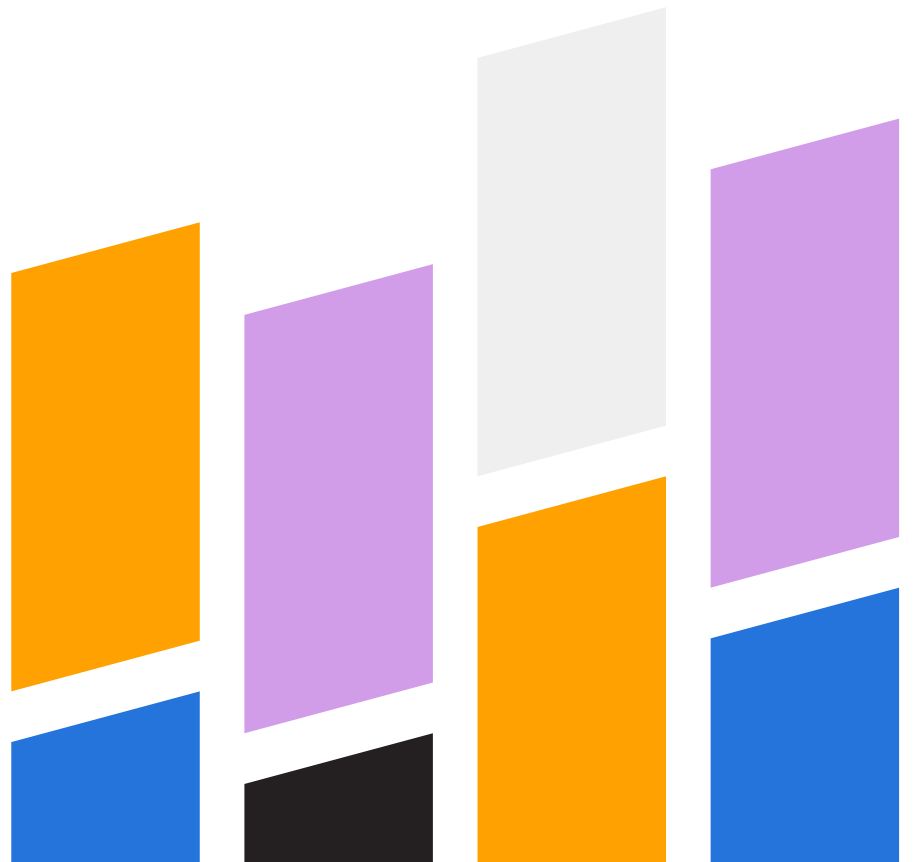




Objectif Lune Technical Training

Course Catalog

November 2025



Objectif Lune Technical Training Course Catalog

Upland offers a variety of courses to help you build the knowledge and skills you and your team need to use Objectif Lune software and maximize its performance. Whether you are just getting up and running with OL Connect or would like to refresh your skills, you can choose courses that are best for you and your organization.

Our instructor-led virtual courses are a great opportunity and value for team learning, while self-paced online courses are available for those who prefer to work independently. Check back throughout the year, as we are always adding new course topics to our library.

Two types of delivery methods for training courses

Virtual Instructor-Led Training (VILT)

- Trainer shares screen to demonstrate features
- Participants complete hands-on activities and have live access to the trainer during sessions
- Recordings of each session are provided for future reference

Online Guided Learning (OGL)

- Self-guided 24x7 access to video and text-based learning modules to demonstrate features
- Participants complete hands-on activities and have email access to the trainer throughout the four-week access period
- Downloadable handbook provided for future reference

Objectif Lune Technical Training

Course Summary

Course	Delivery Type	Duration
OL Connect Professional and Enterprise		
OL Connect Foundations	VILT per company	32 hours (usually eight four-hour sessions) for up to five people
	VILT per person	Eight four-hour sessions delivered once per quarter
Getting Started with OL Connect Designer	VILT per company	Four four-hour sessions for up to five people
	OGL	Available 24x7 for four weeks
Getting Started with OL Connect DataMapper OGL course expected in Q3 2026	VILT per company	Two four-hour sessions for up to five people
	OGL	Available 24x7 for four weeks
Getting Started with OL Connect Workflow	VILT per company	Two four-hour sessions for up to five people
Getting Started with OL Connect Automate OGL course expected in March 2026	VILT per company	Two four-hour sessions for up to five people
	OGL	Available 24x7 for four weeks
OL Connect Desktop		
OL Connect Desktop Design Template	VILT per company	Two four-hour sessions for up to five people

VILT: Virtual Instructor-Led Training

OGL: Online Guided Learning

OL Connect Professional and Enterprise

Getting Started with OL Connect Designer

This course is your introduction to designing personalized, data-driven documents and generating multi-channel output using OL Connect Designer. By the end of the course, you will be able to:

- Design documents for both print and email
- Create and format multi-channel templates
- Personalize content and re-engineer existing documents

Audience

New OL Connect Designers

Participants should possess strong computer and analytical skills, as well as a basic understanding of expressions and conditional logic.

