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Xerox early customer engagement process and documentation

Carmen Bottini

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XEROX EARLY CUSTOMER ENGAGEMENT PROCESS AND DOCUMENTATION

By

Carmen A. Bottini

Submitted to the Faculty of RIT
In Fulfillment of the requirements
For the Degree of Master of Science
In Service Quality Management

October, 1999
ABSTRACT

This paper focused on the Early Customer Engagement (ECE/ECAT) activity that should be utilized for every new product that Xerox develops. ECE is the practice of allowing a few of Xerox more “friendly” accounts to test a product before it launched to the general public. Although the ECE practice has been in utilized for some time, a standardized process and corresponding documentation did not exist. Because of this, there has been ECE Tests that have received unfavorable grades from participants even though the actual Xerox product was satisfactory. The use of this documentation will allow Xerox to streamline the activity needed to run a successful ECE Test. It is only fair to state that previous employees working in this area contributed to some of the information in this paper. The review of these earlier pieces of literature was essential in the creation of this output.
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Introduction

Before an external customer release of new software or hardware can occur, an Early Customer Engagement / Early Customer Acceptance Test will be performed. This test, and the results received from the customers, will be used in the Launch Go/Wait decision during the 3.4 TTM review.

This ECE/ECAT should demonstrate that the new product and its corresponding support strategies are launch ready. Although the product has gone through numerous internal tests, these internal tests will surely miss many customer scenarios that could expose some problems. The external tests that will be performed during ECAT will attempt to prove that the new hardware/software will meet customer expectations when announced to the general public.

These external tests will also give the support functions the ability to prove that their processes are launch capable. External customers will utilize the Xerox software and hardware hotlines during ECAT. Also, all of the internal support teams will be required to support these tests.

At the conclusion of the test, surveys will be given to the customers so they can judge the product as well as the Xerox support functions utilized during the test. These results will be brought into the Launch Go/Wait decision. Positive results will drive the decision to go forward with launch.

The ECAT/ECE Manager will be responsible for the daily management of these tests. This person will be responsible for all facets of the test. The ECE/ECAT Manager should be familiar with all of the Xerox support functions, which includes Xerox hotlines and Xerox internal support teams. The ECE/ECAT
Manager should also be familiar with the product that is in test. By no means, does the person need to be a subject matter expert. However, a working knowledge of the product will greatly aid the manager in dealing with the external customers.

The document will describe the step-by-step procedures that need to be completed to ensure a successful "Early Customer Engagement Test (ECAT)". Although every ECAT is different: some testing hardware only, some software only, some testing hardware and software, there are fundamental processes that should be utilized for each test.

Although this document will include the major steps to be taken by the ECAT Manager, there are numerous other steps that will have to be done for each test. Common sense and good judgement should be utilized when these steps occur.

**Background**

The practice of ECE/ECAT has been a part of the Xerox way of business for years. Xerox does extensive testing on all hardware and software before introducing a product to the field. However, all the internal testing in the world cannot duplicate every external environment. Customers will certainly run different workflows that may capture an unknown problem. These problems may not be encountered in the internal tests that Xerox runs. Some of these problems may only be seen at a customer site. Therefore, it is essential to run these customer tests to ensure that every precaution is taken when Xerox introduces a new offering. These tests are also used to create a "word of mouth" statement regarding future products.
Problem Statement

Xerox introduces numerous new products per year. Some are hardware specific, some software specific, and some a combination of both. In recent years, Xerox has also introduced many color products on top of the black & white offerings. Most of these new products will go through an ECE/ECAT test. However, because of the different people managing these tests throughout the different Xerox divisions, there was never a complete and standard test process. Because of this, many tests can been run inefficiently and contribute to unsatisfactory “end of test” survey results.

Purpose

This project will layout the entire step-by-step process that should be carried out by the ECAT Manager. It will also include all documentation and forms needed to ensure that any question regarding the test will be answered. Following this process will greatly aid in the ECAT Manager running a proper and efficient test.

Significance

Xerox and many other companies run external customer tests to ensure that new products are greeted with open hearts and wallets. Many of the early buzz about these products are driven by the customers who are included in these tests. These customers will be the outside “sales force” for these products. Therefore, it is essential that these tests are run correctly and that all customer concerns are driven to closure. This project, if followed, will ensure that the ECE/ECAT Manager does everything possible to ensure this happens.
CHAPTER II: Early Customer Engagement Process

This process will go over every step that the ECE/ECAT Manager should complete for the test. It will start with the initial step, participation in various program meetings, and continue until the end of test functions.

MEETING ATTENDANCE

The ECAT Manager should have constant participation in Program and Launch meetings for any product that is getting close to external test status. In general, any product that is getting ready for a 3.2 TTM exit should have an ECAT schedule and should get some time on meeting agendas. The ECAT Manager is responsible to bring any questions or concerns regarding ECAT to these meetings so group discussions can take place. Once ECAT has begun, an ECE PDT issue slide and Problem List (Appendix A) should be distributed and discussed (more detail on this subject is later in the document).

ECE TEST PLAN

For every test, an ECE Test Plan (Appendix B) should be created by the Test Manager and have Program Team approval for the TTM 3.2 Exit Review. This Test Plan will include a quick overview of the hardware/software that is to be tested. This overview should include most of the new functionality of the product. The Plan should also include the following: the size of the test, a general overview of the test, customer selection process, test management and schedule, field roles and training, and a test enabler checklist (a separate write-
up on the enabler checklist is later in the document). The test plan should also include all of the Xerox support functions and associate a name with each function. Any individual mentioned in the plan needs to give approval for the plan to take effect.

This test plan should also include the fact that if hardware is needed, it is the CBU's responsibility to purchase the equipment. The Program Team will not fund this expense unless upper management directs it to. After the test is completed, the customer has the option to buy the machine or have it returned to the CBU.

**SITE SELECTION**

For any ECAT to be successful, one of the most important steps to undertake is the selection of the external sites. It is imperative that the sites are extremely "Xerox Friendly". A site that has a good track record with previous ECAT activity should be placed high on any candidate list. Also, choosing a CBU that has a vested interest in the product that is being tested is also important when selecting sites.

Starting with the DigiPath 2.0 ECAT, a new site selection process was introduced. This process put a greater emphasis on the field to choose or nominate sites that they felt would be ideal candidates for the test. The field will be given an "ECE Nomination Package" (**Appendix C**) that is to be filled out for any customer that would like to be chosen as an ECAT site. This package requires a sales rep or analyst to describe the sites work-flow, equipment, personnel, and new features that that the site is willing to test. Once this form is completed, it should be sent to the test manager.
The test manager is responsible to pull together a meeting to choose which nominated sites should become an ECAT partner. This meeting should absolutely include the following functional players: Launch Manager, Program Manager, ECAT Manager, Marketing Manager, MRSO member, USCO Launch Manager, and the USCO Customer & Service Support Manager. Other Program Team members who would like to be included in the process are welcomed. The members of this meeting should go over each nomination package and choose the sites that will test all the new features and give proper feedback. Once the sites are selected, the Test Manager should notify the CBU’s that support these sites. The manager should work with these CBU’s to ensure that the sites know when the test will occur. Also, all logistics of the test should be given to the CBU so they can manage the manpower and resources needed to support it. These communications are important so that a working relationship can be established before the test begins.

At the time of site selection, it would be prudent for the ECAT Test Manager to create a “new feature checklist” (Appendix D). The manager should utilize the field personnel to fill out the checklist. The completed checklist will show what features the perspective test sites will test. A good set of sites should be able to test every new feature of the tested product. This could be a great asset in choosing sites.

**TERMS AND CONDITIONS PROCESS**

After the site selection has been completed, the next major process is the creation and signing of the Terms and Conditions document (Appendix E). This
document should CLEARLY state what Xerox and the external customer are
responsible for during the test. It should state what site preparation, if any, the
customer must complete before the equipment gets placed. It should also state
what feedback Xerox requires from the customer during the life of the test.
The T’s & C’s should also focus on the type of support Xerox is bound to provide.
It should state the hours of support and the vehicles for which this support will be
provided. The T’s & C’s should also provide a list of hardware/software that will
be shipped to the site. It should also state what will happen to this
hardware/software after the test has completed.
The T’s & C’s should be mailed to the CBU personnel who will hand deliver the
document to the test site. Signatures will be collected from Xerox and third-party
sites, and the signed document should be forwarded back to the Test Manager.
No site will receive any hardware/software without a signed “Terms and
Conditions” document.

**ECAT ENabler Checklist, Engagement Criteria & Site List**

Before proceeding any further with ECAT functions, the ECAT Manager has to
make sure that the following three documents are created and adhered to when
required.
The above mentioned Test Enabler Checklist is found at the end of the ECAT
Test Plan. This document is very important because it will list all of the key test
deliverables that various functional teams need to produce. A name should be
associated with each functional team to ensure ownership of each deliverable.
This checklist should be brought into program meetings to ensure that no enabler
is dropped or forgotten. The completion of these deliverables is essential for a successful ECAT.

The Customer Engagement Criteria (Appendix F) will show the criteria in which the product and support functions have to be judged against before an external test can proceed. Some of these criteria will judge product performance, product reliability, customer documentation, customer training, hotline support, etc. All of the criteria should be in GREEN status before the beginning of ECAT. If not, exception criteria for the non-green specifications need to be produced and accepted by the Program Team.

The Customer Site List (Appendix G) will show the ECAT sites, addresses, contacts, and other pertinent information regarding the third party customer. It will also include all Xerox contacts inside the customers CBU. An up-to-date site list will prove extremely beneficial throughout the life of the test.

**CUSTOMER INFORMATION DOCUMENT PROCESS**

Prior to the beginning of any ECAT, a Customer Information Document (Appendix H) needs to be written by the Test Manager. This document should include all the information that the external site will need to be a productive test member. The Test Manager should go over this document with all of the ECAT sites prior to or at the beginning of the test.

In short, this document is the external version of the ECAT Test Plan. The document should start with the test objective, schedule, and other high-level test information.
The Customer Information Document should then include the high-level functionality of the hardware/software that is being tested. There is no need to go into the low-level functionality. The Customer Software Release Document created by GK&LS will cover this. However, it is imperative that the CID mentions the CSRD so the customer can reference the material.

The next part of the CID should give the customer all the contact information it will need to acquire Xerox hardware/software support. This is extremely important. Xerox should make it easy for the customer to contact support personnel and a properly written CID will enable this.

Lastly, the CID should clearly state what feedback Xerox expects from the customer. The CID should mention that there will be weekly conference calls between the Test Manager and site personnel. Also, it is imperative that the CID state that the Xerox Customer Support Center will be the one point of contact for all customer hardware/software problems. This is essential so that all of the proper call tracking is completed and proper support teams get involved to rectify problems.

**CUSTOMER SITE VISIT**

Just prior to test start or during the first week of the test, it is essential that the Test Manager make a personal visit to all test sites and corresponding CBU’s. This visit will be instrumental in creating a working relationship between Xerox and the ECAT site.

