

Transaction Document School

by acadami™



Schools offered in the United States, Canada, and UK

Transaction Document School

"The course material, and the way it was presented, is excellent. It would be impossible to teach my team this amount of relevant information internally. In short, this is a must for all my staff."

VP Document Services, Citigroup Global Transactions

Personalized transaction documents, high-speed colour printing, end-to-end workflow management and postal tracking will dramatically change our development and production processes. The speed and cost of implementation will depend on trained personnel.

To help you prepare [acadami](#) offers their five-day **Transaction Document School** , This comprehensive program contains three courses that focus on:

- The document production *workflow* and its job steps
- The business, development, and operations *lifecycle* phases of a document application, system, or technology
- Bad, acceptable, and best practices in the workflow and lifecycle

Qualify for your EDA

The school is designed to provide core training in Transaction Documents and provide enough *Education Credits* to qualify for the Electronic Document Associate level of the EDP Program. Over 40 students have graduated from the school and qualified for their EDA.

HR Professional Development compliance

Our school also addresses the need for profession training that meets your corporate HR and Education guidelines. By complying with the following guidelines, this School could be funded through your organization's professional training budget:

- student is examined on the knowledge they have gained
- training leads to an industry-recognized certification

In addition, our Learning Management System is SCORM 1.2 and conforms to the levels of intellectual behaviour important to learning as defined by Bloom's taxonomy: remembering and understanding, applying and analyzing, evaluating and creating.

Who should register?

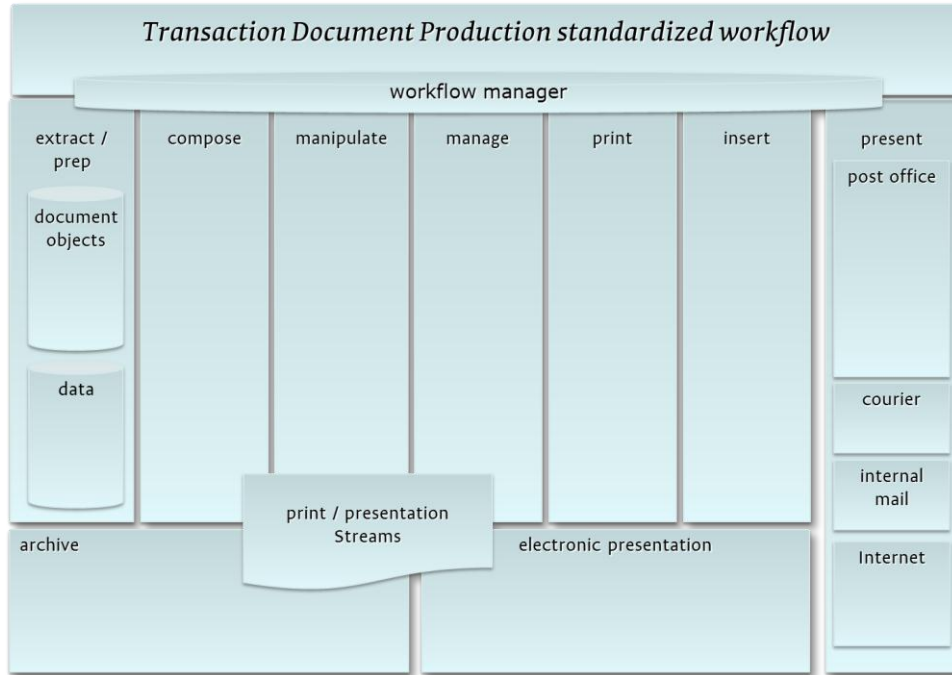
We developed the school for sales, operations, technical, and client support specialists that will be assisting customers or colleagues in the business planning, development and/or operation of transaction documents systems; They would include:

- Customer support and account management specialists – both first and second level
- Operations management
- Document application developers and architects
- Sales and product management/marketing
- Professional services customer engagement staff
- Managers involved in RFPs and hardware/software acquisition

Examinations

In order to successfully complete each course, you are required to attain at least 85% on each of the three course exams. You must pass all three exams to complete the school.

