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Document Title: Post Office establishment process - release 1c

Document Type: Process Definition

Abstract: Provides the activities that are carried out on installation of the Horizon counter equipment, in IGL and release 1b offices to release 1c, for installation, acceptance ready for hand over to steady state.

Status: Issued

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Comments by: 10 Sept 1997

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0 Document control

0.1 Document history

Version	Date	Reason
0.1	28/5/97	Initial issue for comment Document issued to T&I and Pathway installation team for initial comment.
0.2	3/6/97	Document updated as a result of comments received on initial issue.
0.3	24/7/97	Document updated to reflect comments after first workshop
0.4	13/8/97	Document updated to reflect comments after second workshop
0.5	2/9/97	Document issued for inspection
1.0	14/10/97	Issued document for sign off
1.1	23/10/97	Issued document

0.2 Approval authorities

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0.3 Associated documents

	Reference	Vers	Date	Title	Source
1	IM/STR/0021	0.1	25/4/97	Implementation Strategy release 1c	M Fisk
2	IM/STR/0015	3.1	28/5/97	In office data migration for release 1c	S Downham
3	TD/DES/0019	1.0	23/5/97	Auto Configuration for release 1	E Dempsey
4	IM/PRC/006	2.0	2/6/97	Operation Aspects of the Horizon Field Support Officers for release 1b	M Fisk
5	TSC/GIJ/003	0.3	20/2/97	Strategy for migration to 1c	G Jenkins
6	N/A			IGL Counter infrastructure installation document	P Underwood

0.4 Abbreviations

CM	Configuration Management
D2D	Design to Distribution
HHT	Hand Held Terminal (Used by Exel to record asset details)
HSHD	Horizon System Help Desk
ISDN	Integrated Services Digital Network
MMI	Man Machine Interface
ACF	Auto Configuration File
PC	Personal Computer
PDA	Programme Delivery Authority
PMMC	Post Master Memory card
PO	Post Office
POCL	Post Office Counters Ltd

0.5 Changes in this version

Document updated after comments received from the third technical workshop and comments received from the last issue.

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0.6 Table of content

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1 Introduction

This document describes the activities that occur in Outlets from the installation of the Horizon Counter platform through to the support of the Outlet and equipment in the Steady State environment.

Two groups of activities are encountered;

- Upgrade - where the Horizon counter system has already been installed in an Outlet and is enhanced to the next release.
- Installation - where the Horizon counter equipment is being installed for the first time in an Outlet.

At release 1c the following are encountered.

Environment	Process	Description
IGL	Upgrade	10 Initial Go Live Outlets
Release 1b	Upgrade	Approx. 190 outlets installed at release 1b.

This document deals with the following;

- Preparation of auto configuration files for outlets and Data Centres in readiness for the installation of the Horizon platform.
- Pre installation activities that occur in the Outlet before installation of the Horizon counter equipment.
- De-installation and installation activities for the Horizon counter equipment
- Peripheral tests performed after Horizon counter equipment installation
- Outlet Manager acceptance tests performed after Horizon equipment installation
- Overview of the In office data migration activities
- Hand over of the Horizon counter environment for Steady State support

The completion of these processes means that the post office is **established** and the **equipment is in operational service.**

The document at this release now includes information relating to the Horizon Field Support Officers as described in Ref. 4.

2 Scope

The document provides the following;

- overview of the post office establishment processes

Detailed description of the processes that are carried out to;

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- configure the Horizon counter equipment and Data Centres ready for installation,
- ensure that the equipment is installed in the new Outlets,
- ensure that the equipment is upgraded in existing Outlets,
- ensure that the equipment is operating correctly on installation,
- demonstrate to the Outlet Manager that the equipment is operating,
- handover to steady state

From the acceptance of this document further lower level working instructions are produced.

For the Horizon Field Support Officers these will be the HFSO procedures;

For the Exel installers these will be their work instructions

For the Auto configuration operations this will be the Operational aspects of Auto configuration.

3 Release 1c

This release provides additional facilities to that of release 1b. The release, however still only provides a reduction in the target functionality for release 1. The counter equipment is upgraded in that a new keyboard is introduced to facilitate the use of 4k Smart card technologies and the counter printer is replaced to support an upgraded firmware release[1]. The upgraded software is introduced by swapping out the existing base units. The reduced set of functionality means that the system is used along side the post office current operating procedures.

For IGL offices the release requires that new hardware is installed and that the existing card population is supported at the new release.

The Horizon equipment is delivered to the target outlets using the full implementation infrastructure described in Ref. [1].

[1] The final decision as to whether the counter printer will be swapped out during the upgrade will be made after publication of this document. If counter printers are to be swapped the procedures in this document are to be followed. If the counter printers are not swapped, the existing counter printer in the office will remain and the procedures in this document relating to the swap out of the counter printer are to be ignored.

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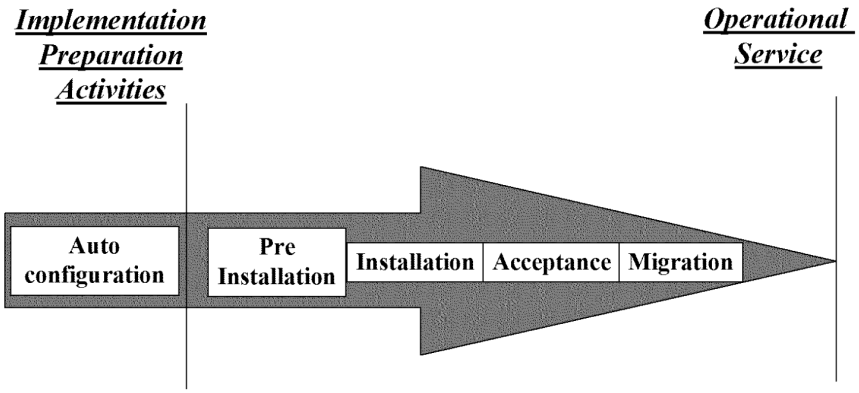
3.1 Overview of the post office establishment processes

The following diagram summarises the groups of activities that are undertaken during the post office establishment process.



