



## **HP Exstream**

Exstream Version 6.1 - Version 7.0  
Live Editor Version 1.5 - Version 2.0

# Course 152: **Dialogue Live Fundamentals**

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# Course overview

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Enterprises use a variety of document types to complete important business tasks, including customer correspondence, enrollments, and proposals. Historically, enterprises have lacked a flexible way to customize documents without providing "all or nothing" access to document templates. This scenario is costly, creates opportunities for error, and can lead to customer dissatisfaction.



Discuss the types of customer documents your enterprise creates and distributes on a daily basis. What challenges does your enterprise face?

Integrated with Dialogue, Dialogue Live is an interactive document automation solution that streamlines enterprise document processing, production, and fulfillment. Dialogue Live provides a common infrastructure for managing the editing of all types of interactive documents across the enterprise, allowing enterprises to take their existing documents and add control, intelligence, and automation to an otherwise static and unwieldy processing scenario. This course provides a fundamental overview of the features and functions that can be incorporated into a Dialogue Live Format (DLF) document that will help enterprises automate customer-facing documents.

## Audience

This course is useful for individuals who need a high-level overview of the benefits and features of Dialogue Live in order to provide implementation guidelines and directives for their own enterprise document needs.

## Prerequisites

Prior to taking this course, you should have completed the following course:

- ◆ 101: Introduction to Dialogue

## Course goals

When you complete this course, you will be able to:

- ◆ Identify how Dialogue Live addresses common problems enterprises face in three of the most prevalent document types: correspondence, enrollments, and proposals.
- ◆ Identify how Dialogue Live easily integrates with document processing solutions to provide a powerful document editing solution.

## Course design

This course consists of a series of instructional modules that correspond to the course goals. Each module includes exercises and discussions to provide you with opportunities to acquire hands-on experience.

### Module 1: Using Dialogue Live for correspondence

In this module, you will look at how features within Dialogue Live can increase the control of content and format while also increasing the flexibility for end users to customize correspondence. Additionally, you'll examine how Dialogue Live simplifies the correspondence workflow for both on-demand and high-volume mailings.

### Module 2: Using Dialogue Live for enrollments

In this module, you will look at how features within Dialogue Live can improve the quality of information given to the customer and decrease the work effort required to complete the enrollment application. Additionally, you'll examine how Dialogue Live simplifies the enrollments workflow.

### Module 3: Using Dialogue Live for proposals

In this module, you will look at how features within Dialogue Live can improve the quality of proposal content and decrease the turn-around time for developing customized proposals. Additionally, you'll examine how Dialogue Live simplifies the proposal workflow.

### Module 4: Dialogue Live architecture and interface

In this module, you will look at how Dialogue Live fits within the Dialogue architecture, as well as the modules that make up Dialogue Live and the Live Editor interface. Additionally, you'll examine the contents of a Dialogue Live Format (DLF) file.

## Course conventions

The following conventions are used in this course:



The glasses indicate the start of a demonstration by the instructor.



The computer indicates the start of an exercise.



The question mark indicates the start of a list of discussion or quiz questions.



The exclamation point indicates a warning or other important information that can help you help you avoid a negative result, such as a loss of data, formatting error, or system crash.

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### Note:

Notes contain additional information, reminders, or tips that can be useful depending on your task.

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### TEXT CONVENTIONS

TEXT TYPE	DESCRIPTION	EXAMPLE
<b>Keystrokes</b>	Text that you enter on the program interface, or a file location on the hard drive.	Enter <b>Lexington</b> in the text box.
<b>Interface</b>	Text that appears within the program interface.	Select the <b>Enable</b> check box.
<i>Reference</i>	The name of a reference guide or course title that can provide you with more information on the current topic.	For more information, see the <i>Interactive Documents</i> guide.





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# Module 1: Using Dialogue Live for correspondence

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Modern enterprises face many challenges in today's market: increased competition, saturated markets, and rising customer acquisition costs. Correspondence is one of the most important relationship-building opportunities your business can have with customers, but if executed poorly, it can damage or even end customer relationships. Sending correspondence that is unclear, confusing, or incorrect can result in poor customer perception and require even more correspondence to correct the situation. To improve profitability, business leaders must balance cutting operational costs with providing exceptional service.

One of the most common types of enterprise documents companies generate, correspondence typically falls into two categories: one-to-one documents delivered on demand or one-to-many documents delivered in high-volume bulk mailings. Managing the content of many correspondence types, while allowing for flexibility and control, represents a challenge facing enterprises today.

Dialogue Live provides solutions for both one-to-one and one-to-many documents that help enterprises cut costs, decrease document processing times, automate compliance, enforce branding standards, and improve the quality of documents delivered to current and potential customers.

In this module, you will take a close look at the advantages of using Dialogue Live to manage your enterprise's on-demand and high-volume correspondence needs.

## Objectives

After you complete this module, you should be able to:

- ◆ Describe how Dialogue Live can be used to solve on-demand correspondence challenges.
- ◆ Describe how Dialogue Live can be used to solve high-volume correspondence challenges.
- ◆ Explain how Dialogue Live streamlines the correspondence workflow.

## Terms

Important terms used in this module include:

- ◆ **Design layer**—A virtual layer that selectively adds and removes content in a DLF
- ◆ **DLF**—Dialogue Live Format
- ◆ **Distribution list**—A file you can upload to a DLF to add customer information
- ◆ **Live area**—A dynamic area in a DLF that can be included or excluded based on customer information or end-user selections. Live areas might or might not be editable.
- ◆ **Theme**—A visual indicator that lets you know at a glance the action you have performed or can perform on an object

## One-to-one documents

Enterprises generally deliver one-to-one documents on demand to support back-end enterprise applications, such as those used for claims processing or customer service activities. To deliver one-to-one documents, company representatives create correspondence based on an individual customer's needs. For example, when a cus-

customer signs up for new services, the company might send a letter that describes each service; or, when a customer calls customer service with a complaint, the company might send an apology letter that includes a resolution. Developing and customizing effective one-to-one documents that contain content that directly addresses the individual customer and is effective in its message is often a manual, labor-intensive process.

## Scenario: insurance industry on-demand correspondence

Atlas Mutual Insurance is a national provider that offers a wide variety of insurance policies to its customers. Atlas currently has a large stock of general word processing templates available for its field office representatives to use when sending correspondence, but there are several challenges associated with this approach. Since some field offices resell Atlas Mutual Insurance products under a different company name, each of these templates has to be modified to include the correct company name, agent name, and contact information; the more agents that work in an office, the more modification is required. The result is that some documents are not as professional-looking as the original templates.

One area of particular concern for Atlas is the letter sent in response to customer requests for new coverage. This letter must not only address the specific type of insurance coverage the customer is interested in, but must also include the correct policy information package. Because of the open nature of the templates, Atlas cannot enforce its standard wording and branding related to each policy type. Additionally, the search for and inclusion of the policy information packages requires a manual process. With all of this manual intervention, there is a lot of opportunity for error. Atlas Mutual Insurance wants an interactive correspondence template that provides control of brand compliance, allows field offices to customize and target the letter without changing the format, and automates the inclusion of policy information packages.



[View the Atlas letter.](#)

## Atlas Mutual Insurance letter



Make Read Only

## YOUR INSURANCE AGENT



**Sam T Moore**  
*Independent Broker*  
 Atlas Insurance  
 9302 Peachtree Road  
 Atlanta, GA 33333  
 Phone: (270) 398-3992  
 Fax: (270) 398-0843

Enter Date

Dear Jennifer,

We understand that you looking for some information regarding new insurance coverage. We are a global provider of a variety of products. Our goal is to provide the lowest cost options to all customers. We look forward to hearing back from you and find the provided material informative and appealing to your needs.

We know that insurance matters can sometimes be confusing. So, we have tried to organize this important package of information as simply as possible. Please add this package to your other insurance papers in a convenient place for reference.

Jennifer, we value our relationship and look forward to continuing to serve you. If you have any questions or need additional information, I will be glad to assist you.

Sincerely,

*Sam Moore*

Sam T Moore  
 Independent Broker



If this document was a standard document created in a typical word processing program, what problems might you encounter in the following situations? How much time would each resolution take?

1. If you wanted to change the logo?
2. If you wanted to change the picture of the agent?
3. If you wanted to change the date?
4. If you wanted to create a write-protected version of the letter for archiving purposes?



Open and explore the Atlas letter in Live Editor.

1. Open the `C:\152 Dialogue Live Fundamentals\Output Files` folder.
2. Open `AtlasLetter_OnDemand.dlf`.
3. Click the Atlas logo.  
Arrows appear to the right of the image.
4. Click an arrow to select another image.
5. Click **Enter Date**.  
A calendar opens.
6. Select the date one month from today.
7. In the first paragraph, second sentence, change **We are** to **Atlas Mutual Insurance Company is**.
8. Try to edit the last paragraph.

You have just opened and explored a Dialogue Live Format (DLF) file in the Live Editor environment. Despite its similarity in appearance to typical documents, a DLF is a powerful document that distinguishes itself because of its ability to be intelligent and interactive. When you move the pointer over various areas of the document, you can see interactive features and Live areas that let you interact with the document, some of which can affect other areas of the document when edited. In the Atlas Mutual Insurance letter, you might have noticed a few things:



- ♦ Clicking the logo made arrows appear, which let you scroll to select another logo. Selecting a new logo also triggered a change in the agent's picture, contact information, and signature.
- ♦ Clicking the date revealed a user-friendly calendar for you to select a new date, which was added to the document, fully formatted.
- ♦ Hovering the pointer over sections of the body text triggered tool tips that provided information to help you understand what edits you can make to the document.
- ♦ Some areas of the document were protected and would not allow you to make changes.
- ♦ Clicking the **Make Read Only** button write-protected the file, and would not allow you to make further changes.

Live Editor provides several visual indicators you can use as you edit a DLF. These visual indicators help you identify which areas you can edit, the types of information you can enter, the actions you can take, and which tools you can use as you work. The Atlas Mutual Insurance letter includes a specific theme, several types of Live areas, and design layers.

## Themes

Themes are visual indicators that let you know at a glance the action you can perform, or have performed, on an object. For example, a DLF can use a theme that shades all text you must edit in green. Once you have changed the text, the shading changes to red to indicate the text has been edited.

### Note:

If you cannot see the theme colors, click **Theme View**  on the Live Actions toolbar. To see how the DLF will look once it is printed, click **Theme View**  again to toggle off the themes.

Document designers can provide multiple themes for a DLF. For example, a DLF can contain two themes: one for the first editor and another for the approver.

