ICL Pathway Progress Summary
for Input to Horizon / Pathway Delivery Meeting
13th October 1999

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1 ACCEPTANCE PREPARATION & TESTING

1.1 Overall Summary

The Acceptance Resolution Timetable forms part of the Contract, as a result of the Second Supplemental Agreement, and contains some 300 activities and events that are pacing items for the restart of rollout on 28 January 2000. These are grouped principally under 13 former Acceptance Incident headings. The activities are being reviewed weekly.

There are two further groups of former AIs: those where there is a disagreement as to severity - None (Pathway) and Low (POCL) – and Low/Low items. There are now two or three of the former for arbitration (232, 242 and possibly 379) and 55 of the latter, for which one-line resolution plans are required by 31/10.

The 13 former AIs are reported in Timetable order:

211   This is now resolved and in monitoring until 31/10.

342   This is now resolved, monitoring is complete and formal Closure has been requested.

390   A change to AP counter is due for distribution 30/11. It is in development test.

376   The six-week observation period has started. The work is in three parts: fixes yielding a target stability figure of merit of a maximum 0.6% of Cash Accounts in error (approximately 42); additional reconciliation facilities; and new Operational Business Change (OBC) procedures. Although all fixes are implemented, problems arising from Pathway provided Reference Data were encountered. The definition work for additional reconciliation is on plan and design is in progress. All the OBC procedure work is completed.

378   A "diagnostic" fix is in place to find, and if necessary repair and report, a problem not previously defined. We do not expect to find such a problem, believing it to have been an isolated incident whose true cause was not originally reported and is no longer present.

369   The actions in this group are largely the responsibility of POCL. All formal Pathway actions are complete. POCL Pathway and BA mounted a four-day monitoring exercise to provide more evidence of the root cause of the problem. Six books were impounded and will be independently analysed by PIRA (Printing Industry Research Association) during the week of 11/10.

372   A first report on the distribution of Riposte 5.4.10 and EPOSS roll-up

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release package is being compiled and will be issued to POCL (target 15/10). CP 2116, which will fully automate .dll monitoring, is being worked on.

298   The four-week observation period will start on 21/10. (CCN555 has been raised to make the observation Cash Account Week integral.) All fixes are available and a tracking document to record progress set up. On the cut off date of 1/10 the test sample was established as 782 eligible rolled-out outlets representing 1777 eligible counters. (The required minimum was 750 outlets.) The target is a figure of merit of four units per counter per year, a unit being an authorised reboot or various numbers of workaround. The CAP 28 figure result was around five units on a very satisfactory trend. For CAP29 the result rose to around seven units because of 376-type issues (see above), new offices not being brought up to current software revision levels immediately before first use and some offices not yet equipped with fixes for printer incidents.

218   The Pre-Entry Event actions have progressed well, now paced by CCN 543a approval. Trainer Quality Monitoring actions have been completed such that actual monitoring is in progress. The new PSA Process is with POCL for approval. Post Training Consolidation actions are all Joint or POCL. The Performance Measures on which the eventual closure will be based were due to be finalised 8/10.

390   Physical security of Wigan and Bootle. All actions to date are complete or on target.

314   The technical authors have started work on the manual required, with first delivery by 23/11 and Appendices planned by 28/12.

408   All early actions are complete and the main one to recruit and train the required complement of Help Desk staff is progressing to plan.

412   Ad hoc service reports. The remaining actions are paper-based ones for completion by 28/10 and are on track.

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2. NATIONAL ROLLOUT PREPARATION

2.1 National Roll Out

Revised Rollout Programme
A joint Pathway/POCL workshop to develop and review the implementation of CCN 561 (optimisation of rollout resources/minimise rollout fluctuation) was held on 5th October 99. Agreement was reached on the means of implementation, enforcement and effective date for offering specific training and installation dates to postmasters. Processes, scripts and contract-controlled documentation requiring modification to reflect the agreements were identified and ownership and dates for the implementation of revisions was agreed. A capping method, to manage migrations within or close to the 315 target, was proposed by Pathway and is currently with POCL for comment. Revised detailed rollout plans, showing plans by IP region, are in preparation and will be published by 15th October 1999. A further workshop to progress the actions is planned for 20th October.

