

# PersonalEffect

## Customer Expectation Document

Version 10.0

Revision 3.2



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A **xerox**  Company

# Introduction

This document is designed to communicate customer expectations in the areas of hardware and software platform requirements, knowledge, skill and training in order to achieve the best experience and results with XMPie PersonalEffect.

## PersonalEffect and uCreate Print interactivity

uCreate Print creates print-ready files right from the desktop. In addition, uCreate Print can export files in a format that can be used by PersonalEffect. This capability brings several benefits to uCreate Print customers:

- The capability to work with PersonalEffect customers to handle Variable Data Print (VDP) jobs that may exceed the capabilities of the uCreate Print shop.
- The ability to create VDP print applications to be offered in a web-to-print installation hosted by a shop with PersonalEffect and uStore.
- The power and performance of Adobe InDesign Server rather than desktop versions
- The ability for multiple people to work together on the same project using the uProduce server as a hub for collaboration
- The ability to offer customers integrated campaigns including print/web/email/mobile
- The ability to offer customers Response URLs (RURLs) to include on direct mail print pieces
- Access to campaign metrics through Marketing Console

## Software components

This section outlines the individual software components available in the full PersonalEffect family. Each product configuration includes a specific subset of the components mentioned below:

### uCreate Print

uCreate Print extends Adobe® InDesign to allow designers to create high-end dynamic print documents.

### uCreate Designer

uCreate Designer is a limited version of uCreate Print, intended for the design and review of Dynamic Document. While the design and logic are performed with this tool, the actual VDP production is performed on the uProduce server.

### uChart

uChart comes in two versions: enabled within uCreate Print or as an add-on to the PersonalEffect uProduce Server. The desktop version of uCreate Print allows customers to create charts and graphs directly on the workstation. uCreate Print Designer does not include uChart.

## ulmage

ulmage comes in two versions: enabled within uCreate Print or as an add-on to the PersonalEffect uProduce Server. ulmage allows customers to generate Photoshop and Illustrator personalized images to be used within marketing materials such as print templates, email campaigns and personalized websites.

## uPlan

uPlan is a standalone application installed on a Windows desktop machine. It is used for creating a Plan file, which defines the ADOR Objects (also known as Content Objects) which contain the business rules and links back to the data schema.

## uStore

uStore is an optional component to PersonalEffect, allowing customers to build e-commerce-enabled storefronts.

## uProduce

The XMPie uProduce server acts as a production server, giving production departments a centralized environment with full control over organizing, proofing, prioritizing and producing every phase of variable production.

The user interface for campaign management is located in Circle and uses uProduce server at the backend.

## Circle

Circle is a cloud-based application that acts as the production hub for cross-media campaigns, simplifying the transition from campaign design to production. Circle allows you manage the full campaign life cycle – starting from the campaign conceptualization through its implementation and execution to tracking and analytics.

## Circle Agent

Circle Agent is a low footprint component used to communicate between Circle and uProduce. It is typically installed on the uProduce server.

## XMPL Server

The XMPL Server is used to serve personalized websites. It includes webpage hosting, friendly URL mapping and web APIs used for reading and writing ADORs, adding recipients and writing tracking information. XMPL is a server component managed by Circle.

XMPL Server can be scaled out to multiple XMPL Servers to achieve fault tolerance and to handle large loads.

## uProduce Marketing Console

uProduce Marketing Console provides a browser-based interface allowing users to view up-to-the-minute metrics on cross-media campaigns.

## uCreate Print packages

Each package includes plug-in capabilities depending on the license that you will own, as described below:

Product	License Required	InDesign Plug-in Name	Plug-in Capabilities							
			Link to Data	Link to Plan	Export CPKG/DPKG	VDP Output	XLIM Capabilities	Includes ulmage, uChart	Connectivity to uProduce	Connectivity to Circle
uDirect Designer	No	uCreate Print Trial	Yes	No	Yes	No	No	No (optional)	Yes	Yes
uDirect Classic	Yes	uCreate Print Standard	Yes	No	Yes	Yes	No	No (optional)	Yes	Yes
uDirect Studio	Yes	uCreate Print Standard	Yes	No	Yes	Yes	No	Yes	Yes	Yes
uCreate Print Designer	Yes	uCreate Print Designer	Yes	Yes	Yes	No	Yes	No (optional)	Yes	Yes
uCreate Print	Yes	uCreate Print	Yes	Yes	Yes	Yes	Yes	No (optional)	Yes	Yes

## Platform requirements

Platform requirements are outlined at the end of this document.

