

**ICL Pathway**

**Resolution Plan**  
**Acceptance Incident 218**

Ref: CR/ACD/218  
Version: 0.5  
Date: 23/9/99

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**Document Title:** Resolution Plan for Acceptance Incident 218

**Document Type:** Resolution Plan

**Abstract:** This document contains ICL Pathway's plan to Close  
Acceptance Incident 218

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**Distribution:** Expert:  
Peter Copping  
  
ICL Pathway:  
  
Library  
  
POCL:  
Steve Grayston  
John Meagher  
Min Burdett  
Jeff Austin

**Author:** W M Foley

**Comments to:** Pathway list

**Comments by:**

## 0 Document control

### 0.1 Document history

Version	Date	Reason
0.1	20/8/99	Initial draft for comments
0.2	16/9/99	Agreed Resolution Plan
0.3	22/9/99	Amended following POCL feedback
0.4	22/9/99	To include critical success factors
0.5	23/9/99	Further updates arising from drafting of Schedule 2 Part A of the second supplementary agreement

### 0.2 Approval authorities

Name	Position	Signature	Date
J H Bennett	Managing Director		
J C C Dicks	Customer Requirements Director		
W M Foley	Business Development Director		

### 0.3 Associated documents

Reference	Vers	Title	Source
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### 0.4 Abbreviations

**ICL Pathway**

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## 1 Purpose

This document sets out ICL Pathway's proposals that Acceptance Incident 218, currently a medium severity incident, has an agreed resolution plan and that its achievement will allow Acceptance Incident 218 to be Closed.

## 2 Summary

The Acceptance Incident was raised stating that "the majority of offices were experiencing considerable ongoing difficulty in performing the completion of office cash accounts.

Since then, there have been a number of developments in different areas to support the closure plan for AI218. These areas are detailed below and all activities are included in the overall resolution plan and activities are on schedule. A set of success criteria have been drawn up and were passed to ICL Pathway on 26 August 1999.

The closure report reflects the application of the appropriate set of success criteria and cross refers to the relevant measurement, analysis and 'agreement to close' activities to be included in version 0.3 of the Rectification Plan.

## 3 Detailed activities

These have been in the areas described below. Where applicable the dates associated with these activities are contained within the Timetable, Part B of Schedule 2 of the second Supplementary Agreement ("the timetable").

**Application software:** changes have been made, principally in the area of stock unit balancing and cash account to both software and surrounding processes to make the task of office balancing easier to understand and complete. These changes were implemented for LT2 and have proved successful in live use.

**Training:** changes have been made to the managers' training event to spend more time on the areas of error handling, printer use and principally stock unit balancing and cash account. Again, these changes have proven successful in live events.

**Help Desk:** The Horizon Systems Helpdesk (HSH) has now been strengthened by the addition of a cash account domain on Wednesdays and Thursdays. This is to ensure a more advanced level of support for offices that are encountering cash account problems.

Further to the activities above, a workshop took place on 13th August which identified seven specific areas for potential improvement in association with AI218. Commercial consequences of the actions below are agreed in an exchange of letters between Bruce McNiven of POCL and Liam Foley of ICL Pathway(ref B.McNiven letter of 3rd Sept. and Liam Foley's letter of 8th Sept.).

These areas are as follows:

- **Pre-Entry Event**

ICL Pathway has offered to develop and run 370 half day events for a maximum of 4,400 office managers. This is a new event and the dates for the development of this event are covered in detail within the timetable. Specification of the event is defined in doc. IM/PRO/172, version 0.2 - Specification of pre-entry event. This specification has been agreed with POCL through joint working groups.

- **Post Installation Care**

References were made in the success criteria for AI218 to the importance of an agreed resolution plan for AI408. It has been jointly agreed that the Resolution Plan for AI408 is sufficient to cover any residual concerns about post installation care and consequent references to training.