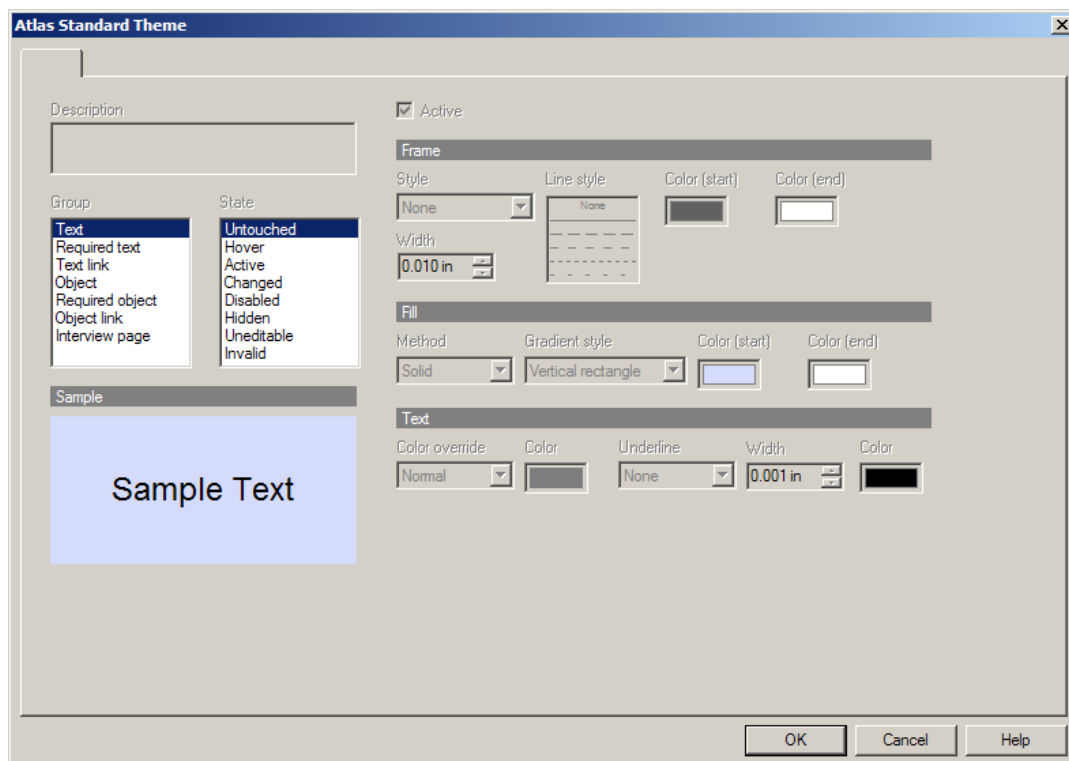
You can view the properties of a theme if you want to know what the colors and shading in the theme mean. End users cannot change the properties of a theme, however; these properties are set in Design Manager during design.



View the theme properties in the Atlas Mutual Insurance letter.

1. Select **Live -> Theme**.  
The **Atlas Standard Theme** dialog box opens and displays the theme properties.
2. Click on selections in the **Group** and **State** boxes to see what the colors and shading in the theme represent.

### Atlas Standard Theme dialog box



## Live areas




Live areas are dynamic areas in a DLF that can be included or excluded based on customer information or end user selections. They can also be programmed to trigger additional responses from other Live areas on the page. For example, in the Atlas Mutual Insurance letter, when you change the logo, the agent's photograph, contact information, and signature also change automatically. This interaction shows how Dialogue Live can ensure consistency across a document package by controlling the input of information that could be overlooked during manual document processing. It also reduces the amount of work necessary when making changes, since one small change can trigger many responses.

Live areas might or might not be editable. In the Atlas Mutual Insurance letter, the date is a Live area that is editable, while the agent's signature is a Live area that is non-editable.

Document designers can also choose to hide Live areas in a DLF. When all the Live areas are visible in the DLF, the themes can help you understand how to use the Live areas that are editable.



View and navigate the Live areas in the Atlas Mutual Insurance letter.

1. On the Live Actions toolbar, click **Show Hidden** . Hidden areas appear in the DLF.
2. Click **Previous Live Area**  and **Next Live Area**  to navigate between Live areas.

## Editable Live areas in the Atlas Mutual Insurance letter

1 →

2 →

3 → 

We understand that you looking for some information regarding new insurance coverage. We are a global provider of a variety of products. Our goal is to provide the lowest cost options to all customers. We look forward to hearing back from you and find the provided material informative and appealing to your needs.

4 → 

☐ Buying a boat is a exciting endeavor. But we also understand that security in such an investment is a critical aspect. Our boat policy coverage does not discriminate on your port of call so you can enjoy your time on the water and not have to worry.

☐ Securing your home from the unexpected is a concern for most. Your home is the single largest purchase you will make. We believe insuring this investment does not have to be equally costly to you. Our home owners coverage is a full coverage plan and not selective.

☐ Automobile insurance can be a confusing. We provide a uniform coverage plan for auto that includes guaranteed minimums to protect the driver, the passenger, the car, and any victims. So, put the joy back into driving and leave the worry behind.

☐ Today, lawsuits are everywhere. Homeowners, auto, and watercraft policies have a limit on liability insurance. If an unfortunate accident should happen that is your fault, do you have enough liability insurance from your current policies to cover your costs for negligence? Since no one can predict how much a judge may award the injured person, umbrella insurance is not just for the wealthy anymore, but a needed protection for every policyholder.

We know that insurance matters can sometimes be confusing. So, we have tried to organize this important package of information as simply as possible. Please add this package to your other insurance papers in a convenient place for reference.

Jennifer, we value our relationship and look forward to continuing to serve you. If you have any questions or need additional information, I will be glad to assist you.

Sincerely,  
  
Sam T Moore  
Independent Broker

5 →

**YOUR INSURANCE AGENT**  
  
Sam T Moore  
Independent Broker  
Atlas Insurance  
9302 Peachtree Road  
Atlanta, GA 33333  
Phone: (270) 398-3992  
Fax: (270) 398-0843


The Atlas Mutual Insurance letter is designed to allow you to edit the following Live areas:

1. **Image Picker**—You can use the Image Picker to control the images placed within a DLF. You can also tie the image to a variable, which can trigger changes in other sections of the document.
2. **Calendar Picker**—You can use the Calendar Picker to control the formatting of dates used within a DLF.
3. **Editable paragraph**—You can edit all the text in the paragraph, which provides flexibility in personalizing a DLF.
4. **Selection group**—You can select one or more check boxes in a selection group to control the text added to a DLF. Selection groups provide control over the wording and formatting.
5. **Button**—You can click a button to complete actions with a DLF, such as submitting it to a manager for review and approval.

## Design layers

Design layers let you see how a document looks with or without certain objects. A DLF can have two types of design layers: printing and non-printing. Printing design layers are useful during design and production, since they can be hidden or shown as needed to help with design placement or provide information about the document. Non-printing design layers let you see how objects that are not part of the page, such as pre-printed letterheads appear in the final output; or, they can include objects the customer never sees, such as barcodes or printers' marks used by production equipment.

Document designers can provide multiple design layers for a DLF. For example, a DLF might include a printing design layer with a "DRAFT" watermark and a non-printing design layer with the letterhead. The Atlas Mutual Insurance letter includes a non-printing design layer that allows the end user to make the finished letter read-only.

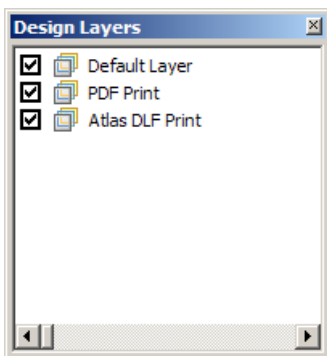
The Atlas Mutual Insurance letter allows you to show or hide specific design layers, but some designs allow you only to show or hide all design layers by using **Toggle Live Layer**  on the Live Actions toolbar.



Show and hide the non-printing design layer in the Atlas Mutual Insurance letter.

1. If not selected, select **View -> Design Layers**.  
The Design Layers panel opens.

### Design Layers panel



2. On the Design Layers panel, clear the **Atlas DLF Print** checkbox.
3. The **Make Read Only** button disappears, and Live Editor displays the DLF as it will look when printed for the customer.
4. Select the **Atlas DLF Print** checkbox to make the **Make Read Only** button reappear.

## One-to-many documents

Enterprises generally deliver one-to-many documents in high-volume bulk mailings to generate interest from a general or targeted audience. To deliver one-to-many documents, enterprises create documents in batch mode with little or no manual involvement. For example, an enterprise might send its newsletter to all customers; or, an enterprise might send a targeted advertisement to a select subset of its customers. The development and customization process for one-to-many documents often does not include a controlled editing environment to localize content, which can improve the effectiveness of the document and customers' impressions of the enterprise and its services.



## Scenario: travel industry direct mail

Worldwide Travel is travel company with a centralized marketing department that distributes marketing materials to its global offices. Each office has its own customer distribution list and often has the authority to adjust pricing, travel packages, and tour descriptions. They currently distribute the marketing materials using word processing documents, which each office then has to reformat and incorporate into their local marketing templates. The major challenge to this approach is that it can sometimes work against Worldwide Travel's marketing strategy; the company has discovered there is a market advantage to focusing on specific travel packages globally, but offices sometimes choose to delete these travel packages from their local advertisement. Worldwide Travel would like to have an interactive direct mail application that protects some information and travel packages from being changed or deleted, but also allows individual offices to adjust pricing or offer alternative packages to maintain competitiveness in their area.

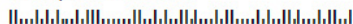


View the Worldwide Travel direct mail.

## Worldwide Travel direct mail



John Jefferson  
451 Atlantic Ave  
Dallas, TX 75201-2376



### Contact Information

Agent: James Brown  
Phone: 312-555-2392  
Fax: 312-555-2499  
Address: 880 S Lake Shore Drive  
Chicago, IL 60605  
[www.WorldwideTravel.com](http://www.WorldwideTravel.com)

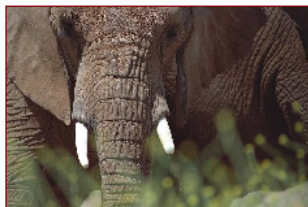
July 22, 2008

Dear John,

Let us plan your next vacation! Whether you are looking for a romantic getaway, relaxing, or exciting adventures or family fun, we can make it happen. We can make your airline reservations departing from any airport of your choice to any part of the world. We can arrange hotel packages to any destination of your choice or advise you on suitable accommodation for you, your family or your group. Day tours & excursions to nearby can be arranged to suit your every need, including boat and small plane charters.

Lost paradises, romantic getaways, ancient haciendas, elegant villas, intimate boutique hotels, tantalizing spas, private departures, personalized service, traditional cuisine, original itineraries and fabulous activities and tours. These are the ingredients of our very special Experience an Adventure™ collection, an exclusive concoction of romance and adventure, where days are spent negotiating rapids, observing wildlife, kayaking in pristine lakes, horseback riding or snorkeling in crystalline waters and evenings are filled with the sight of star-studded skies.

As a Worldwide Travel client, you may select from several special travel packages which have been developed specially for you. If you would like more information about these great getaways, contact Client Services at 512-602-1400. We are now featuring excellent Experience an Adventure™ vacation packages to the following locations:



### Sabi Sabi Safari

Inside the heart of nature, within the Sabi Sand Reserve, something enchanting lies in wait - Sabi Sabi Private Game Reserve. Take Land Rover excursions and catch the Big Five. This private game lodge in South Africa offers world-class standards in luxury accommodation, service, cuisine, special facilities, and exceptional wildlife encounters.

