



Welcome to the Horizon Online Induction Training

Post Office®



Course Aims and objectives



Objective

We aim to give you all the information and skills that you will need to successfully support a branch from Horizon to Horizon on Line.

You will also receive information to assist you in ensuring that are branches and adhering to conformance and compliance regulations.

Agenda



- Horizon overview
- Admin
- A day in the life.....
- Contents of the migration pack
- Migration process
- Compliance and non conformance



Horizon Next Generation (HNG) – delivering Horizon Online™

Post Office®



Agenda



- Purpose of HNG
- Business Drivers & Current Horizon System
- Future State
- Features: Architecture; Service & Performance; Business Equivalence
- Impacts
- Changes
- Training
- Migration
- Summary
- Questions

Purpose of the HNG Programme



To deliver a significant reduction in the total annual cost of ownership of Horizon, whilst ensuring the system remains fit for purpose in the 21st Century...

... in a dynamic and changing environment.

Recognising that HNG is not operating in a silo - Life goes on in the Business - initiatives like, Rural Strategy, Network Strategy, Packet Strategy, Re-Org all have potential to bring around change (via CR) to the Programme

HNG should also enable the business to reduce the time to market for major developments; should be a simpler system that is easier to change and service manage; should be capable of supporting segments and zones.

The Programme is about developing the current Horizon system to meet business drivers, and is a balancing act between reducing cost and building a system fit for our needs
We will cover this in a little more detail in next few slides

Context



- Programme identified in 2005 ; “To deliver a significant reduction in the total annual cost of ownership of Horizon”
- Programme is a crucial part of forward:five2eleven
- Delivering:
 - A New application;
 - New Data Centres;
 - Revised Service Levels.
- The programme delivering it is “HNG”
- Will be known as “Horizon Online” within the Network

A new application – The look and feel is different

New Data centres – Currently we have two data centres in Wigan and Bootle. These are expensive to maintain. Moving forward we will have new Data centres in NI. These are now up and running and online

Revised service levels – By changing some of the less important parts of the contract we’ve been able to save considerable amounts of money. An example of this would be the 4 hour fix for a keyboard. Whilst this is great it costs a lot of money to maintain. Offices could work without a keyboard if they had to. This has now changed to a 24 hour fix saving significant sums of money.

Horizon online



Horizon Online™:

- is about reducing the Post Office's® operating costs, (around 1m per week) and is a fundamental element of forward:three2eleven
- is based on the principle of “Business Equivalence”
- will look and feel very different to existing Horizon
- but will not radically change transaction processes
- is a fully integrated application - SmartPost no longer “bolted on”
- has been designed to run on existing Branch equipment

Horizon Online™ is about reducing the Post Office's® operating costs, and is a fundamental element of forward:three2eleven
- Horizon is a major cost to the Post Office® and we need to reduce its running costs. In fact, Horizon Online™ is one of the most crucial cost reduction initiative being undertaken by our business.

- Main costs savings in operating costs triggered by a number of events e.g. data centre move, end of roll-out, etc.
- Recognise that the business is changing – increase in on-line transactions; growth of banking products; demise of benefits; introduction of more on-line services via APOP

is not about new functionality – it is based on the principle of “Business Equivalence”

Business Equivalence is a primary design principle for the Programme – we are not about new functionality.

HNG will support the same products and deliver the same financial and operational outcomes as Horizon but how this is achieved may change – this is the definition of Business Equivalence

Mails product will be re-specified We have been sampling views around the business on both UI and Mails, and we have had very positive feedback, including from Subpostmasters.

However, we need to continue to manage firmly any over-expectations of the frontline that Horizon Online will deliver improved functionality – they may see this as a missed opportunity

so will not cure all the issues and problems that users have with Horizon although where practical, and at no extra cost, we have smoothed away a number of “rough edges”.

We have held workshops with Horizon users to discuss the main issues and problems with the current system. We have already replaced the old counter printers that were a major cause of frustration for branches because they were slow and noisy. We are also taking the opportunity to address many other issues and problems e.g. unnecessary receipts. Wherever possible, within the constraints of cost and time, the issues and problems that have been highlighted will be addressed.

will look & feel very different to the existing Horizon

Horizon is over 10 years old and the design criteria/technology was different at the time it was developed. One of the aims of the Programme is to bring the Horizon User Interface (how the system will look on screen) up to current industry standards.

but will not radically change transaction processes

will replace the existing SmartPost application

SmartPost is being replaced. Its replacement, Postal Services, is being designed so that, as with other products and transactions on Horizon Online™, there are fewer screens to navigate. Based on information gathered from the customer, a counter clerk will be able to set all the criteria for posting a mail item on the first Postal Services screen i.e. weight, destination,

delivery preferences, format and other options.

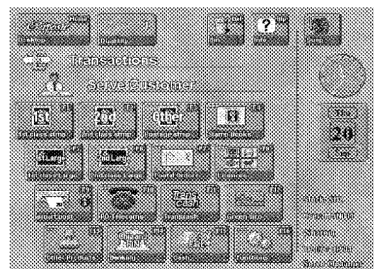
will not mean the replacement of current keyboards, monitors and processors

Apart from the recently completed installation of new counter printers, the only other additional new piece of equipment is the new communication router. We aim to keep any impact on branches to a minimum.

Horizon – Current State



- 13 year old design and technology to satisfy a different business
- Slow and expensive to use
- Evolved rather than designed – a consequence of which is a robust service but complicated to change



CURRENT STATE

Before discussing the future development of Horizon, let's remind ourselves of the 'system' we have today

OVERVIEW

Horizon is 13 years old and the design criteria/technology was different and the business needs were different – the demand for on-line working was low, the telecoms were expensive for on-line. Horizon was built to support off-line trading.

Very high security (e.g., user ID / access / screens encryption) this was a requirement from Gov because Horizon was built to support benefits payments.

Horizon is the 2nd most secure system in Europe. The MOD being #1!

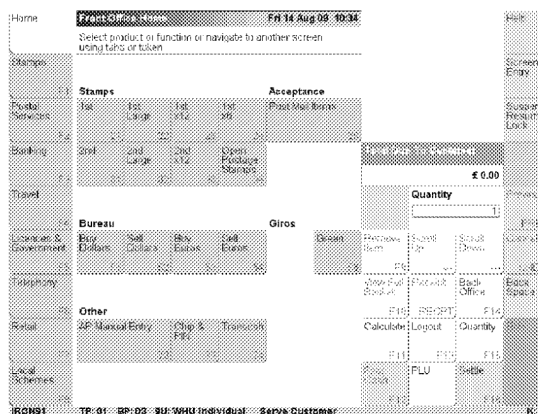
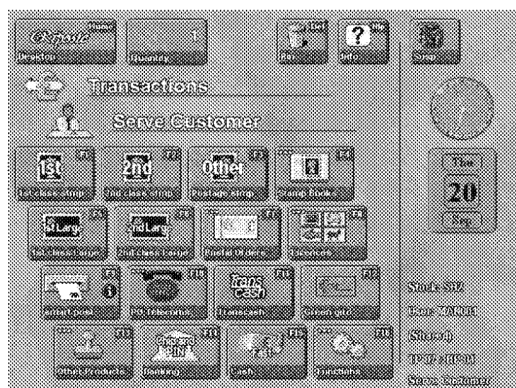
Horizon is a costly system. For example Horizon is a bespoke system that uses a different encryption. Link for instance is unable to decrypt the encryption we have, so we have to decrypt before sending!

Horizon is also a system that is wrapped up in 'barbed wire' – making changes difficult and costly – test everything!

As time has passed and more product have been developed Horizon has evolved – from a technical perspective essentially we have bolted things on the side – we undo the barbed wire stick a bit in then wrap everything back up.

Design was optimised at the time to minimise costs (esp. network) - offline working

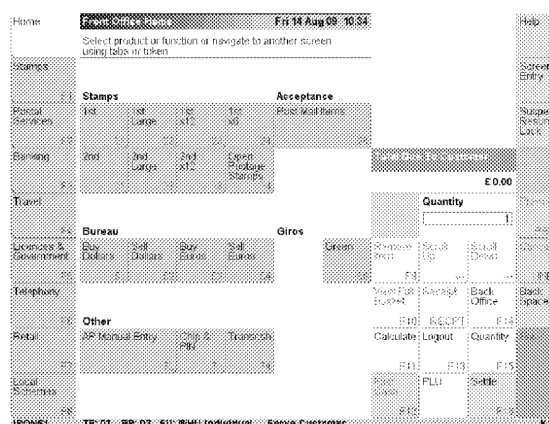
Horizon to Horizon online



Horizon Online – Future State



- A permanent online connection
- Modern mainstream technologies with lower cost of ownership and easier integration with external systems
- No end of day polling
- No transfer of data in branch
- Online settlement model
- Easier and quicker to change



Post Office® [DateTime]

11

Thinking back to the previous slide - clearly current state does not support the business drivers so how will future system meet these needs?

Features of the future state include:

Centralised systems and data management reducing service costs software / reference data centralised – branch's receive updates automatically when on line.

A permanent on-line connection becomes more important in the new world (nb. Permanent on-line is in relation to data transmission – data will be committed to the data centre, not stored locally)

Component based for greater re-use and speedier development less to manage , easier to reconcile data flows and make changes Gone is the bespoke build of today, when we build the future the barbed wire will be removed

Modular, to simplify testing and new deployments reduced complexity – easier / quicker to diagnose problems

Modern mainstream technologies with lower cost of ownership and easier integration with external systems (e.g. the LINK encryption issue)

A new contract with Fujitsu Services – Pay FS less but they get a share of the cost saving we make - it is in their interest to make savings as they will earn more.

Change in Architecture – currently all transaction data via the gateway Transaction data held at counters as well as data centres

Under HNG

Gateway becomes a standard counter

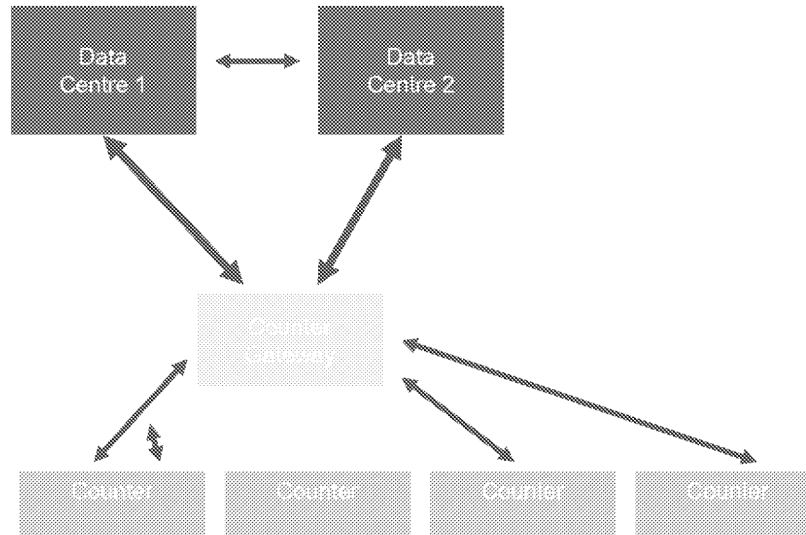
All counters communicate via the new router

No transaction data held at the counter

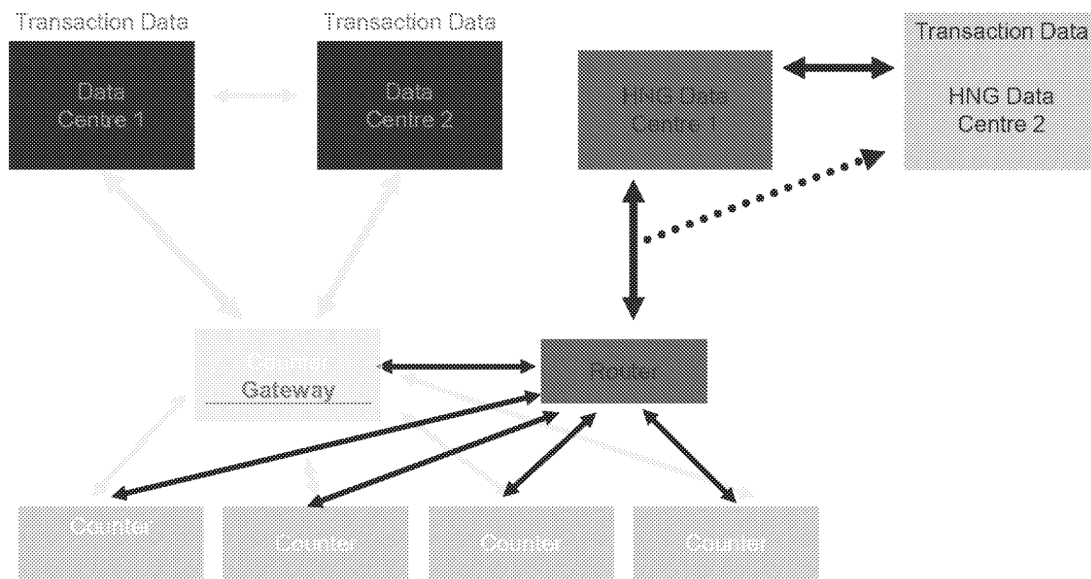
Live and 'warm' (secondary, ready to 'step in') data centres – rather than 2 live

Comms direct to data centre 2 on failure of data centre 1

Current Architecture



Future Architecture



Business Equivalence



- The primary design principle for Horizon Online
- Horizon Online™ will support the same products and deliver the same financial and operational outcomes as Horizon
 - but how this is achieved may change
- Horizon Online will not be exactly the same as Horizon in every detail
- Horizon Online will not deliver any new functionality in the first release

What is does is the same – How it does it is different

E.g. An AP transaction will be invoked using the same token, but under the bonnet the system will be completely different

This is not about introducing new functionality (new system will be “Business Equivalent”)

Although

where practicable, and at acceptable cost, rough edges will be smoothed

Anything else may be possible but via Change Request

Already held 3 workshops to identify rough edges. Further work being done to analyse outputs to identify ‘quick wins’

Service & Performance



- Overall availability of service will improve
- No Network connection = No service
- Counter printers have been replaced already
- Back up Network – Branch router will have both an orange and Vodaphone sim card which will automatically connect if primary comms are down.

Service & Performance:

Overall availability of service will improve – available more often & fails less but worth noting that HNG will not make existing issues with links to external systems go-away

Backup network in place (builds on Network Resilience Programme) via router (vodaphone/orange) where signal strength is available

Gateway PC no longer single point of failure (new router installed) – currently the conduit to the external network

Revised SLAs to better reflect our operating needs

Re-defined Engineering Service SLAs – significant cost savings

No Network connection = No service

All transactions posted and settled on-line in real time

Back office functions also reliant on Network connection

Key Impacts on Users



Horizon Online

- is NOT about new functionality – it is based on the principle of “Business Equivalence”
 - but will introduce a new User Interface (look and feel)
- supports the same products and deliver the same financial and operational outcomes as Horizon
- will integrate the existing SmartPost application
- will introduce improved Help facilities
- will introduce some other ‘minor’ changes
- no replacement of the existing keyboards, monitors or processors
- introduces a new branch communications router in each branch
 - Key point: No network connection = No service
- will mean CTOs use the live system

New User Interface

Bubble help is going – SmartHelp type functionality across the system – known as Online Help – will replace majority of Counter Operations Manuals

No new counter kit in the branches – “Retail model”....sweating the assets

new counter printer already installed

new communications router to be installed


Programme and system will be referred to as ‘Horizon Online™’ in communications to front line colleagues – “Says what it does on the tin”

New counter printer – has been a great success

Installation of a new Network Communications Router

installed in advance of software drop of Horizon Online™

Changes and Exclusions



Changes	Exclusions
<ul style="list-style-type: none">• Reports• Recovery• Receipts• Sessions settlement• Counter Training Office• Session suspend• Counter Operations Manuals	<ul style="list-style-type: none">• Withdrawal of PMMC Card• Watercard• Session transfer• Bubble help• Quantum

Post Office® [DateTime]

17

Changes

Report Simplification – report consolidation/house keeping exercise. A revised counter sequence will be designed to enable the user to work through the design set, printing and cutting-off as appropriate. Likely that the Counter Daily & Counter Weekly will be removed.

