

August 18, 2016



Output Management Metrics & Accessibility

IT Management Briefing

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Briefing

This Session Will Discuss...

- A little about the City Output Management team
- A look at two 2016+ major initiatives: *Metrics* & *Accessibility*
 - *Metrics*
 - What has gone before [Print studies over the years...]
 - Why output metrics are important
 - A look at possible tracking solution for output costs, cost saving alternatives, and going forward
 - *Accessibility*
 - AODA and the need for accessible documents
 - Indexing, Metadata, Classification, getting ready for *eDRMS* and *OpenText*
 - Toolsets, integrations, VPSX front-end support, some recommendations

Enterprise ~~Print~~ OUTPUT MANAGEMENT

Actually a complete misnomer...

- Small team, part of TIS Enterprise System Products
- Mandate for high end, specialty document processing and composition [if it's weird, they do it in essence...]
- Won an IT Service Award in 2015 vs. 39 other teams
- Recently upgraded to the VPSX Output Management System
- Just ran their 5th DRP Exercise at Tiffield [using automated hot sparing]
- More electronic documents, composition, portalization, than print
- Now handling Provincial File Transfer as well
- key clients: SAP, Pensions, PTMS, Court Services et al
 - continually innovating new solutions
 - high volume integration
 - print to archive ViewDirect [leading to OpenText]
 - print to e-mail [potential migration to *Accellion*...]
 - secure City document initiative [PDF417 + PKI]



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2016 Metrics Project: The Why

- **Green Team** at City Hall asked IT Division two “simple questions “ in 2015:

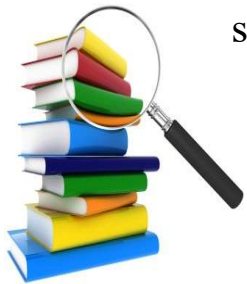


typical City cubicle

- *can the City **track** all its current print volume?*
- *given the above, can we **do something** about it?*
[reduce costs, volume, impact on environment, etc.]
- Sent to Output Management team for answer
- Answer is not a simple one, alas
- Team did a **Lunch n' Learn** Briefing for them

What has gone before

At least five studies in ten years...



- Starting in 2005, the City has commissioned *multiple* print studies...
 - Clerks Division External Mail Study
 - Two internal studies via IT Division
 - Two external studies, *Print Operations Group* as consultant
- Studies interviewed multiple City Divisional clients in detail
- Looked at print behaviours and usage across the board
- All studies recommended the same thing as *first* principle:
 - The City must track our metrics of all print behaviours
 - Without adequate metrics there was no point in setting policy
- Interestingly, by letting people know we are tracking metrics this has a positive effect on behaviour without setting policy
- We have never fully implemented these recommendations [outside of network printing metrics & high volume *“islands”*]

