



EDP Certification Handbook

Advice for Electronic Document Professional candidates

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EDP Certification Program—Background

Becoming an Electronic Document Professional (EDP) is an achievement. Certification is a testament to management, colleagues, and yourself that you possess the skills, knowledge, and understanding necessary to be a recognized leader in the electronic document profession. Regardless of whether your work is in the private sector or in government, in the capacity of a technology user, or products and services manufacturer or supplier, the EDP designation will have a positive impact on your job performance, your self-esteem, and your employability.

The Electronic Document Professional Certification Program is sponsored and maintained by Xplor International which is a professional association for the electronic document industry. Xplor International is a not-for-profit association incorporated in the State of Illinois (USA) with its headquarters in Land O' Lakes, Florida. The mission of Xplor is to provide organizations and individuals with learning and networking opportunities that enhance the effective use of electronic document technology to achieve business objectives.

Xplor International is managed by the Association Board of Directors (ABOD) which is elected by its members.

EDP certification has been designed for persons employed in the electronic document industry and is administered by the EDP Commission. All commissioners have successfully completed EDP certification.

Membership in Xplor International is not required for certification or re-certification.

Eligibility

Eligibility for EDP certification is defined in the EDP APPLICATION FORM that includes a CODE OF ETHICS (see appendices) and is available on the website at <http://xplor.org/electronic-document-professional-edp/>.

Eligible candidates submit work examples to the team of evaluators to demonstrate the depth and breadth of their knowledge of the industry along with their professionalism.

In 2014, the EDP Commission adopted a new matrix to evaluate the depth and breadth of knowledge of candidates. The components of the matrix are further explained in item 7 under Advice to candidates and the detailed explanation of the skills and professionalism matrix are included in the appendices (Appendix A).

- To determine the candidate's level of skills required for recognition, a candidate must show a specific skill or level of expertise in a specific step of the document production process that exceeds the skills and knowledge of most others. Skill levels include awareness; basic skill/knowledge; working skill/knowledge; advanced skill/knowledge; and expert skill/knowledge.

- To determine the candidate's role and competency at any step in the document production journey, a candidate must demonstrate reasonable evidence of their experience. **Application process**

The timetable of events is shown in the EDP SCHEDULE and the payment of all money is noted in EDP FEES (see appendices).

What / who is an EDP?

In recent years, the EDP Commission has reviewed the fundamental question of what is an EDP, and how do we know one when we see one?

The answer to the first question really has three facets.

An EDP is:

- Someone who has considerable depth of knowledge in this industry

In other words, someone with skills and knowledge in some aspects of this business that exceed the skills and knowledge of most others.

- Someone who has considerable breadth of experience in the industry

In other words, someone with experience across a range of activities in this business so that they can position their expertise in the context of other activities and roles.

- Someone who is professional

And this is in two parts: someone who has sufficient skills to communicate well as judged by the professionalism of the portfolio they have submitted as well as demonstrating a degree of professionalism in aspects of their work described in the three work examples.

All this was summarized a few years ago by the observation that:

“An EDP is someone I would want to have on my team.” And

more recently by the observation that an EDP is someone:

“... regarded by their peers as having extraordinary knowledge of the electronic document business and a marked degree of professionalism in dealing with people and projects.”

Finally, we are often asked about the real, tangible benefits of attaining EDP certification. The top-ranked benefits cited by EDP-designated professionals include:

- Recognition and respect by industry peers

- Personal sense of accomplishment and validation of expertise
- Career-based credibility as an individual and for a company with demonstrated credentials
- Belonging to a networked community of subject matter experts (SMEs)
- Incentive for continued education and knowledge sharing

Advice for Candidates

If you have reached the stage where you have submitted an application for EDP certification, the chances are that you are EDP material. You simply have to document what you have already achieved in your career in a way that makes it clear to the evaluators that you are indeed an EDP. You have in fact already done the hard work.

1. What is the portfolio?

The certification portfolio comprises three parts:

- Your EDP APPLICATION FORM, outlining your work experience and education
- The signed CODE OF ETHICS, acknowledging your commitment to EDP professional moral standards
- Your portfolio of work examples, revealing mastery of specific industry skills as outlined in section 7 under Depth and breadth of knowledge and Professionalism

Your work examples should illustrate your breadth and depth of knowledge in the developments and practices affecting the electronic document in all its life stages. A candidate must demonstrate a range of skills across various components of the document journey from creation to distribution. For each work example, you will indicate the specific skills in the matrix which you believe are indicative of your expertise. This will assist evaluators in the evaluation process.

More detail about the steps in the document's journey can be found in the appendices. Your work examples must apply to electronic document technologies and **at least two of the three work examples must be less than five years old**. If you have a project that is more than five years old, you must be able to demonstrate that the technologies involved are still relevant in today's industry.

2. EDP resources

Resources provided in this handbook include answers to *frequently asked questions*, the Body of Knowledge Categories from the current Policy & Procedures of the EDP Commission, and the EDP Application form. Additional resources may be available through your Mentor, or by contacting edp@xplor.org for further assistance.

3. Mentors

Probably the best advice offered to any candidate is to have a mentor assigned to help you with the portfolio process.

Anyone can help an EDP candidate with various aspects of their submission but clearly someone who is already an EDP will have very relevant advice to pass on.

To obtain a mentor, candidates should contact Xplor International at edp@xplor.org. The general practice is to locate mentors you know, have heard of,

or who are geographically close. Xplor will assist in recommending mentors as necessary, and contact a mentor on behalf of candidates. If you already have someone who has volunteered to act as your mentor, that is fine but please notify us at edp@xplor.org to assist in our application tracking.

Creating a working relationship with the mentor becomes the candidate's responsibility. In most cases, working with your mentor may be accomplished via email unless you happen to have a mentor who is geographically close to you and one-on-one meetings may be scheduled.

4. Advice before you begin

As with many things in life, an hour taken at the beginning of the process considering what you are going to do is worth at least two hours later.

You need to compile three work examples, so think of possibly five projects that you have undertaken in the past five years. Make bullet points of the various activities they entailed and your roles in each. Take time to review the projects in light of what the evaluators will be looking for—the depth and breadth of your knowledge and your degree of professionalism.

Review this list with your mentor and work with them to select the three work examples that will give you the best shot at demonstrating your abilities and expertise.