It is the customer's responsibility to provide sufficient resources to the system, such as free disk space, database storage and memory. Falling too low on resources might result in system slowdown, failures and unexpected behavior.

## Skill-set requirements

Implementing PersonalEffect requires skill sets as outlined below. As a general statement, the degree of technical experience required is related to both design requirements and complexity of logic and business rules for individual campaigns. A significant amount of VDP design and implementation can be accomplished with intermediate level skills, but the higher degree of complexity for the design, business rules/logic, or data sources may require a greater degree of some skills.

You should not expect to offer very complex documents to your customers without taking the time to build or acquire these skill sets. This becomes a trade-off: the greater the skill sets of the operators, the more complex Dynamic Documents that can be created.

Training on non-XMPie products is a customer responsibility.

## Skill-set designations

Some of the skill sets described below are required for print operations within PersonalEffect, others are required for e-media operations – email, personalized Web and mobile – and some are appropriate for both. Some skills are necessary only for very advanced operations. These differences are noted in each skill-set heading with the following symbols.



Print-related skill-set



e-Media-related skill-set



Advanced operations skill-set

## InDesign

An intermediate level of design skills will make for a much more productive experience. From the technical perspective, an operator at this level will understand InDesign concepts such as Text/Object Frames, Layers, Master pages, Object styles, Paragraph styles, Character styles, page layout effects and clipping paths including setting attributes and other properties.

## Photoshop and/or Illustrator

ulmage integrates uCreate and uProduce with both Illustrator and Photoshop. Intermediate design skills are necessary to create ulmage document templates in either or both applications, depending on the types of ulmage generated graphics the customer plans to create. An operator of this level will have a good working knowledge of all Layer types and styles, Smart objects, Effects, Filters and be able to create/use actions.

## Data

To get started with variable data production a basic understanding of data and databases is necessary. Typically, your clients will send you a mailing list and perhaps other data in the form of Excel spreadsheets, and/or tab or comma delimited text files. These data sources are typically referred to as flat data files. Your operators will not only need to be able to open and work with these files, they may also need to understand how to handle mailing data. Simple understanding of how to work with data can be acquired during XMPie training, only if requested during the scheduling process.

Manipulation of data using text editors, MS Excel, MS Access or mail sorting applications such as CASS are not part of XMPie training. These are beginner level skills. The ability to accept and work with more advanced data sources, such as MS Access databases or query SQL servers would require more advanced data skill sets.

uProduce server automatically converts any file-based data source (CSV, MS Excel, MS Access, etc.) to a MS SQL data base. For campaigns with Web Touchpoints that have a complex database structure, or a large number of recipients, it is preferred to use a MS SQL database directly, or any server class database, such as Oracle or MySQL. While an in-depth understanding of this technology will be beneficial, the basic knowledge of converting flat data sources to SQL tables and working with SQL management tools is necessary. This type of training is not part of the XMPie training.

While a large number of customers are very comfortable with simple flat-file data sources, you will want to ensure that you acquire or build more advanced data skills before accepting or working with more complex data sources from your customers.

## Programming logic

The level of required skills is directly related to the type of variable data work you will be receiving from your customer. A large number of variable data logic requirements can be met with very basic skills. The most basic of skills necessary for this type of work can typically be acquired during the XMPie training sessions, if they don't already exist in your operation.

You will want to ensure that you acquire or build more advanced logic skills before accepting more complex work from your customers.

uCreate Print operators that need to implement logic or rules will do so by creating expressions using a drop-down menu dialog box called the Rule Editor. This editor writes expressions to calculate the end value of a Content Object. All expressions are written in XMPie's QLingo programming language. At the most basic level, QLingo is similar to creating formulas and using functions in MS Excel. With the Rule Editor, operators may also edit the QLingo expressions directly as needed.

uPlan operators require an intermediate to advanced level of programming skills. uPlan contains wizards and QLingo templates to help quickly build expressions, however QLingo is a sophisticated language and will allow for very complex JavaScript type scripting. Advanced data extraction rules will be created using SQL and QLingo. SQL programming skills are strongly suggested for very complex projects. Within uPlan, JavaScript user-defined functions can be created provided your operators have these skills. The most basic of skills necessary to program with uPlan can typically be acquired during the on-site training session if they don't already exist in your operation.

Data and programming skills usually go hand-in-hand; the more complex the project or campaign, the higher the skill level required to work with the data. You will want to ensure that you acquire or build more advanced skills before accepting complex work from your clients.