#### 6 NIGHTS PACKAGE Package ID: SS1625-2

Guests will spend two days in the old world romance of the legendary Sabi Sabi elati Lodge and a further two days at Sabi Sabi Earth Lodge - a state-of-the-art spiritual retreat. Nothing has been spared to leave guests with a truly unforgettable experience.

**October - December 2006: \$4650 pp**  
**May - September 2007: \$2300 pp**

Included: The price of the safari includes accommodation, all 3 meals daily (full breakfast, lunch and boma dinner), morning and evening open landrover safaris, sundowner drinks, soft drinks, mineral water and house wines, Sabi Sabi cap per person, one complimentary spa treatment per person, tourism levy and VAT.

The price excludes liquor, premium imported brands and cellar wine list, transportation to/from Johannesburg



### Romancing the Highlands

Experience the romantic castles of Wales, delight in the myths and legends of Merlin and King Arthur, and explore the majestic mountains and spectacular coastlines on this enchanting castle tour!

#### 7 NIGHTS PACKAGE Package ID: IC1231-0

Spend 2 nights in Conway with its 13th century castle and town walls built by King Edward 1st. Spend 3 days exploring the castle at Caernarfon. Spend 2 nights at the great castle at Manorbier with many explorable towers; enjoy the Welsh Culture with singing, dancing, storytelling and typical Welsh dishes and more. Accommodations in luxurious Country Mansions provides the perfect setting for a romantic getaway!

**October - December 2006: \$2,965 pp**  
**May - September 2007: \$3,735 pp**

Included: Roundtrip airfare on Delta Airlines with departure from JFK, New York. All accommodations. Breakfast, dinner and tax for two daily.

Option for a rental car add on.



### Bora Bora Bliss

The quintessential South Seas island, Bora Bora with its dramatic 700-meter peaks and shimmering lagoon will quickly put you under its spell—as will the luxurious resorts, superb scuba diving and dining, and nightly Tahitian dance performances.

#### 5 NIGHTS PACKAGE Package ID: DB4290-6

Experience the charm and hospitality of the Tahitian people during your romantic vacation in the lush tropical islands of Tahiti, Bora Bora and Moorea. If a lover of white sand beaches and relaxing seclusion, look no further as the South Pacific Islands offer the world's most stunning beaches as well as superb aquatic adventures. In addition to relaxing in paradise, you can swim with dolphins, feed sharks and stingrays and much more.

**October - December 2006: \$5,345 pp**  
**May - September 2007: \$4,265 pp**

Included: Roundtrip airfare on American Airlines with departure from LAX. 3-nights Tahiti, 3-nights Moorea, 3-nights Bora Bora, 5 continental breakfasts, inter-island airfare, transfers, flower lei on arrival and shell lei on departure and complimentary activities.

The price excludes transportation to/from the destination airport.







If this document was created with a typical word processing program, how would you address the following situations? What additional processes or documents might you need to involve?

1. If you wanted to enforce standard wording, branding, or pricing?
2. If you wanted to change the picture associated with a travel package?
3. If you wanted to limit the pictures that could be used for a travel package?
4. If you wanted to advertise different trip packages for different distribution lists?



Open and explore the Worldwide Travel direct mail.

1. Open the `C:\152 Dialogue Live Fundamentals\Output Files` folder.
2. Open `Travel_Mailer.dlf`.
3. On the Live Actions toolbar, make sure **Theme View**  and **Show Hidden**  are active.
4. Click **Previous Live Area**  and **Next Live Area**  to navigate between Live areas.

The Worldwide Travel direct mail contains some of the same visual indicators and Live areas that you saw in the Atlas Mutual Insurance letter, such as the Calendar Picker and tool tips. In the Worldwide Travel direct mail application, you might have noticed a few additional things:

- ◆ Most of the text areas of the document were protected, and would not allow you to make changes. This protects the content approved by the central marketing department.
- ◆ The editable text in the document ranged from just the prices—roughly the length of a single word—to an entire paragraph. This shows that an editable area in Dialogue Live is not just restricted to large blocks of text, but can also be applied to single words—even if those words are nested in a non-editable paragraph.
- ◆ Clicking the photograph of the elephant allows you to select another image from your hard drive. This image gets uploaded and stored within the DLF.
- ◆ Clicking the photograph of the beach made arrows appear, which let you scroll to select a photograph of Budhapest. Changing the photograph also changed the associated travel package name, description, information, and prices.

In addition to the visual indicators and Live areas discussed in the Atlas Mutual Insurance letter, the Worldwide Travel direct mail application includes two types of image swap controls and the ability to upload a distribution list.

## Image swap controls

Dialogue Live provides two controls to allow end users to swap images in a DLF:

- ♦ Import an Image
- ♦ Image Picker

### IMAGE SWAP CONTROLS AT A GLANCE

IMAGE CONTROL	WHAT IT DOES	WHEN TO USE IT
Import an Image	Allows end users to access an external source, such as a network folder, their own hard drive, or a database, to import an image.	<ul style="list-style-type: none"> <li>• You want to allow free access to any available images.</li> <li>• It is not important to control the images used in a document.</li> </ul>
Image Picker	Allows end users to select one of a select group of images contained in the DLF. The images available are determined by the document designer.	<ul style="list-style-type: none"> <li>• You want to provide a limited set of images from which to choose.</li> <li>• It is important to control the images used in a document, such as for copyright, trademark, branding compliance, or corporate standards.</li> </ul>

As in the Worldwide Travel direct mail, you can use both types of image swap controls within the same DLF.

## Import an Image

The Import an Image control provides the most flexibility for swapping images in a DLF, since it allows the end user to select locally-relevant images that will be enticing to their customers. A major benefit of this control is that imported images maintain the document's format integrity, since they do not change the size of the frame containing the image. The Import an Image control is useful when corporate images change frequently or, in a distributed environment, when individual business units share marketing materials, but have different brands or offer slightly different products or services.

Document designers can add tool tips or customize the theme to help end users identify when they can import an image.



Import an image in the Worldwide Travel direct mail.

1. Double-click the photograph of the elephant in the "Sabi Sabi Safari" travel package. The **Import an Image** dialog box opens.
2. Open the C:\152 Dialogue Live Fundamentals\Image Files folder.
3. Select an image and click **Open**.  
The image you selected replaces the elephant.

## Image Picker

The Image Picker provides more control of the images used in a DLF, since it allows the end user to select only the images that are included in the DLF during design. A major benefit of this control is that images can be tied to relevant text that can change when the end user swaps images. The ability not only to control images, but also to control the content and formatting of the associated text, saves time and eliminates error.

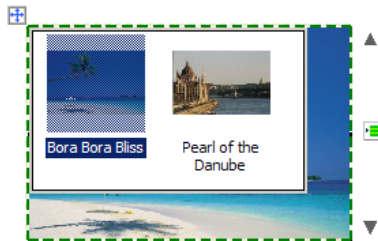
Document designers can add tool tips or customize the theme to help end users identify when they can import an image.



Use the Image Picker to swap an image in the Worldwide Travel direct mail.

1. Double-click the photograph of the beach in the “Bora Bora Bliss” travel package. The available images appear in the Image Picker.

### Image Picker



2. Double-click the “Pearl of the Danube” image. The image and text associated with the “Pearl of the Danube” travel package replaces the image and text associated with the “Bora Bora Bliss” travel package.

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### Note:

You can also click ▲ and ▼ to browse through available images without opening the Image Picker.

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## Distribution lists

Distribution lists are files you can upload to a DLF to add customer information. Distribution lists are useful if you want to create and distribute global documents, yet allow individual business units to localize and distribute the documents to their own customer lists.

Document designers can define which file types can be uploaded to the DLF.



Upload a distribution list to the Worldwide Travel direct mail.

1. On the Live Actions toolbar, click **Upload Distribution List** .  
The **Upload Distribution List File** dialog box opens.
2. Open the `C:\152 Dialogue Live Fundamentals\Data Files` folder.
3. Select `Mailing List.csv` and click **Open**.  
Live Editor issues a message confirming the file upload.
4. Click **OK**.
5. On the Standard toolbar, click **Save** .



Complete fulfillment for the Worldwide Travel direct mail.

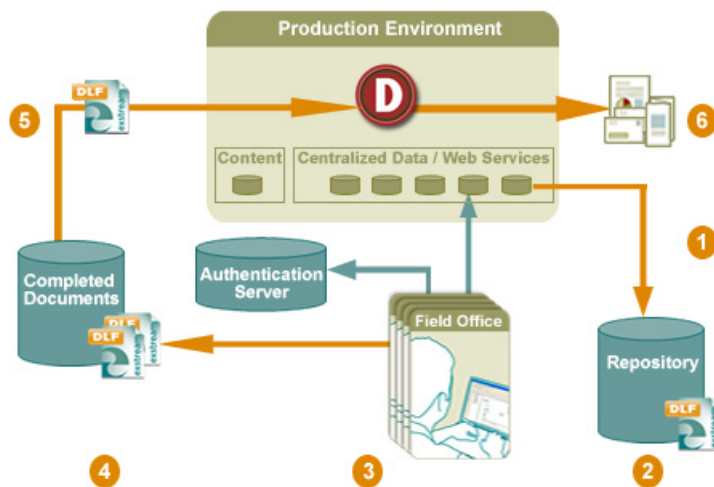
1. Open the `C:\152 Dialogue Live Fundamentals\Fulfillment Files` folder
2. Open `Travel_Mailer.cmd`.
3. When prompted, press any key.
4. Open the `C:\152 Dialogue Live Fundamentals\Output Files` folder.
5. Open `Travel_Mailer.pdf`.
6. Review the fulfillment document.

The Worldwide Travel direct mail application saves the mailing list data in the DLF file, and then uses it to drive the fulfillment process and customize direct mail for each customer on the mailing list. With this solution in place, representatives can produce competitive marketing that meets global marketing standards in less time.

## Correspondence workflow

Using DLFs in the correspondence workflow can provide enterprises with more control and flexibility than traditional templates. DLFs can increase document quality and customer satisfaction by making it easier for enterprises to produce standardized documents that directly address the customer's needs.

## Dialogue Live correspondence workflow



Dialogue Live simplifies the correspondence workflow:

1. The document designer creates a DLF and places it in a common repository.
2. The end user accesses the repository and opens the appropriate DLF.
3. The end user edits the DLF using Live Editor, and automatically validates the content and data against an authentication server and central databases.
4. The end user submits the DLF for processing.
5. Dialogue retrieves the DLF and processes it.
6. The final documents are sent to the customers via an automated process.



How does this workflow compare to your current workflow for correspondence?

## Summary



Using the correspondence examples in this module, discuss which features in Dialogue Live address or solve the problems identified below. How can you apply these features to your own documents?

1. Documents use a multitude of forms or templates.
2. Documents have no pre-fill or automated customization.

3. Documents are subject to data entry errors, require a manual input process, and inflate labor costs.
4. End users have to manually pick and pack documents for fulfillment and production.
5. On-demand documents do not generally have batch processes; once created, they are printed and stamped locally rather than going to a print queue to take advantage of bulk mail rates.
6. Customers become confused or upset when they receive the wrong documents or documents that are not targeted to their specific needs.



