

ICL Pathway

**Training Scheduling and Minimum
Training Compliance**

Ref: IMP/REQ/014
Version: 1.0
Date: 27/5/98

Document Title: Training Scheduling and Minimum Training Compliance

Document Type: Process

Abstract: This document describes the processes undertaken for scheduling user attendance to the Horizon training and awareness events delivered as part of Live Trial and National Rollout. This covers the standard user programmes of Management Infrastructure Briefings, User Awareness Events and User Training for both outlets and POCL Head Office staff.

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0 Document control**0.1 Document history**

Version	Date	Reason
0.1	27/2/98	First Draft for initial comments following a joint workshop between POCL and ICL Pathway
0.2	23/4/98	Comments incorporated after 1 st Draft
1.0	27/5/98	All comments included & issued for sign-off

0.2 Approval authorities

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0.3 Associated documents

	Reference	Vers	Date	Title	Source
1	SY/REP/021	1.0	19/10/97	Standard Reports and Formats	ICL Pathway
2	PATH/39/016	0.2	1/4/98	Horizon Communications Document	ICL Pathway
3	IMP/DOC/004	1.4	14/11/97	Split Implementation Proposal	ICL Pathway
4	BP/TRN/001	3.3	23/3/98	Training and User Awareness Baseline	ICL Pathway
5	IM/REQ/024	0.2	23/4/98	Management Infrastructure Briefing Reference Document	ICL Pathway
6	IM/REQ/025	0.2	23/4/98	User Awareness Reference Document	ICL Pathway
7	IM/STR/040	0.2	30/3/98	Scheduling Strategy	ICL Pathway
8	SU/PRO/025			Peritas Process Manual	Peritas

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0.4 Abbreviations

MIB	Management Infrastructure Brief
RODB	Roll Out Database
MTC	Minimum Training Compliance
POCL	Post Office Counters Ltd
ROSD	Roll-Out Support Desk
TAC	Training Administration Centre
TPAS	Training Project Administration System
SPMR	Subpostmaster
UAE	User Awareness Event
HSHD	Horizon System Help Desk

0.5 Changes in this version

1. Comments from V0.2 included

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1 Introduction

This document details the training scheduling processes used by Peritas for the User Training, Management Infrastructure Briefing and the User Awareness Event. This is a high level document which does not duplicate the detail found in the Peritas call scripts (see Horizon Communications Pack - Ref [2]) or the information covered in the Scheduling Strategy Ref [7].

2 Scope

The processes contained in this document are detailed in flowchart format with supporting text to provide clarification. This document does not attempt to detail every possible scenario, concentrating instead on the standard approaches that Peritas will be using. The procedures and processes used in other scenarios are detailed in the Peritas Procedures manual Ref [8].

This document concentrates on the role and responsibilities of Peritas in the training scheduling process carried out on behalf of ICL Pathway during rollout. It shows what action needs to be taken at each stage, including time scales and, where appropriate, the individual responsible for completing the action. The interfaces with POCL and ICL Pathway are also shown and the actions required of them are described in broader detail.

This document deals with the standard User Training and does not cover the processes undertaken for the scheduling of Specialist Training. That area will be covered in a separate document.

3 Using This Document

Each section contains a flowchart which illustrates the process to be followed. These are supported by explanatory text. The text will refer to relevant call scripts and other documents. Cross -references to these documents have been included where appropriate.

4 Management Infrastructure Brief (MIB)

4.1 Overview

The MIB is run as part of the Infrastructure phase and is designed for the SPMRs and Office Managers. It provides them with information about the activities involved in the roll-out, and focuses on their role and responsibilities during the Site Survey and Site Preparation stages. The MIB takes place in Week 6 of the Infrastructure Phase.

Please refer to Appendix A for more details about the Infrastructure Phase.

4.2 Process Detail

(Flowchart held at the end of this section on page 9.)

1. The RODB sends this information to Peritas to be loaded into TPAS (Training Project Administration System) as part of the standard daily update.

1. Invitation letters for the MIB are sent to the office contact, inviting the SPMR to attend a briefing. The invitation includes a Response Form which the SPMR is required to completed and return to the TAC, as well as details of the venue. The Response Form confirms the following details:

- office address
- contact telephone numbers
- contact name & job title
- Number and type of staff (i.e. full/part time)
- Relief manager details

1. Peritas sends the Forward Schedule out to the POCL regions and ICL Pathway. This report is produced on the last working day of each week and details all of the MIBs and UAEs scheduled for the next 6 weeks.

Note: Those events which the report states will occur in 5-6 weeks time are only provisional. Those events scheduled for 4 weeks time and less are confirmed events.

1. The SPMR / Office Manager is given 8 working days to return the Response Form to Peritas.

1. If the Response Form has not been returned, the Peritas TAC will

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telephone the SPMR to ensure that they have posted their Response Form. If they have not, they will be encouraged to do so as soon as possible and the relevant information will be requested.

The script for this call is held in the document *Null Confirmation Call MIB*.

1. The Response Form is processed and Peritas captures the details specified in (2) above as well as details of relief staff and the name(s) of the person(s) attending the MIB. The forms are processed daily, as received and details downloaded onto the RODB.
1. On each Saturday, a report is produced which details those post offices who have been invited to the MIB, but have either declined to confirm their attendance or cancelled their reservation.. This report (the MIB Forward Schedule) is e-mailed to ICL Pathway and the relevant POCL regions for their attention.
1. While attendance on the MIB is not compulsory, it is beneficial for all SPMRs & Office Managers to attend. The POCL regions should contact the SPMR by phone to investigate why they do not wish to attend, and encourage them to contact Peritas to discuss appropriate dates.

Note: the POCL region should not discuss potential dates with the SPMR as events may already be full. (This is not the case with MIB, as there is only one MIB event per PO region in any one week, there is no course limit on MIB events.)

1. If they have any query regarding MIB or training, the SPMR can contact the TAC either by phone or in writing. Should they require an alternative date, the TAC will offer them all available dates. (It will be made clear to the SPMR that they should attend a MIB in the same week as the one that they were originally called up for where possible). If the date agreed falls out of the original week the TAC will explain to the SPMR that a briefing pack will be posted prior to them attending the event. The TAC will also explain that delaying the MIB will not delay the rest of the Infrastructure Activities. When they attend the MIB, the trainer will refer to the event as occurring on Week 6. The SPMR must note how many weeks their MIB has been delayed by & adjust the week accordingly (i.e. if they attend a week late, their MIB will be in Week 7).

Note that a briefing pack will only be sent to an SPMR before their MIB if they have deferred the date of their MIB. In this case, a pack will be sent out to ensure that they will understand the requirements surrounding the Site Survey arrangement call before they receive it.

The SPMR can contact Peritas to reschedule their event at any time.

(Note that the process for agreeing a change of date with an SPMR is detailed in *Exception Handling - Request for Change of Training Dates* - see Page 34)

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1. The SPMR / Office manager is contacted by telephone 3 working days before their scheduled MIB event. The call is used to confirm that the date agreed is still convenient for them and to remind them of the details concerning the venue, start times, etc.

The script for this call is held in document *72 hour Confirmation Call for MIB*.

1. The MIB events are evening events, beginning at 7pm and finishing by 9:00pm. The event itself lasts for about 1 ½ hours (but may vary dependant on the length of the Question and Answer session). The MIB is run by a Peritas Trainer on behalf of ICL Pathway, supported by a POCL representative. Both stay behind after the event to answer any queries the attendees may have. Once the SPMR has finished with the video, it can be returned to ICL Pathway at the address provided.
1. At the end of each week, briefing packs are sent out to all those SPMRs whose scheduled events occurred during the week and who have not received a briefing pack. The packs comprise the Management Infrastructure Brief (provided as a handout to attendees on the event) and a copy of the MIB Video (shown as part of the event.)
1. The RODB is updated with details of the MIB activities. Standard reports are generated to ICL Pathway and POCL by Peritas as detailed in the ICL Pathway *Standard Reports and Formats* Ref [1].