Courses within the School



Two day class

Course Summary

To help you better understand the infrastructure, vocabulary, and historical reasons driving the typical transaction document workflow, *acadami* offers the two-day Transaction Document Production certificate course. This comprehensive course provides detail on each of the job-steps in transaction document production and distribution from *data to delivery*.

as a Manager I learned that training should always continue.

I WILL RECOMMEND THIS COURSE TO MANAGEMENT FOR COLLEAGUES.

Student comments

Module abstracts

What Makes a Great Transaction Document

What are transaction documents? Why are they produced?

What makes them of value to both the recipient and the issuer?

Why should you want to improve the informational value of the document and optimize the production process?

Typography

Typography plays a major role in making information readable and conveying the professionalism of the sender.

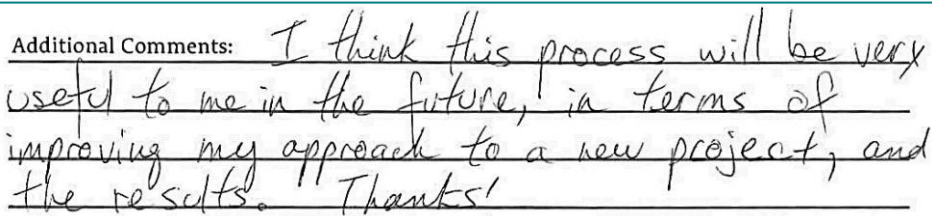
You will learn:

- different type styles and faces
- numeral styles available
- fundamentals of typography, including:
 - structure
 - terminology
 - how typefaces actually work

Design

Find out why the many fundamental concepts in document layout that, when used, create a more civilized document.

You will be more familiar with most of the variables that affect document readability and will have a better grasp for the art of information design.

A rectangular box with a thin teal border containing handwritten text in black ink. The text is written on a set of horizontal lines. The text reads: "Additional Comments: I think this process will be very useful to me in the future, in terms of improving my approach to a new project, and the results. Thanks!"

Additional Comments: I think this process will be very useful to me in the future, in terms of improving my approach to a new project, and the results. Thanks!

Understanding Colour

We are moving quickly to transaction documents in colour on blank stock.

You will become more familiar with:

- different colour management systems used
- differences between CMYK and RGB
- how to (and not to) use color in transaction documents
- cultural and accessibility issues

Module abstracts

Data

The first step to producing a transaction document is to get the right data and properly prepare it for composition.

You will learn:

- fundamental classifications of data
- different data structures
- data extraction and normalization

You will be more familiar with the terminology associated with extracted data and have a deep appreciation for how this process works.

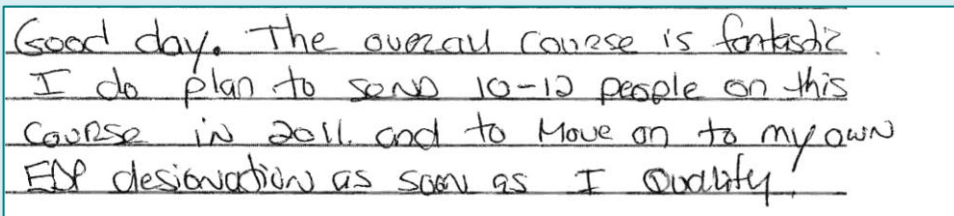
Document Objects

Production documents contain numerous document objects and structures, including:

- text
- fonts
- images
- graphics

You will become more familiar with:

- types of document objects
- how to develop, review and promote into production
- why they are significantly different from data



Composition

Composition systems play an extremely important role in producing a transactional document.

You will learn how these systems:

- convert data and document objects into documents ready for the recipient
- use conditional processing to tailor content for the recipient
- emit different presentation streams destined for various delivery channel
- interface with inserting and postal preparation systems

Print Streams

A print (presentation) stream describes the document, and carries its contents to whatever media on which it will be presented (paper or display).

You will be more familiar with their origins and will be aware of the major print streams.

Module abstracts

Print Stream Manipulation and Transform

Print stream tools allow you to apply changes to the print file prior to production that can't be easily done within the composition system.

You will be more familiar with how to:

- intermingle multiple applications (household)
- properly sort mail-pieces
- apply barcodes for tracking, audit, and other purposes

You will also learn the fundamentals of transforming a print stream into another one or into a tag-based format such as XML.