The Test Manager should make it a point to visit the CBU. This will give the CBU personnel the chance to ask questions about the test and to understand their
responsibility. The ECAT Manager should go over all the test logistics with the
district and to stress what an important part they will play in the test. It should be
stressed that the Xerox hotline should be used as the focal point for customer
problems. The relationship between the Test Manager and the field is essential
for positive test results.

The Test Manager should then make a visit the test site. At the site, the manager
should meet with everyone that will have a hand in the test. This will include all
decision-makers, operators, print shop supervisors, schedulers and others. The
Test Manager should go over in detail the Customer Information Document and
the Customer Software Release Document. These two documents should give
the customer a good understanding of the objectives of the test. Also, the test
manager will need to stress again that the Xerox Hotline is to be utilized for all
customer problems and concerns. At this meeting, a weekly conference call
should be scheduled between Xerox and the site. It is essential that there is an
agreed upon time and day for this call.

**WEEKLY CONFERENCE CALL PROCESS**

One of the most important functions of the Test Manager during ECAT is the
management and ownership of the weekly conference call. The Test Manager,
customer site personnel, and at least one CBU representative should attend this
call. The Test Manager can request any other party to attend if necessary. This
call is the main vehicle for customers to express their concerns, feelings, and
thoughts about the test and Xerox support.
This call should NOT be utilized as a “new customer problem” vehicle. That is the function of the Xerox Hotline. The call should be used to ask the customer if they have been receiving up-to-date responses on open issues. The test Manager should ask the customer if they have utilized the Xerox hotline in the past week. If so, it is important to get the log number for each call so that the Manager can oversee the call and ensure that it gets closed properly.

This call is very important because it gives Xerox a picture of how the product and support functions are proceeding for launch. The customer should be asked about the amount of work they are pushing through the equipment and to give feedback on their output. This call can also give the manager a feel for how the customer will respond to the end-of-test survey (to discuss later in document).

**PROBLEM TRACKING & PDT PRESENTATION**

Throughout the test, it should be stressed to the customer that any and all problems should be communicated to the Xerox hotline. This will ensure the proper support groups involvement to drive closure of the problem. It also ensures that the correct problem tracking will take place.

When a customer contacts the hotline, a problem log is assigned. This log will be tracked from start to finish by the Test Manager using the ECAT Problem List. This list will include the following: Customer Name, Log number, problem description, and corrective action taken. This list will be evergreen and should be updated throughout the life of the test. Every call that is associated with the product being tested should be tracked on this list. The Test Manager will need to
work with the hotline personnel to ensure that all calls from ECAT customers are tracked correctly.

This list should be distributed and discussed at every PDT and Launch meeting during the test. This will allow all problem calls to get exposure at program team meetings. This list will also be used during the weekly conference calls to make sure that customers are receiving correct support for each problem they have encountered.

One of the ECAT Manager's main roles throughout the test is to manage this list. All customer problems should be looked at weekly and the list should be updated to reflect any changes with problem recovery. The quicker problems can get closed, the greater the chance of receiving high scores on mid-test and end-of-test surveys.

**SURVEYS & RESULTS**

Although feedback is received from customers every week via the weekly conference calls, the program needs more concrete data regarding customer satisfaction. Therefore, it is necessary for the ECAT Manager to survey every customer regarding the test. This survey should be given at the end of test and sometimes, in the middle of the test.

The test survey (Appendix I) should ask the customer a question regarding every aspect of test. If a mid-test survey is given, the end-of-test survey should have the exact questions and format. There should be a question pertaining to the following topics: product satisfaction, hardware/software usability, service support, analyst support, hotline support, and training. There should also be
questions that specifically ask the customer how they feel about, “the products readiness to launch” and “overall satisfaction with Xerox throughout the test”. Answers should be given on a scale of 1 – 10 with 10 being “Extremely Satisfied”. Comments should be asked for and recorded.

Once the surveys are completed, the ECAT Manager will create a Test Survey Results document (Appendix J). This document will show the compiled results and comments from the test. All scores should be averaged based on the number of respondents that gave a response to each question (some customers may not give a response to a question if they did not utilize the questions ask). The customers should be shown individually so that problem points can be identified easily. These results should be shared with all Program meetings and will be utilized at Launch Go/Wait decisions. If a test is run correctly and the product is launch intent, all test scores should be very high. If results are low, the Program needs to assess the product readiness and take action before a Launch-Go decision is given.

**TEST-END FUNCTIONS**

When the test has been completed, the ECAT Manager has a few functions to complete to bring the test to closure. Any open problems on the problem list should be discussed with the customer and the hotline personnel involved. This will ensure that the problem isn’t lost after the test has stopped.

Also, the ECAT Manager should discuss and distribute a final problem list and End-Of-Test Survey to the Program Team. These two documents should be archived in case they are requested at a later date.
A follow-up call should be made to all accounts to ensure that everything is running smoothly. It should be relayed to the customers that they should continue to utilize the Xerox hotline for all problems. They should be made aware that now that the product is launched, the only escalation path for problems outside of their local CBU is the Hotline.

It is prudent to save contact names and any other customer information. As stated earlier, a customer that has been utilized in a previous ECAT should rank high on the candidate list for future tests. If the Test Manager can create an atmosphere of respect and support with the customer site, this site will be more than happy to test future products.
Appendix A:

ECE PDT Slide & Problem List
“Name of test here”

<table>
<thead>
<tr>
<th>Key Phase Deliverables</th>
<th>Plan</th>
<th>Outlook</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>BB2.0 ECAT Test Plan</td>
<td>9/21</td>
<td>9/21</td>
<td>C</td>
</tr>
<tr>
<td>Issue ECAT receivable checklist</td>
<td>11/16</td>
<td>1/4</td>
<td>C</td>
</tr>
<tr>
<td>ECAT Customer selection finalized</td>
<td>12/14</td>
<td>3/1</td>
<td>C</td>
</tr>
<tr>
<td>Customer Terms &amp; Conditions Signed</td>
<td>12/18</td>
<td>3/8</td>
<td>C</td>
</tr>
<tr>
<td>Issue Customer Information Document</td>
<td>1/8</td>
<td>3/19</td>
<td>C</td>
</tr>
<tr>
<td>ECAT Go/Wait Review</td>
<td>1/11</td>
<td>3/8</td>
<td>C</td>
</tr>
<tr>
<td>ECAT Installs Begin</td>
<td>1/18</td>
<td>W/o 3/15</td>
<td>C</td>
</tr>
<tr>
<td>Data collection process begins</td>
<td>1/25</td>
<td>W/o 3/22</td>
<td>C</td>
</tr>
<tr>
<td>Report Test Data to PMT during test period</td>
<td>ongoing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Upgrade to R9 s/w</td>
<td>W/o 5/17</td>
<td>W/o 5/17</td>
<td></td>
</tr>
<tr>
<td>Upgrade to R11 s/w</td>
<td>W/o 6/21</td>
<td>W/o 7/26</td>
<td></td>
</tr>
<tr>
<td>End of test surveys</td>
<td>W/o 3/8</td>
<td>W/o 8/16</td>
<td></td>
</tr>
<tr>
<td>Go/Wait Review / ECAT Test period ends</td>
<td>3/15</td>
<td>W/o 8/23</td>
<td></td>
</tr>
</tbody>
</table>

**KEY ISSUES AND ACTIONS**

List any issues, concerns, and actions that are related to ECAT Tests.

**KEY ACTIVITIES / NEXT STEPS**

List activities that are currently transpiring in the ECAT.
List next steps to be taken to alleviate the issues and concerns above.
### EXAMPLE OF ECAT PROBLEM LIST

<table>
<thead>
<tr>
<th>#</th>
<th>ICSS#</th>
<th>Date</th>
<th>Account</th>
<th>Description</th>
<th>Actions</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>List ICSS  log associated with problem.</td>
<td>The date that the customer called the Hotline.</td>
<td>Customer name</td>
<td>List entire problem description in as much detail as possible. Make sure to include job scenario, hardware/software, job description, etc. Also list any recovery tried by customer before hotline was utilized.</td>
<td>List all actions that the customer was given from Xerox, either by CBU personnel or the Hotline. This column should be evergreen until closure of the problem. If a SPAR was written, list this information here.</td>
<td>Status should either be OPEN or CLOSED.</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Note:* Each entry must be filled out completely and accurately to ensure the problem is resolved promptly and efficiently.
Appendix B:

ECE Test Plan
Product X External Customer Acceptance Test (ECAT) Test Plan
Approvals:

S. Egbert on file__________________________ Date ______
XXXXXXX 2.0 Delivery Manager

C. Hammer on file__________________________ Date ______
XXXXXXX Launch Manager

D. Dinh on file__________________________ Date ______
Product Marketing Manager

B. Hardy on file__________________________ Date ______
Customer & Service Support Manager

M. Mihalenko on file__________________________ Date ______
MC&SE Service Documentation & Training Manager & (Customer Education)

C. Durnin ________________________________ Date ______
NASG-Canada Launch/ECAT Manager

B. Turner on file__________________________ Date ______
XE Product/ECAT Manager

M. Paez ________________________________ Date ______
AO Launch Manager

K. Webb on file__________________________ Date ______
NASG-US Launch Manager

J. Cavalier on file__________________________ Date ______
NASG-US Customer & Service Support Manager
Introduction

This document describes the External Customer test plan for the XXXXXXX software release for XXXXXXX Production Publishing Software.

Elements of this document are contained in the following sections:

- Test Overview
- Customer Selection Process
- Test Management
- Field Roles and Training
- Schedule
- Support
- Test Enablers

These sections will provide a brief overview of the scope of the test.
Test Overview

The objective of the XXXXX ECAT Test is to gain customer feedback, using the XXXXXXX software and XXXXX scanner in a customer's environment. It is also to test, externally, the procedures associated with an install and/or upgrade, training and documentation. Although we will be testing the support functions during this test (problem escalations to customer support centers, service support, etc.) ECAT is not intended to test all of the launch processes, i.e. distribution, order entry, spares, Administration, etc. since these systems are currently operational.

This test is not intended to provide in-depth software problem identification and debug of customer-related problems. Software quality will have been demonstrated during in-house phases of testing. However, some tail cases of customer-identified software problems will most likely be encountered.

This release of XXXXXXX mainly provides:

- Xerox scanner, which includes but not limited to:
  - XXXXXXXX
  - XXXXXXXX
  - XXXXXXXX
  - XXXXXXXX
- SPAR fixes for XXXXXXX 2.0 software

There is no platform roll planned but for this release.

The test will include participation from 7 NASG accounts. All of these accounts will be customers that currently have a XXXXXXX installed and operational.

Service coverage for the NASG accounts will be on a 1x5 (8am – 8pm EST) basis.

All sites will receive the FireStar scanner.

The corresponding NASG CBU's will have the ECAT equipment on their budget. The program will pay the monthly costs for the equipment throughout the test. After the test is completed, the customers' have the option of either buying the hardware if EME certified, purchase an EME certified platform, or return the ECAT platform to Xerox. The Program will stop paying the monthly costs of equipment on the Launch date of the product. The ECAT equipment will be shipped to the riggers prior to delivery to the customers.