- **Post Installation Competency Strategy**

The joint workshop on 13 August accepted that not all users within the large population will 'absorb' Horizon. This may eventually call for closure of the outlet, replacement of the sub-postmaster or training of additional staff. It has been agreed between POCL and ICL Pathway that other steps taken within this resolution plan should minimise the risk of this and that any residual fallout will be handled by POCL. POCL have agreed to review and strengthen the relevant process. This is reflected in the timetable.

- **Monitoring Of Training Delivery**

ICL Pathway has produced a document IM/PRD/066, version 0.2 - Monitoring of Trainer Quality to detail the processes and procedures that are adopted by Knowledgepool to ensure a high quality of training delivery. This document has been reviewed by POCL and comments made which have been reflected in the latest issue of the document.

- **User Competency**

POCL asserted that the Performance Standard Assessment (PSA) was proving too subjective with potentially too much trainer assistance thus allowing trainees to pass the PSA who would subsequently prove to be unable to handle Horizon in the live environment. ICL Pathway and POCL have worked closely together to review the PSA and to arrive at an agreed test to administer on the training courses. The actions to achieve this are reflected in the timetable.

- **Post Training Consolidation**

It is recognised by POCL and ICL Pathway that insufficient use is being made of training mode in the live environment. The parties have worked together to formulate ideas for promotion of training mode in the live offices. Work on this subject is ongoing and the activities are reflected in the timetable.

- **Agreed Training Course Changes**

The changes raised by Trevor Rollason of POCL as a result of dry runs of the training courses have been implemented and all courses are now signed off.

All of the above areas of activity are reflected in the timetable and all activities scheduled to be completed have been. All other activities are on schedule.

**ACCEPTANCE INCIDENT - 218****CRITICAL SUCCESS FACTORS**

The Following table defines the critical success factors (CSFs) which should be applied to each of the activities to enable the resolution of Acceptance Incident 218. In essence the CSFs are consistent with those defined for the evaluation of the LT2 Horizon system release.

	Measure	Target
	<p>Reduction in demand on support - Measured through a reduction in the number of calls (at the peak time on Wednesday evening and Thursday morning) for advice and guidance to support stock unit balancing, office balancing and production of the cash account received at the HSH and/or at the NBSC.</p> <p>Two time periods defined: peak: Wed 12.00 noon - Thurs 12.00 noon off-peak: the rest of the week</p> <p>ICL Pathway to provide details of calls received at HSH from additional offices, breaking out calls by categories, date, FAD code and associated pinICL number</p>	<p>On average NBSC should not receive more than 1.2 calls per week from outlets when performing their first two balances.</p>
	<p>Reduction in the length of calls from additional offices .</p>	<p>Overall the aim is to achieve a call time of 5 minutes for calls in peak time (e.g. Wednesday evening) and 2.5 minutes for off peak calls to NBSC and HSH.</p>
	<p>The number of offices unable to complete the cash account balance process and produce a cash account balance.</p> <p>As with current practice, cash account balances with explicit reasons for a discrepancy are still considered to be valid.</p>	<p>Zero</p>

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	<p>Time taken to produce a stock unit balance, the office balance and finally produce a cash account.</p> <p>It is assumed that the time taken for balancing excludes any instances where business related discrepancies occur, e.g lost vouchers etc.</p>	<p>In a typical sub-post office the overall process for producing stock unit balances, an office balance and the cash account should be completed within 2.5 hours. In an ECCO office the process should be completed within 4.5hours.</p>
	<p>User generated error reported by TP, in both CLASS and PIVOT.</p>	<p>Pre Horizon baseline level for same outlets.</p>
	<p>Level of success of Users against the Performance Standard Assessment (PSA).</p>	<p>At least 95% success rate.</p>
	<p>All support material must mirror the system e.g. training materials, guides, operating manuals and Training Mode.</p>	<p>There should be no inconsistencies (as reported to the NBSC).</p> <p>[Mitigation - Where inconsistencies are identified there should be an agreed resolution plan.]</p>