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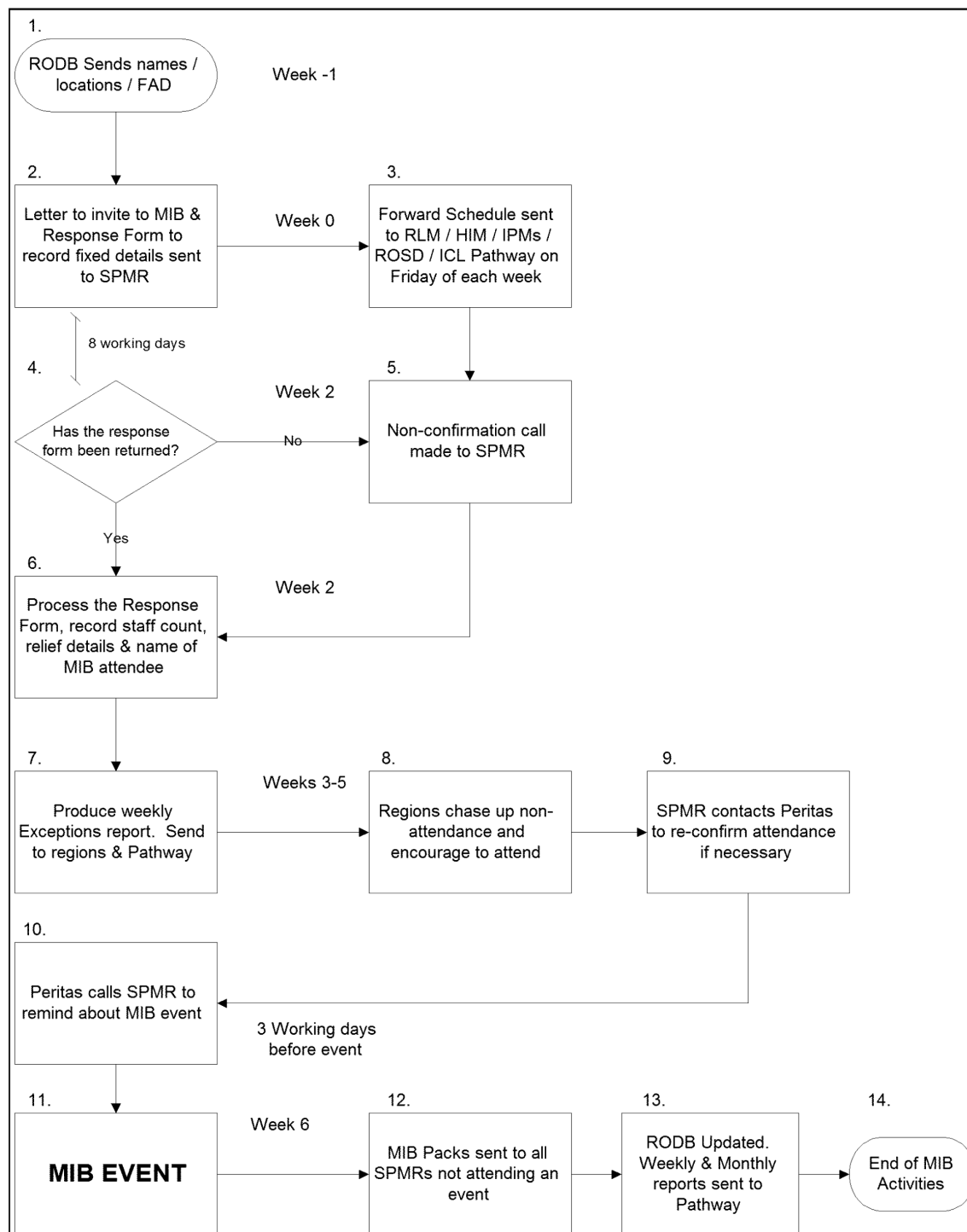


Figure 1 - MIB Scheduling Process

5 User Awareness Event (UAE)

5.1 Overview

The UAE is run as part of the Installation phase and is designed for all post office staff and outlet users. The event concentrates on the issues surrounding the installation of the Horizon System as well as giving an overview to the changes to POCL business as a result of Horizon. The UAE also explains the training process and describes the events and activities which will take place around the actual Horizon System installation. The UAE takes place in Week 5 of the Installation Phase.

Please refer to Appendix A for more details on the Installation Phase.

5.2 Process Detail

(Flowcharts held at pages **Error! Bookmark not defined.** and **Error! Bookmark not defined..**)

1. The RODB sends this information to Peritas, to be loaded into TPAS as part of the standard daily update.
1. Peritas schedules UAE and the User Training events based on the installation date provided by RODB.
1. Peritas sends the Forward Schedule out to the POCL regions and ICL Pathway. This report is produced on the last working day of each week and details all of the MIBs and UAES scheduled for the next 6 weeks.

Note: Those events which the report states will occur in 5-6 weeks time are only provisional. Those events scheduled for 4 weeks time and less are confirmed events.

1. Invitation letters for the UAE are sent to the SPMR or outlet manager. These invite users to attend a UAE and provide details of venue, etc. The letter also confirms the installation date. The SPMR is also sent a Training Questionnaire which confirms the names of all the staff and asks the SPMR to indicate which staff require to attend a Managers course instead of the standard event for Counter Assistants.
1. The SPMR / Office Manager is given 8 working days to return the Training Questionnaire to Peritas and confirm their attendance at the UAE.

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1. If the Questionnaire has not been returned, the Peritas TAC contacts the SPMR to that they have posted their Training Questionnaire and to confirm the relevant details.

The script for this call is held in the *Horizon Communications Document* Ref [2].

Note: POCL Headquarters Staff are scheduled on these events using a separate process. This process is detailed in the *Scheduling Specialist Training* document.

1. As part of this call, the TAC takes the details for completion of the Training Questionnaire over the telephone and asks the SPMR / outlet manager to confirm this in writing as soon as possible.

Note: The procedure for scheduling POCL Head Office staff onto events is not covered here and can be found instead in the document *Scheduling Specialist Training* (document under development).

1. The Training Questionnaire is processed and Peritas confirms the names of those attending the UAE, and those staff who need to attend the Managers Course as well as those who need any specialised training (i.e. Auditors training). The RODB is updated with this information each evening.

On each Saturday, a report is produced which details those post offices who have been invited to the UAE, but where the SPMR or outlet manager has not agreed to attend. This report (the UAE Forward Schedule) is e-mailed to ICL Pathway and the relevant POCL regions for their attention. Copies are provided to the Rollout Support Desk (ROSD) for information.

1. While attendance on the UAE is not compulsory, it is beneficial for all staff to attend. The POCL regions should contact the SPMR by phone to investigate why they (or their staff) do not wish to attend, and encourage them to contact Peritas to discuss appropriate dates.

Note: the POCL region should not discuss potential dates with the SPMR as events may already be full.

1. The SPMR can either contact Peritas by phone or in writing. Should they require an alternative date for themselves or their staff, Peritas will offer all of the dates available to them. These dates will cover venues both inside and outside their standard post office catchment area (i.e. 30 miles). This is to ensure flexibility and that the opportunity is available to assist with the scheduling. It will be made clear to the SPMR that they and their staff should attend a UAE in the same week as the one that they were originally called up for (where possible). The SPMR can contact Peritas to

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reschedule their event at any time before the Reminder Call is made (3 days prior to the event).

(Note that the process for agreeing a change of date with an SPMR is detailed in *Exception Handling - Request for Change of Training Dates* - see Page 34)

1. The SPMR / outlet manager is contacted by telephone 3 working days before the first scheduled UAE event for their office. The call is used to confirm that the date agreed is still convenient for them and their staff and to remind them of the details concerning the venue, start times, etc. It is the responsibility of the SPMR / outlet manager to remind their staff.

The script for this call is held in document *72 Hour Confirmation Call for UAE*.