The program will fund the Customer Support Center (CSC) and Technical Support Center (TSC) Hotlines' hardware (one apiece). At the completion of the test, each appropriate budget center (CSC, TSC) will then pay depreciation.
There will be no charge for the test period and US customers are expected to purchase the system, transfer to a standard trial plan, or have the system removed when the test is complete. There will be a charge for the XXXXXX software itself (same as launch). (This is TBD)

The test will also include 1-2 XCL customers and 3 XE customers (need XCL input). These customers will receive the new hardware, which will be funded by those entities. **XCL will be English only and will require the customer to purchase the new hardware.** Problem reporting and install data collection from these accounts will be the responsibilities of the respective XCL and XE ECAT Test managers.

### Customer Selection Process

Customers will be solicited and chosen based on:

- customer need for new features/operational workflow; must confirm their usage of the feature set
- customer is willing to provide detailed problem feedback in a timely fashion and/or problem jobs
- past cooperation with Xerox; Xerox-friendly account
- existing XXXXXXX installation
- XXXXXXX 2.0 trained support personnel required, Lakes trained if possible to support new scanner/document handler (CSE/CSTS, CTS, etc.)
- High need for the FireStar scanner

A team of the Division ECAT Manager, Launch Manager and Marketing Manager, will have the decision authority on customer selection. Customers will sign a Terms & Conditions (T&C) document for the test that will outline roles and responsibilities and set some expectations. These Ts & Cs will require the customer to use one serial number for all customer/service support calls. Prior to installation, the ECAT Manager will conduct a review of the Customer Information Document and confirm/review expectations with each customer. This document will be issued by the ECAT Manager and will provide information in order to set proper expectations about the test including the escalation process, software and test logistics. The Launch Team will review this document prior to delivery to the customers.

### Test Management

#### Division

The launch and customer engagement organization in PPSBU will manage the test. The PPSBU test manager, Carmen Bottini, will coordinate the information
management from the Operating Company test managers (XCL, XE) and will:

- Be the focal point for test strategy and schedule
- Ensure Operating Company test manager approval of the plan
- Create Customer Information Document
- Provide matrix of customers, their information (i.e. configuration) and Field support/contacts
- Present weekly test summaries at the Launch meetings (see Customer Data Management)
- Interface with Operating Company test managers on test logistics and Program actions
- Integrate the final test customer surveys and provide report to Program in support of the TTM 3.4 exit

Operating Company

Robert Turner (XE), Cathy Durmin (XCL) and Carmen Bottini (NASG) will directly manage the test plan and execution in their respective operating companies. Their activities will include:

- Be the focal point for customer and district interaction
- Develop the test plan
- Manage the customer selection
- Order and coordinate equipment/software installation
- Provide weekly test summaries (see Customer Data Management)
- Attend meetings and review respective problem list and status
- Administer end-of-test customer surveys

Customer Data Management

The Division ECAT Manager will be responsible for gathering all customer data. Data Management involves monitoring all the data provided during the test. The data includes:

- Problems reported by the customers (logs from hotlines, SPARs, escalations from MRSO) using one previously specified serial number
- Customer demographics, i.e. volume, types of jobs, etc.
- Escalation data, such as number of calls received by hotlines
Customer issues which are not software problems, such as feature requests, documentation and training issues, etc.

Throughout the test, the Division Test Manager will tabulate and summarize the incoming data for presentation to the Launch team. The tracking mechanism will be defined prior to the start of the test.

**Customer Feedback Process**

Feedback from the customers will be obtained via the following:

**Logbook**

The customer sites will be asked to provide job/comment logs for weekly collection via fax to the test manage. This data should summarize the jobs run on the system as well as comments by the operator in terms of problems and/or general likes and dislikes of the system and its capabilities. These logs will serve as the basis for the weekly conference calls and will enable the tracking of the number of successful/failed jobs, volume, etc. All problems in the logbook must be reported via the hotline and assigned a log number. The logbook is not to be used to circumvent the normal escalation process.

**Problem Escalation**

The customer support hotline, via the Welcome Center, will be the entry point for all service-related calls, application support, and problem resolution. The customers will be instructed to call Xerox via the toll-free telephone number. From there, all normal call escalation procedures will be used. All ECAT SPARs submitted will be assigned at a level 4, however the Customer severity of the SPAR will be recorded in the log. The Program will attempt to resolve all SPARs prior to launch, however, any SPARs remaining open at the end of the test will be provided with an outlook for resolution.

The Customer and Technical Support hotlines will provide copies of logs of calls received from the ECAT sites (customer and service) and provide this summary on a weekly basis to the ECAT Test Manager.

MakeReady Support Operations (MRSO) will provide a weekly status on call escalations and SPARs at the Launch Team meetings. The Customer Support Team will review all problems related to customer documentation or requiring potential caveats and/or bulletins. The CST will also track to closure escalated customer issues. Problem responses will be communicated to the customer through the normal support processes. These responses will also be provided to the Division Test manager for updates to the problem database.
Weekly Conference Calls

Weekly phone conferences will be held with each customer and will be facilitated by the ECAT Manager. Since all customer software problems must be submitted and tracked through the normal escalation process, these conferences are not intended to address individual technical problems, but rather to gather an overall view of the weekly test activity. This information could include the Logbook (job success rate, volume, service calls), information regarding training, documentation, hotline and service support.

The ECAT Manager will provide these summaries at the weekly Launch Team meetings. At the conclusion of the test, a formal survey will be conducted with the test customers. This will provide the final feedback that will feed the launch decision. The Division test manager, in conjunction with the Program, will create the survey. The Operating Company Test Managers will administer the survey to their respective test customers.

Service Data Management

In addition to knowing the customer response to the product, the Program also needs to understand the service response and actual service impacts of the system. To that end, logs from the Technical Support Hotline (Field Engineers) will be provided to the Order to Install (OTI) team for review.

Local service district personnel (CSE, CSTS) will perform installs with OTI (Order-To-Install) observers present to document installation related problems. OTI will also be responsible for the resolution of all installation related procedural problems.

Field Roles and Training

Sales

Sales representatives will assist in site selection with strong support from the test manager and Program marketing. The test managers will work through the Sales representatives to coordinate any customer visits during the test and the final survey administration visit.

Analysts

Analysts will be responsible for gathering the information required for the Installation Worksheet to ensure customer readiness and assist in setting customer expectations.

CSE/CSTS

The draft service update training package will be sent to
The Test Manager will supply MC&SE with the appropriate list of personnel for mailing purposes. MC&SE will handle the actual shipment process.

Following installation, the CSE/CSTs will be required to enter the PC serial numbers into FWSS to allow for ECAT support.

**XCSC/FE**

The Xerox Customer Support Center in Woodcliff and the Field Engineers will be provided training for the test by the MakeReady Support Operations (MRSO) team. SME support will also be provided on an as-needed basis.

**CTS**

Customer Training Specialists will receive Document Scan & MakeReady training via a self-paced update package. Web Viewing and Submission training will be conducted via a hands-on, instructor led class conducted by MC&SE.

CTS's will then train the customers immediately following installation/upgrade of the XXXXXXX software.
Schedule

Hardware shipped to rigger 1/10/99

The test is scheduled to begin with installs of the customers (7 NASG, 3 XE & 1-2 XCL) on (1/17/00). This will follow a Go/Wait ECAT review on 1/12/00.

Data collection will begin for customers on 1/17/00. This will provide several weeks of test data collection.

The week of 3/8/00, customer satisfaction surveys will be taken at all NASG ECAT customer locations in preparation for the Launch Go/Wait meeting on 3/13/00. Input from these surveys and weekly data collection will be utilized in determining "readiness for launch".

Support

The following support functions are required to support the test:

- Service documentation - Updates to the documentation for XXXXXXX will be provided to the service force via hardcopy. MC&SE will duplicate and distribute this information. (M. Mihalenko)
- Service training - Self taught training documentation will be provided via hardcopy. MC&SE will duplicate and distribute these packages. (M. Mihalenko)
- Customer documentation - Updates to the documentation for XXXXXXX will be provided via hardcopy. MC&SE will duplicate these documents and provide to SCM for the software kits. (M. Mihalenko)
- Customer training documentation - Updated training material for CTSs will be provided hardcopy. MC&SE will duplicate and distribute these packages. (M. Mihalenko)
- Analyst/Sales training - Self taught by reading Technical update documentation provided by Leesburg. (D. Dunn).
- Customer and Technical Hotline Support (J. Cavalier)
- MRSO Support (B. Hardy)
- SPAR Support (B. Hardy)
- OTI Support - Representatives attending installs to observe and capture install related problems. (B. Hardy).
As stated previously, numerous support functions need to be in place to enable the start of test. These items are defined, along with delivery dates, on the following chart (next page). A review of these enablers will take place at the ECAT Go/Wait to insure all items are ready to support the start of test.
**Enabler Checklist**

<table>
<thead>
<tr>
<th>Key Test Deliverables</th>
<th>Owner</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>ECAT Test Plan (draft)</td>
<td>C. Bottini</td>
<td>5/12/98</td>
</tr>
<tr>
<td>ECAT Customer selection finalized</td>
<td>C. Bottini</td>
<td>11/29/98</td>
</tr>
<tr>
<td>Customer Terms &amp; Conditions Signed</td>
<td>C. Bottini</td>
<td>12/6/98</td>
</tr>
<tr>
<td>Issue Customer Information Document</td>
<td>C. Bottini</td>
<td>10/1/98</td>
</tr>
<tr>
<td>Hardware Shipped (including Hotlines)</td>
<td>C. Bottini</td>
<td>1/10/99</td>
</tr>
<tr>
<td>S/W Kits ready</td>
<td>C. Heil</td>
<td>1/12/99</td>
</tr>
<tr>
<td>CTSs trained</td>
<td></td>
<td>1/10/99</td>
</tr>
<tr>
<td>Customer Documentation (draft) ready</td>
<td>M. Mihalenko</td>
<td>1/10/99</td>
</tr>
<tr>
<td>Service Installation &amp; Upgrade procedures (draft) ready</td>
<td>M. Mihalenko</td>
<td>1/10/99</td>
</tr>
<tr>
<td>Service Update Training documentation (draft) to service reps.</td>
<td>M. Mihalenko</td>
<td>1/10/99</td>
</tr>
<tr>
<td>Customer Training Documentation (draft) ready</td>
<td>M. Mihalenko</td>
<td>1/10/99</td>
</tr>
<tr>
<td>Service Support in place to support install actions</td>
<td>B. Moranz/B. Hardy</td>
<td>1/10/99</td>
</tr>
<tr>
<td>OTI Observer program in place &amp; assigned to accounts</td>
<td>B. Hardy</td>
<td>1/05/99</td>
</tr>
<tr>
<td>Hotline support trained &amp; ready</td>
<td>J. Cavalier</td>
<td>1/10/99</td>
</tr>
<tr>
<td>Debug Support trained &amp; ready</td>
<td>J. Cavalier/B. Hardy</td>
<td>1/10/99</td>
</tr>
<tr>
<td>SPAR &amp; Customer Support ready</td>
<td>B. Hardy</td>
<td>1/10/99</td>
</tr>
<tr>
<td>Provide list of Customer names/addresses &amp; analyst names/analysts to B. Hardy to support bulletin process</td>
<td>C. Bottini</td>
<td>11/29/98</td>
</tr>
<tr>
<td>ECAT Go/Wait Review</td>
<td>PMT</td>
<td>1/12/99</td>
</tr>
<tr>
<td>Upgrade Kits Shipped (if hand carried by OTI observers, date is 1/17/00)</td>
<td>OTI</td>
<td>1/12/99</td>
</tr>
<tr>
<td>ECAT Upgrades start</td>
<td>OTI/ Districts</td>
<td>1/17/99</td>
</tr>
<tr>
<td>Data collection process begins</td>
<td>C. Bottini</td>
<td>1/24/99</td>
</tr>
<tr>
<td>Report Test Data to PMT during test period</td>
<td>C. Bottini</td>
<td>1/17/99</td>
</tr>
<tr>
<td>Begin end-of-test surveys</td>
<td>PMT</td>
<td>3/8/99</td>
</tr>
<tr>
<td>Complete end-of-test surveys</td>
<td>PMT</td>
<td>3/13/99</td>
</tr>
<tr>
<td>ECAT Test period ends</td>
<td></td>
<td>4/3/99</td>
</tr>
<tr>
<td>Input to Launch Go/Wait reviews</td>
<td>C. Bottini</td>
<td>3/13/99</td>
</tr>
<tr>
<td>Product X Launch</td>
<td></td>
<td>5/18/99</td>
</tr>
</tbody>
</table>
Appendix C:

ECE Nomination Package
To nominate a customer, fax the completed nomination package to Carmen Bottini at 8*222-0040 and send the hardcopy to:

Xerox Corporation
800 Phillips Road
MS #139-26A
Webster, New York 14580
Attn: Carmen Bottini

Product: Product X Production Software version 2.0
Nominations Due: 6/1/99
ECAT Start Date: 8/9/99
Launch Date: 10/18/99
Test Overview

The objective of the Product X ECAT is to gain customer feedback, using the Product X software and its operation in a customer's environment. It is also to test, externally, the procedures associated with an install and/or upgrade, training and documentation. Although we will be testing the support functions during this test (problem escalations to customer support centers, service support, etc.) ECAT is not intended to test all of the launch processes, i.e. distribution, order entry, spares, Administration, etc. since these systems are currently operational.

This test is not intended to provide in-depth software problem identification and debug of customer-related problems. Software quality will have been demonstrated during in-house phases of testing, although some tails cases of customer-identified software problems will most likely be encountered.

Due to launch requirements, only existing Product X customers will be considered for selection. Existing customers will have experience with Product X and already have applications available for immediate testing. It is also important that each customer nominated have the personnel, resources and space for installation, in order to begin testing as soon as possible after the equipment arrives and update training is complete.

In addition, it is expected that ECAT customers will share specific productivity improvement or cost savings and to give feedback to Xerox marketing messages about the new software and how it improves the customer's work process, applications or simply meets what they wish to accomplish.

Product X Overview

Release 2.0 will provide to our customers' unprecedented levels of productivity, flexibility and ease of use over previous releases. In addition, Product X will provide to our customers a very powerful, yet credible, end-to-end solution in helping them leverage the benefits of knowledge sharing. Product X will become the solution of choice for knowledge sharing within the production customers, whether they are in-house print shops, print per pay or commercial printers.
Features and Benefits

In general, new or existing Product X customers will experience the following:

Many new capabilities supporting more business applications especially for knowledge sharing
Friendlier and easier of use
Increased productivity
More consistency in support of printing from various Product X components
Improved security especially the Web
Better integration with Decomp services
Significantly improved book and makeready workflow
Major web enhancements

Document Scan and Makeready

Section-level headers and footers to meeting a wider range of document requirements. Product X users can add more value to the documents.

Enhancements to the In-line Image Editor allow users to perform all of their image editing from the same utility, the same way. The Image Edit Tool will no longer be required.

Friendlier Interposer Support – A new page icon will be added to allow programming of inserts within DSM (similar to adding blank pages), an ease of use improvement.

2-up Right Flip eliminates the need to rotate the images upside down prior to printing 2-up flip.

Up to 16-up imposition reduces paper waste and the use of more standard paper sizes. It also increases the overall productivity by allowing on screen preview.

Similar to the PostScript import feature, the new PDF Import will allow DSM to import PDF file format directly. It's no longer required to first convert PDF to PS.

PDF Export for a range of pages speeds up the conversion process when only a section of the document is needed.

Improved Decomp Interface provides easier workflow to import and manage jobs sent to Decomp.

Preserve stock type and stock color property for standard jobs printing. As multi-up jobs reduces reprogramming of special pages when going from 1-up to multiple-up printing.
Paste/Paste Merge from Clipboard makes repurpose of images much easier than ever. Bitmapped images in color or gray scale can be pasted in DSM after being conversion to 1-bit per pixel or bitonal. Bitmaps with unsupported resolutions like screen resolution will be converted to the nearest supported resolution. Archived images in various image formats can now be pasted into DSM via the clipboard. It's no longer required to print and then scan images destined to the Merge Library.

Document Library

Cabinet/Folder/Document object paradigm provides better security and better way to organize documents. Users will no longer have to deal with directories or sub-directories.

Content Text Search – integrating of Visual Recall technology will allow Product X customers to locate a document based on the text contained in the document. Besides the ability to perform text search in formats for common desktop applications such as Word, PowerPoint, PDF, users can conduct content search in a RDO document after it has gone through the OCR process. Users still retain the ability to locate/search documents based on assigned attributes as being done in Product X 1.x.

Oracle database will be used as the “run time” database. Oracle allows Product X to support more documents than previously enabled by Centura. Oracle also brings flexibility to access stored data such as the ability to export the database contents as delimited file that can be imported into other databases for data mining. Customers can also use their own Crystal Report application to generate their own reports.

Web Viewing and Submission

Enhanced Security – Secured Socket Layer (SSL) will be available as an option for transmission of customer infos and files (through the Web browser upload).

Web Access Accounting – Data related to downloading, viewing and job submission will be available to export as delimited ASCII file for third-party billing application. Product X will provide some standard reports as well.

Indicators of new account request and jobs to ease the tracking of new activities

Web to Web transfer – enables forwarding of jobs submitted over the network to another WVS server.
This allows print shops to collaborate in balancing the job loads among them.

Automated compression/decompression – this feature will reduce the file size for faster transmission between a client and WVS server.

Order documents while viewing – While viewing a document within a collection, an user with established account could select the order option which will provide the same interface as the job submission function. This feature will enable the Product X WVS owners to offer new services and could charge for the service.

Submission of RDO – Product X native files could be transferred from one site to another WVS server. Remote capture or satellite production printing workflow has never been easier.

Ability to merge multiple files and print as 1 job reduces the steps required for the print operator to submit jobs with multiple files.

---

Test Logistics

All of the accounts will be customers that currently have a Product X installed and operational. Some accounts will be Web Viewing & Submission sites.

Service coverage for the accounts will be on a 1x5 (8am – 8pm EST) basis.

All sites will receive new hardware, some with the current configuration and possibly some with a new hardware configuration. This will ensure that down time for problem investigation will not impact the customer’s business if an emergency situation arises. However, customers will be asked to unplug and set aside the old system so that they will not be tempted to use it except in emergency situations. A service technician will be required to return the old system to an operational state. All Product X systems at a customer site must be at the same software level for the test.

In order to perform upgrades in the field, some customers’ systems will be migrated to new hardware and the upgrade performed. A backup of the old system, and restore to a new platform, will be performed by the service technician and the software upgraded to 2.0.

Customers must be made aware that the jobs created and/or registered (in the database) on the new 2.0 system will not be compatible with old software (not backward compatible).
At the completion of the test, the customers’ equipment must either be purchased (transferred to District/CBU/ASO budget center) or returned to Webster, NY. The ECAT equipment will be shipped to the riggers prior to delivery to the customers.

There will be no charge for the test period and US customers are expected to purchase the system (software and/or hardware), transfer to a standard trial plan, or have the system removed when the test is complete. There may be a charge for the 2.0 software itself (same as launch).

Customer Feedback Process

Feedback from the customers will be obtained via the following:

Logbook

The customer sites will be asked to provide job/comment logs for weekly collection via fax to the test manager. This data should summarize the jobs run on the system as well as comments by the operator in terms of problems and/or general likes and dislikes of the system and its capabilities. These logs will serve as the basis for the weekly conference calls and will enable the tracking of the number of successful/failed jobs, volume, etc. All problems in the logbook must be reported via the hotline and assigned a log number. The logbook is not to be used to circumvent the normal escalation process.

Problem Escalation

The customer support hotline, via the Welcome Center, will be the entry point for all service-related calls, application support, and problem resolution. The customers will be instructed to call Xerox via the toll-free telephone number. From there, all normal call escalation procedures will be used. All ECAT SPARs submitted will be assigned at a level 4, however the Customer severity of the SPAR will be recorded in the log. The Program will attempt to resolve all SPARs prior to launch, however, any SPARs remaining open at the end of the test will be provided with an outlook for resolution.

Weekly Conference Calls

Weekly phone conferences will be held with each customer and will be facilitated by the ECAT Manager. Since all customer software problems must be submitted and tracked through the normal escalation process, these conferences are not intended to address individual technical problems, but rather to
gather an overall view of the weekly test activity. This information could include the Logbook (job success rate, volume, service calls), information regarding training, documentation, hotline and service support.

At the conclusion of the test, a formal survey will be conducted with the test customers. This will provide the final feedback that will feed the launch decision.

Field Roles and Training

Sales

Sales representatives will assist in site selection with strong support from the test manager and Program marketing. The test managers will work through the Sales representatives to coordinate any customer visits during the test and the final survey administration visit.

Analysts

Analysts will be responsible for gathering the information required for the Installation Worksheet to ensure customer/site readiness and assist in setting customer expectations.

CSE/CSTS

The draft service update training package will be sent to the appropriate CSE/CSTSs.

Following installation, the CSE/CSTSs will be required to enter the PC serial numbers into FWSS to allow for ECAT support.

XCSC/FE

The Xerox Customer Support Center (800-821-2797) and the Field Engineers will provide 1x5 support for the ECAT. Customers will be required to identify themselves as a 2.0 ECAT site by using the assigned serial number.

CTS

Customer Training Specialists will receive Document Scan & MakeReady training via a self-paced update package. Web Viewing and Submission training will be conducted via a hands-on, instructor led class conducted by MC&SE.

