Pageflex® 8.6.2 ReadMe

I. Overview

Pageflex 8.6 comprises the group of Pageflex applications producing dynamic variable data projects. The various feature sets within this application suite—Storefront, Campaign Manager, .EDIT, and Server—are enabled based on your software license key. Your license also determines the range of output formats available to you.

II. System Requirements

Pageflex Server Hardware

- 64-bit Intel-compatible server-class CPU
- 16 GB RAM or more
- 30 GB high-performance storage for programs, database, and initial output
- One hardware dongle with embedded license key numbers (provided with software)
- One free USB port (for dongle)
- T1 or better Internet connection

Pageflex Server Software

- Standard or Enterprise Editions of Microsoft Windows Server 2012 R2, or Server 2008 R2*
- Microsoft SQL Server 2014, SQL Server 2012 SP2, or SQL Server 2008 R2**
- Microsoft Message Queuing (MSMQ)
- Internet Information Services (IIS) (for all hosts running web applications)
- Microsoft .NET 4.5.2 or higher†
- Microsoft IIS URL Rewrite Module 2.0 (for Campaign Manager), included

* Development, staging, and test servers may use Pro or Enterprise Editions of Windows 7, 8, or 8.1.

** If installing SQL Server on the same machine as Pageflex, a secondary hard drive for database storage and an additional 8 GB RAM are required.

† Pageflex remains a .NET 4.0 application, however, so developers of Storefront DLL extensions should not attempt to take advantage of any .NET capabilities that postdate 4.0. (SOAP extensions, on the other hand, can be .NET 4.5 applications.)

Web Browser‡

- Microsoft Internet Explorer (IE) 10 to 11
- Firefox 38 to 45 (Windows versions only for Java/Java .EDIT and Storefront Free Edit)
- Safari 6 to 9
- Chrome 40 to 49 (only through Chrome 44 for Java/Java .EDIT and Storefront Free Edit)

‡ The Java versions of the .EDIT and Storefront Free Edit clients require the Java plugin from Oracle. Browsers that have discontinued support of this plugin may be targeted with the alternative Flash client instead.

Pageflex Studio

- 4 GB RAM
- True Color video card and 24-bit or better display settings
- 2 GB disk space (for program files)
- Microsoft Windows 8.x; Windows 7; Windows Server 2012 R2; Windows Server 2008 R2§
- Microsoft .NET 4.0 or higher

§ Pageflex Studio can run on a 64-bit Windows Server, but it does so as a 32-bit application.

III. How to Upgrade

Existing Pageflex owners: Note changes to system requirements *before* upgrading

System requirements for 8.6.x have changed with respect to the minimum necessary RAM, .NET, and browser support. They have changed even more extensively for anyone upgrading from before PF8.0. Please examine the System Requirements above for the full list of essential hardware and software before continuing.

If you are already a Pageflex customer, there are different upgrade paths to version 8.6.2, depending on what capabilities you have licensed. Click on the appropriate link below to open a PDF document that will assist you in upgrading.

Pageflex Server Customers
Complete upgrade instructions for Server-only customers are found in the document Pageflex Server 8.6.2 Upgrade Guide.

Pageflex Storefront Customers
Storefront deployers will find complete upgrade instructions in the Pageflex Storefront 8.6.2 Upgrade Guide.

Pageflex Campaign Manager
Pageflex Campaign Manager customers should read the Pageflex Campaign Manager 8.6.2 Upgrade Guide for instructions.

Once you have completely followed the instructions contained in the relevant upgrade guide, you may skip the following section and proceed straight to Section V, What's New.

IV. How to Install

Preparing your machine

If installing Pageflex software for the first time, please review the System Requirements above. PDFs of every user guides and reference manual cited below will be installed with Pageflex 8.6.2.

1) Operating system

Begin with a default installation of the Microsoft operating system. Modifying the OS prior to installing Pageflex software may result in difficult-to-diagnose operational problems later. In particular you should refrain from applying corporate security policies to a server machine intended for Pageflex use until after completing the Pageflex installation. Only after verifying the operability of the Pageflex software should you proceed to add security policies a few at a time, keeping record of the sequence in which they are applied, so that it is possible to identify any that interferes with Pageflex's intended functionality.