POCL Implementation management team have been invited to visit Pathway's rollout team at Kidsgrove and the Celestica and Exel units in Manchester and Byley respectively. This will take place on 14th October with the aim of improving understanding of the rollout processes and factors influencing installation success.

2.2 Infrastructure Programme

The trolley survey solution has been agreed and survey/preparation of trolley outlets will commence in the next few weeks.

2.3 Installation Programme

As of 8th October 99, 978 outlets had been migrated to Horizon and are now operating live. Installations are generally running to schedule and the rate of suspensions and aborts over the 16 week installation process has reduced from the initial rate of 25% to a rate of approximately 16%. This is close to the predicted rate of 15% and it is anticipated it will fall further. Pathway and POCL Implementation management has reviewed the rates of suspension and aborts and have agreed actions to reduce these. The suspension causes of greatest concern are sub-postmaster refusals, ISDN line faults, and reference data counter discrepancies. Sub-postmaster refusals are declining and the enforcement of the single installation date should bring this down further. ISDN line faults are being investigated by Energis and improvements in pre-installation line monitoring are being made. Reference data counter discrepancies are better understood and further action by POCL should reduce this to a satisfactory level.

Concern over fluctuation in rollout volumes across adjacent weeks and days is now reduced since the levels of fluctuation have fallen to an acceptable level.

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This will continue to be monitored and improved further through joint Pathway/POCL workshops.

2.4 *User Implementation and Migration*

<u>Acceptance Incident 218</u>
Rectification plan is proceeding according to schedule. POCL have signed off Monitoring Trainer Quality and the Specification of the Pre-Entry Event. The assigned POCL trainer has been working with the KnowledgePool trainers this week to develop the event. Dry runs of the Pre-entry event are scheduled for 11, 13 and 15 October.

<u>Training Scheduling</u>
Some issues with training scheduling have affected a small number of outlet training dates and installations. This has occurred following recent changes to the Knowledgepool scheduling system. Action has been taken to rectify this issue and changes made over the weekend of 10th October should minimise future occurrences of scheduling issues.

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2.5   Implementation Statistics (To 1st October 1999)

Activity	Previous Report Total	Actual This Period	Cumulative	Comments
INFRASTRUCTURE				
RGM letters issued	17395	0	**17395**	
MIB Events held	382	0	**382**	
MIB attendees	18080	0	**18080**	
Site surveys undertaken	15238	556	**15794**	
Site re-surveys required	5902	262	**6164**	
Site re-surveys undertaken	5400	220	**5620**	
Site modifications done	3754	205	**3959**	
Site preparations done	8096	437	**8533**	
Sites RFI	*	-	**7570**	* Revised as of 11/10/99
User awareness events held	105	16	**121**	
UAE attendees	3284	0	**3284**	
Training events held	570	147	**717**	
INSTALLATION				
ISDN lines installed	1198	430	**1628**	
Sites installed	446	339	**785**	
Sites migrated and Live	446	333	**779**	
Counters Live	1058	714	**1772**	

** NOTE :   Number of offices live as at 8/10/99 is 978

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3 CUSTOMER SERVICE

Infrastructure Services

Strategic Services Unit
Horizon Service Helpdesk

1. Daily SLA reporting has now been established by OSD. A review meeting for failed SLAs is to be held between ICL Pathway and ICL OSD. The initial meeting is to be held 8th October where the calls, which are the subject of failure, will be reviewed and the full terms of reference and frequency of the meeting will be agreed.

1. There is a strong feeling within HSH and from the SouthWest Region that there are insufficient HFSOs to cover the first cash account undertaken by the PM. POCL are requested to confirm they have sufficient cover.