5. Work Example Summary Form

The Work Example Summary Form is a worksheet to help candidates prepare each of their work examples. Prior to developing your work examples, you should complete the Work Example Summary Form for each work example project. By first summarizing the essential points for each work example on the form, you organize and prepare to write an example that clearly and convincingly demonstrates your mastery of a body of knowledge skill. This may then serve as the basis of the detailed narrative to be developed comprising the body of each work example.

The Items on the Work Example Summary Form include:

- Title of work example
- Name of your company
- Name of the company referred to in the work example (if different)
- Dates that the work example spanned
- Project summary (approximately 150 words)
- Project objective

- Role definition
- Your principal contributions to the project
- Indication of the skills in which you have demonstrated expertise (level 3 or above) as indicated on the Skills Matrix for that particular work example

When your work examples are completed, please attach each completed Work Example Summary Form to the related work example in your portfolio. A Work Example Summary Form is included in the appendices (Appendix F.2).

6. Your detailed work example narratives

Detailed work examples may be submitted in any format.

A well written work example averages three to five pages, including the Work Example Summary Form page and any supporting documents that may be needed.

A well-recorded presentation work example averages 15 minutes in length and should include the Work Example Summary Form page with a link to the recorded presentation. In accordance with Xplor's strict confidentiality policies, recorded presentations may be private, but the applicant is responsible for ensuring recorded presentations can be accessed by evaluators. Any supporting documents may be presented during the recording and included digitally.

Projects on which work examples are based may include—but are not limited to—published articles, books, forms, presentations at industry gatherings, management documents, font work, software programming and unique applications, proposals, hardware/software/systems-design implementation, consulting, and course development.

Work examples do not have to be “success stories.” They can be “failure stories” in which you gained valuable knowledge in the process. The key point is to include all the information about the choices you made and how you arrived at your decisions. Just tell the whole story in a clear and concise manner.

In an ever-changing environment, new skills come to the forefront while some technical approaches fall out of use. Only one work example may be based on a project completed more than five years ago but you are expected to show current relevancy in those cases.

In Appendix B, there is a checklist that you may find useful when compiling your work examples.

7. Depth and breadth of knowledge and professionalism

In an attempt to quantify a person's degree of knowledge of the electronic document industry, the evaluators will be looking for evidence of a candidate's competence of various skills and roles throughout the document application lifecycle. These skills are more clearly defined in the appendices (Appendix A).

The candidate's skills and roles are perceived to include:

- Stakeholder adoption
- Requirements gathering
- Business analysis
- Technical analysis
- Architecture
- Project design
- Development
- Testing and quality assurance
- Production
- Knowledge sharing / training
- Sales & marketing
- Maintenance

The steps in the document production journey are equally wide ranging and relate to aspects including:

- Data
- Document objects
- Composition
- Print manipulation
- Print management
- Electronic presentation
- Archive
- Print technology
- Mobile delivery
- Web delivery
- Inserting technology
- Delivery processes

In addition, evaluators will look for evidence of professionalism in respect of:

- The presentation of your portfolio and ease of comprehension
- Sufficient information and documentation to demonstrate your abilities and achievements
- Clear indication of project objectives and your role
- Evidence that objectives were achieved or not
- Thoroughness, innovativeness, ability to evaluate and deal with the unexpected
- Exploring new technologies that advance the industry
- People and communication skills
- Financial acumen
- Project management skills

8. Advice about work examples

Remember that the evaluator, while knowledgeable in the business of electronic documents, may not be an expert in your field. So try and strike a balance between explaining it in a way that is understandable while not being patronizing.

- Too little information can leave the evaluator wondering what you actually did.
- Too much information will make the evaluator wish that she or he was reviewing someone else's portfolio!
- Write as though you were talking to someone about your work—do not make it read like a technical journal.
- If you use an abbreviation or acronym, state the name in full the first time you use it.
- Check that the information makes sense. The best way to achieve this is to give it to a colleague and ask them to read it. If they say they do not understand a passage, do not get upset—revise it so that they do—and then the evaluator probably will too.
- Check the content for grammar and spelling—remember this is being reviewed for your professionalism as well as technical knowledge.
- Keep the work example simple and to the point. Eliminate unnecessary words in your sentences.

- Organize paragraphs logically and break long paragraphs into shorter ones that will be easier for the evaluators to read. The easier it is for evaluators to understand your achievements, the easier it will be to award you points for them.
- It is less important whether you physically completed the project or managed those who did, or whether the project was internal or external to your company. It is more important that you clearly specify your role and for whom the project was completed.
- Make sure you attach appropriate documents that support your assertions in the work examples. They need to be relevant and you need to check that it is obvious to the evaluator what they are and their relevance. Documentation should demonstrate the “before” and “after” as well as management documents to verify your role(s) in the project.
- Where decisions were made on any aspect of a project, describe the rationale for the chosen route.
- Where appropriate include any relevant aspects of budget and cost analysis.
- The benefits of liaising closely with your mentor on all aspects of your submission cannot be over-emphasized.
- And the best advice is this—where it is appropriate, use the words ‘I’ and ‘my’ and ‘mine.’
 - ❖ If you did something, then say *I did this ...*
 - ❖ If you supervised something, then say *I was in charge of the ...*
 - ❖ If you had financial responsibility for a project, then say *I was in charge of the money ...*
 - ❖ If it was your idea, then say *It was my idea to ...*

However, when decisions were made at a group level, show these decisions as neutral.

- ❖ The committee determined that ... or research has shown that ... are examples of wording that effectively omit you as the decision maker. Using such language helps to stress your involvement over the groups and highlights your participation without diminishing the group’s activities.

9. Frequently asked questions

- *Who is the EDP certification program designed for?*

The EDP certification program is designed for professionals in the electronic document industry. Both members and non-members of Xplor International are welcome to participate.

- *When will I find out whether my EDP application has been accepted or not?*

You may submit an EDP application and application fee at any time throughout a given year. Usually, you are notified of the outcome within 10 business days of application submission. The timing may fluctuate based on the EDP Registrar's availability.

- *When can I submit my portfolio?*

Once your EDP application has been approved and you have been notified that you are an EDP candidate, you may submit your portfolio and portfolio submission fee at any time within two years.

- *When will I find out whether I have certified?*

Candidates are usually notified of award or denial of certification within four to six weeks of submitting their work examples and supporting documentation.