POST OFFICE ESTABLISHMENT PROCESS

The Post Office Establishment process describes the activities that take place between the Outlet Implementation Preparation Activities and hand over to the Steady State team as an operational service. Included in this document are the activities associated with auto configuration.

For this release successful completion of the processes described in this document means that the system has been accepted by the post master. Support for the system will then move from the Implementation team to the Customer Service team.

3.2 Role of the Horizon Field Support Officers

The Horizon Field Support Officers support the outlet manager and staff during the post office establishment procedures. The work instructions specific to the Horizon Field Support Officer are described in a lower level series of documents raised as a result of this document.

The number of Horizon Field Support Officers required to support the introduction of release 1c is determined between Pathway and POCL using the existing processes established at release 1b. (Ref. [4]).

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4 Auto configuration

This section provides an overview of the processes involved in generating and applying a configuration to the Horizon counter environment. Configuration parameters are required to allow the end to end communication between the different components of the Horizon infrastructure.

From the acceptance of this document further lower level working instructions are produced.

4.1 Autoconfiguration database

To ensure that all the relevant configuration information is consistent across the Horizon infrastructure, the relevant parameters for each of the systems is modelled on the Autoconfiguration database. Outlet details are generated using information supplied from the rollout database, configuration rules (such the IP addressing scheme) and standard parameter configuration information.

Reports generated from the Autoconfiguration database are passed to a number of sources, external to Pathway and are applied to the relevant systems. For release 1c this will be performed on a working day basis between 30 and 25 working days from installation of target Outlets. This information is obtained from the rollout database (Ref. [1]).

The following table shows the activities involved in generating configurations for the Horizon counter equipment and the corresponding Data Centre and support systems (Ref. [1]).

Activity	Description
Access auto configuration data base.	Access is provided from specific workstations on the rollout help desk.
Select Bulk input	Bulk input provides details of target outlets or individual outlets which may be selected through the MMI. Outlets are ordered relating to the installation date from the rollout database. Initiate bulk input.
Select View and amend	View and amend provides details of target outlets Check for errors and verify against rollout data base schedule
Select Generate	Generate builds the individual ACFs and places them in a target directory version controlled directory. Target directory is based on version number (Ref. [3])

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Move target files to CM Signature server	Initiate MS Explorer Select target drive on CM system Select auto configuration version control directory. Copy files between the two systems (Ref. [3])
Select Generate reports	Generates reports for CFM and Sorbus support teams reporting files ready for collection.

4.1.1 Responsibility

The responsibility for generation of the auto configuration files is the Horizon central implementation team help desk. Outlets and the associated systems are configured based on the target implementation date.

4.1.2 Action on success

Inform CFM, ICL Sorbus and CM of completion of days activities.

4.1.3 Action on failure

Report failure together with appropriate error messages through to the Horizon implementation central team for further action.

4.2 Configuration of the Horizon Counter System

The Horizon system when delivered and installed in an Outlet has sufficient configuration information to allow the Auto configuration software to initialise. This level of software is the same on all systems whether it is a gateway or counter system. It is during the Auto configuration boot process that the difference is detected.

The Auto configuration boot process requires minimal interaction with the Installer and the process is designed to functionally test the Base unit and its associated peripherals during the sequence.

For the Auto configuration process to complete successfully, all the hardware installation procedures for the system must be completed. This includes the loading of paper to the printers etc..

The Autoconfiguration process for an Outlet is dependant on the order in which systems are installed. This is described in section 5.

An overview of process is described in section 4.2.1

4.2.1 Overview of the Auto configuration process

When the installer connects the gateway server to the ISDN connection, powers on the system and scans the bar code during the installation process (see section 5) sufficient information is configured on the base system to enable a connection to a boot server system installed in the Pathway data

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centre to be made. Should the bar code not be available in the outlet then the outlet details can be entered manually to the system by selection of specific keys[2]. Specific information relating to that particular post office gateway server is downloaded to the system. At this point the server automatically applies the configuration information and reloads.

After the system has reloaded, the gateway server then has sufficient information to establish a connection to the Pathway management centre from which the full configuration file (ACF) is downloaded. The server will then apply this configuration information and reload again.

After the system has reloaded for the second time the server is fully personalised with configuration information specific to that post office outlet and counter configuration. The system is then ready for the secure phase of the operation to start. This is the Outlet manager logon. On completion of the Outlet manager logon process, the server will then communicate with the data centre to download specific Riposte information. This process may take up to 15 minutes to complete.

Any additional counter servers in the outlet follow the same process except that the first configuration information is obtained from the gateway server and the loading of Riposte information is also obtained from the gateway server.

Full details of the auto configuration process are found in Ref. 3.

[2] Details to be provided to the Exel support desk

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5 Activities in the Outlets

This section describes the activities carried out in Outlets at release 1c for each of the scenarios described in section 2. In summary the activities are;

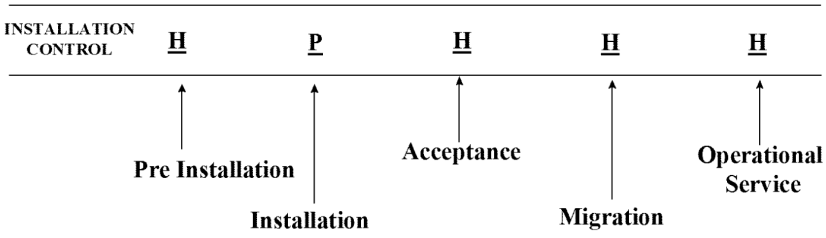
- Pre installation activities
- Installation activities
- Acceptance activities
- Migration activities
- Operational service activities

5.1 Control of the installation programme

Control of the installation activities is shared between the Horizon Field Support Officer and the Exel installer. The following sections will define the responsibility in each case. This is summarised in the following diagram.

H **Horizon Field Support Officer**

P **Exel Installer**



Control of Installation Processes

The purpose of applying control to the post office establishment processes is to ensure that all parties involved in the associated activities are led by a nominated body as indicated in the document.

When installation control is with the Horizon Field Support Officer, this is made clear and agreed with all parties in the outlet.