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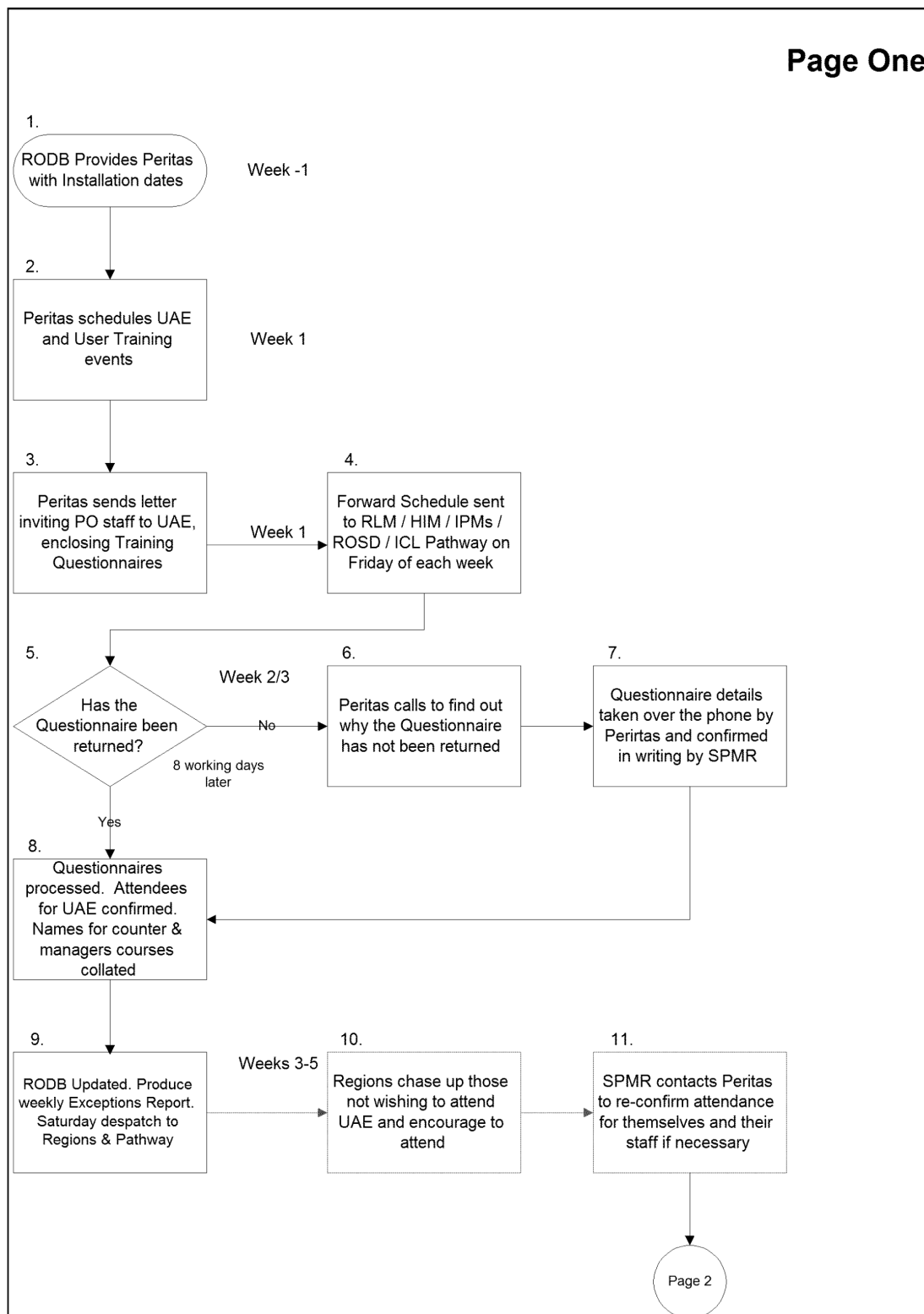


Figure 2 - UAE Scheduling Process Page 1

1. The UAE events are evening events, beginning at 7pm and finishing by 9:00pm. The event itself lasts for approximately 1 ½ hours and is run by a

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Peritas Trainer on behalf of ICL Pathway, supported by a POCL representative. Both stay behind after the event to answer and queries the attendees may have.

1. At the end of each week, UAE packs are sent out to all those SPMRs whose scheduled events occurred during the week and who did not attend. The packs comprise the User Awareness Brief (provided as a handout to attendees on the event) and a copy of the UAE Video (shown as part of the event.) This is returnable to ICL Pathway at the address provided.
1. The RODB is updated with details of the UAE activities. Standard reports are generated to ICL Pathway by Peritas as detailed in the ICL Pathway *Standard Reports and Formats* Ref [1].

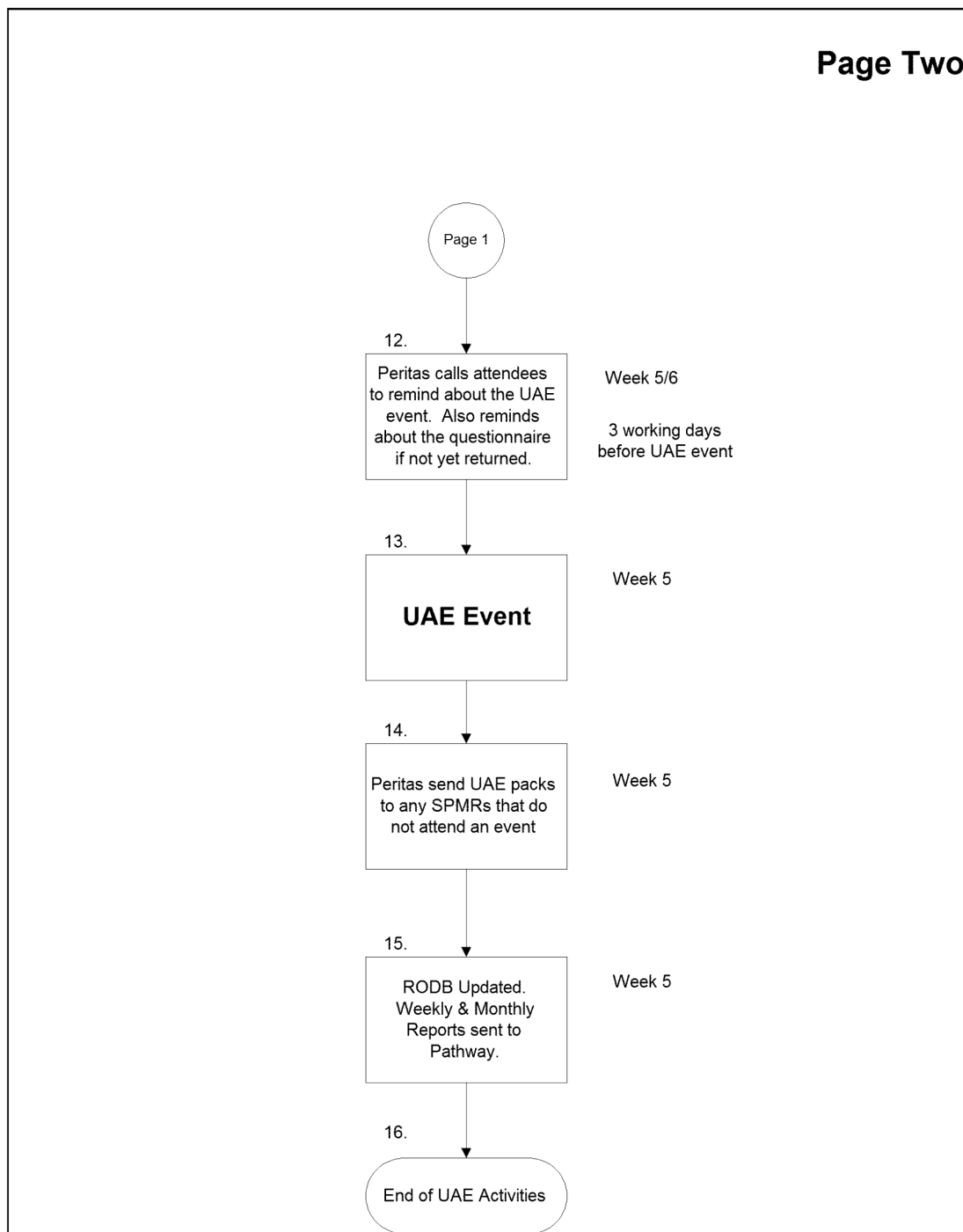


Figure 3 - UAE Scheduling Process Page Two

6 User Training

6.1 Overview

The User Training events take place in the period surrounding the Installation Date for each post office. The majority of the training will take place during the 5 working days prior to Installation. The rest will take place up to 2 working days afterwards. Minimum Training Compliance (MTC) must be achieved before the Installation Date. MTC is defined as being sufficient staff to run the Horizon System under normal working circumstances. The exact number for each post office is defined by POCL in the Minimum Training Compliance matrix (document to be defined).

User Training comprises standard training (i.e. for managers and counter clerks as detailed below) and specialist training (i.e. for Auditors, Help Desk and Trainers and is detailed in a separate the POCL specialist training document Ref [9]. The courses included in User Training are:

- Horizon for Postal Officers (1 day)
- Horizon for Counter Assistants (1 day)
- Horizon for Branch Managers (1½ days)
- Horizon for Outlet & Franchise Managers & SPMRs (1 ½ days)

All courses include a competency test which attendees must pass before they are allowed to work on the Horizon System. Attendees are given three chances to pass the test, after which they are passed to POCL. POCL will provide them with help to bring them up to standard or take other action. Peritas also provides Remedial Training to help staff who have failed to get through the competency test. This takes the form of a 1-2 hour tutorial run in the evenings where staff can concentrate on areas they found difficulty with and then retake the applicable sections of the competency test. Staff are given three attempts to pass the competency test. If they have still not passed after their third attempt, POCL assumes the responsibility for their training.

6.2 Process Detail

(Flowcharts held at pages 19, 22, 25, 27 and 30)

1. Peritas confirms the training venues, based on their draft schedule and the

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information received in the Training Questionnaire (see *User Awareness Event*, Process Detail, paragraphs 2 and 7).

1. Invitations to attend and a Horizon Booking Form are sent out to the SPMRs / outlet managers at each post office. The Horizon Booking Form details the courses to which staff have been allocated and the invitations include details of dates, times, and venues. The Horizon Booking Form includes instructions to the SPMR. The SPMR has the flexibility to change the staff allocated to courses without contacting Peritas, as long as they do not change the number of places allocated to a particular course or the types of course the staff member is attending.. Once the SPMR has confirmed the dates with their staff, they should return the Horizon Booking Form direct to Peritas. It is the responsibility of the SPMR to check that the dates are suitable for their staff and to make any necessary arrangements for cover during that period.
1. The SPMR / outlet manager is given 8 working days to return Horizon Booking Form to Peritas.
1. Any office who has not returned their Horizon Booking Form within 8 working days will be contacted by telephone by the Peritas TAC. All staff training dates will be secured over the telephone and the SPMR will be asked to forward confirmation in writing as soon as possible, so that a record can be kept.