- *What are the fees associated with the program used for?*

Fees help cover the costs of program administration, the development of program materials, and EDP recognition. A great deal of administrative work is also accomplished by volunteers such as Commissioners and mentors who assist to promote the long-term good of the industry.

- *What are the benefits of certification?*

The EDP program allows individuals to differentiate themselves. Certification brings recognition, financial opportunities, and personal satisfaction. In fact, according to an independent survey of program participants, the most common benefits include peer and employer recognition, improved opportunities for raises and promotions, and a sense of personal accomplishment.

- *How long does it take to complete the certification portfolio?*

Although EDP candidates have up to two years to complete their certification requirements, the actual time needed is about estimated at 40 to 60 hours.

- *How much does it cost to certify?*

After paying the USD \$50 application fee, the only other cost to candidates is the USD \$300 portfolio of work examples submission fee. There is no additional cost to reapply to the program within a two-year period from original notification of acceptance or to appeal should certification be declined.

If you are a current EDA and submit your EDP application within the five-year limit, the EDP application fee of USD \$50 is waived and you will only pay the US \$300 portfolio evaluation fee.

- *Do fees have to be paid in US dollars?*

Yes, Xplor International requires payment in US dollars. If you are unable to pay in US dollars, please contact Xplor International, EDP Administrator at +1 813 949-6171 or email to edp@xplor.org.

- *How should I submit my application and portfolio?*

Xplor International requires all applications, work examples, and supporting documentation to be submitted in PDF format via an email to edp@xplor.org.

- *Will I get my portfolio back?*

No, the portfolio is retained for five years and then destroyed. Please retain your own copies as needed.

- *Will my portfolio ever be displayed?*

As part of strict confidentiality policies related to portfolio evaluation, certification portfolios will not be displayed without written permission from the individuals who submitted them. All EDP mentors and evaluators are required to sign a confidentiality agreement by Xplor International to ensure confidentiality of information presented.

- *What happens if I do not qualify for certification?*

You may resubmit your portfolio within a two-year period from original notification of application acceptance, or contact Xplor International at edp@xplor.org by December 31 of the year in which your certification was declined to request a review of your previously submitted portfolio by a certification appeal panel.

- *How do I choose a mentor?*

Contact your local Chapter or Region, other EDPs, or Xplor International at edp@xplor.org to request a mentor. If there is any problem with the mentor chosen, you can select a different mentor at any time.

Appendices



A. Electronic Document Professional Body of Knowledge Categories

Table A – Depth and breadth of knowledge matrix

Level of skills required for recognition

To receive a mark on the matrix, the candidate must show a specific skill or level in a specific step of the document production process that exceeds the skills and knowledge of most others.

Experience has shown that most successful candidates require at least a **level-3** skill or knowledge in a specific step, as documented in their Work Examples, to receive a point on the matrix. We believe that this is the appropriate level of knowledge to show depth and breadth along the axes. Please review the table below to understand better a working skill / level of knowledge in comparison to other levels of skill.

Skill level hierarchy

Must achieve skill level 3 or higher to place a "X" in the box

1. Awareness

Have heard of the technology and understand how it might relate to person's areas of knowledge

2. Basic skill/knowledge

Familiarity with basic functionality and concepts but may need to rely on assistance from documentation or other resources

3. Working skill/knowledge

Working knowledge of functionality and concepts, can use product (perform role), or explain concepts with little or no assistance

4. Advanced skill/knowledge

Substantial experience with functionality, (role), or concepts, can teach others how to use functionality or explain concepts.

5. Expert skill/knowledge: Extensive and comprehensive experience with functionality or concepts can create or customize code, architecture, or processes

Figure 1: Skills assessment hierarchy

Appendix A: EDP Body of Knowledge Categories

Matrix

The skills matrix used for evaluation purposes is illustrated in the figure below:

		Document Application Development Lifecycle											
		Stakeholder adoption	Requirements gathering	Business analysis	Technical analysis	Architecture	Project design	Development	Testing and quality assurance	Production	Knowledge sharing / training	Sales & marketing	Maintenance
Document Production Journey	Data												
	Document objects												
	Composition												
	Print streams and print stream manipulation												
	Print management												
	Electronic presentation												
	Archive												
	Printing technology and process												
	Mobile delivery												
	Web delivery												
	Inserting technologies												
	Systematic document distribution												

Figure 2: Skills matrix

The EDP candidate's work portfolio is evaluated using the above matrix. As with all matrices, there is more than one dimension. These two dimensions on the matrix identify:

1. A skill shown along the **X-axis: Document Application Development Lifecycle**
2. Shown within a step of the **Y-axis: Document Production Journey**

Appendix A: EDP Body of Knowledge Categories

When the evaluator believes there is **reasonable evidence of the candidate's role and competency** at any of the steps in the document journey, they will place a tick in the relevant box.

For example, if the candidate demonstrates that they developed the business case for acquiring a new printer, the evaluator would give the candidate a mark within the cell where **business analysis** on the X-axis crosses with **print technology** on the Y-axis.

Ticks for all three work examples are entered on the same matrix. Only one tick is entered in any cell.

X-axis: Phases / roles of the document application development lifecycle

The horizontal axis lists the possible skills and roles demonstrated by the candidate, ranging from identifying needs through to implementation and training. The skills and roles include:

1. Stakeholder adoption

During this phase, the candidate participates in presenting the project proposal or selling the client on the product. Activities and roles include:

- development and delivery of presentations and proposals
- finalizing any legal issues including intellectual property, contractual, security, or confidentiality issues
- finalizing specification and contracts

2. Requirements gathering

During this phase, the candidate identifies its business problem(s) and develops an initial plan to address them. Activities and roles include:

- determining stakeholder needs
- facilitating joint analysis and design sessions
- facilitating focus groups or user surveys
- attending conferences, workshops, and courses on the business topic
- reviewing merger and acquisition documents
- reviewing white papers and trade articles
- reviewing compliance and legal issues

3. Business analysis

During this phase, the candidate identifies current costs, potential cost-savings, costs of conversion, and potential costs of inertia. Activities and roles include:

- cost benefit analysis
- cost of ownership
- design costs
- programming costs
- ongoing operational costs

Appendix A: EDP Body of Knowledge Categories

- retirement costs
- increased revenue or profit opportunities
- economic risks from change or potential disruptions