When installation control is with Exel installer, this is made clear and agreed with all parties in the outlet.

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5.2 IGL Outlets

The activities performed at IGL outlets apply to 10 specific outlets in the South Wales and South West region. The upgrade activities at these outlets occur over a specified migration weekend. The activities are scheduled to start at the close of business on Friday evening and complete by Monday morning.

The migration weekend activities require co-ordination with data centre migration activities. To ensure that management of the post office establishment procedures in the outlets is controlled a local management centre will be established from which specific timing of the activities will be controlled by ICL Pathway. This local management centre will be the primary contact for the data centre migration team who are controlling the whole weekend activities.

The activities described in this section will be carried out firstly on one of the outlets followed by the rest of the 9 outlets. Activities in the outlet are controlled through the local management centre.

5.2.1 Spare Key Policy

Each of the existing base units is chained to the outlet infrastructure. To remove the unit requires that the unit is unlocked using a key held by the outlet manager. Spare keys are held by ICL Pathway. For the migration weekend spare keys will be held at the local management centre. Should no key be available then bolt cutters will be used.

The IGL outlets have been checked by ICL pathway to ensure that site is ready for installation.

5.2.2 Friday activities

The Friday activities are described below.

Activity	Description	Where information is obtained from
Introduction to outlet manager	• Establish communication with the outlet manager. • Show post office pass • HFSO should not forget to include the office staff in their introductions	• Outlet details from rollout database schedules • Security procedures
Describe the activities	• Overview of the activities of end of week reports and power off of the equipment	• Work instructions
Outlet manager performs end of	• End of day and end of week activities produce	•

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day and end of week activities	• reports for outlet manager cash account • HFSO contact data centre migration help line to ensure end of day activities have been completed • Ensure keys are available to unlock equipment If no key is available then invoke spare key policy through local management centre	
Log off system	• Log off system	• Work instructions
HFSO powers off system	• Disconnect from ISDN point • Power off system by log off system and power off by power switch on base unit. Switch off peripherals	• Work instructions

The existing system will remain in the outlet until installation of the new Horizon equipment occurs which will take place at an arranged time the following day on completion of the data centre migration activities (Ref. [5]).

Should any further benefit payments be required at these outlets on the following day before installation, then these are issued through the manual fall back process (Ref. [2])

The following activities occur on the day of installation of the Horizon counter equipment.

5.2.2.1 Responsibility

The responsibility for the Friday activities is the Horizon Field Support Officer, who will work with the post master

5.2.2.2 Action on success

The data centre upgrade activities described in ref. 5 are started.

5.2.2.3 Action on failure

Failures are reported back the local management centre with the following details;

- Outlet name and address and FAD code.
- Nature of problem encountered.

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- Name of Horizon Field Support Officer.

5.2.3 Pre installation activities

For each outlet the Horizon Field Support Officer requires;

- Outlet address (Obtained from rollout schedules)
- Work instructions (produced as a result of this document)

This is supplied in advance of the installation day through the HFSO manager after liaison with Pathway Transition Executive.

Activity	Description	Where information is obtained from
Introduction to outlet manager	• Establish communication with the outlet manager. • Show post office pass • HFSO's should not forget to include the office staff in their introductions	• Outlet details from rollout database schedules • Security procedures
Describe the activities	• Overview of the activities of de-installation, installation, acceptance and migration	Work instructions
Clear working areas	• Counter positions, • Under the counter positions • Entrances are cleared	Work instructions
Check electrical connections installed for Horizon	• Nothing connected	Work instructions
Identify area for packing / unpacking of equipment	• Assist the outlet manager in identifying areas within the outlet where the Exel installer can pack the existing IGL equipment and unpack the Horizon equipment as it arrives.	Work instructions
Security procedures	• Remind the outlet manager of their security requirements.	Security procedures
Ensure Horizon Counter system is	• Ensure ISDN cable is disconnected	Work instructions

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disconnected from ISDN point	• Check IGL equipment is powered off	

5.2.3.1 Responsibility

The responsibility for the Pre installation activities is the Horizon Field Support Officer, who will work with the post master.

5.2.3.2 Action on success

The installation activities described in section 5.2.3 are started.

5.2.3.3 Action on failure

Failures are reported back the Horizon System Help Desk with the following details;

- Outlet name and address and FAD code.
- Nature of problem encountered.
- Name of Horizon Field Support Officer.

The problem is reported back to the Horizon rollout help desk for the appropriate action.

5.2.4 Installation procedures

These activities are carried out by an Exel installer.

For each outlet the Exel installer requires;

- Delivery details
- Equipment delivery form
- Acceptance sheet
- Installation instructions
- Post Master Memory Card which will be stored in the gateway overshipper
- Bar Code sheet for that outlet
- Site Survey CAD drawing and narrative
- List of equipment to be removed from the outlet
- Hand Held Terminal for collection of asset data
- Appropriate overshippers containing the Horizon equipment
- Spare overshipper to pack the existing equipment into.

Activity	Description	Where information is obtained from
Introduction to Outlet Manager	• Installers arrive at the Outlet	• Outlet details from rollout database

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and HFSO	• Installer introduces himself to the Outlet Manager • Presentation of Pathway post office pass • Installers should not forget to include the office staff in their introductions • Introduction to Horizon Field Support Officer	• Security procedures • Ref. 3
Identifies ISDN point.	• The ISDN termination is located near to where the existing IGL equipment is installed • Confirmation of Outlet using the outlet identifier label attached at the ISDN point	• Site Survey CAD Drawing.
Confirm Site Survey details	• Installer confirms site survey details with Outlet Manager • Checks to ensure that any agreements with Outlet Manager have been met	• Site Survey CAD Drawing
Describe activities to Outlet Manager	• Installer describes a summary of the activities that will take place	• Site Survey CAD Drawing • Work instructions

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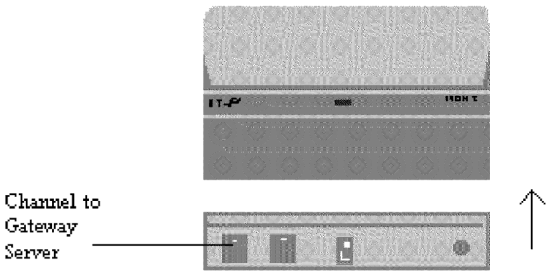
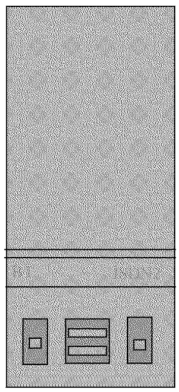
The following diagram shows an ISDN termination. The ISDN cable is pre installed by WTL as part of the Site Preparation activities. To avoid damage in the time between the Site Preparation activities and the Installation activities, the cable may have been left with the Outlet Manager for safe keeping. Where the cable has already been installed in trunking the communications cable may not be connected to the left hand channel.