The script for this call is held in document *Null Confirmation Call User Training*.

(Please note that process boxes 4, 5 and 10 will be dealt with during the same conversation. They represent checks that the TAC operator will make during the course of the telephone call. The conversation will also include discussions on available course dates. The process for changing a course date is detailed in *Exception Handling - Request for Change of Training Dates* - see Page 34).

1. TPAS checks that the number of staff members who can attend is enough to ensure that post office can achieve MTC (as per the Minimum Training Compliance matrix - document to be defined).
1. Should the number of staff able to attend training mean that the post office cannot achieve MTC, the Peritas operator informs the and escalates to the POCL region accordingly. Peritas then flags the post office as a problem to ICL Pathway via the RODB and includes the details on a Daily Exception Report. This report is sent at the end of the day by e-mail to ICL Pathway and the POCL regions. Copies are sent to the ROSD for reference.

1. The POCL regions then take appropriate action to encourage staff to

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attend the training. They should contact the SPMR by phone to investigate why they (or their staff) do not wish to attend, and encourage them to contact Peritas to discuss appropriate dates.

Note: the POCL region should not discuss potential dates with the SPMR as events may already be full.

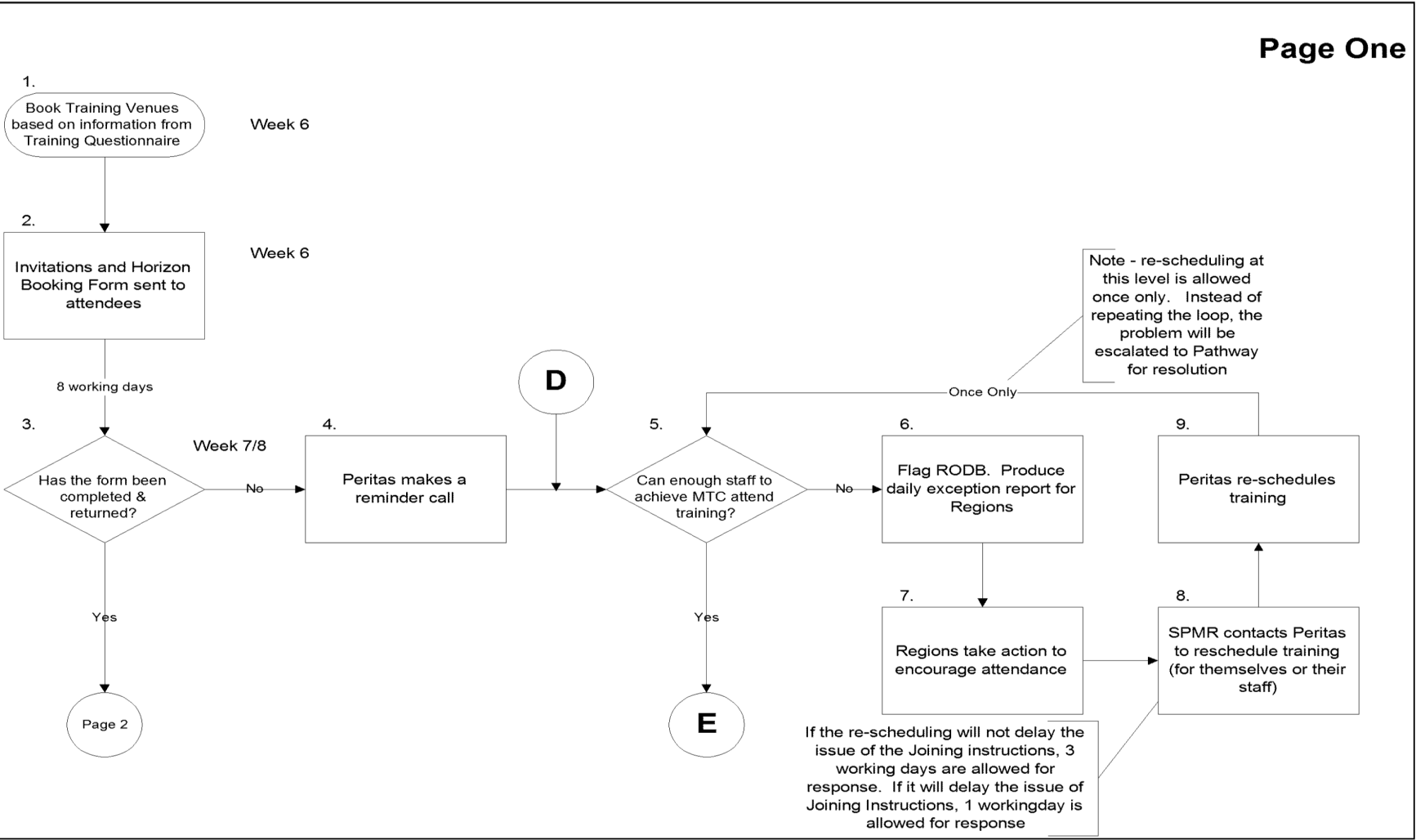
1. The SPMR must contact Peritas by phone. Should they require an alternative date for themselves or their staff, Peritas will offer them all of the dates available to them. These dates will cover venues both inside and outside their standard post office catchment area (i.e. 15 miles). This is to ensure flexibility and that the opportunity is available to assist with the scheduling. The SPMR can contact Peritas to reschedule their event at any time.

The time allowed for the SPMR to respond depends on whether or not the issue of Joining Instructions is being delayed. If it is not being delayed, the SPMR has 3 working days to contact Peritas. If issue of Joining Instructions is being delayed, then the SPMR must reply to Peritas within 1 working day of the report being sent to the POCL region. Failure to respond within the timescales set, will result in Peritas escalating the matter (see text for paragraph 9).

Once the SPMR contacts the TAC, Peritas will do any re-scheduling that is required - as long as dates are available.

Note: Re-scheduling without further escalation is only allowed once. Should the post office still be unable to achieve MTC prior to installation, the matter will be escalated further to POCL. Peritas will flag the post office as a problem to ICL Pathway via the RODB and inform the ROSD of the situation. The ROSD will contact POCL separately. The post office will still appear on the daily exception report issued to ICL Pathway and the POCL regions. No further scheduling will take place for this post office until the SPMR can confirm that sufficient staff to achieve MTC are available within the timescales prior to installation.

Overleaf : Figure 4 : Scheduling for User Training Page One



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1. The Peritas TAC checks to ensure that all staff from the post office are able to attend training before the Installation Date. This ensures that "Go Live" can take place.
1. Should some of the post office staff not be able to attend training, the Peritas operator informs the SPMR that the matter will be raised with the POCL region. Peritas then includes the details on a Daily Exception Report. This report is sent at the end of the day by e-mail to ICL Pathway and the POCL regions and copies to the ROSD for reference.
1. The POCL regions then take appropriate action to encourage staff to attend the training within the contractual training window. They should contact the SPMR by phone to investigate why they (or their staff) do not wish to attend, and encourage them to contact Peritas to discuss appropriate dates.

Note: The POCL region should not discuss potential dates with the SPMR as events may already be full.

1. The SPMR must contact Peritas by phone. Should they require an alternative date for themselves or their staff, Peritas will offer them all of the dates available to them. The SPMR can contact Peritas to reschedule their event at any time up to the issue of the Joining Instructions (3 weeks prior to the course). At this stage, Peritas may also offer training up to 2 working days after the Installation Date. Peritas will be as flexible as possible in offering alternative dates to minimise disruption to scheduling and go live. Those offered will be both inside and outside the standard distance from the post office (15 miles).

The time allowed for the SPMR to respond depends on whether or not the issue of Joining Instructions is being delayed. If it is not being delayed, the SPMR has 3 working days to contact Peritas. If issue of Joining Instructions is being delayed, then the SPMR must reply to Peritas within 1 working day of the report being sent to the POCL region. Failure to respond within the timescales set, will result in Peritas escalating the matter to POCL (see text for paragraph 9). Copies of the report will be sent to ICL Pathway and the ROSD for reference.

1. The Peritas Operator will check that all staff are now allocated onto training courses. This ensures that "go live" can take place.
1. If any post office staff are not assigned to training dates, Peritas will report this to ICL Pathway Steady State and the POCL regions. This will be done using the Daily Exception Report which will be e-mailed to ICL Pathway and the POCL region.
1. The Peritas operator will schedule training for all those staff who can attend within the contractual training window.

