

Team Charter:

Charter Summary: The technology team has taken on the responsibility to resolve the issue with the Xerox Secure Print and program the personal security code for each SPD staff member. This process is more productive and time can be spent more efficiently. Additionally, the printouts will no longer be shuffled with other employees' printouts. Less time spent sorting out copies on the Xerox machine or figuring out which copy belongs to who.

Project Mission:

- Schedule weekly meeting on Thursdays.
- Draft and complete the SPD employee survey, email it to staff and ask for a response by close of business Monday 1/27/2014.
- Compile and tabulate survey feedback on a spreadsheet.
- Work to resolve the technology needs of SPD.
- Work as a team and provide ideas to complete task in a timely manner.
- Streamline the process to work efficiently and effectively.

Objectives:

- Install the latest driver for each Xerox in SPD on the scan server at HITS
- Map PCs to the latest drivers
- Program the Xerox driver to accept secure prints for all SPD staff
- Ensure each staff member chooses their own personal codes for each Xerox machine they are mapped to

Deliverables:

- Dedicated 32 bit server was built for SPD's PCs 2/14/2014
- Latest drivers were installed on the 32 bit server at HITS 2/14/2014
- Secure Print for SPD is delivered completely 2/14/2014
- Employee list of primary and secondary printers established on 2/26/2014
- Step by step instructions for secure print and map print drivers
- Second phase roll-out to remove old printer drivers on 2/28/2014
- Secure Print training completed on 3/5/2014
- SPD motivated Xerox to provide additional training to SPD staff on copiers
- Lessons learned document on 3/18/2014



Overall Workplan:

Week 1
1/27 – 1/31

Week 2
2/3 – 2/7

Week 3
2/10 – 2/14

Week 4
2/17 – 2/21

Activities

- Team met on Thursday decided to meet every Thursday at 2:00 PM.
- Completed a survey on the various issues of concern.
- consulted among each other the steps to move forward.
- The team will meet with HITS and Xerox to resolve the driver issue and plan for a new driver installation and rollout of the secure print.
- HITS placed the new drivers for secure print on a 32 bit server and SPD rolled out the drive mapping and completed the task for all staff.
- Xerox determined old drivers were not completely removed from SPD PCs.
- Xerox instructed the team to remove old drivers before they conducted the training on Secure Print.

Deliverables

- Team agreed on meeting days and times. Results of the survey are tabulated for business case backup.
- SPD, HITS and Xerox agreed to resolve the issue. The decision has been made to build a new 32 bit print server instead of using direct IP printing to resolve the secure printing issue. The server should be completed by the close of business Friday 2/7/14.
- Secure print rollout is 100% complete.
- Team agreed to Xerox recommendations and planned the second phase rollout.



Overall Workplan:

Week 5
2/24 – 2/28

Activities

- Team removed old drivers from employees' PCs as planned.
- Team conducted one-on-one training sessions to SPD staff as needed.

Deliverables

- Team delivered the old driver removal and training by Friday 2/28/2014.

Week 6
3/3 – 3/7

- Team determined that removal of the old drivers prematurely was a mistake and did not agree with HITS business practice.
- Equipment, drivers, etc... need to remain with the client for at least 30 days to ensure stability.
- Xerox was contacted to follow up on the training with SPD.

- Team fully delivered on this assignment that included new driver setup, mapping, configuration and training.

Week 7
3/10 – 3/14

- Step by step instructions for secure print and map print drivers.
- Lessons learned document
- Folders are created in SharePoint for all SPD Improvement Teams to utilize and publish their final project documents.

- Team agreed on the final deliverable to be presented to the CPO for approval and posting on SPD SharePoint.

Week 8
3/17 – 3/21

- Team met and agreed to schedule a meeting for Thursday 3/27/2014 to finalize the Secure Print Project.

- Final document to be presented at meeting.
- Lamination sheets for the step by step instructions were purchased for this project.



Overall Workplan:

Week 9
3/24 – 3/28

Week 10
3/31 – 4/4

Week 11
4/7 – 4/11

Week 12
4/14 – 4/18

Activities

- Team met on Thursday 3/27/2014 with 2 of the coaches to discuss the closing of this project.
- Gaps in the document were filled by all the input given from the team.