1. The reference data problems have had a major impact on both the Post Office Outlets and HSH. There has been increased call volumes over the past 2-3 weeks since the reference data problems arose. The reference data manager has confirmed that the reasons for failure are understood and plans to mitigate and ultimately correct the problem are in place.

Outlet Change

1. Since the last report POCL have raised the following outlet change requests.

Location	0	Reason for Change 0	Date of Change
Northville, Bristol	0	Outlet Refurbishment0	25/9/99 (complete)
Filton Avenue, Bristol	0	Outlet Refurbishment0	25/10/99
Oldland Common, Bristol	0	Outlet Refurbishment0	31/10/99
Ravenscliffe	0	Outlet Refurbishment0	19/11/99
Cottingley	0	Relocation 0	01/11/99 (TBC)

Implementation

1. The processes established to support roll out activity continue to work well. The importance of promptly dealing with exceptions that would impact on a site going live has been re-emphasised to our suppliers.

Management Support Unit
Management Information

1. As part of AI298, the MSU is continuing to work jointly with POCL to analyse HSH calls relating to systems instability. Call volumes and categorisations have

been agreed for CAP25, 26, 27 and 28. Monitoring will continue as part of the Acceptance rectification plan.

Business / Reconciliation Incident Management

1.   The MSU is awaiting agreement from POCL to the closure of circa 30 PinICLs.

1.   APS continues to reconcile daily.

1.   We are receiving EPOSS incidents directly from POCL TP and are managing to resolve all of them in an acceptable time scale (RED report within 48 hours). The first incident review of CSR is scheduled for 15 October where we will clear up any remaining confusion over the RED reporting process.

1.   The expansion of the live estate has meant that the number of outlets not returning transaction detail to TP, due to ISDN problems or simply that the terminal is powered down, has increased. Under the rectification plan for AI376 an incident must be raised on each office that hasn't polled. At least 75% of these are resolved within the next 24 hours. It would therefore, seem more realistic to only raise as incidents after 48 hours. Richard Brunskill will talk to POCL (with the Requirements team) to try and find a more effective way of dealing with this problem.

3.2 Operations Services

SLA MANAGEMENT

APS

1.   Although there are some issues regarding the method of delivery specified in the Reconciliation report document under discussion between Design and MSU, all issues preventing sign-off are now resolved.

1.   POCL believe that the terms under which AI371was signed off are not being met, with issues around late polling and day 1 reporting. These issues have been addressed through the MSU and the report is now back on track.

1.   No file delivery issues.

CTO

1.   Pathway has received criticisms from the OSG manager regarding the quality of service and personnel supporting the service within Pathway. We have written to the OSG Manager who brought up the issues, expressing Pathway's concern at the way that the matter was raised. The matter has also been discussed with POCL's AP Product Manager. At no time previously has any Service Manager in Pathway been informed of OSG's dissatisfaction via the proper contact and escalation routes. Details of the specific events causing the dissatisfaction have been requested but as yet no response has been received.

1.   Late delivery and problems with Reference Data received from POCL, delayed token testing this week but is now back on track.

AP Client Migration

1.   All presentation material and scripts provided to POCL for Account Managers to present to AP Clients. Original plans for Pathway to be involved in one-to-one

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practice sessions with all Account Managers were changed by POCL. We believe that most Account Managers wish to present to their Clients without Pathway's attendance. Pathway has suggested this could expose them to difficult questions, requiring Pathway's assistance to provide an answer. There was a POCL only team meeting on the 7th October, where the situation was to be assessed. Pathway awaits an update from that meeting in order to decide how to progress.

1. Meeting held on 6th October with POCL to review the general plan and clarify outstanding queries. Eamonn Long attended and was introduced as additional management resource.

TIP

1. A TIP steering meeting held. The principle for OLAs to be completed was progressed. A draft OLA is now being addressed by POCL. NR2 Risk Register closed and new CSR+ Register opened. Discussions about regular Operational Reviews held and arrangements to be agreed.

1. Concerns with Disaster Recovery (DR) have been discussed. A plan to put together a contingency DR solution for immediate requirements has been made, but a longer term DR plan needs to be considered by POCL and a new requirement presented to Pathway. POCL wish to have this completed by April 2000.