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1. The Peritas TAC confirms the scheduling of all staff onto training events.

Twelve working days before the first training event for a post office, Peritas will issue Course Joining Instructions. These are sent to the office contact (usually SPMR or outlet manager) for distribution to their staff. The Joining Instructions will confirm the date, time and venue for the event as well as directions to the venue. It is the office contacts responsibility to distribute these to their staff as quickly as possible.

Note: Transport to and from the venue will be the responsibility of SPMRs / outlet managers and staff and not ICL Pathway.

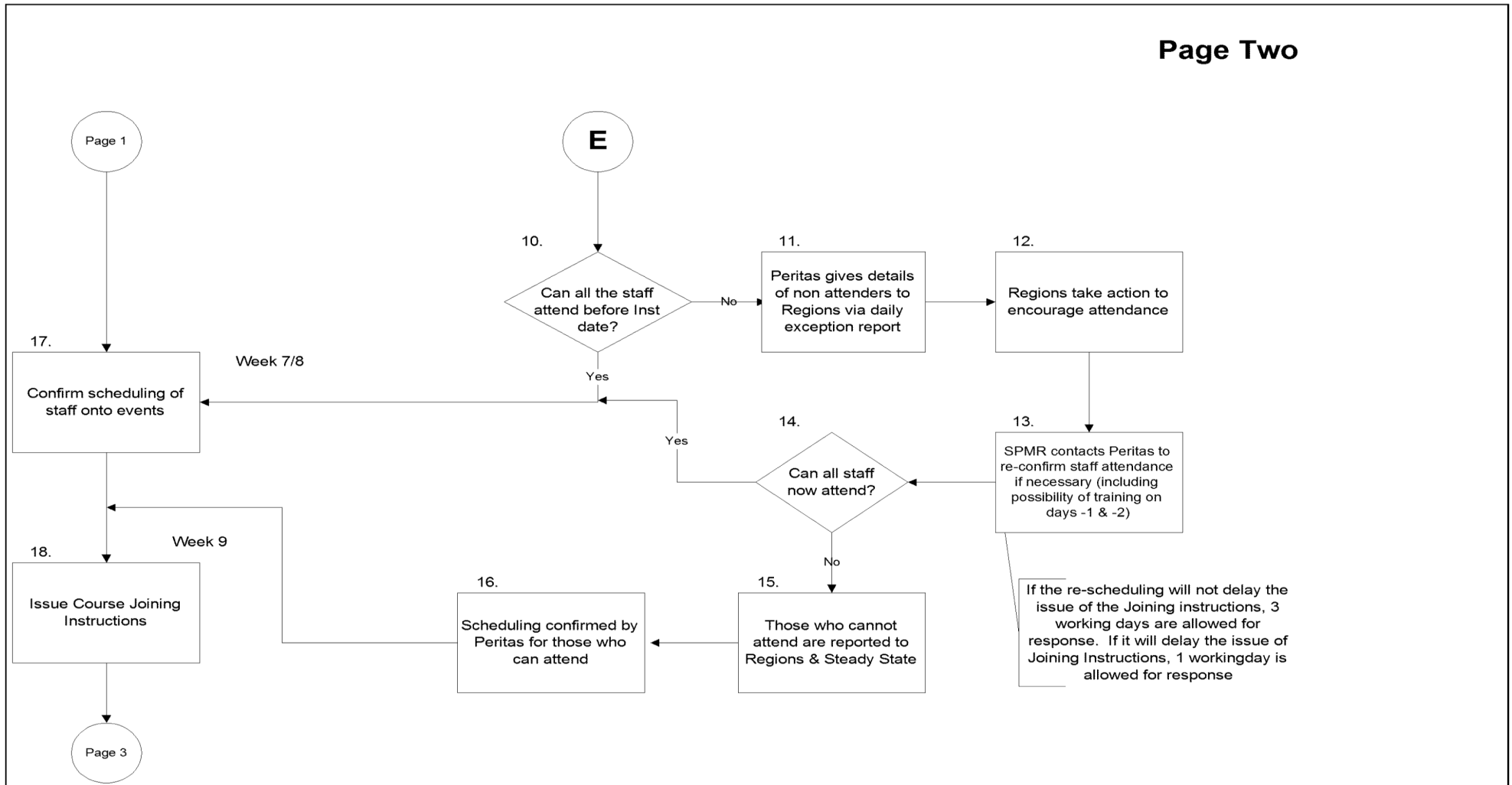
Overleaf : Figure 5 : Scheduling for User Training Page Two

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1. The office contact (SPMR or outlet manager) will be contacted by telephone 3 working days before the first training event scheduled for their office. This call confirms the dates for ALL staff attending training. The Peritas operator ensures that venue details are correct.

The script for this call is held in document *72 Hour Confirmation Call User Training*.

1. Part of the above call checks that individuals can still attend.

Please note that this section of the flowchart represents the key areas that the Peritas operator will cover whenever an individual tells Peritas that they cannot attend their scheduled training date. To that end, this section should be read with *Exception Handling - Request for Change of Training Dates* - see Page 34 which covers the general procedure for dealing with this situation.

1. Firstly, the Peritas operator checks to see if the individual concerned can be re-scheduled before their assigned Installation Date.
1. If they cannot be re-scheduled before their Installation Date, the Peritas operator checks to see whether achievement of MTC for that office is threatened or affected.
1. If MTC is threatened by the individual being unable to attend, Peritas sets a flag on the RODB to alert ICL Pathway. Peritas also raises the issue with the ROSD for escalation within the POCL region. Details are included on the daily exception report which is e-mailed to all parties for resolution.
1. Should non-attendance not affect the achievement of MTC, the individual is then offered training up to 2 working days after their Installation Date. This offer is authorised by a TAC supervisor or manager before being made by the operator. Notification will be confirmed via exception reports to ICL Pathway, Steady State, ROSD and POCL respectively.
1. If the individual can still not attend, the situation is raised as an issue with ICL Pathway via the ROSD and detailed on the daily exception report to POCL. The report will be sent out to the POCL region and ICL Pathway at the end of the day. Copies will be sent to the HSHD accordingly.
1. The POCL regions should then take action to encourage the individual to attend within the contractual training window. They should not offer alternative dates as there may be no spaces available. Instead, they should encourage the individual to contact Peritas again to agree dates.
As before, Peritas will be as flexible as possible in offering alternative dates to minimise disruption to scheduling and go live. Those offered will

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be both inside and outside the standard distance from the post office (15 miles).

Note: At this stage, the individual **MUST** contact Peritas within 1 working day of the issue being raised. This post office will now be on the critical path and could be removed from the rollout schedule and placed into the Sundries programme later in the timetable.

1. The SPMR (or the individual concerned) must contact Peritas by phone. Peritas will offer them all of the dates available to them, including the possibility of training up to 2 working days after the Installation Date. (These days are seen as contingency). Peritas will be as flexible as possible in offering alternative dates to minimise disruption to scheduling and go live. Those offered will be both inside and outside the standard distance from the post office (15 miles).

1. The Peritas operator will re-schedule them where possible.

1. Should it still be impossible to schedule the individual, Peritas will raise a flag on the RODB and inform the ROSD of the situation. The ROSD will then escalate the problem further with POCL. Details will be included by Peritas on the daily exceptions report.

1. Peritas will re-schedule the individual with the dates agreed. Over the telephone, they will confirm details of date, time and venue. Written confirmation will be sent to the individual (via their office contact).

The User Training lasts either 1 or 1 ½ days. Both courses start at 9am and last until approximately 5pm. (The second day of the Managers Course finishes at approximately 2pm).