4. Technical analysis

During this Phase (which is usually concurrent to business analysis), the candidate identifies the current state of technology or process, the desired technology or process, the gap, and the anticipated project path to the desired state. Activities and roles include:

- assessment of current technology
- identification of enhanced or replacement technology
- evaluation of processes and practices compared to best practices
- identification of impact to other processes or to resource pool

5. Architecture

Once there is stakeholder acceptance, the candidate assists with the development of an overall architectural schema and project plan. Activities and roles include:

- development of the application workflow
- identification of automated document factory audit and reconciliation steps
- development of the project plan
- initial mock-up of document to be produced

6. Design

During this phase, the candidate adapts the architectural documents and plans produced. Activities and roles include:

- creation of document design guide
- creation of functional specification and/or project charter
- creation of the data dictionary
- identification of required document objects
- any documents that define the developed document

7. Development

During this phase, the candidate participates in the programming, installation, or procurement of the necessary components to create the solution. Activities and roles include:

- participation in project review meetings
- participation in document design reviews
- supervision of electrical contractors and movers
- participation in meetings with forms, paper, or envelope suppliers
- programming or management of programmers

Appendix A: EDP Body of Knowledge Categories

8. Test and quality assurance

During this phase (that would run almost in parallel to development), the candidate assists in creating and performing tests on the components and on the integrated system. Activities and roles include:

- test case development
- testing and trouble shooting
- installation integration testing
- paper and environmental testing
- data to post office testing
- parallel processing
- promotion to production

9. Production

During this phase, the candidate participates in the management of the production process. Activities and roles include:

- initial staff training
- ongoing management of process
- staffing and personnel management
- logistics planning
- paper and environmental monitoring
- service level management

10. Knowledge sharing / training

Applicant shares information about the project to a larger audience either in or outside the organization. This includes events/items such as webinars, trade shows, books (e.g. the EDBOK), internal training, or another presentation forum that helps others become aware of the benefits, efforts, and successes of electronic document technology in action.

- Presenting concepts, performance, or results of the work product in an industry forum (conference, webinar, article, etc) to a wider audience
- Creating documentation for the work product
- Creating training materials (internal or external) for others to understand the technology and work product
- Delivering training classes related to the work product for colleagues, clients, or industry peers.

11. Sales & marketing

Taking new or updated products and services to market requires many types of effort, from market research, competitive research, pricing, value proposition development, marketing, messaging, contract authoring, sales channel development, and finally selling the product or service. If the applicant is involved in any aspect of sales or marketing, they can prove experience in this category. Any sales and marketing activity listed below can earn points in this area.

Appendix A: EDP Body of Knowledge Categories

- Creating marketing materials such as brochures, videos, demonstrations, trade show booths, marketing campaigns or other awareness building assets
- Selling, negotiating, pricing, or setting up direct or indirect sales channels

12. Maintenance

This phase focuses on process improvement. Activities and roles include:

- ongoing training
- online or call center technical support
- change control
- documentation management
- identification of new business issues or requirements
- planning for eventual retirement of system

Y axis: Steps in the Document (Production) Journey

The vertical axis lists identifiable steps in the Document Journey, steps that start with the creation of a document and run through to printing and finishing. The steps (with suggested examples) include:

1. Data

The first step to producing a transaction document is to get the right data.

Areas of expertise include the fundamental classifications of data, different data structures, data extraction, normalization, and the terminology associated with extracted data.

2. Document objects

Production documents contain numerous document objects and their structures. These include text objects, fonts, images, graphics, and style sheets. Areas of expertise include the types of document objects employed, how to develop, review, and promote them into production, and why they are significantly different from data. Sub-components include:

Typography

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

Areas of expertise include the different styles, faces, and media characteristics of different type and the different types of numeral styles available. Also included are the fundamentals of typography including the structure, the terminology, and how they actually work.

Steganography and other document metadata

Many system-generated documents carry machine readable information; some of it virtually invisible to the naked eye.

Appendix A: EDP Body of Knowledge Categories

Areas of expertise include machine-based fingerprinting; stealth characters; digital watermarking within images; and glyphs, barcodes, OMR, OCR, and MICR.

Color management

Areas of expertise include the fundamentals of color management, the differences between CMYK and RGB, color profiling, and cultural and accessibility issues associated with different colors.

3. Composition

Composition systems play an extremely important role in producing the document. These systems convert data and document objects into documents and mail-pieces.

Areas of expertise include mail-piece hierarchy, layout fundamentals, conditional processing, and postal preparation.

4. Print streams and print stream manipulation

The print stream describes the document and carries the document contents to its presentation medium (paper or display), archive, and other destinations. Print stream manipulations include changes to a print stream such as adding barcodes, making use of white space, or carrying out address hygiene while transformations include converting from one print stream type to another.

Areas of expertise include the major print streams, their key attributes, their applications, and methods of transformation.

5. Print management

Print management systems optimize the production workflow, provide breakdowns of production costs, and ensure that all documents are printed. Areas of expertise include print queue management, error recovery, and reconciliation principals.

6. Electronic presentation

Transaction mail production includes the creation of legally relevant documents that will be delivered electronically.

Areas of expertise include the general principles of multi-channel / multi-media presentation, the options available, and when to use them. This would include PDF, XML schemas, and digital signatures. It also includes any technology or practices that prove the authenticity and irrefutability of the document. This does not include technologies of practices dealing with electronic distribution (please see 12)Systematic document distribution

7. Archive

During the production of legally relevant documents, organizations usually keep a “carbon copy” for future reference. These copies-of-record topics include call centre queries, requests for additional copies, court orders, etc.

Appendix A: EDP Body of Knowledge Categories

Areas of expertise include business reasons to archive, promoting system-generated correspondence into an archive, and indexing metadata.

8. Mobile delivery

The design, delivery, tracking, and core integration technology used to render documents on a mobile device. Mobile devices include items such as smartphones, tablets, wearable technology, or other non-print and non-PC displays. Documents intended for these devices are designed to be viewed at many different sizes on different operating systems and software.

Areas of expertise include CSS-based responsive design, User Experience (UX), “apps,” SMS (text messaging), or other mobile delivery technology.

If the work product is designed to receive data from or deliver data specifically formatted for a mobile device (smartphone, feature phone, tablet, or other wearable or mobile technology), the candidate may earn points for mobile delivery.