Recovery – Still being worked up what this looks like. Brought about due to the changes in session settlement. i.e. potentially fewer recoveries due to the on-line data transmission.

Receipting – receipts are being reviewed and the layout and point that the receipts are printed may change. Details still being drawn up.

Session Settlement – session settlement will only occur once the data has been transmitted and received at the data centre and not before. On-line transactions e.g., DVLA and APOP will operate as now for on-line verification.

CTO Training – completely different. Will now be an on-line solution that will replicate the live service. Responses will be emulated from the data centre.

Session Transfer & Suspend - functionality removed. This is the ability to transfer a customer session from one terminal to another and not transfers between stock units.

POLO Card – was used to re-boot system after downtime, but with Horizon On Line all password prompts are online

Exclusions

PMMC Card to be withdrawn as no longer required under Horizon

Help – removal of bubble help and introduction of context sensitive help across the application –Current SmartHelp functionality across the system replaced by Online Help – navigated using index pages or search facility – context sensitive help within transactions and procedures i.e. taken straight to relevant information

Preparing for Horizon Online™



Comprehensive supporting communications with each branch receiving a Horizon Online™ Introductory Booklet/Planner and Pack

New Branch Router installed

Migration date communicated to every branch via letter

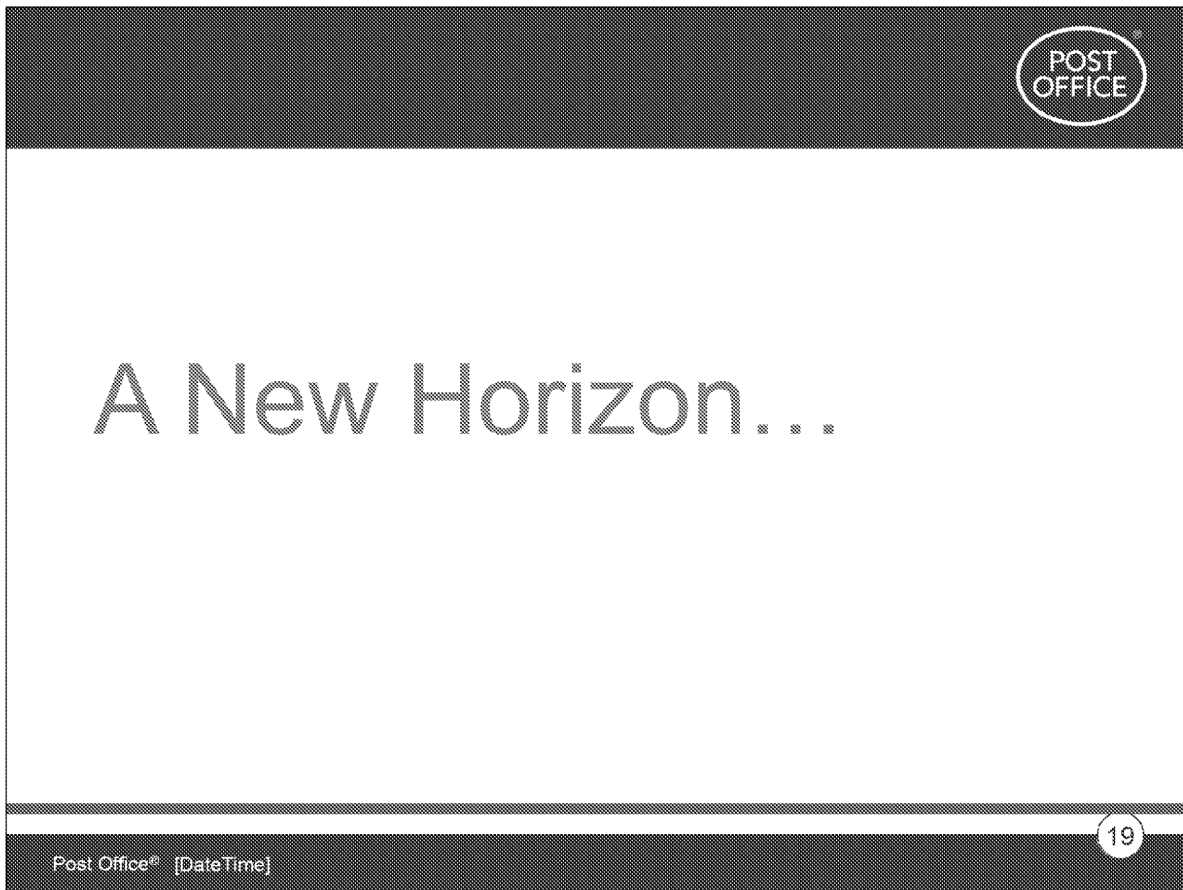
Branch completes pre migration checklist

Distance Learning Training completed and test taken on Horizon

Software distributed prior to Migration

Fujitsu and Property Projects will complete Health Checks on branches prior to migration (4 weeks, 1 week and day before)

Some pre-work, AP transaction recovery, Acceptance of Transfers
Schedule of branches driven by Post Office Ltd, nationwide rollout



Show video or check they all have a copy (will be part of the migration pack).

Branch Migration



DAY OF MIGRATION

Migration support attends to provide Horizon Online training and support the migration activity

Branch closes to public by 17:30

Migration must have been pressed by 18:30

Balance or stock check is not required

On-screen 'wizard' to progress migration

Final Horizon position report printed

Migration process continues over night

Branch Migration.



DAY 1 OF HORIZON ONLINE

Migration Support attends to support post migration activity and guidance on UI navigation

Log on and follow on-screen 'wizard' to produce Horizon Online™ opening position report

Check reports tally

Touch the button to complete migration

Set up initial password for users

Horizon Online™ - Training



Available for all Horizon Users

Developed with significant user involvement

A variety of training materials

Demo module to provide hands on experience in training

Training to be completed before migration

Distance learning completed/monitored via AP ADC on Horizon

Migration support in every branch on the day of migration & day 1 of Horizon Online

The scale of the task:

Up to 60,000 Horizon Users (frontline, BDMs, Support functions Head Office Staff etc)

Every branch across the UK

A real mix of users

A something for everyone approach - e-learning, DVD, distance learning workbooks/ quick reference guides and face to face events

All training products have been thoroughly user tested

All training products will be assessed in the early stages of the pilot and amended accordingly if required

Completion of distance learning will be confirmed on Horizon

The programme will manage an issues and escalation process.

Training approach:


To ensure branch is ready to migrate and the migration process is initiated.

Will deliver training during the afternoon of migration.

Attends the branch the following day up to about mid to late morning - to help complete migration process.

Will be on hand for any queries/ questions and to provide some further training on back office procedures

Training focus...



<h2>UI Structure & navigation</h2> <ul style="list-style-type: none">• Keyboard navigation• Logging on and off• User and stock unit administration• Stock sales e.g. postage• Mails• Travel<ul style="list-style-type: none">Bureau de Change and Travel Insurance• Telephony• Banking<ul style="list-style-type: none">Bill payment and financial products• Daily accounting• Weekly accounting	<h2>Other changes</h2> <ul style="list-style-type: none">• Online help• Reports• Receipts• Fallback & recovery• Session suspend• Session transfer• New settlement model <hr/> <h2>In-branch migration activity</h2> <ul style="list-style-type: none">• General house keeping• Preparation• Press the button• Migration wizard• Horizon Online – day one
---	--

Post Office® [DateTime]

23

Proposed outline of what we will train users on.

Implications of getting it wrong:

Reluctance of branches to migrate
Reduced operational efficiency
Reduced customer service
Negative impact on sales
Impact on live service, e.g. Help desk
Impact on PO Ltd credibility
Impact on costs for remedial actions

Communications Timeline 1



Time	Activity
- Advance Notification to every branch	Internal Comms - Advance Notification Letters sent to each branch in early November
- 7 weeks	PROG – Issue Schedule and Internal Comms Team prepare Migration Confirmation Letters
- 6 weeks	Internal Comms Team send Migration Confirmation Letter (c1375 branches per week)
- 5 weeks	NBSC call scheduled branches re Migration Confirmation Letter (c1375 branches per week)
- 5 weeks (Friday)	PROG – send out an agreed schedule for that week to the business stakeholders & Fujitsu
- 4 weeks	PROG – Fujitsu ensure software is downloaded to branches scheduled before migration
- 4 weeks	SWINDON – Send out pack to branches as per schedule - managed by programme (c1375 a week)
- 3 weeks	NBSC - call branches re: confirm HOL pack arrived, Router installed/ Date planned, remind them of training, (c1375 branches per week)

Specific communications (outside of the regular updates, use of Subspace etc.)

Advance Notification Letter likely to be sent with launch booklet to go to every branch except the first 14 Pilot branches

Early notification allows branches to make plans

Regular contact by letter or phone with branch from 6 weeks before migration

Letter will encourage branches to complete distance learning as early as possible; to have attempted AP/ADC test on Horizon 2 weeks before migration date

Communications Timeline 2



Time	Activity
- 2 weeks	PROG –inform Ref Data team of schedule to enliven Migration button
- 1 week	NBSC - call branches (by exception–assumed 30%-350 per week) to remind them of training and pre-migration activity
- 1 week	TRAINING –migration support call branches to confirm support (c275 calls per day)
- 0 day	TRAINING –migration support arrive at branch pm and supports Branch Migration (c275 branches per day)
+1 Day	TRAINING –Horizon Online go live; Migration Support attends to support branch for morning (c275 branches per day)
+2 Day	NBSC – Provide live support to branches if required as per BAU process

To Summarise...



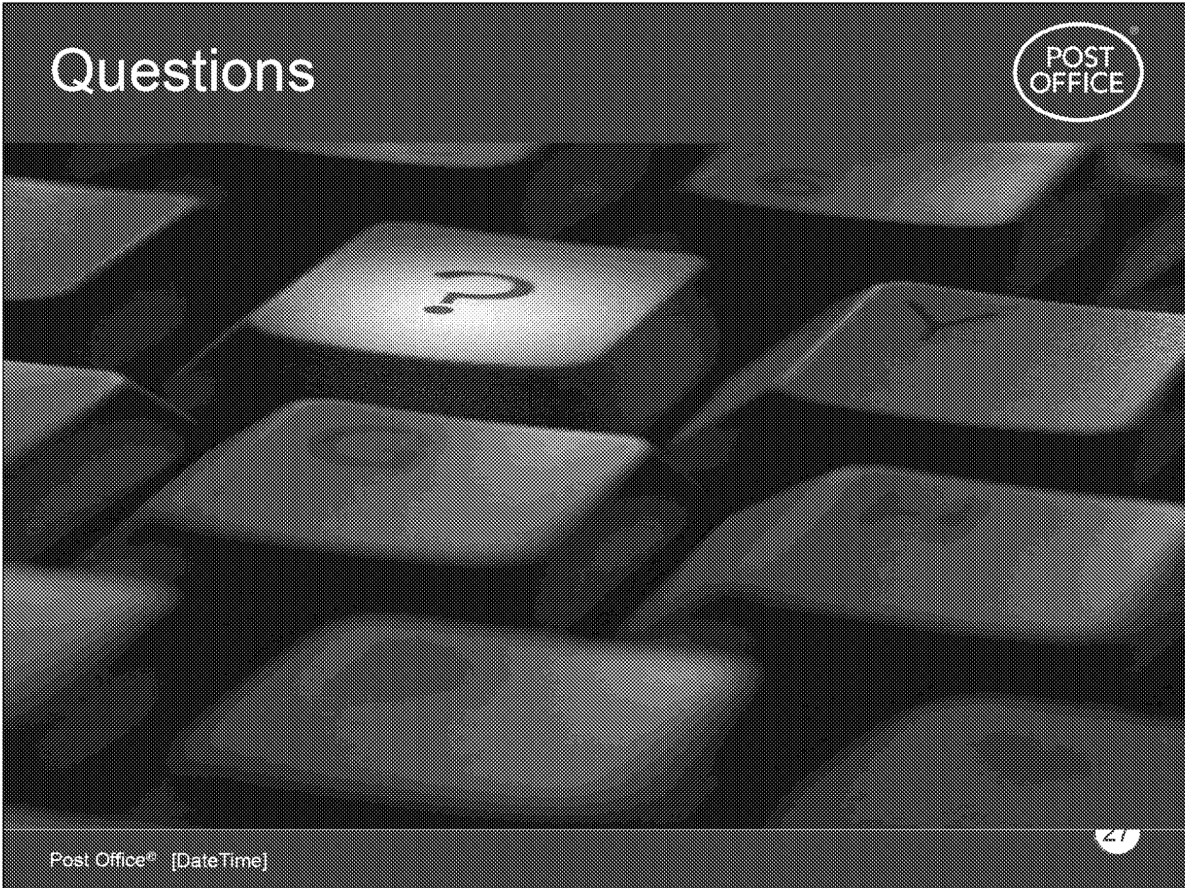
HNG will deliver Horizon Online™ and has been designed to:

- Reduce costs
- Provide improved service resilience

It will....

- Look and feel very different to Horizon
- Not radically change transaction processes
- Deliver an online centralised system
- Built to run on existing kit in branches
- Deliver a new User Interface
- Be known as 'Horizon Online™'
- There will be no new kit

Questions





Contents



- Hours
- Travel & Subsistence
- Line management
- Dress Code
- Behaviours
- Scheduling

Contents (Continued)



- Absence reporting
- Pre Migration contact
- Issue management
- Security/Health & Safety
- Feedback

Questions





A day in the life.....

Post Office®



Introductions



Support for Subpostmasters/officer in charge

Day 1

Outline of the days –

- Confirm purpose of Support attendance.
- Explain how the afternoon will run.
- Identify any immediate concerns/ questions around the new system.
- Confirm staff will be released for hands on training.
- Confirm that staff have completed training materials

Migration process



Overview

- Confirm the migration button is available.
- Ensure all Migration Checklist activities have been completed
- Re-emphasise the need to press the button by 18:30
- Run through migration instructions / demo laptop
- Explain Password rules
- Explain use of **delegate manager** if required

Screen Overview



Front & back office Demonstrations

To provide hands on experience of the new system & to re-emphasise the key changes likely to impact User performance.

- Limited functionality - explain the limitations of the Demo system.
- Explain the key changes in system navigation & use

Re-emphasise key changes

- Reports, Quantity function, Tabbing vs Enter, Settle, Postcode & House Number only,
- Use of Cancel – rather than Home
- Previous button – to retrace & navigate
- Reversals.

Screen Overview



Additionally for Subpostmaster/officer in charge cover the following;

- Setting up users & stock units,
- Passwords,
- Suspense account
- Deleting users
- Dealing with losses and gains

At close of business



End of day processing

- Ensure all activities are completed promptly.
- Ensure that branch is ready to press the button by 18:30 at the very latest
- Support the Mgr in completing a Cash declaration
- Suspense account
- Sales Report

Commence migration process



- Ensure that the Migration process is started in time.
- Ensure Closing position report is produced and stored securely
- Ensure Manager (or delegate mgr) initial password for HOL is recorded and kept safely
- Ensure that all kit remains connected and the Processor unit is left switched on
- Confirm when OK to leave & go home

Complete the migration process



Day 2

Support the Manager in completing Migration to progress to Horizon Online

- Manager to Log-On to Horizon Online & complete migration.
- If Migration has failed – call NBSC to report failure immediately
- Adjust monitor as necessary
- Ensure Opening position report is produced
- Compare reports and ensure Mgr signs the report as no differences.
- Where there is a difference – call NBSC to report this immediately
- Ensure initial passwords are set up for the for team
- Provide live support to Users

In branch event



Both days.....

Compliance & Conformance

In branch event



- Cash holding
- Excessive stock holding
- Security
- Mails Integrity
- Mails Segregation
- Ensure cheques are cleared
- Travel Insurance transactions
- Use of PiP template

Details to follow.....

Questions





Training Materials & contents of the migration pack

Post Office®



Training materials



- Workbooks
- CD – ROM
- E-learning site
- Quick reference guides
- DVD
- Wall chart

The box.....