Archiving

All corporate records management policies require that copies of external correspondence be kept.

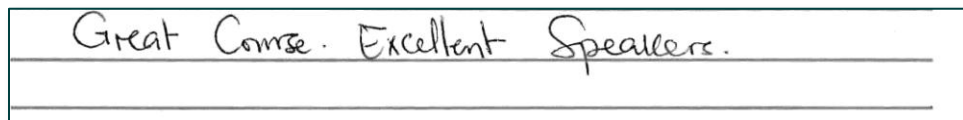
You will learn:

- business reasons to archive
- how to place transaction documents into an archive
- type of metadata that should be provided with the document

Electronic Presentation

Transaction mail production should also manage the creation of electronically delivered statements.

You will learn the general principles of electronic transaction mail creation, management and delivery, as well as options available, and when to use them.



Print (and Printer) Management

Print management systems:

- optimize the print production process and workflow
- provide information and breakdowns of production statistics and costs
- ensure that all documents were printed and secured

You will learn about:

- print stream and document object processing
- print queue and printer management
- error recovery and reconciliation

Module abstracts

Steganography and Document Metadata

If you think that a paper document is not intelligent, think again. Many system generated documents carry machine readable information, most of it virtually invisible to the naked eye.

You will learn about:

- machine-based steganography
- digital watermarking within images
- glyphs, linear, 2D QR barcodes

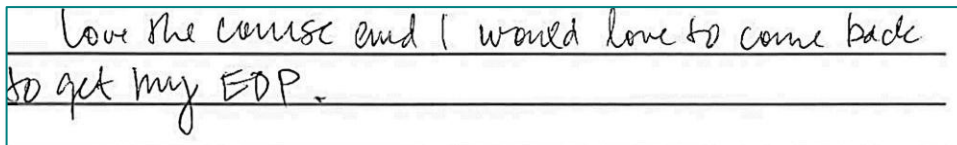
Laser Printing Technology

Almost all transaction mail is produced today on electrophotographic printers, affectionately called lasers. This class presents a review of this process, the differences between continuous and cut sheet paper paths, and the nuances of resolution versus perceived quality.

Ink Jet Printing Technology

Ink jet production printers are becoming a major alternative to electrophotographic printers, especially for process color onto blank stock.

By the end of the class you will be more familiar with the ink-jet process, including the fundamentals of paper and ink that impact quality and cost. You will also be introduced to the different types of production ink jet technologies.



Love the course and I would love to come back to get my EDP.

Operational Environment

Production printers and inserters require special environments to ensure:

- sustained production
- optimal print quality
- reliable inserting

The performance of even the best designed and manufactured device will quickly deteriorate without proper conditions and pre-emptive care. You will be familiarized with:

- characteristics of supported production environments
- critical operator tasks
- supplier maintenance planning

Module abstracts

Paper Specifications

Paper's not just paper. There are over 50 different types of business paper available, most of which would be disastrous if used on a production printer or inserter. There are also numerous weights and sizes to choose from.

You will become more familiar with:

- types of paper appropriate for high volume production
- difference between electrophotographic and ink jet paper
- how to properly condition paper for production

Inserting Technologies

All seasoned document production people know that most problems happen at inserting. This step is:

- the most mechanical
- the least automated
- subject to human/operator error

Every document that jams on the inserter has to be recovered and reprinted. Every page that sticks to someone else's document could cause extensive litigation and tarnish to the organization's brand.

You will learn about:

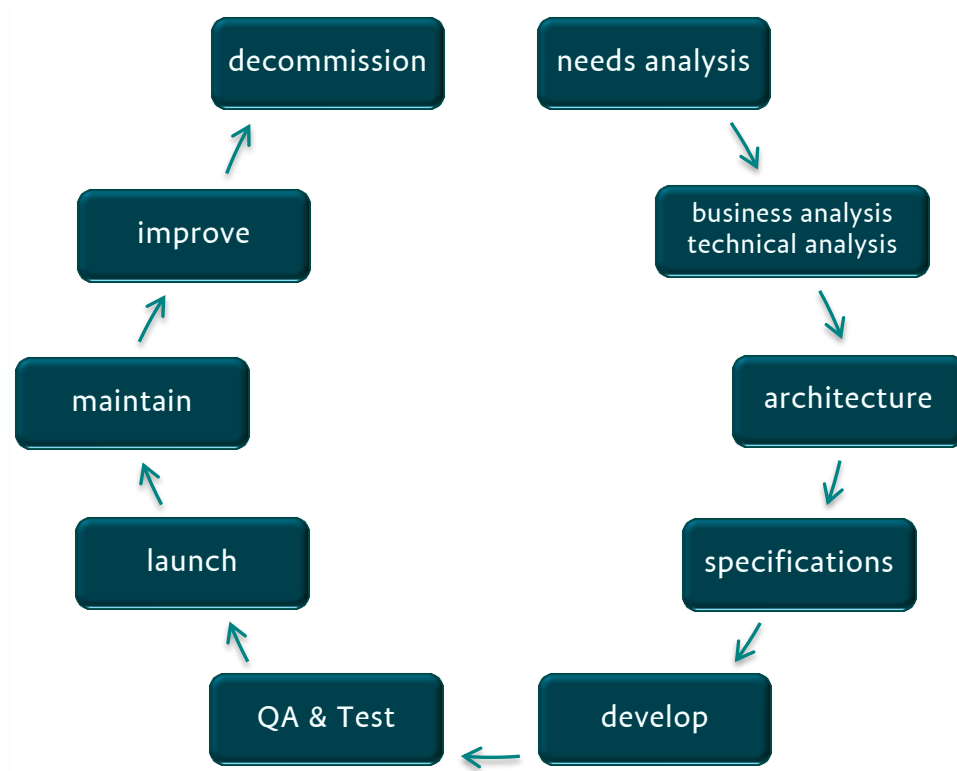
- sub-components of a production inserter,
- use of barcodes to manage the process,
- software-based document control

Postal Preparation and Requirements

The Post Office is a unique entity under law. It is neither a courier nor internal mail. It has processes and regulations that give it unique power in the business world, regardless of which country you operate. You will learn about postal history, regulations and processes.

You will learn about four-state barcodes and tracking mail-pieces within the postal environment.

Document Systems Lifecycle



Two-day class

New direction: you ask your people to investigate TransPromo, which is the process of designing, developing, and producing a new transaction document, and they thought it was a bus pass promotion.

Mergers and acquisitions: you just took over Toxic National Bank and now have to absorb and manage a different print architecture into your current process. Senior management wants your recommended outline for integration by Monday and a 3 to 5 year strategy for growth to boot.

Replacing B&W with Color: the current printer fleet is gasping for air, costs are going through the roof, and reliability has gone out the window. You want to do the right thing and take advantage of new technology and the right architecture, but your experience is all you can draw upon, and you have never taken on such an undertaking.

Traditionally, the analysis, specification development, selection, and implementation of new functions or systems have tended not to follow formal processes. In many cases, incremental functions added as needs evolved, and new solutions may have been rushed and thrown together in order to meet immediate needs. There are proven methodologies available from needs analysis and business planning, through formal development steps into production, during the production life, and finally at de-commissioning.

This two-day course explains the concepts of these successful methodologies, using three industry case studies.

Lifecycle course agenda

Module Abstracts

Introduction to Life Cycle

What are the various phases of the Life Cycle? How do they fit together? What are the benefits of each step? During this session, the student will be given an overview of the cycle, the value of a formal life cycle process, and how to provide input into the process.

Requirements gathering

During this phase, we identify the business problem(s) and initial plan to address them. Topics include:

- determining stakeholder needs
- compliance and legal issues
- client and internal feedback
- ranking of requirements, developing a point system for evaluation, and determining non-negotiable items

Technical analysis

During this session we identify the current state of technology or process, the desired technology or process, the gap, and the anticipated project path to the desired state. Activities and roles include:

- Assessment of current technology against ranking criteria
- Identification of enhanced or replacement technology
- Comparison to Best Practices

Business analysis

During this session, we identify current costs, potential cost-savings, costs of conversion, and potential costs of inertia. Topics include:

- cost benefit analysis
- increased revenue or profit opportunities
- economic risks from change or potential disruptions

Architecture

During this session, we review the development of an overall architectural schema and project plan. Topics include:

- development of the application workflow
- identification of ADF reconciliation steps
- initial mock-up of document to be produced