LFS

A rejection note has been produced in response to the POCL Service Introduction document. A letter received back from POCL disputes the reasons for the rejection. Because the document essentially would commit POCL and Pathway to activities not yet agreed, the suggestion is that the document becomes a CRD that could be submitted in its current form without risk of signing off unclarified commitments.

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CHANGE MANAGEMENT

<u>Reference Data</u>

1. Recent problems (Friday October 1st to Monday October 4th) with Pathway Reference Data have highlighted a problem within the RDMC with loading new data whilst earlier versions are being verified/released. The immediate difficulties have been addressed and a longer-term solution is in hand. In the interim additional reporting tools are being produced to assist RDT in recognising when such problems may occur.

1. A total of 183 reference data changes were released to the Live estate since the last report. Pathway is now monitoring the number of correction files and the number of migration special changes being submitted by POCL. In the last week there were 14 correction files (12% of the total received) and 21 migration special files (18%).

1. The total number of PinICLs outstanding on POCL with regard to quality of their Reference Data/OBC processes has decreased by 1 to 30. There has again been some movement on the outstanding issues but only on recent problems and we still feel that this could be improved for those calls that have been outstanding for several months.

1. The initial drop of Live Reference Data for SIP16 (improved Cash Account mechanism) has been received and is with B&TC. Pathway understands that there are issues with the supply of updates to this data, because of difficulties in the RDS system in Chesterfield. A meeting was held recently which confirmed arrangements for output from testing to be supplied to POCL as a part of the Reference Data proving exercise. Pathway is still waiting for the remaining changes to the MiMan flag. There has been no response from RDOT in Chesterfield on the possibility of providing test data for year 2000/2001 Cash Account proving. Pathway is therefore assuming that this testing will be performed on Pathway generated data.

1. A meeting has been held with BSM regarding changes to the Interface Agreement for Operational Business Change (Product). As the requested changes are significant a further meeting is being arranged to discuss a way forward.

1. The number of changes to outlet information awaiting authorisation for release from POCL NCAs has increased to 165 despite authorisation from some regions and release of a considerable number of changes. POCL have assured us that the remaining regions are being asked to review this urgently.

1. POCL have assured us that they have taken steps to eliminate the problem of Reference Data files arriving without a change id or empty, which cause the RDMC data loader to abort. Although there have been no further occurrences of this type of file, there has been one occasion within the last two weeks where the loader aborted due to incorrect or missing data within the file.

1. The problem with the incorrect Giro Transcash fee of 97p was corrected when the relevant Reference Data was supplied and verified by POCL and released

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to the Live estate.

1. A problem within the Data Centre during the week commencing 20 September resulted in the non-core Reference Data for offices migrated on 27 September not arriving in the offices until after migration. Steps are being taken to ensure that the lack of this data is recognised earlier.

1. A reconciliation problem has arisen due to a change in the accounting sense on products 196 and 197. The issue arises because the Reference Data supplied from RDS has an immediate start date which is then acted on by iTIP but the nature of the change is such that there is additional Pathway data required followed by verification. It is therefore not possible for Pathway to deliver the change to Live counters within the same timeframe that iTIP is validating the change. RDT are investigating which changes fall into this category and will be reviewing with RDOT the start dates applied to the RDS system.

Software Distribution

The software distribution mechanism continues to operate well with distributions successfully committing to more than 90 % of counters, on the first pass, for most fixes.