Arrival time in branch – Three to four weeks prior to migration

Contents of the box

- Workbooks
- Quick reference guides
- CD Rom
- Migration check list
- Migration instructions
- Special notices

Questions

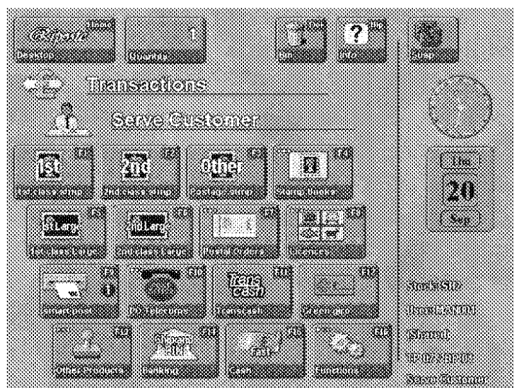




The migration process



Horizon to Horizon Online™

[illegible]

Migration pre-work



Branches will receive a migration tick list. This will instruct them to:

- Delete any stock units that are no longer required
- Delete any users that are no longer required
- Produce a list of initial Horizon Online Passwords
- Ensure all memo broadcast messages are read
- Ensure that any outstanding AP/ banking recoveries are completed

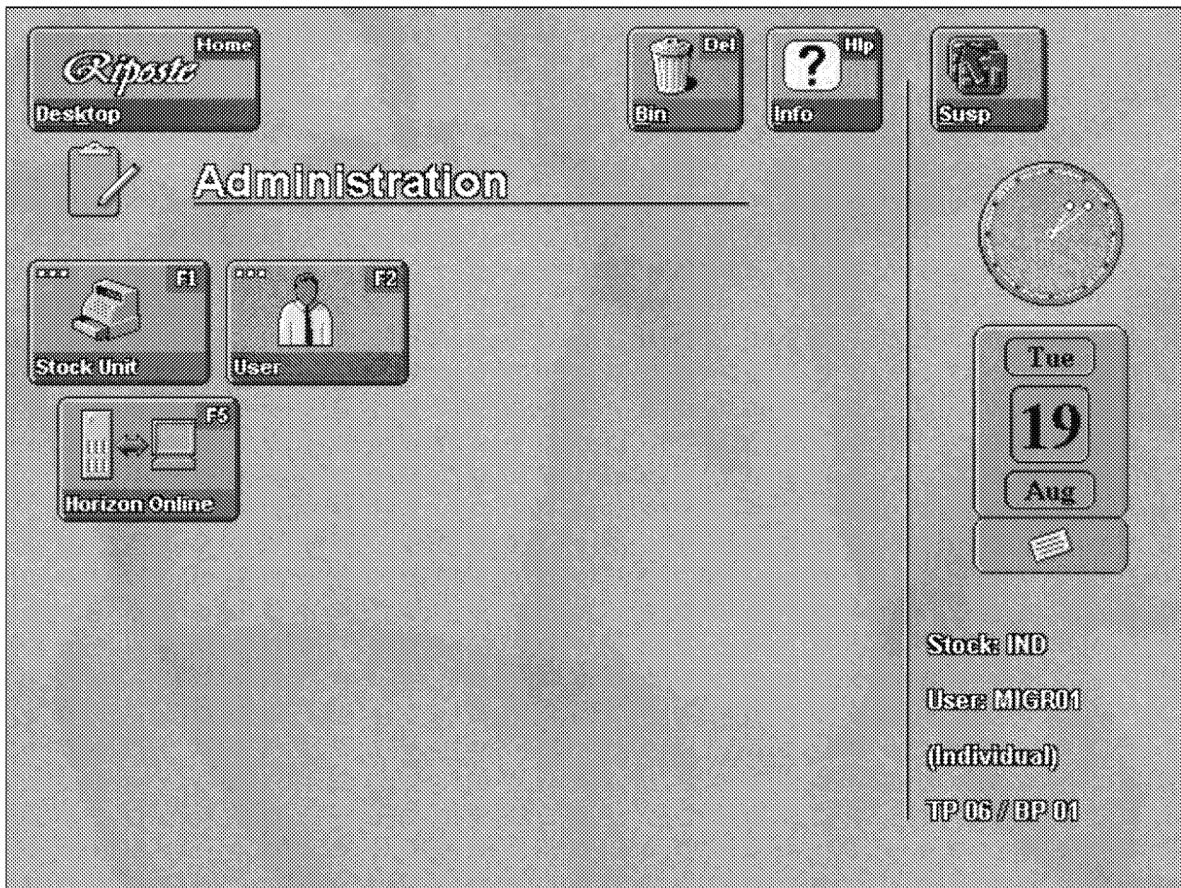
The day of migration

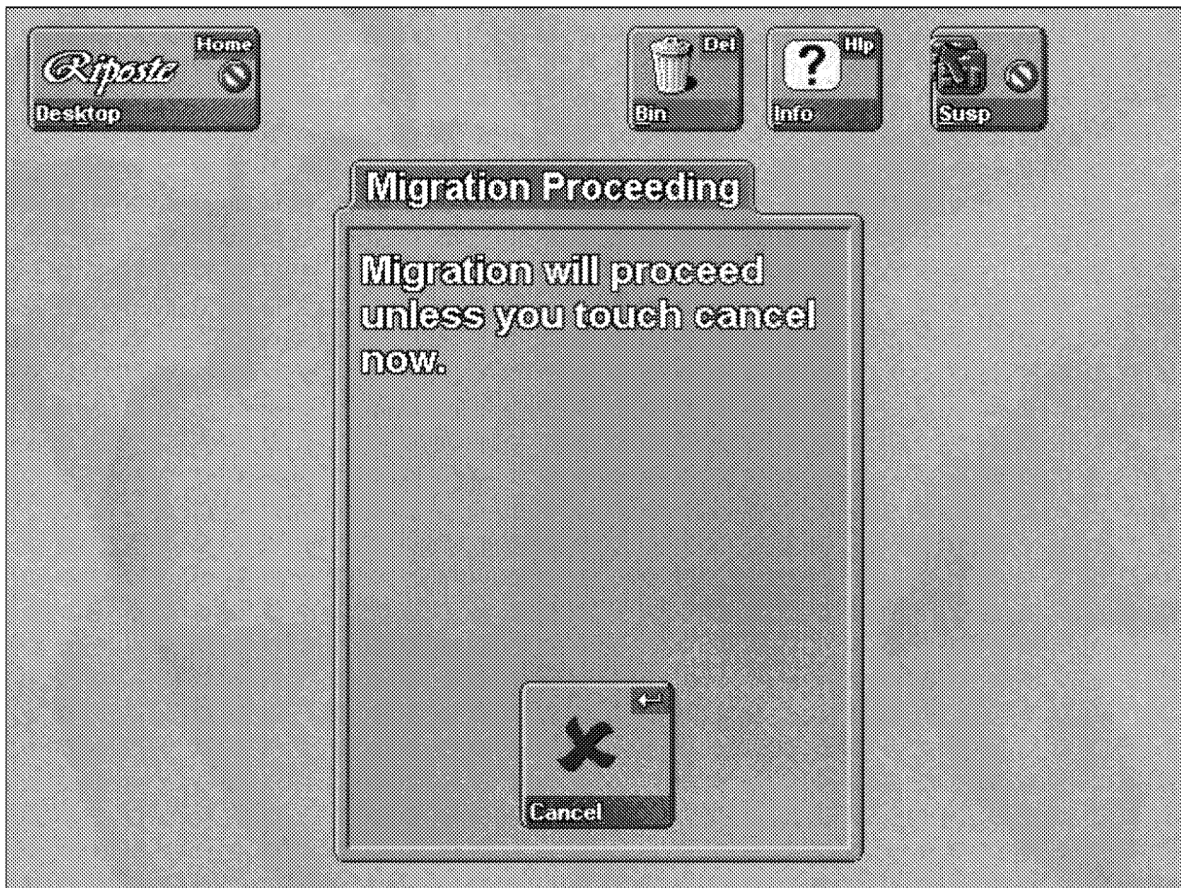


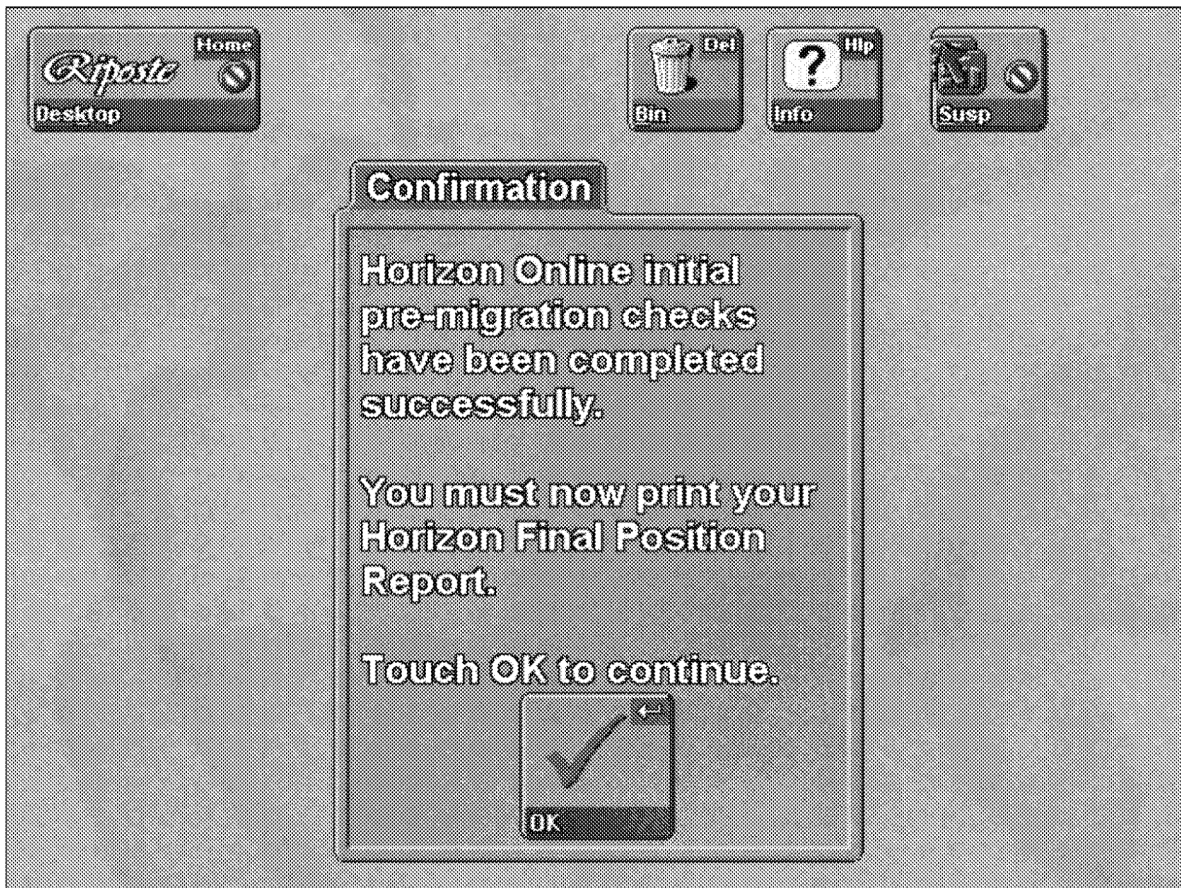
The branch manager will need to ensure the following:

- The migration button has been enabled on the morning of the migration
- Someone with Manager access stays up to 1 hour later than normal to initiate the process
- The mails despatch is cut off and there are no outstanding items not shown on the report.
- All counters within the branch are connected to the WAN and are on-line
- There are no suspended transactions
- The printer at the counter on which the process will be launched is working
- The Branch ceases trading by 17:30 at the latest
- Normal end of day procedures are completed
- All other users are logged out
- The migration button is pressed as soon as possible after closing time, but by 18:30 at the latest.

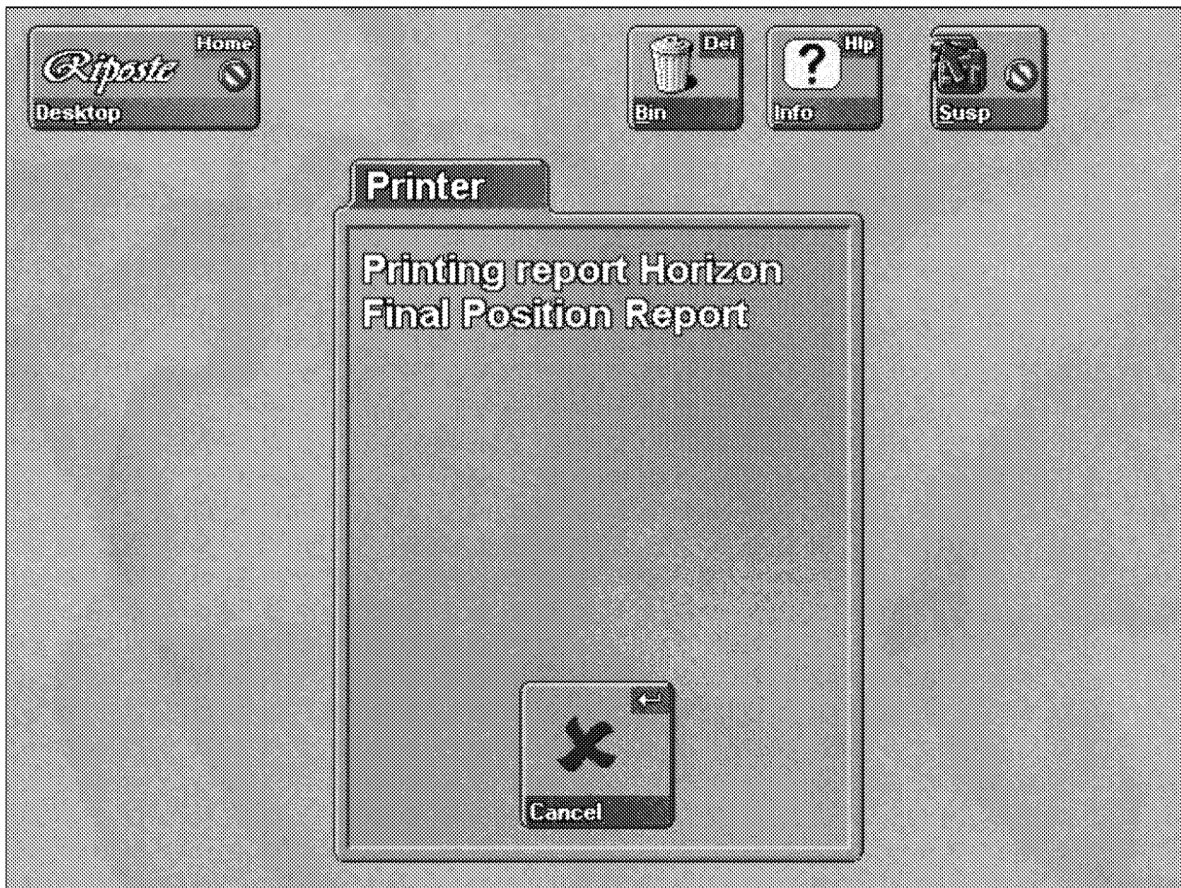
N.B. The migration button is locked for users that do not have Manager access.