For release 1c the only cable in use will be the ISDN cable which is coloured BLUE.



ISDN 6 Termination view from underneath



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Activity	Description	Where information is obtained from
Identifies area where overshippers can be used to pack and unpack the equipment is agreed with HFSO and outlet manager	• The area is required to pack overshipper with existing IGL equipment • The area is also used to unpack new overshipper with Horizon equipment	• Site Survey • "Reccy" of site
Obtain Outlet Manager permission to start	• Outlet Managers permission to start the installation activities is required	• Outlet Manager
Collect all consumables	• All existing slip printer labels • Remove sticky Velcro bar code label from desk top	• Outlet Manager
Scan Post Office Identifier code in outlet with HHT	• Bar code for outlet located next to ISDN point • Check identifier marked as Post office code on label matches outlet details on delivery note and installation bar codes	• Work instructions
Report in through Exel Help desk	• Connect ISDN phone to left hand channel as shown in diagram above via ISDN cable block connector	• ISDN phone made available ISDN cable if connected will have to be disconnected from left hand channel
Disconnect ISDN phone	• Allows for BLUE ISDN cable to be connected again.	• Work instructions
Remove existing IGL equipment	• Ensure equipment is powered off • Disconnect interconnecting cables and ISDN cable • Unchain Base Unit from counter	• Work instructions • Key from post master

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	• Pack existing equipment into spare overshipper with correct label representing office • Place overshipper in vehicle	• Include ISDN cable

5.2.4.1 Installation of Gateway server

The gateway server is always the first system to be installed. This section describes the activities.

The Gateway server is located in a position determined during the Site Survey process and is determined from the Site Survey CAD Drawing where the ISDN point is installed.

All interconnecting cables are cable tied using the cable wrap such that the counter position is left in a tidy fashion.

Activity	Description	Where information is obtained from
Unpack gateway Overshipper	• Confirm correct Gateway type	• Overshipper label • COUNTER POSITION showing xxxxxx00101
Install gateway server	• Unpack equipment and install in identified location • Pass 2 PMMC to Office manager. (HFSO to stress importance of cards to office manager) • Connect peripherals • Connect Gateway PC to Communication port • Connect Gateway PC to LAN (if there)	• Site Survey & Implementation Strategy • Work instruction • Using BLUE cable • Using GREY cable
Label Gateway	• Attach Bar-code 01 to Gateway PC after detaching from bar-code label sheet	• xxxxxx00101
Power on Gateway server	• Gateway PC loads to auto configuration screen	
Ensure date displayed is current date	• Date is presented on screen as system boots	

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The following table shows the boot sequence for gateway servers

Boot Sequence	Exel installer activities
• Power on Gateway server	• Ensure all peripherals are correctly attached to Base unit • Power is applied all Peripherals. • Power is applied to the Base unit
• Prompt to scan Post Office Identifier counter identifier	• Scan using the Horizon Bar-code reader the post office code identifier • Press <Enter> on keyboard to acknowledge read • At this point the initial configuration items are loaded from the boot server (see section 4)
• Message is displayed indicating Outlet and node details	• Use Touch screen to acknowledge prompt. • If Touch screen requires calibration invoke screen calibration procedures Follow work instructions for calibration.
• Message is displayed indicating Outlet and node details	• Match details on screen against those shown on the outlet bar code label • Press < Enter > to acknowledge prompt if correct • Press <Esc> if details are incorrect and invoke Recovery Procedures[3] based on the error number provided.
• System Reboots	
• Message displayed to indicate phase 2 of configuration.	At this point the full system configuration file is downloaded from the Pathway Management Centre (Ref. [4])
• System Reboots	At this point the configuration and

[3] Section 5.4.2.5

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	personalisation of the system is complete.

On completion of the configuration activities the gateway server will prompt for the PMMC. This phase of the boot sequence is known as the secure phase. The following activities are carried out at the gateway server.

Activity	Description	Where information is obtained from
Initialise PMMC	• Insert card at gateway • Perform secure procedures	• Ref. 2
Counter synchronisation	• Gateway server will synchronise with the data centre Correspondance server. THIS PROCESS WILL TAKE APPROX. 15 Minutes to complete.	

On completion of the Security phase procedures the following activities are carried out.

Activity	Description	Where information is obtained from
Check connected peripherals	• Perform installation checks on attached peripherals	• Section 6
Collect asset Details	• Scan the Bar-code attached to the Overshipper with HHT	• Work instructions
Tidy all interconnecting cables	• Tie cables in a tidy fashion using the cable ties, cable wrap	

5.2.4.2 Installation of counter System

Any additional counter systems are installed after the gateway server. There is no set order for the installation. Each counter PC is labelled with a Bar Code that represents the counter position. However all activities associated with the gateway must be complete before starting with these procedures.

All interconnecting cables are cable tied such that the counter position is left in a tidy fashion.