2) Internet Information Services (IIS), URL Rewrite Module, and Microsoft Message Queuing (MSMQ)

These components may or may not be required depending on how the computer running the Pageflex applications will be used.

- **IIS** is required for all machines running Pageflex-related web applications. It need not be installed on non-web-server engine-only hosts, or machines dedicated only to running Studio, or functioning solely as a license server. Note, launching the Pageflex Web Samples (Start > All Programs > Pageflex > Server 8.6 > Samples) on any machine without IIS will incur a warning, which may be ignored.

- **URL Rewrite Module** is required for all IIS web servers running Pageflex Campaign Manager. Pageflex redistributes the relevant installer package (rewrite_2.0_rtw_x64.msi) in the Setup folder on the installation disk image.

- **MSMQ** is required on all machines running Pageflex Server-based applications, including Storefront and Campaign Manager. A standard installation is required.

Detailed instructions for configuring these components within Windows Server are found in the Article 1545, "Adding Pageflex-required Roles and Features to Windows Server" on the Support website. If you are current on your maintenance contract and do not yet have online access to the Support site, send a request for an account to support@pageflex.com.

3) SQL host

You must designate a machine to function as the database server for the Pageflex Server cluster—and for Storefront and Campaign Manager deployment databases, if applicable. Step-by-step guides for setting up and configuring each supported version of SQL host to work with Pageflex are found in Article 1439, "Installing SQL Server for use with Pageflex," on the Support website.

4) Email server

Access to an SMTP email server is required for Pageflex Storefront email notifications and for sending HTML Email products or campaigns from any Pageflex application.

5) Editing the Windows hosts file

The default hosts file found on every installation of Windows must be modified to associate "localhost" with the "127.0.0.1" IP address. This modification is most critical for multi-machine Pageflex clusters, but substantially improves the software performance of mono-host installations as well.

To perform the required edit, go to C:\Windows\System32\drivers\etc and open the hosts file in a text editor. The last lines of the file will read as follows:

```
#    localhost name resolution is handled within DNS itself.
#    127.0.0.1       localhost
#    ::1             localhost
```

Uncomment the line with localhost by deleting the pound sign/hashtag/octothorp, like so:

```
#    localhost name resolution is handled within DNS itself.
     127.0.0.1       localhost
#    ::1             localhost
```

Save and close the file.

Notes on SQL Server Express

Please note that production environments should use the full SQL Server. However, for development, test, or staging computers you can use Microsoft's free version of SQL Server Express. Enter "sql server 2014 express download" in your favorite Internet search engine to locate Microsoft's current official download site.

If you plan to use SQL Server Express, be sure to also download and install the free management tool, SQL Server Management Studio (downloadable on its own or bundled with SQL Server Express with Advanced Services), to manage your databases.

Installing Pageflex Server

After downloading and unzipping the version 8.6.2 disk image, double-click on Setup.exe in the root directory.

Click on "Licensing Hardware Key Drivers" to install the dongle drivers required for licensing. After this is complete, click on "Pageflex Server 8.6.2 Applications". The Wizard will proceed to guide you through all the steps necessary to install the software.

Note: the second step in the Wizard defaults to installing the Pageflex applications in the C:\Pageflex directory. You may change the location to suit your environment, but DO NOT install to the C:\Program Files directory due to permission restrictions specific to that folder which will thoroughly and intractably compromise operation of Pageflex software.

> If .NET is not yet installed on your machine, it will be installed and configured for you. While this happens the install process may appear frozen; after a few minutes, however, it will resume. Installation of .NET must *not* be interrupted.

When the process has finished, you can move on to either setting up Server for Storefront, Campaign Manager, or for Server-only jobs and transactions. You should also have your USB dongle available, programmed with your unique alphanumeric license key.

See the *Pageflex Server Guide* for an illustrated version of Server setup and configuration.

Pageflex Server Setup for Storefront and Campaign Manager

The *Pageflex Storefront Deployer Guide* contains detailed information about setting up Pageflex Server for Storefront. The process for configuring Pageflex Server for campaigns—which is similar to that for Storefront, including steps for configuring licensing and initializing the Pageflex Server—is thoroughly detailed in the *Pageflex Campaign Manager Guide*.