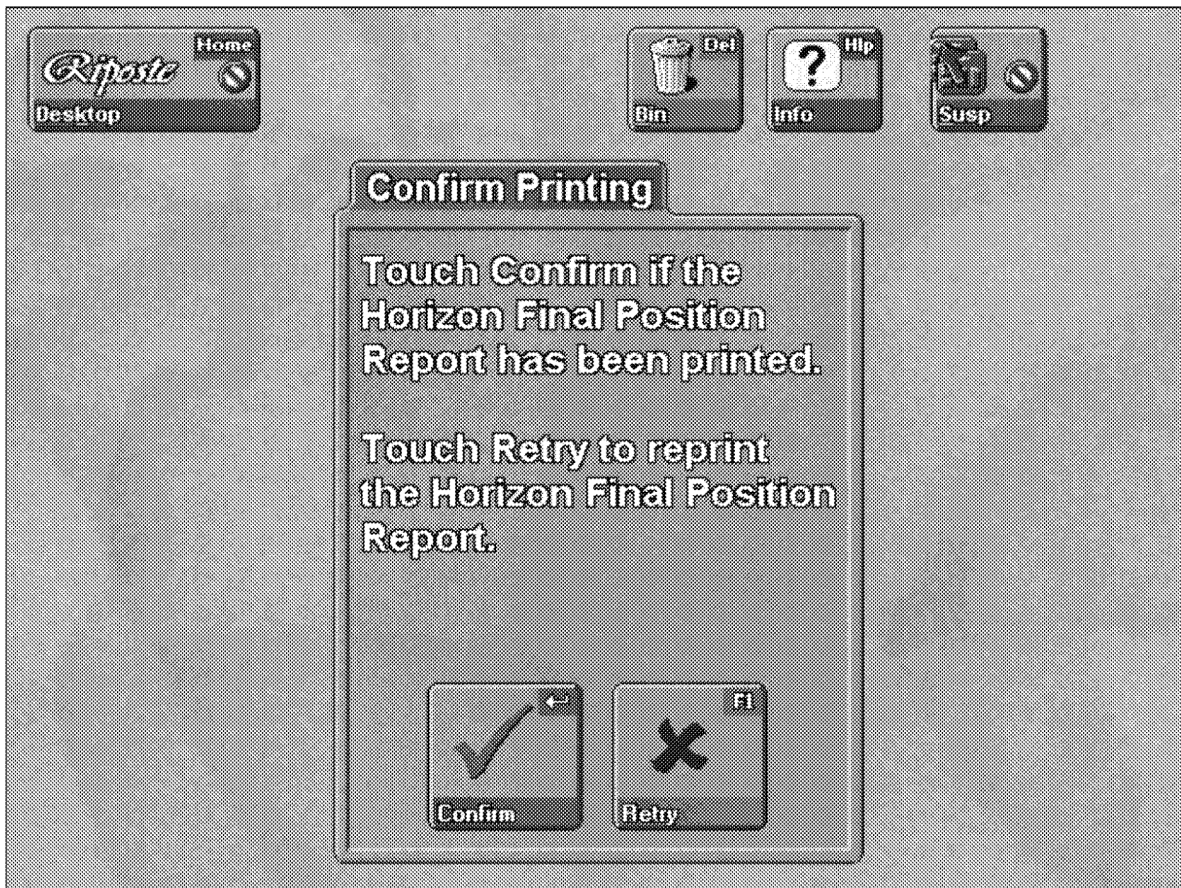












Home

Riposte

Desktop

Esc

Prev

Del

Bin

Help

Info

Susp

Susp

Enter Password

Touch to accept the value entered.

✓

Alphanumeric Keypad

Horizon Online Password

→ You must now set your password for Horizon Online login

● Re-enter Password

Home

Riposte

Desktop

Esc

Prev

Del

Bin

Help

Info

Susp

Susp

Re-enter Password

Touch to accept the value entered.

✓

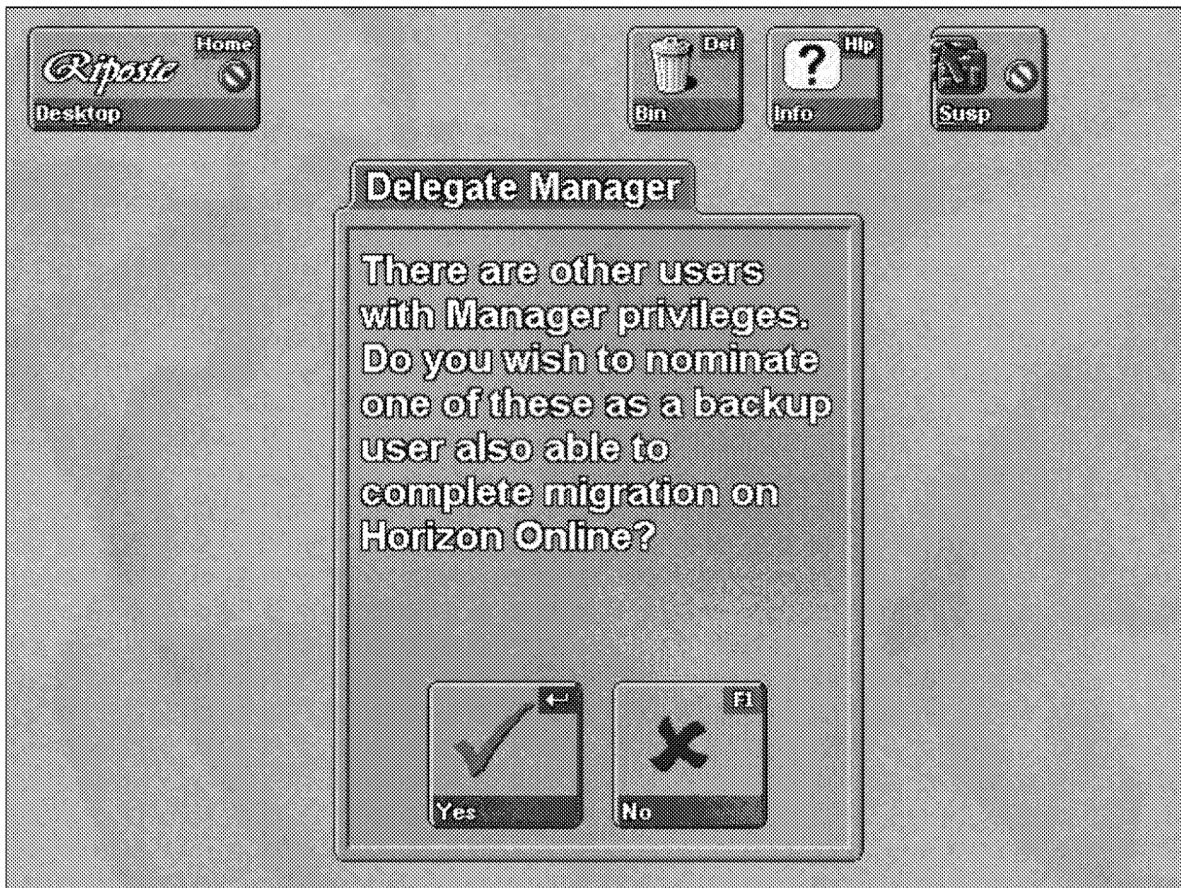
Alphanumeric Keypad

Horizon Online Password

✓ You must now set your password for Horizon Online login

XXXXXXXX

→ Re-enter Password





Home

Riposte

Desktop

Esc

Prev

Del

Bin

Help

Info

Susp

Susp

Enter Password

Touch to accept the value entered.

✓

Alphanumeric Keypad

Horizon Online Password

→ You must now set the Horizon Online password for your delegate manager

● Re-enter Password

Repaste

Home

Desktop

Esc

Prev

Del

Bin

Help

Info

Susp

Susp

Re-enter Password

Touch to accept the value entered.