Activity	Description	Where information is obtained from

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Unpack counter Overshipper	• Confirm correct counter system	• Address and computer name **xxxxxx0010y (where y is counter position number)**
Install counter server	• Unpack equipment and install in identified location • Connect peripherals • Connect to LAN	• Site Survey & Implementation Strategy • Installation guide • where applicable
Label counter	• *Attach Bar-code* xx to counter PC after detaching from bar-code label sheet	• xxxxxx0010y where y is counter position number

The following table shows the boot sequence for counter servers

Boot Sequence	Exel installer activities
• Power on counter system	• Ensure all peripherals are correctly attached to Base unit • Power is applied to all Peripherals. • Power is applied to the Base unit
• Prompt to scan Post Office Identifier counter identifier	• Scan, using the Horizon Bar-code reader, the post office code identifier attached to the base unit • Press <Enter> on keyboard to acknowledge read • At this point the initial configuration items are loaded from the boot server (see section 4)
• Message is displayed indicating Outlet and node details	• Use Touch screen to acknowledge prompt. • If Touch screen requires calibration invoke screen calibration procedures Follow work instructions for calibration.
• Message is displayed indicating Outlet and node details	• Check against details shown on outlet label • Press < Enter > to acknowledge

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	• prompt if correct • Press <Esc> if details are incorrect and invoke Recovery Procedures[4] based on the error number provided.
• System Reboots	
• Message displayed to indicate phase 2 of configuration.	At this point the full system configuration file is downloaded from the Pathway Management Centre (Ref. [4])
• System Reboots	At this point the configuration and personalisation of the system is complete.

On completion of the configuration activities the counter server will prompt for the PMMC. This phase of the boot sequence is known as the secure phase. The following activities are carried out at the counter server.

Activity	Description	Where information is obtained from
Insert PMMC initialised at the gateway server	• Insert card at counter system • Perform secure procedures	• Ref. 2
Counter synchronisation	• The counter will synchronise with the gateway server.	

On completion of the Security phase procedures the following activities are carried out.

Activity	Description	Where information is obtained from
Check connected peripherals	• Perform installation checks on attached peripherals	• Section 6
Collect asset Details	• Scan the Bar-code attached Overshipper with HHT	• Work instructions
Tidy all interconnecting cables	• Tie cables in a tidy fashion using the cable ties, cable wrap	
Remove overshipper	• There is only one existing IGL system in	• Work instructions

[4] Section 5.4.2.5

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packaging	• an outlet to be removed	

This set of processes are repeated for each counter position.

5.2.4.3 Responsibility

The responsibility for the installation activities is the Exel installer, who will work with the outlet manager and the Horizon Field Support Officer.

The responsibility for operating the security phase is the outlet manager with assistance from the Horizon Field Support Officer.

5.2.4.4 Action on success

When the equipment has been installed correctly at all the counter positions in the outlet the Horizon Field Support Officer performs Acceptance tests on each counter position as described in section 7

5.2.4.5 Action on failure

In the event of any problems/failures are encountered during the installation phase the Exel installer will use the ISDN telephone to contact the Exel help desk with details of the problem encountered for advise.

The Exel help desk will advise the installer on the next course of action which is based on the following;

- Replacement of a failing item or piece of equipment using the spares carried in the delivery van
- Take advise as to whether the installation needs to be abandoned. This will result in the initiation of the recovery procedures described in section 5.3.

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5.3 Recovery procedures

The existing equipment will initially de installed and stored in a labelled overshipper in the delivery vehicle. Should any part of the upgrade fail or instructions be passed to regress then all of the new equipment will be swapped out and replaced with the existing equipment (ref. [6]).

The existing equipment will be then transported after a successful implementation to the local management centre for safe keeping. Should any part of the upgrade fail or instructions be passed to regress to the existing system, then all of the new equipment is swapped out and replaced with the existing equipment. The existing equipment is transported back to the outlet from the local management centre unpacked and installed using the IGL counter infrastructure installation document (ref. [6]). No data migration back to the old system is required at the outlet. This is achieved at the data centre.(Ref. [2]).

After the migration weekend activities the existing equipment will be transported back to a safe storage site. If regression is required at the outlet after the upgrade weekend activities, then the existing equipment will be transported back to the outlet from the safe storage site, unpacked and installed using the IGL counter infrastructure installation document (ref. [6]). No data migration back to the old system is required at the outlet. This is achieved at the data centre.(Ref. [2]).

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5.4 Release 1b to 1c outlets

The activities performed at outlets which have currently been installed with the Horizon counter system at release 1b are upgraded at this release. The activities include a swap out of the base unit, keyboard and counter printer at each position. The upgrade activities at these outlets will occur over a specific working day period during the operation day. Some disruption to the existing service may be experienced whilst the upgrade takes place.

The replaced items will be removed from the outlet using the packaging in which the new equipment was delivered.

Should any books require scanning during the installation period, then the outlet manager will use the existing manual facilities (Ref. [2]).

The following activities occur on the day of installation of the Horizon counter equipment.

5.4.1 Pre installation activities

For each outlet the Horizon Field Support Officer requires;

- Outlet address (Obtained from rollout schedules)
- Work instructions (produced as a result of this document)

Activity	Description	Where information is obtained from
Introduction to outlet manager	• Establish communication with the outlet manager. • Show post office pass • Do not forget to include the office staff in their introductions	• Outlet details from rollout database schedules • Security procedures
Describe the activities	• Overview of the activities of installation, acceptance and migration	Work instructions
Clear working areas	• Counter positions, • Under the counter positions • Entrances are cleared	Work instructions
Check each base unit is labelled with a post office code identifier	• If there are no post office code identifier ask outlet manager for the spare sheet • If there are no post office code identifiers in	Work instructions

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	• outlet, report via HSHD and invoke manual entry of bar codes (see section 5.4.1.3)	
Identify area for unpacking of equipment	• Assist the outlet manager in identifying areas within the outlet where the Exel installer can unpack the equipment as it arrives.	Work instructions
Security procedures	• Remind the outlet manager of their security requirements.	Security procedures

5.4.1.1 Responsibility

The responsibility for the Pre installation activities is the Horizon Field Support Officer, who will work with the post master.

5.4.1.2 Action on success

The installation activities are started in the Outlet as described in section 5.4.2

5.4.1.3 Action on failure

Failures are reported back to the Horizon System Help Desk with the following details;

- Outlet name and address and FAD code.
- Nature of problem encountered.
- Name of Horizon Field Support Officer.