Specifications

During this session, we adapt the architectural documents and plans produced. Topics include:

- creation of document design guide
- creation of functional specification
- any documents that support the developed document

Module Abstracts

Development

During this session, we review the steps undertaken in the programming, installation, or procurement of the necessary components to create the solution:

- project review meetings
- document design reviews
- management of programmers
- phased implementation steps
- facilities requirements and planning

Test and quality assurance

During this session, we discuss creating and performing tests on the components and on the integrated system. Topics include:

- test case development
- installation integration testing
- data to 'client receipt' testing

Launch

During this session, we discuss the promotion of the process into production. Topics include:

- initial staff training
- service level agreements
- finalization of success or failure measurements

Additional Comments:

① Yes I will consider the cause for the development & QA Teams.

② I would like to get my EDP next year.

Maintenance

During this session, we discuss the management of the production process. Topics include:

- paper and environment
- ongoing training
- technical support

Continuing Improvement

During this session, we discuss the management of process improvement. Topics include:

- change control
- identification of new business issues or requirements

De-commissioning

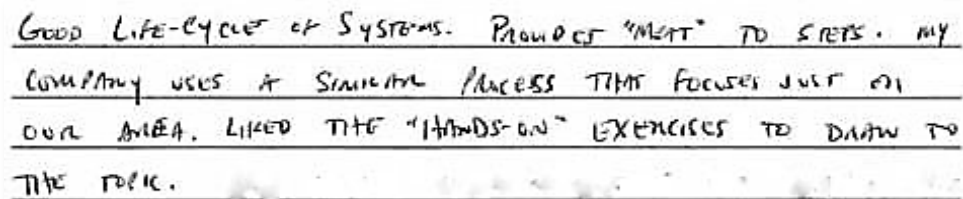
During this session, we discuss the removal of process management of the production process. Topics include:

- legacy issues and requirements
- orphan documents
- un-anticipated benefits, costs and risks

Stakeholder management

During this session, we discuss the ongoing management of stakeholder requirements. This includes:

- development and delivery of presentations and proposals
- finalizing any legal issues including intellectual property, contractual, security, or confidentiality issues
- finalizing specification and contracts
- RFIs and RFPs – what these actually are, how to do them, when to do them, etc.



GOOD LIFE-CYCLE OF SYSTEMS. PROVIDES "MEET" TO STRETS. MY COMPANY USES A SIMILAR PROCESS THAT FOCUSES JUST ON OUR AREA. LIKED THE "HANDS-ON" EXERCISES TO DRAW TO THE TOPIC.

Document Production Best Practices

One-day class

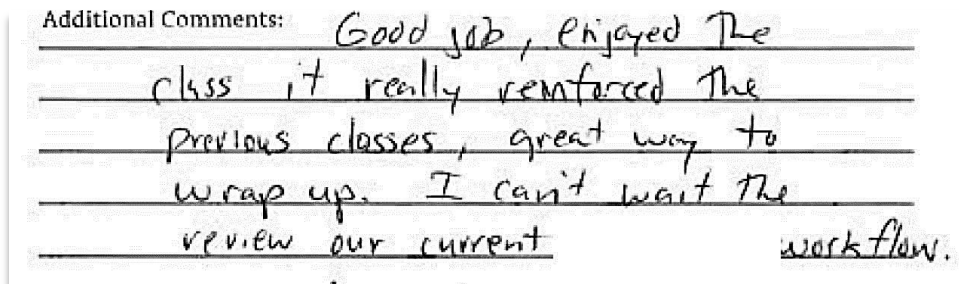
Course Summary

You have good people and they are good at what they do! But are they up to speed on the latest trends in the market? Are they aware of technologies and solutions that are considered best practices by industry experts? Do they have the knowledge to compare one solution over another, especially when it comes to compliance issues and audit capabilities?