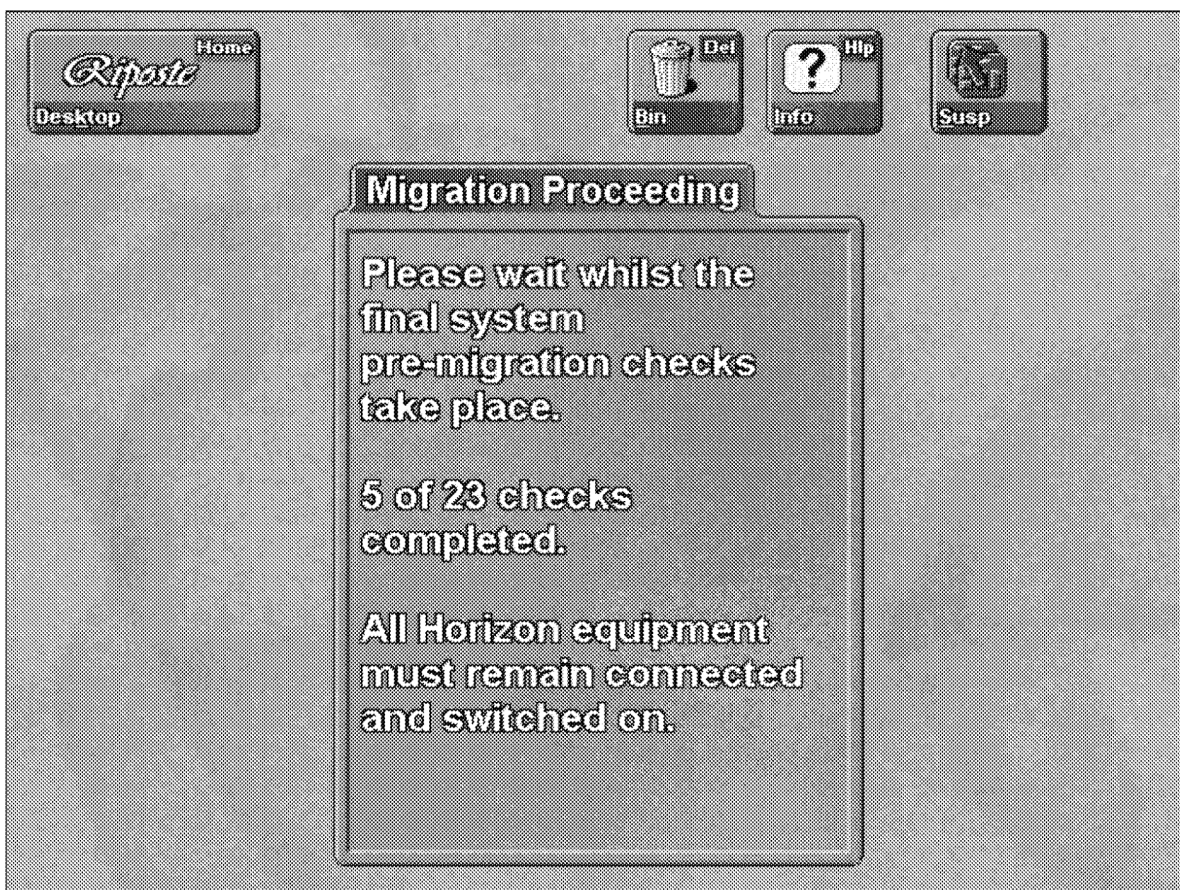
Alphanumeric Keypad

Horizon Online Password

✓ You must now set the Horizon Online password for your delegate manager

XXXXXXXX

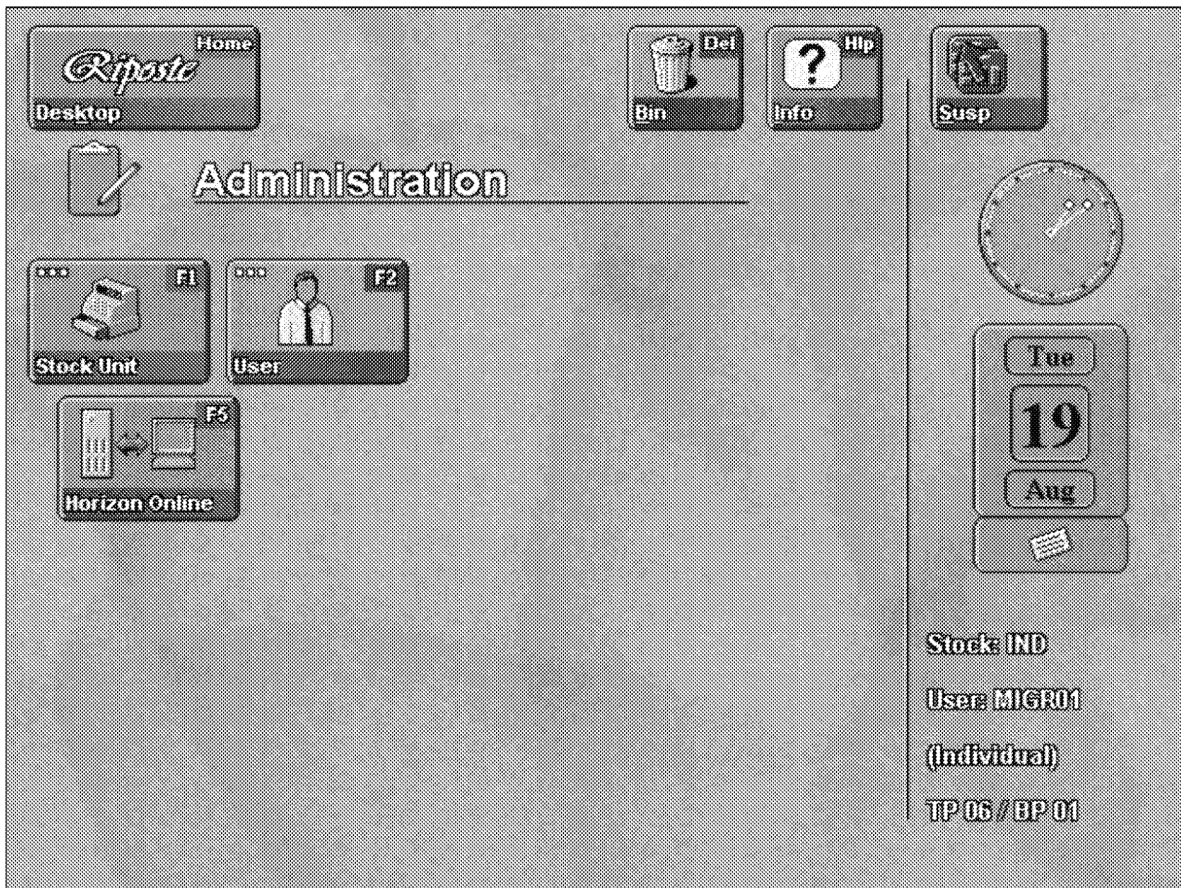
→ Re-enter Password

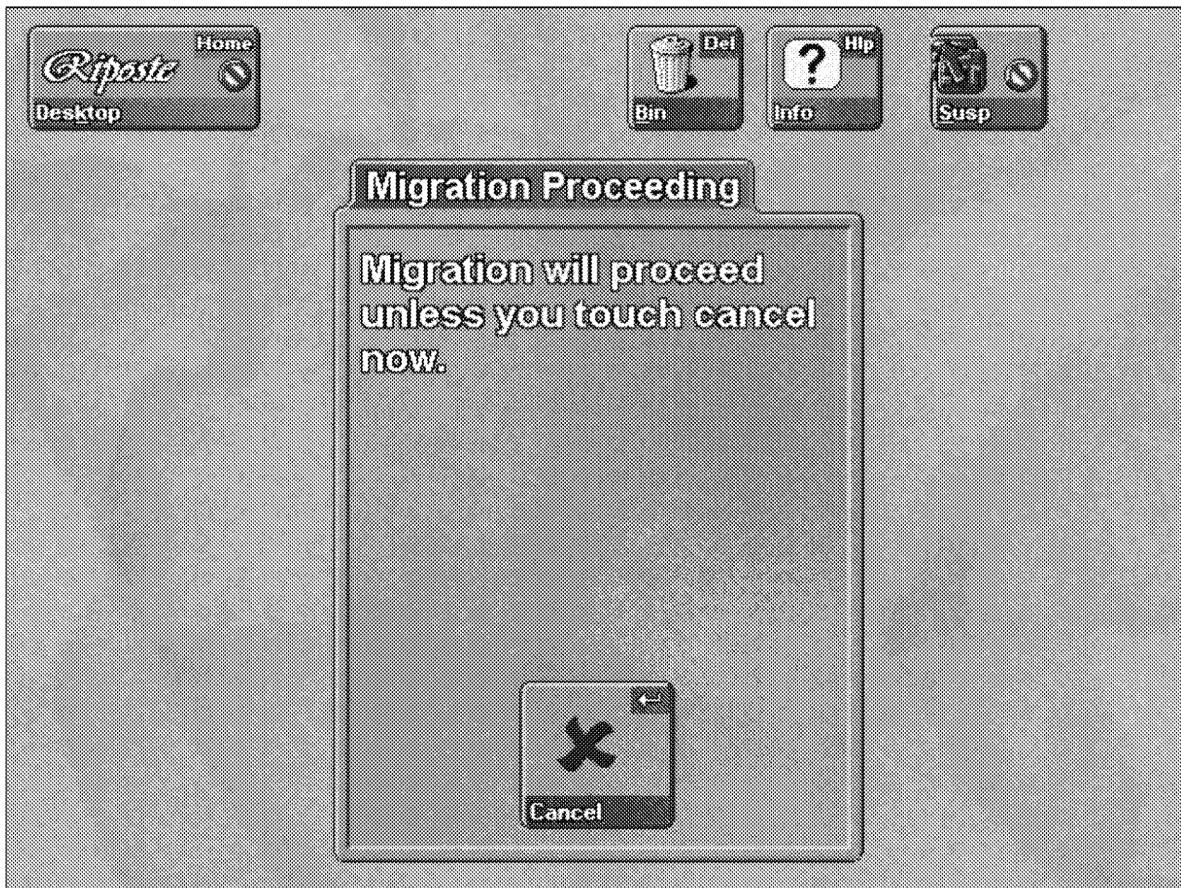




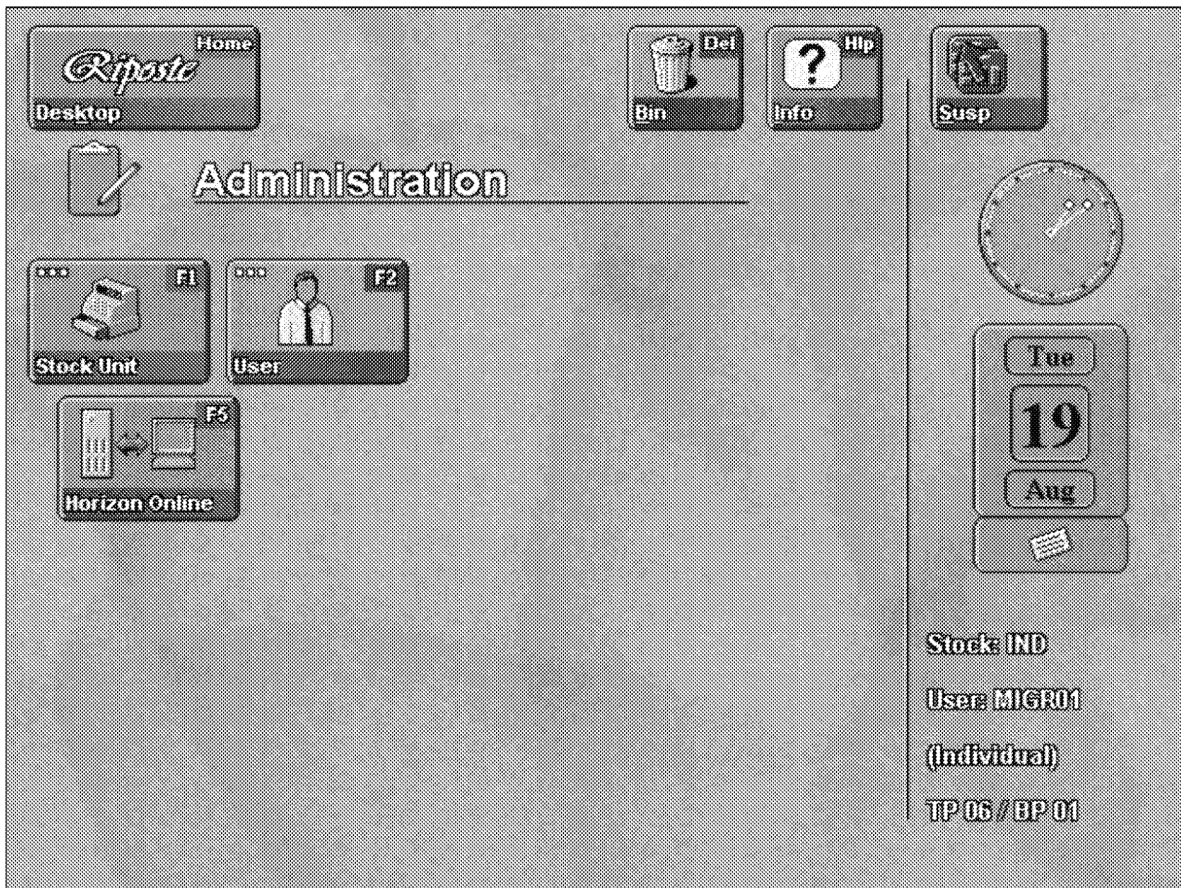
It can be cancelled though

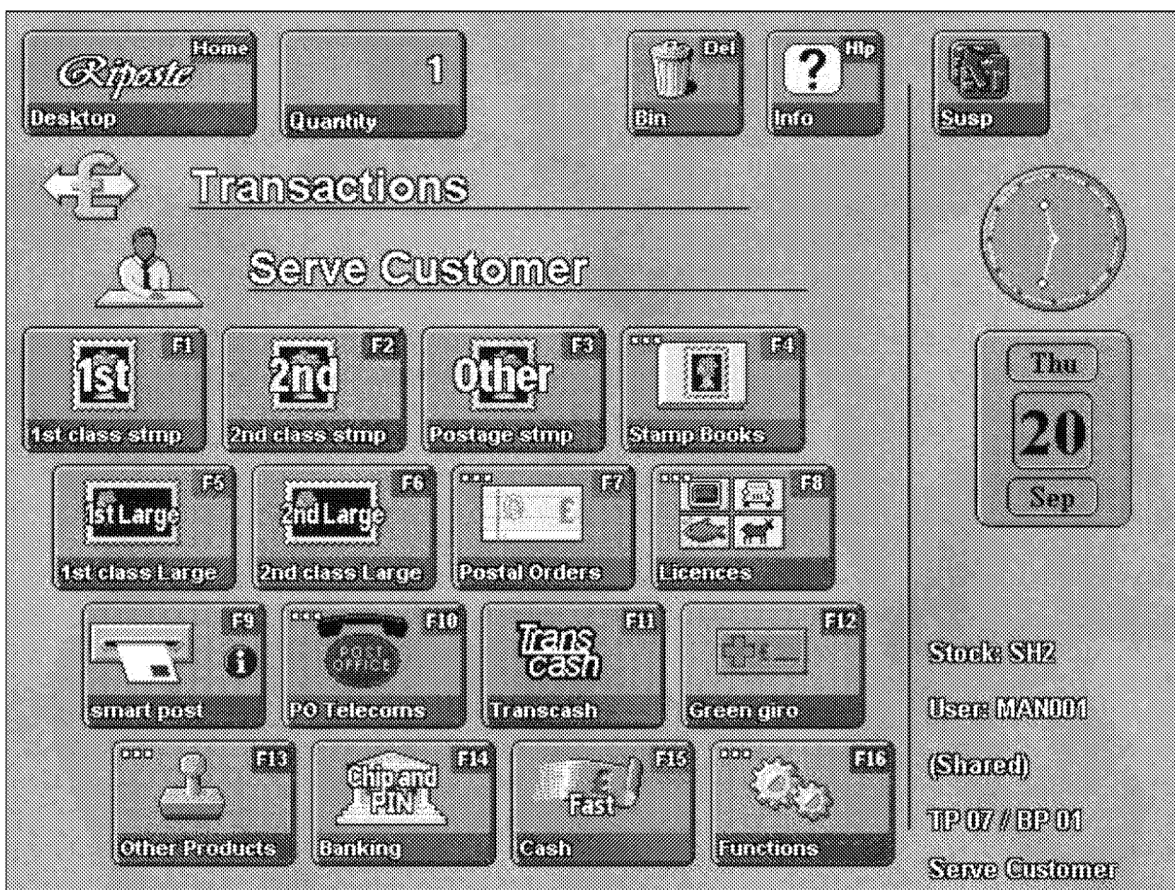