The problem is reported back to the Horizon System Help Desk for the appropriate action.

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5.4.2 Installation procedures

These activities are carried out by an Exel installer. All cables, with the exception of the keyboard cable, attached to the base unit, peripherals and ISDN cable will remain. The judgement as to whether cables are replaced at the time of the swap out of equipment will be at the judgement of the Exel installer.

For each outlet the Exel installer requires;

- Delivery details
- Equipment delivery form
- Acceptance sheet
- Installation instructions
- Post Master Memory Cards which are stored in the gateway base unit packaging
- List of equipment to be removed from the outlet
- Hand Held Terminal to collect asset data
- Appropriate containers containing the Horizon equipment to be replaced.
- Bar code sheet with dummy payment book details
- Base unit stand as appropriate

Activity	Description	Where information is obtained from
Introduction to Outlet Manager and HFSO	• Installers arrive at the Outlet • Installer introduces himself to the Outlet Manager • Confirmation of Outlet using the outlet identifier label attached at the ISDN point • Presentation of Pathway post office pass • Introduction to Horizon Field Support Officer • Installers should not forget to include the office staff in their introductions	• Outlet details from rollout database • Security procedures • Ref. 3
Describe activities to Outlet Manager	• Installer describes a summary of the activities that will take	• Work instructions

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	• place	

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Identifies an unpacking area which is agreed with HFSO and outlet manager	• The area is required to unpack to container boxes with the replacement equipment	• Site Survey • "Reccy" of site
Obtain Outlet Manager permission to start	• Outlet Managers permission to start the installation activities is required	• Outlet Manager
Identifies ISDN point	• The ISDN termination is located near to the gateway server	
Scan Post office code identifier attached in the outlet using HHT	• Located near at the ISDN point	• Work instructions
Report in through Exel Help desk	• Connect ISDN phone to right hand channel as shown in diagram above (the existing equipment is attached at the left hand channel)	
Disconnect ISDN phone		• Work instructions

Before the existing systems can be removed existing data has to be passed through the network to the data centre (Ref. [2]). This is performed by the HFSO as follows with the activities being carried out in the order shown below;

- Counter positions
- Gateway server

Activity	Description	Where information is obtained from
Scan test bar code	• Test bar code is issued to all installers. • Cancel transaction. This ensures that all data on systems has been transferred to the Horizon data centre. • Log all users from the	

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	• system	

Control of the installation activities is then passed back to the Exel installer to carry out the following activities.

Activity	Description	Where information is obtained from
Remove base unit keyboard and printer	• Power off equipment • Disconnect interconnecting cables • Remove Base Unit and keyboard and counter printer • Remove Bar code label on Base unit ready. This label will be applied to new Base unit	• Work instructions
Repeat activities for all counter positions		
Repeat activities for gateway server		

When all the equipment has been disconnected then the new equipment can be installed.

5.4.2.1 Installation of Gateway server

The gateway base unit and peripherals are always the first system to be installed. This section describes the activities.

The Gateway base unit is the first system to be replaced, together with the replacement printer and keyboard.

All interconnecting cables are cable tied such that the counter position is left in a tidy fashion.

Activity	Description	Where information is obtained from
Unpack gateway base unit	• Confirm correct Gateway server • Pass PMMC to outlet manager (HFSO to stress importance of cards to office manager)	• Overshipper label • COUNTER POSITION showing xxxxxx00101

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Check base unit and monitor stand	• Add base unit stand if required • Replace monitor stand if required	• Work instructions

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Install gateway server and replacement items	• Unpack gateway server and install in identified location • Unpack and install keyboard • Unpack and install counter printer • Connect peripherals • Connect Gateway PC to Communication port • Connect Gateway PC to LAN (if there)	• Site Survey & Implementation Strategy • Work instruction • Using BLUE cable • Using GREY cable
Label Gateway	• Attach Bar-code 01 to Gateway PC removed from existing gateway base unit	• xxxxxx00101

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The following table shows the boot sequence for gateway servers

Boot Sequence	Exel installer activities
• Power on Gateway server	• Ensure all peripherals are correctly attached to Base unit • Power is applied all Peripherals. • Power is applied to the Base unit
• Prompt to scan Post Office Identifier counter identifier	• Scan using the Horizon Bar-code reader the post office code identifier • Press <Enter> on keyboard to acknowledge read • At this point the initial configuration items are loaded from the boot server (see section 4)
• Message is displayed indicating Outlet and node details	• Use Touch screen to acknowledge prompt. • If Touch screen requires calibration invoke screen calibration procedures Follow work instructions for calibration.
• Message is displayed indicating Outlet and node details	• Press < Enter > to acknowledge prompt if correct • Press <Esc> if details are incorrect and invoke Recovery Procedures[5] based on the error number provided.
• System Reboots	
• Message displayed to indicate phase 2 of configuration.	At this point the full configuration file is downloaded from the Pathway Management Centre (Ref. [4])
• System Reboots	At this point the configuration and personalisation of the system is complete.

On completion of the configuration activities the gateway server will prompt

[5] Section 5.4.2.5

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for the PMMC. This phase of the boot sequence is known as the secure phase. The following activities are carried out at the gateway server.

Activity	Description	Where information is obtained from
Initialise PMMC	• Insert PMMC at gateway • Perform secure procedures	• Ref. 2
Counter synchronisation	• Gateway server will synchronise with the data centre Correspondance server. THIS PROCESS TAKES APPROX. 15 Minutes.	

On completion of the Security phase procedures the following activities are carried out.

Activity	Description	Where information is obtained from
Check connected peripherals	• Perform installation checks on attached peripherals	• Section 6
Collect asset Details	• Scan the Bar-code on the existing equipment and the new equipment	• Work instructions
Tidy all interconnecting cables	• Tie cables in a tidy fashion using the cable ties, cable wrap	• Work instructions
Remove equipment in packaging	• Existing packaging is used to remove equipment from site • Label packaging to indicate old equipment. Mark packaging with serial numbers of Ithaca printer and keyboard.	• Work instructions

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5.4.2.2 Installation of counter System

Any additional counter systems are installed after the gateway server. There is no set order for the installation. Each counter PC is labelled with a Bar Code that represents the counter position. However all activities associated with the gateway must be complete before starting with these procedures.