- Design specifically for mobile devices, including concepts or responsive design
- Deliver to an “app” in a native mobile operating system (iOS, Android, Windows Mobile, Blackberry, or other)
- Set up infrastructure to facilitate mobile interactions
- Receive mobile data from a customer or employee for use in a later business process
- Interactions with RFID, NFC, Beamers, or other location aware devices

9. Web delivery

Designing, integrating, and displaying documents intended to be viewed through a web browser. When delivering a document via a web browser, consideration must be given to responsiveness, ease of use, and readability (i.e. able to view on multiple screen sizes and resolutions).

Areas of expertise include browser optimization, CSS, JavaScript, tracking capabilities, and integration to server side systems such as web servers, application servers, and web content management (WCM).

If the work product is designed to receive data from or deliver data specifically formatted for a non-mobile web device, like a PC, notebook, laptop, kiosk, browser, the candidate may earn points for mobile delivery.

- Design specifically for web delivery to a computer or static display
- Design or deliver via email, HTML, Flash, or other web technologies
- Delivery and infrastructure design or deployment to support web-based communications

Appendix A: EDP Body of Knowledge Categories

10. Printing technology and process

High-speed printing systems create most of the transaction documents within our industry.

Areas of expertise include electro-photographic and inkjet technologies. Subcategories include:

Laser printing technology

Almost all transaction mail is produced today on xerographic printers, affectionately called lasers.

Areas of expertise include the electro-photographic process, the differences between continuous and cut sheet, and the nuances of resolution versus perceived quality.

Inkjet printing technology

Inkjet production printers are becoming a major alternative to xerography, especially for process color onto blank stock.

Areas of expertise include the inkjet process, including the fundamentals of paper and ink, and the different types of production inkjet technologies.

Operational environment

Production printers and inserters require special environments to ensure sustained production, optimal print quality, and reliable inserting. They also require preventative maintenance before they fail. Even the best designed and manufactured device will quickly deteriorate without proper conditions and pre-emptive care.

Areas of expertise include ambient production environments, critical operator tasks, and supplier maintenance planning.

Paper specifications

There are over 50 different types of business paper available, almost all of which would be disastrous if used on a production printer or inserter. There are also numerous weights and sizes to choose from.

Areas of expertise include the different types of paper available, the only ones appropriate for high volume document production, the difference between xerographic and inkjet paper, and how to properly condition paper for production.

11. Inserting technology

All seasoned document production people know that most problems happen at the time of inserting. This step is the most mechanical, the least automated, and subject to operator error or malice. Every document that jams on the inserter

Appendix A: EDP Body of Knowledge Categories

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

Areas of expertise include the subcomponents of a production inserter, use of barcodes to manage the process, software-based document control, and envelope inkjet printing.

12. Systematic document distribution

Postal preparation

Candidate demonstrates knowledge of the processes and regulations.

Areas of expertise include postal history, treaties, regulations, processes, optimization of the cost of postage, and postal barcodes (such as USPS Intelligent Mail Barcode).

Electronic delivery

Candidate demonstrates knowledge of electronic delivery technologies and practices, including SMTP, (S/)HTTP, digital signatures, firewalls, spam filters. This would also include technologies or methods for proving presentation of document to recipient.

Other systematic processes for document distribution

Candidate demonstrates knowledge of an unidentified type of managed document distribution employing either technologies or business practices similar to postal or electronic distribution.

Appendix A: EDP Body of Knowledge Categories

Table B – EDP Professionalism

The evidence of professionalism is captured in the Table B that comprises six mandatory criteria, which must be scored, and seven optional criteria of which three must be scored.

EDP Professionalism	
1 = poor 5 = average 6 = slightly above average 7 = moderately above average 8 = above average 9 = very good 10 = outstanding	
Mandatory score each	Work example well-presented and easy to comprehend
	Candidate provides sufficient documentation to illustrate the project
	Candidate provides clear project objectives and rationale for chosen approach
	Candidate provides clear indication of candidate's role in project
	Candidate provides evidence that objectives were achieved or not
	Candidate demonstrates thoroughness throughout the project
Optional score 3 or more of most relevant topics	Ability to evaluate the project and monitor the results
	Ability to deal with the unexpected
	Using technology that advances the industry
	Ability to consult with, motivate, and lead people
	Demonstrates innovative approach
	Demonstrates awareness of financial considerations
	Demonstrates good project management skills

Figure 3: EDP Professionalism

Scores are 1 out of 10 and the guidelines are **1 = poor**; **5 = average**; 6 = *slightly above average*; 7 = *moderately above average*; 8 = *above average*; 9 = *very good*; **10 = outstanding**.

The mandatory questions are:

- work example well-presented and easy to comprehend
- candidate provides sufficient documentation to illustrate the project
- candidate provides clear project objectives and rationale for chosen approach
- candidate provides clear indication of candidate's role in project
- candidate provides evidence that objectives were achieved or not
- candidate demonstrates thoroughness throughout the project

Appendix A: EDP Body of Knowledge Categories

The evaluator must score all of the Mandatory categories in each of the three columns for each work example.

And the Optional categories include:

- ability to evaluate the project and monitor the results
- ability to deal with the unexpected
- using technology that advances the industry
- ability to consult with, motivate, and lead people
- demonstrates innovative approach
- demonstrates awareness of financial considerations
- demonstrates good project management skills

The evaluator must score at least three of the seven Optional categories that are relevant to each work example

Appendix B: EDP Code of Ethics and Declaration

B. EDP Code of Ethics

B.1. Declaration

This code of ethics is acknowledged and signed in the original application form. It is repeated at the start of the candidate's portfolio along with the candidate's declaration and signature.

Code of Ethics for Electronic Document Professionals

As an Electronic Document Professional (EDP), I will strive to maintain and improve the standards of the profession and encourage the spread of knowledge relating to the development of the industry.

I acknowledge that I have an obligation to society. Therefore, I will actively cooperate with other Electronic Document Professionals to promote the understanding of the key role of electronic document systems in business and its power to help people communicate.

I recognize that, as part of a worldwide fellowship I shall be loyal to my fellow Electronic Document Professionals (EDPs), and be willingly share my experience and participate ways to advance the technology and our profession.

I will not use confidential information pertaining to the business of a fellow EDP to advance my own interests.