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# Module 2: Using Dialogue Live for enrollments

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As automation and access to information becomes more prevalent in daily life, enterprises must be increasingly committed to making information more accessible and processes more transparent and easy to follow. Customers are looking for faster, easier, and more responsive experiences when shopping for goods and services. Because the initial experience with a business is a key factor to customer retention, efficient enrollment processes are vital.

Dialogue Live provides an enrollment solution that is interactive, intelligent, and portable. It can also help an enterprise to manage the amount of paperwork, streamline information gathering and processing, and better target an enrollment customer's information needs.

In this module, you will take a close look at the advantages of using Dialogue Live to manage your enterprise's enrollment process.

## Objectives

After you complete this module, you should be able to:

- ♦ Describe how Dialogue Live can be used to solve enrollment challenges.
- ♦ Explain how Dialogue Live streamlines the enrollment workflow.

## Terms

Important terms used in this module include:

- ♦ **DLF**—Dialogue Live Format

## Enrollments

Enterprises generally have complicated enrollment processes that involve a lot of paper, time, and manual effort. For example, during a mutual fund account enrollment, a broker or financial advisor might schedule time with a new customer to complete numerous forms, go over a stack of disclosures, and provide a thick folder full of prospectuses to carry home. After the meeting, the broker or financial advisor either enters the data collected on the forms or hands off the forms to data entry personnel, providing an opportunity to introduce error. This process is typically followed by a manual, on-demand correspondence process to send the new customer a welcome packet. Processing inefficiencies can lengthen timelines for any required approvals, slow customer response, and make it difficult to get critical information and services to customers quickly.

## Scenario: financial industry enrollment application

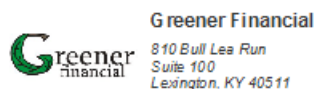
Greener Financial offers financial products and services in a regional market. The company recently implemented an online application form to streamline the enrollment process, but has encountered a few challenges with it. Since Greener Financial's financial advisors often visit their clients' homes and offices, they are not always able to complete the online form while with the client, and they sometimes must transfer the client's infor-

mation from paper after returning to the office. This means they must take time from selling to enter information for new accounts. Additionally, because of the wide variety of financial products Greener Financial offers, there is great potential for error and confusion during the enrollment process, which often results in a lag time during fulfillment of the online application. Greener Financial would like to have an interactive enrollment application that is portable, reduces possibility for error, and streamlines the fulfillment process.



View the Greener Financial enrollment form.

## Greener Financial enrollment form



Submit

Please enter your Greener Financial membership identification number

999-99-9999

Member ID (999-99-9999)

## 1 Personal Information

Dudley

First name

D

MI

Wright

Last name

11

22

1970

Date of birth (mm/dd/yyyy)

8251 Spring Street Apt 23

Residence address

Cove City

City

OH

State

45780

Zip

## Recently Purchased Funds

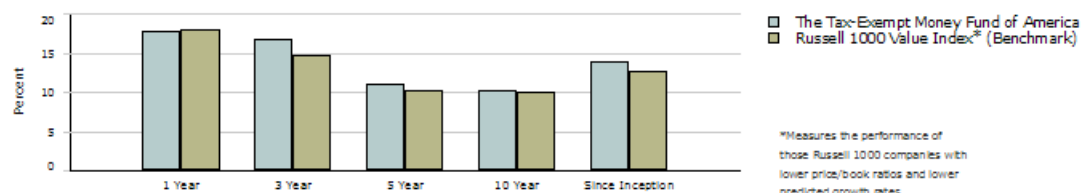
## 2 Automatic Purchase Plan

Purchase shares in your Greener Financial account(s) automatically

Fund Category	Fund Name	Amount (\$50 min per fund)
Bond funds	Greener Bond Fund	\$50.00
Growth-and-income funds	Greener Mutual Fund	\$100.00
Tax-exempt bond funds	U.S. Government Securities Fund	\$50.00
Money market funds	The Tax-Exempt Money Fund of America	\$100.00
		\$300.00

## Average Annual Returns

Display fund data in chart: The Tax-Exempt Money Fund of America



The performance data shown represents past performance, which is not a guarantee of future results. Investment returns and principal value will fluctuate, so that investors' shares, when sold, may be worth more or less than their original cost. Current performance may be lower or higher than the performance data cited.

**Note:** Greener Financial must receive your request at least two business days prior to the first transaction date requested. If no date is provided below, the option will be established the date received and transactions will begin the following month.

- A. Transactions should begin during the month of:** January
- B. Transactions should occur on the following day of the month:** 15th
- C. Frequency of automatic transactions:** Every other month

Greener Financial



If this document was a typical online application, how would you address the following situations? What additional processes or documents might you need to involve?

1. If you need to update the customer's name or contact information?
2. If you wanted to change the fund categories?
3. If you wanted to change the date or the frequency of automatic transactions?
4. If you wanted to review the performance of different funds?

## Interactivity, intelligence, and portability

While a paper form is portable, it cannot be interactive or intelligent; it cannot validate field entries, make changes to related fields based on data entered, swap images, or automatically enter or calculate totals based on the most current information available. A Web-based form can be interactive and intelligent, but is not portable because it requires a constant Internet connection. A DLF can be interactive, intelligent, and portable.

The portability of the DLF eliminates the need for multiple data entry points or Internet connectivity. Representatives can save any new or changed information within a local DLF and then upload the customer data after returning to the office. If portability is not an issue for your company, you can also utilize Web services with DLFs to exchange information with your company databases in real time.



Open and complete the Greener Financial enrollment form in Live Editor.

1. Open the **C:\152 Dialogue Live Fundamentals\Output Files** folder.
2. Open **Enrollment\_Form.dlf**.
3. In the **Personal Information** section, enter some fictional contact information for a new customer.
4. In the **Automatic Purchase Plan** section, select fictional fund categories and fund names, and enter purchase amounts for each fund selected.
5. In the **Average Annual Returns** section, click the fund displayed and select another fund from the drop-down list.
6. At the bottom of the page, select some timing options for the purchases of the fictional fund selections from the three drop-down lists.
7. Click **Submit**.
8. Open the **C:\152 Dialogue Live Fundamentals\Output Files** folder.

## 9. Open `Saved_EnrollmentForm.dlf`.

You may have noticed that this DLF has a simple, form-like design that uses features familiar to most users of paper and Web-based forms. Despite its similarity in appearance, the DLF has key differences:

- ◆ Changing your selection for **Fund Category** changes the options available to select for **Fund Name**.
- ◆ Entering amounts for each fund selected automatically calculates the total purchase.
- ◆ Entering amounts less than \$50.00 returns an error message.
- ◆ Changing the fund selected in the **Average Annual Returns** section changed the data displayed on the chart.
- ◆ Submitting the form creates a local DLF that contains the customer's data.

## Automated fulfillment

Fulfillment often involves duplication of effort, especially with data entry. Additionally, issues related to the non-portability of paper and Web-based forms can create lag times for fulfillment processing. Dialogue Live streamlines the fulfillment process by solving these issues.



Fulfill the Greener Financial enrollment application in Design Manager.

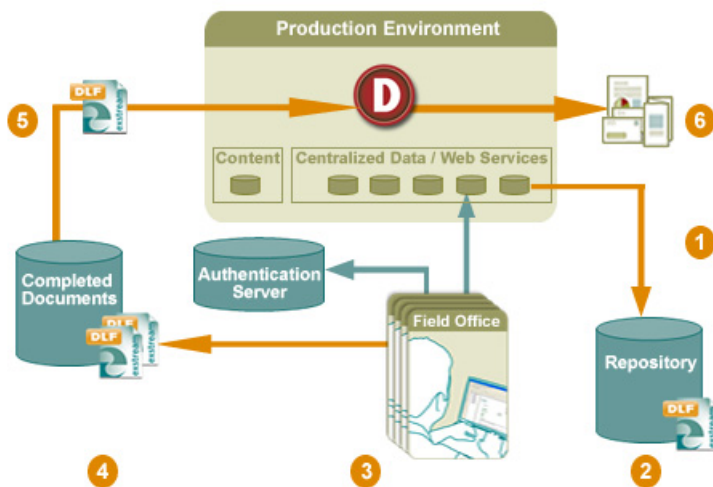
1. Open the `C:\152 Dialogue Live Fundamentals\Fulfillment Files` folder.
2. Open `Enrollment_Form.cmd`.
3. When prompted, press any key.
4. Open the `C:\152 Dialogue Live Fundamentals\Output Files` folder.
5. Open `PDF_WelcomeKit.pdf`.
6. Review the fulfillment document.

The Greener Financial Enrollment Welcome Kit Application uses the data saved in `Saved_EnrollmentForm.dlf` to drive the fulfillment process and customize the welcome kit document based on the customer's personal information and fund selections. With this solution in place, representatives can spend less time on data entry and more time selling funds. Additionally, customers receive accurate documents much more quickly, increasing customer satisfaction and retention.

## Enrollments workflow

Using DLFs in the enrollments workflow can provide enterprises increased data accuracy and a reduced workflow for enrollments. The portability of the DLF provides end users with more flexibility and less data entry than paper or Web-based forms. Additionally, the enrollments workflow can tie directly into the correspondence workflow, reducing response time and increasing customer satisfaction.

## Dialogue Live enrollments workflow



Dialogue Live simplifies the enrollments workflow:

1. The document designer creates a DLF and places it in a common repository.
2. The end user accesses the repository and opens the appropriate DLF.
3. The end user edits the DLF using Live Editor, and automatically validates the content and data against an authentication server and central databases.
4. The end user submits the DLF for processing.
5. Dialogue retrieves the DLF and processes it.
6. The final documents are sent to the customers via an automated process.



How does this workflow compare to your current workflow for enrollments?

## Summary



Using the enrollment example in this module, discuss which features in Dialogue Live address or solve the problems identified below. How can you apply these features to your own documents?

1. Enrollment documents have no pre-fill or automated personalization.
2. Enrollment documents are subject to data entry errors, require a manual input process, and inflate labor costs.

3. End users have to search for and compile the special forms required for unique events or products.
4. Enrollment forms take days to process.
5. Interactive online enrollment application forms require Internet access.





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# Module 3: Using Dialogue Live for proposals

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Often the first document a customer receives from a business, proposals play a critical role in the effort to acquire, retain, and grow customer relationships. If a customer is presented with unclear or inaccurate information, out-of-date pricing, or other errors in the proposal document, they will be unlikely to form or continue the business relationship. As with other customer documents, getting proposals perfect every time is critical for success.

Dialogue Live provides a proposal solution that helps enterprises improve the quality of proposals and decrease the time it takes to create them.

In this module, you will take a close look at the advantages of using Dialogue Live to manage your enterprise's proposal process.

## Objectives

After you complete this module, you should be able to:

- ◆ Describe how Dialogue Live can be used to solve proposal challenges.
- ◆ Explain how Dialogue Live streamlines the proposal process.

## Terms

Important terms used in this module include:

- ◆ **Interview page**—A non-printing page that uses a question-and-answer format to make it easier to edit a DLF

## Proposals

Enterprises generally deliver proposal documents in response to a request from a potential or current customer. Specific employees are often responsible for generating customized proposals based on an individual sales opportunity. Enterprises provide templates to enforce the proper formatting, branding, compliance, and legal content, and then employees update the variable information, such as the date, customer name, products or services offered, and specific terms or conditions.