All interconnecting cables are cable tied such that the counter position is left in a tidy fashion.

Activity	Description	Where information is obtained from
Unpack counter Overshipper	• Confirm correct counter system	• Address and computer name **xxxxxx0010y (where y is counter position number)**
Install counter server	• Unpack equipment and install in identified location • Unpack and install keyboard • Unpack and install counter printer • Connect peripherals • Connect to LAN	• Site Survey & Implementation Strategy • Installation guide • where applicable
Label counter	• *Attach Bar-code* xx to counter PC from the base PC which has been removed from that position	• xxxxxx0010y where y is counter position number
Power on Counter	• Counter PC loads to auto configuration screen	

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The following table shows the boot sequence for counter servers

Boot Sequence	Exel installer activities
• Power on counter system	• Ensure all peripherals are correctly attached to Base unit • Power is applied all Peripherals. • Power is applied to the Base unit
• Prompt to scan Post Office Identifier counter identifier	• Scan using the Horizon Bar-code reader the post office code identifier • Press <Enter> on keyboard to acknowledge read
• Message is displayed indicating Outlet and node details	• Use Touch screen to acknowledge prompt. • If Touch screen requires calibration invoke screen calibration procedures Follow work instructions for calibration. • At this point the initial configuration items are loaded from the boot server (see section 4)
• Message is displayed indicating Outlet and node details	• Press < Enter > to acknowledge prompt if correct • Press <Esc> if details are incorrect and invoke Recovery Procedures[6] based on the error number provided.
• System Reboots	
• Message displayed to indicate phase 2 of configuration.	At this point the full configuration file is downloaded from the Pathway Management Centre
• System Reboots	At this point the configuration and personalisation of the system is complete.

On completion of the configuration activities the counter server will prompt for

[6] Section 5.4.2.5

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the PMMC. This phase of the boot sequence is known as the secure phase. The following activities are carried out at the counter server.

Insert PMMC initialised at the gateway server	• Insert PMMC at counter system • Perform secure procedures	• Ref. 2
Counter synchronisation	• Counter server will synchronise with the gateway server	

On completion of the Security phase procedures the following activities are carried out.

Activity	Description	Where information is obtained from
Check connected peripherals	• Perform installation checks on attached peripherals	• Section 6
Collect asset Details	• Scan the Bar-code on the existing equipment and the new equipment	• Work instructions
Tidy all interconnecting cables	• Tie cables in a tidy fashion using the cable ties, cable wrap	
Remove equipment in packaging	• Existing packaging is used to remove equipment from site • Label packaging to indicate old equipment	• Work instructions

This set of processes are repeated for each counter position.

5.4.2.3 Responsibility

The responsibility for the installation activities is the Exel installer, who will work with the outlet manager and the Horizon Field Support Officer

5.4.2.4 Action on success

When the equipment has been installed correctly at all the counter positions in the outlet the Horizon Field Support Officer performs Acceptance tests on each counter position as described in section 7

5.4.2.5 Action on failure

Should any problems be encountered during the installation phase the Exel installer will use the ISDN telephone to contact the Exel help desk with details of the problem encountered for advise.

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The Exel help desk will advise the installer on the next course of action which is based on the following;

- Replacement of a failing item or piece of equipment using the spares carried in the delivery van
- Take advise as to whether the installation needs to be abandoned. This will result in the initiation of the appropriate back up teams who will be directed to site to manage the specific problem under the control of the ICL Pathway central support team.

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6 Peripheral Tests

This section provides the procedures which are used during installation for functionally testing the peripherals. These tests assume that all the peripherals have been correctly installed. The Touch screen monitor, Bar code reader and keyboard (including the smart card facility) is tested during the installation, auto configuration and security phase activities. The functionality of the base unit is tested during the installation, configuration and security phases, however additional information is also provided in this section which is used by the Exel engineers.

The equipment that requires further testing is the counter printer and office printer. These two items are covered in the following sections.

6.1 Counter printer

The counter printer is functionally tested using the self print test. This is achieved by powering on the printer with the “Resume” key held. This test is performed using the procedures established at release 1b. After the test has been successfully performed the printer is powered off and on again.

6.2 Office Printer

Two types of printer exist. These tests only check the operation of the printer as a unit. The integrated test for the printer will not be available at this release. Testing of the unit for future releases in not covered in this document.

6.2.1 Inkjet Printer

- Load paper in the unit.
- Power on the printer. The power switch is located on the top of the printer to the right of the paper feed tray as viewed from the front.

If the power indicator light does not display then check power cables.

- Test Print - To initiate a test print power off the printer and press and hold the LOAD/EJECT button while turning the printer back on. When the printer starts printing, let go of the LOAD/EJECT button. This should output a printed sheet with a title “EPSON Stylus 200” followed by some technical information.

6.2.2 Laser printer

- Load paper in the unit.
- Power on the printer. The power switch is located at the side of the mains socket at the rear of the printer.

If the power indicator light does not display then check power cables.

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- Test Print - To initiate a test print press and release the PRINT/RESET button This should output a printed sheet with a title “Printer (PCL) Status” followed by some technical information.

6.3 Base Unit

The Base Unit also supports the hard disk with Horizon software installed. Power on unit allows tests on the keyboard and Bar Code reader to be carried out.

- Power on PC. A Green indicator light * will be lit on the front on the unit.
- Three lights will be initially displayed on the keyboard.

  * * *

  √ * *

  This tests the keyboard physical connections. If the test is successful then only the green √ light will remain lit.
- System will be seen to load. The first screen will show tests of the hardware platform. The second screen will show a Blue screen with the following at the top;
- **Ensure no errors** reported during the load sequence.
- As the system loads a further green light on the Unit ☐ will be seen to flash on and off and the system loads to the auto configuration screen

6.4 Equipment delivery form

At this point, when all the equipment has been installed and checked at each position the Exel installer will ask the Outlet Manager to sign the equipment delivery form. This form registers that all the equipment and PMMC have been delivered and installed to the outlet.

