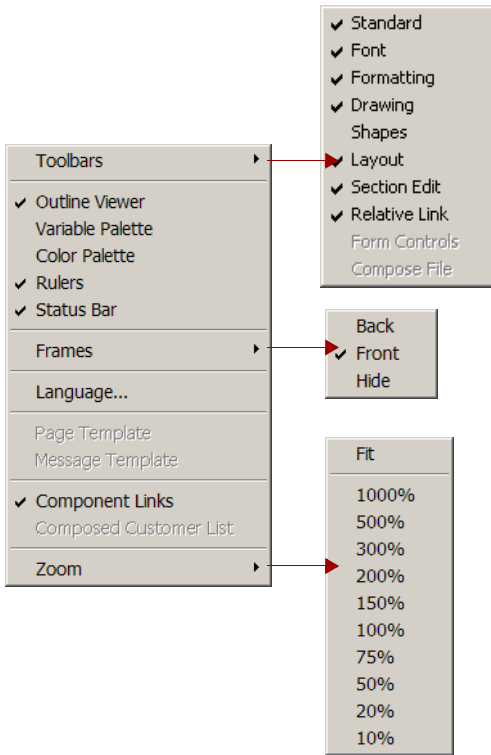
Edit Menu

Undo Text Box Edit	Ctrl+Z
Redo Text Type WhiteSpace	Ctrl+Y
Cut	Ctrl+X
Copy	Ctrl+C
Paste	Ctrl+V
Delete	Del
Select All	Ctrl+A
Select Layer...	
Select Objects	
Find...	Ctrl+F
Find Next	F3
Replace...	Ctrl+H
Object	