enterpriseprint^e



Intelligent Mail Production
RFP no. 9145-04-7421

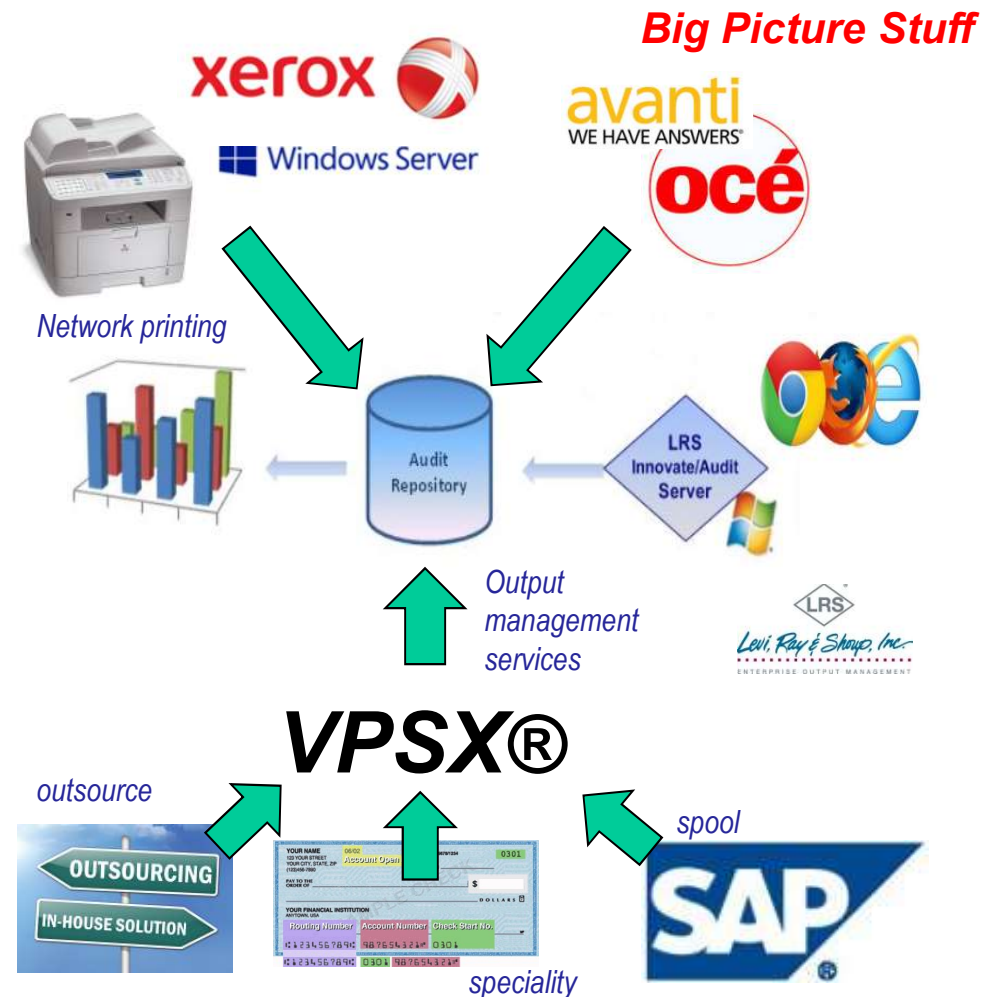
Metrics are Important

- Knowledge is power
- We need to understand some of the behaviours with print
 - what is regular business printing
 - what is application printing i.e. Outlook, SAP, etc.
 - what is specialty printing i.e. Permits, Notice of Trial, cheques
- Given the above, are we printing too much? or expensive choices?
 - are we making good use of high volume, print to archive, print to e-mail and other alternative methods?
- Do we have the means to set policy? nagware, alternatives in place, etc.
- Can we effectively measure policy changes if we make them?
- What is the City printing to outside service providers, what are our costs here?
 - Can we better leverage in-sourcing vs. out-sourcing?
- We need to let City staff know that printing *always* costs the City *something*



Step 1: A Dashboard Solution

- LRS Innovate has web-based reporting solution
- Takes input from MS-Print Server/Xerox and VPSX Output Management system out of box
- Can import from Avanti High Volume without too much trouble
- Available to all City users
- Can use *Directory Services* to add ODDSUB information
- Can monitor other output solutions i.e. archive, e-mail, outsource
- Solution is vendor agnostic, hooks to any output device



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Step 2: Policy Control on Network Printing

- Software monitors all print jobs from workstations to local printers
- We have 3,000 local printers or so to monitor
- Does a pop-up of real print cost for each print
- *Velvet Glove in Iron Fist* approach, we don't apply policy only monitor it
 - Print Operation Group analysis: 10-30% improvement in behaviour just by reporting on it
 - only apply policies after a year, after we really understand the issues
 - look at some behaviour changes i.e. duplex usage, printing e-mails multi-up etc.
- There are a number of vendors and tools in this space, will have to go out to RFP
- Affectionately known as *“nagware”*

Controlling local printing



Low Cost Alternatives: Print to e-mail

Key business enabler

- Handles PDF formatted documents
- Pre-verifies City e-mail address via *Directory Services* [major error reduction]
- Compresses files to *pkzip* attachments
- Includes multiple recipient support
- Handles mailing lists, staff and non-staff entries
- We handle thousands of SAP e-mail transactions weekly
- Massive cost saving to City in pages **not** printed
- Clearly a huge boost to business efficiency i.e. delivering *Purchase Orders*
- Will be generally available via *VPSX* to *all* City applications
- Can be ported to *Accellion* file sharing instead, takes load off *Outlook*, no attachment size limitation, no archive, no long-term retain
- Flash: *Accellion* Enterprise plug-in for *all* attachments



Low Cost Alternatives: Print to Archive

- Handles *Court Services* docket and ICON report traffic with fully automated document gateways
- Also used by SAP for invoice imaging, SAP reports
- *ViewDirect* saves thousands of printed pages per week
- *ViewDirect* has standard web portal interface
- VPSX gateways move documents to *ViewDirect* archiving via SFTP handshaking
 - We can provide indexing assistance
 - We can provide PDF formatting as necessary
- eDRMS initiative will eventually replace with a better solution [guessing 3 years?]