CTSs will then train the customers immediately following installation/upgrade of the Product X software.
Test Schedule

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nomination process start date</td>
<td>5/10/98</td>
</tr>
<tr>
<td>Nomination packages due by</td>
<td>6/1/98</td>
</tr>
<tr>
<td>Customers selected by</td>
<td>6/14/98</td>
</tr>
<tr>
<td>Terms &amp; Conditions to customers</td>
<td>6/15/98</td>
</tr>
<tr>
<td>Terms &amp; Conditions signed</td>
<td>6/28/98</td>
</tr>
<tr>
<td>Equipment shipped to riggers</td>
<td>7/21/98</td>
</tr>
<tr>
<td>Test start date (install &amp; training)</td>
<td>8/9/98</td>
</tr>
<tr>
<td>Customer surveys</td>
<td>week of 9/20/98</td>
</tr>
<tr>
<td>Test ends</td>
<td>10/1/98</td>
</tr>
</tbody>
</table>

Customer Selection Process

Customers will be solicited and chosen based on:

- customer need for new features/operational workflow; must confirm their usage of the feature set
- customer is willing to provide detailed problem feedback in a timely fashion and/or problem jobs
- past cooperation with Xerox; Xerox-friendly account
- existing Product X installation
- trained support personnel (CSE/CSTS, CTS, etc.)
- ability to provide weekly status reporting

A team of the Division ECAT Manager, Launch Manager, Marketing Manager, and NASG-US Launch Manager will have the decision authority on customer selection. Customers will sign a Terms & Conditions (T&C) document for the test that will outline roles and responsibilities and set some expectations. These Ts & Cs will require the customer to use one serial number for all customer/service support calls. Prior to installation, the ECAT Manager will conduct a review of a Customer Information Document and confirm/review expectations with each customer. This document will be issued by the ECAT Manager and will provide information in order to set proper expectations about the test including the escalation process, software, and test logistics. This document will be reviewed by the Launch Team prior to delivery to the customers.
Phase 1 - Submitting nominees

1. Completely fill out the ECAT nomination package, 1 per customer. *Incomplete packages will not be accepted.* Submission of a nomination package does not guarantee a customer will be selected for ECAT. This package is Xerox Private Data and not intended to be distributed to customers.

2. Obtain the required Xerox signatures.

3. Fax a copy of the completed package to the ECAT Manager, Carmen Bottini, at 8*222-0040

4. Send a hardcopy of the nomination package to the ECAT Manager at the address shown on the front page.

You will be notified whether or not your customer was selected, after the nomination process ends.

Phase 2 – Selected customers only

1. The ECAT Manager will send Terms & Conditions forms to you

2. You must return (fax & hardcopy) the signed Ts&Cs by the assigned date

3. ECAT Manager meets with members of the local Xerox team and customer, prior to installation, to ensure site readiness, review Customer Information Document, and set expectations.

ECAT Nomination Forms

The remainder of this package contains the forms necessary to nominate a customer for ECAT. If you have any questions please feel free to call Carmen Bottini at 8*222-4554.
Product X ECAT - Customer Questionnaire
(1 per customer)

To Be Completed by NASG representative – NOT the customer

Customer Name: ____________________________________________

Address: ________________________________________________

City/State/Zip: __________________________________________

Primary Contact: _________ Title: ___________ Phone: __________

Secondary Contact: _________ Title: ___________ Phone: __________

1. What is the customer's current configuration?
   - Document Scan & MakeReady
   - Document Library
   - Web Viewing & Submission

   Software Version: ______________________________________

   Production Printers: ____________________________________

2. Please list which features the customer would test.
   ______________________________________________________
   ______________________________________________________
   ______________________________________________________
   ______________________________________________________
   ______________________________________________________
Appendix D:

ECE New Feature Checklist
## Product X Feature Check-List for ECAT Sites

<table>
<thead>
<tr>
<th>FD Subject</th>
<th>Title / Description</th>
<th>Customer A</th>
<th>Customer B</th>
<th>Customer C</th>
<th>Customer D</th>
<th>Customer E</th>
</tr>
</thead>
<tbody>
<tr>
<td>524A Appvd</td>
<td>Import files</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>492A Appvd</td>
<td>PDF Export for a range of page</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>533A Appvd</td>
<td>Preserve type and color of papers when printing 2-up or multiple-up</td>
<td>maybe</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>532A Appvd</td>
<td>Enhanced Decom Service Interface</td>
<td>import and manage jobs from Decom Queue</td>
<td>maybe</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>511A Appvd</td>
<td>Easier Workflow to Index/search DSM (Use Cabinet / Folder / Document metaphor)</td>
<td>Improved workflow with Document Library. Allow search in DSM when opening and existing documents. Database registration during save.</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>529A Appvd</td>
<td>Enable page level indexing within RDOs</td>
<td>OCR per page</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>546A Appvd</td>
<td>Simplify UI</td>
<td>Use printer model to enable features within UI</td>
<td>maybe</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>517A Appvd</td>
<td>Simplify UI - Enhanced drag and drop</td>
<td>Scroll structure window tree when dragging</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>518A Appvd</td>
<td>Simplify UI - Enhanced drag and drop</td>
<td>Drag header/footer/page numbers in view window</td>
<td>Maybe</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>527A Appvd</td>
<td>Simplify UI - Enhancement to image edit within DA</td>
<td>Incorporate remaining EditTool features, add support for rectangle mode and support color link annotation.</td>
<td>Maybe</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>516A Appvd</td>
<td>Extended Page Number with Auto Numbering</td>
<td>Section-level Headers and Footers by section</td>
<td>Maybe</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>549A Appvd</td>
<td>Interposer Support within DSM.</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Class: M = Maintenance, Up = Upgrade, St = Strategic, F = Feature (for additional information see 094 Product X Requirements Management Process)*
Appendix E:

ECE Terms and Conditions
Product X Customer Test Agreement  

CONFIDENTIAL

Customer Name

Address

City, State, Zip code

This is an agreement between the above named Customer and Company Corporation concerning the Customer Testing and use of Company Document Production products and/or associated software provided to Customer by Company, more particularly identified in paragraph 12 (collectively referred to as “System”). Customer and Company agree as follows:

1. Customer recognizes that the subject System is in a Test status and may incur operating difficulties beyond Company' expectations. The System is not yet publicly available and final specifications and pricing are subject to change without notice. Company does not represent or guarantee that the System or any part thereof, will be introduced as a commercial product by Company.

2. The term of this Agreement shall begin when the System is installed at Customer’s facility (“Installation Date”) and continue thereafter until October 15, 1999. The customer may terminate this Agreement upon written notice, with an explanation for such termination, at any time during the Test Period. Upon termination of this Agreement, Customer agrees to allow Company to remove the System and agrees to cooperate with Company in Company’ removal of the System.

3. Customer will use reasonable efforts to subject the System to as near normal workload as possible, and to cooperate in the identification, isolation, documentation and reporting of any and all problems encountered.

4. Customer expressly agrees not to disclose to third parties, and only to persons in its own organization who have a need to know, the existence or content of (i) the System; (ii) the test its results, or (iii) this Agreement. All Customer employees who have a need to know the above must sign a non-disclosure agreement.

5. Customer agrees that they will not allow competitive equipment in the same area as (i) the System and that (ii) competitors employees will not have access to the area.

6. Customer agrees that no one shall be permitted to make photographs, video, graphic or other visual depiction of the System or components thereof, or to copy associated literature pertaining thereto without the specific (prior) authorization of the Company Program Manager for the System.

7. Company will use reasonable efforts to identify and remedy System deficiencies encountered during the Test period. Company shall have no responsibility for identifying or correcting deficiencies in Non-Company products connected to or used with the System or for otherwise providing service or support for such Non-Company products.

8. The System shall be “Installed At” the following Customer location:

Floor, Room Routing: ___________________________

Street Address: ___________________________

City: __________ State: __________ Zip: ______

Contact Name ___________________________

Phone# ___________________________

Contact Title ___________________________

9. All elements on the network that the System will connect to must be at the current level of hardware, software, release/version level, retrofit, etc. at the start of the Test period.
10. CUSTOMER RESPONSIBLE FOR:

A. Required reporting for the Test period and scheduled timetables are as follows:

   **Customer Problem Logs:** Customer will maintain a log of all problems encountered on the System and provide this information to Company (hotline) on a regular basis during the Test.

   **Periodic Conference Calls:** Customer agrees to support periodic telephone conference calls where they will verbally communicate observations of the test. Company personnel will be allowed to ask the customer further details about topics reported during these calls. These calls will be scheduled with the customer on some agreed to periodic basis.

   **Utilize Customer Support Process:** Customer agrees to utilize the Customer Support Hotline for all technical issues, problems or questions regarding the System. Customer will obtain a log # for each call and record the assigned log # back into the Problem log book for tracking purposes.

   **Customer Satisfaction Survey:** At the end of the test period, a Customer Satisfaction Survey will be completed by the customer to assess their level of satisfaction with both Company and the System under test.

B. Ensuring that all power, space and network requirements are in place prior to installation of the System.

C. Suitable electrical service and environmental control for operation of the System.

D. Any charges for the following:
   - Facility modifications
   - Supplies

E. Providing Company physical access to the System upon reasonable notice.

F. Providing Company access to problem jobs and corresponding printed output.

11. COMPANY RESPONSIBLE FOR:

A. Providing installation and user documentation for the System.

B. Providing hotline service and support for the system on a 1x5 coverage basis (8:00a.m. – 8:00 p.m. EST).

C. Protecting customer sensitive data from unauthorized disclosure, where such data was retrieved from the System for problem investigation purposes.
SYSTEM CONFIGURATION, PRICING, TERMS & CONDITIONS

12. SYSTEM CONFIGURATION:

<table>
<thead>
<tr>
<th>Market Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SOFTWARE (ECAT version)</td>
<td>n/a Product X Software &amp; Documentation Kit</td>
</tr>
<tr>
<td>n/a</td>
<td>n/a</td>
</tr>
</tbody>
</table>

13. TEST PRICING & LOGISTICS:

A. The customer will be responsible to have a Company Field Service Maintenance Agreement (FSMA) in place on the system under Test during the test period. There will be no additional charges to the customer for the usage of this software during the test period.

B. Service coverage provided on a 1x5 basis (8:00 a.m. – 5:00p.m).

C. USCO Customers will receive equipment (free for duration of test). It is agreed that the equipment must be purchased or returned at test completion.

D. Customers current configuration will be “set aside” and only used during emergency situations. A Company technician will return the equipment to an operating state.

E. Documents scanned/upgraded to Product X CANNOT go back to previous software levels.

F. SSL customers must provide a SSL certificate. The site must also provide Service Pack 4.0 or access to the internet so Company service personnel can install it.

14. LICENSED SOFTWARE:

A. During the test period, Company grants you a non-exclusive, non-transferable license to use the Licensed Software and Licensed Media only on the Designed Equipment and only within the territory, and to make one back-up copy of the Licensed Software and Licensed Documentation.

B. Title to the Licensed Software, all copies thereof, and all patent copyright, trade secret and other proprietary rights therein shall at all times reside exclusively with Company and/or its licensors during the test period. You have no rights to the Licensed Software other than the rights granted herein. Specifically, and not by way of limitation, you shall not distribute, modify, decompile, attempt to decompile, reverse engineer or attempt to reverse engineer the Licensed Software, create derivative works of the Licensed Software or modify any print fonts included in the Licensed software.

C. If the Licensed Software includes software developed by a third party, the third party shall not be liable to the Customer for any breech by Company of its obligations under this Agreement. The third party shall, however, be considered a third party beneficiary of your obligations under this Agreement.

