



Objectif Lune Technical Training

Course Catalog

September 2026



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 designated 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
	OGL	Available 24x7 for 12 weeks
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	VILT per company	Two four-hour sessions for up to five people
	OGL	Available 24x7 for four weeks
Getting Started with OL Connect Automate	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
Custom Training	VILT per company	Training day(s) based on selected topics
OL Connect Desktop		
Getting Started with OL Connect Desktop	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 is your introduction to extracting and preparing data for personalized, data-driven communications using DataMapper. By the end of the course, you will be able to:

- Use Data Mapping wizards
- Map and transform data from a variety of sources including CSV, Databases, XML, JSON, Text, PDF, and more
- Work with a unified Data Model

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)

- **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 is your introduction to automating document processes using OL Connect Automate. 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 output 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)

- **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

This course is your introduction to using OL Connect Workflow to automate and streamline document processes. By the end of the course, you will be able to:

- Understand the core concepts and components of OL Connect Workflow
- Create and manage automated processes for tasks such as printing, emailing, and data management
- Configure triggers and actions to automate document processing
- Integrate data and document processes into complete automated processes

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

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 12 weeks
- **Benefits:** Flexible learning at your own pace

Custom Training

Custom Training provides a flexible, instructor-led learning experience tailored to your organization's specific needs. Training can be customized around the OL Connect modules and topics most relevant to your team, allowing you to focus on specific objectives, skills, and areas of interest.

Custom Training is purchased on a per-training-day basis and can cover topics across OL Connect Designer, DataMapper, Automate, and Workflow, including both getting started and advanced subjects. It can be tailored to your team's existing knowledge and objectives, making it an ideal option for creating a training experience that closely aligns with your organization's needs. Additionally, training days can be combined across topics to create a training plan that meets your specific requirements.

Depending on the topics selected, at the end of the training, you will be able to:

- Apply OL Connect features and functionality covered during the training to your specific business needs
- Configure and use the selected OL Connect modules and features effectively within your solutions
- Apply best practices and techniques related to the topics covered
- Use the knowledge and practical skills gained during the training in your real-world projects and use cases

Audience

OL Connect technical users

Participants should possess strong computer and analytical skills, as well as a basic understanding of expressions and conditional logic. The training can be tailored to participants' existing knowledge and experience.

Delivery Options

Virtual Instructor-Led Training (VILT)

- **Format:** Private instructor-led training delivered to up to five people in virtual sessions, with guided demonstrations and hands-on activities tailored to the selected topics
- **Duration:** Purchased by the training day; training days can be combined across selected topics
- **Benefits:** Real-time interaction and dedicated timing

OL Connect Desktop

Getting Started with OL Connect Desktop

This course is your introduction to designing personalized, variable data print documents using OL Connect Desktop. Through hands-on activities and real-world use cases, you will be able to:

- Design and personalize print templates
- Work with variable data and dynamic content
- Configure output presets for different output requirements

Audience

This course is designed for individuals who need to create variable data documents or 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.