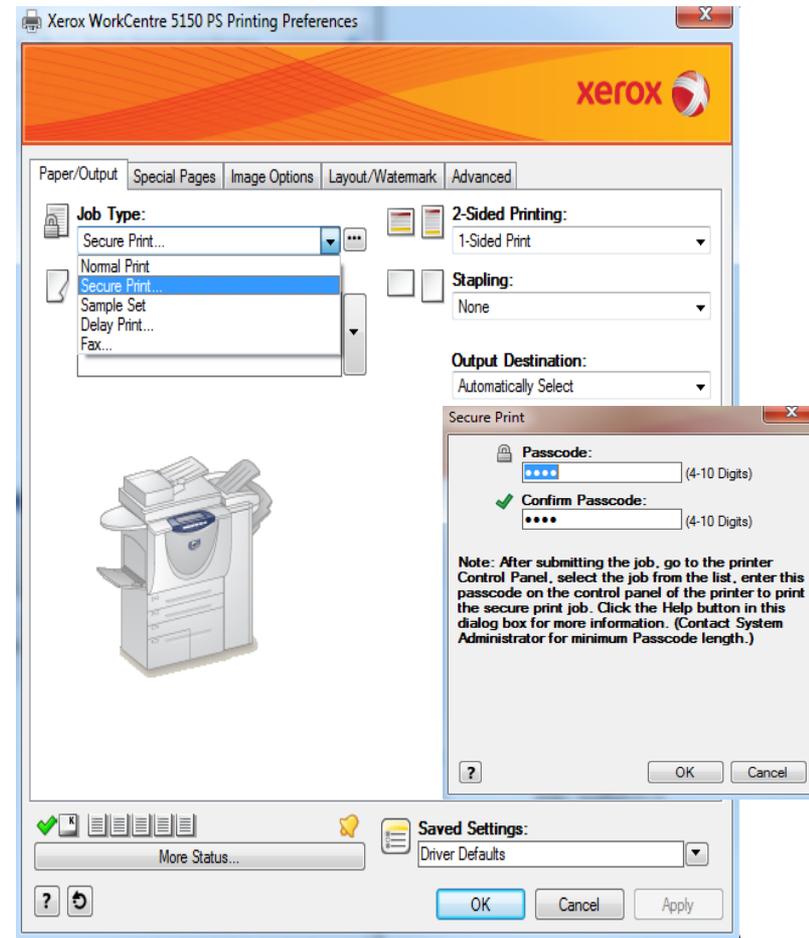
Deliverables

-
- Secure Print Project completely delivered.
 - Awaiting approval from CPO.
 - Upon approval, document will publish on SharePoint.
 - Step by step instructions will be posted by each Xerox copier in the Division.



Step by step instructions for Secure Print:

1. Click on the Start button of your Windows screen
2. Select **Devices and Printers**
3. With your Mouse, right click on the printer you are assigned to
4. Select **Printing Preferences**
5. Click on the Dropdown Selection under **Job Type**
6. Change the selection from Normal Print to **Secure Print**
7. Enter the **Passcode** of your choosing
8. Confirm the **Passcode**
9. Click **OK** to close the Secure Print Window
10. Click **Apply** on the Xerox Printing Preferences Window
11. Click **OK** on the same Window to close
12. You are now setup for **Secure Print**



Step by step instructions for Xerox Copier:

Finance SPD Suite 100

Model: 7835

S/N: MX0137522

Fax: 832-393-8755

Nancy.Mccleary@xerox.com

Phone: 832-642-2420

Phone: 1-888-644-3522

To Print Multiple Copies

- **Press Job Status**
- **Select Employee Number**
- **Enter Secure Code**
- **Job To Print**
- **Select Release**
- **Select Print**



Step by step instructions for Xerox Copier:

Finance SPD Suite 200

Model: 5135

S/N: VXW019898N

Fax: 832-393-8799

Nancy.Mccleary@xerox.com

Phone: 832-642-2420

Phone: 1-888-644-3522

To Print Multiple Copies

- **Press Job Status**

- **Select Employee Number**

- **Select Release**

- **Enter Secure Code**

- **Select Confirm**

- **Select Print**



Step by step instructions for Xerox Copier:

Finance SPD Suite 300

Model: 5335

S/N: AE9122815N

Model: 7220

S/N: LX5684937

Fax: 832-393-8799 B/W

Fax: 832-393-8770 COLOR

Nancy.Mccleary@xerox.com

Phone: 832-642-2420

Phone: 1-888-644-3522

To Print individually Copies

- Press Job Status
- Select Employee Number
- Select Release
- Enter Secure Pass Code
- Select Enter

To Print Multiple Copies

- Press Job Status
- Select Secure Print Job & More
- Select Secure Print
- Select Your Employee Number
- Select Job List
- Enter secure Password Code
- Select Confirm
- Select the Select All
- Select Print



Step by step instructions for Xerox Copier:

Finance SPD Suite 400

Model: 5335

S/N: AE9898236

Fax: 832-393-8799

Nancy.Mccleary@xerox.com

Phone: 832-642-2420

Phone: 1-888-644-3522

To Print individual Copies

- Press Job Status
- Select Employee Number
- Select Release
- Enter Secure Pass Code
- Select Enter

To Print Multiple Copies

- Press Job Status
- Select Secure Print Job & More
- Select Secure Print
- Select Your Employee Number
- Select Job List
- Enter secure Password Code
- Select Confirm
- Select the Select All
- Select Print



Step by step instructions for Xerox Copier:

Finance SPD Suite 500

Model: 5150

S/N: VXX063775N

Fax: 832-393-8799

Nancy.Mccleary@xerox.com

Phone: 832-642-2420

Phone: 1-888-644-3522

To Print Multiple Copies

- **Press Job Status**
- **Select Employee Number**
- **Select Release**
- **Enter Secure Code**
- **Select Enter**



Lesson Learned:

Technology Team

“We learn by pushing ourselves and finding what really lies at the outer reaches of our abilities.” -Josh Waitzkin-

Introduction

Lessons can be *taught* in any environment and in any situation, however, the key is *learning* and *retaining*. As the Technology Team pondered over what areas of SPD to improve, we ran into several road blocks, several “U” turns and several dead ends. Nevertheless, we trekked on and found viable options that would benefit SPD and the City as a whole. Perseverance and hard work created positive outcomes that can now be shared and reflected upon in the future.

Lessons Learned Approach

The lessons learned, from the Xerox Secure Print Project, are compiled in the activities and deliverables section of the Team Charter. As the group identified the wants, needs and “must haves” of the department, we documented, met with several departments and hashed out the details to make the project successful.

Lessons Learned Knowledge Base

The group initially identified the Subject Matter Experts (SME's) needed to fulfill the needs of the project and proceeded to contact and arrange meetings with each party to brainstorm, document and test theories that would ultimately create the optimal solution. The SME's consisted of personnel from the following departments:

- HITS;
- Xerox;
- SPD; and
- Finance

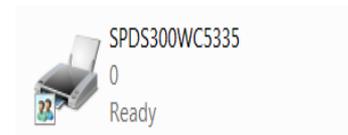
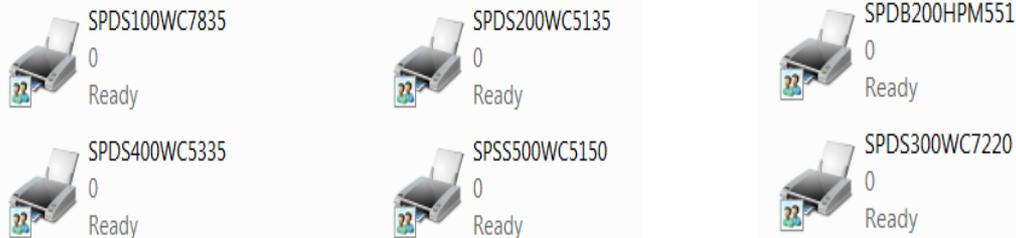
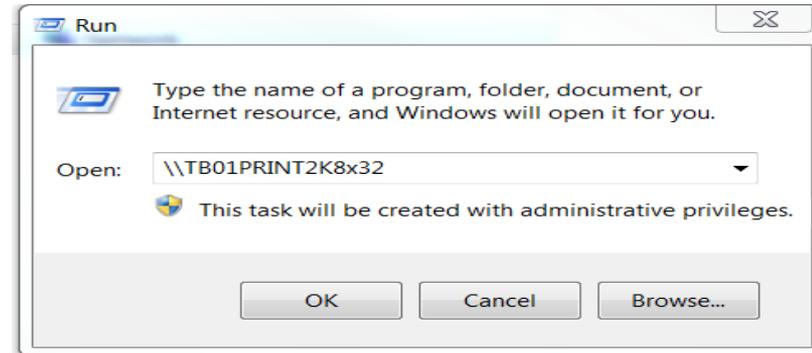
Process Improvement Recommendations

SPD did not have a verified process for setting up secure print on new Xerox machines. Therefore, the team was successful in receiving a dedicated 32 bit server, installing the drivers for the new server on all machines, creating step-by-step instructions for installation and encouraging Xerox to provide continuing education on existing and new machines as needed. This proactive approach will allow all users to have uniform information and ongoing support.



Guide to Rolling Out Xerox Print Drivers:

- Left click on the Start button, select Devices & Printers.
- Identify and list down the old print drivers displayed. The old print drivers names should start with either TB01.. or TA01...
- To download and install the new print drivers, left click on the Start button, select Run and type in the print server name as shown in the image on the right hand side.
- Click on OK. The list of 32X bit print drivers will be displayed. Note the naming convention of the print drivers. First 3 alpha denotes SPD, the next 3 digits denotes the suite number and the last 6 alpha numeric is the model of the Xerox machine in the suite.



- Review the list for users and printers. Determine which are the print drivers required for the user. Double click on the print driver one at a time to download.
- Once all the print drivers are downloaded, determine which print driver is to be set-up as default for printing. Right clicking on the selected print driver, and click on Set as default printer.

- Test printing using all the print drivers. If all print drivers work, delete the old print drivers and then refer to the Secure Print Set-Up guide to configure the secure print for all the print drivers.
- If the printing does not work, list down the problem and contact Joe Rocha at 832-395-7059.

