

**ICL Pathway    Delivered Quality Audit Report - IGL Post  
Offices, Stroud**

Ref: QU/REP/0001  
Version: 1.0  
Date: 23/01/97

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**Document Title:** Delivered Quality Audit Report - IGL Post Offices, Stroud

**Document Type:** Report

**Abstract:** On 29th November 1996 the Pathway Quality Manager visited 5 of the 10 IGL Post Offices in the Stroud area to discuss with the sub post masters their experiences of implementation and early operation, to view the quality of the installation and highlight areas for possible future improvement. This report summarises the findings.

**Status:** Issued

**Distribution:** Management Team  
Actionees  
Library

**Author:** Dave Groom

**Comments to:** David Groom

**Comments by:** 24th January 1997

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**0    Document control****0.1    Document history**

Version	Date	Reason
0.1	11/12/96	Draft for comment by M Bennett
0.2	17/12/96	Draft for comment by actionees / reviewers
1.0	17/01/97	Issued

**0.2    Approval authorities**

Name	Position	Signature	Date
Martyn Bennett	Director Quality & Risk Management		

**0.3    Associated documents**

Reference	Vers	Date	Title	Source
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**0.4    Abbreviations**

BT	British Telecom
CMS	Card Management System
DQA	Delivered Quality Audit
IGL	Initial Go Live
LHS	Left Hand Side
PAS	Payment Authorisation Service
PDA	Programme Development Authority
PO(CL)	Post Office (Counters Limited)
Pol	Proof of Identity
PUN	Pick Up Notice
RHS	Right Hand Side
WAN	Wide Area Network
WTL	Workplace Technologies Limited

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## **0.5    Changes in this version**

Updated in the light of comments received. Actions clarified / Actionees modified.

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# 1 Management Summary

## 1.1 Background / History

Initial Go Live (IGL) of the Pathway benefit payment system commenced 23/9/96 at the Leonard Stanley Post Office near Stroud and was extended to nine other offices in the Stroud area from 21/10/96. These installations were subject to a degree of special attention which precluded carrying out a standard Delivered Quality Audit at the time of implementation. Whilst recognising that the implementation at these offices may not be representative of what may be expected during the roll out stage, it was considered important to make a formal attempt to capture issues and learning points from the IGL implementation, utilising Delivered Quality Audit methodology. Five of the IGL offices, including Leonard Stanley, were visited on 29/11/96 for this purpose.

## 1.2 Audit Purpose

To inspect the installations and interview Post Office staff, noting issues and opportunities to improve Pathway products and services arising from the implementation activities of Pathway and our sub-contractors and from early early operating experiences using the Pathway system.

## 1.3 Summary of Findings

Five problems known to the Help Desk had been experienced at several locations:

- PUN Bar Code would not read; keyed in successfully
- Replacement PUN would not activate card
- Historical payments not associated with new card
- Receipt shows Help Desk No as 181 - 1234567
- Postmaster's weekly report prints out wrong week number.

A range of other opportunities to improve the system were noted including:

- To ensure that site surveys identify where an improved electrical earth is required so that installation plans allow sufficient time and resource.
- To ensure that site survey and installation teams are fully aware of the overall sizes of equipment, including wiring.
- Extension of the range of on screen options offered as Proof of Identity to speed transactions and possible extension of the range of acceptable inputs.
- Revision of the Manual and other reference materials to correct errors and omissions.
- Modification to beneficiary documentation to ensure Proof of Identity is

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available for card collection and Casual Agents have available the Beneficiary's card to enable collection of benefit.

## 1.4 Key Customer Comments

The main areas for improvement suggested by Postmasters were:

Batching of card deliveries.

Review of the cost / benefit of Registered / Recorded delivery of cards.

A "parking" clip for the bar code reader.

A holder for receipt forms.

Selection of a printer with smaller footprint.

Duplicate prints of the weekly report.

Clarification of the first payment date for beneficiaries who collect on a 4 week cycle.

Improvement of the Postmaster's weekly report.

## 2 Action Summary

Actionees identified against the Audit findings detailed in section 3.3, are responsible for definition and implementation of an appropriate improvement plan.

Where the Customer Comments in section 3.4 suggest an improvement the Pathway nominee is responsible for determining the feasibility of implementing the suggestion and definition of an action plan, where appropriate.