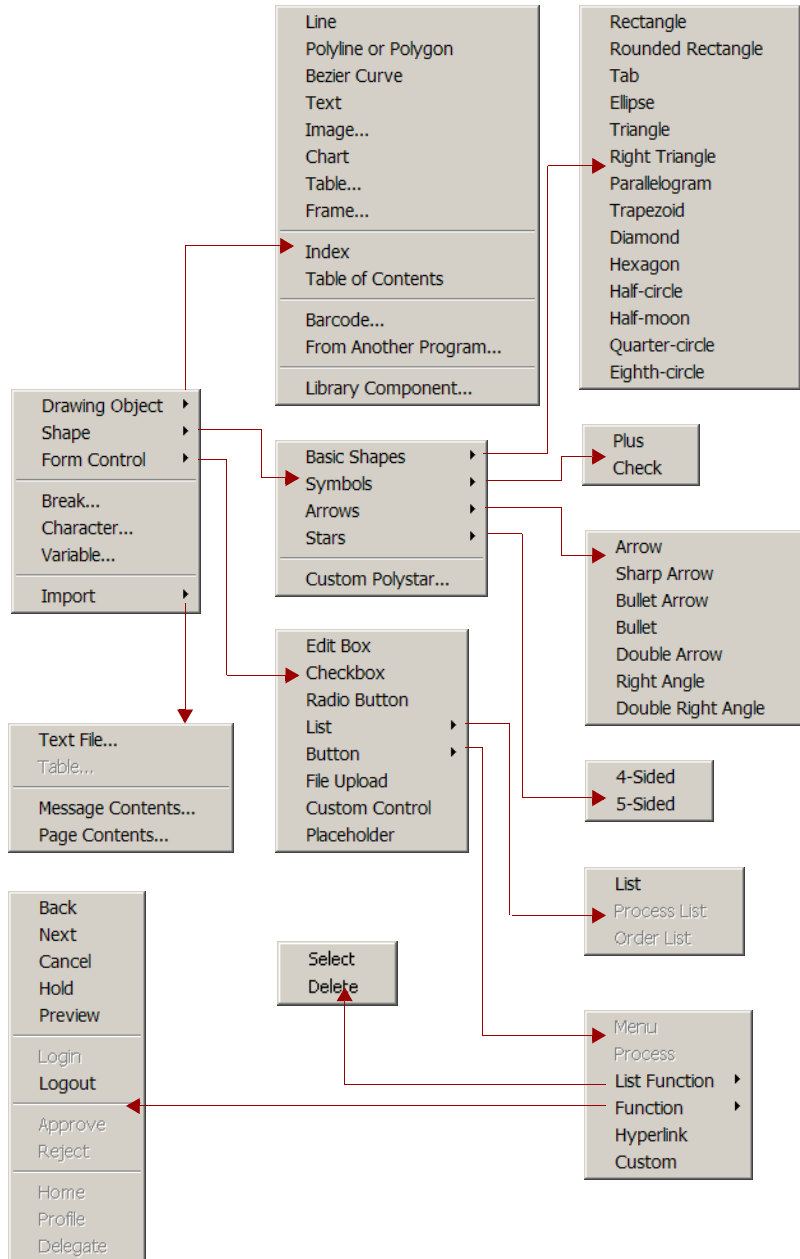


That Overlap	
That are Relative Positioned	Alt+1
That have Rules	Alt+2
That are Autosized Vertically	Alt+3
That Affect the Position of Selected Object	Alt+4
That are Relative to Selected Object	Alt+5