As an Electronic Document Professional I recognize the need for an open relationship among customers and suppliers. I shall therefore endeavor to be honest and fair in my commercial relationships.

I have an obligation to use electronic document systems in ways that will best meet my employer's mission and encourage other associates within the organization towards the same goals.

I acknowledge that this Code of Ethics is an integral part of the rights and responsibilities conferred upon me as an Electronic Document Professional.

Candidate's declaration

I certify that the information supplied here is true and correct. I understand that any knowingly false statement herein is grounds for this application to be rejected or the EDP designation, if granted, to be revoked.

By signing this document, you grant Xplor International the right to use your name and/or company name to promote your success in the Electronic Document Certification program. Your contact details will not be released to any third parties without prior consent.

Check the appropriate box for agreement: Yes, you can use my name:
company name: both:

Signature _____ Date _____

C. EDP Fees

Appendix C: EDP Fees

Note that any applications and portfolios will not be evaluated without timely and appropriate payment of fees.

The EDP Commission at their first meeting of each year shall review program fees. Proposed revisions and effective dates must be presented to and approved by the Association Board of Directors.

All fees shall be used for program administration and are not refundable.

Xplor International requires payment in US dollars. Payment can be made with a US bank check in USD (made out to Xplor International), or with an American Express, MasterCard, or Visa credit card. If you are unable to pay in US dollars or by one of the methods, please contact Xplor International, edp@xplor.org.

- **EDP Certification fees**

USD \$50 Application for EDP certification. The application fee is waived for a current EDA if they apply within five years of receiving their EDA designation.

USD \$300 Submission of the portfolio of work examples

Note: the same fees are applicable for Xplor members and non-members.

- **EDP Recertification fees**

USD \$25 Paid yearly or USD \$125 during the five year recertification period

Appendix D: Sample EDP Certification Schedule

D. Sample EDP Certification Schedule

Note that any applications and portfolios will not be evaluated without timely and appropriate payment of fees.

The schedule below provides an estimated duration for each phase of activities. Your schedule may vary based on the amount of time you put into the process.

Weeks	Activities
2 to 4	<ul style="list-style-type: none">• Determine your eligibility• Submit completed application for certification• Submit application fee, if appropriate
3 to 8	<ul style="list-style-type: none">• Review all materials and list questions you have about the certification process and the work examples• Select a mentor or request a mentor be appointed for you• Identify three work examples• Write general outline, summary, and list supporting materials for each• Discuss these with your mentor and agree suitability of your selection and content
2 to 4	<ul style="list-style-type: none">• Compile first work example and share it with your mentor• Update based on critique
2 to 8	<ul style="list-style-type: none">• Compile the other two work examples• Share with your mentor• Update based on critique• submit the completed portfolio and supporting documents• Submit evaluation fee
2 to 4	<ul style="list-style-type: none">• The Certification Evaluation Panel reviews your portfolio• The Panel's determination is presented to the EDP Commission by the Evaluation Chair• You will be notified of the results
	<ul style="list-style-type: none">• You will be awarded an EDP Plaque and Certificate at the annual Xplor conference

Appendix E: Certification Program Volunteer Confidentiality Covenant

E. EDP Certification Program Volunteer Confidentiality Covenant

This Confidentiality Covenant ("Covenant") is made this _____ day of _____ 2015 (Valid for the term of the volunteer position) between _____ ("Volunteer") who is assuming the volunteer position of _____ and Xplor International, 24156 SR 54, Suite 4, Lutz, Florida 33559.

Preliminary Recitals

1. Xplor International (also known as "Xplor") is a not-for-profit trade association, or a region or a chapter thereof, which provides a forum for the development and exchange of information, statistics and support among users of advanced electronic document systems and between these users, manufacturers of such systems and other suppliers of pertinent goods and services. It is through Xplor's members, including its global and other conferences made up primarily of members, that it accomplishes its purposes. The vendors of electronic document systems and related services also play a part in the communication and interaction provided as a part of the forums.
2. As the result of the importance of its membership (as well as vendors) to Xplor, Xplor's database, including its membership list and list of related persons and entities, including vendors, is a valuable asset of Xplor. Such data or lists ("Mailing List") include paid memberships, meeting attendees, and lists of vendors and speakers who have participated in national, regional and/or chapter meetings.
3. Volunteer is a director, officer, chairperson or similar volunteer functionary of Xplor, is a vendor wishing to contribute services (and goods) to Xplor or is about to assume such position or make such contribution. As part of Volunteer's duties in such position or in rendering such services, Volunteer may have access to (or may have occasion to consult) the Xplor database for use by Volunteer in the course of Volunteer's duties for Xplor.
4. Volunteer acknowledges that, while Xplor gains from Volunteer's services, provided without monetary compensation, Volunteer also gains from such participation in Xplor's activities. The networking with other professionals in the industry which takes place, and the professional knowledge absorbed, in the course of Volunteer's service for Xplor, as well as the recognition of having helped Xplor, are and/or will be of benefit to Volunteer.

NOW, THEREFORE, in order to induce Xplor to allow Volunteer to commence and/or continue Volunteers duties on behalf of Xplor, which may include access to the Xplor database, Volunteer AGREES AND COVENANTS as follows:

Appendix E: Certification Program Volunteer Confidentiality Covenant

1. **Preamble: Preliminary Recitals.** The preamble and preliminary recitals set forth above are hereby incorporated in and made a part of this Covenant.
2. **Confidentiality.** Volunteer shall keep confidential and shall not divulge or disclose to third parties all or any portion of the Xplor database or any information there from, whether in the form of paper or "hard" copies or digital or electronic or computer data or microfiche or microfilm or in any other form (whether transmitted electronically, over telephone lines or through transfer or copying of disks or otherwise). If Volunteer is granted access to the Xplor database, Volunteer shall only use it for the express purposes of Xplor, and use of the Xplor database for any other purposes, including without limitation, for use any business with which Volunteer may be associated, is expressly prohibited. Volunteer further agrees to abide by all Xplor International Federal Trade Commission compliance instructions.

In addition to the database and related information the "volunteer" also agrees to keep confidential any information regarding the Association, specifically designated as confidential.