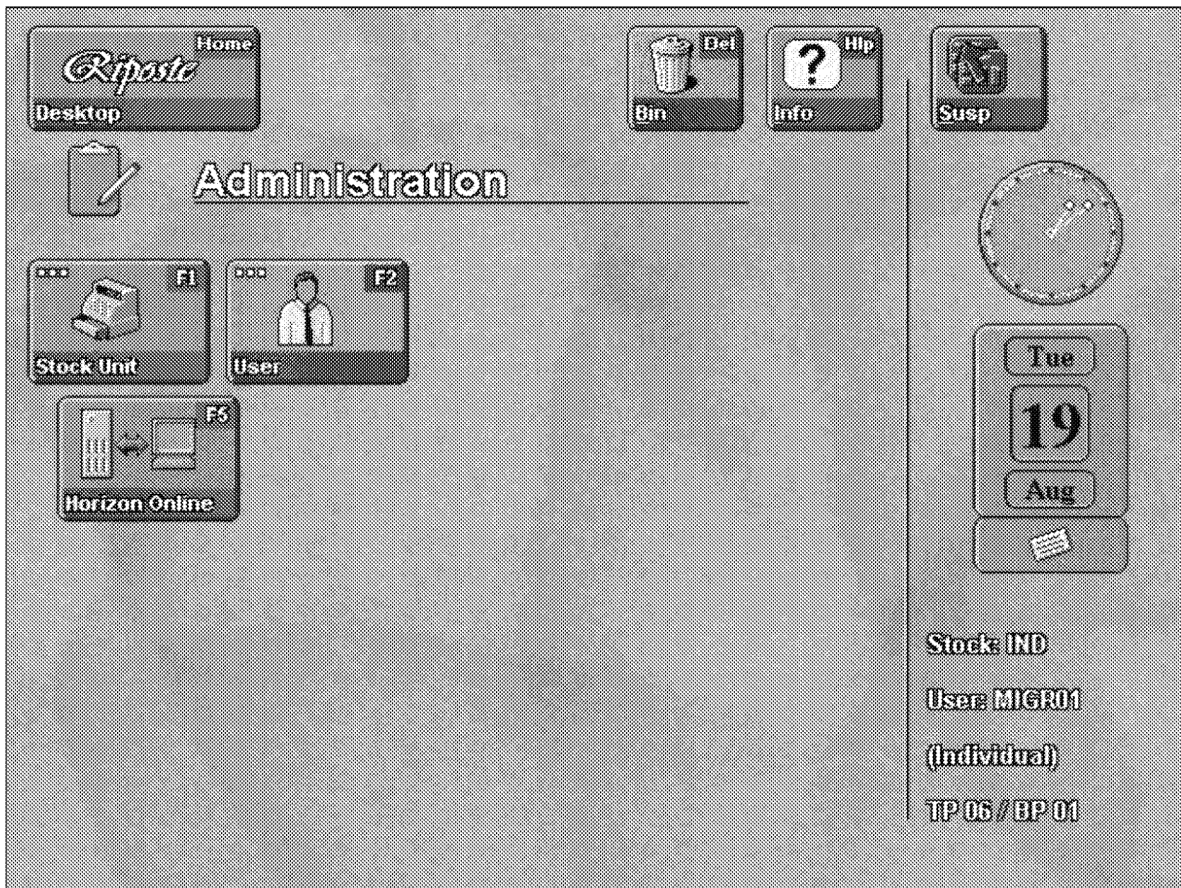




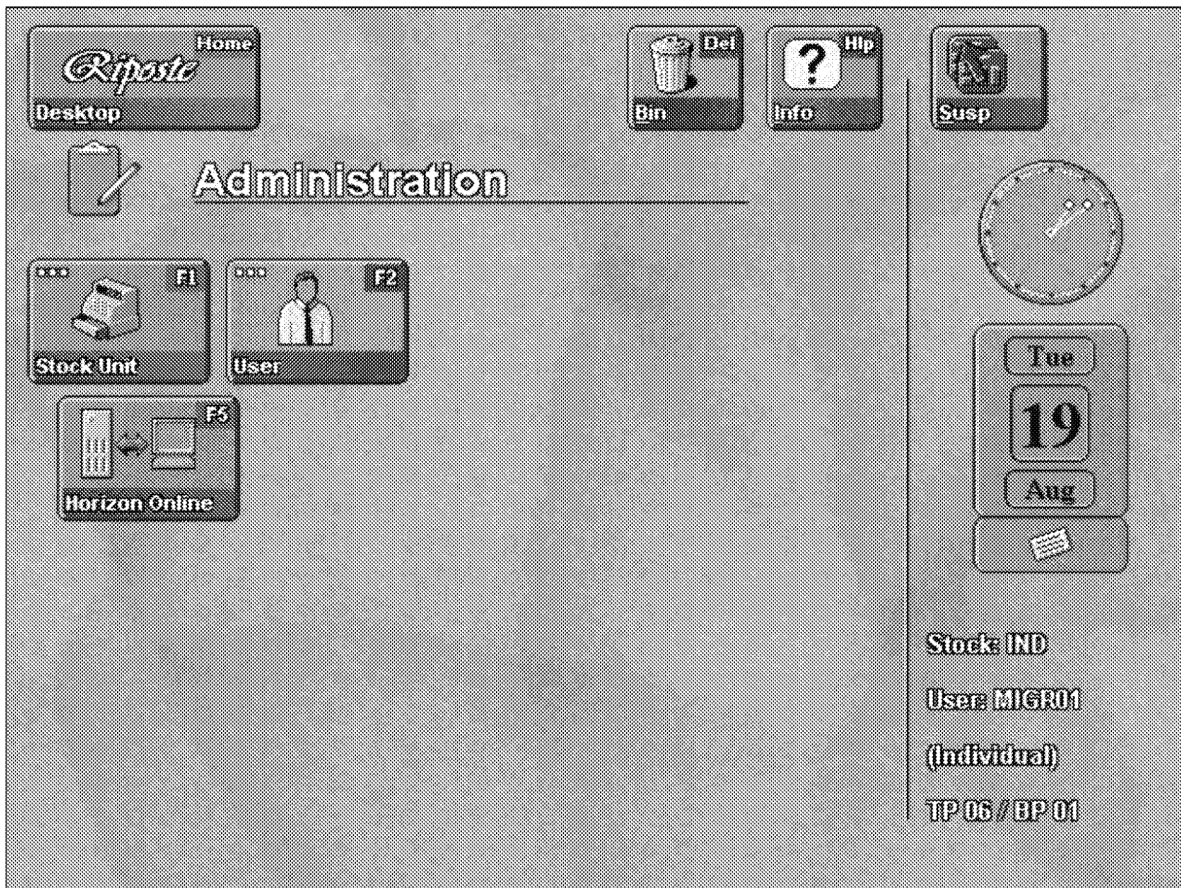


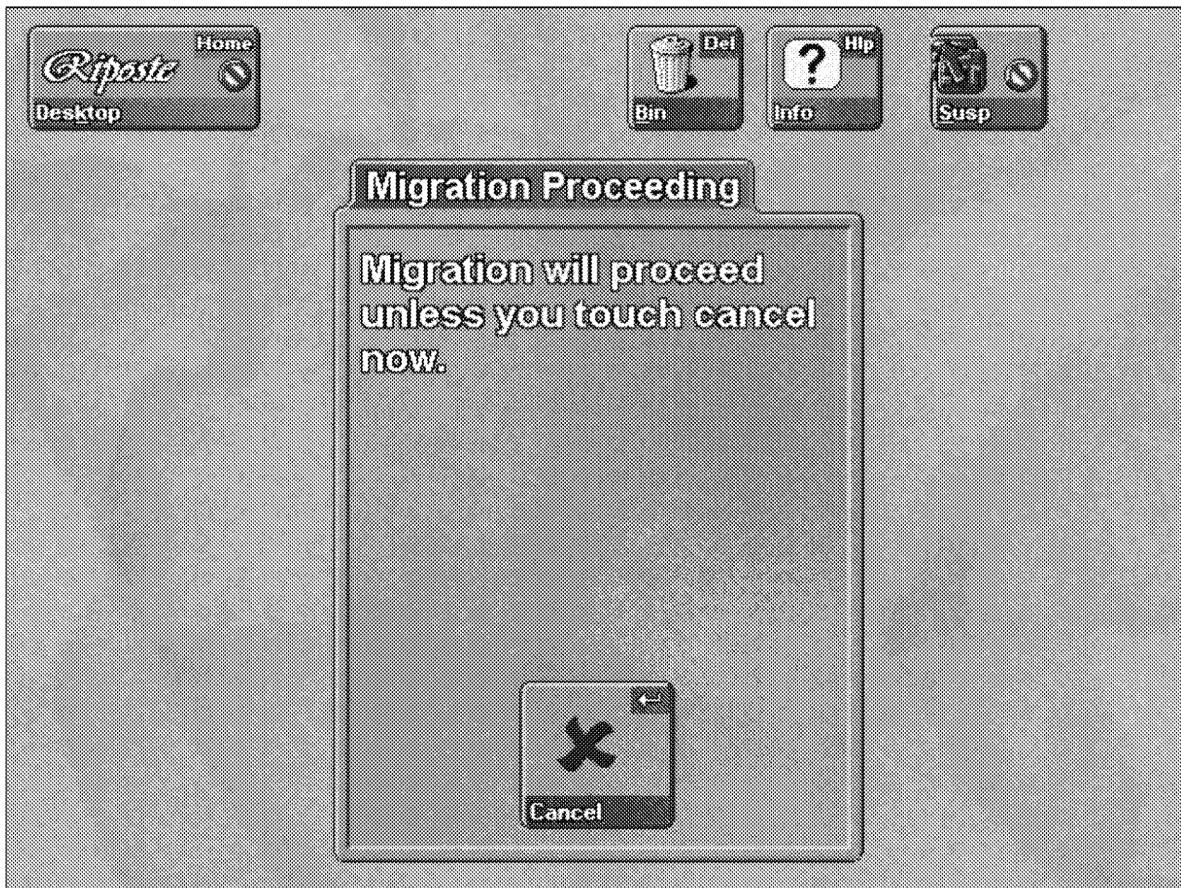
Believe it or not it could go wrong

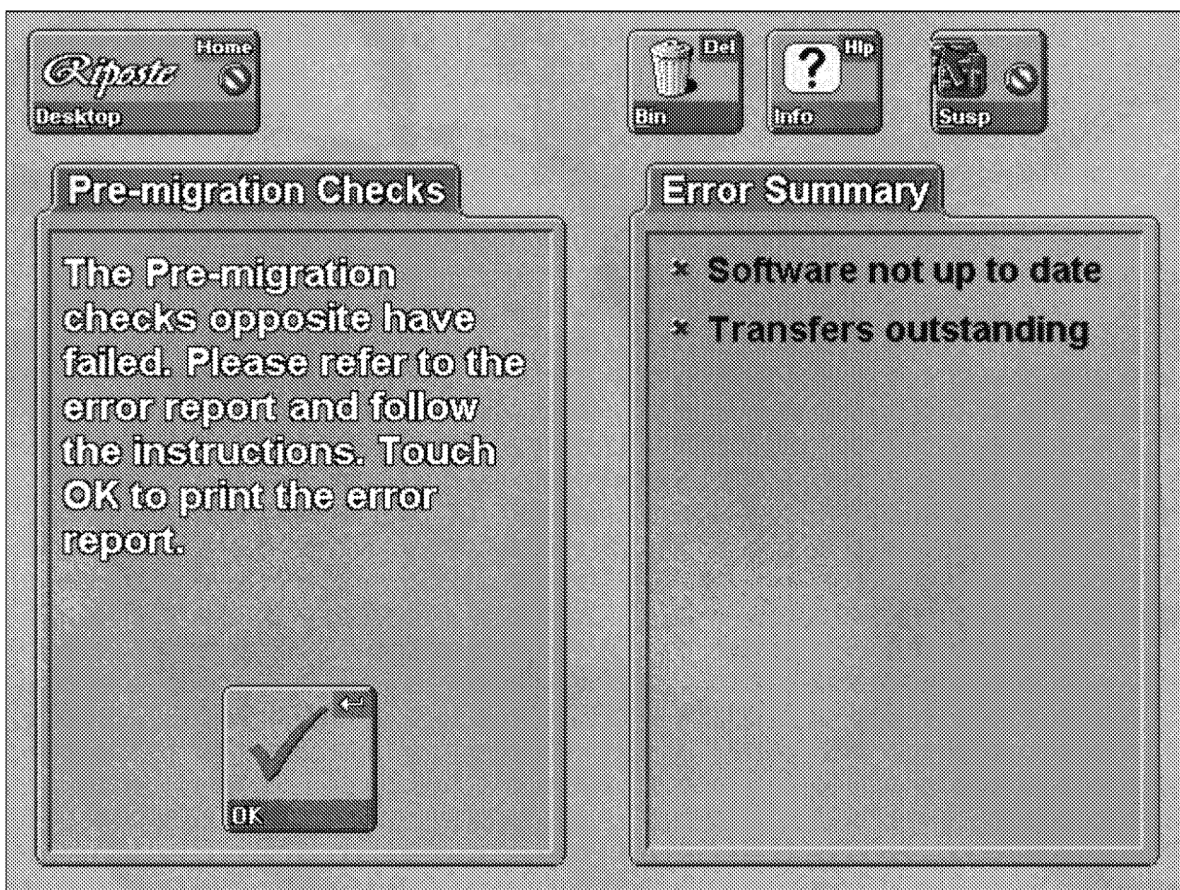


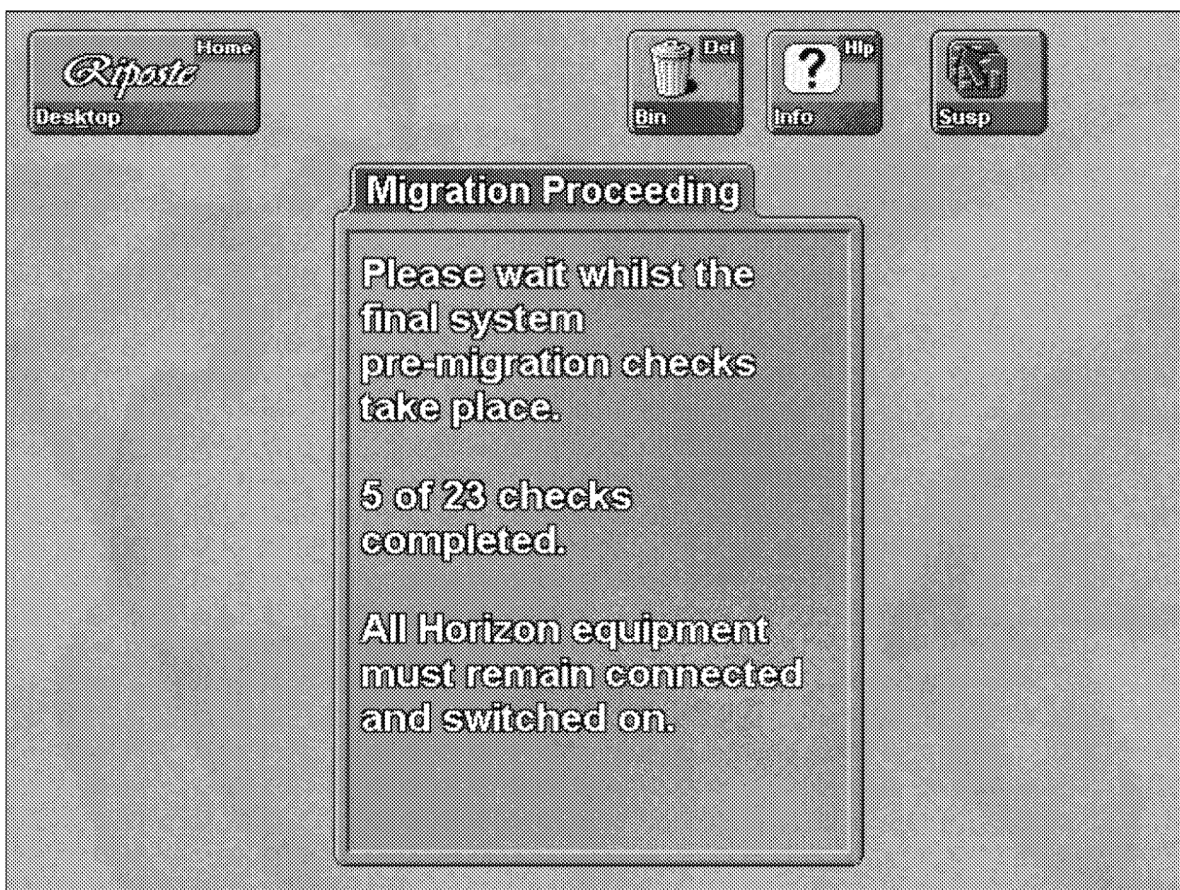




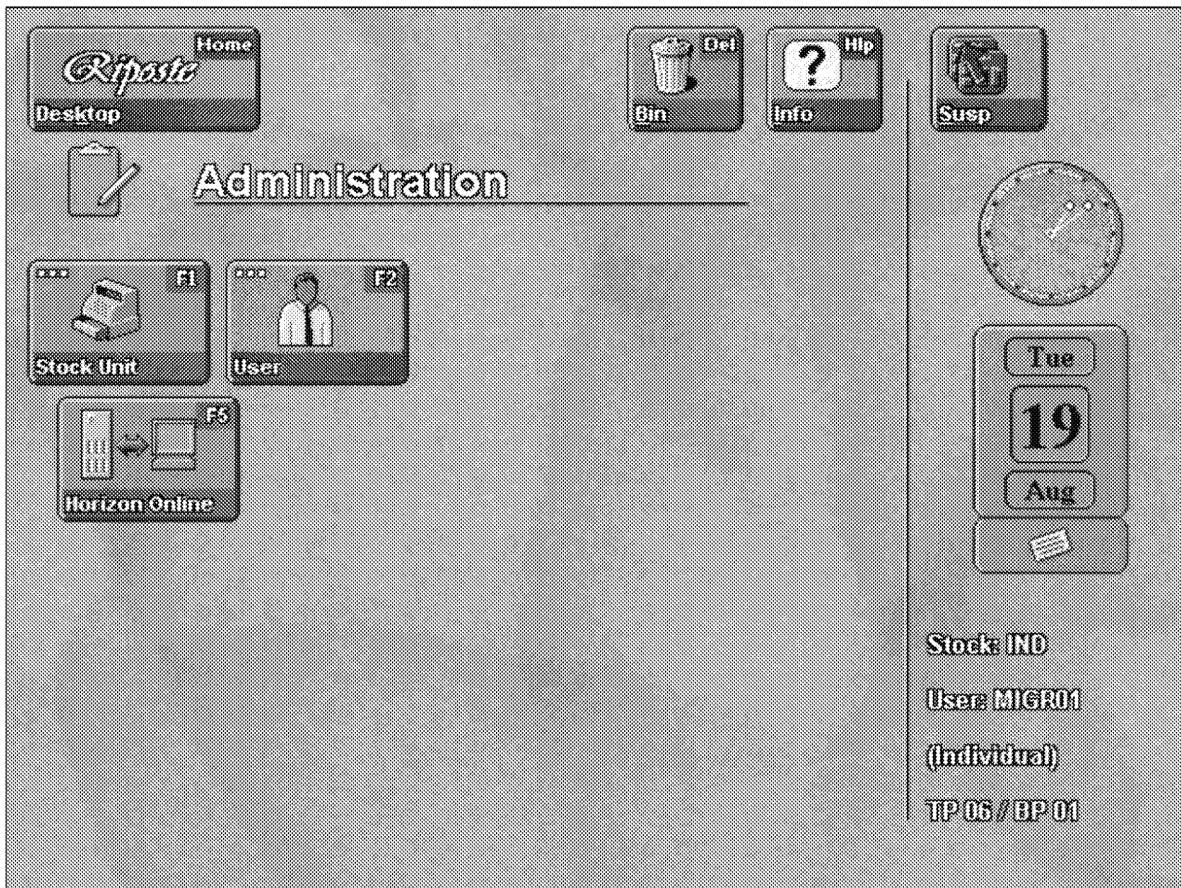






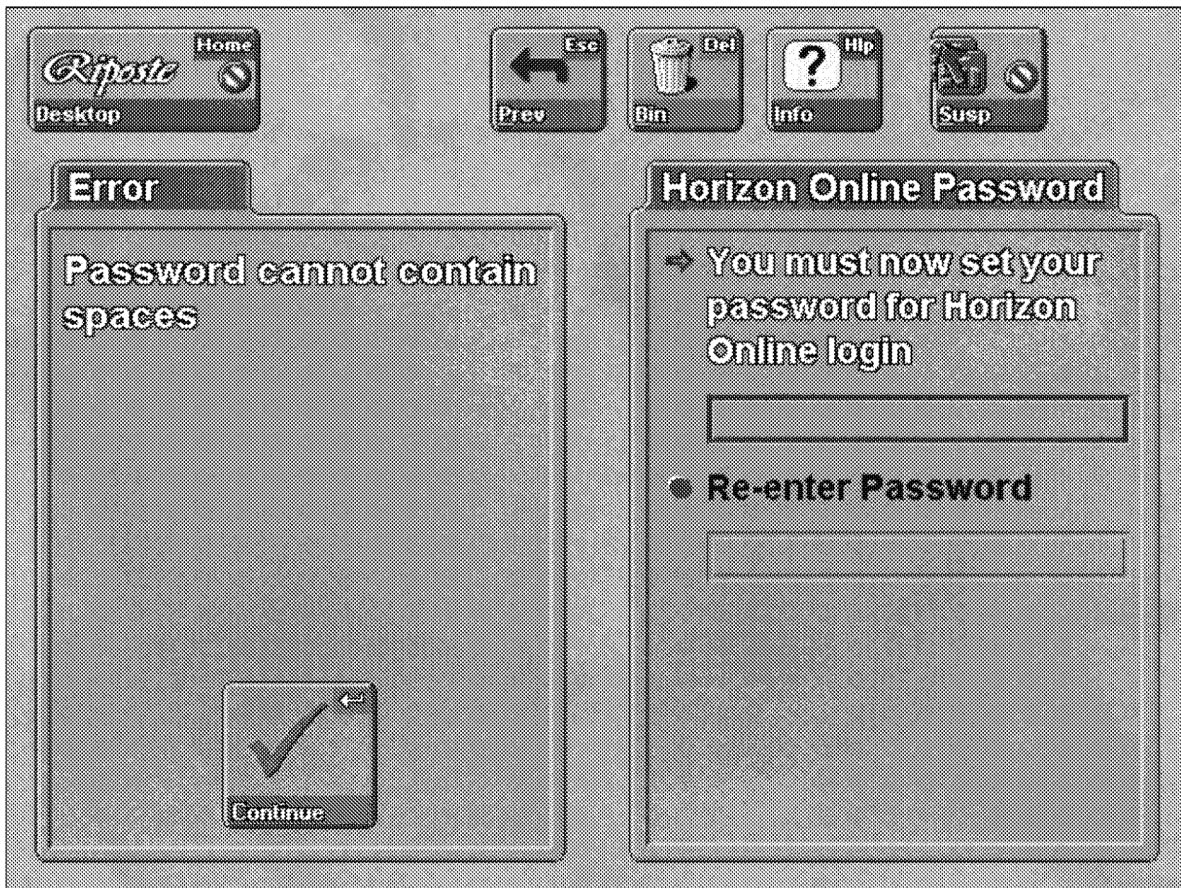


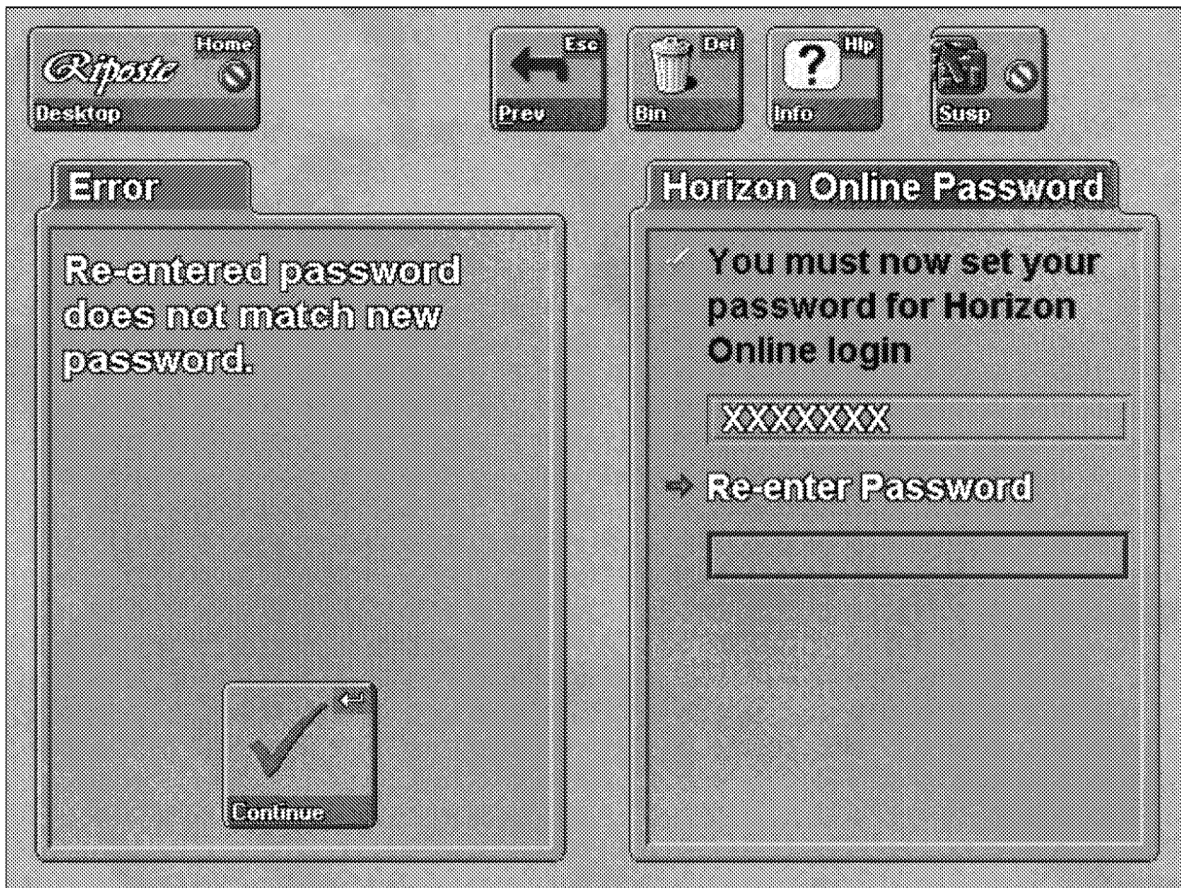




Password Problems!