D. This license is terminated at the end of the test period.

E. Upon any termination of this license, you shall promptly discontinue use of the Licensed Software, Licensed Media and Licensed Documentation, and either deliver to Company and/or destroy, at the option of Company, all Licensed Software (except for firmware) which Company is providing support for the Licensed Software. You shall allow Company to access the Designated Equipment.
Product X Customer Test Agreement

TERMS & CONDITIONS AND GENERAL INFORMATION

15. SOFTWARE SUPPORT:

A. Company technical support personnel will perform installation of Software and subsequent updates thereto.
B. Company will also provide a Customer Telephone Support Center during normal support hours.
C. The customer agrees that all requests for help in System operation and technical support will be made by a Company trained operator through the Woodcliff Customer Support Center.
D. The customer also agreed that all requests for help or technical support from a client user will be directed to the Woodcliff Customer Support Center through a Company trained customer administrator or network administrator.

16. SAFETY / EME REQUIREMENTS

The System provided hereunder may not meet all local safety/EME requirements. Customer is solely responsible for and hereby accepts responsibility for any reasonable and necessary safety precautions in this regard. It is understood that, as a prototype or pre-production unit, System may not achieve specified performance figures outlined in any performance specification documents.

17. INDEMNITY

Company will defend Customer from, and pay any ultimate judgment for, infringement in the United States by Product on any patent, trademark, trade secret or copyright, if Customer promptly notifies Company in writing of any alleged infringement, allows Company to defend, and cooperates with Company. Company is not responsible for any non-Company litigation expenses or settlements unless Company agrees to them in writing. To avoid infringement (even if not alleged), Company may, at its sole option and at no charge to Customer, modify the System, substitute an equivalent of the System or remove the System. Company makes no other express or implied warranty of non-infringement and has no other liability for infringement or any damages therefrom.

and

Company is not liable for any infringement due to Equipment or Software being made or modified to Customer specifications (by Company or others, including Customer), or being used or sold in combination with equipment, software, or supplies not provided by Company. IMPORTANT: Company makes no other express or implied warranty of non-infringement and has no other liability for infringement or any damages therefrom.

18. LIMITATION / DISCLAIMER OF LIABILITY

A. COMPANY SHALL HAVE NO LIABILITY FOR DAMAGE TO OR DEFICIENCIES IN PERFORMANCE OF NON-COMPANY PRODUCTS RESULTING FROM THE USE OR PERFORMANCE OF THE SYSTEM.
B. COMPANY' MAXIMUM LIABILITY HEREUNDER FOR DAMAGES OF ANY KIND OR TYPE, WHETHER DIRECT, INDIRECT, CONSEQUENTIAL, INCIDENTAL, OR SPECIAL DAMAGES RELATED TO THE MANUFACTURE, USE OR PERFORMANCE OF THE SYSTEM, WHETHER ARISING IN CONTRACT, TORT (INCLUDING NEGLIGENCE), OR ANY OTHER THEORY SHALL BE LIMITED TO TWO-HUNDRED FIFTY THOUSAND ($250,000) DOLLARS.

19. GOVERNING LAW

This agreement shall be governed by the laws of the State of NEW YORK.

20. NON-ASSIGNABILITY

Customer acknowledges that the System is the exclusive property of Company and neither this Agreement nor any part of the System may be assigned or transferred by Customer without Company' prior written consent.

21. NO WARRANTY

SYSTEM IS SUPPLIED ON AN 'AS IS' BASIS WITHOUT WARRANTY OF ANY KIND, AND COMPANY DISCLAIMS ANY ALL IMPLIED WARRANTIES INCLUDING BUT NOT LIMITED TO THE IMPLIED WARRANTIES OF MERCHANTABILITY AND OF FITNESS FOR A PARTICULAR PURPOSE.

22. ENTIRE AGREEMENT

The foregoing, and the previously executed Non-Disclosure Statement between the parties, constitute the entire agreement between Company and Customer governing the System Testing period and supersede all prior or contemporaneous agreements. This Agreement shall not be effective until executed by Customer and Company.
For this agreement to be valid, the below designated individuals must affix their signature. When an account is accepted as a Test Site, a completed agreement will be returned to the Customer with the Site Acceptance letter.

Customer Name (Print) ................................................................. Title

Customer Signature ........................................................................

Customer Phone # ........................................................................

Company Sales Representative ......................................................... Date

Company Test Manager .................................................................... Date
1. To further the business relationship between Company and Contractor, it is necessary and desirable that Company disclose to Contractor confidential information (hereinafter referred to as "Company Information") concerning all of the follow: current, future, or proposed products of Company; business forecasts and procurement requirements of Company; plans and technology relating to the foregoing.

2. Contractor shall not communicate Company Information to any third party and shall use its best efforts to prevent inadvertent disclosure of Company Information to any third party.

3. Contractor shall neither use Company Information nor circulate it within its own organization except to the extent necessary for-
   (a) negotiations and consultations with their required personnel or authorized representative of Company;
   (b) supplying Company with goods or services at its order;
   (c) preparing bids, estimates and proposals for submission to Company; and
   (d) any purpose Company may hereafter authorize in writing.

4. The obligations of Paragraphs 2 and 3 hereof shall terminate with respect to any particular portion of the Company Information (i) when Contractor can document that
   (a) it was in the public domain at the time of Company' communication thereof to Contractor,
   (b) it entered the public domain through no fault of Contractor subsequent to the time of Company’ communication thereof to Contractor,
   (c) it was in Contractor's possession free of any obligation of confidence at the time of Company’ communication thereof to Contractor,
   (d) it was rightfully communicated to Contractor free of any obligation of confidence subsequent to the time of Company’ communication thereof to Contractor, or
   (e) it was developed by employees or agents of Contractor independently of and without reference to any Company Information or other information that Company has disclosed in confidence to any third party; or (ii) when it is communicated by Company to a third party free of any obligation of confidence; or, (iii) in any event, five years after Company’ communication thereof to Contractor.

5. All materials including, without limitation, documents, drawings, models, apparatus, sketches, designs, and lists furnished to Contractor by Company and which are designated in writing to be the property of Company shall remain the property of Company and shall be returned to Company promptly at its request with all copies made thereof.

6. Communication from Contractor to personnel and authorized representatives of Company shall not be in violation of the proprietary rights of any third party and shall be made without any obligation of confidence.

7. This Agreement shall govern all communications between Company and Contractor that are made during the period from ___________ to the date on which either party receives from the other written notice that subsequent communications shall not be so governed.

8. Contractor shall not export, directly or indirectly, any technical data acquired from Company under this Agreement or any products utilizing any such data to any country for which the U.S. Government or any agency thereof at the time of export requires an export license or other Government approval without first obtaining such license or approval.

9. This Agreement shall be construed in accordance with the laws of New York State.
Appendix F:

ECE Customer Engagement Criteria
<table>
<thead>
<tr>
<th>ELEMENTS OF DECISION CRITERIA</th>
<th>Responsible Manager</th>
<th>LAUNCH (M/N) targets</th>
<th>ECAT (M/N) full field engagement</th>
<th>Status R/Y/G</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>SYSTEM QCD’s</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Performance</td>
<td></td>
<td></td>
<td></td>
<td>Yellow</td>
</tr>
<tr>
<td>System Repro. Mode-Triple</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Concurrency</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DSM sustained job submission</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>w/o deskew/despeckle function</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>on a private net with CR</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>24:1, simplex originals</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. <strong>System Installation Time</strong></td>
<td></td>
<td></td>
<td></td>
<td>Yellow</td>
</tr>
<tr>
<td>• DSM/new install</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Upgrade</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Reliability: NASG</td>
<td></td>
<td></td>
<td></td>
<td>Green</td>
</tr>
<tr>
<td>4. Image Quality</td>
<td></td>
<td></td>
<td></td>
<td>Yellow</td>
</tr>
<tr>
<td>• Repro (end-to-end)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Ortho (end-to-end)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Module Quality</td>
<td></td>
<td>All modules meet targets per individual module QCDs</td>
<td>All modules meet targets per individual module QCDs</td>
<td>Yellow</td>
</tr>
<tr>
<td>6. Faultless Install</td>
<td></td>
<td>0 failed attempted deliveries</td>
<td>0 aborted installs</td>
<td>N/A for ECAT</td>
</tr>
<tr>
<td>7. Customer Acceptance Limitation</td>
<td></td>
<td></td>
<td></td>
<td>Green</td>
</tr>
<tr>
<td>• Requires advance explanation of a major deviation to a customer</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>⇒ Input/recommendation of CST</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. CSPM SPAR Process</td>
<td></td>
<td></td>
<td></td>
<td>Green</td>
</tr>
<tr>
<td>• Target Response Times &amp;Defs (Division targets - From Receipt of SPAR): 90% targets</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Level 1 (Soln Rec’d by Op Unit)</td>
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<tr>
<td>Level 2</td>
<td></td>
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<tr>
<td>Level 3</td>
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<tr>
<td>Level 4</td>
<td></td>
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<tr>
<td>9. Early Warning</td>
<td></td>
<td></td>
<td></td>
<td>Yellow</td>
</tr>
<tr>
<td>• Early Warning System in place to collect and analyze data.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### ELEMENTS OF DECISION CRITERIA

<table>
<thead>
<tr>
<th>ELEMENTS OF DECISION CRITERIA</th>
<th>Responsible Manager</th>
<th>LAUNCH (M/N)</th>
<th>ECAT (M/N)</th>
<th>STATUS R/Y/G</th>
</tr>
</thead>
<tbody>
<tr>
<td>SYSTEMS ACCEPTANCE TEST</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>10. Predictability</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Job Success Rate</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(submitted via supported</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>drivers and submission</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>tools)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Genoa Test Suite Jobs</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>11. Job Integrity</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- There should be no known/</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>open problems with</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>missing information,</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>misordered and extra</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>information in output</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>12. Customer Documentation &amp; Training Usability</strong></td>
<td></td>
<td>&gt;=4.0</td>
<td>&gt;=3.8</td>
<td>Green</td>
</tr>
<tr>
<td>Criteria Description: Scale 1-5 Training meets requirements for usability/relevance:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Strongly disagree</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Disagree</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Neither agree nor disagree</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>4. Agree</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>5. Strongly agree</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td><strong>13. Customer Documentation (other than Customer Training Documentation)</strong></td>
<td>Launch content and form</td>
<td>Launch content and draft form</td>
<td>Yellow</td>
<td></td>
</tr>
<tr>
<td>- Updates incorporated into all module documentation</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>14. Customer Training and Training Documentation</strong></td>
<td>Launch content and form</td>
<td>No outstanding issues; Produced &amp; handed off to translation</td>
<td>Yellow</td>
<td></td>
</tr>
<tr>
<td>- Updates incorporated</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>16. Customer Hotline</strong></td>
<td>10-20%</td>
<td>20-30%</td>
<td>Green</td>
<td></td>
</tr>
<tr>
<td>- Escalation Rate to</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Engineering/Customer</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Support (%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Appendix G:

ECE Customer Site List
### Example ECAT Site List

<table>
<thead>
<tr>
<th>#</th>
<th>USCO</th>
<th>Account Information</th>
<th>Xerox Account Representatives</th>
<th>Misc.</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1</td>
<td>AON Consulting</td>
<td><strong>External District Support:</strong></td>
<td>Document Scan and Make Ready and WVS.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>10451 Mill Run Circle</td>
<td>Rodney Murphy – Acct. Manager – (410)-503-5009</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Owings Mills, MD. 21117</td>
<td>Karen McGuire – Analyst – (410)-583-5032</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Anne Knoch – CTS – (410)-583-5128</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Mark Reeves – FMCS – (410)-583-5154</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Larry Thompson – CSE – (410)-583-5182</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Weekly Call:</strong></td>
<td><strong>DISTRIBUTION</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Thom Schlawine – Proj. Engineer</td>
<td>409 Washington Avenue</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Greg Derwart – Proj. Manager</td>
<td>Towson, MD. 21204</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Vee Abe – Operator</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>410-363-5733</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td><strong>District Address</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>409 Washington Avenue</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Towson, MD. 21204</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>2</td>
<td>Credit Solutions</td>
<td><strong>External District Support:</strong></td>
<td>Document Scan-MakeReady, Document Library, WVS.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1243 Greenfield Drive</td>
<td>Tim Mulligan – Acct. Manager – (619)-260-3221</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>El Cajon, CA. 92020</td>
<td>Sam Cristiano – Analyst – (619)-260-3239</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Ellise Jackson – CTS – (619)-280-3213</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Bill Venable – FMCS – (619)-843-2883</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Anita Krask – (619)-280-3186</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Joe Stephens – CSE -</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Weekly Call:</strong></td>
<td><strong>DISTRIBUTION</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Mike Jones – Print Shop Supervisor</td>
<td>404 Camino Del Rio South, Suite 600</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>619-542-8200</td>
<td>San Diego, CA. 92108</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Mike Joplin –</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>619-542-8200</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>3</td>
<td>Interact Publishing</td>
<td><strong>External District Support:</strong></td>
<td>Document Scan-MakeReady and Document Library</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1914 Palomar Oaks Way</td>
<td>Dave Monastero – Acct. Manager – (619)-260-3227</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Carlsbad, CA. 92008</td>
<td>Sam Cristiano – Analyst – (619)-260-3239</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Ellise Jackson – CTS – (619)-280-3213</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Bill Venable – FMCS – (619)-843-2883</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Anita Krask – (619)-260-3186</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Joe Stephens – CSE -</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Weekly Call:</strong></td>
<td><strong>DISTRIBUTION</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>David Kessel – Print Services Super.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>619-448-1474, x-112</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>4</td>
<td>Safeco Insurance Co.</td>
<td><strong>External District Support:</strong></td>
<td>Document Scan and Make Ready.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>4729 154th Place NE</td>
<td>Terry Teal – Acct. Manager – (206)-241-1276</td>
<td>Customer has two Digipath's 15 miles apart. Will do peer-to-peer. Both Safeco sites will be part of ECAT.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Redmond, WA. 98052</td>
<td>Elayna Davis – Acct. Manager(XBS) –(206)-515-4528</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Safeco Insurance Co.</td>
<td>Robert Mahnke – DPME – 8*972-1383</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>SAFECO Plaza (0-1 Copy Center)</td>
<td>Scott Colterman – CAM(XBS) –</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Seattle, WA. 98185</td>
<td>Derek Sook – Analyst – (206)241-1322</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Customer Contact:</td>
<td>Cindy Roberts – CTS – 8*972-1289</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>425-702-6040</td>
<td>Sandy Marion – FMCS(Seattle) - 8*972-1271</td>
<td></td>
</tr>
</tbody>
</table>
Appendix H:

ECE Customer Information Document
Product X ECAT Test

Customer Information Document
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Test Objective

The purpose of this test is to introduce and evaluate a new version of the Product X 2.0 system software in a customer environment. This version of software provides several new features that customers have requested.

The specific objectives are as follows:

- Evaluate "pre-launch" versions of 2.0 system software and provide frequent feedback on reliability and software problem sets.
- Evaluate and confirm customer acceptance of new features operation and design intent.
- Determine the marketplace readiness of the product and its support services being tested.

Although we will be testing the support functions during this test (problem escalations to customer support centers, service support, etc.) ECAT is not intended to test all of the launch processes, i.e. distribution, order entry, spares, administration, etc. since these systems are currently operational.

Schedule

The schedule for this test will initiate with a visit to the customer site prior to, at the time, or shortly after the software install. This visit will be made by the Test Manager to set customer expectations and discuss the process for obtaining customer feedback.

Install of the Software will be scheduled by the District and will occur sometime around August 30, 1999. The Software will be installed by local Service District personnel with OTI (Order To Install) personnel from Rochester, NY observing some installs.

One software upgrade is planned for the middle of September. Another may be installed early in October at some sites. The intent is to provide improved reliability in addition to problem fixes identified by the customer.

The test is scheduled to conclude the second week of October. The Test Manager will then conduct a formal survey to obtain customer feedback of the new Product X 2.0 software and its support processes. The customer may keep the software, free of charge, after the test has completed. The final launch software will also be provided once it has been officially launched (planned 11/1/99).
Hardware & Software Installation

All sites will receive hardware, some with the current configuration and possibly some with the new hardware configuration. This will ensure that down time for problem investigation will not impact the customer's business if an emergency situation arises. Customers will NOT be asked to unplug and set aside the old system. Instead, Xerox would like the customer to use both systems to aid the customers production work. In order to perform upgrades in the field, some customers' systems will be migrated to new hardware and the upgrade performed. A backup of the old system, and restore to a new platform, will be performed by the service technician and the software upgraded to 2.0. Customers will be made aware that the jobs created and/or registered (in the database) on the new system will not be compatible with old software (not backward compatible).

There will be no charge for the test period and US customers are expected to purchase the system, transfer to a standard trial plan, or have the system removed when the test is complete.

Product X 2.0 Software Overview

All information regarding the new features of the Product X 2.0 software release can be found in the Customer Software Release Document. This document is part of the Customer Documentation Kit.

Current Software Limitations and Caveat Information

Included in the Product X 2.0 Customer Software Release document is a list of known problems (Caveats) and feature limitations that are currently in this version of software. Some problems have workarounds, others have to be avoided all together. Please review this documentation so that you are familiar with these
General Information

Xerox Contacts

Customer Support Center: 1-800-821-2797

Xerox Test Coordinator: Carmen Bottini  
Xerox Corporation  
800 Phillips Road,  
MS139-26A  
Webster, NY 14580  
(716) 422-4554  
FAX (716) 422-0040

Weekly Conference Call: 1-????-???-????  
(passcode: CBottini)

Security

Although there is no specific requirement for a physically secure customer facility during the course of this test, there is a strong requirement for absolute confidentiality on the part of the test customer.

Customer Support

Hotline Support

Xerox will provide support of the Product X 2.0 system questions and problems by calling the Customer Support Center (CSC) at:

1-800-821-2797

Please identify yourself as a "Product X Test Customer for software level 2.0" whenever calling the Customer Support Center. This will assist us in routing the call to the proper analyst.

Coverage for hardware related problems, is based on the customer's current Field Service Maintenance Agreement (FSMA).

Coverage for software related problems, for the test is based on a 1x5 matrix (one shift/ five days per week/ Monday through Friday/ 8:00AM to 5:00PM at customer location). Extended coverage is not available for this test since
Rochester, NY engineering personnel will be supporting the problem escalation path.

The Customer Support Center is the customer's primary vehicle for problem resolution and should be utilized as such. It is imperative that the hotline be the first contact for all software problems. This will ensure proper tracking and call escalation. Please ask for and record the call event number assigned by Customer Support for each problem called in. This is the only way program personnel can track your problem in the database system.

Software problems are tracked through the Customer Support Center via the Software Problem Action Request (SPAR) process. All SPAR's will be given a severity level of 4. Since this test is utilizing pre-launch software, problem fixes will be incorporated into future software releases, rather than issue patches for specific problems.

Customer Training

Xerox CBU personnel will train the Product X 2.0 ECAT customers on the enhancement and changes that are included in the software. This training will occur as soon as the system is functional. The training will take place at the customer site unless other plans are agreed upon.

Customer Documentation

Customer documentation will be provided for each account in hardcopy. This documentation is Launch intent but not final production version. A list of features and modifications to some features (Do's and Don't's) will be provided that will guide the operator during the day to day operations. It should be kept at the system. An updated CD version of the documentation will not be available during this test. The operators should utilize this documentation during the test and report any problems or comments they might have to the Customer Support Center and log them into the logbook.

Service Support

Install Time

The installation of the Product X hardware and software should be accomplished over a period of approximately 1 to 2 days.
Service Coverage

Service coverage for the test is based on the customer's current Field Service Maintenance Agreement (FSMA).

Spare Parts

Spare parts for the Product X System will be supplied through Xerox Corporation per the customer's FSMA contract.

Response Time

The average response time is expected to be 2 hours with a maximum of 4 hours.

CSTS / CSE Call Ahead

The CSTS / CSE will contact the customer to verify the problem and establish an estimated time of arrival.

Call Duration

Call duration for this test will vary depending upon the nature of the problem. For software related problems, calls will take longer to diagnose root causals of the problem.

Call Escalation

Call escalation will be provided if the nature of the problem is deemed critical and / or the CSTS / CSE is not able to resolve the problem. The on-site CSTS / CSE will be responsible for initiating the call escalation. Upon occurrence, contact would be made with the USCO Engineers for assistance and potential travel to the account. Next day arrival should be considered best case should this occur.

Site Preparation

The Xerox Analyst will work with the customer on planning and implementing any necessary installation site preparation activities, prior to install.
Telephone Requirements

There will be times when the Operator / Administrator will need to read the screen information from the client platform to the CSC. Therefore, it is necessary to provide a telephone in close proximity to the equipment so that the Operator / Administrator can easily view the screen while operating the system.

Customer Feedback Procedures

Customer Feedback

The customers test participants will be responsible for providing information and reactions to the product as specified in the Test Objectives to Xerox. The vehicles to provide this information will be:

- Each time the Customer Support Center is called for a problem, the hotline personnel as well as the customer should record the occurrence. Information including the date & time of the call, a problem description and a description of the corrective action taken should be recorded along with the event number assigned by Customer Support. These logs should be faxed each Monday of the week by 10am to the Xerox Test Manager who will be managing the test feedback – attn: Carmen Bottini. The fax number is (716) 422-0040. See Appendix A for sample form.

- Provide verbal feedback to Xerox support personnel on a weekly basis who will review the logs and determine the status of the "test" at the customers account. This will include participation in a weekly scheduled telephone conversation between Xerox personnel and the customers test participants. Xerox would like to schedule a convenient time for these weekly conference calls today, if possible, to assist in data preparation lead times. The telephone number for these weekly conference calls is 1-??-??-???? (passcode of CBottini).

- In certain cases, Xerox may request the customer to provide a problem job (in electronic form) to Xerox so that the problem may be recreated. It is therefore requested that the customer save electronic masters of any jobs that they may have a significant problem with, in case the Customer Support Center requests the job. The customer would then put the job(s) on the appropriate media and mail it into the CSC. An appropriate problem description should also be noted in the above operator log.
• Record weekly scan volume if possible and include on weekly problem report.

• Participating in a survey to assess Customer Satisfaction at the beginning of the test (for baseline purposes) and toward the end of the test.