3. **Enforcement.** Volunteer acknowledges that in the event of violation of this Covenant, Xplor shall have the right to terminate Volunteer from Volunteer's position with Xplor. Whether or not Volunteer is terminated, Xplor may enforce this Covenant by any legal means which Xplor chooses, without posting a bond, including, without limitation, by obtaining a temporary restraining order and/or an injunction or by using other legal means.
4. **Governing Law.** This covenant shall be construed and enforced, and all questions concerning compliance with its terms shall be determined, under the laws of the State of Illinois.

The undersigned has executed this Confidentiality Covenant on the day and year first written above.

Volunteer (Please Sign) _____ Date _____

Appendix F: Work Examples Checklist and Summary Form

F. Work Examples Checklist and Summary Form

F.1. EDP Work Example Checklist

Your work examples are your defense-of-claim that you have enough practical industry expertise to warrant Professional designation and they represent your professionalism. The evaluators will spend about one hour evaluating all three, so your examples should clearly lay out your case in the 15-20 minutes that the evaluator will typically spend on each one.

The most successful candidates will lay out their example with a strong, concise introduction, highlighting their role and the key areas of knowledge they subsequently document. They then follow the *document journey* chronology, referring to the areas of knowledge in each step. Although some of the steps may be irrelevant or not part of your area of knowledge, it is better to explain why than to ignore it (you show the evaluator that you are aware of it). Special consideration should be given to examples of project leadership.

Your key back-up documentation should include, where applicable:

- An example of the final product (e.g. print sample, photo of the installation ...)
- An architectural schematic or route map of the document
- Project plan
- A functional specification or statement of work

Areas of knowledge

Look at each of these aspects of document knowledge and ensure that each of your examples demonstrate expertise in at least three of them and not the same three throughout your portfolio

- Business needs knowledge
 - Financial knowledge
 - Research skills
 - Pre-sales skills
 - IT infrastructure, operating systems, networks, print-server, connectivity knowledge
 - Data extraction, assembly, composition,
 - Design, typography and layout experience
 - Implementation, quality assurance and troubleshooting skills
 - Image production, distribution, storage, retrieval
 - Insertion, finishing and mailroom knowledge
 - Management and training skills
 - Documentation and presentation skills
 - Content management knowledge
 - Consumer legislation, licensing, regulations, compliance, data protection, etc.
- Writing your work example*

Appendix F: Work Examples Checklist and Summary Form

Check that you have given enough attention to these few points:

- The summary is important to evaluators as it sets the picture of what is to follow and if good, will incline them toward the rest of your portfolio
- Make clear all your skills and experience that are relevant to each work example
- Always check that you have emphasized your role in the work *Case study structure*

Do not try to cram too much information onto the page. Remember that the easier it is for the evaluators to read, the more they will comprehend it. Five pages of well-spaced information are preferable to four pages of clutter.

Although you will never know who read your portfolio, you can assume that some of them will be ageing baby-boomers with imperfect eyesight and that these people are most comfortable with structured technical documentation.

Therefore:

- If it is a new thought, it should be a new paragraph
- A hierarchy of say three levels of heading will help considerably
- Choose an appropriate type face and font size and ensure that the leading between the lines makes for easy reading

F.2. EDP Work Example Summary Form

This Work Example Summary Form, which includes the Skills Matrix is important for several reasons. It helps the evaluation panel select suitable people to evaluate your portfolio and enables evaluators to confirm their suitability and focus their minds on the task ahead. It can also help you to map out each example.

Consider sharing the three Work Example Summary Forms, and Skills Matrices with your mentor before embarking on the work example narratives.

Note that the greater the differences in the content of the examples, the greater the breadth of experience you will demonstrate. And say what **YOU** did rather than just what happened!

An EDP is someone regarded by their peers as *having extraordinary knowledge of the electronic document business and a marked degree of professionalism in dealing with people and projects.*

This is your chance to demonstrate these attributes.

Appendix F: Work Examples Checklist and Summary Form

F.2.1 Sample Work Example Summary Form

Your name
Title of work example
Your company
The company referred to in this example (<i>if different</i>)
Dates the work spanned (months & years)
Project summary (about 150 words)
Project objectives
Project limitations (if any)
Your role in the team & in the project
Your principal contributions to the project

Appendix F: Work Examples Checklist and Summary Form

F.2.2 Sample Work Example Summary Form Skills Matrix

Specific skills from the Matrix you utilized in the work example to indicate your expertise (level 3 and above); simply place an X in each box as appropriate below:

		Document Application Development Lifecycle											
		Stakeholder adoption	Requirements gathering	Business analysis	Technical analysis	Architecture	Project design	Development	Testing and quality assurance	Production	Knowledge sharing / training	Sales & marketing	Maintenance
Document Production Journey	Data												
	Document objects												
	Composition												
	Print streams and print stream manipulation												
	Print management												
	Electronic presentation												
	Archive												
	Printing technology and process												
	Mobile delivery												
	Web delivery												
	Inserting technologies												
	Systematic document distribution												

G. Certification Credits



Electronic Document Professional (EDP)

Certification Credits

Applicable for EDP Certification, EDP Re-Certification, & M-EDP

Certification as an Electronic Document Professional is based on a point system, as is EDP Re-certification and M-EDP certification.

The Xplor EDP Commission recognizes both Educational Credits and Knowledge Sharing Credits as Certification Credits.

Education (must be in or related to the electronic document industry)

Topic	Credits Awarded
Education Credits	
Higher education, college, or degree earning studies	10 credits per year - maximum of 50 credits
Attending conferences, courses, seminars, certificate programs sponsored by educational institutions, professional trade associations, vendors, government agencies, consulting firms, and other relevant seminars. All must be directly related to the electronic document industry to qualify for credits. Each activity must have a professional content, and instructor/presenter.	6 credits per day 3 credits per half day
Participating in live, recorded, and internal online webinars sponsored by educational institutions, professional trade associations, vendors, government agencies, consulting firms, and other relevant webinars. All must be directly related to the electronic document industry to qualify for credits. Each activity must be at least one hour, have a professional content, and instructor/presenter.	1 credit per hour, maximum 5 credits per day
Completing industry exam related courses, or accredited courses (CEU) taken in the last five years directly related to the industry	10 credits per CEU or passing grade
Being awarded professional certification in an occupation directly related to the industry	25 credits per certification

Appendix G: Certification Credits

Knowledge Sharing (must be in or related to the electronic document industry; may be internal corporate knowledge-sharing activities for individuals who are not permitted to share knowledge publicly)