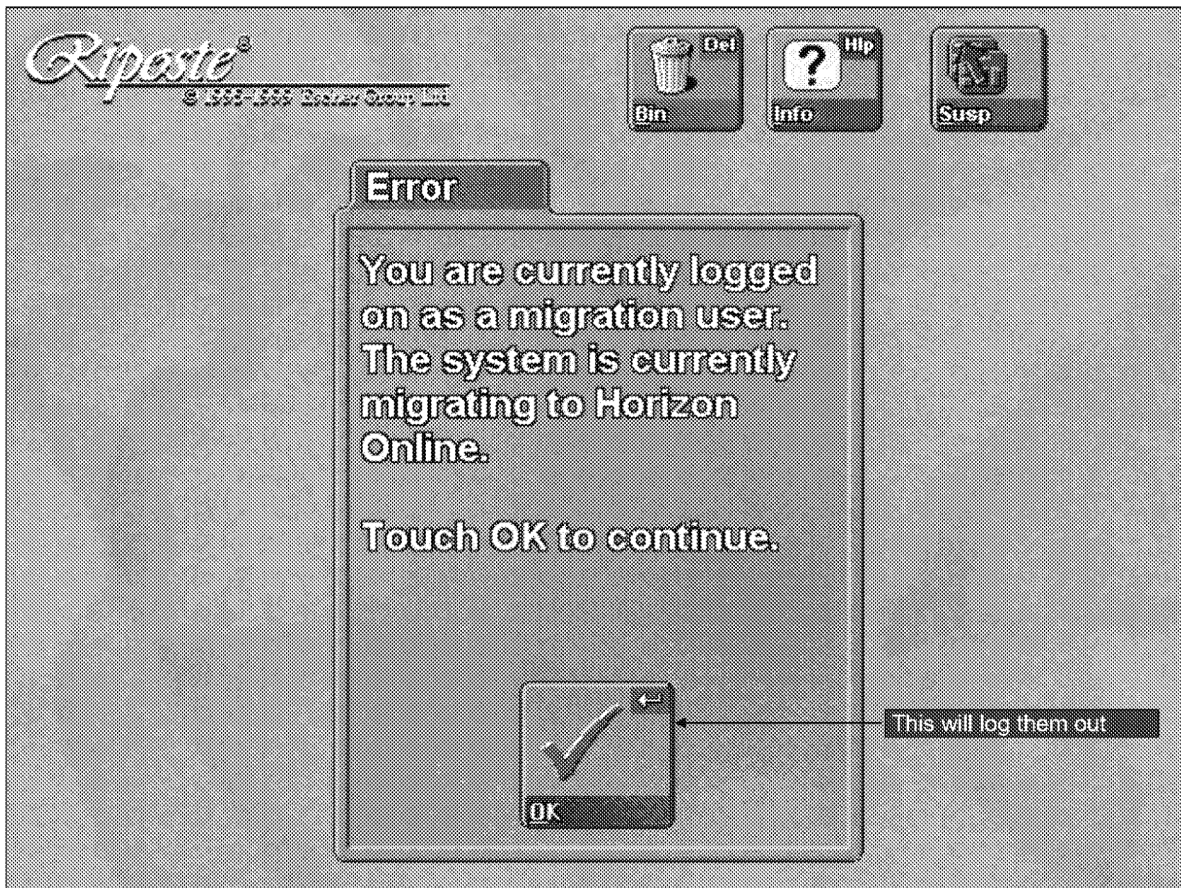


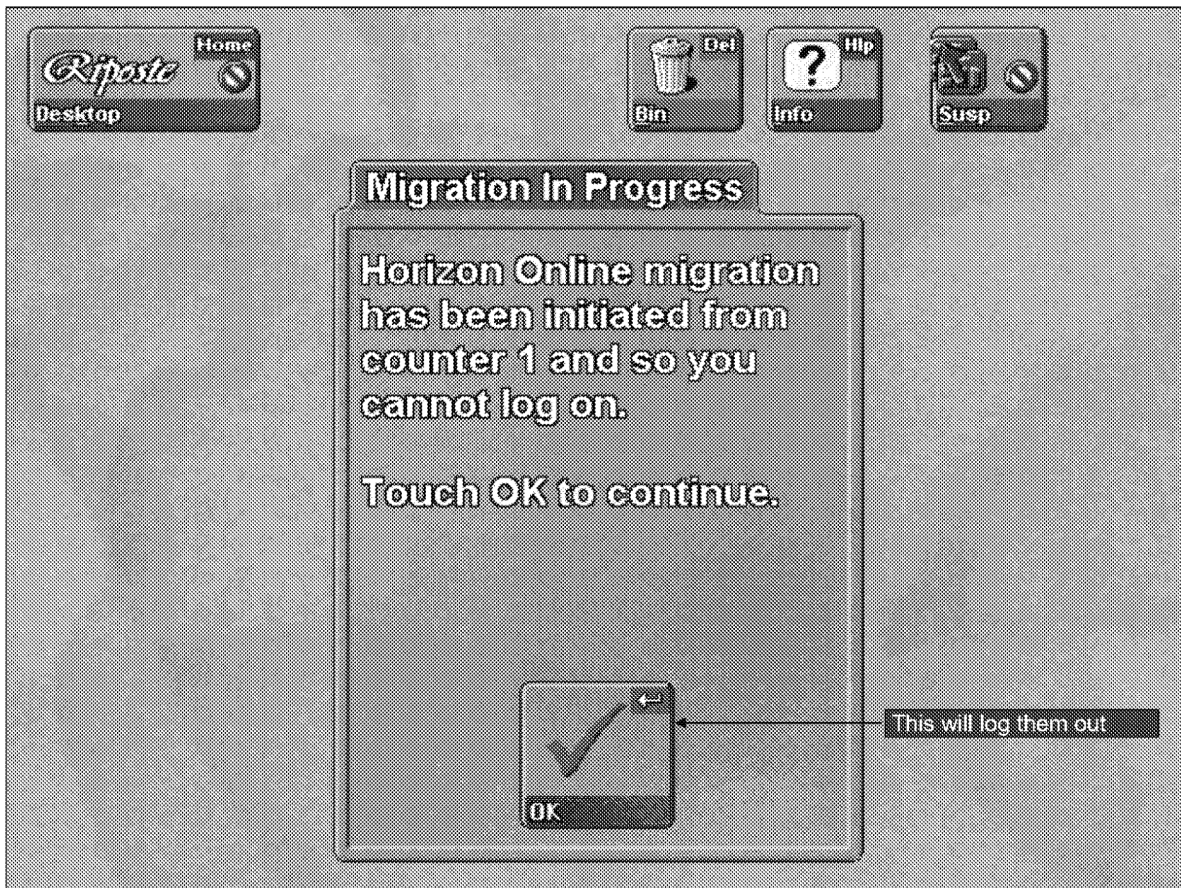


What happens if.....

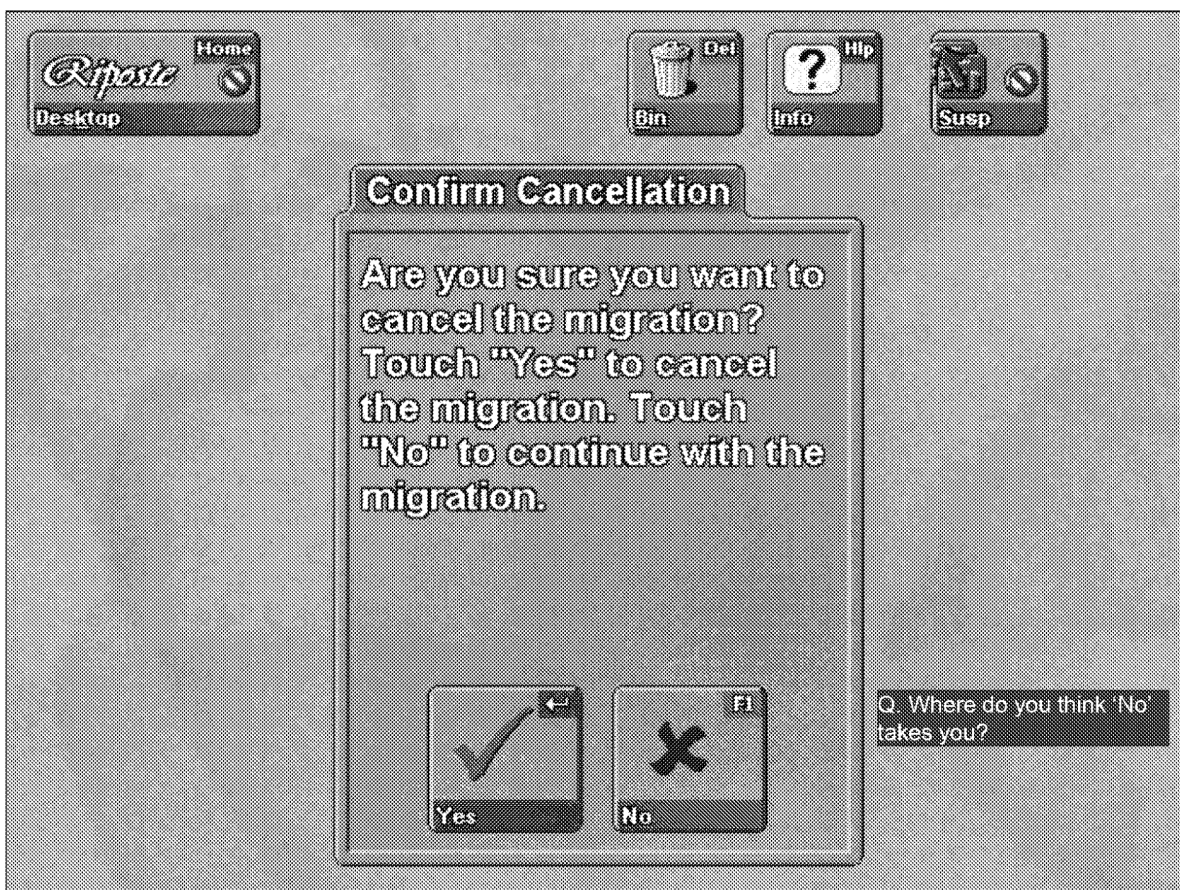


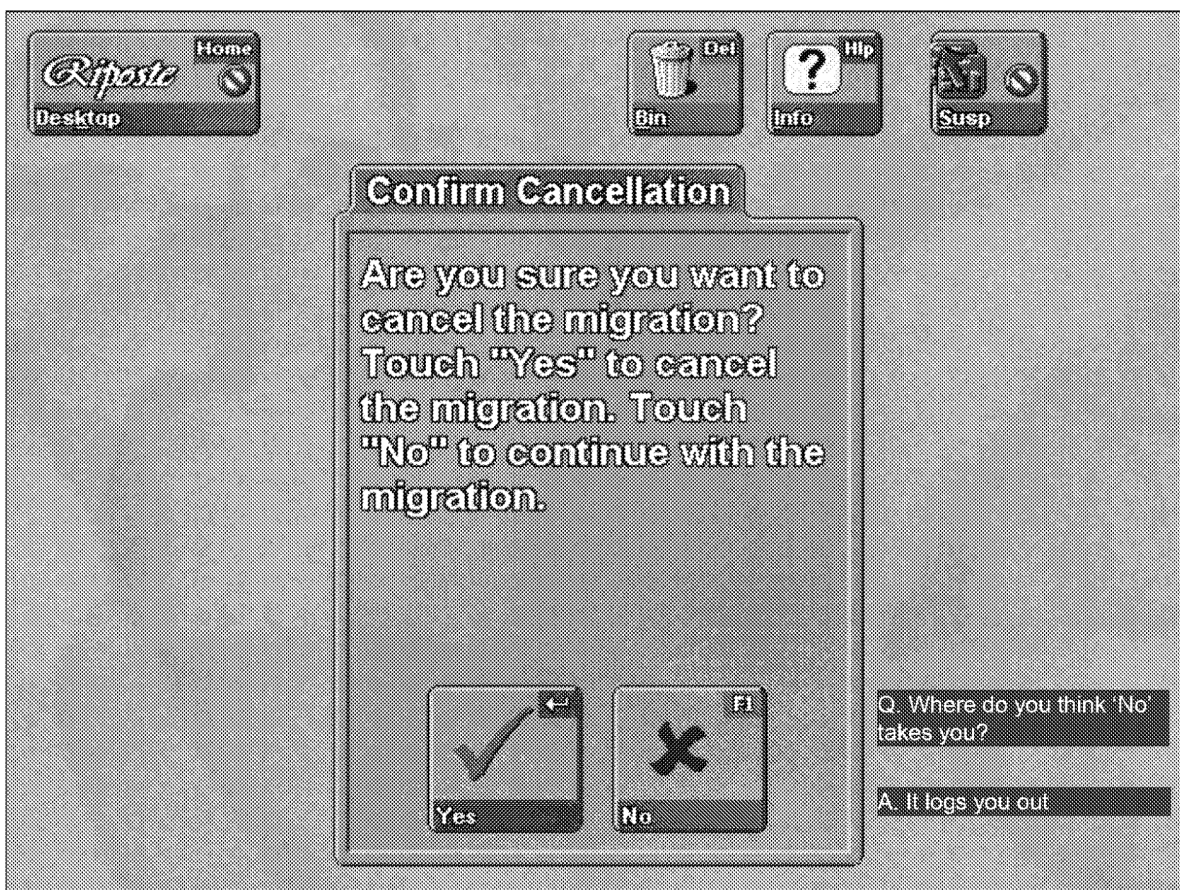
- the manager tries to log on to another counter whilst the migration is in progress?
- a non-manager tries to log in during the migration process or after the manager has logged out at the end of the migration day?
- a manager logs in after migration has completed locally but has not yet been confirmed by the end of day harvest?