Proposals present a significant risk to enterprises and require a workflow that ensures content control, oversight, and compliance. The proposal workflow relies on many departments within an organization for accurate content, pricing, and rate information, but this complexity provides many opportunities for error. Typically, if the proposal is successful, it is followed by the enrollment application and on-demand correspondence processes.

## Scenario: financial industry proposal

Greener Financial offers a variety of retirement and investment packages in a regional market. In addition to a large store of policy kits, Greener has a stock of word processing and presentation templates available for its sales representatives to use when preparing a sales pitch for a potential customer. Rather than starting from

scratch each time, the sales representatives typically re-visit past proposals, copy and paste as needed, and change information to suit the current customer. Then, the sales representatives take additional time to create a customized presentation based on the customer's needs, again re-visiting past presentations.

The manual copy-and-paste method is time-intensive and rife with opportunities for errors. Sales representatives can potentially leave out important legal information, provide outdated product information or costs, or inadvertently forget to change the customer's name. The long turn-around time and error-prone documents have cost Greener more than one sale in the past. Greener Financial would like to have a quick, simple, and reliable method for compiling a customized proposal that compiles the correct policy kit and investment information for the customer, as well as a customized PowerPoint presentation that highlights the package content—and they want to automate compliance.



View the Greener Financial proposal.

## Greener Financial proposal

### Greener Financial Proposal Selection Page

**Advisor Name:** Chris Aaron  
**Presentation Date:** July 29, 2008  
**Prospect/Client Name:** Jan Simpson  
**Month End for Reports:** 12312007   
**Include Org Overview:** ☒

#### Please Select your Content

##### Select Kit

- ☒ Kit A  
☐ Kit B  
☐ Kit C

##### Product Selection

- ☐ Corporate Retirement Plans  
☐ Total Retirement Outsourcing  
☒ Investment Only

##### Investment Information

- ☒ Our Investment Philosophy  
☐ Investment Choices  
☐ Target Date Funds  
☒ Morningstar Ratings

##### Additional Options

- ☐ Sponsor Resources  
☒ ERISA Services  
☒ Participant Communications  
☒ Participant Tools and Services

#### Please Select your Fulfillment Criteria

##### Outputs

- ☒ PDF  
☐ POWERPOINT



If this were a typical proposal, how would you address the following needs? What additional processes or documents might you need to involve? What challenges might you face?

1. If you wanted to customize the proposal with the customer's personal information?
2. If you wanted to add supplementary documents to the proposal?
3. If you wanted to present two different document types to the customer (e.g., printed copy and presentation)?



Open and explore the Greener Financial proposal.

1. Open the `C:\152 Dialogue Live Fundamentals\Output Files` folder.
2. Open `Greener_Proposal.dlf`.
3. Explore the DLF.

You may notice that the initial page of the DLF has a different appearance than a DLF used as correspondence. Instead of content or images, the DLF has radio buttons and check boxes you can select and a **Submit** button. Despite its simple appearance, this DLF has some powerful capabilities behind it:

- ♦ Changing the input information at the top of the page customizes the compiled document.
- ♦ Selecting or clearing the radio buttons and check boxes on the interview page automatically includes or excludes pages in the compiled document.
- ♦ Clicking **Submit** creates an XML file with the data that will be used to create a customized proposal document and/or a customized proposal during fulfillment.

The page you're looking at is a special kind of page used in Live Editor called an interview page. Interview pages let end users compile document packages from one location through an easy-to-use list of selections. This can be completed online or offline, which provides flexibility for different work situations. The resulting documents are professionally formatted and customized, without the need to engage in the "pick and pack" process normally associated with proposals.

## Interview pages and documents

Interview pages are non-printing pages that use a question-and-answer format to make it easier for you to edit DLFs. For example, a DLF can have an interview page that automatically adds paragraphs to the document based on the selections. You can make selections on an interview pages using any combination of the following controls:

- ◆ Button
- ◆ Calendar Picker
- ◆ Check box
- ◆ Drop-down list
- ◆ Radio button

Document designers can design a DLF to include an interview page for each customer, an interview document for all customers, or a combination. Having an interview page for each customer is useful in on-demand situations when you have a need to customize a document based on a particular customer's information. Having an interview document is useful when you have a need to update data that has a single value across a set of customers.



Open and complete the Greener Financial proposal interview page in Live Editor.

1. If it is not already selected, select the **Kit A** radio button.
2. If it is not already selected, select **View -> Outline Viewer**.
3. In the Outline Viewer panel, expand **Kit A** and click through the pages to see what is available.
4. On the interview page, from the **Advisor Name** drop-down list, select **Chris Aaron**.
5. Next to **Presentation Date**, use the Calendar Picker to change the date to one week from today.
6. In the **Prospect/Client Name** field, enter **Jan Simpson**.
7. In the Outline Viewer panel, click the following pages to see how the customized information changed:
  - **Pitch Title Page**
  - **About Your Sales Representative Page**
8. In the **Please Select Your Content** section, make several selections and note the changes to the document in the Outline viewer.
9. Click **About Our Company Page**.
10. Click the **Line** radio button to change the chart type.
11. In the **Please Select Your Fulfillment Criteria** section, select one or both output types.
12. Click **Submit**.

You can see how Dialogue Live allows you to use an interview page, along with interactive features, to customize individual pages in the document.

## Automated fulfillment

Fulfillment for proposals often involves a lot of manual efforts to customize proposals for customers and “pick and pack” the required supplemental documents. This manual work can create lag times for fulfillment processing and increase opportunities for error. Dialogue Live streamlines the proposal fulfillment process by solving these issues.



Fulfill the Greener Financial enrollment application in Design Manager.

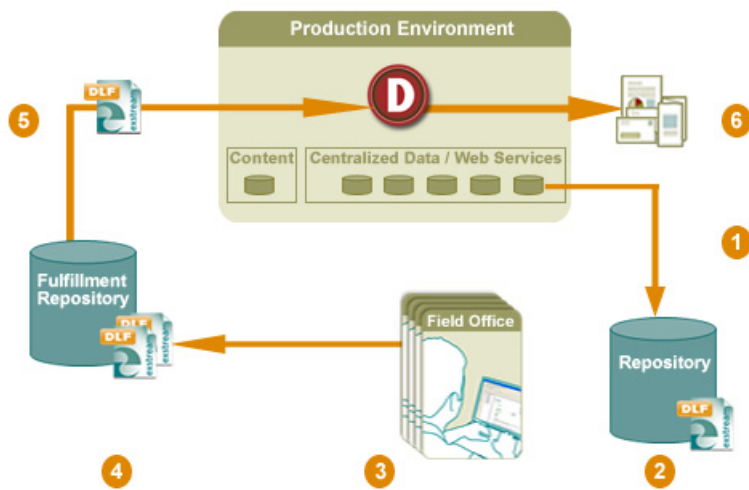
1. Open the `C:\152 Dialogue Live Fundamentals\Fulfillment Files` folder.
2. Open `Greener_Proposal.cmd`.
3. When prompted, press any key.
4. Open the `C:\152 Dialogue Live Fundamentals\Output Files` folder.
5. Open `Edited_PDF_Proposal.pdf` or `Edited_PPT_Proposal.ppt`.
6. Review the fulfillment document.

The Greener Financial proposal application uses the data saved in `Edited_Proposal.xml` to drive the fulfillment process and customize the proposal document based on the customer’s personal information and required supplemental information. With this solution in place, representatives can spend less time on customizing documents and more time on selling funds. Additionally, customers receive professional, accurate, compliant, and customized documents much more quickly.

## Proposals workflow

Using DLFs in the proposals workflow can provide enterprises with a streamlined delivery channel that facilitates a quick turn-around on customized documents. Dialogue Live can allow you to reduce all the manual “pick and pack” work associated with proposals to a few simple clicks, greatly reducing response time. Additionally, the enrollments workflow can tie directly into the enrollment and correspondence workflows.

## Dialogue Live proposal workflow



Dialogue Live simplifies the proposal workflow:

1. The document designer creates a DLF and places it in a common repository.
2. The end user accesses the repository and opens the appropriate DLF.
3. The end user edits the DLF using Live Editor.
4. The end user submits the DLF for processing.
5. Dialogue retrieves the DLF and processes it.
6. The final documents are sent to the customers via an automated process.



How does this workflow compare to your current workflow for proposals?

## Summary



Using the proposal example in this module, discuss which features in Dialogue Live address or solve the problems identified below. How can you apply these features to your own documents?

1. Proposal documents have no pre-fill or automated personalization.
2. The document package and contents version are determined by an individual representative.

3. Representatives have little or no guidance during the “pick and pack” process.
4. The document selection process is typically ad hoc.
5. Proposal documents are prone to incorrect, inconsistent, or outdated information because they depend on content from many departments.
6. Customers become confused or dissatisfied when they receive the wrong documents or documents that are not customized to their needs.





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# Module 4: Dialogue Live architecture and interface

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Dialogue Live provides enterprises with a controlled, flexible, and intelligent document editing environment—one that is centrally designed, shareable and customizable across multiple groups, and integrated with relevant customer data sources. With Dialogue Live, enterprises can retain control of their documents, yet allow flexibility for the personnel who interact with customers, such as marketing, sales, and customer service representatives.

In this module, you will take a closer look at Dialogue Live integration within the Dialogue architecture. You will also gain an understanding of how the internal components of a Dialogue Live Format (DLF) document redefine portability. Finally, there will be a chance to explore the Dialogue Live interface, including how it can be customized for end users.

## Objectives

After you complete this module, you should be able to:

- ◆ Discuss the basic architecture of Dialogue Live.
- ◆ Examine the internal components of a DLF.
- ◆ Identify features on the Live Editor interface.