Delivery Options

Virtual Instructor-Led Training (VILT)

- **Format:** Private instructor-led course delivered to up to five people in virtual sessions. Guided demonstrations to complete hands-on activities.
- **Duration:** Four four-hour sessions
- **Benefits:** Real-time interaction and dedicated timing

Online Guided Learning (OGL)

- **Format:** A collection of short videos and text-based explanations with instructions to complete hands-on activities. Email access to an instructor for questions and feedback on activities.
- **Access:** 24/7 access for four weeks
- **Benefits:** Flexible learning at your own pace

Getting Started with OL Connect DataMapper

This course provides an introduction to DataMapper's user interface, powerful data mapping wizards, and versatile configurations for both promotional and transactional use. By the end of the course, you will be able to:

- Proficiently use DataMapping wizards including CSV, database, XML, and JSON
- Import and export data models
- Configure data mappings from various formats including JSON, text, and PDF

Audience

New OL Connect technical users

Participants should possess strong computer and analytical skills, as well as a basic understanding of expressions and conditional logic.

Delivery Options

Virtual Instructor-Led Training (VILT)

- **Format:** Private instructor-led course delivered to up to five people in virtual sessions. Guided demonstrations to complete hands-on activities.
- **Duration:** Two four-hour sessions
- **Benefits:** Real-time interaction and dedicated timing

Online Guided Learning (OGL) **Expected in Q3 2026**

- **Format:** A collection of short videos and text-based explanations with instructions to complete hands-on activities. Email access to an instructor for questions and feedback on activities.
- **Access:** 24/7 access for four weeks
- **Benefits:** Flexible learning at your own pace

Getting Started with OL Connect Automate

This course provides a practical foundation for using OL Connect Automate to streamline and optimize document processes. You will learn to create, configure, and deploy automated flows that improve the efficiency and accuracy of document management. By the end of the course, you will be able to:

- Understand the core concepts and components of OL Connect Automate
- Create and manage basic automation flows
- Configure triggers and actions for automated document processing
- Generate multi-channel outputs as part of a complete document flow

Audience

New OL Connect technical users

Participants should possess strong computer and analytical skills, as well as a basic understanding of expressions and conditional logic.

Delivery Options

Virtual Instructor-Led Training (VILT)

- **Format:** Private instructor-led course delivered to up to five people in virtual sessions. Guided demonstrations to complete hands-on activities.
- **Duration:** Two four-hour sessions
- **Benefits:** Real-time interaction and dedicated timing

Online Guided Learning (OGL) **Expected in March 2026**

- **Format:** A collection of short videos and text-based explanations with instructions to complete hands-on activities. Email access to an instructor for questions and feedback on activities.
- **Access:** 24/7 access for four weeks
- **Benefits:** Flexible learning at your own pace

Getting Started with OL Connect Workflow

Help your company streamline its organizational processes by taking advantage of Workflow. This course focuses on the practical application of Workflow components and services. By the end of the course, you will be able to:

- Effectively use the Workflow interface
- Configure settings and create automated processes for various tasks, including printing, emailing, and data management
- Use the data repository manager

Audience

New OL Connect technical users

Participants should possess strong computer and analytical skills, as well as a basic understanding of expressions and conditional logic.

Delivery Options

Virtual Instructor-Led Training (VILT)

- **Format:** Private instructor-led course delivered to up to five people in virtual sessions. Guided demonstrations to complete hands-on activities.
- **Duration:** Two four-hour sessions
- **Benefits:** Real-time interaction and dedicated timing

OL Connect Foundations

OL Connect Foundations is a bundle of three Getting Started courses:

- Getting Started with OL Connect Designer
- Getting Started with OL Connect DataMapper
- Getting Started with OL Connect Automate

Note: *Getting Started with OL Connect Workflow* is available by request as an alternative to *Getting Started with OL Connect Automate*. It is only available via VILT per company.

This activity-based program is designed to help you master the creation, management, and automation of transactional and promotional documents.

Audience

This course is intended for technical users who need to be familiar with all parts of OL Connect.

Participants should possess strong computer skills and a basic understanding of conditional logic.

Delivery Options

*Virtual Instructor-Led Training (VILT) **per company***

- **Format:** Live, remote sessions with an instructor delivered to up to five participants from one company. Guided demonstrations to complete hands-on activities.
- **Duration:** Eight four-hour sessions scheduled to suit company's availability
- **Benefits:** Real-time interaction and dedicated timing

*Virtual Instructor-Led Training (VILT) **per person***

- **Format:** Live, remote sessions with an instructor delivered to participants from multiple companies. Guided demonstrations to complete hands-on activities.
- **Duration:** Eight four-hour sessions
Course is available once a quarter. Ask to see the upcoming schedule.
- **Benefits:** Real-time interaction and dedicated timing

OL Connect Desktop

OL Connect Desktop Design Template

In this course, you will focus on the creation, management, and automation of various document types. Through hands-on activities and real-world use cases, you will learn to design templates, personalize content, and configure print presets.

Audience

This course is designed for individuals who need to create variable data documents or who want a comprehensive understanding of OL Connect Desktop.

Participants should have a basic understanding of computers and printers, including basic logical test comprehension.

Delivery Options

Virtual Instructor-Led Training (VILT)

- **Format:** Private instructor-led course delivered to up to five people in virtual sessions. Guided demonstrations to complete hands-on activities.
- **Duration:** Two four-hour sessions
- **Benefits:** Real-time interaction and dedicated timing



Let's start learning.