**Critical service for
Courts Services and SAP**



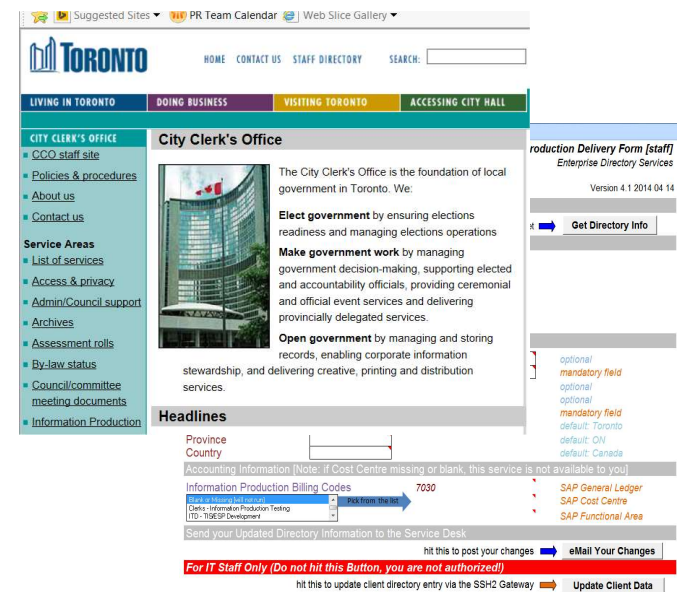
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Low Cost Alternatives: high volume print

- Clerks IPDS has Oce Digital Presses in each Civic Centre, 3 in CH, 2 in MH
- Have unbundled operator costs per page, now very cheap solution [paper and toner]
- Have standard drivers for Windows
- We also support VPSX engine for specialized City transactional work i.e. SAP, PTMS

- New engine supports JDF
- We can provide PDF formatting
- We support billing and bannering via *Directory Services*
 - we provide a simple e-form for setting this up
 - directly connects to Avanti system, client just prints their job

Through every Civic Centre

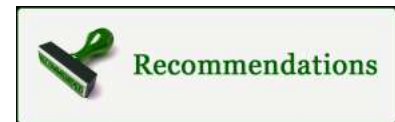



The screenshot shows the 'City Clerk's Office' directory services form. It includes a sidebar with navigation links like 'CITY CLERK'S OFFICE', 'Service Areas', and 'Information Production'. The main content area describes the office's role in managing government operations and provides a form for submitting directory information. The form includes fields for Province, Country, Accounting Information, and Information Production Billing Codes. It also features a 'Send your Updated Directory Information to the Service Desk' section with a 'hit this to post your changes' button and a warning: 'For IT Staff Only (Do not hit this Button, you are not authorized!)'. A final 'Update Client Data' button is at the bottom.

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Recommendations on Going Forward: For City Management

- We need better **composition** tools for electronic documents
- Need to acquire **metrics** dashboard print reporting and costing tool [RFP 2017 but 2016 a decent possibility, have some money]
 - Output Management team will be champion/steward
- Need to acquire **policy control** local print and cost monitoring software [RFP 2017 at the earliest]
 - Desktop team will be the champion/steward
- Other print solutions should be looked at in light of coming consolidated services with ABCs, i.e. what is best of breed:
 - VPSX output management system approach
 - can send print jobs to other gateways, portals and services
 - High Volume digital press interface + IPDS solutions
 - standard PDF, JDF and Directory Services approach
- Recommend ramping up **Accellion** solution for print to e-mail, see what we can do for workstation prints vs. application work
- Print to archive needs review in light of **eDRMS** strategy, and need to replace **ViewDirect** eventually [three years away at the earliest, if contracts signed today]




2016 Accessibility Project

- The Ontario Access to Disabilities Act [AODA] is coming
 - pressure on all governments to be compliant soon
- Currently we either do *manual* accommodations *or* our applications simply *aren't* compliant
- All City applications and documents have to be accessible
 - easily convertible to other formats for accessibility readers
 - including the necessary *metatag* and content label information
 - documents need better logical layout and structure
- Tools are available to make standard PDF into PDF/UA
 - we are adding PDFlib 9.0 support to our basic transforms
 - *metatag* support into PDF templates, add to *xml2pdf* transform
 - should add *Crawford Technology* tools for automated mark-up
 - can be added as a service layer between *VPSX* and *OpenText*
 - thousands of City document types can be configured if we wish

Looking ahead...