## Web administration

Understanding of IP addresses, domains, FTP, firewalls, DMZ, LAN, security and load balancing is required.

## Web development

If the websites originate from an external source, such as purchased off-the-shelf templates or from a 3rd party web development company, and moderate personalization is needed, basic HTML knowledge would typically suffice.

To create a website from scratch, HTML, CSS, and sometimes JavaScript skills are needed. To create mobile websites, responsive web design knowledge is required.

Some web development and personalization, especially of more advanced nature, would require JavaScript knowledge, and preferably AngularJS knowledge.

The better the web developments skills are, the more sophisticated the website can be.

Virtually any development environment can be used, including Notepad++, Visual Studio, and WebStorm.

Since XMPie web development is just an add-on to standard web development, web developer skilled in standard (static) web development can easily be leveraged to personalized web development.

## Email

Creating personalized email communications will require an understanding of the email domain including how to design email to appear correctly in different email clients and how to plan and design it to ensure good deliverability. For all but simple email design and logic, either Dreamweaver design skills or HTML/CSS design skills are required.

## .Net programming

Development of custom applications with the XMPie API set depends on web and application development programming skills. Customers desiring custom application development using the .Net programming environment will require advanced programming skills in Microsoft .Net coding, Web Service API and XML, as well as an understanding of Web Services.

## Timeframe from purchase to live application

In the XMPie training course attendees will build a simple working VDP job. Because this is a training exercise, all of the necessary elements will be in place. Training does not include the creation of a live job. The creation of a live job for a current customer will be dependent upon having all of the campaign components necessary and the complexity of the campaign. The XMPie work necessary to build a VDP application or campaign from a basic flat-file data source with minimum programming logic can happen relatively quickly – in fact, the real limiting factor will not be the XMPie work required, but the time it takes to accomplish the design requirements within InDesign. Complex VDP applications and campaign timeframe depend on the campaign itself and your growing skills with the XMPie software.

## Fault-tolerant configurations

Customers that are interested in a High Availability (HA) system with no single point of failure should have all the necessary HA infrastructure components, such as Microsoft Cluster (SQL Cluster) as well as a fail-safe central storage solution.

It is the responsibility of the customer to purchase, install and maintain this infrastructure.

## Training

PersonalEffect minimal training is two-and-a-half days of onsite training. However, extra training time may be required depending on the type of PersonalEffect environment you've purchased and the number and types of add-on products. At the end of those sessions, attendees will have completed a series of variable data applications, experience the server-side interfaces, and should be ready to execute an application similar to the complexity of the training materials. API use and programming are part of Professional Service offerings.



## Support and maintenance

PersonalEffect is supported for customers under a current Support and Maintenance agreement through Xerox. As a maintenance and support plan customer you will have full access to the Xerox help desk and free product upgrades. The help desk is intended to provide problem resolution for system errors and software faults. For user error resolution, workflow development and optimization for campaign and job creation the help desk can assist in engaging Professional Services.

Note that normal Windows server maintenance tasks such as backups, installation of updates, and MS SQL server maintenance tasks should be performed regularly by the customer.

## Plug-in connections to third parties

Support for third party software or services is limited to insuring successful uProduce and/or uStore connectivity to the software/services. XMPie does not support issues associated with these third-party services. The customer is responsible for establishing any business accounts required to connect XMPie to third-party software/services.

## Extended services

XMPie provides extended services for customers whose needs exceed the operability and functionality help covered by the Support and Maintenance plan. These services are:

**Professional Services** include application development, programming services, color consultation, implementation services, web development and design services and more. Programming services may also include the training and support or use of the XMPie APIs. Other Professional Services work may include error resolution, workflow development and optimization for campaign and job creation.

**Application Services** provide XMPie customers with a tailor-made implementation strategy and service to successfully start working with their XMPie software. By using best practices within the industry, Application Services can help customers to identify where they want to go with the software and help them take their first steps. In addition, they can implement sophisticated projects, plan workflows, mark decision-points, develop custom configurations, or even supply visual and creative campaign elements.



# Hardware and software requirements

XMPie desktop products will always support a minimum of two latest Adobe CC versions.

All Adobe Creative Cloud desktop applications (InDesign, Photoshop, Illustrator) require an active Internet connection, due to Adobe's subscription-based licensing model.