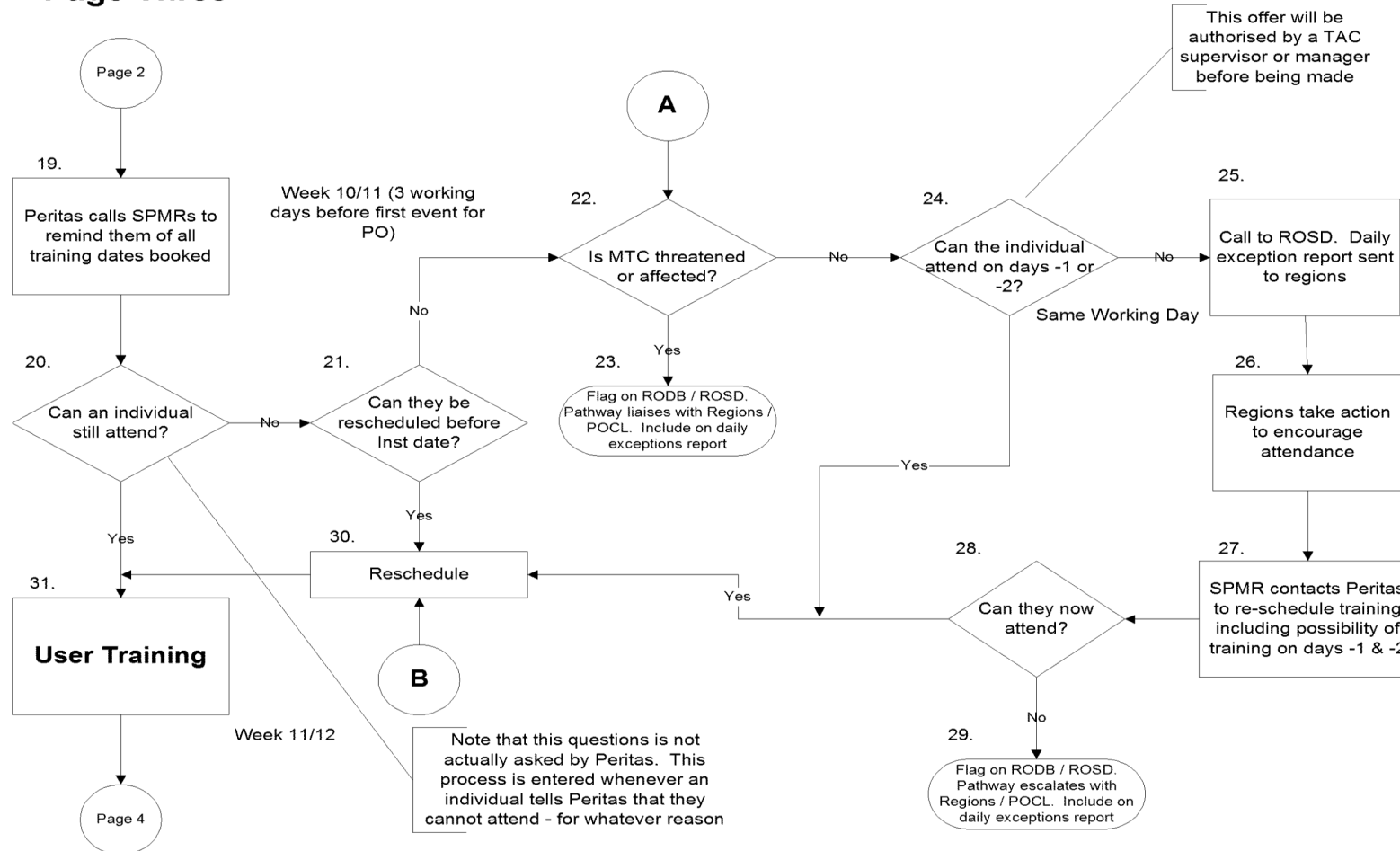
Overleaf : Figure 6 : Scheduling for User Training Page Three

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The following section of the process deals with the process to be taken should an individual not arrive for their scheduled training. and the action taken. It then looks at the action taken by the trainer at the end of the course.

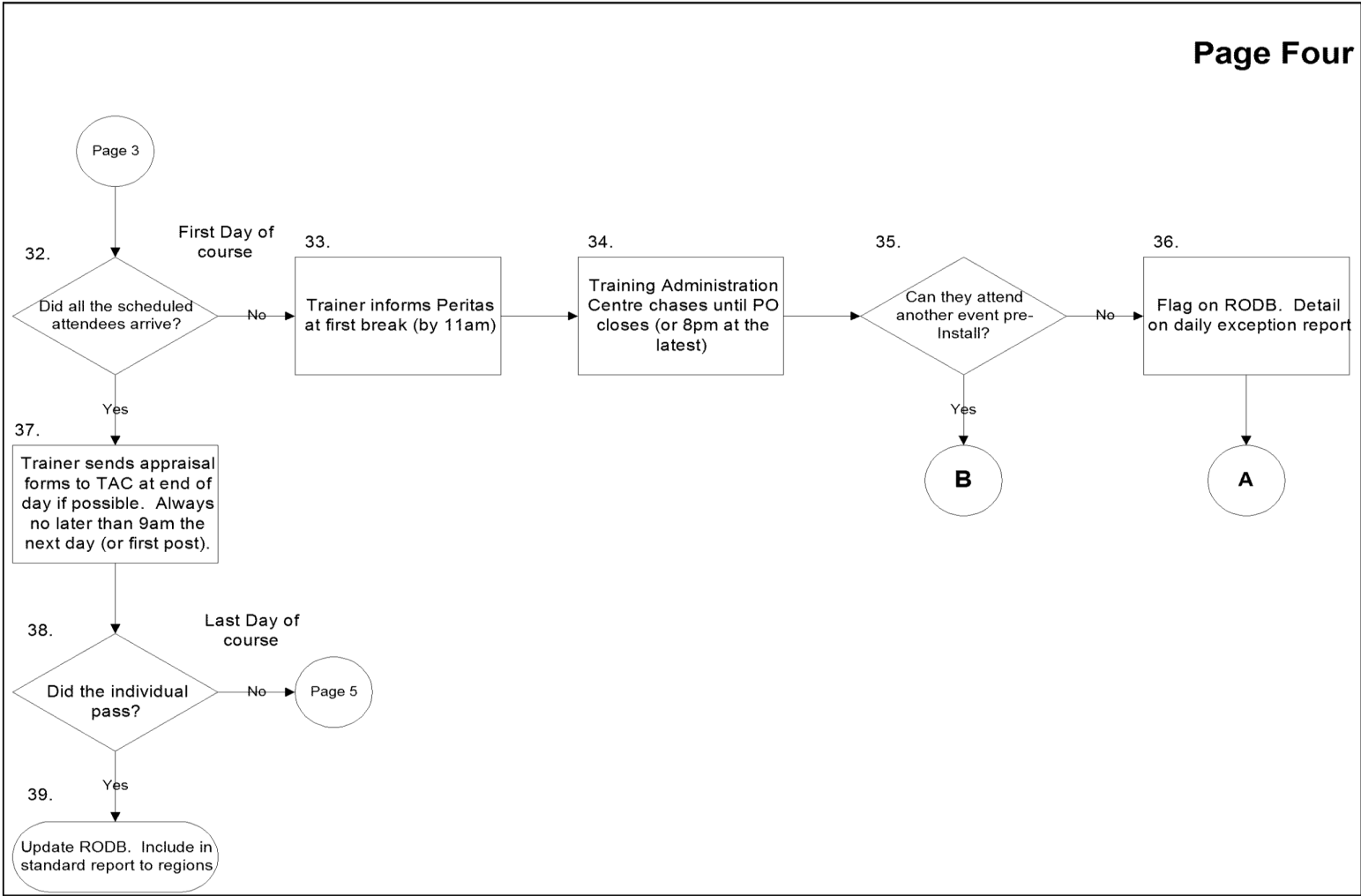
1. The trainer is sent a list of all the attendees for each event by the Peritas TAC. As people arrive, the trainer checks their names against those who are expected.
1. If any individuals fail to appear, the trainer contacts Peritas at the first coffee break in the course and informs them of the individuals name & FAD code. This will occur by 11am at the latest.
1. The TAC will follow this up with the individual direct. They will contact the post office to check why the individual has failed to appear. They will continue attempting to contact the individual until the normal closing time for the post office, or until 6pm (whichever is earlier).
1. If the Peritas TAC can contact the individual, they will attempt to re-schedule them on a course prior to their post office installation date. This will be confirmed in writing on the same day.
1. If the individual cannot attend an event (or the Peritas TAC has been unable to contact them), ICL Pathway will be alerting by Peritas raising a flag on the RODB and details will be automatically included on the daily exception report to POCL. Copies will be provided to the HSHD for reference.
1. At the end of the day - after any remedial training has taken place - the trainer sends the appraisal forms to the Peritas TAC. If they cannot be sent that day, they are sent by 9am on the next working day.

(NB - this action takes place after actions 38-49. It has been included in this position for reasons of clarity.)

1. The trainer checks the results of each persons competency test to ensure that they have achieved the pass mark (which is 90%).

The Peritas TAC includes details of those passing the course on the monthly report *User Training Competence Test Summary*. The RODB is updated when MTC or Fully Trained status is achieved.

Overleaf : Figure 7 : Scheduling for User Training Page Four



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1. The trainer talks to the individual about their options for remedial training, and tries to arrange immediate remedial training where at all possible.
1. Before any remedial training takes place, the trainer contacts the Peritas TAC and provides a verbal report and update. This report details all those who have failed the competency test. This takes place by 6pm and is also recorded on the delegates appraisal forms for audit purposes.
1. During the telephone call (and assuming the individual cannot attend immediate remedial training), the trainer gets the TAC to check for available remedial training dates.
1. The TAC checks to see if failing the competency test has caused MTC to be threatened or affected.
1. If MTC is affected, the TAC raises a flag on the RODB, and raises the issue with the ROSD for escalation to the POCL regions.
1. ROSD escalates the issue with ICL Pathway and POCL, who assess the impact on the installation and decide on an appropriate course of action. One working day is allowed for a decision to be reached by both parties. The Peritas Training Administration Centre is informed via the HSHD accordingly.