- 



Dublin Core Metadata Initiative


Making it easier to find information

The Dublin Core Metadata Registry

The [Dublin Core Metadata Initiative's](#) Metadata Registry is an application designed to enable users to explore the DCMI vocabulary in a way that simplifies the discovery and navigation of terms and their definitions, and that illustrates the relationship between terms. The goal of the Registry is to promote the discovery, reuse and extension of existing semantics, and to facilitate the creation of new vocabularies.

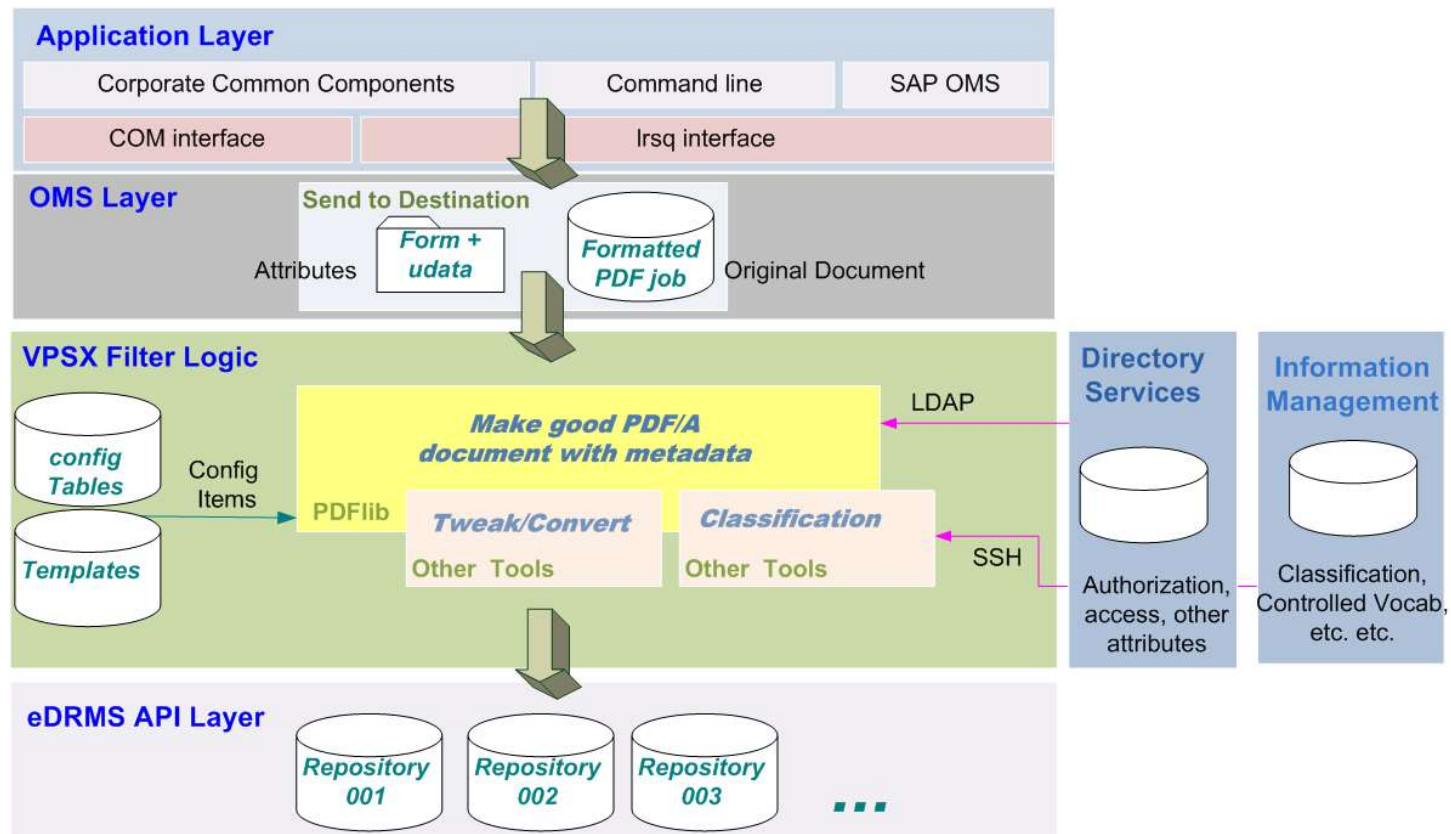
Help	Preferences	Search	Administration
Please select from one of the following supported languages or click on the multilingual link above for additional options.	English [en-GB] Catala [ca-CZ] Dansk [da-DK] Deutsch [de-DE] Español [es-ES] Français [fr-FR] 日本語 [ja-JP] 한국어 [ko-KR] Português [pt-PT] Polski [pl-PL] Română [ro-RO] Svenska [sv-SE] ไทย [th-TH] 繁體中文 [zh-CN]	Catalan [ca-ES] Cymraeg [cy-GB] Deutsch [de-DE] English [en-US] Slovenian [sl-SI] Italiano [it-IT] 한국어 [ko-KR] Norsk [no-NO] Português [pt-PT] Svenska [sv-SE] Slovenščina [sl-SI] 繁體中文 [zh-TW]	