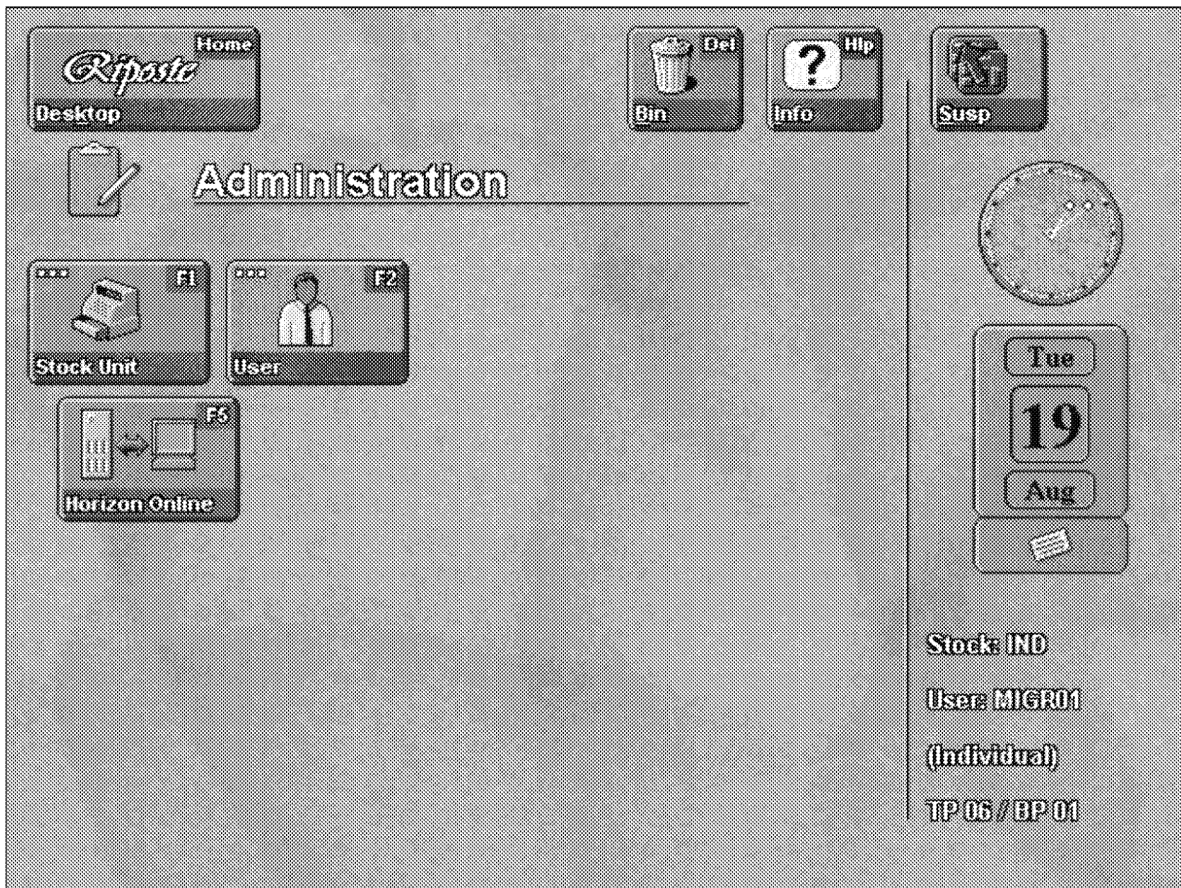












The next morning.....




Touch Screen or Press Enter to Continue

Online

ENTER

Home	Log On		Wed 26 May 06 10:50		Help
	Enter your username and password to log on Help desk number GRO				
Stamps	Username				Screen Entry
F1	<input type="text"/>				T1
Postal Services	Password				Suspend/Resume Lock
F2	<input type="text"/>				T2
Banking					
F3					
Travel					
F4					
Utilities & Government					
F5					
Telephony					
F6					
Retail					
F7					
Local Schemes					
F8					

Agreement



If you proceed further without authority you will commit a criminal offence for which you could be prosecuted and/or disciplined.

I agree

I disagree

Remove Item	Scroll Up	Scroll Down
F9	1	2
View Full Receipt	Receipt	Back Office
F10	RECPT	F11
Calculate	Logout	Quantity
F12	F13	F14
Print	PLU	Settle
F15	F16	

Enter


Online

Home	Log On Wed 28 May 08 10:50		Help
	Enter your username and password to log on		
	Help desk number	GRO	
Stamps	Username		Screen Entry
F1	<input type="text"/>		T1
Postal Services	Password		Suspend/Resume Lock
F2	<input type="text"/>		T2
Banking	Total Due To Customer		
F3	£ 0.00		
Travel	Quantity	<input type="text"/>	PREV
F4			
Licences & Government	Remove Item	Scroll Up / Scroll Down	Cancel
F5			UNDO
Telephony	New Full Basket	Receipt	Back Space
F6			
Retail	Calculate	Logout	Enter
F7			
Local Schemes	Pay Cash	PLU	
F8			
Online			

Home	Log On	Mon 22 Apr 09 12:43		Help
Input your username and password then press enter				Screen Entry
Username BRANTK				T1
Password				Suspend Resume Lock T2
Total Due To Customer				
£ 0.00				
Quantity				Previous
1				PREV
Remove Item F9	Scroll Up J	Scroll Down K	Cancel UNDO	
View Full Basket F10	Receipt RECPT	Back Office F14	Back Space	
Calculate F11	Logout F13	Quantity F16	Enter	
Fast Cash F12	PLU	Settle F15		
Online				

Home	Log On		Mon 22 Apr 09 12:43	Help
Input your username and password then press enter				Screen Entry
Username <input type="text" value="BRANTK"/>				T1
Password <input type="password"/>				Suspend Resume Lock T2
Total Due To Customer: <input type="text" value="£ 0.00"/>				
Quantity <input type="text" value="1"/>				Previous PREV
Remove Item F9	Scroll Up J	Scroll Down K	Cancel UNDO	
View Full Basket F10	Receipt RECPRT	Back Office F14	Back Space	
Calculate F11	Logout F13	Quantity F16	Enter	
Fast Cash F12	PLU	Settle F16		
Online				

Home	Log On	Mon 22 Apr 09 12:43	Help
	Input your username and password then press enter		
	Username BRANTK		Screen Entry T1
	Password *****		Suspend Resume Lock T2
		Total Due To Customer £ 0.00	
		Quantity 1	Previous PREV
	Remove Item F9	Scroll Up 1	Cancel UNDO
	View Full Basket F10	Receipt RECPT	Back Space F14
	Calculate F11	Logout F13	Enter F16
	Fact Cost F12	PLU	Settle F15
Online			

Home	Horizon Home					Mon 22 Apr 09 12:43			Help	
Select product or function or navigate to another product screen using the tabs or token										
Stamps	1st	1st Large	1st x12	1st x6	Post Mail Items				Screen Entry	
F1	11	12	13	14	16				T1	
Postal Services	2nd	2nd Large	2nd x12	Open Postage Stamps					Suspend Resume Lock	
F2	21	22	23	24					T2	
Banking					Total Due To Customer					
F3	Bureau									
Travel	Buy Euro EUR	Sell Euro EUR	Buy Dollars USD	Sell Dollars USD	Quantity				Previous	
F4	41	42	43	44	1				PREV	
Licences & Government	Previous Login Details				MSG10102		Remove Item	Scroll Up	Scroll Down	
F5	 Welcome BRANTK Last successful log: 22/04/2009 08:43:34 BST The number of failed attempts since last log on: 0						F9	1	1	Cancel
Telephony					View Full Basket		Receipt	Back Office	Back Space	
F6					F10		RECPT	F14		
Retail					Calculate		Logout	Quantity	Enter	
F7			F11	F13	F15					
Local Schemes			F12	PLU	Settle					
F8			F12	F16						
BRANTK TP: 1 BP: 11 SU: A2B Shared Serve Customer K:										

Home	Horizon Home Mon 22 Apr 09 12:43					Help
	Select product or function or navigate to another product screen using the tabs or token					
Stamps	1st	1st Large	1st x12	1st x6	Post Mail Items	Screen Entry
F1	11	12	13	14	16	T1
Postal Services	2nd	2nd Large	2nd x12	Open Postage Stamps		Suspend Resume Lock
F2	21	22	23	24		T2
Banking						
F3						
Travel	Bureau					
F4	Buy Euro EUR	Sell Euro EUR	Buy Dollars USD	Sell Dollars USD		
	41	42	43	44		
Licences & Government						
F5						
Telephony	Giros					
F6	Violet Cashed	Green				
	61	62				
Retail						
F7						
Local Schemes	Other					
F8	AP Manual Entry	Chip & Pin	Transcsh	Asylum Smartcard	Fast Cash	
	81	83	84	86	F12	
Total Due To Customer						
Quantity						
						Previous
						PREV
Remove Item						Cancel
F9						UNDO
View Full Basket						Back Space
F10						
Calculate						Enter
F11						
Logout						
F13						
Quantity						
F15						
PLU						
Settle						
F16						
BRANTK TP: 1 BP: 11 SU: A2B Shared Serve Customer K:						

Problems!!



Murphy's law says that what can go wrong will go wrong.



It means either.....



A) a user with manager access has tried to log on to a non-gateway terminal the morning after migration confirmation and completion and:

1. The counter terminal has not migrated to Horizon Online or;
2. The gateway (and therefore the branch) is still on Horizon

Or:

B) a user without manager access has tried to log on before the manager has confirmed and completed migration

Touching OK will force log out

You could also see.....

Post Office® [DateTime]

101

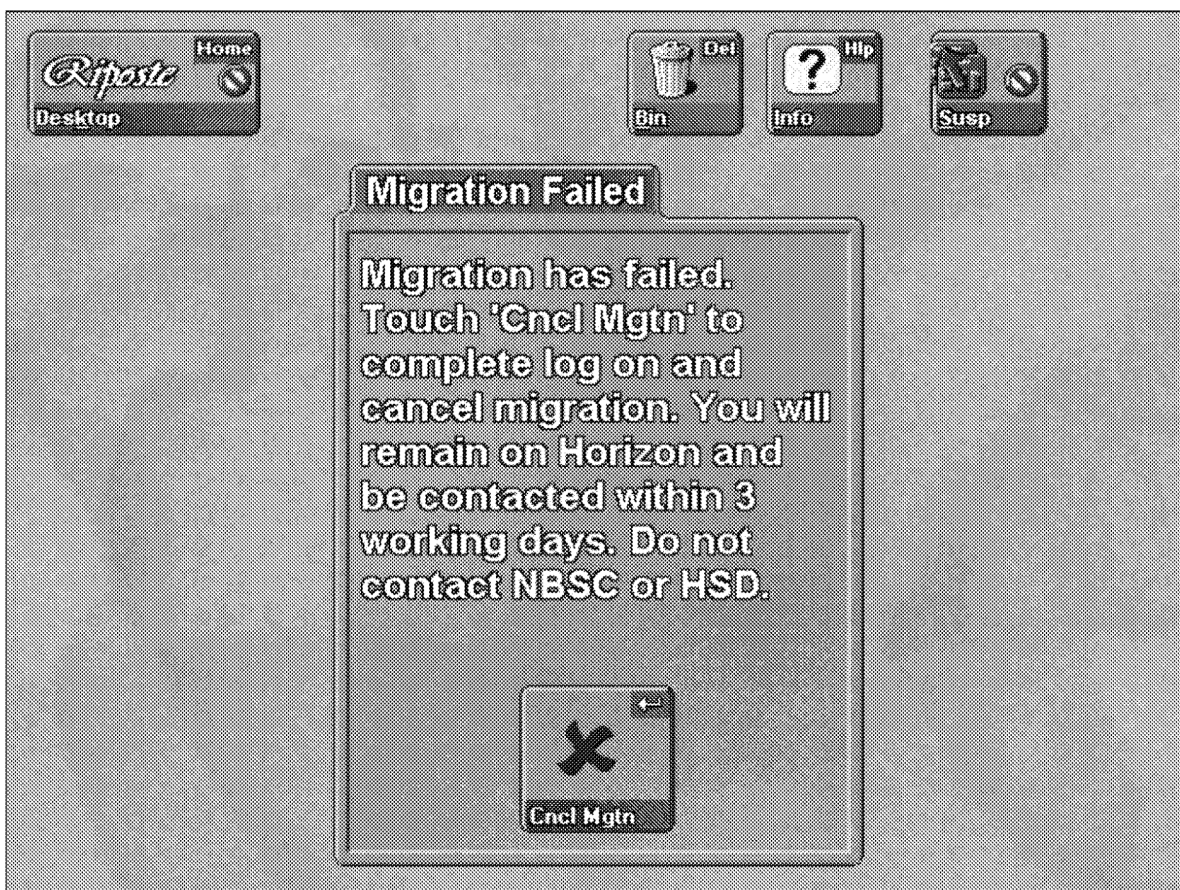
The tolerance levels of failed counter terminals to allow migration to Horizon Online™ is

1 - 4 Terminals - No Terminal Failures

5 - 7 Terminals - 1 Terminal can fail

8 - 10 Terminals - 2 Terminals can fail

11 or more - 3 Terminals can fail



Questions





Compliance & Conformance

Post Office®



Conformance & Compliance checks



- Branch security
- Office opening hours
- Mails integrity
- Mails segregation
- Use of PIP template
- Use of oral statements re Travel Insurance
- Check user ID's
- Cash/stock and cheque's on hand
- Reporting/SharePoint

Branch Security



When you arrive at the counter you should look at the following;

- Parcel hatch – is it closed? If no ask them to close it.
- Counter door – is it closed? If no ask them to close it
- Safe – is it closed? If no ask them to close and lock.
- Are the safe keys in the lock? If yes ask them to lock safe and remove the keys.

Note down any breaches in security on SharePoint

Office Opening Hours



Prior to your branch visit make a note of what the opening hours should be.

At the branch compare the advertised hours to the ones you have.

If they are different try to find out when they were changed.

Note the information on SharePoint

Mails Integrity



Ensure that all mail items are accepted and retained within the secure area, kept safe until transferred to an authorised postal collector.

For customer convenience some branches leave mails sacks on the customer side so that customers in a hurry can just drop off their mail. *IF YOU SEE THIS, you must raise it with the team and stop it immediately, all mail must be retained in the secure area and nowhere else.*

Segregation of mails



- Whenever 1st & 2nd class packets are accepted from a customer any postage stamps affixed to the packets must be cancelled using a date-stamp. There is no need to cancel Postage Labels.
- All 1st and 2nd class packets should be placed into separate grey mailbags. 1st and 2nd class packets should not be mixed together or with any other mail items.
- All other items (letters, large letters and international items) should be placed in a separate mail bag as normal. *You must ensure this is happening and if it isn't raise it with the team, explaining the correct process and the importance to POL.*

Use Of PIP Template & Travel Insurance Oral Statements



Ensure that the PIP Template is being used for all Mail that is accepted across the counter. Try to observe some mails transactions whilst you are at the branch.

Ensure that when a Travel Insurance policy is being sold the two oral statements and the important information sheet are used correctly.

If you do not see either a mails or travel insurance transaction ask to see the template for mails transactions or the statements, important information for travel insurance.

Check all User ID's



Check all user ID's and delete any that are either non compliant or those that are redundant.

Check that all users have their own user name on the system and ensure that it is set up in the correct format, as laid down in the operating instruction e.g. John Smith should be set up as JSM001 - which is the first letter of the first name followed by the first two letters of the last name then 001 or 002 etc.

Any found to be incorrectly set up must be deleted and set up correctly.

Check all User ID's



There are a couple of exceptions, these are;

In Crown offices the FSS - Financial Services Specialist - could be set up with a suffix of FSS as opposed to 001, 002 etc, so John Smith would be JSMFSS.

Some offices that transact Bureau de Change will have a separate username purely for logging on to the Bureau till/SU. These may be suffixed with BDC or BUR so John Smith would be seen as either JSMBUR or JSMBDC or all BDC users could be suffixed with 007 or 009 simply to differentiate between this and their standard counter logon. These are all acceptable.

Please ensure that you remind offices of password rules particularly around not sharing passwords with any other colleagues.

SharePoint



You must ensure that you complete the SharePoint Proforma for each office you attend. This should be completed within seven days.

You can access the SharePoint site through the link that you will be sent by E-Mail

Questions





Use & Set up of Lap tops

Post Office®



Lap tops



- Care of the Lap tops
- Security – asset management
- Switching them on!!
- Shutting them down

Dell laptops



- Touch screen tablet PC
- Unsupported by the business (Systemline)
- Limited support from the programme/supplier
- Locked down build – limited changes
- Two user accounts –
 - Admin (password protected)
 - Training
- Windows Vista operating system

Questions





Horizon Online Demo Programme (PT1)

Post Office®





Q&A and Close

Post Office®