Also, regulators have dramatically increased business audit requirements. Industry professionals need to understand the latest:

- technologies,
- practices
- techniques

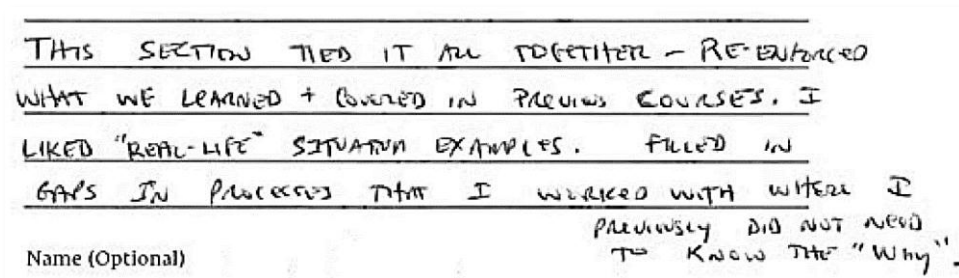
associated with the document production workflow.



Course topics

The course includes best, acceptable and bad practices in the following topics:

- Document design and color practices
- Data extraction and formats
- Object and Message Management
- Document composition
- Print streams, manipulation, and transforms
- Presentation management
- Archiving, viewing and electronic delivery
- Laser and Ink Jet Print technologies
- Inserting technologies
- Postal practices and standards
- Service levels



School content developers

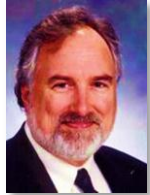


William Broddy m-edp, *IMERGE Consulting*

assists major organizations across North America with transaction document best-practices, market planning, and implementation.

Bill brings over 30 years' experience in electronic document enabling and delivery. During this period he was Canadian Product Manager for printing and publishing systems and was

a product planner with IBM in the Boulder AFP lab. His expertise was recognized in 2004 with the most prestigious "Xplorer of the Year" award. Bill earned his EDP in 1993 and 'Master Electronic Document Professional' in 2010.



William McCalpin m-edp, *MHE Consulting*

is principal and co-founder of MHE which specializes in the product, strategy, and technology issues in the area of the communication and presentation of information via electronic printing, imaging, and the Internet.

Bill has more than 30 years' experience in software development and consulting, including General Manager of Xplor International, and was Vice-President of Product Marketing at

Xenos.

Bill has earned numerous professional designations, including EDP in 1993 and 'Master Electronic Document Professional' in 2010.



Dr. Michael Turton edp, *Cavendish Consultants*

has been designing documents for over two decades during which time he witnessed the birth of desktop printing and laser production printers.

He designs mission critical transaction documents and forms. His designs not only look good but work well. When he is not designing documents, he helps companies develop and implement document strategies.

Lead instructors



William Broddy m-edp,
IMERGE Consulting



William McCalpin m-edp,
MHE Consulting

US Instructor



Kevin Lantaff, *Discoveries Consulting*

focuses on customer insight and communications, digital publishing and printing, and business culture and ethics. He brings over 30 years of printing and publishing experience from supplier, service provider, and customer positions.

He is well versed in production process steps, technologies and architectures used within the Corporate, Commercial and Direct Marketing segments. Career highlights include leading the effort and launch at IBM InfoPrint Solutions into the Commercial print, consulting on 1:1 direct marketing and PURL systems, and launching complex database publishing output for high speed inkjet presses.

UK Instructors

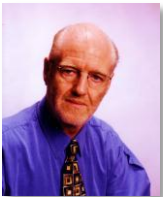


Roberta McKee-Jackson edp, *RSM Consulting*

has 27 years market development and programme management expertise in digital document communications. She serves as Director of Operations for the Xplor UK & Ireland Ltd region, as well as Editor-in-Chief of *e•views Journal*.

Roberta received her edp certification in 1994, recertifying in 2000, 2005, and 2010; was honoured as an OutputLinks Woman of Distinction in 2002; and received a special award for long-standing dedicated service to Xplor International in 2010.

Neil Merchant edp, *Grey-matter Consulting*



Neil has over 30 years' experience in IT, primarily in transactional documents, as a project manager, technical architect, and strategist for American Express.

He has also been an active leader in both Xplor International and the Xplor UK & Ireland region. Neil earned his Xplor edp certification in 1999.

Upcoming courses

Transaction Document School	
Toronto	May
Chicago	June
Ottawa	June
Toronto	August
Vancouver	September
London	3 rd quarter
Toronto	November

EDP Candidate Skills Assessment Workshop	
Canada	May / June / August / Sept
US	Via webinar

*acadami*TM

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