Note: Remedial training will continue to be offered by Peritas while the best course of action is being determined as part of the above escalation process.
1. At the end of any remedial training, the TAC collates all the information received and generates a report which summarises all of that days results. This report is e-mailed to ICL Pathway.
1. Before finalising any remedial training, the trainer (together with the TAC) checks that the individual has not already taken 3 competency tests.
1. If the individual has just failed their 3rd competency test, they are not re-scheduled for a further remedial training event. Instead, Peritas informs ICL Pathway by raising a flag on the RODB and informs ICL Pathway Steady State and POCL via the daily exception report. POCL takes on the responsibility for determining the most appropriate course of action as per their agreed policy. Notification to ICL Pathway Steady State takes place to ensure that non-competent users are not using the system.

The trainer and the TAC check to see if the individual can be re-scheduled. If the individual concerned is vital to achievement of MTC, the training must take place prior to their Installation Date. If they are not, they can be re-scheduled up to 2 working days after the Installation Date.

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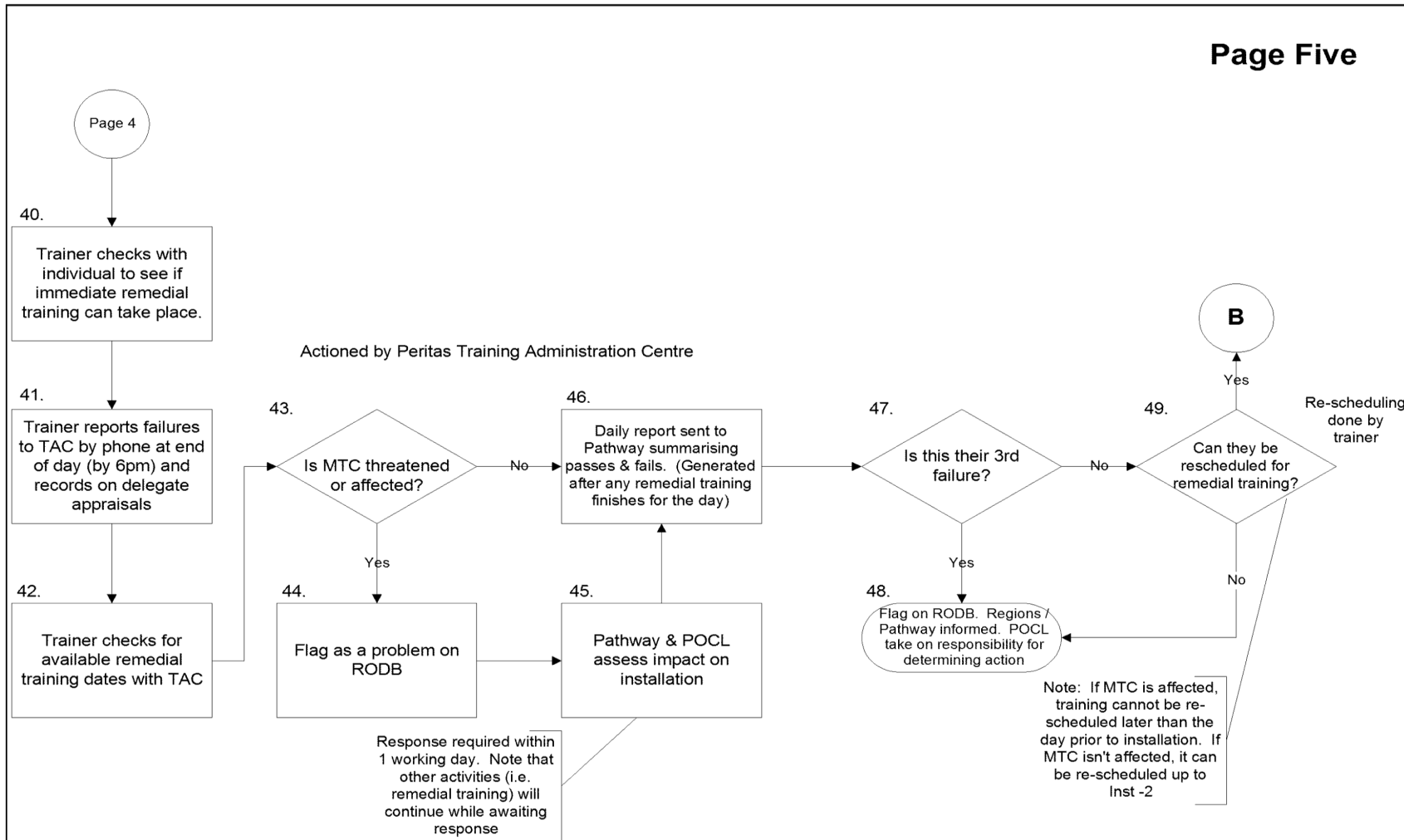
Overleaf : Figure 8 : Scheduling for User Training Page Five

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7 Exception Handling - Request for Extra Course Places

7.1 Overview

This process is used whenever an office contact (either SPMR or outlet manager) contacts Peritas to request an extra place on a course.

Note: This is used ONLY when the SPMR / outlet manager is requesting a place for an individual who is not part of the recorded staff complement (as captured during the *Management Infrastructure Brief* activities and confirmed using the Training Questionnaire sent out with the *User Awareness Event* invitation).

7.2 Process Detail

(Flowchart held at page 33).

1. This process is started by Peritas issuing training dates or invitations - dependant on whether the event in question is a User Training event or a MIB or UAE.
1. The TAC is contacted by the office contact or by POCL Head Office. This contact can be by telephone or by post.
1. The contact includes a request for an individual other than those recorded on the staff complement to attend an event.
1. The TAC checks to see what role the individual plays in the running of the post office and availability of places within that post office's training window.
1. If they are an Area Manager or a Relief, the individuals details are recorded in a Relief record within TPAS.
1. If they are staff members at the post office (either full time, part time or occasional staff), their details are noted and added onto TPAS as a new staff member within the post office record. Details are passed to POCL for information via e-mail. Copies are sent to ROSD and ICL Pathway for reference.

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1. If they have no role in running the post office, the request is refused.
1. If they are a landlord, they are permitted to attend the MIB event, but not the UAE or User Training
1. Peritas schedules the individual onto an event as per normal procedures (see appropriate sections within this document).
1. RODB is updated (if required - i.e. Relief Manager) and Peritas includes the individual on attendance reports as part of the event.

Note: ICL Pathway will train attendees known to them during rollout as part of the above process unless otherwise indicated in writing by POCL prior to individual attendance. All refusals will be the responsibility of POCL if not covered as part of point 7 of this process.

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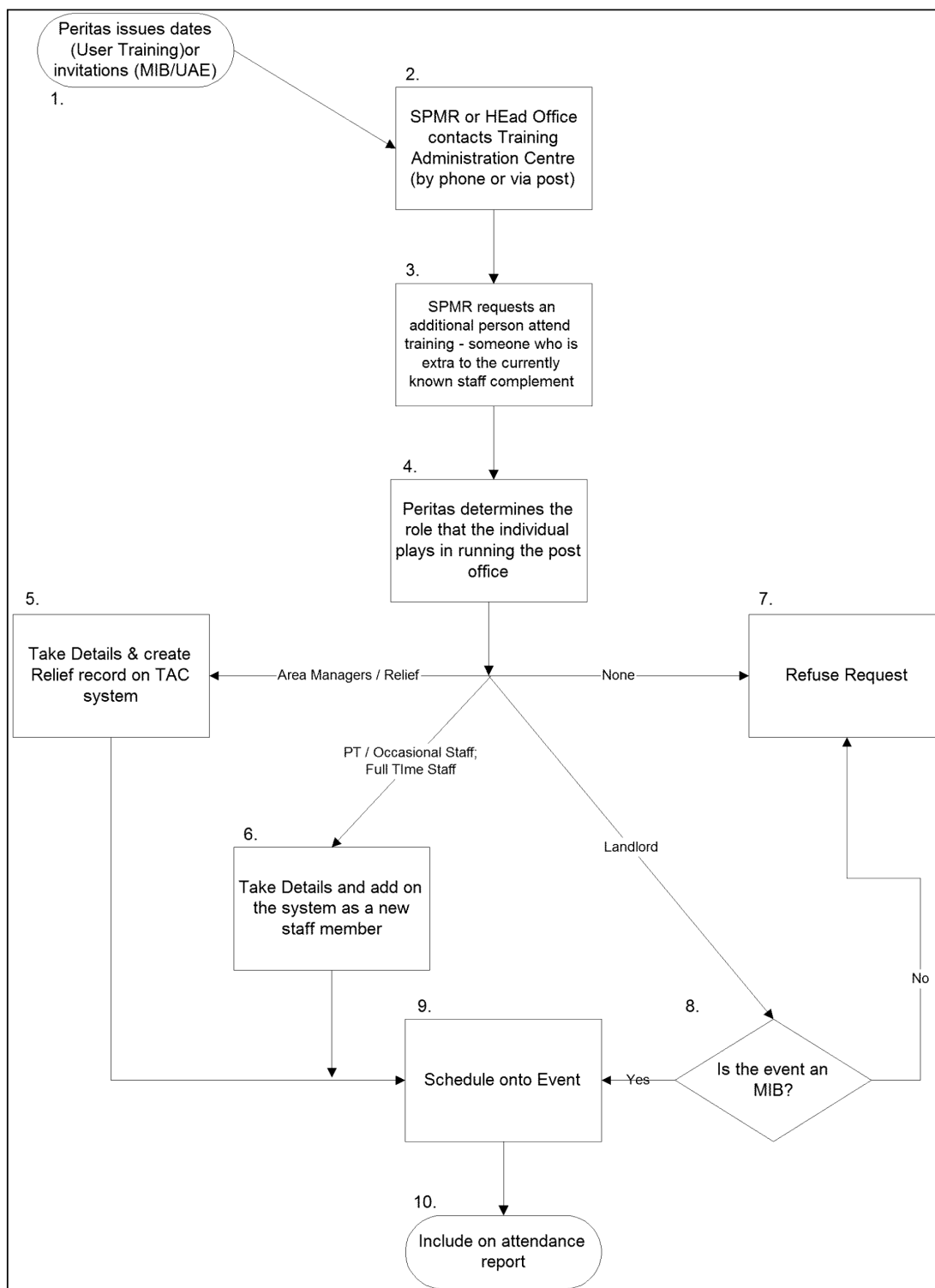