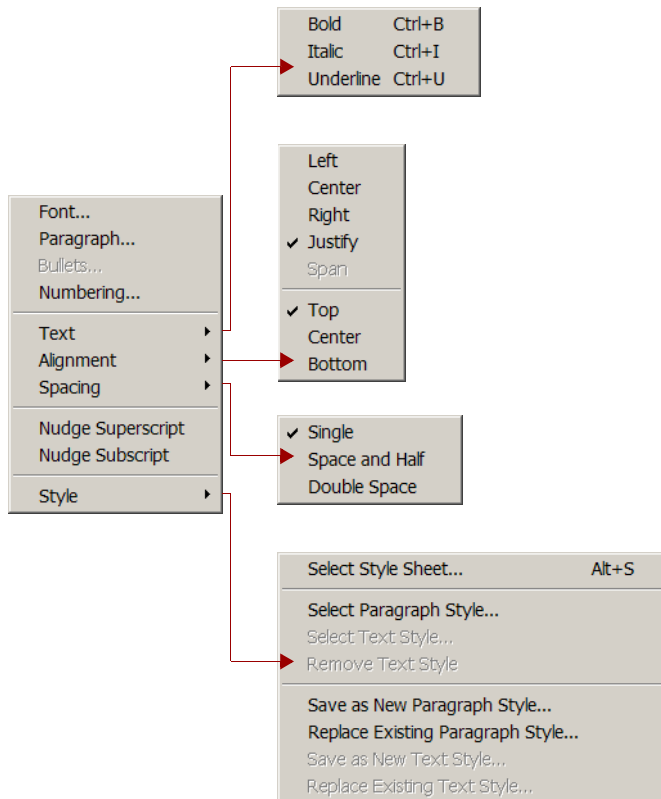
View Menu



Insert Menu



Format Menu



Tools Menu

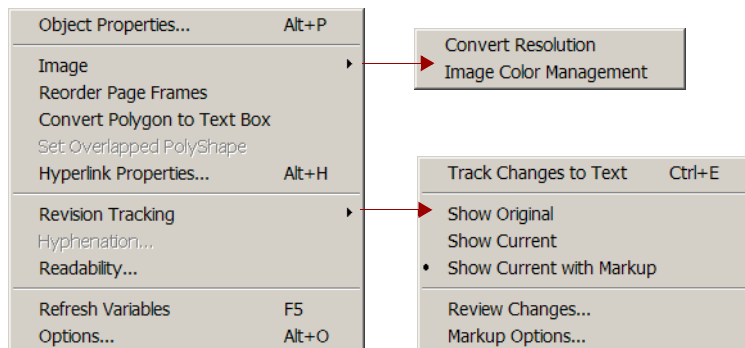
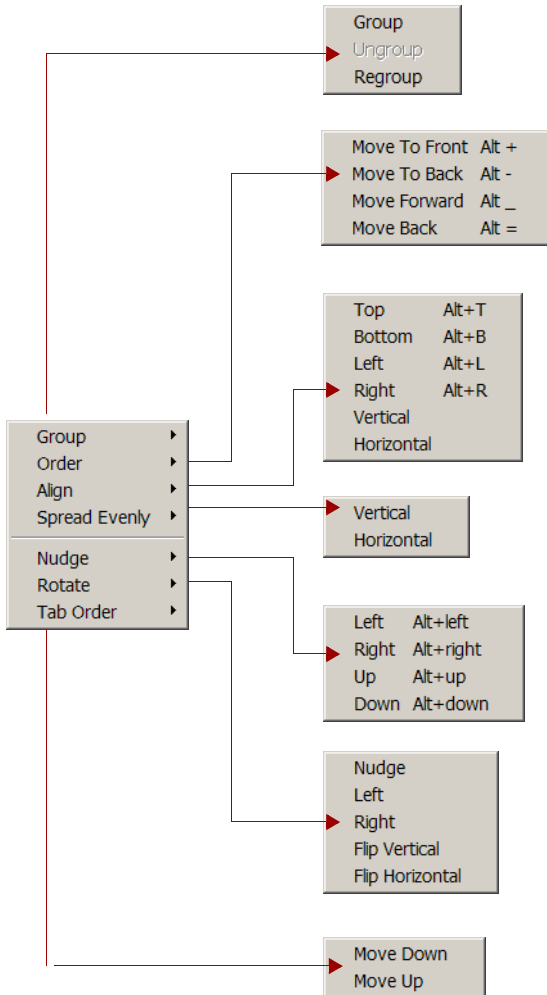


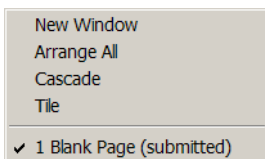
Table Menu

Insert Table...	
Delete	
Duplicate	
Insert	
Equal Size	
Table Properties...	
Row Properties...	Ctrl+R
Column Properties...	Ctrl+L
Cell Properties...	Alt+C
Join Cells	
<i>Split Cells</i>	
Group Rows	
Explain Table Symbols...	

Draw Menu



Window Menu



Help Menu

**Context-Sensitive Help -**

Information about the specific area in which you are working.

How-To Guide - Links to instructions for completing basic tasks.

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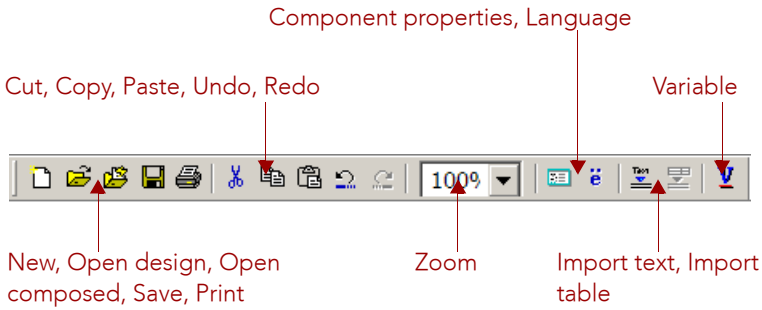
Exstream Exchange - Opens Exchange where you can search for helpful articles.

About Designer - Dialogue version information.

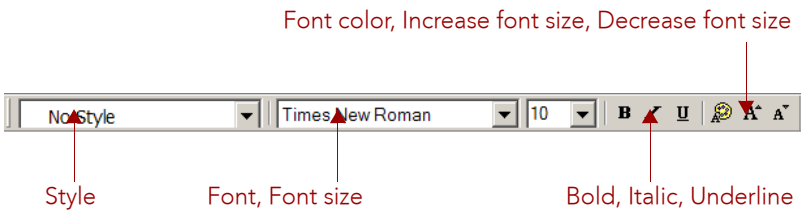
Toolbars

Toolbars can be docked along the outer edge of the interface or float. To move a toolbar, click and drag it to the desired location.