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Actions from Delivery Meeting – Wednesday 29th September 1999

ACTION	DESCRIPTION	
4809	To ensure that ICL Pathway's reported figures on the Installation Metrics Report for Site Preps are separated out from those for Sites RFI.	JF 8 Oct
STATUS	*Action completed on this month's report.* *Action closed.*	
4810	To report progress with regard to the problems with the Correspondence server 2 at the next Horizon Delivery Meeting.	SM 8 Oct
STATUS	*Intermittent NT fault on all Correspondence Servers causing 'Blue Screen' fixed by LSASS patch on 6 September Release Note 884a.* *Action Closed.*	
4902	To document the proposal for the figures required in accordance with action 4809 and the incorporation of the appropriate target figures and send to CF for review before the next Delivery Meeting.	JF 6 Oct
STATUS	*Will be sent to C French 11 Oct 99.* *Action closed.*	
4903	To prepare a presentation on the CSR+ plans, drivers and how delays can be minimised at the next New Developments meeting.	MC 6 Oct
STATUS	*Completed.* *Action closed.*	
4904	To discuss the rejection of the Change request for Smart Cards and the impact on the release of CSR+.	MC/CF 30 Sept
STATUS	*A letter was sent to Horizon and the suggested way forward was discussed at the New Developments meeting on 6th October.* *Action closed.*	
4905	To clarify the reasons for the discrepancy between the Pathway and POCL databases with regard to the numbers of counters.	JF 8 Oct
STATUS	*Following the POCL/Pathway Implementation fortnightly review between D Craik and J Flynn, the reasons for reference data counter number discrepancies are now understood by both parties. Discrepancies were occurring because POCL reference data was not always being updated following discrepancies found during site survey. This was thought to have been resolved by the POCL action of interrupting the automatic refresh to the RODB for*	

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	counter quantities and providing necessary updates manually. However POCL had also assumed that counter numbers in the reference data were only a priority up to survey and not after, since previously Pathway had used spreadsheets to record original and corrected counter number changes. This is not the case and therefore failure to update the reference data resulted in automatic refresh of the RODB from the reference data returning the RODB record of counter quantities to the incorrect value. On installation day this creates a discrepancy because the installation is dependant on a configuration file downloaded to the counters, recognising and numbering the total quantity of counters for that outlet. The file is produced automatically by a feed from the RODB. If the RODB value is incorrect following a reference data refresh using uncorrected reference data, then the file will be built for an incorrect quantity of counters. Installation cannot proceed in an outlet where the ACF file records the incorrect quantity of counters and it is not possible to change the ACF file at the time of install. *Action closed*	
4907	To provide a report to AR and JM as to the reasons for the Correspondence Failure and actions taken to resolve the specific issues and take steps to avoid a reoccurrence.	**SM** **8 Oct**
STATUS	*Report and subsequent paper responding to questions from POCL submitted to Dave Hulbert on Wednesday 6 October.* *Action Closed.*	
4908	To provide a breakdown of reference data changes between those that were classed as OBC and those that were reference data.	**SM** **1 Oct**
STATUS	*A weekly snapshot of outstanding PinICLs is sent to Paul Phillips in Chesterfield and to Andy Corbett in Farnborough. Of the 30 outstanding the split is approximately 50-50 between Reference Data and OBC.* *Action Closed.*	
4910	To clarify the release date for SIP16 which had slipped one month to November 1999.	**MC** **1 Oct**
STATUS	*The dates were clarified at the New Developments Meeting on 6th October. The key dates were Data Centre Upgrade 13-14 Nov, Counter Software Distribution 23-26 Nov.* *Action closed.*	
4911	To provide a draft copy of the Release Notice for SIP16, a date by when the release contents would be frozen, and, at a later date, a copy of the final Release Contents.	**MC** **1 Oct**

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STATUS **4913**	*An update will be provided at the next meeting.* *Carried forward.* To agree the Change Requests needed to re-baseline the Resolution Time Table, possibly removing redundant dates from the Contract and identifying the key dates needed.	**MC/AS** **6 Oct**
STATUS **4918**	*CCN 543a has been submitted to Horizon and approval is awaited. CCN 555 will be submitted w/c 11/10/99.* *Action closed.* To arrange for Dave Miller and Richard Christou to pencil a date for meeting in their diaries in the event that the acceptance checkpoint on the 24th November may not achieve positive reports.	**MC/KB** **8 Oct**
STATUS	*Diaries have been made available. Meeting date to be confirmed.* *Action closed.*	