## 3 Audit Details

### 3.1 General

Audit date: 29th November 1996

Reference: DQA/96/1

Auditor: David Groom, ICL Pathway Quality Manager

Contact: Russell Kemp, PDA Service Management

Sites visited:

A Whitehall, 59 Middle Street

Postmaster

Reg Barton

B Caincross, 20 Westward Road

Brian Palmer

C Ebley, 265 Westward Road  
Hobbs

Keith

D Kings Stanley, High Street

Penelope Knibbs

E Leonard Stanley, 2 Severn Waters

Emma Ryder

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At each location a single set of counter equipment had been installed to support IGL, comprising PC with touch screen, printer, bar code reader and magnetic card reader.

**3.3    Audit Details**

This section summarises aspects of the products or services which appear to be at variance with requirements. Actionees are responsible for planning and implementing appropriate improvement actions.

Actionees:

JD	Janet Dore	DG	Dave Groom
DH	Dave Hollingsworth	LH	Lorraine Holt
SH	Steve Hyde	RMcD	Bob McDermott
SW	Steve Warwick		

Reference	Details Actionee	Category	
A1 Mc D	WTL installation period extended  (10.00 - 21.30) by the need to replace the electrical earth for the office. Is this requirement recognised by the site survey and planned for.	Major	R
A2	The location of equipment envisaged by the site survey resulted in the (mechanical) Scales being located unacceptably high. The printer didn't fit on the under counter shelf constructed for it. A Gas Board terminal has been placed on the shelf instead but this is not acceptable because the PO customer should be able to see the terminal in use. The planned positioning of the processor, taking up half a shelf in a cupboard, proved unworkable because of the size	Minor	R McD (WTL)

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	of the wire bundle behind it. The processor is now fitted across the shelf and takes up 75% of the shelf. It was suggested that the WTL site survey and installation teams should be equipped with boxes of the size of the equipment, including wire bundles. Can the wiring be tidied / integrated.		
A3	Unable to read PUN bar code, details keyed successfully, one event. Problem explained and demonstrated using a copy of the bar codes used for diagnosis.	Critical	DG
DLRCT		Resolved	by
	Postmaster requested to look out for similar events post dating the solution date (14/11).	14/11.	
A4	Replacement PUN would not activate card, one event. Resolved by HelpDesk Estimate of time taken varied (10 - 30mins)	Major	Call Ref: E9611080001 PinICL 913 Rel1 Fix
A5	Replacement card, change of name: new card not linked to outstanding payments. Customer, Mrs S Hawkins, waited c 20 minutes before Help Desk called back to advise issue of benefit against a manual receipt. Previous card impounded, cut in two and returned to Pathway.	Major	Call Ref: E9611290001
A6	Help Desk phone number shown, incorrectly, on receipt as 181-1234567	Major	Call Ref: E9611060003 PinICL 785 Rel 1 Fix
A7	The Postmaster's end of week report of transaction numbers (Thursday to	Major	Call
E9610300005			Ref:

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	Wednesday) shows the PO week number 1 week before actual. (Wk 35 Report to 27/11/96 showed Wk 34.)	PinICL 868 Rel 1 Fix	
A8 / DG	On some days 1 member of staff cannot  work the touch screen, although it works for other staff. The lady concerned has experienced similar difficulties whilst working for a Building Society, which were never resolved.	Minor	SH  (Microtouch)
A9	Only one of the possible proof of identity documents is offered as a screen option (driving license), the alternative being "Other". All the options listed on the PUN should be screen options to save time. It was suggested that an existing benefit book should be added to the list of acceptable Pol. Many customers arrive to collect their cards without valid Pol. If well known to the postmaster it is difficult to turn them away. Practice is to select "Other" and key in "Known" to issue the card. There seems to be no limitation as to what input under "Other" is accepted by the system. Random keystrokes input in error were accepted in one case.	Minor	JD
B1	Bar code reading problems (as in A3).		
B2	Compound problem affecting Mrs Trott (Replacement PUN doesn't activate card, Replacement card not linked to o/s payments Help Desk number on receipt incorrect.) (See A4 / A5 / A6)		
B3	Random event reported: Message SW / DG  "Invalid Transaction" appears	Major	DH
		Minor	



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	spontaneously, screen not touched. Has occurred 2 or 3 times with different users. Touching Tick symbol returns system to normal.		
B4	Equipment size not known initially. Drawer removed to accomodate processor. In practice unit didn't fit so a temporary cover had been placed over the drawer space. Equipment placed on this temporary cover. (See A2)	Minor	RMcD (WTL)
B5	Replacement PUN doesn't activate card. (See A4)		
C1	WAN line enters office on LHS of counters (when behind counter facing the public) and passes to the RHS, the BT box being installed in the parcel store, where it could be prone to damage. The line then returns half way back across the counters to the PC.	Minor	RMcD (WTL)
C2	The training unit processor fitted flush in the allocated space: the live unit protrudes c 3cm beyond the counter because of the wire bundle. False back to space could permit refitting flush (see A2).	Minor	RMcD (WTL)
C3	Mechanical scales had to be repositioned RMcD behind the counter clerks where it is difficult for the public to see the readings.	Minor	(WTL)
C4	Customers arrive to collect cards without valid Pol (see A9).		
C5	There is an error in the encapsulated reference card, in the section on "Impoundment of Card" ref. BES 10.	Minor	LH (Peritas)