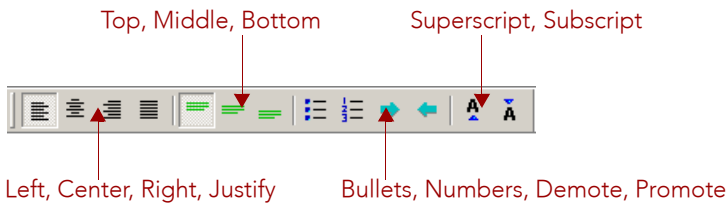
Standard Toolbar



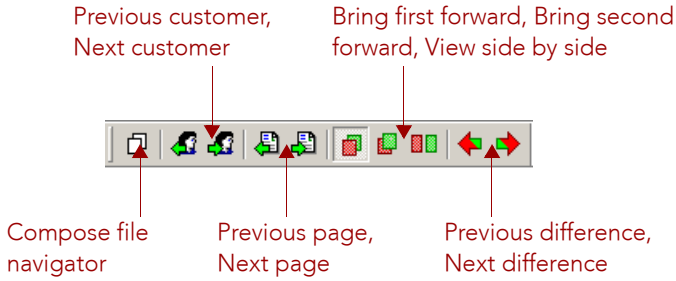
Font Toolbar



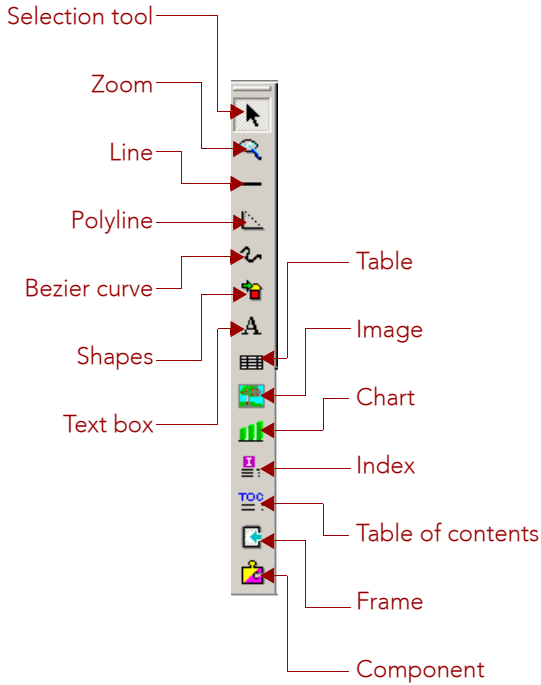
Formatting Toolbar



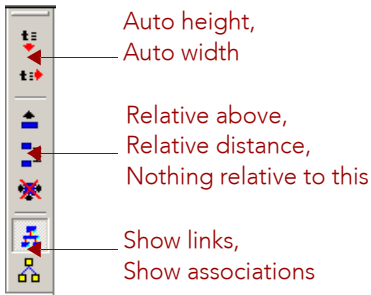
Compose File Toolbar



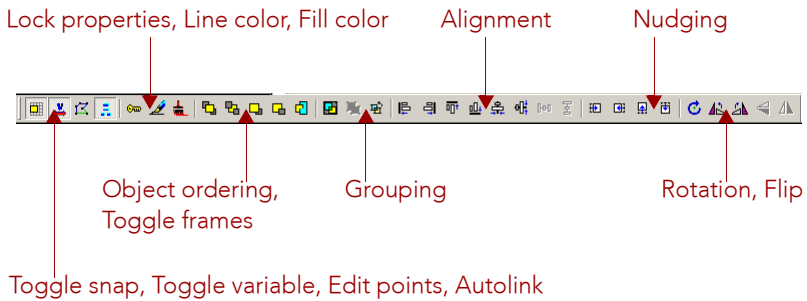
Drawing Toolbar



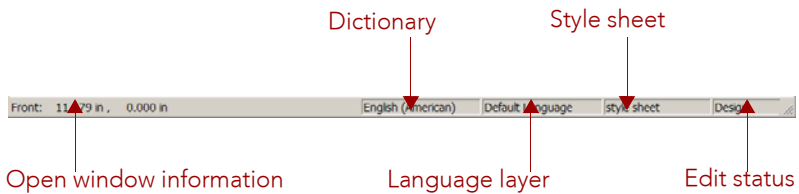
Relative Link Toolbar



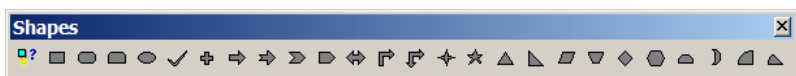
Layout Toolbar



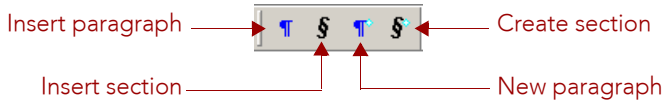
Status Bar