Pageflex Server Setup for using Studio ID projects

If you are planning to work with InDesign projects in Storefront or Server you must first install a licensed copy of the Adobe InDesign CS6.x Server and the Pageflex Server ID Plug-in. Instructions for both installers are provided in the ReadMe for the Server ID Plug-in.

Setup for Server-only configurations

If your Pageflex licensing is for Server-only configurations, please refer to chapters 3 and 4 of the *Pageflex Server Guide* for details on Server setup and configuration. Once you have installed your Server software, launch the Licensing Administrator from Start > Programs > Pageflex > Server 8.6 > Licensing Administrator. In this application, you will be prompted to identify your license server and to plug in your USB dongle, programmed with the appropriate version 8 license key.

Once licensing is configured, run Start > Programs > Pageflex > Server 8.6 > Server Administrator. The first time you launch this application, the database connection wizard will prompt you to establish and connect with a SQL Server database. This database is referred to as your Server "cluster" database, and is distinct from the databases that Storefront or Campaign Manager creates for deployments. Once you have established the cluster database, the Server Administrator application will be launched, and you can begin configuring Server.
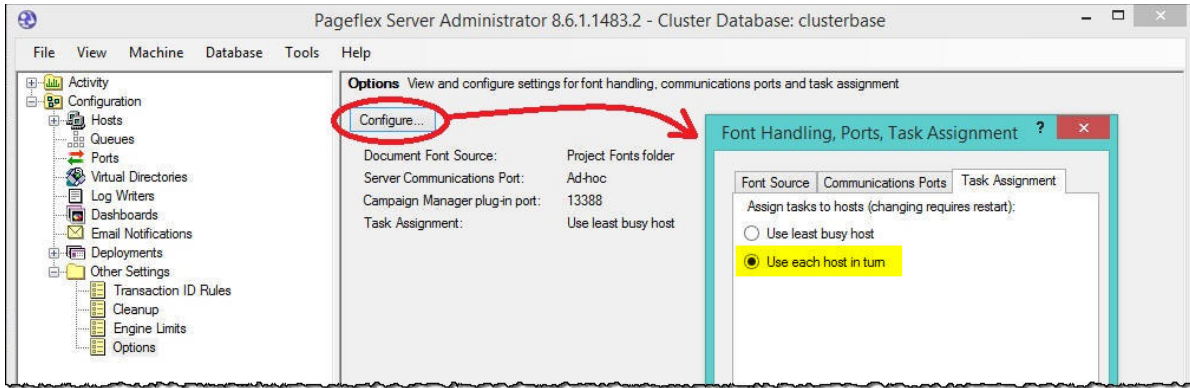
V.   What's New

This section describes features and enhancements in PF8.6. Documentation files have been updated for all new features, so for details please use the Start menu or App category shortcuts to view the relevant PDFs installed in the Pageflex\Server\Doc folder.

1.   Performance improvements

The 8.6 release is primarily dedicated to the intangible yet very perceptible issue of saving time. All Pageflex owners will notice the improvement to our "in-place" cluster database upgrade process that results in faster upgrades from past versions. And Pageflex Storefront owners—and end users!—will notice faster load times for pages that previously were most susceptible to slowness when laden with large quantities of data. This translates into faster-loading catalog landing pages, search results, and order history, along with a zippier experience overall on sites that have large quantities of products, users, groups, or any combination of those three.