## Desktop products

### PC workstation – uCreate Print, uPlan

<b>Processor</b>	Intel Core i3 or later
<b>Memory</b>	16 GB RAM or more
<b>Video Card</b>	If ulmage is used: <ul style="list-style-type: none"><li>• 4 GB or greater of video RAM</li><li>• Screen resolution: 1280 x 800 or higher</li><li>• XMPie recommends you have a graphics processor (GPU) certified by Adobe. For a list of certified cards, see <a href="#">Photoshop graphics processor (GPU) card FAQ</a></li></ul>
<b>Disk Storage</b>	250 GB (SSD)
<b>Network</b>	Gigabit Ethernet adapter
<b>Operating System</b>	Windows 10 Pro Edition
<b>3rd-Party Software</b>	For uCreate Print: <ul style="list-style-type: none"><li>• Adobe InDesign CC-2020/CC-2021</li></ul> If ulmage is used: <ul style="list-style-type: none"><li>• Adobe Photoshop CC-2020/CC-2021</li><li>• Adobe Illustrator CC-2020/CC-2021</li></ul>

### Macintosh workstation – uCreate Print

<b>Processor</b>	Intel 2.0 GHz
<b>Memory</b>	16 GB RAM or more
<b>Video Card</b>	If ulmage is used: <ul style="list-style-type: none"><li>• 4 GB or greater of video RAM</li><li>• Screen resolution: 1280 x 800 or higher</li><li>• XMPie recommends you have a graphics processor (GPU) certified by Adobe. For a list of certified cards, see <a href="#">Photoshop graphics processor (GPU) card FAQ</a></li></ul>
<b>Disk Storage</b>	250 GB
<b>Network</b>	Gigabit Ethernet adapter
<b>Operating System</b>	macOS 10.15 (Catalina), 11 (Big Sur)
<b>3rd-Party Software</b>	For uCreate Print: <ul style="list-style-type: none"><li>• Adobe InDesign CC-2020/CC-2021</li></ul> If ulmage is used: <ul style="list-style-type: none"><li>• Adobe Photoshop CC-2020/CC-2021</li><li>• Adobe Illustrator CC-2020/CC-2021</li></ul>

## Server solutions

### Turn-key systems

#### uProduce turn-key system

<b>Processor<sup>(1)</sup></b>	Intel Xeon Series Gold or Platinum: <ul style="list-style-type: none"> <li>• Base Frequency of 3.4 GHz or more</li> <li>• Number of Cores – 4</li> <li>• Number of Threads – 8</li> </ul>
<b>Memory</b>	20 GB RAM or more <sup>(1)</sup>
<b>Disk Storage</b>	Two hard drives (SSD) in RAID 1 (mirroring) configuration with two partitions: <ul style="list-style-type: none"> <li>• Partition C: Operating system (~160GB)</li> <li>• Partition D: (~840 GB) For XMPie applications and job storage</li> </ul>
<b>Network</b>	Gigabit Ethernet adapter
<b>Operating System<sup>(2)</sup></b>	Windows Server 2019 Standard Edition
<b>Additional Software</b>	<ul style="list-style-type: none"> <li>• Adobe InDesign Server CC-2020/CC-2021 (provided by XMPie for customers current on Maintenance and Support)<sup>(3)</sup></li> <li>• Microsoft SQL Server 2019</li> </ul>

(1) Each InDesign composition instance requires 4 GB RAM and 1 CPU Core. Due to operating system and hardware limitations, the maximum number of composition instances per server is 16.

(2) All machines on which PersonalEffect System is installed must run on the same operating system. A combination of different operating systems is not supported.

(3) For Pro editions only. Adobe InDesign Server CC-2021 and above are provided by Adobe on an annual subscription basis. Customers must remain current on XMPie Maintenance and Support in order to continue use of the InDesign Server.

#### ulmage Processing Unit (UPU, UPPU)<sup>(1)</sup>

It is the customer's responsibility to obtain a Photoshop or/and Illustrator license from Adobe. Now that Adobe offers only a subscription-based license, XMPie can no longer provide Adobe licenses.

<b>Processor</b>	Intel Core i7 or faster processor
<b>Memory</b>	16 GB RAM or more
<b>Video Card</b>	<ul style="list-style-type: none"> <li>• 4 GB or greater of video RAM</li> <li>• Screen resolution: 1280 x 800 or higher</li> <li>• XMPie recommends you have a graphics processor (GPU) certified by Adobe. For a list of certified cards, see <a href="#">Photoshop graphics processor (GPU) card FAQ</a></li> </ul>
<b>Disk Storage</b>	250 GB (SSD)
<b>Network</b>	Gigabit Ethernet adapter
<b>Operating System</b>	<ul style="list-style-type: none"> <li>• Windows Server 2019 Standard Edition</li> <li>• Windows 10 Pro Edition</li> </ul>
<b>3rd-Party Software</b>	<ul style="list-style-type: none"> <li>• Adobe Photoshop CC-2021</li> <li>• Adobe Illustrator CC-2021 (for UPU only)</li> </ul>

(1) ulmage Processing Unit (UPU), ulmage Photoshop Processing Unit (UPPU).