## Terms

Important terms used in this module include:

- ◆ **DLF**—Dialogue Live Format
- ◆ **eDriver**—An output driver module specifically designed for electronic delivery
- ◆ **Manifest**—An Extensible Markup Language (XML) file stored in a DLF that contains a list of the objects used in the DLF and their properties
- ◆ **Metadata**—The information about a document and its contents that is stored with the document for identification, search, and archival use
- ◆ **Module**—An optional component of a software suite that adds additional functions

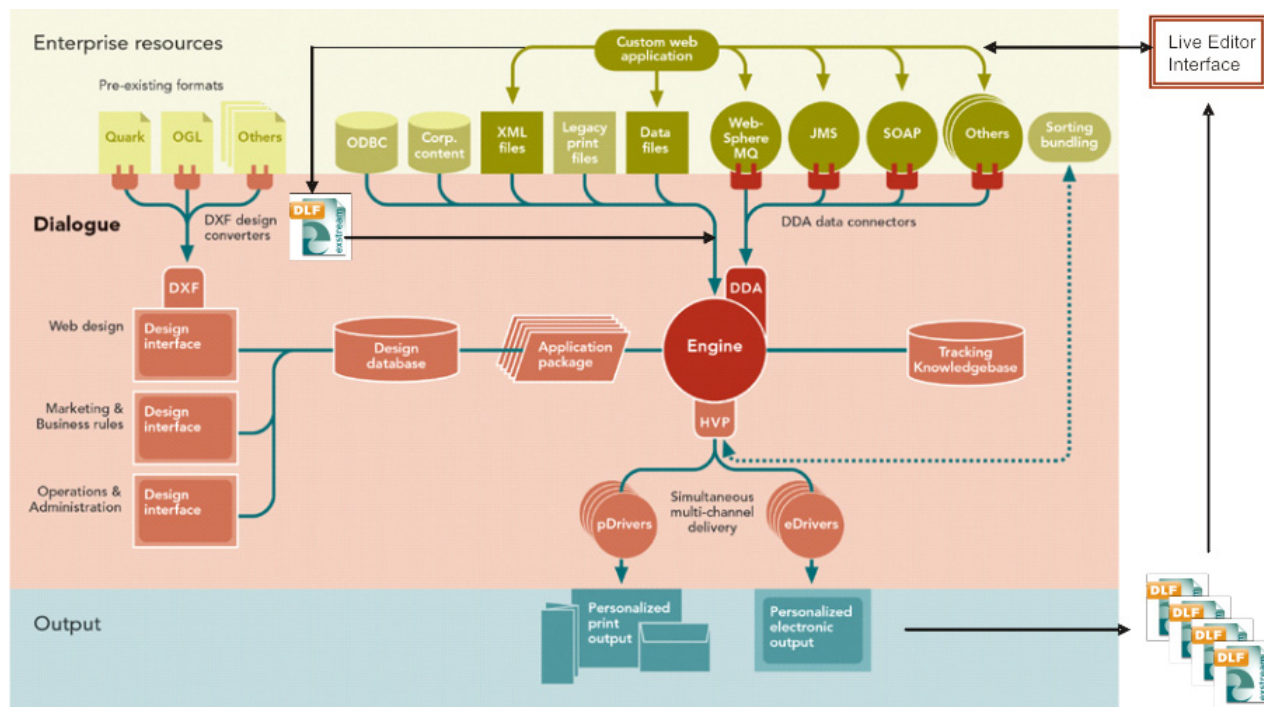
## Dialogue Live architecture

Distributed document creation is generally problematic because documents created in a word processing program cannot be integrated into an automatic production system. Dialogue Live, however, is integrated with Dialogue, which provides the following benefits:

- ◆ Simplifies the process for finding and using the most up-to-date document templates.
- ◆ Leverages real-time customer variable data to embed, retrieve, or pre-fill a DLF with pre-approved content.
- ◆ Speeds the review and approval process with interactive controls and automated revision tracking tools.
- ◆ Reduces mail processing time and postage costs with automatic fulfillment.
- ◆ Automates records and archive management processes.
- ◆ Automates the update of customer data for corporate systems.
- ◆ Automatically triggers events, such as the creation of a new document.

Dialogue Live allows you to extend the capabilities of Dialogue by producing Dialogue Live Format (DLF) output and by defining the interactive environment in which the DLF resides. Applications that produce DLFs are similar in structure to applications that produce other types of output.

### Dialogue Live architecture



You use Design Manager to create, define, and manage all of the objects contained in the application; define the environment settings; and produce DLF output. You use Designer to design the layout and functionality of the DLF, including controlled areas, interactive features, and custom functions. After the DLF is created and stored in a repository, the end users use Live Viewer or Live Editor to view and edit the document. The major benefit to this architecture is that DLFs can be distributed, edited, and updated by users who do not have access to the Dialogue platform.

## Dialogue Live environments

Editing a DLF should not be confused with designing the document in Designer, such as adding text boxes and programming variables. A DLF is the finished product awaiting only the personalization content. For example, editing a DLF might require an end user to change a customer address, add a date, or omit information not applicable to the customer, before submitting the document to a repository for fulfilment.

Dialogue Live has three environments available to view and edit a DLF:

- ◆ Live Viewer
- ◆ Live Editor
- ◆ Web Browser

### DIALOGUE LIVE ENVIRONMENTS AT A GLANCE

ENVIRONMENT	USES	LIMITATIONS
Live Viewer	<ul style="list-style-type: none"> <li>• View a DLF.</li> <li>• Print a DLF.</li> </ul>	<ul style="list-style-type: none"> <li>• The design and layout of the DLF cannot be modified in Live Viewer.</li> <li>• Live areas are read-only.</li> </ul>
Live Editor	<ul style="list-style-type: none"> <li>• View a DLF.</li> <li>• Edit a DLF using all available environmental features, including toolbars and Live Actions.</li> <li>• Save a DLF.</li> <li>• Print a DLF.</li> </ul>	<ul style="list-style-type: none"> <li>• The design and layout of the DLF cannot be modified in Live Editor unless the document designer allows it; permissions are set on each object.</li> <li>• Live areas are editable, based on permissions set during design.</li> </ul>
Web Browser	<ul style="list-style-type: none"> <li>• Same as Live Editor, though some menu options may differ.</li> </ul>	<ul style="list-style-type: none"> <li>• Same as Live Editor.</li> <li>• Requires installation of Live Editor.</li> <li>• Requires Internet Explorer.</li> </ul>

## Live Viewer

Live Viewer, which is available as a free download, lets you to view and print a read-only version of a DLF.

## Live Editor

Live Editor, available only through a software licensing agreement, lets you interact with and edit a DLF within a WYSIWYG (What You See Is What You Get) environment and preview the final document before sending it to the customer.

Unlike Dialogue Designer, you do not need to run the Dialogue Engine to view the DLF in its completed state because Live Editor includes a subset of the Dialogue Engine. This means the agents and customers who are working with your DLFs do not need to have Dialogue installed to complete their documents.

Each DLF can have unique end user permissions, formatting, and controls that are also enforced by the DLF itself. This approach lets your enterprise deploy documents rapidly while maintaining control of the editing experience.

## Web Browser

If you have Live Editor installed, you can open DLFs in a Web browser. This environment lets you use the Web browser's features, such as bookmarks, in conjunction with the functionality of the DLF.

## Dialogue Live modules

Dialogue Live consists of two required and two optional modules:

### DIALOGUE LIVE MODULES

REQUIRED MODULES	OPTIONAL MODULES
Live Design	DLF Fulfillment
DLF eDriver	DLF Input

### Live Design module

The Live Design module is required for designing DLFs by extending the functionality of Design Manager and Designer. In Design Manager, the Live Design module extends the properties of design objects used in the Library and provides new settings and features unique to DLFs, including:

- ◆ Themes
- ◆ Custom user and systems events
- ◆ Access control

In Designer, the Live Design module allows you to add interactive functions, such as editing controls, to a document.

DLFs can be designed as stand-alone applications or for inclusion in Web-based or other types of interactive application frameworks. Unlike traditional interactive applications, however, you do not need to be connected to the Internet for a DLF to be interactive.

### DLF eDriver module

The DLF eDriver module is required for producing DLFs. With the DLF eDriver module, the Dialogue Engine can generate DLFs concurrently with other types of document output, or on demand using the Dialogue Real-time module. Additionally, DLFs can be used as input to Dialogue, when used in conjunction with the DLF Input module.

Based on XML standards, DLFs embody the interactive application framework for accessing and feeding external systems. Through DLFs, you can:

- ◆ Interface with workflow systems.
- ◆ Control presentation.
- ◆ Provide user and content authentication.
- ◆ Create an interactive document that contains data and content.

## DLF Fulfillment module

The DLF Fulfillment module is an optional module that allows you to use a DLF as a template. With the DLF Fulfillment module, you can edit a DLF to determine the content and format, and then replace a package file with the DLF in a high-volume production run.

When used as a template, DLFs can support applications for documents that need to be edited before printing, such as:

- ◆ Direct mail offerings
- ◆ Sales brochures
- ◆ Form letters for distribution

One common way to use the DLF Fulfillment module is to allow end users to upload and store a distribution list with an edited DLF. When the DLF is reintroduced to the Dialogue Engine as a template, the Engine populates the variables and triggers the rules in the DLF during the production run, and Dialogue completes fulfillment processing by producing individual documents for each customer in the distribution list.

## DLF Input module

The DLF Input module is an optional module that allows you to use DLFs as an input to the Dialogue Engine to trigger other activities in Dialogue. With the DLF Input module, the Dialogue Engine reads a DLF as a data file—to drive data or content extraction, trigger events, or create other documents—or as content to be included in another document.

When used as input, DLFs can:

- ◆ Update your external systems.
- ◆ Serve as templates for your high-volume runs.
- ◆ Be fulfilled in an alternative output format, such as AFP or PDF.
- ◆ Drive the fulfillment of a new document or set of documents.

The DLF Input module is useful if your enterprise process requires an application that reintroduces a document to the Dialogue Engine after it is edited in Live Editor. You can also use the DLF Input module to streamline document processing. For example, if you have a DLF form that new customers fill out to register for services, you could use the DLF Input module to extract the customer data from the DLF, and then use the data to produce a customized confirmation letter that is mailed to the customer.

## The Live Editor interface

The following sections identify the features available in the Live Editor interface.

## Menu bar

The Menu bar in Live Viewer and Live Editor provide end users with options for editing DLFs. The following menus are available on the Menu bar:

- ♦ **File**—Open, save, or print a DLF.
- ♦ **Edit**—Perform general editing tasks such as cutting, copying, and pasting text.
- ♦ **View**—Show or hide available panels and toolbars.
- ♦ **Format**—Perform general text formatting tasks such as setting the font and paragraph format, alignment, and spacing.
- ♦ **Live**—Use the special interactive features available in the DLF.
- ♦ **Table**—Perform general tables editing tasks such as adding or deleting rows and columns.
- ♦ **Tools**—Set the document options or use built-in tools such as revision tracking.
- ♦ **Window**—Change the design window display within Live Viewer or Live Editor.
- ♦ **Help**—Access software information and documentation.






Many commands have corresponding toolbar buttons and keyboard shortcuts that let end users accomplish the same task. If a command or menu is disabled in the view settings, the corresponding toolbar buttons and keyboard shortcuts are also disabled.

Document designers can create custom menu commands for a particular DLF. For example, a DLF can have a custom menu command that opens an email program, so an end user in your customer service organization can send an email to the approving supervisor. Custom menu commands for each DLF are located at the bottom of the **Live** menu.



## Toolbars

The toolbars in Live Viewer and Live Editor provide end users with buttons and drop-down lists for editing and interacting with DLF. The following toolbars are available:

### LIVE VIEWER AND LIVE EDITOR TOOLBARS

TOOLBAR	WHAT IT DOES	WHAT IT LOOKS LIKE
Standard	Perform general tasks in a DLF such as saving, printing, and finding and replacing text.	
Formatting	Format editable text or add a style sheet to the DLF.	
Live Actions	Find and view Live areas or perform custom actions specific to a DLF.	
Navigation	Browse the DLF by customer, document, or page.	
Position	Change the placement of graphic objects in the DLF.	

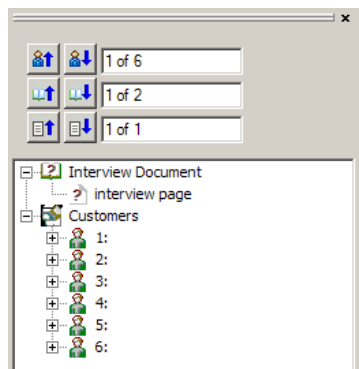
## LIVE VIEWER AND LIVE EDITOR TOOLBARS

TOOLBAR	WHAT IT DOES	WHAT IT LOOKS LIKE
Properties	Change the frame properties of editable objects in the DLF.	
Review	Use revision tracking and review tools.	