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- There should be an instruction  
“Touch Impound Card” in between the  
instructions “Touch Card Management  
ICON” and “Swipe Card to be  
Impounded”.
- C6 There are mistakes in the Manual, which Minor LH  
are only coming to light slowly as the (Peritas)  
unusual situations arise prompting  
reference to the Manual. (Ref. POCL IGL  
Workbook: PATHWAYTEXTIGL091096,  
Date 10/10/96, Version 2.03.)  
Section 5.4 Alternative Payee (Automated)  
Step 4 and Flow Chart:  
Book says “Insert Receipt Slip” and  
system prompt is “Print Receipt”: book  
should say “Print Nil Receipt”. The  
“Insert Receipt” instruction needs to  
be added lower down the page to cover  
normal receipt printing.  
When beneficiary’s card input, screen  
flashes receipt icon but there is no  
instruction in the book to “Insert Receipt”.
- D1 WTL installation period extended into  
a 2nd day because a new earth had to  
be installed (see A1).
- D2 Unable to read PUN bar code (see A3).
- D3 Replacement PUN wouldn’t activate  
card, resolved by Help Desk (see A4).
- D4 Confusion has arisen with Casual Major DH  
Agents not being clear that they must  
bring in the beneficiary’s card as well as  
their own. Concern expressed that this  
will contribute to loss of business to

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	Banks.
D5	End of week report shows week number one before actual (see A7).
E1	Week number on end of week report is wrong (see A7).

**3.4 Customer Comments**

This section summarises the other customer comments, falling broadly into two groups: aspects of products or services considered acceptable, or better, and aspects capable of improvement. Improvement opportunities will be reviewed and actions may be undertaken in the interests of customer care. Such actions are non-mandatory.

## Reviewers:

AC	Anna Campopiano	DC	Dave Cooke
JD	Janet Dore	DG	Dave Groom
LH	Lorraine Holt	SH	Steve Hyde
SM	Steve Muchow	JW	John Wright

Reference	Details	Reviewer
CA1	Implementation activities all took place on time and as expected.	
CA2	BT installation was acceptable ; the box was moved subsequently by WTL.	
CA3	The WTL installation engineer was “ outstandingly helpful.”	
CA4	EXEL arrived on time, did a good job and cleaned up, taking the packaging away with them.	
CA5	Peritas suggested Monday training, which is a busy day. Basic training done after work on Monday with further experience Tuesday / Wednesday before going live on the Thursday. At one point there was confusion between what the trainer	

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	said and the on screen information (details not recalled). Trainees were asked to complete an assessment form and return it to the trainer, who was to provide ongoing support. In the event the feedback was generally positive but the trainees felt that future trainees would feel less inhibited, if they had to make negative comments, if the forms could be returned confidentially to a central location.	LH
CA6	The equipment has all been reliable and looks good.	
CA7	Cards arrive on time, batches are correct condition good.	
CA8	Cards are delivered in small batches (1 - 2) using different services: Registered Mail (£3 + 1st Class Post) Recorded Delivery (£0.60 + 1st Class Post) Sometimes two deliveries are received in a day, each involving a small number of cards. Concern was expressed at two levels: - the expense to Pathway of using Registered Mail, especially since the cards are arriving 3-4 weeks before expiry of the previous Benefit Book. - the expense to the Postmaster of phone confirmation of card receipt: the Post Office makes an allowance for phone calls but it was claimed to be insufficient to cover all PO related costs.	SM
CA9	PUNs appear to be arriving in good time, 3-4 weeks before the preceding benefit counterfoils are exhausted, which may contribute to the number of PUNs being	SM

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	lost as some customers don't want their card until the book has run out.	
CA10	The Postmaster's end of week report would be improved by breaking the list of transactions into blocks of 5, by printing the total number of transactions at the bottom of the list and by printing the Report in duplicate.	JD
CA11	Contact with Sorbus has been satisfactory: 1 contact only when PUN bar code would not read (see A3).	
CA12	CMS / PAS Help Desk is very good. (This from someone trained in Customer Care by a Building Society and by the Girl Guide movement.) Responses are generally quick and accurate.	
CA13	Current keyboard is fine: Lift keyboard is expected to be less convenient, being larger, in the confined counter space. (A clip to hold the current magnetic stripe reader would be preferable.)	SH
CA14	A "parking" clip for the bar code reader would be helpful. (Question asked whether the reader had to flash all the time. I explained the difference of the Welch Allyn unit.)	SH / RMCD
CA15	The printer is considered too big for the confined space: is there any alternative with a vertical orientation, similar to the lottery terminal, to reduce the footprint.	DC / SH
CA16	Receipts tend to be left loose on the counter and prone to falling off. Can	SH