It is expected that a Xerox representative may visit the account on occasion. Alternatively, this representative may call the site manager and/or operators directly to discuss system, problems, issues, performance, etc.

All observer trips will be scheduled in advance by the Xerox Test Manager and will be at the convenience of the customer.
Appendix I:

ECE Test Survey
Product X 2.0 Customer Satisfaction ECE Survey
QUESTIONNAIRE
08/16-19/99 version

Respondent Name ........................................ Date _____/_____

Position/Title ................................................... Interviewer ..............................................................

Company Name .......................................................... ..............................................................

Phone ................................................................. Department ..............................................................

Type of Business .................................................. Respondent ID# ..............................................................

I would like to ask you a series of questions about your satisfaction with the PRODUCT X SYSTEM itself including such items as your satisfaction with the Features, Reliability, Performance, and Ease of Use.

We will be using a 10 point scale where:
9 & 10 are Very Satisfied
7 & 8 are Satisfied
5 & 6 are Neutral (neither satisfied or dissatisfied)
3 & 4 are Dissatisfied
1 & 2 are Very Dissatisfied.

1a. How satisfied are you with the ease of use of the PRODUCT X system?

☐ 10 = Very Satisfied    ☐ 5
☐ 9                  ☐ 4
☐ 8                  ☐ 3
☐ 7                  ☐ 2
☐ 6                  ☐ 1 = Very Dissatisfied

1b. In what way can we improve the ease of use?

__________________________________________________________________________________________

__________________________________________________________________________________________

__________________________________________________________________________________________

__________________________________________________________________________________________

__________________________________________________________________________________________
2a. How satisfied are you with the reliability of the PRODUCT X system?

Some of the items to consider are:
- Faulted Jobs (job won’t convert)
- Job Integrity (printed output correct)
- Time to process & convert jobs
- Software lock-ups
- Requirement to re-submit jobs to complete them
- If system needs frequent servicing by Xerox
- Availability of the system to you
- Running long jobs without shutting down

☐ 10 = Very Satisfied ☐ 5
☐ 9                           ☐ 4
☐ 8                           ☐ 3
☐ 7                           ☐ 2
☐ 6                           ☐ 1 = Very Dissatisfied

2b. In what way can we improve the reliability?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

3a. How satisfied are you in general with the current features and capabilities of the PRODUCT X system?

☐ 10 = Very Satisfied ☐ 5
☐ 9                           ☐ 4
☐ 8                           ☐ 3
☐ 7                           ☐ 2
☐ 6                           ☐ 1 = Very Dissatisfied

3b. What features or capabilities would improve the PRODUCT X system in your environment?

3c. How important would that be to you? Would you say that feature would be: Critical, Important, or Nice To Have?

<table>
<thead>
<tr>
<th>Q4b. Features</th>
<th>Q4c. Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

59
I would now like to ask you some questions about your satisfaction with the SUPPORT you have received on your PRODUCT X SYSTEM.

4a. Did you have any calls to the Xerox Customer Support Hotline on the PRODUCT X system?
   
   Yes _____  No _____

4b. If yes, how satisfied are you with the support you received from the Xerox Customer Support Hotline on the PRODUCT X system?
   
   □ 10 = Very Satisfied  □ 5
   □ 9         □ 4
   □ 8         □ 3
   □ 7         □ 2
   □ 6         □ 1 = Very Dissatisfied

4c. In what way can we improve the support you receive from the Xerox Customer Support Hotline on the PRODUCT X system?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

5a. How satisfied are you with the applications and network support you received from your Xerox Systems Analyst on the PRODUCT X system?
   
   □ 10 = Very Satisfied  □ 5
   □ 9         □ 4
   □ 8         □ 3
   □ 7         □ 2
   □ 6         □ 1 = Very Dissatisfied

5b. In what way can we improve the support of your Xerox Systems Analyst?
6a. How satisfied are you with the support provided by Xerox Service on the PRODUCT X system?

☐ 10 = Very Satisfied  ☐ 5
☐ 9                      ☐ 4
☐ 8                      ☐ 3
☐ 7                      ☐ 2
☐ 6                      ☐ 1 = Very Dissatisfied

6b. In what way can we improve the support of your Xerox Service representative?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

7a. How satisfied are you with the product training you received?

☐ 10 = Very Satisfied  ☐ 5
☐ 9                      ☐ 4
☐ 8                      ☐ 3
☐ 7                      ☐ 2
☐ 6                      ☐ 1 = Very Dissatisfied

7b. In what way can we improve the training?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

8a. How satisfied are you with the documentation you received for the PRODUCT X system?

☐ 10 = Very Satisfied  ☐ 5
☐ 9                      ☐ 4
☐ 8                      ☐ 3
☐ 7                      ☐ 2
☐ 6                      ☐ 1 = Very Dissatisfied

8b. In what way can we improve the documentation?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
I would now like to ask you some questions about your overall satisfaction with the PRODUCT X system.

9a. How satisfied are you overall with the PRODUCT X system meeting your requirements as expected?

☐ 10 = Very Satisfied  ☐ 5
☐ 9                      ☐ 4
☐ 8                      ☐ 3
☐ 7                      ☐ 2
☐ 6  ☐ 1 = Very Dissatisfied

9b. If the response to the above question is not a "10", ask the following question.
What one or two things could Xerox do to move you to a "10" on having the PRODUCT X system meet your requirements?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

10a. How satisfied are you with Xerox overall?

☐ 10 = Very Satisfied  ☐ 5
☐ 9                      ☐ 4
☐ 8                      ☐ 3
☐ 7                      ☐ 2
☐ 6  ☐ 1 = Very Dissatisfied

10b. Why do you say that?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________
11a. Considering the present performance of the PRODUCT X System with its features and the support you are receiving, how would you assess the PRODUCT X software product’s offering readiness to launch?

Please use a 10 point scale where:

- 9 or 10 super, definitely Launch Ready
- 7 or 8 better than what I have, but there are some bugs in the system
- 5 or 6 not quite Launch Ready - too many bugs in the system that seriously interrupt production
- 1 to 4 not Launch Ready at all

[ ] 10 = Launch Ready
[ ] 9
[ ] 8
[ ] 7
[ ] 6
[ ] 1 = Not Launch Ready

11b. Why do you say that?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

12. Do you have any other comments you would like to make?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
Appendix J:

ECE Test Survey Results
## Example ECAT End-of-Test Phone Survey

<table>
<thead>
<tr>
<th>Question</th>
<th>Site #1</th>
<th>Site #2</th>
<th>Site #3</th>
<th>Site #4</th>
<th>Site #5</th>
<th>Site #6</th>
<th>Site #17</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. How satisfied are you with the EASE of USE of the XXX system?</td>
<td>10</td>
<td>8</td>
<td>9</td>
<td>9</td>
<td>9</td>
<td>10</td>
<td>8</td>
<td>8.6</td>
</tr>
<tr>
<td>2. How satisfied are you with the reliability and performance of the XXX system?</td>
<td>10</td>
<td>10</td>
<td>9*</td>
<td>9</td>
<td>9</td>
<td>8*</td>
<td>8</td>
<td>8.6</td>
</tr>
<tr>
<td>3. How satisfied are you with the current features and capabilities of the XXX system?</td>
<td>9*</td>
<td>8*</td>
<td>8</td>
<td>10</td>
<td>8*</td>
<td>7*</td>
<td>8*</td>
<td>8.1</td>
</tr>
<tr>
<td>4. How satisfied are you with the support you received from the Xerox Customer Support Hotline?</td>
<td>9</td>
<td>7*</td>
<td>9</td>
<td>10</td>
<td>8</td>
<td>10</td>
<td>Not utilized</td>
<td>8.8</td>
</tr>
<tr>
<td>5. How satisfied are you with the application support you received from your Xerox System analyst?</td>
<td>10</td>
<td>9</td>
<td>8</td>
<td>9</td>
<td>Not utilized</td>
<td>10</td>
<td>9</td>
<td>9.0</td>
</tr>
<tr>
<td>6. How satisfied are you with the Service support received from Xerox Service?</td>
<td>10</td>
<td>8</td>
<td>8</td>
<td>9</td>
<td>9</td>
<td>10</td>
<td>6</td>
<td>8.2</td>
</tr>
<tr>
<td>7. Did you receive any training and how was it?</td>
<td>See below</td>
<td>No Training*</td>
<td>No Training</td>
<td>No Training*</td>
<td>No Training</td>
<td>10</td>
<td>6</td>
<td>8.0</td>
</tr>
<tr>
<td>8. How satisfied are you with the documentation you received?</td>
<td>NA*</td>
<td>8</td>
<td>9</td>
<td>9</td>
<td>7*</td>
<td>10</td>
<td>6</td>
<td>8.0</td>
</tr>
<tr>
<td>9. How satisfied are you overall with the XXX system meeting your requirements?</td>
<td>10</td>
<td>9</td>
<td>9</td>
<td>9</td>
<td>9</td>
<td>9*</td>
<td>8.6</td>
<td></td>
</tr>
<tr>
<td>10. How satisfied are you with Xerox overall during this test?</td>
<td>10</td>
<td>9*</td>
<td>9</td>
<td>10</td>
<td>8*</td>
<td>9</td>
<td>10</td>
<td>8.9</td>
</tr>
<tr>
<td>11. Considering the present performance, features, and support of the XXX system, how would you assess the products “Readiness for Launch?”</td>
<td>10</td>
<td>9*</td>
<td>9*</td>
<td>9</td>
<td>10*</td>
<td>10</td>
<td>7*</td>
<td>8.9</td>
</tr>
</tbody>
</table>

* Averages calculated based upon the number of customers who gave a numeric answer to the question.*
Additional Comments

Site #1
Question #3 – Would love to have “automatic centering” for documents.
Question #7 – Received very basic training, cannot put a rating to it.
Question #8 - Can’t remember using the documentation.
General Comments – “No problems with R11 at all, definitely a win situation for us with this product”
“Going to move more work to the system because of the success of this test.”

Site #2
Question #3 – Need interrupt/proof and PDF Level 4
Question #4 – Very difficult to try and reach a particular person at the hotline.
Question #7 – Some training would have been nice.
Question #10 – This test was the most pleasant and smoothest experience we have had with Xerox.
Question #11 – No problems at all.

Site #3
Question #2 – Printer faults decreased when R11 was installed.
Question #11 – Very good product. Test was great, although longer than expected. Very satisfied with results.

Site #4
Question #7 – Lack of training was the only stumbling block of the test.

Site #5
Question #3 – Would love interrupt/resume. Does not like how font substitution works with PDF jobs (feature request written).
Question #8 – Not easy to navigate through all books. Would like an index or quick-find book.
Question #10 – Customer was treated shabbily during the “XXX causing XXX software deletion” problem. Xerox wouldn’t listen to us.
Question #11 – Very, very solid software.
Site #6
Question #3 – Really need interrupt/proof.
Question #7 – Lack of training is the biggest knock on the test.

Site #7
Question #3 – Really need interrupt/proof.
Question #7 – Training not needed.
Question #9 – Reply would be a 10 if it had interrupt.
Question #11 – XDS has a problem with large files, problem is fixed with next release of Common Client.