## Enterprise platforms

### uProduce Director<sup>(1)</sup>

<b>Processor</b>	Intel Xeon Series Gold or Platinum: <ul style="list-style-type: none"><li>• Base Frequency of 3.4 GHz or more</li><li>• Number of Cores – 4</li><li>• Number of Threads – 8</li></ul>
<b>Memory</b>	16 GB RAM or more
<b>Disk Storage</b>	Two hard drives in RAID 1 (mirroring) configuration, 1TB (SSD) each, with two partitions: <ul style="list-style-type: none"><li>• Partition C: Operating system (~160 GB)</li><li>• Partition D: (~840 GB)</li></ul>
<b>Network</b>	Gigabit Ethernet adapter
<b>Operating System<sup>(2)</sup></b>	Windows Server 2019 Standard Edition
<b>SQL Server</b>	Microsoft SQL Server 2019

(1) It is advisable to extend the environment to reach higher availability.

(2) All machines on which PersonalEffect System is installed must run on the same operating system. A combination of different operating systems is not supported.

### uProduce Extension Server<sup>(1)</sup>

<b>Processor<sup>(2)</sup></b>	Intel Xeon Series Gold or Platinum: <ul style="list-style-type: none"><li>• Base Frequency of 3.4 GHz or more</li><li>• Number of Cores – 8</li><li>• Number of Threads – 8</li></ul>
<b>Memory</b>	32 GB RAM or more <sup>(2)</sup>
<b>Disk Storage</b>	2 Hard Drives in RAID 0 (striping) configuration, 1 TB (SSD) each, with two partitions: <ul style="list-style-type: none"><li>• Partition C: Operating system (~160 GB)</li><li>• Partition D: (~840 GB)</li></ul>
<b>Network</b>	Gigabit Ethernet adapter
<b>Operating System<sup>(3)</sup></b>	Windows Server 2019 Standard Edition
<b>Adobe Software</b>	Adobe InDesign Server CC-2020/CC-2021 (provided by XMPie for customers current on Maintenance and Support)

(1) It is advisable to extend the environment to reach higher availability.

(2) Each InDesign composition instance requires 4 GB RAM and 1 CPU Core. Due to operating system and hardware limitations, the maximum number of composition instances per server is 16.

(3) All machines on which PersonalEffect System is installed must run on the same operating system. A combination of different operating systems is not supported.

## XMPL server<sup>(1)</sup>

<b>Processor</b>	One physical Quad-Core Intel Xeon
<b>Memory</b>	8 GB RAM or more
<b>Primary Hard Drive</b>	250 GB
<b>Secondary Hard Drive</b>	250 GB
<b>Disk Storage</b>	<ul style="list-style-type: none"><li>• Two hard drives in RAID 1 (mirroring) configuration with two partitions:</li><li>• Partition C: Operating system (~80 GB)</li><li>• Partition D: (~150 GB) For XMPie applications and websites</li></ul>
<b>Network</b>	Gigabit Ethernet adapter
<b>Operating System</b>	Windows Server 2019 Standard Edition

<sup>(1)</sup> A server which is used for XMPie server applications is a dedicated server. No other software or web applications should be installed.

## Marketing Console (Analytics)

Marketing Console can be installed as part of the Server solutions.

<b>Processor</b>	Intel Xeon Series Gold or Platinum: <ul style="list-style-type: none"><li>• Base Frequency of 3.4 GHz or more</li><li>• Number of Cores – 4</li><li>• Number of Threads – 8</li></ul>
<b>Memory</b>	16 GB RAM or more
<b>Primary Hard Drive</b>	500 GB (SSD)
<b>Network</b>	Gigabit Ethernet adapter
<b>Operating System<sup>(1)</sup></b>	Windows Server 2019 Standard Edition
<b>Additional Software</b>	Microsoft SQL Server 2019

<sup>(1)</sup> All machines on which PersonalEffect System is installed must run on the same operating system. A combination of different operating systems is not supported.