Topic	Credits Awarded
Writing an article published in the public domain	10 credits
Editing a book (each) or journal (per year)	20 credits
Writing a book published in the public domain	40 credits
Preparing a presentation (20-90 min)	4 credits
Giving a presentation (20-90 min)	4 credits
Moderating/participating in a panel	4 credits
Preparing half-day seminar or workshop	12 credits
Running half-day seminar or workshop	4 credits
Preparing a 1-day seminar or workshop	16 credits
Running a 1-day seminar or workshop	8 credits
Running list servers, moderating a chat room, FAQ, special interest forum, starting and maintaining blogs; developing and maintain other social media channels	10 credits per year
Starting a discussion using social media	1 credit, Maximum 5 credits per year
Serving as a board or committee member	10 credits per year
Serving as a mentor in a certification program	10 credits per candidate
Serving as an evaluator in a certification program	10 credits per year
Referring a successful EDA or EDP candidate	1 credit (Maximum up to 5 referrals/credits per year)
Taking part in or been responsible for a project that falls outside the list of activities listed above – projects similar to the case studies submitted for your EDP portfolio or perhaps the granting of a patent. If this is the case, please provide an account of the project in less than 1,000 words describing the key features and explaining its merits. The EDP Commissioners may want to discuss it briefly with you before awarding up to 50 credits for the project.	Up to 50 credits for the project

Appendix H: EDP Checklist

H. EDP Checklist

- Complete EDP application form
 - Contact information
 - Work history (at least five years)
 - Certification credits
 - EDP Code of Ethics
 - Initiate payment of application fee
- Compile proof for certification credits
 - Diplomas and transcripts
 - Registration confirmation for conferences, seminars and webinar
- Compile proof of knowledge sharing within the industry
 - Submission acceptances for conference presentations
 - Email confirmations for webinars
 - Proof of online or in-person training sessions
- Prepare three work samples
- Complete the EDP Work Example Summary Form (including Skills Matrix)
- Develop an in-depth work example narrative for each work sample
- Provide supporting documentation



Electronic Document Professional Application

EDP Application: Information about this form

This form is designed to establish your eligibility to apply for certification as an Electronic Document Professional (EDP). It is a means for you to determine whether you are eligible to apply and, for us in turn, to confirm your eligibility. Please take a minute to read through the application before starting to complete the sections.

The requirements are simple:

- You need five years of experience in the Electronic Document Industry and be currently employed in the field *
- You need to accept the Code of Ethics of an Electronic Document Professional
- You need to demonstrate a commitment to continued learning and current awareness in the industry by earning at least **100 certification credits** and supply supporting documentation

Complete the sections that ask for information about you and your work in the Electronic Document Industry as well as certification credits. Then sign the Code of Ethics, sign the Declaration, and give us information on how you are making your payment.

If you need to use additional pages to note additional educational courses, etc., then please indicate clearly on these pages your name and the sections to which the information relates.

Finally, we recommend that you make an **electronic copy** of everything you send with the application form, including any additional notes and your supporting information to edp@xplor.org.

We will let you know if your application is successful. You then need to compile three work examples that demonstrate the depth and breadth of your knowledge in the Electronic Document Industry and submit them to Xplor.

Good luck, and if you have any questions, please call us at: +1-800-669-7567 or +1 813-949-6171 outside the USA.

* **Actively engaged, currently employed, or seeking employment in the electronic document industry.** Due to challenging economic times, this requirement has been modified as stated until further notice.

Information about you

Name (First, Middle Initial, Last):

Address

City, State, or Province Zip or Postal Code

Country:

Phone:

Email Address:

I am currently employed in the electronic documents industry.

I have worked in the electronic documents industry or a related field for _____ years, from _____ to _____.



Electronic Document Professional Application

Your work in the industry – You need 5 years

Please describe your employment starting with your *current* position

Company Name

Your Position or Title

Company Address

Contact Name, Contact Phone and/or Email Address

of Years , *From (Year)* *To (Year)*

Please describe your previous employment

Company Name

Your Position or Title

Company Address

Contact Name, Contact Phone and/or Email Address

of Years , *From (Year)* *To (Year)*

Company Name

Your Position or Title

Company Address

Contact Name, Contact Phone and/or Email Address

of Years , *From (Year)* *To (Year)*

Company Name

Your Position or Title

Company Address

Contact Name, Contact Phone and/or Email Address

of Years , *From (Year)* *To (Year)*

Company Name

Your Position or Title

Company Address

Contact Name, Contact Phone and/or Email Address

of Years , *From (Year)* *To (Year)*

Your Certification Credits – You need 100

Describe your higher education, college, or degree earning studies – 10 credits per year up to a max of 50

Organization

Course

of Years , *From (Year)* *To (Year)*

Organization

Course

of Years , *From (Year)* *To (Year)*

Organization

Course

of Years , *From (Year)* *To (Year)*



Electronic Document Professional Application

Declaration

I certify that the information supplied here is true and correct. I understand that any knowingly false statement herein is grounds for this application to be rejected or the EDP designation, if granted, to be revoked.

By signing this document, you grant Xplor International the right to use your name and/or company name to promote your success in the Electronic Document Certification program. Your contact details will not be released to any third parties without prior consent.

Check the appropriate box for agreement: Yes, you can use my name: company name: both:

Signature

Date

Information about your payment

The USD \$50 application fee is non-refundable and is required for the EDP Registrar to determine your eligibility for the EDP certification. You can pay by a bank check in US dollars, or by one of the credit cards listed below.

Check

VISA

MasterCard

American Express

Make Checks Payable to:

Xplor International

Mail Checks to:

Xplor International, 23110 SR 54, #114, Lutz, FL 33549 USA

Credit Card Number:

Expiration Date:

Security Code:

Address where credit card statement is received:

Thank you for applying to the EDP Certification Program. Please remember to provide supporting documentation such as copies of course certificates, certification awards, diplomas, or conference registration documents, or attendance badges. If you needed additional space when filling out the sections, then please remember to attach the additional sheets.

If you want more information on the certification program, its requirements, and the timeline, please go to <http://xplor.org/edp-certification-program/> or edp@xplor.org.

Please complete this form and return it with copies of all supporting information to edp@xplor.org or by mail:

Xplor International
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Lutz, FL 33549
US