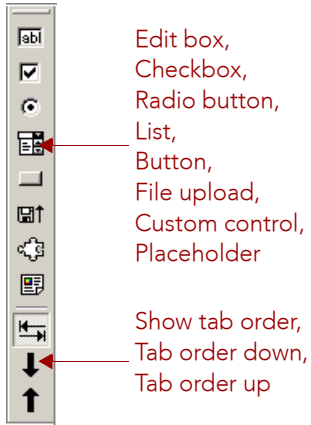
Shapes Toolbar



Section Edit Toolbar

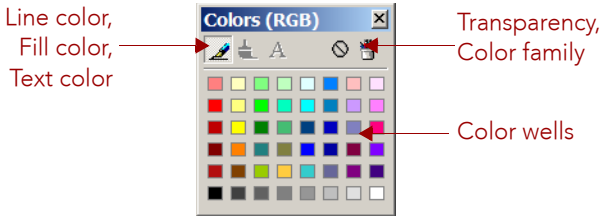


Forms Toolbar

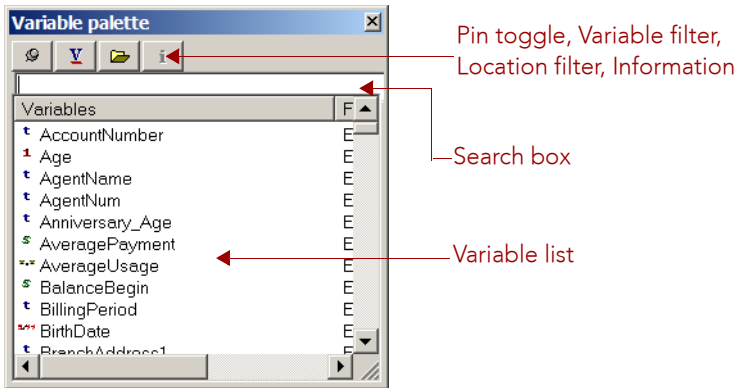


Palettes

Color Palette



Variable Palette



Designer Shortcuts

You can use the Designer menus and submenus or the shortcut keys to perform design activities. This section lists the shortcuts available in Designer.

:: Technical Note

Shortcut keys are also listed on the Designer menus and submenus.