This is provided by the Exel installer.

The completion form is returned to ICL Pathway for storage in the completion packs

6.5 Action on success

When all the equipment has been successfully tested, control of the installation programme is now passed to the Horizon Field Support Officer who will perform the Acceptance tests described in section 7, with the Outlet Manager to demonstrate that the equipment has been installed and is operating as expected.

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6.6 Action on failure

Should any problems be encountered during the peripheral testing phase the Exel installer will use the ISDN telephone to contact the Exel help desk with details of the problem encountered for advise.

The ISDN phone can be plugged in to the right hand ISDN channel without impact on the Horizon counter equipment.

The Exel help desk will advise the installer on the next course of action which is based on the following;

- Replacement of a failing item or piece of equipment using the spares carried in the delivery van

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7 Acceptance tests

The acceptance tests apply in all the scenarios described in section 1.

The Horizon equipment after installation has to be demonstrated to the Outlet Manager at release 1c to check the functionality of the system. The tests are controlled by the Horizon Field Support Officer who will carry out the tests in conjunction with the Outlet Manager, and Exel installer. The tests are scripted in the following sections and are only started on completion of all the installation activities described in sections 5.

7.1 Purpose of acceptance tests

The processes detailed in this section demonstrate the following;

- Horizon equipment installed is operating correctly,
- Outlet Manager logon is operating correctly.

7.2 Sequence of events

The following equipment has been demonstrated during the installation process;

- Keyboard - used to acknowledge commands during the auto configuration phase and logon phase,
- Bar code reader - used to scan the post office identifier on the counter during the auto configuration phase,
- Smart card reader - used to invoke Post Master Log on process,
- Touch screen - used during the auto configuration and Post Master Log on phase,
- ISDN line - used during the auto configuration phase.

The following operations are demonstrated during this acceptance phase;

- Swipe card reader,
- Counter printer

7.2.1 Swipe card reader

Demonstration of the swipe card reader is achieved using the engineer test facilities provided at release 1c. This requires the Horizon Field Support Officer to establish with the outlet manager a test user in the “engineering group”. The test user is then logged on to the system and the select the test reader icon in the engineer facilities. A test card is provided to the Horizon Field Support Officer who will demonstrate the process. A successful read is indicated with a successful message in the application.

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7.2.2 Counter printer

Demonstration of the counter printer is achieved using the engineer test facilities provided at release 1c. Using the test user established in section 7.2.1 the slip printer icon is selected and a test message is printed on a slip receipt and the tally roll.

7.3 Responsibility

The responsibility for the acceptance tests at this release is the Exel installer and the Horizon Field Support Officer.

7.4 Action on success

The Exel installer will connect the ISDN phone to the right hand ISDN channel and dial the Horizon System Help Desk using the number provided by the Horizon Field Support Officer. This number is documented in the HFSO procedures guide. The Horizon Field Support Officer will report that the installation and acceptance of the equipment is complete.

After the phone call has been successfully made the Exel installer performs the following;

- Disconnect the ISDN telephone
- Clear installation packaging from the outlet
- Leave the outlet

7.4.1 Action by Pathway Support Services

On receipt of the acceptance telephone call, the call is registered with the Horizon rollout help desk.

The Horizon equipment is then supported as a Steady State system.

Full transfer of the Horizon counter system occurs at the end of the next working day after which the following actions are carried out by the Horizon rollout help desk

- Issue of a management report of operational equipment
- Check of Steady State documentation completion pack. (This is fully completed on receipt of acceptance and equipment delivery forms from Exel).

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7.5 Action on failure

Should any problems be encountered during the acceptance phase for IGL and new installations the Exel installer will use the ISDN telephone to contact the Exel help desk with details of the problem encountered for advise.

The ISDN phone can be plugged in to the right hand ISDN channel without impact on the Horizon counter equipment.

The Exel help desk will advise the installer on the next course of action which is based on the following;

- Contact the Horizon System Help Desk reporting details of the failure.
- Replacement of a failing item or piece of equipment using the spares carried in the delivery van on advise from the Horizon System Help Desk.

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8 Migration activities

Migration activities are those processes required to “bridge” the gap between equipment installation, testing and acceptance and operational service.

For release 1c, these processes are carried out by the Horizon Field Support Officer in conjunction with the Outlet Manager. At this release the activities involve the setting up of users on the system only. The specific activities are detailed in Ref.[2]).

The specification of the acceptance form is agreed between POCL and Pathway. (Appendix A)

8.1 Action on success

No further action is required at release 1c on successful performance of the migration activities.

The Horizon system moves to Operational Service.

8.2 Action on failure

Any problems encountered during the migration phase are reported through the Horizon System Help Desk.

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Appendix 1

HORIZON ACCEPTANCE OF SYSTEMS FUNCTIONALITY DOCUMENT

I accept that the functionality provided by the Horizon system has been made available following the system upgrade.

Post Office

FAD Code

Outlet Manager

Signature

Name		Date
		Time

Horizon Field Support Officer

Signature

Name		Date
		Time

For, and on behalf of, ICL Pathway

Signature

Name		Date
		Time

Appendix 2

HORIZON

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PROOF OF DELIVERY DOCUMENT

Post Office Number Telephone Number	
Contact name Post Office Address Post Code	

Equipment Description	PC Base Unit Keyboard	Printer
Total Number of Systems Post master log on cards		

I am aware that the equipment delivered, upgraded and installed by the representatives of ICL Pathway remains the property of ICL Pathway

Outlet Manager

Signature

Name		Date
		Time

For, and on behalf of, ICL Pathway

Signature

Name		Date
		Time

Appendix 3

HORIZON

PROOF OF COLLECTION DOCUMENT

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Post Office Number Telephone Number	
Contact name Post Office Address Post Code	

The following equipment has been collected as part of the system upgrade

Equipment Collected	**PC Base Unit Keyboard**	**Printer**
Total Number of Items collected		

Outlet Manager

Signature

Name		Date
		Time

For, and on behalf of, ICL Pathway

Signature

Name		Date
		Time