♦ DCES only translations



OMS to eDRMS Service

**Architecture Diagram we gave
CIMS eDRMS team...**



OMS to eDRMS integration model

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New Document Service: Tagging & Metadata

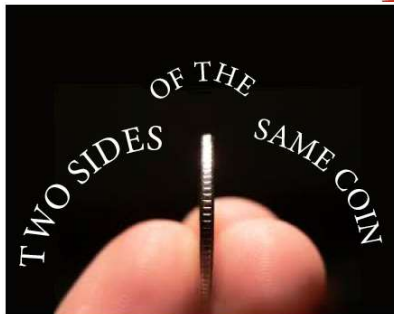
- OMS middleware classification tools can make structured PDF documents
 - from this we can make PDF/UA [in addition to PDF/A]
- PDF/UA can be used to drive other accessibility and accommodation client requirements fairly easily
- Recommend archiving PDF/UA documents with PDF/A documents
- Tagged documents are also easily archivable and searchable in eDRMS



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Some Recommendations to IT Management

- Use necessity of City Applications being AODA compliant to drive change
 - add necessary tagging tools to TIS infrastructure
- Although ostensibly for Accessibility Compliance tagged documents are *also* now completely archivable and searchable within an eDRMS system
 - if you do one, it pays for the other for *free*
- Accessibility becomes the “*Big Stick*” like Y2K to make eDRMS systems like OpenText a complete success
- The City has had multiple eDRMS project failures based on intake integration



We get this...

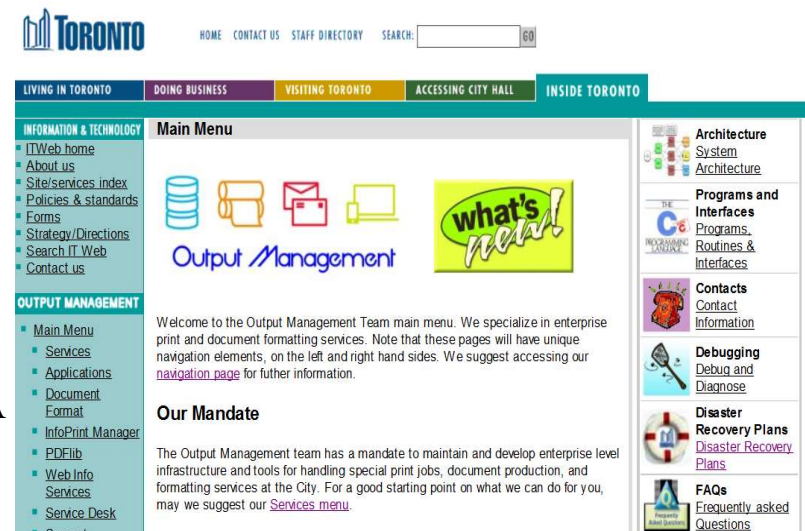
...by using that



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Finding Out More About Output Management

- Call team 416 397 1995 or e-mail epteam@toronto.ca
- Send Information Request through Service Desk
- Access their internal website
 - Continual work in progress, happy to work with anyone on new solutions to print and documents
 - Working on more document composition material
 - Their PDF solutions presented to EA and CIMS Forms Management teams
 - Converting Court Services, SAP, PTMS, PPFA solutions via our new PDF engines
 - <http://insideto-dev.city.toronto.on.ca/eprint> [their general site]
 - *Flash: New site will be on new accessible City Standard, just started evaluations!*



The incredible value of e-mail attachments...

Thanks!



"Do you have any other collateral...
besides this e-mail from a Nigerian prince?"

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CORPORATION

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