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Shortcuts

- Alignment Shortcuts
- Autosize Shortcuts
- Break Shortcuts
- Editing and Selection Shortcuts
- File Shortcuts
- Formula Shortcuts
- Help Shortcuts
- Movement Shortcuts
- Nudge Shortcuts
- Order Shortcuts
- Properties Shortcuts
- Table Cell Movement Shortcuts
- Text Formatting Shortcuts
- View Shortcuts

Shortcuts

Alignment Shortcuts

ACTION	SHORTCUT
Align Bottom	ALT + B
Align Left	ALT + L
Align Right	ALT + R
Align Top	ALT + T

Autosize Shortcuts

ACTION	SHORTCUT
Toggle the Autosize Height (y)	ALT + Y
Toggle the Autosize Width (x)	ALT + X

Break Shortcuts

ACTION	SHORTCUT
Column Break	SHIFT + ENTER
Line Break (Soft Return)	CTRL + ENTER
No-Break Space (Sticky Space)	CRTL + SPACE

Editing and Selection Shortcuts

ACTION	SHORTCUT
Copy	CTRL + C
Cut	SHIFT + DELETE CTRL + X
Delete	DELETE CTRL + DELETE
Find	CTRL + F
Find Next	F3
Paste	SHIFT + INSERT CTRL + V
Redo	CTRL + Y
Replace	CTRL + H
Select All	CTRL + A
Undo	CTRL + Z ALT + BACKSPACE

File Shortcuts

ACTION	SHORTCUT
New Object	CTRL + N
Open Object	CTRL + O
Print Current Object	CTRL + P
Save	CTRL + S

Formula Shortcuts

ACTION	SHORTCUT
Insert Condition	ALT + S
Insert Function	ALT + F
Insert Variables	ALT + V

Help Shortcuts

ACTION	SHORTCUT
Help	F1

Movement Shortcuts

ACTION	SHORTCUT
Next design window	CTRL + F6

Nudge Shortcuts

ACTION	SHORTCUT
Nudge Down	ALT + DOWN ARROW DOWN ARROW
Nudge Left	ALT + LEFT ARROW LEFT ARROW
Nudge Right	ALT + RIGHT ARROW
Nudge Up	ALT + UP ARROW UP ARROW
Nudge ½ normal nudge increment Down	SHIFT + Nudge Down
Nudge ½ normal nudge increment Left	SHIFT + Nudge Left
Nudge ½ normal nudge increment Right	SHIFT + Nudge Right
Nudge ½ normal nudge increment Up	SHIFT + Nudge Up
Nudge twice normal nudge increment Down	CTRL + Nudge Down
Nudge twice normal nudge increment Left	CTRL + Nudge Left
Nudge twice normal nudge increment Right	CTRL + Nudge Right
Nudge twice normal nudge increment Up	CTRL + Nudge Up

Order Shortcuts

ACTION	SHORTCUT
Bring to Front	ALT + + CTRL + +
Bring to Front	
Move Back One	ALT + - NumPad -
Move Forward One	ALT + = NumPad +
Send to Back	CTRL + -

Properties Shortcuts

ACTION	SHORTCUT
Active Object Properties	ALT + P ALT + RETURN
Cell Properties	ALT + C
Column Properties	CRTL+ L
Designer Options	ALT + O
Hyperlink Properties	ALT + H
Row Properties	CTRL + R

Table Cell Movement Shortcuts

ACTION	SHORTCUT
Move to the next cell	CTRL + TAB
Move to the previous cell	CTRL + SHIFT + TAB

Text Formatting Shortcuts

ACTION	SHORTCUT
Apply Style	ALT + S
Bold	CTRL + B
Italic	CTRL + I
Soft Hyphen (Hyphenate here if needed.)	CTRL + -
Underline	CTRL + U

View Shortcuts

ACTION	SHORTCUT
Refresh Variables	F5
Toggle pop-up tips on and off	CTRL + T
Toggle Windows	ALT + ESC
View Conditional Colors	ALT + 2
View Dynamically Positioned Objects	ALT + 1
View Dynamically Sized Objects	ALT + 3
View Selected Dependencies	ALT + 5
View Selected Links	ALT + 4
Zoom to Width	CTRL + 0
Zoom 100%	CTRL + 1

July 2006

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