## Outline Viewer panel

The Outline Viewer panel displays a hierarchy that you can use to navigate through customers, documents, and pages. Each customer heading contains one or more documents, and each document heading contains one or more pages.

### Outline Viewer panel



The DataSheet panel lets you make a number of selections for a document from a single panel, rather than by having to scroll through the document to make the selection. Changing the data in the DataSheet panel updates the data in the appropriate editable areas on the DLF.

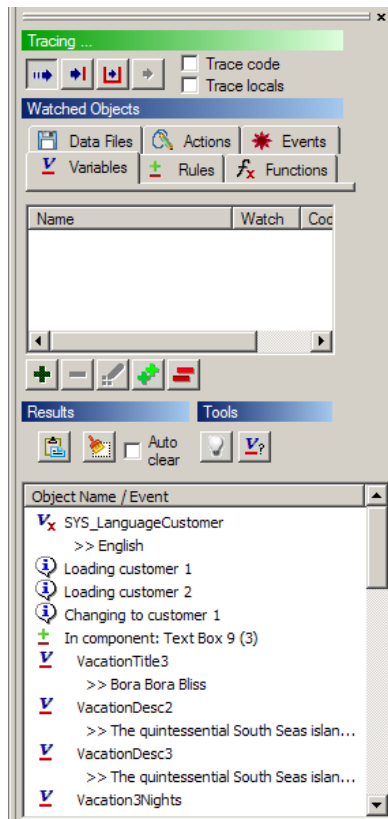
DataSheet	
Fund_Name1	Capital World Growth and Income Fund
SSN	123-45-6789
Fund_Category1	Growth-and-income funds
Transaction_Month	May
Transaction_Day	14th
Transaction_Frequency	Every month
ChangeAddress	F
Fund_Category2	Balanced funds
Fund_Category3	Money market funds
Fund_Category4	Equity-income funds
Fund_Name2	ACME Balanced Fund
Fund_Name3	The Tax-Exempt Money Fund of America
Fund_Name4	<a href="#">The U.S. Treasury Money Fund of America</a>
Fund_Purchase1_Amount	\$5,000.00
Fund_Purchase2_Amount	\$10,000.00
Fund_Purchase3_Amount	\$1,200.00
Fund_Purchase4_Amount	\$3,000.00
Fund_Name_Key	<a href="#">The U.S. Treasury Money Fund of America</a>
Fund_Russel1000_Name	Russell 1000 Value Index* (Benchmark)
Fund_Range	
Fund_Values	
Fund_Russel1000	
Funds_Display1	
SYS_DateCurrent	5/30/2008



## Debugger panel

The Debugger panel lets you view and test the logic in a DLF. For example, an image updates based on a variable that specifies the customer location. You can use the debugger to ensure logic in the interactive document performs as it is designed to work.

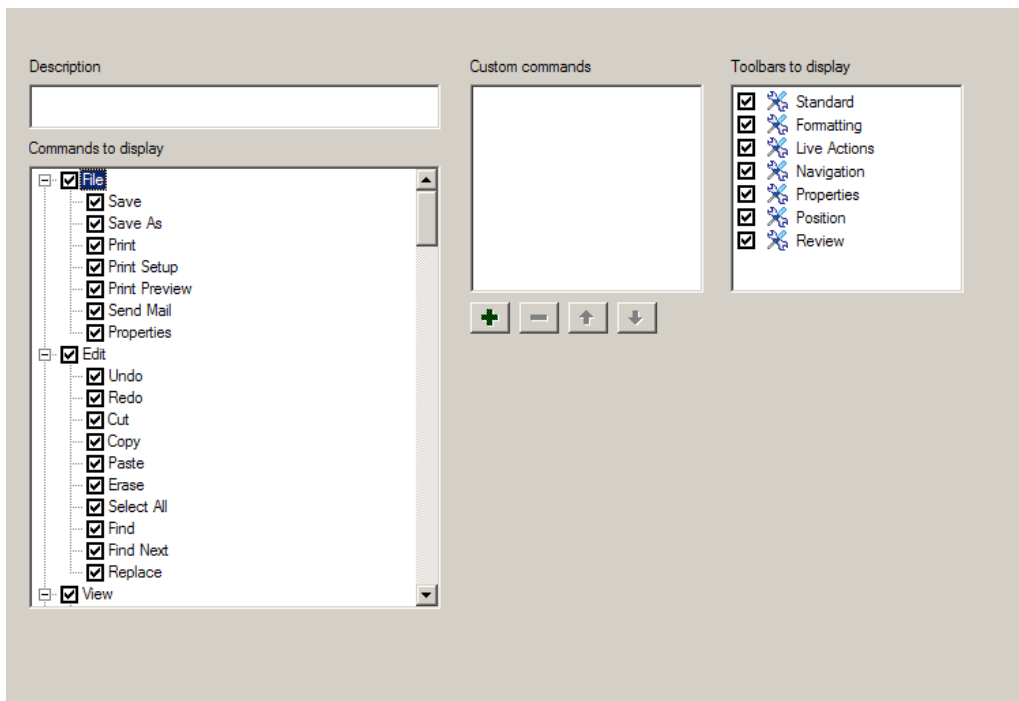
### Debugger panel



## Customizing the Live environment

Document designers can fully customize the environment controls available in the Live Viewer and Live Editor. Within the Library in Design Manager, expand **Environment** -> **Live** -> **Views** to add, modify, or delete the views used in DLF environment. These views allow your enterprise to define the Live Viewer and Live Editor experience, such as which specific or custom menus, commands, and toolbars are available.

## Property Panel, Views



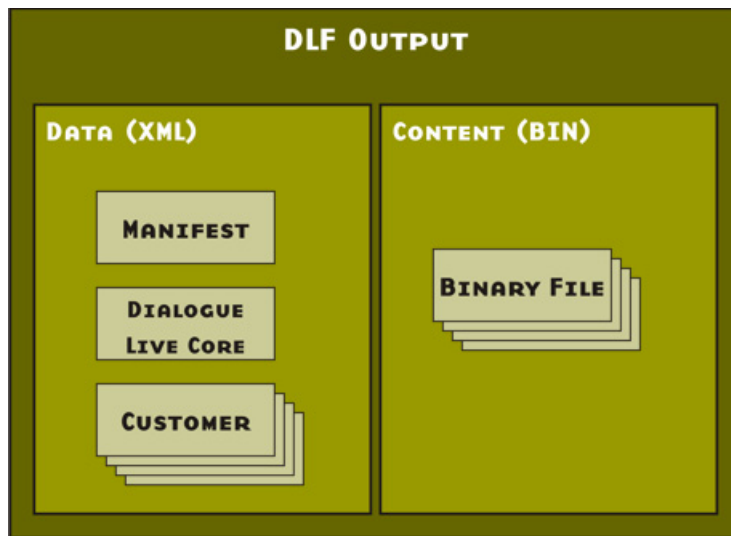
## Inside the DLF file

DLF is a file format that can store a combination of XML and non-XML files together in a single compressed file container. This format has two key advantages: the independent files embedded in the document remain intact, and the resulting file sizes are much smaller compared to traditional XML files.

A DLF has configurable and customizable XML areas that are open for integration. The information supported within these open XML areas is not limited to data, but can include content and information not visible on the document itself (i.e., metadata). DLF supports read, write, and insert using non-proprietary Application Platform Interfaces (APIs).

Much of the versatility of the DLF is found in its usage of XML. The DLF format is like a non-proprietary ZIP archive file that uses a file structure to organize and store the data and contents. Within these folders, the data and content are separated into XML and binary (BIN) files, respectively. The XML files store a wealth of usable data and metadata about the DLF and customers. The BIN files contain the design objects.

## Data and content storage in a DLF



The basic file structure remains the same for every DLF, which makes it easy to parse and manipulate the XML data with third-party software, or to organize and search your DLF repository. DLFs can be routed through any number of systems or workflow tools, and can be integrated with other systems easily because of the XML structure.



Direct manipulation of the BIN or XML files within a DLF can adversely affect the appearance of the DLF or corrupt the application database.

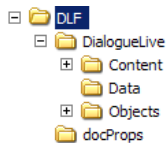
You can view the DLF folder structure from a number of standard archival tools, including WinZip. Examining the contents will help you understand how even the internal structure of a DLF can be utilized for purposes outside of Dialogue, such as harvesting the data from a content management system. The structure of DLF extends Dialogue Live's usefulness beyond that of a simple document editing system.



Examine the contents of **Travel\_Mailer.dlf**.

1. Open the **C:\152 Dialogue Live Fundamentals\Output Files** folder.
2. Right-click **Travel\_Mailer.dlf** and select **Open With -> WinZip**.  
WinZip opens and shows a list of files compressed in the DLF.
3. Click **Extract**.  
A dialog box opens for you to select an extraction location.
4. Click **Desktop**.
5. In the **Extract to** box, add **\Travel** to the end of the file path.
6. Click **Extract**.  
WinZip extracts the files to the **Travel** folder on your desktop.
7. On the desktop, right-click the **Travel** folder and select **Explore**.
8. Explore the folder structure of the DLF.

### Folder structure for a DLF



The folders within the DLF each have a specific purpose:

- ♦ **DialogueLive**—Contains the folders in which the data, content, and objects that make up the DLF reside.
  - **Content**—Contains the binary files that define the composed pages and information about the structure and properties of the DLF.
  - **Data**—Contains the variable customer data, stored in one XML file per customer.
  - **Objects**—Contains the design objects used by the DLF, such as images and fonts. This folder contains multiple sub-folders that are named for the corresponding type of object they contain. Each sub-folder can contain one or many BIN files, named by a number.
- ♦ **docProps**—Contains the metadata of the DLF.

## DLF structure and properties

The **DialogueLive** -> **Content** folder contains the **Manifest.xml** file, a file that describes the structure and properties of the DLF. Each DLF has a unique manifest, which can be used to determine the properties of a DLF without opening the file in Live Editor or Designer. Because it is in XML format, you can use the manifest to harvest information about the DLF. For example, you can use this file to search for documents that were sent to an individual customer using the XML tag **<CustomerName>**.

### Sample Manifest.xml file

```
<?xml version="1.0" encoding="ISO-8859-1"?>
<DialogueLiveManifest xmlns="http://www.exstream.com/2007/01/dlf/manifest">
  <Customers>
    <Customer name="1:" ordinal="1">
      <Documents>
        <Document oi="4" version="2" name="Letter Doc" ordinal="1">
          <NumIncludes value="1" />
          <IsDeletedByRule value="False" />
          <IsHiddenByUser value="False" />
          <Pages>
            <Page oi="12" version="2" name="Live Letter" ordinal="1" pageuse="0">
              <NumIncludes value="1" />
              <HasLiveArea value="True" />
              <HasUpdateAreas value="True" />
              <IsDeletedByRule value="False" />
              <IsHiddenByUser value="False" />
              <IsInterviewPage value="False" />
            </Page>
            <Page oi="27" version="2" name="Additional Information" ordinal="2" pageuse="0">
              <NumIncludes value="0" />
              <UsageRule oi="124" />
              <HasLiveArea value="True" />
              <HasUpdateAreas value="True" />
              <IsDeletedByRule value="True" />
              <IsHiddenByUser value="False" />
              <IsInterviewPage value="False" />
            </Page>
          </Pages>
        </Document>
      </Documents>
    </Customer>
```

## DLF metadata

The `docProps` folder contains the `DialogueCore.xml` file, a file that stores metadata about the DLF (in XML format). Each DLF has one of these files, which contains usable data about the DLF and the system on which it was created:

- ♦ Application name
- ♦ Engine version
- ♦ Creation information
- ♦ Last revision information

You can use this metadata for archiving and retrieval purposes.