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	a holder be provided. (Consider packaging design.)	
CA17	A card wallet has been provided (by POCL?) with 2 spaces for cards. In the Stroud area 8 cards are in common use at POs, can a holder be made available (for sale to customers?) (gas pay, gas token, electricity pay, electricity token, council tax, council rent, water and benefits).	AC
CA18	A duplicate print of the weekly report would be helpful.	CP 199 - 2 ply tally rolls
CA19	The PUN makes no reference to which benefit the card applies to. One customer attempted to collect a card when an income support book expired. There was a period of confusion before it was established which benefit the customer was seeking. Amended wording of the PUN would be helpful, meanwhile CMS help desk procedures should confirm which benefit the customer is seeking.	JW
CA20	End of day processing includes an apparently redundant step. The steps are:  Touch end of day Prompt Confirm? Touch Tick symbol Stage completes with final prompt Confirm? Touching Tick symbol merely returns user to main menu, but there is no alternative option, so why not return automatically to the menu.	JD

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CA21	Customers who receive benefit on a 4 week cycle have nothing to remind them when the first payment is due. Once a payment has been made, the receipt gives the next due date, but before this they visit the PO each week, being told there is no payment due instead of coming in 4 weeks after the last counterfoil in the preceding book. The suggestion that card activation could trigger a nil receipt with a next payment due date is unlikely to be feasible. Possibly the PUN should remind customers to make note of the date on the last counterfoil and work forward 4 weeks.	DG / AC
CB1	Cards arriving in penny numbers (see CA8).	
CB2	Peritas very good (previous experience with Camelot).	
CB3	No problems with EXEL.	
CB4	Postmaster questioned whether additional terminal(s) would be available in future. I advised yes, 1 per counter position.	
CC1	Different installers brought the training equipment and the live system: concern expressed about continuity. (Not an issue for roll out.)	
CC2	Cards are arriving well before they are required: change of name during the period leaves customer collecting a card in their old name. (Ms Christmas to Mrs Peart.) c 13 cards in use at this office, 30 cards awaiting collection.	SM

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- Loss of PUN and possible change of address are causes for concern if cards arrive well before benefit books expire.
- CC3 Training took place, as arranged, on a Monday which made it difficult as a result of constant interruptions; Monday is a busy day.
- CC4 No space for a signature on a Nil Receipt. (There is no declaration to sign so no requirement for a signature.)
- CC5 Cards delivered in small batches (see CA8).
- CC6 Postmaster's weekly report could be improved (see CA10).
- CD1 A smaller printer would be helpful (see A2, CA15).
- CD2 WTL cleaned up "fairly well"
- CD3 As a new computer-user the training was good and took place on a good day, Friday. The manual is OK as a reminder if you have already done a task in training.
- CD4 Questioned whether an alternative method to record card receipt could be arranged instead of the phone calls. Explained the future approach.
- CD5 Concern at the expense of card distribution (see CA8) especially since books are distributed by normal post.
- CD6 Weekly report could be improved (see CA10).
- CE1 No problems with BT.
- CE2 WTL excellent.
- CE3 EXEL installation went smoothly.
- CE4 Has used the Help Desk and received
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|     | excellent support when dealing with an alternative payee.  |    |
| CE5 | Card swipe unit replaced following read failures: handled well.  |    |
| CE6 | Irritated by having to phone in for small number of cards in each delivery, with possibly 2 deliveries per day, Registered / Recorded, (see CA8). Suggested sending cards out batched weekly or fortnightly since users have books to use up.  |    |
| CE7 | Customers who collect benefit on a 4 week cycle have difficulty keeping track of when 1st card payment is due (see CA21).  |    |
| CE8 | Leonard Stanley do not use the Total Transactions information from the Postmaster's weekly report for reporting purposes. They count the total number of receipts and report this instead. This is at variance with practice at the other offices and will have the effect of understating their count by the number of outstanding payments encashed in a single transaction. Which approach is correct depends whether the information is used for: Pathway reporting or POCL reporting. | DG |
| CE9 | Postmaster wants more customers on the system asap for simplicity.   |    |