Figure 9 - Process for Requesting Extra Course Places

8 Exception Handling - Request for Change of Training Dates

8.1 Overview

This process is used whenever an SPMR contacts Peritas to request a change of training dates for themselves or their staff.

Note: This contact may be initiated by the SPMR, or it may be initiated by Peritas when they call the SPMR for another reason.

8.2 Process Detail

(Flowchart held at page 36)

1. This process is started by Peritas issuing training dates or invitations - dependant on whether the event in question is a User Training event or a MIB or UAE.
1. This process may also start by POCL regions encouraging the SPMR to contact Peritas after a previous refusal to attend or agree training dates.
1. The TAC is contacted by the outlet contact or by a POCL Head Office representative with a request to change the training dates for themselves or a staff member. This contact can be by telephone or by post.
1. The Peritas operator offers the SPMR all of the available dates within the standard catchment area. (This is a 15 mile radius of the post office for User Training and a 30 mile radius of the post office for MIB & UAE. In some areas, the catchment area will be limited to the region covered by the post offices outbound post code.)
1. The TAC attempts to get a date agreed by offering all available dates within the boundaries specified above.
1. The individual is re-scheduled on the date agreed within the contractual training window.

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1. The Peritas operator offers the SPMR all of the available dates outside the standard catchment area. (This is a 15 mile radius of the post office for User Training and a 30 mile radius of the post office for MIB & UAE. In some areas, the catchment area will be limited to the region covered by the post offices outbound post code.)
1. A call is issued (MIB/UAE), or Joining Instructions are issued (User Training).
1. The TAC attempts to get a date agreed by offering all allowable dates.
1. The individual is marked as an outstanding problem on TPAS. Their details are included on the MIB Forward Schedule or UAE Forward Schedule. Action is taken forward by POCL (see *Management Information Briefing*, paragraph 7 and *User Awareness Event*, paragraph 8).
1. The process continues in the *User Training* section - see Connector D on page 19.

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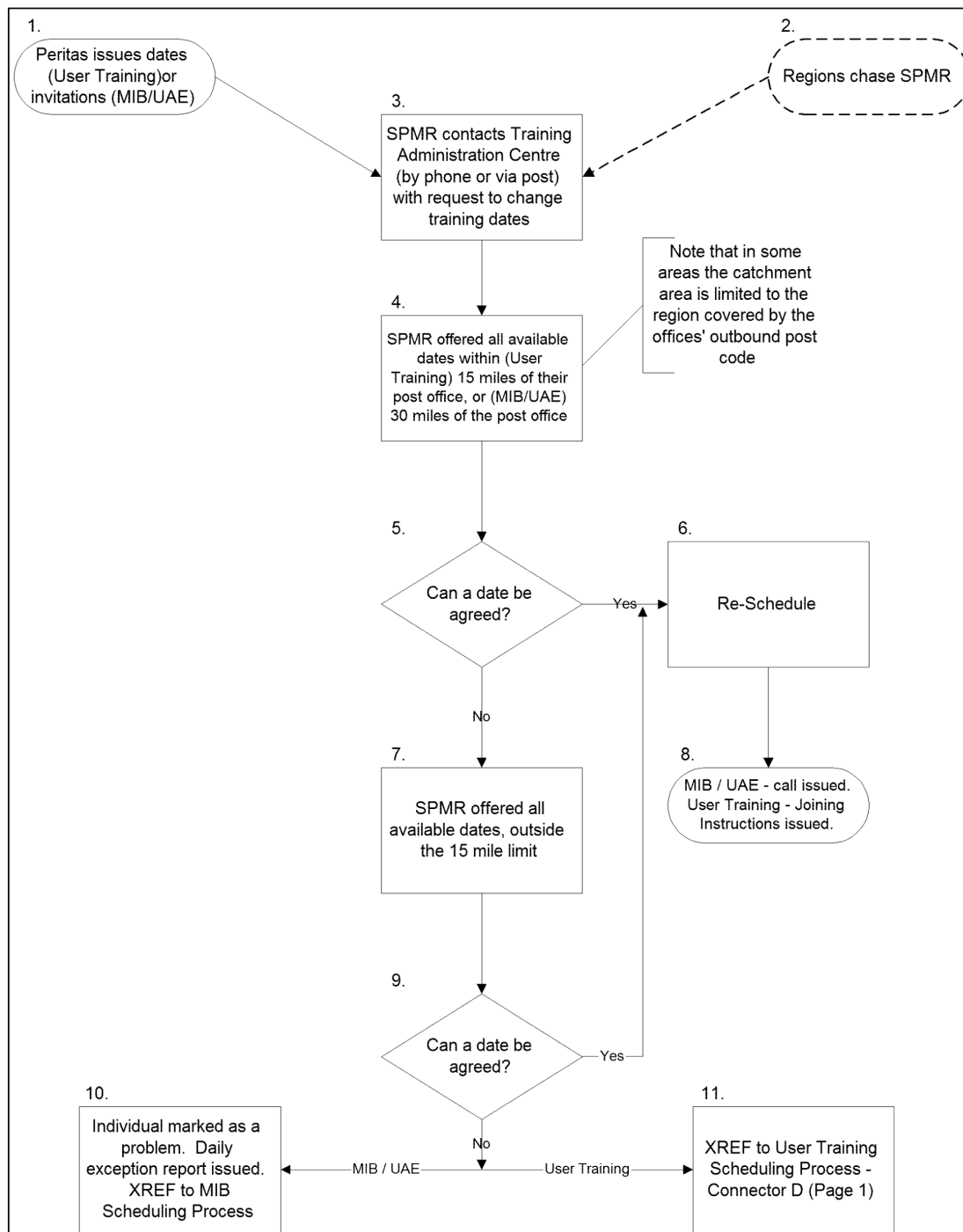


Figure 10 - Process for Dealing with Request to Change Dates

Appendix A - The Split Implementation Programme

The events relating to the elements of both the Infrastructure and Installation phases and their associated timescales are detailed in the tables below.

Note: This information is taken from the Split Implementation Proposal Ref [3]

Infrastructure Activities

Week	Programme	Event
1	Infrastructure	MIB invites sent (Saturday)
2		
3		
4		
5		
6		MIB event
7		Pre survey call made by WTL to office to arrange survey & preparation appointment.
8		
9		Survey of offices takes place.
10		Survey Analysis Schedule POCL re-survey resources (where applicable)
11		Resurvey Call (where applicable) Confirm POCL re-survey resources (where applicable)
12		
13		Resurvey
14		Resurvey Analysis
15		
16		
17		
18		Pre preparation telephone call
19		
20		Office Modifications (Where applicable)
21		
22		Preparation & Acceptance
23		Ready for Installation (RFI)

Installation Activities

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Week	Programme	Event
	Minimum	Installation
	4 Weeks	Scheduling
	From	Period
	Infrastructure	ISDN Installation Confirmed
1	<i>Installation & Awareness</i>	User Awareness invitations Issued.
2		
3		
4		
5		User Awareness event.
6		Training Invitations Issued
7		Training Instruction Received in Offices
8		ISDN Installation
9		
10		
11		Training Event
12		Installation, Migration and Acceptance