### Sample DialogueLiveCore.xml file

```
<DialogueLiveProperties xmlns="http://www.exstream.com/2007/01/dlf/core">
<SYSLD_ApplicationName>Letter DLF App</SYSLD_ApplicationName>
<SYSLD_OutputName>DLF Letter Queue</SYSLD_OutputName>
<SYSLD_PackageFile>C:\Pub Files\Mailer.pub</SYSLD_PackageFile>
<SYSLD_PackageVersion>610009</SYSLD_PackageVersion>
<SYSLD_EngineVersion>610009</SYSLD_EngineVersion>
<SYSLD_RevisionNumber>1</SYSLD_RevisionNumber>
<SYSLD_CreatedBy>user</SYSLD_CreatedBy>
<SYSLD_CreationDateTime>2008-05-17T11:06:56</SYSLD_CreationDateTime>
<SYSLD_FileName>DLF.dlf</SYSLD_FileName>
<SYSLD_FileNameWithPath>C:\DLFs\DLF.dlf</SYSLD_FileNameWithPath>
<SYSLD_DocumentType>0</SYSLD_DocumentType>
<RevisionHistory>
<SYSLD_Rev_Number>1</SYSLD_Rev_Number>
<SYSLD_Rev_By>user</SYSLD_Rev_By>
<SYSLD_Rev_DateTime>2008-06-25T16:41:28</SYSLD_Rev_DateTime>
<SYSLD_Rev_Note></SYSLD_Rev_Note>
</RevisionHistory>
</DialogueLiveProperties>
```

## Additional information

For more information on designing and editing DLFs, see the following documents:

- ♦ *Interactive Documents* guide
- ♦ *DLF Output* guide
- ♦ *Design Objects* guide
- ♦ *Dialogue Live Editor Help*

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# Additional exercises

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## Add Live areas to a page

In many document processing scenarios, users need to rely on a variety of software solutions to create a document that suits their needs. For example, an enterprise may use word processing and spreadsheet software to design print documents, but also use a Web-oriented solution to design electronic copies of the same or similar documents. Having two solutions creates dependencies and coordination problems, and also requires additional development expense.

Dialogue Live streamlines document design to a single solution—Dialogue.



Add Live areas to an existing Dialogue page.

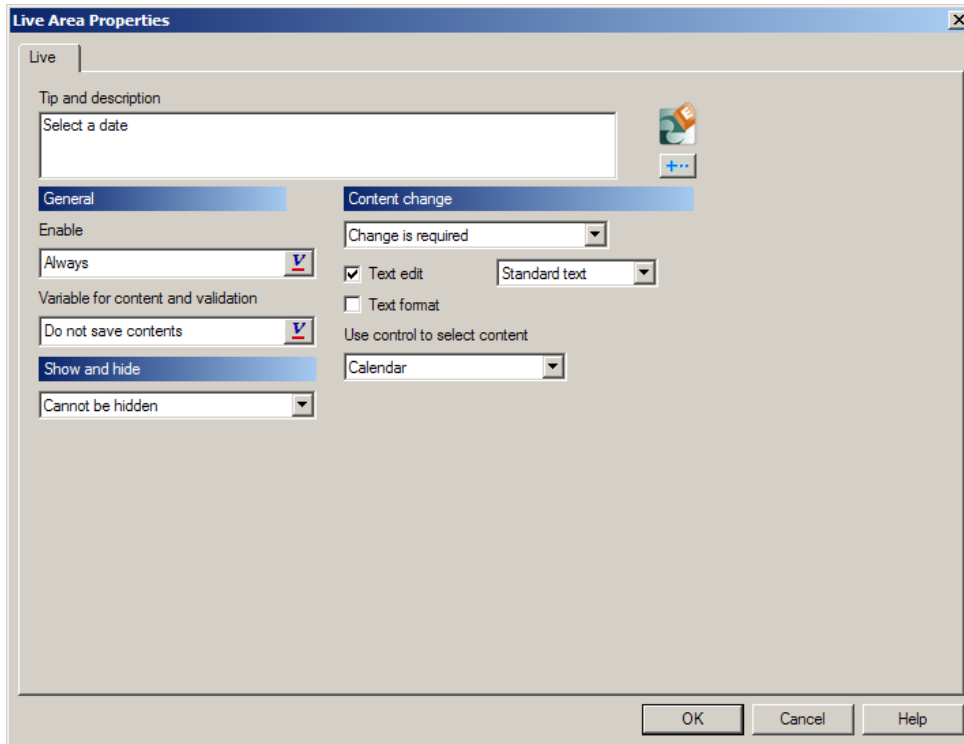
## Open the page

1. Open Dialogue Design Manager.
2. In the Library, expand **Dialogue Live** -> **Atlas** -> **Pages**.
3. Drag the **Atlas Letter for Editing** page to the Edit Panel.  
The page opens in Designer.

## Add a Calendar Picker

1. Highlight the text **Enter Date**.
2. Right-click and select **Add Live area**.  
The **Live Area Properties** dialog box opens.

### Live Area Properties dialog box



3. In the **Tip and description** box, enter **Select a date**.
4. From the **Content change** drop-down list, select **Change is required**.
5. Select the **Text edit** check box.
6. From the **Use control to select content** drop-down list, select **Calendar**.
7. Click **OK**.

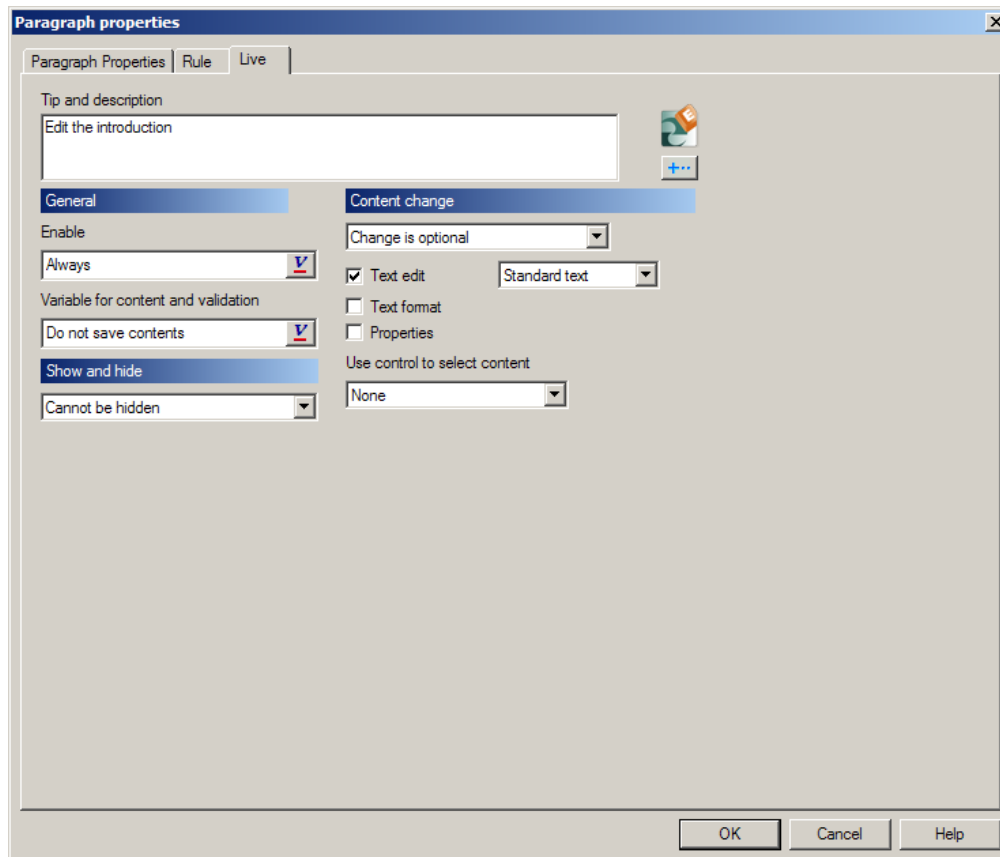



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## Add an editable paragraph

1. Highlight all the text in the first paragraph.
2. Right-click and select **Paragraph properties**.  
The **Paragraph properties** dialog box opens.
3. Click the **Live** tab.

### Paragraph properties dialog box, Live tab



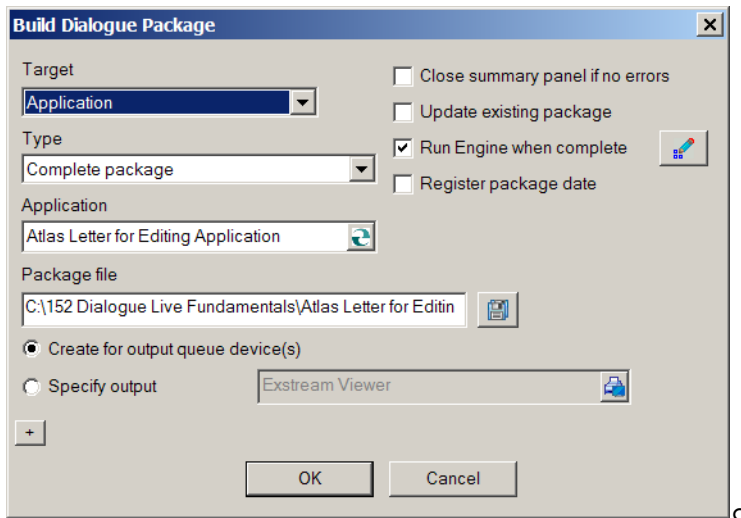
4. In the **Tip and description** box, enter **Edit the introduction**.
5. From the **Content change** drop-down list, select **Change is optional**.
6. Select the **Text edit** check box.
7. Make sure **Standard text** is selected.
8. Click **OK**.
9. Click .
10. Close Designer.

## Package the application

Before you can view your DLF in Live Editor, you must package the application as you would any other Dialogue application.

1. In Design Manager, expand **Dialogue Live** -> **Atlas** -> **Applications**.
2. Right-click **Atlas Letter for Editing Application** and select **Package Application**.  
The **Build Dialogue Package** dialog box opens.

### Build Dialogue Package dialog box



3. Click **OK**.  
The Dialogue Engine runs and packages the application.

## View the DLF in Live Editor

1. Navigate to the `C:\152 Dialogue Live Fundamentals\Output Files` folder.
2. Open `AtlasLetter_OnDemand_for Editing.dlf`.
3. Review the DLF.