This release also introduces a new option for configuring how Pageflex Server (and hence all Server-equipped products, such as Storefront and Campaign Manager) assigns tasks to Pageflex engine hosts within a cluster. Before 8.6 the Server application would monitor all hosts to detect which was least busy, and assign new tasks to that machine. Now in addition to the default "Use least busy host" option there is a new "Use each host in turn" round-robin method:
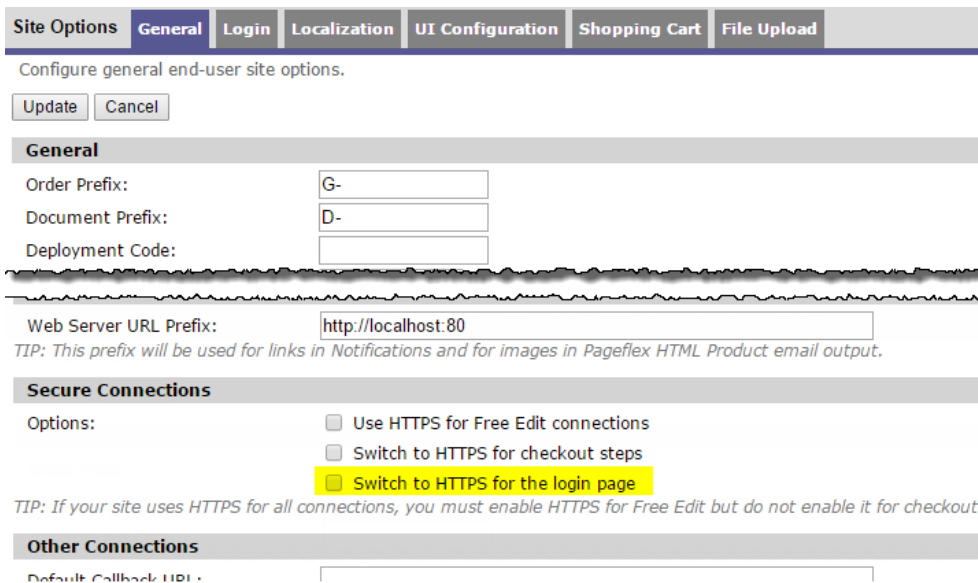
Determining whether your cluster is one that will process jobs more rapidly across its hosts with round-robin task assignment is a matter of empirical evaluation. As a guideline our expectation is that the performance improvement will be most evident in clusters that process a preponderance of short tasks, such as single-record, single-page jobs.

2. Storefront: New "Campaigns" and "Campaign Details" pages

A new "Campaigns" tab may be added to the top-level site navigation bar for Storefronts that are integrated with Pageflex Campaign Manager. (The privilege to see this tab must be assigned via the new "Who sees their ordered campaigns?" permission at the bottom of the User Access page.) Campaign products originating in Campaign Manager and ordered from within Storefront will continue to be included within a user's complete order history, but this new tab provides a direct view just of ordered campaigns. Furthermore each ordered campaign now links to a new Campaign Details page that replaces the Tracking Site link in previous versions.

3. Storefront: Allow login page to use secure connection

To better support the PCI compliance requirements governing security of websites that process credit cards, a new Site Option for discreetly restricting the Login.aspx page to be served via HTTPS has been added to the "Secure Connections" section of the General tab:

PCI-compliant deployers should switch this on in conjunction with switching on HTTPS for checkout steps.

4.   Storefront: Archived users included in user reports

Now in 8.6 any downloaded CSV of user accounts and their selected data fields will include accounts that were archived.

VI. Bug Fixes

Pageflex 8.6 includes various fixes to defects reported by customers. A complete list is available on the Support website as part of the Article 1494, "Bug fixes in Pageflex software."

VII. Known Issues

New known issues that have arisen since our last 8.5.x release are listed below. Known issues and requirements of past releases that continue to be relevant to version 8.6 are documented on the Support website as part of Article 1311, "Known Issues in Pageflex software."

- When web-based services upgrade their minimum requirements governing secure connections with clients, those clients may then be rejected when making requests to connect with those services. If the client in question is the host computer on which Pageflex Storefront runs and the web-based service is UPS or PayPal, this rejection takes the form of a failure within Storefront—for instance, the disappearance of UPS delivery methods from the list displayed to ordering users, or the inability to turn on a payment extension. Corresponding "Could not create SSL/TLS secure channel" errors will be found within the Storefront logs. By far the simplest and fastest solution is to update the host computer's default security protocol. For a step-by-step guide to how to do this, see Article 1570, "Changes to PayPal (and UPS) security protocols," on our Support website.

- The Chrome browser dropped support for Oracle's Java plugin with the release of Chrome 45. Owners of .EDIT and Storefront Free Edit must either switch to using the Flash-based editing client or insert a message in the web page in which the editing client window appears advising anyone landing on the page that it will not work in Chrome.

VIII. Also Included

Logo-free .jar file for Online Design and Edit

A version of the signed .EDIT/Free Edit .jar file without the Pageflex logo is available in the JAR subdirectory of the Pageflex InstallKit directory.

Thank you for choosing Pageflex!

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